

A person is riding a bicycle on a dark, silhouetted hillside. The background features a vast, calm lake or fjord with several small islands, and a range of dark mountains in the distance under a deep blue sky. The overall scene is serene and emphasizes nature and outdoor activity.

STATE OF THE NATION SHIMANO EUROPE

To promote health and happiness through the enjoyment of nature and the world around us.

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WHAT IS THE STATE OF THE NATION?

The State of the Nation report is a reality check for the cycling industry. It is a survey conducted among 25,000 Europeans that shows how cycling is actually experienced today. By families deciding whether their children ride, by riders navigating infrastructure, and by people weighing the effort of maintaining their bicycle.

This is not a celebration, and it is not neutral.

It is a challenge to the industry to respond with urgency and intent, because if cycling is to remain relevant in a world that competes for attention, health and trust, standing still is not an option.



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WHY WE DO THIS

Shimano's goal is to increase the number of cyclists across Europe.

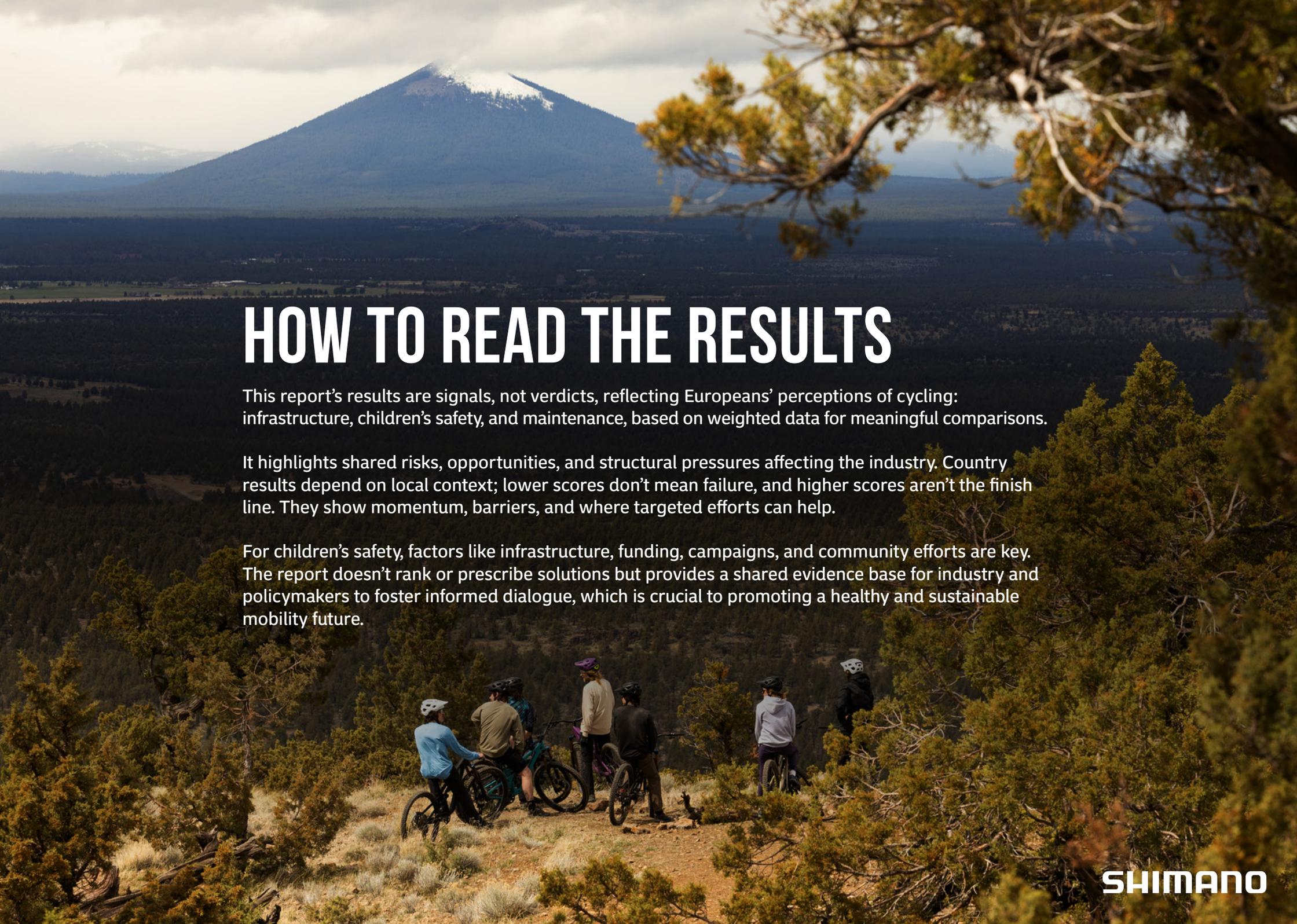
The research topics selected for this report were chosen to have the most impact on this goal.

These topics are among the most important reasons people do or do not cycle. For all our research topics, we found that data was missing or needed updating.

Providing these insights should positively steer decision-making for all.



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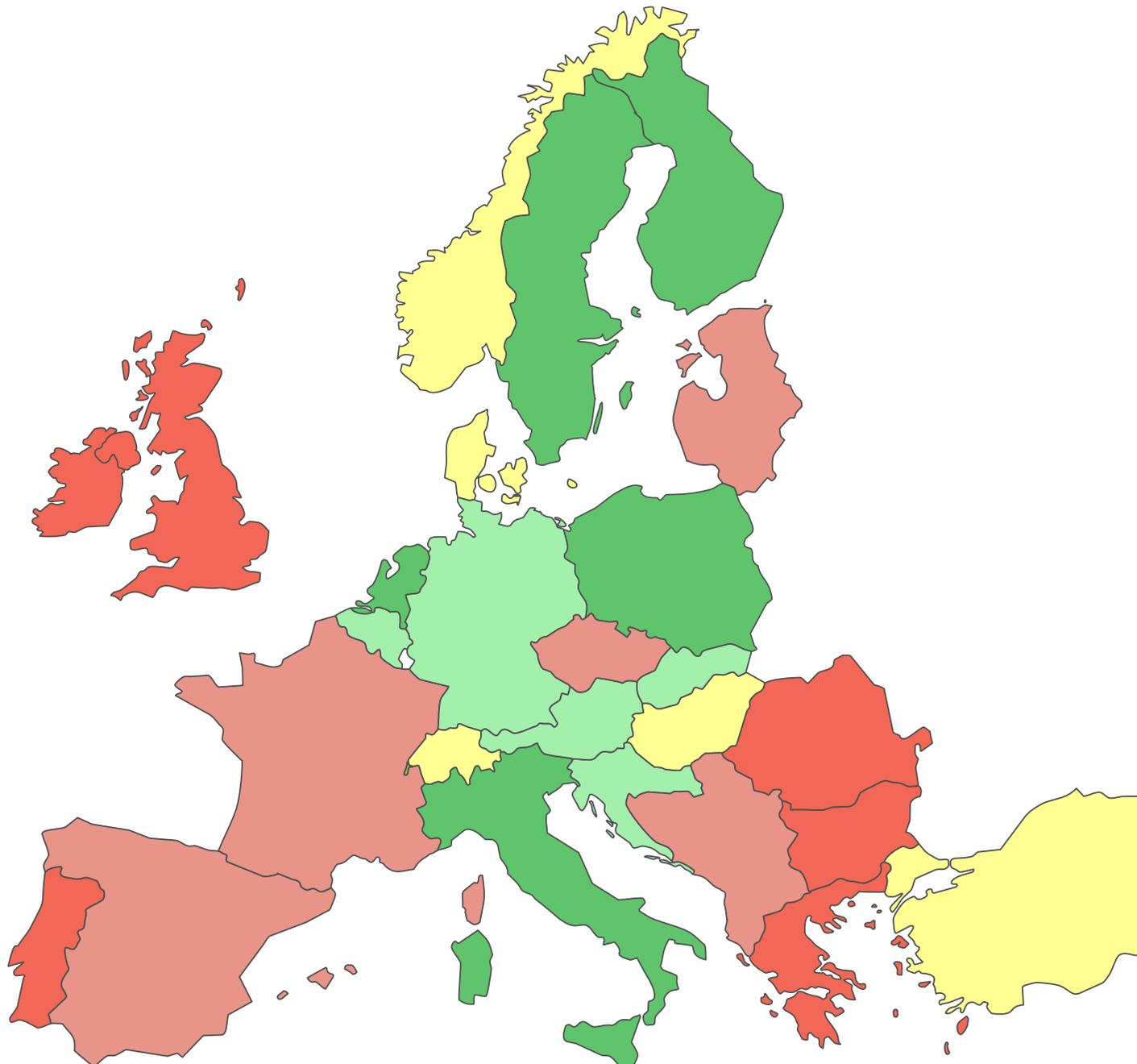
HOW TO READ THE RESULTS

This report's results are signals, not verdicts, reflecting Europeans' perceptions of cycling: infrastructure, children's safety, and maintenance, based on weighted data for meaningful comparisons.

It highlights shared risks, opportunities, and structural pressures affecting the industry. Country results depend on local context; lower scores don't mean failure, and higher scores aren't the finish line. They show momentum, barriers, and where targeted efforts can help.

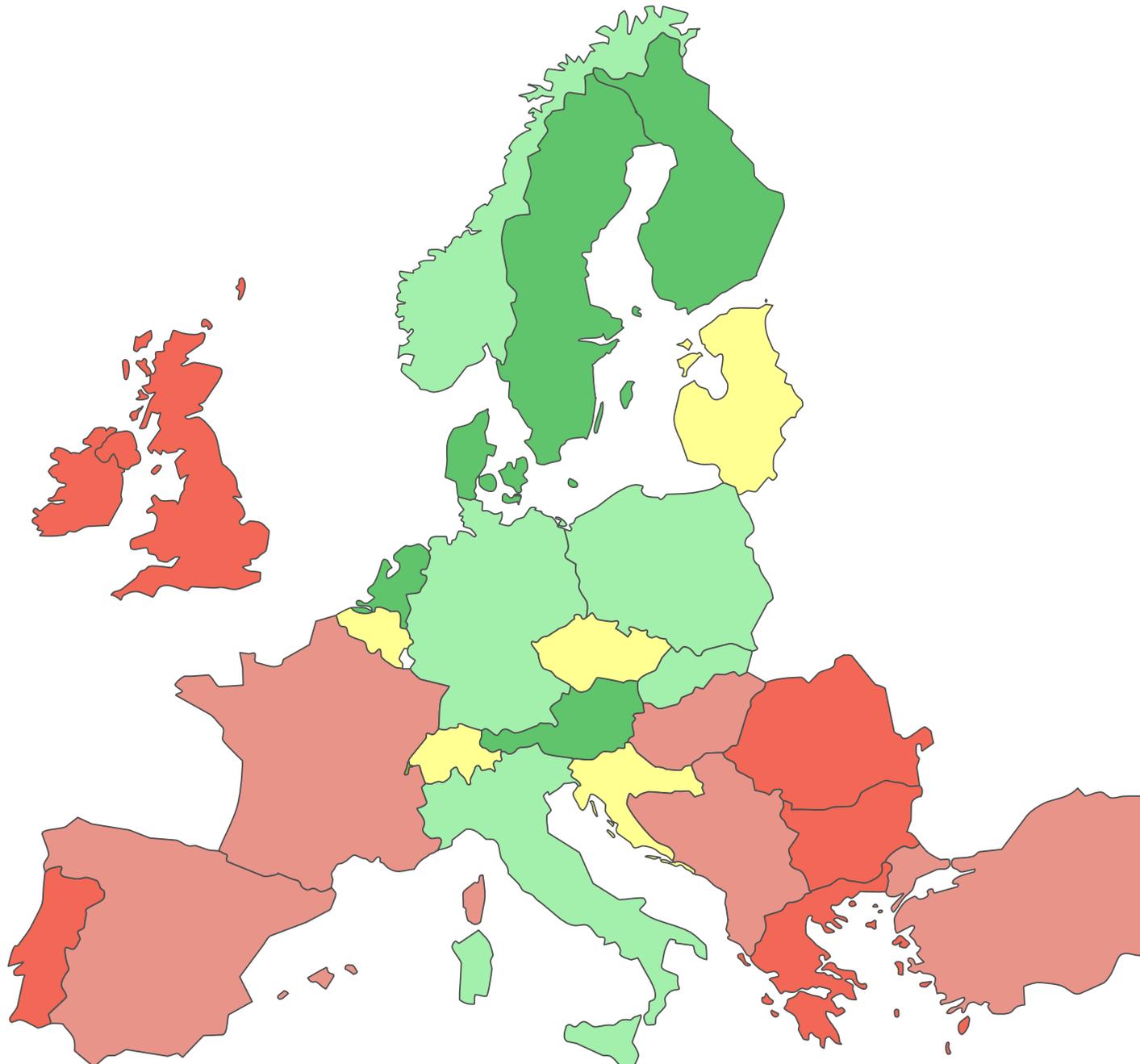
For children's safety, factors like infrastructure, funding, campaigns, and community efforts are key. The report doesn't rank or prescribe solutions but provides a shared evidence base for industry and policymakers to foster informed dialogue, which is crucial to promoting a healthy and sustainable mobility future.

The percentage of people in Europe who own a bike.



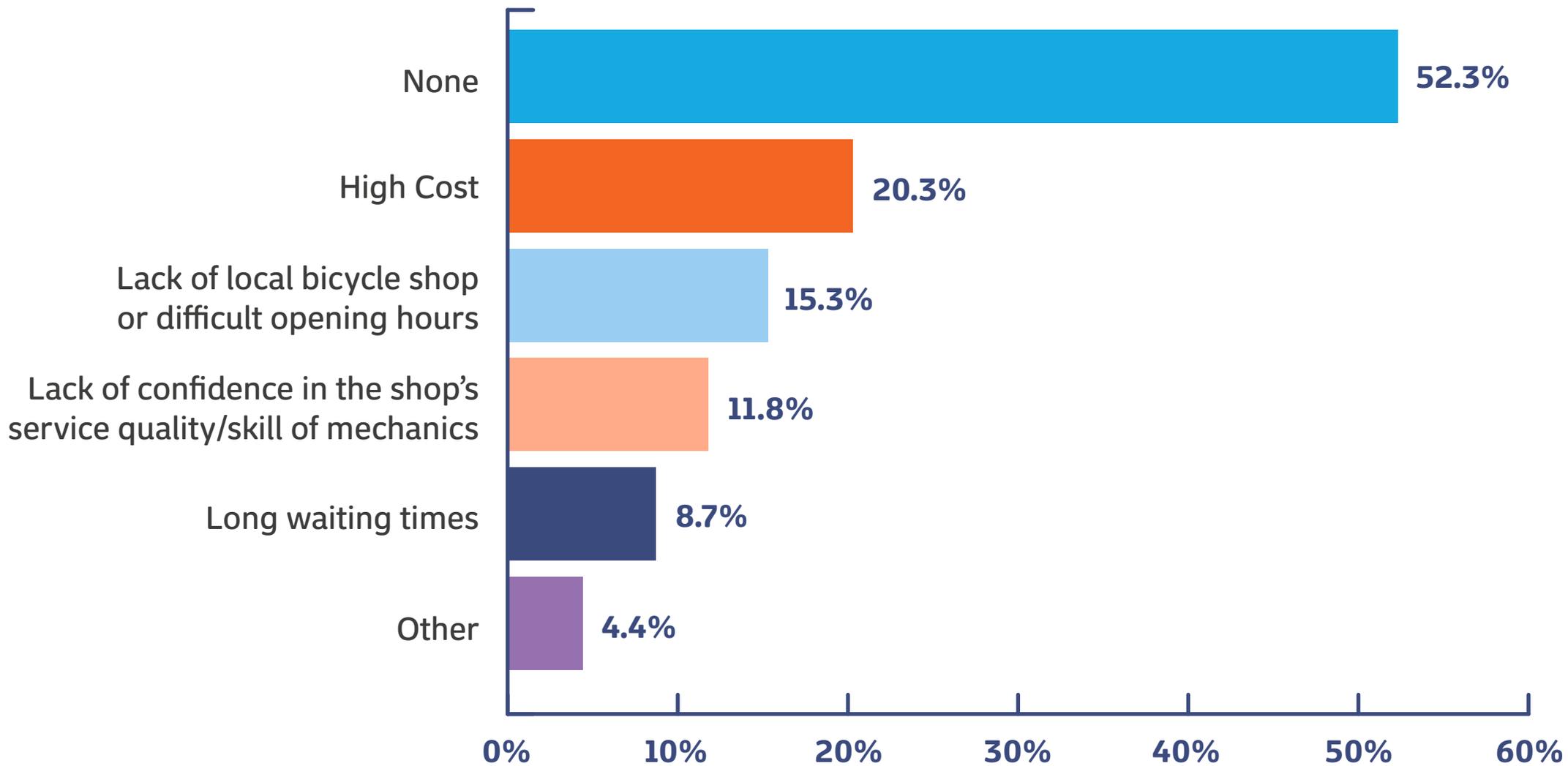
Netherlands	91.1%
Poland	79.3%
Sweden	78.6%
Finland	75.2%
Italy	74.7%
Slovakia	74.4%
Austria	74.2%
Germany	74.1%
Slovenia + Croatia	73.1%
Belgium	72.2%
Denmark	72.1%
Hungary	69.9%
Switzerland	69.8%
Norway	67%
Türkiye	65.9%
Czech Republic	65.5%
France	65.4%
Baltics	64.9%
Spain	62.2%
Balkans	61.4%
Romania	60%
Greece	57.8%
Portugal	55.9%
Bulgaria	54.1%
UK and Ireland	48.5%

The percentage of people who ever owned a bike.

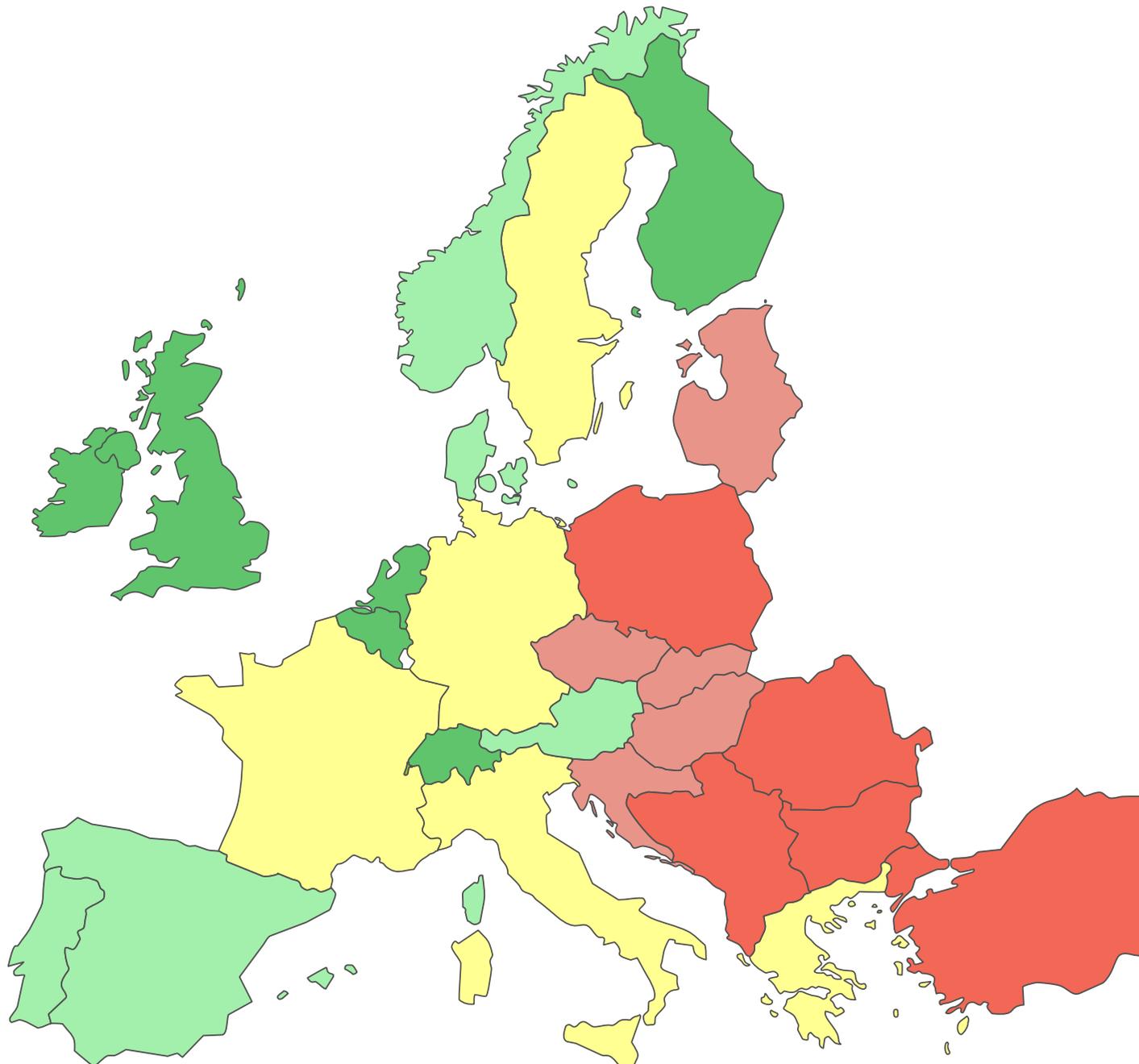


Netherlands	99.7%
Finland	98.4%
Sweden	98%
Denmark	97.9%
Austria	97.4%
Norway	97.1%
Germany	96.5%
Slovakia	96.2%
Poland	96%
Italy	95.7%
Belgium	95.6%
Switzerland	95.1%
Slovenia & Croatia	94.9%
Czech Republic	94.8%
Baltics	94.1%
Hungary	94%
Spain	91.6%
Balkans	91.3%
France	90.9%
Türkiye	90.8%
Greece	90%
Bulgaria	89.8%
Portugal	89.5%
Romania	88.2%
UK and Ireland	87%

The percentage of people in Europe who experience barriers to maintaining their bikes—per issue.

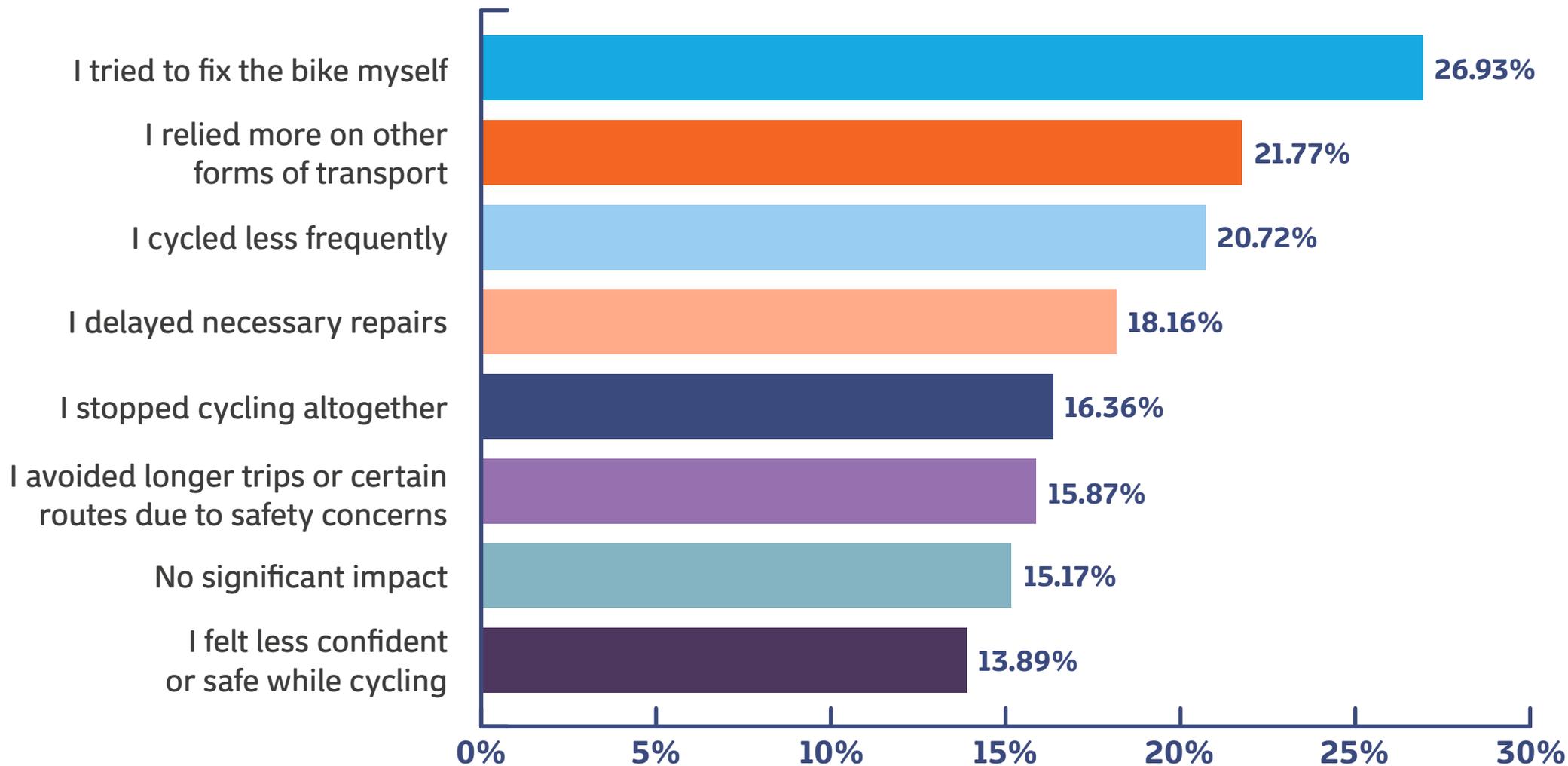


The percentage of people who experience barriers to maintaining their bikes—total.

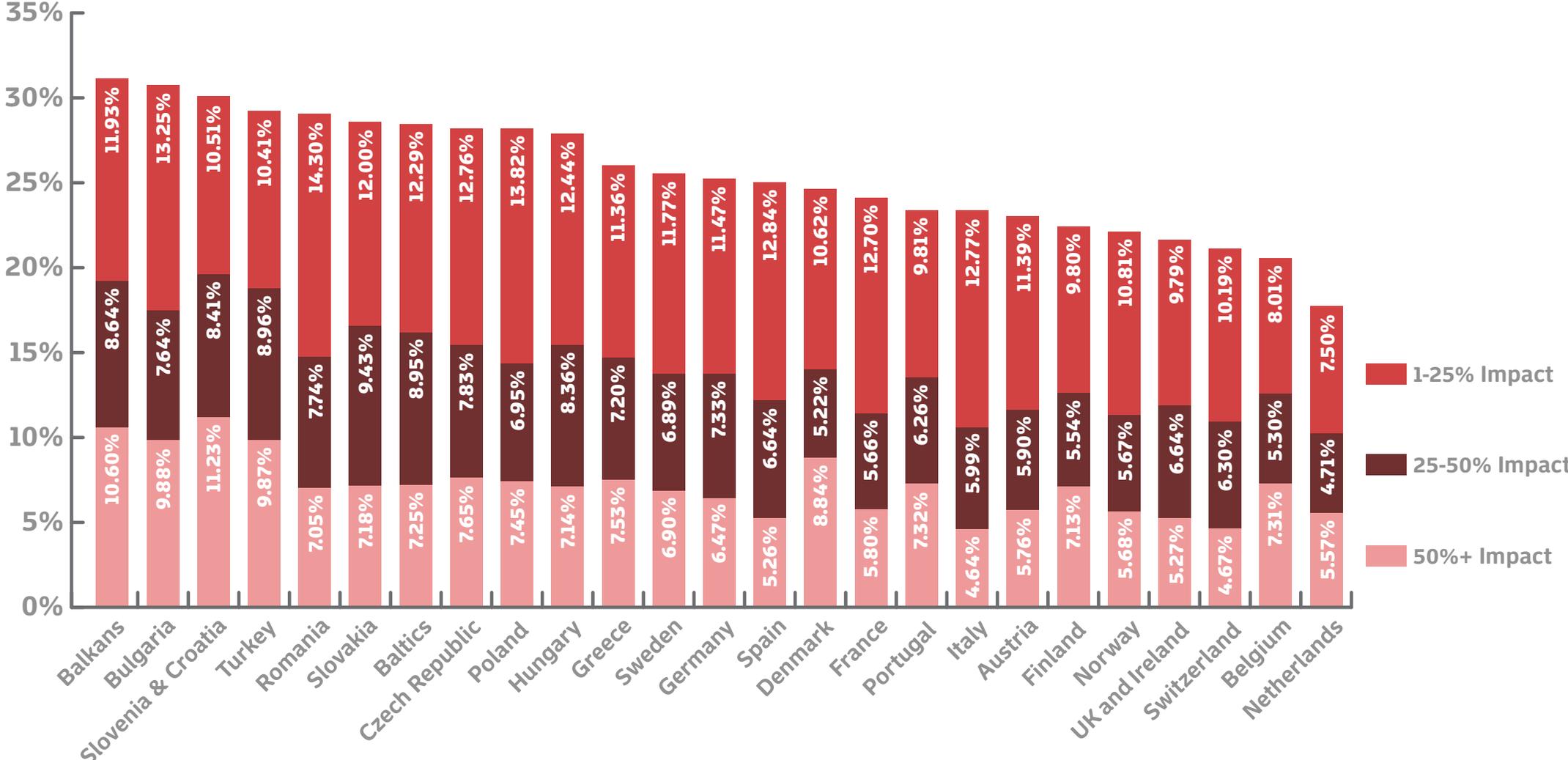


Netherlands	34.92%
Switzerland	40.49%
UK and Ireland	40.92%
Belgium	41.33%
Finland	43.29%
Austria	43.52%
Spain	43.73%
Portugal	44.41%
Norway	44.49%
Denmark	45.47%
Germany	46.64%
Italy	46.91%
France	46.93%
Sweden	47.30%
Greece	48.75%
Czech Republic	50.86%
Slovenia & Croatia	50.92%
Slovakia	52.42%
Hungary	53.44%
Baltics	53.52%
Poland	54.04%
Balkans	54.07%
Bulgaria	54.33%
Romania	55.62%
Türkiye	55.86%

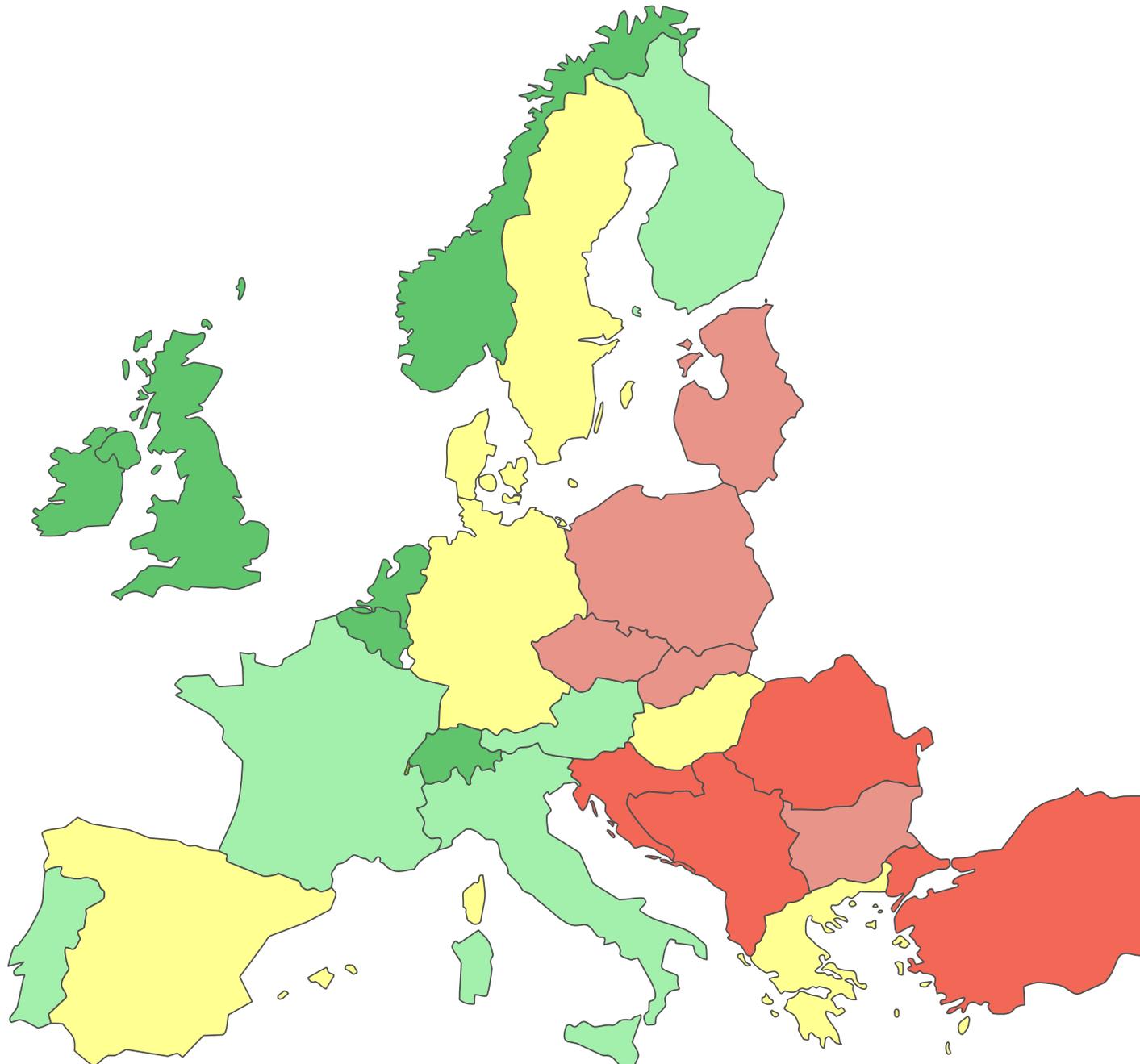
The impact of experienced barriers to maintenance, expressed as percentages.



The degree to which people cycled less frequently due to maintenance barriers.

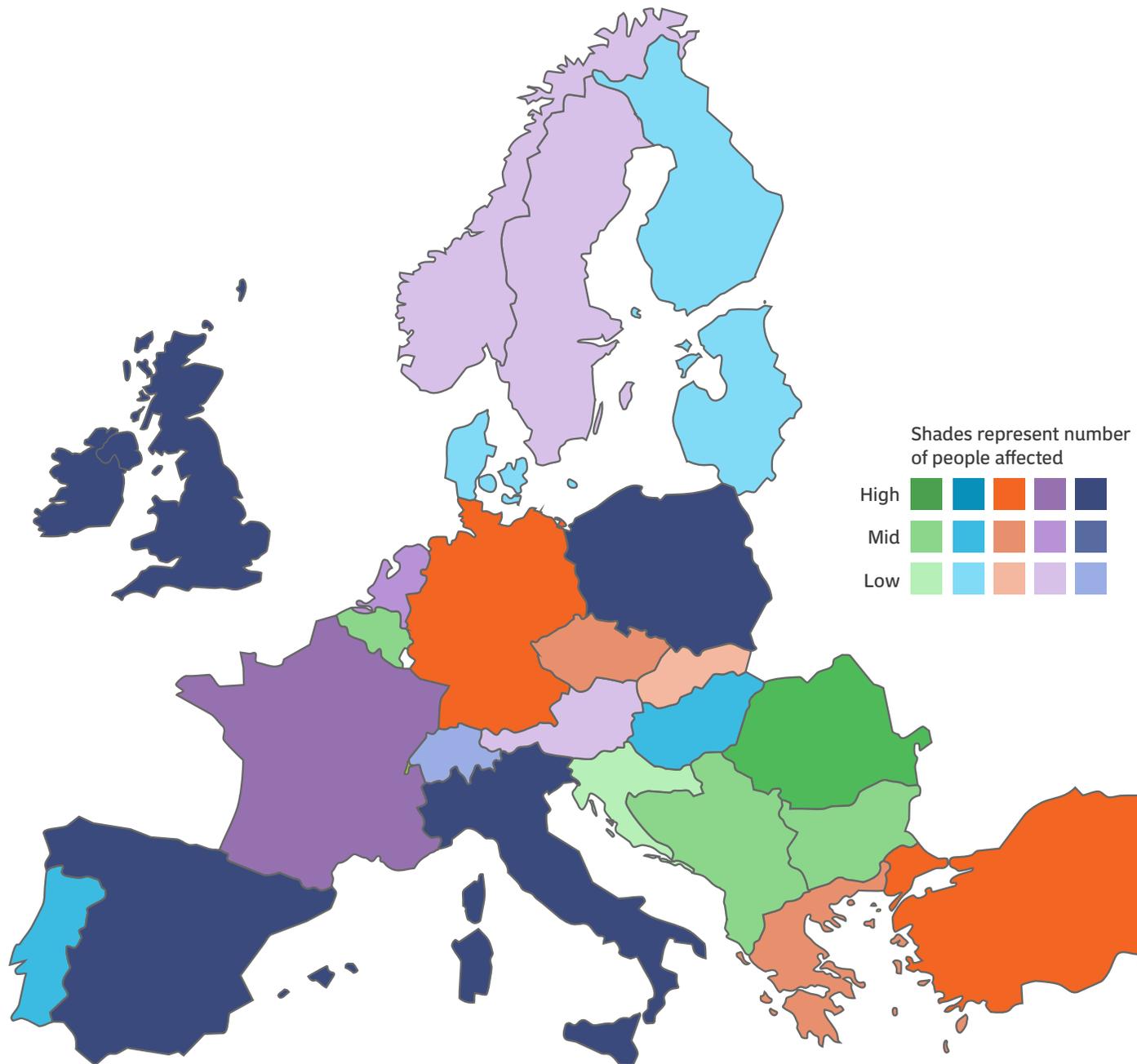


The percentage of each country's population aged 18 to 79 who cycle up to 75% less frequently due to maintenance barriers.



Netherlands	17.78%
Belgium	20.62%
Switzerland	21.16%
UK and Ireland	21.7%
Norway	22.16%
Finland	22.47%
Austria	23.05%
Italy	23.4%
Portugal	23.39%
France	24.16%
Denmark	24.68%
Spain	24.74%
Germany	25.27%
Sweden	25.56%
Greece	26.09%
Hungary	27.94%
Poland	28.22%
Czech Republic	28.24%
Baltics	28.49%
Slovakia	28.61%
Romania	29.09%
Türkiye	29.24%
Slovenia & Croatia	30.15%
Bulgaria	30.77%
Balkans	31.13%

Cycled >75% less due difficulties in accessing maintenance (in % of the total population).



Bulgaria	5.25%
Slovenia & Croatia	5.25%
Balkans	5.00%
Romania	4.50%
Belgium	4.25%
Denmark	4.25%
Portugal	4.25%
Finland	4.00%
Hungary	3.75%
Baltics	3.50%
Greece	3.50%
Germany	3.25%
Türkiye	3.25%
Czech Republic	3.00%
Slovakia	3.00%
Netherlands	2.75%
Norway	2.75%
Austria	2.75%
Sweden	2.75%
France	2.50%
Poland	2.50%
Spain	2.25%
Switzerland	2.25%
UK and Ireland	2.25%
Italy	1.50%

EUROPE: MAINTENANCE

Maintenance isn't aftercare. It is the moment people decide whether to keep riding.

Across Europe, **121 million people cycle less due to maintenance-related issues.**

For some, the friction goes further, leading to reduced frequency or even stopping altogether.

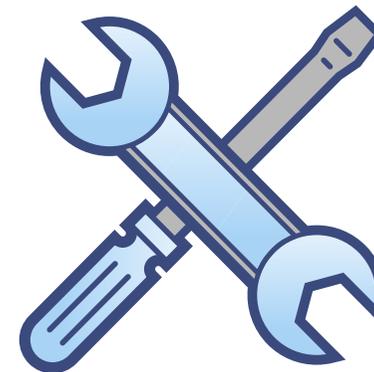
Limited access to bike shops, rising maintenance costs, and a shortage of skilled mechanics are cited as key barriers.

For the cycling industry, this is a structural risk. When keeping a bike running feels complex, expensive, or uncertain, participation erodes, regardless of infrastructure or intent.

In Europe, we see that younger people are much more likely to be impacted by barriers to maintenance. 60% of those between the ages of 18 and 34 are impacted. 40% of those who are older than 40 years old are impacted.

This means urgent action is required.

Maintenance is the moment where enthusiasm meets reality. The industry has a responsibility to protect and strengthen this point of contact, as we already see active riders turn into former riders, shrinking the base on which long-term growth, advocacy, and relevance depend.



212M

people experience barriers to maintenance

121M

people cycle less due to maintenance-related barriers

65M

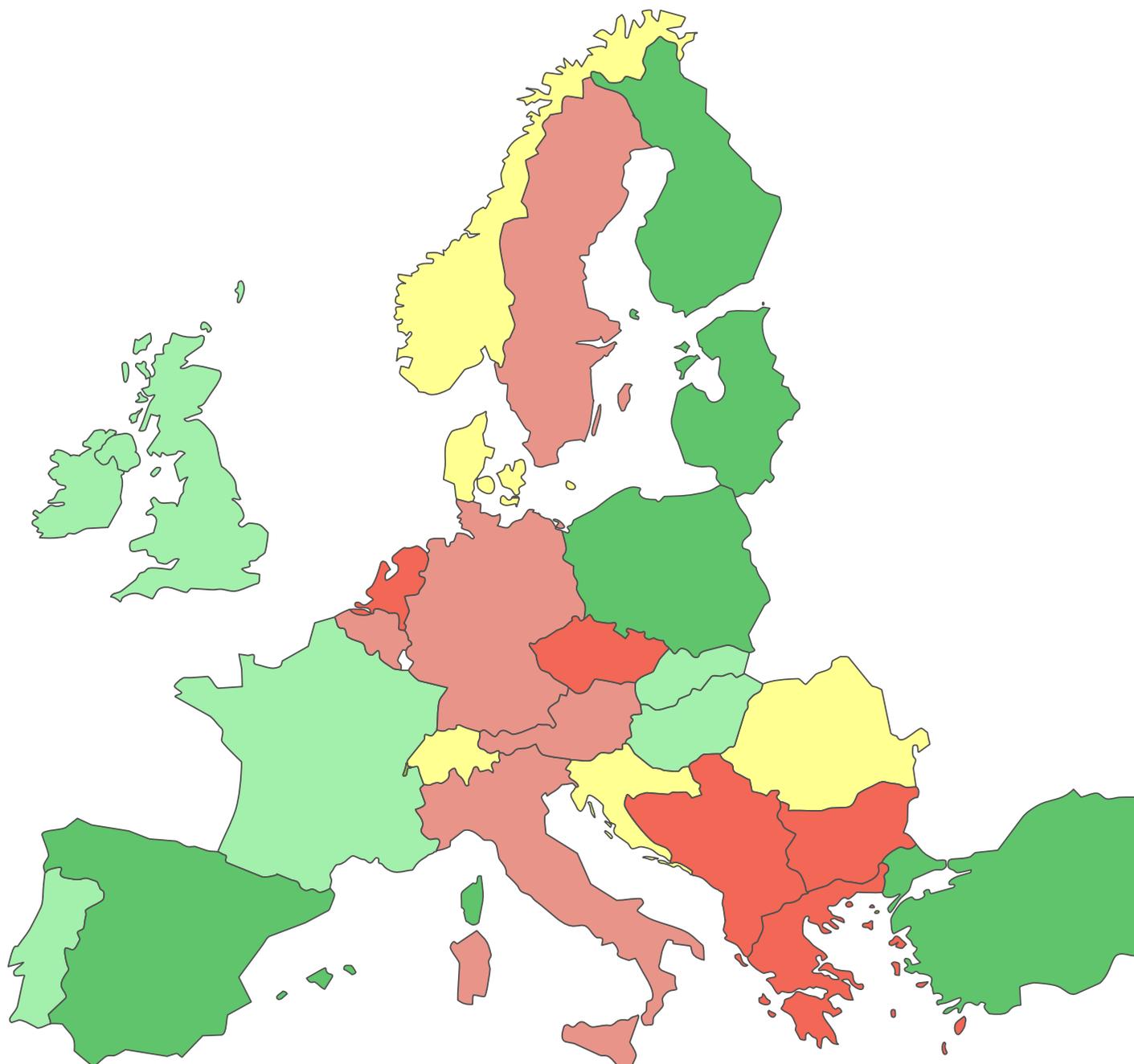
people cycle much less frequently due to these barriers

7.6M

people stopped cycling entirely due to maintenance barriers

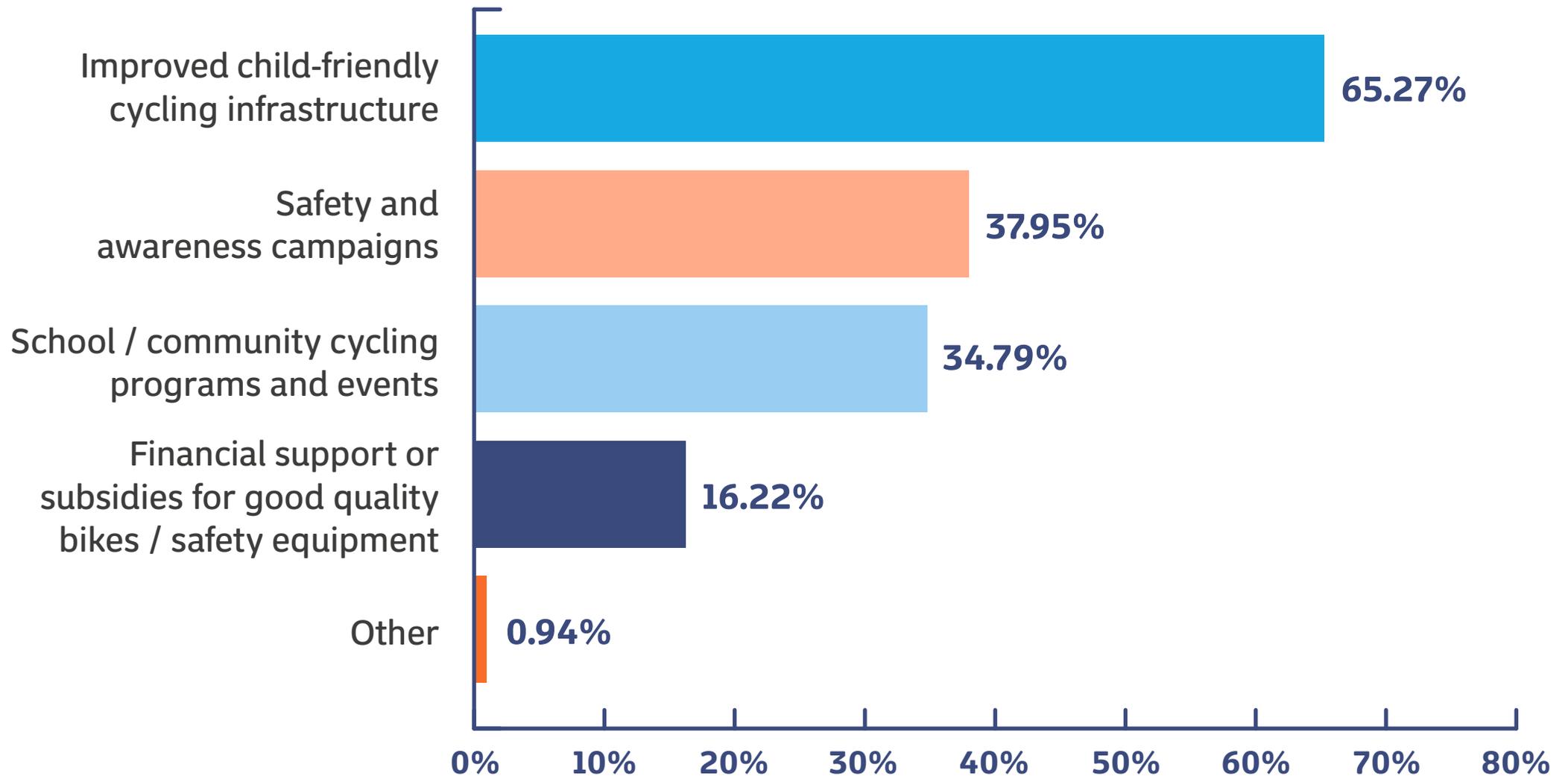
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The net percentage of people who feel it has become safer for children to cycle in their local area in the last 12 months.

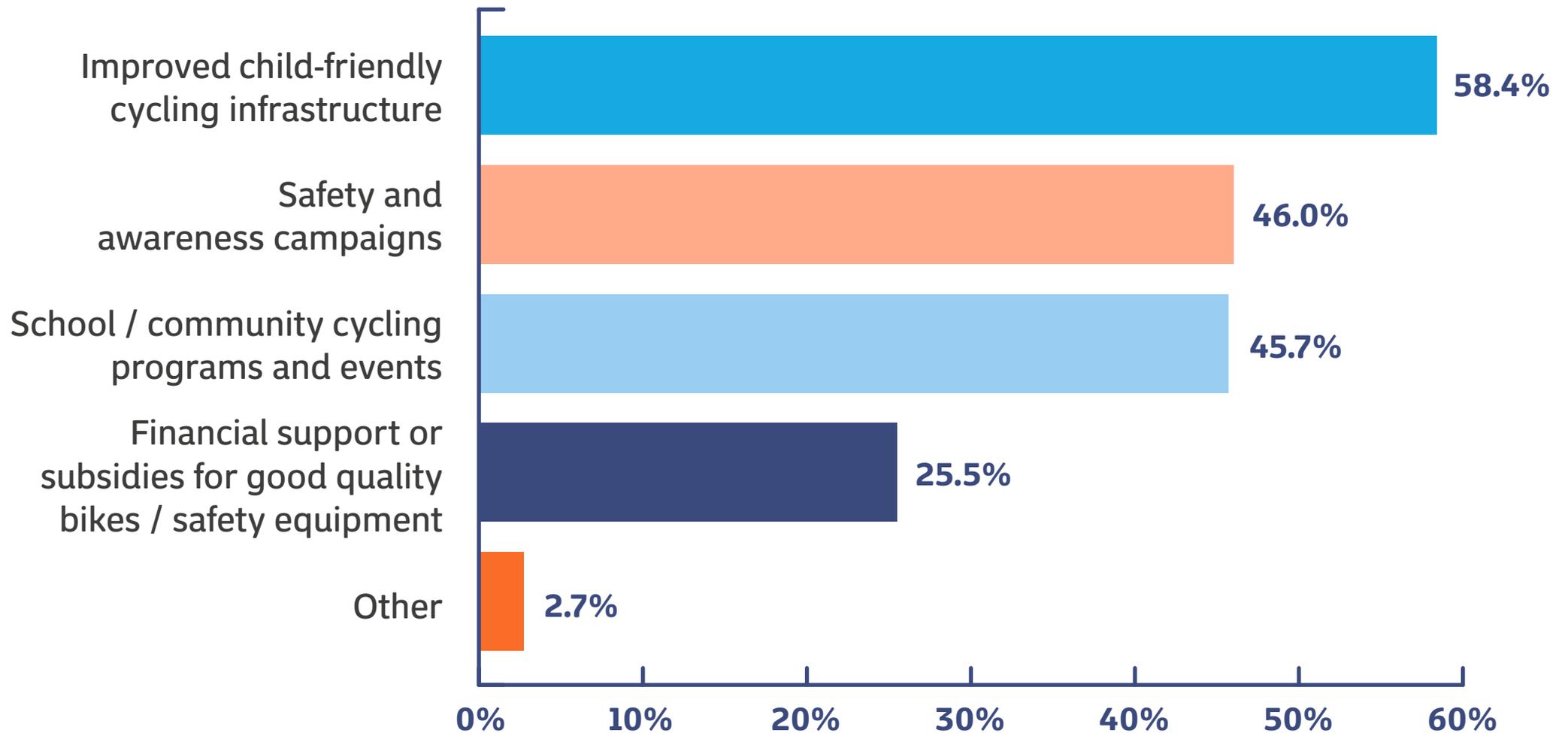


Poland	+41.04%
Baltics	+24.06%
Türkiye	+21.53%
Spain	+20.77%
Finland	+12.65%
Slovakia	+12.14%
France	+11.54%
Hungary	+10.83%
Portugal	+10.24%
UK and Ireland	+7.32%
Romania	+6.30%
Slovenia & Croatia	+5.77%
Switzerland	+5.44%
Norway	+1.01%
Denmark	+0.23%
Austria	-0.44%
Sweden	-0.84%
Germany	-1.61%
Italy	-5.45%
Belgium	-9.42%
Czech Republic	-19.52%
Netherlands	-22.67%
Balkans	-22.88%
Bulgaria	-27.16%
Greece	-28.14%

The most effective measures in making it safer for children to cycle.



Which measures should be prioritized.

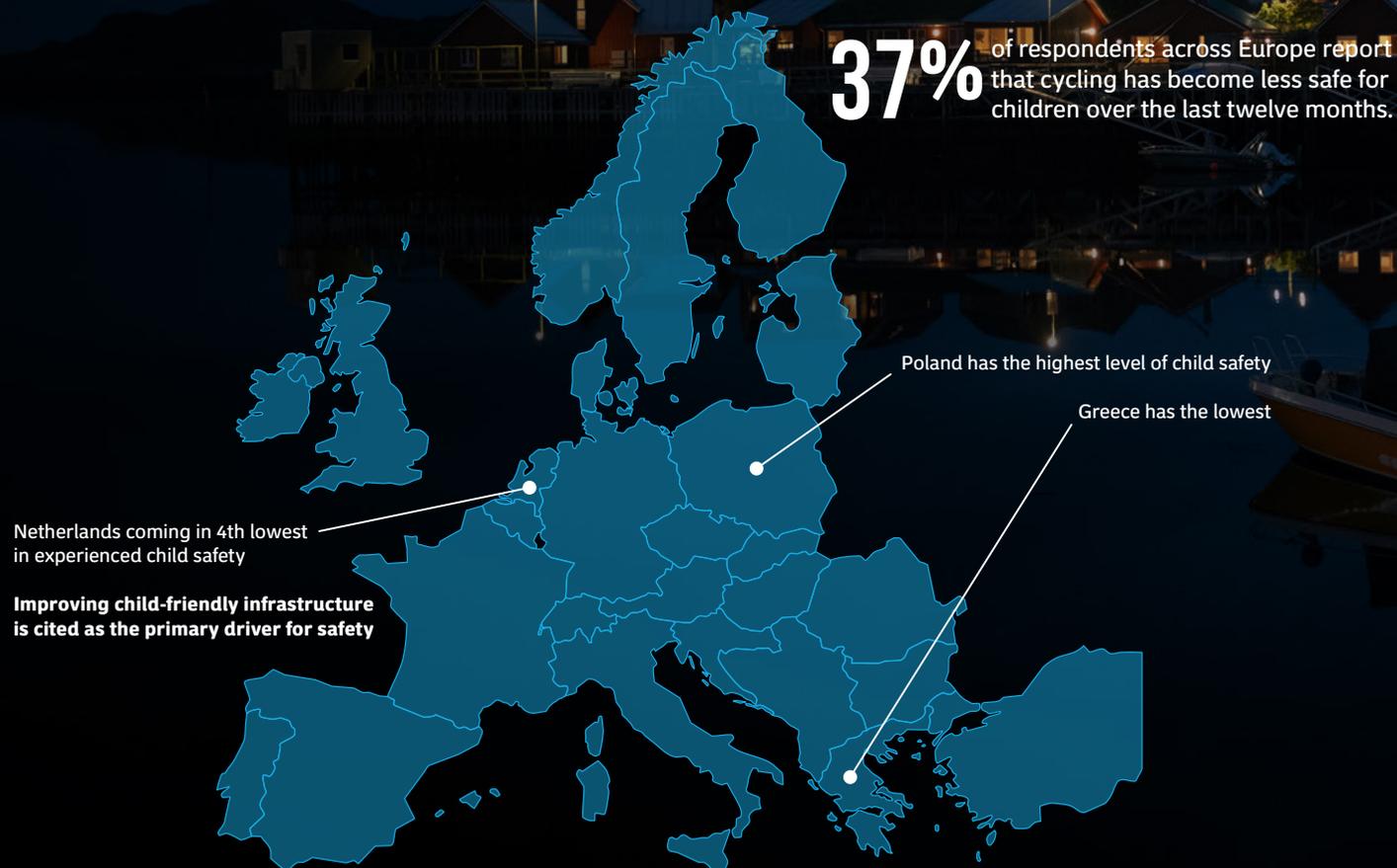


EUROPE: CHILDREN'S SAFETY IN CYCLING

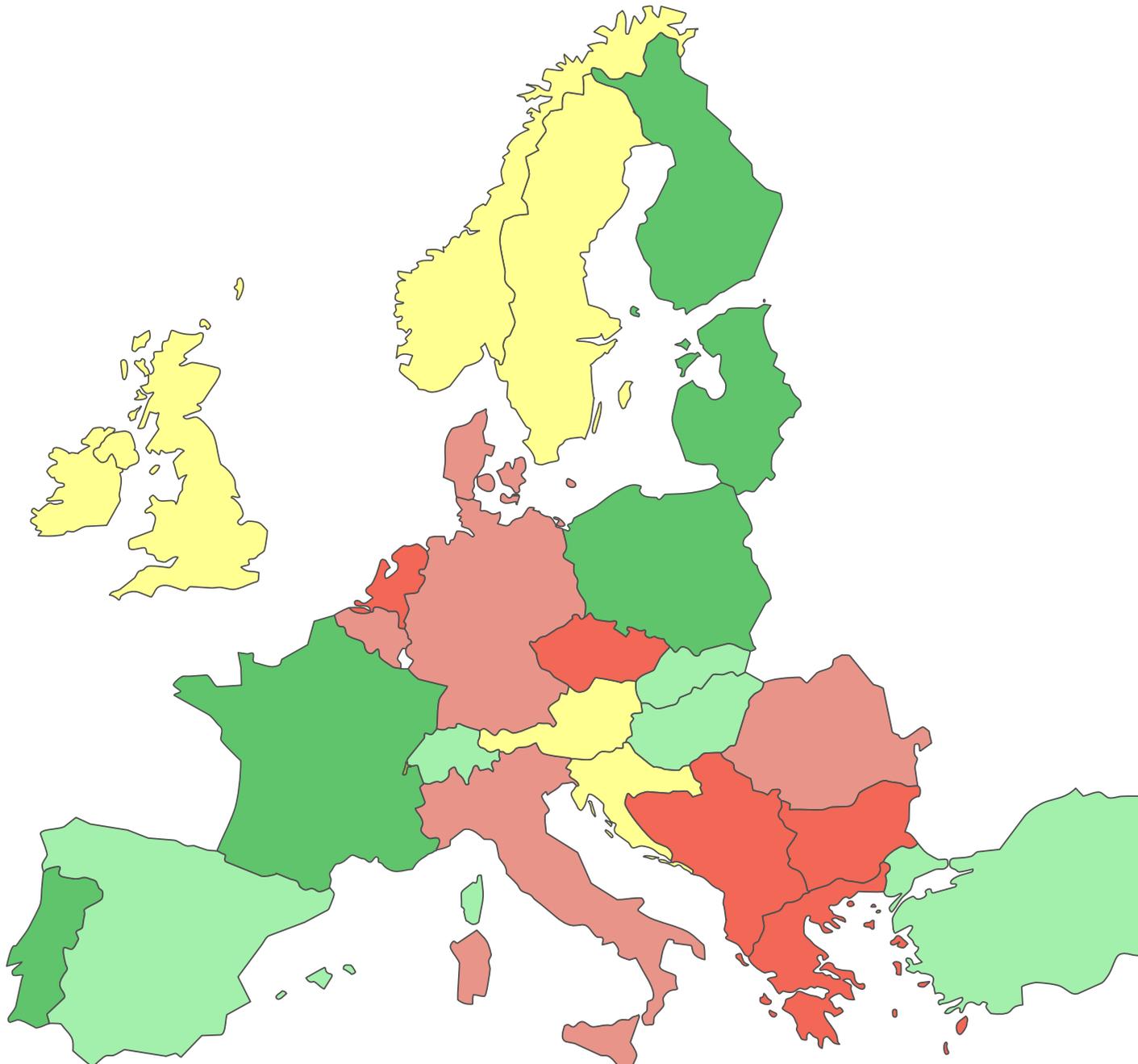
If cycling isn't safe for children, we are choosing a future that moves less, connects less, and lives less.

Across many European markets, public perception suggests that progress on children's cycling safety is stalling.

This stagnation poses a long-term risk to the cycling industry. If parents do not feel it is safe for their children to cycle, it is unlikely their children will start cycling. Children who do not feel safe cycling are less likely to develop riding habits that carry into adolescence and adulthood, reducing future participation, advocacy, and demand.



The net percentage of people who feel infrastructure has improved in the last 12 months. We asked 25,000 people about their country's bike infrastructure.



Poland	+46.67%
France	+40.18%
Finland	+33.06%
Portugal	+31.76%
Baltics	+30.46%
Spain	+29.64%
Türkiye	+28.78%
Hungary	+26.26%
Switzerland	+25.63%
Slovakia	+25.02%
Slovenia & Croatia	+24.80%
Austria	+21.09%
UK and Ireland	+18.60%
Sweden	+18.25%
Norway	+16.78%
Romania	+16.14%
Germany	+10.19%
Italy	+9.80%
Belgium	+8.88%
Denmark	+7.16%
Netherlands	+4.10%
Bulgaria	-4.73%
Balkans	-4.80%
Czech Republic	-17.80%
Greece	-18.78%

EUROPE: INFRASTRUCTURE

Infrastructure is what enables people to enjoy life by bike.

Overall, people across Europe agree that cycling infrastructure is improving.

Some of the lowest scores come from the Netherlands and Denmark, countries long regarded as cycling pioneers. This disparity reflects not failure, but expectation. In mature cycling markets, incremental progress is felt less sharply, and stagnation is more quickly perceived.

For the industry, this presents a clear risk: when leading markets lose momentum, they also lose their role as reference points for growth, innovation, and cultural leadership. If infrastructure in these countries fails to keep evolving, participation can plateau, ambition can soften, and cycling risks becoming a legacy mode rather than a dynamic driver of health, mobility, and everyday life.



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How you can support today

Building a stronger cycling ecosystem requires action now. Shimano is already investing in the future of cycling through initiatives such as NextGen Mechanics, which supports the development of skilled mechanics across Europe, and the Shimano Mechanics Championship, which elevates expertise, visibility, and pride within the profession.

Together, these programs strengthen one of the most critical links in the cycling experience: keeping people riding.

For media enquiries, partnerships, or to join the dialogue, contact advocacy@shimano-eu.com

Call for applications — State of the Nation Research Grant

Shimano invites applications for a Master-level thesis research grant focused on the themes explored in State of the Nation. The grant provides financial support for original academic research that advances understanding of cycling infrastructure, children's cycling safety, access to bike maintenance, and the conditions that enable long-term cycling participation.

We welcome proposals from students across relevant disciplines, including but not limited to urban planning, public health, mobility studies, social sciences, education, and sustainability. Research should demonstrate clear relevance to real-world cycling challenges and provide insights that can inform industry dialogue, policy discussions, or practical interventions.

Successful applicants will receive funding support and the opportunity to have their research highlighted in future *State of the Nation* outputs.

To receive more information on the grant and how to apply, please contact advocacy@shimano-eu.com

STATE OF THE NATION

The following pages present a country-by-country snapshot of how cycling is perceived across Europe.

Each overview highlights sentiment on infrastructure, children's safety, and bike maintenance, pointing to where momentum exists and where barriers remain. Together, they provide a practical reference to support local action and informed industry decision-making.

The results are weighted to reflect the population, providing a representative view of the impact. The population numbers are the number of people aged 18 to 79.

Example:

If 20% of respondents in Poland report experiencing barriers to maintenance, then roughly 5.84 million people experience them. This also means that 80% either do not experience barriers or are unsure.

AUSTRIA

THE STATE OF THE NATION

Population: 7,060,609

Sample size: 994

Own a bike: 74.2%

Ever owned a bike: 97.4%

MAINTENANCE AND MECHANICS

In Austria, 25% of respondents who experience maintenance issues will switch to other modes of transport, which is among the highest figures in Europe.



25%

CYCLING SAFETY FOR CHILDREN

34% of the population in Austria agrees that cycling has become safer for children. A low figure in comparison to the rest of Europe.



34%

CYCLING INFRASTRUCTURE

47% of people in Austria say the cycling infrastructure has improved over the last 12 months.



47%



MEN AND WOMEN

More women report cycling has become safer for children compared to men—with a difference of 17%.



AGE

People aged 65+, awareness campaigns are the most noted way to improve safe cycling. For all other age groups, community programs and improving infrastructure are preferred.



OTHER STATISTICS

64% of people aged 18-24 in Austria cycle less or much less due to maintenance barriers.

BALKAN COUNTRIES

Albania, Bosnia and Herzegovina,
Kosovo, North Macedonia, Serbia

THE STATE OF THE NATION

Population: 12,998,036

Sample size: 1012

Own a bike: 61.4%

Ever owned a bike: 91.3%

MAINTENANCE AND MECHANICS

41% of people with maintenance issues say that the lack of local bicycle shops is the most significant barrier for them, the second-highest in Europe.



41%



54%

MAINTENANCE AND MECHANICS

54% of all people experience barriers to bicycle maintenance. This is the 4th-highest rate among all countries.

MAINTENANCE AND MECHANICS

26% of people switch to other modes of transportation due to barriers to bicycle maintenance. This is the 2nd-highest in Europe.



26%

CYCLING SAFETY FOR CHILDREN

55% of people in Balkan countries disagree with the statement that cycling has become safer, the third-highest in Europe.



65%

CYCLING INFRASTRUCTURE

40% of people in the Balkan countries report that cycling infrastructure has improved. This is among the lower figures in Europe.



38%



MEN AND WOMEN

40% of people in the Balkan countries report that cycling infrastructure has improved. This is among the lower figures in Europe.



AGE

36% of people aged 18-24 had maintenance issues in Balkan countries cycled at least 50% less frequently.



OTHER STATISTICS

In Balkan countries, there is widespread mistrust of mechanics' skills. 25% of respondents who experience barriers to maintenance reported a lack of confidence in their local mechanics. The 2nd highest in Europe.

COUNTRY SPLIT

Albania	16.35%
Bosnia	23.14%
Kosovo	9.87%
North Macedonia	10.79%
Serbia	39.85%

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BALTICS

Estonia, Latvia, and Lithuania

THE STATE OF THE NATION

Population: 4,627,283

Sample size: 968

Own a bike: 64.9%

Ever owned a bike: 94.1%

MAINTENANCE AND MECHANICS

54% of people in the Baltics who own or have ever owned a bike have experienced barriers to maintaining their bike in the last few times they went to a bike shop, among the highest in Europe.



54%

CYCLING SAFETY FOR CHILDREN

51% of people in the Baltics agree that it has become safer for children to cycle in their local area over the last 12 months, ranking third in Europe.



51%

CYCLING INFRASTRUCTURE

The Baltics scored relatively high on cycling infrastructure improvement, with 55% reporting that the cycling infrastructure has improved in their local area over the last 12 months.



55%



MEN AND WOMEN

Men in the Baltics cite a lack of confidence in the shop's service quality or mechanics' skill as a barrier to maintenance twice as often as women, at 6% for women and 11% for men.



AGE

67% of people aged 65 or older say the infrastructure has recently improved. Only 45% of people between 18 and 24 say the same.



OTHER STATISTICS

24% of people from the Baltics who experienced barriers to maintenance relied more on other modes of transport. This is among the highest in Europe.

COUNTRY SPLIT

Estonia	22.3%
Latvia	30.3%
Lithuania	47.4%

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BELGIUM

THE STATE OF THE NATION

Population: 8,841,402

Sample size: 972

Own a bike: 72.2%

Ever owned a bike: 95.6%

MAINTENANCE AND MECHANICS

Maintenance issues heavily affect cycling in Belgium, with 35% of those facing barriers reducing their cycling by half or more. This accounts for 7% of the population, and 3% stop cycling altogether.

MAINTENANCE AND MECHANICS

10% of all Belgians say long waiting times at bicycle retailers are their main barrier to bicycle maintenance.

CYCLING SAFETY FOR CHILDREN

67% of Belgians agree that cycling has not become any safer or has become less safe for children over the last twelve months.

CYCLING INFRASTRUCTURE

Respondents in Belgium report a low score when asked about improvements to cycling infrastructure over the last twelve months, with 58% seeing no improvement or even a decline.



35%



10%



67%



58%



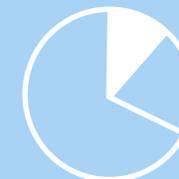
MEN AND WOMEN

Men think cycling has become safer for children, while women are less convinced. 46% of women and 39% of men disagree that it has become safer for children.



AGE

A small but notable share of answers from younger respondents, 19% in the 18-34 age group, felt financial aid to purchase high-quality cycles or safety equipment was the best way to promote safety, compared to about 10% of those 65 and older.



OTHER STATISTICS

40% of Belgians aged 18-24 who experience maintenance issues cycle at least 50% less than they did previously.

BULGARIA

THE STATE OF THE NATION

Population: 4,995,913

Sample size: 976

Own a bike: 54.1%

Ever owned a bike: 89.8%

MAINTENANCE AND MECHANICS

More than 54% of people in Bulgaria who ever owned a bike experience maintenance issues. That is in the top 3 of Europe.

MAINTENANCE AND MECHANICS

25% of Bulgarians who experienced barriers to maintenance relied more on other modes of transportation.

CYCLING SAFETY FOR CHILDREN

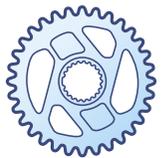
Bulgaria ranks third-lowest among European countries on whether cycling has become safer for children; only 29% said it has. While the highest percentage of people (56%) disagree with the question of whether it has become safer from all countries.

CYCLING SAFETY FOR CHILDREN

71% of Bulgarians who felt it had become safer for children to cycle attributed this to improved child-friendly infrastructure.

CYCLING INFRASTRUCTURE

Only 42% of people in Bulgaria feel that cycling infrastructure has improved over the last 12 months, ranking it among the 5 lowest countries in Europe.



54%



25%



29%



71%



58%



MEN AND WOMEN

Bulgaria is one of the few countries where percentage-wise more men than women believe school and community programs are best for child cycling safety and should be prioritized.



AGE

Around 85% of people aged 45 or older said that improved child-friendly infrastructure made cycling safer for children, while only 43% of people under 34 said so.



OTHER STATISTICS

Among Bulgarians who experience maintenance barriers, only 12% of the time this leads to delay of necessary repairs, the lowest rate among all countries.

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CZECH REPUBLIC

THE STATE OF THE NATION

Population: 8,327,763

Sample size: 1001

Own a bike: 65.5%

Ever owned a bike: 94.8%

MAINTENANCE AND MECHANICS

39% of people in the Czech Republic who experience barriers to bicycle maintenance said the lack of a local bicycle shop was one of their main barriers.

CYCLING SAFETY FOR CHILDREN

The Czech Republic ranks second-lowest among European countries on whether cycling has become safer for children; only 26% reported that it has.

CYCLING INFRASTRUCTURE

The Czech Republic reports the lowest score on cycling infrastructure improvement in Europe. Only 31% of Czechs say that the infrastructure has improved.

CYCLING INFRASTRUCTURE

The Czech Republic ranks second-to-last among all countries on the outcome of people who agree that infrastructure improved, subtracting those who disagree (score): -18%.

CYCLING INFRASTRUCTURE

69% of people aged 18 to 24 experience barriers to maintenance, while 36% of people aged 65 and older do.



39%



26%



31%



-18%



69%



MEN AND WOMEN

73% of men say child-safe infrastructure boosted safer cycling for kids, compared to 53% of women.



AGE

27% of 18-24 year-olds report subsidies to purchase high quality cycles or safety equipment as a reason for improved safety, compared to 19% of all other age groups.



OTHER STATISTICS

People in the Czech Republic have relatively high trust in their local mechanic, with the third-lowest rate of experienced barriers to finding a skilled mechanic.

DENMARK

THE STATE OF THE NATION

Population: 4,503,712

Sample size: 927

Own a bike: 72.1%

Ever owned a bike: 97.9%

MAINTENANCE AND MECHANICS

9% of all Danes cycle 50-100% less due to maintenance issues. This is by far higher than countries with a similar cycling culture in Europe.

MAINTENANCE AND MECHANICS

9% of people in Denmark who have ever owned a bike said that a lack of confidence in a mechanic's skills was their primary barrier to bicycle maintenance.

MAINTENANCE AND MECHANICS

25% of Danes relied more on other modes of transport due to maintenance barriers.

CYCLING SAFETY FOR CHILDREN

65% of people in Denmark agree that cycling has not become safer or even less safe for children in their country.

CYCLING INFRASTRUCTURE

Denmark ranks fourth-worst in Europe for recent cycling infrastructure improvements, with only 38% of Danish saying the cycling infrastructure has improved in their local area in the last 12 months.



9%



9%



25%



65%



38%



MEN AND WOMEN

The sum of agree-disagree responses on cycling infrastructure and safety for children shows a sizeable difference between men and women. Men reported that it became safer for children, with an 18% difference compared to women.



AGE

Danes under 45 are relatively more positive about financial support as a means of promoting child safety in cycling than those aged 55+.



OTHER STATISTICS

Among people ages 18-24 in Denmark, bicycle maintenance issues have the 2nd-highest impact of all countries, affecting 71% of cyclists.

FINLAND

THE STATE OF THE NATION

Population: 4,281,206

Sample size: 997

Own a bike: 75.2%

Ever owned a bike: 98.4%

MAINTENANCE AND MECHANICS

52% of people with maintenance issues cite high cost as the main reason, the highest in Europe.

MAINTENANCE AND MECHANICS

The Finns trust their mechanics. With 5% of people who ever owned a bike seeing mechanics' skills as a barrier to bike maintenance, Finland has the lowest share in Europe.

CYCLING SAFETY FOR CHILDREN

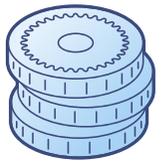
74% of people feel that cycling has become safer for children in Finland, the 2nd-highest result in Europe.

CYCLING INFRASTRUCTURE

54% of respondents in Finland report that the cycling infrastructure has improved.

CYCLING INFRASTRUCTURE

Finland ranks third-highest among all countries in the proportion of people who agree that infrastructure has improved, after subtracting those who disagree: +33% positive.



52%



5%



74%



54%



33%



MEN AND WOMEN

In Finland, men are 15% quicker to consider it safe for children to cycle than women.



AGE

Only about 35% of Fins aged 45 or older experience barriers to bicycle maintenance, while 60% of people aged 18 to 24 do.



OTHER STATISTICS

The Finns have the 2nd-highest percentage of people who have ever owned a bike among European countries.

FRANCE

THE STATE OF THE NATION

Population: 48,893,990

Sample size: 990

Own a bike: 65.4%

Ever owned a bike: 90.9%

MAINTENANCE AND MECHANICS

France is among the top 3 countries with the fewest people repairing their own bikes.



MAINTENANCE AND MECHANICS

23% of French people who experience barriers to maintenance cite long waiting times at the bike shop as the reason.



23%



MAINTENANCE AND MECHANICS

20% of respondents who face barriers to maintenance rely more on other modes of transportation as a result.

20%

CYCLING SAFETY FOR CHILDREN

58% of French respondents do not agree that cycling has become safer for children.



58%

CYCLING INFRASTRUCTURE

France ranks second-best for cycling infrastructure improvement, with 60% of respondents reporting the infrastructure in their local area has improved in the last 12 months.



60%



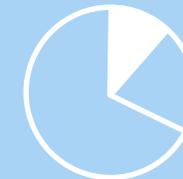
MEN AND WOMEN

In France, more men report that it has become safer for children to cycle over the last twelve months compared to men—a difference of 16%.



AGE

Young people in France (18-24 years old) who experience barriers to maintenance are far more likely to use other modes of transport than those in other parts of Europe.



OTHER STATISTICS

42% of people aged 18-24 in France who are affected by maintenance issues cycle at least 50% less frequently.

GERMANY

THE STATE OF THE NATION

Population: 63,547,259

Sample size: 975

Own a bike: 74.1%

Ever owned a bike: 96.5%

MAINTENANCE AND MECHANICS

33% of people experiencing maintenance issues cite long wait times at the bike shop as the leading cause. This is the highest percentage in Europe.

MAINTENANCE AND MECHANICS

19% of Germans who experience barriers cite a lack of confidence in the mechanic's skills as the reason.

MAINTENANCE AND MECHANICS

More than 65% of people aged 18 to 35 experience barriers to maintenance, while only 28% of people aged 65 and older do.

CYCLING SAFETY FOR CHILDREN

65% of respondents in Germany do not agree that it has become safer for children to cycle.

CYCLING INFRASTRUCTURE

Germany ranks among the worst in Europe for improving cycling infrastructure, with 41% of Germans saying that cycling infrastructure has been enhanced in their local area in the last 12 months.



33%



19%



28%



65%



41%



MEN AND WOMEN

In Germany, female respondents more often report improvements in cycling infrastructure when compared to men—a difference of 8%.



AGE

Young people (18-44 years old) cite school and community campaigns as a primary driver of improved safety, while people over 65 cite infrastructure as a key driver.



OTHER STATISTICS

School and community programs score highly in Germany, both as ways that have already made it safer for kids to cycle and as areas that should be focused on in the future.

GREECE



THE STATE OF THE NATION

Population: 7,981,677

Sample size: 1000

Own a bike: 57.8%

Ever owned a bike: 90.0%

MAINTENANCE AND MECHANICS

In Greece 26% of people who experienced barriers to maintenance barriers, delay necessary purchases this is more than in any other European country.



26%

MAINTENANCE AND MECHANICS

In Greece, 40% of respondents who experienced barriers to maintenance cite a lack of bike shops as one of the main barriers. This is the highest in Europe.



40%

CYCLING SAFETY FOR CHILDREN

58% of people disagree with the statement that cycling has become safer, the highest in Europe.



58%

CYCLING INFRASTRUCTURE

Greece ranked worst in Europe for cycling infrastructure improvements, with only 35% of respondents reporting improvements in their area over the past year.



35%



MEN AND WOMEN

17% of women in Greece never owned a bike, compared with only 3% of men.



AGE

Almost 60% of those who have ever owned a bike reported barriers to maintaining their bikes, while 33% of people aged 55 or older did so.



OTHER STATISTICS

In Greece, 74% say infrastructure should be improved to make cycling safer for children. There's little age-group difference here, unlike in most countries, where it varies.

HUNGARY

THE STATE OF THE NATION

Population: 7,459,777

Sample size: 974

Own a bike: 69.9%

Ever owned a bike: 94.0%

MAINTENANCE AND MECHANICS

53% of all people in Hungary who have ever owned a bike reported experiencing barriers to bicycle maintenance, the highest in Europe.



53%



MAINTENANCE AND MECHANICS

20% of people who experience barriers to bicycle maintenance cite a lack of confidence in a mechanic's skills.

20%

CYCLING SAFETY FOR CHILDREN

44% of respondents in Hungary say that it has become safer to cycle for children. This is relatively high when compared with the rest of Europe.



44%

CYCLING SAFETY FOR CHILDREN

52% of Hungarians say that school and community cycling programs and events should be prioritized to make cycling safer for kids. This is the most popular option.



52%

CYCLING INFRASTRUCTURE

Hungary reports 53% of respondents say cycling infrastructure improved locally over the past year.



53%



MEN AND WOMEN

In Hungary, more male respondents report improvements in children's cycling safety than women, a difference of 6%.



AGE

Among people aged 18-24 experiencing barriers to maintenance, 43% relied on other modes of transport in all cases. This is close to twice the average for this age group in Europe.



OTHER STATISTICS

46% of people in Hungary who experience barriers to maintenance cite the high cost of maintenance as a primary reason.

ITALY

THE STATE OF THE NATION

Population: 45,578,493

Sample size: 975

Own a bike: 74.4%

Ever owned a bike: 95.7%

MAINTENANCE AND MECHANICS

34% of Italians experiencing barriers to maintenance cite a lack of local bicycle shops or difficult opening hours.



34%

MAINTENANCE AND MECHANICS

28% of Italians experience barriers to maintenance due to long wait times at bicycle retailers.



28%

CYCLING SAFETY FOR CHILDREN

41% of respondents in Italy disagree that it has become safer for children to cycle.



41%

CYCLING INFRASTRUCTURE

47% of respondents in Italy report an improved infrastructure over the last twelve months.



47%



MEN AND WOMEN

6% of Italian women never owned a bike, and 2% of men.



AGE

Young people aged 18 to 24 are more likely than people aged 65 and up to cite school-based awareness programs as a primary driver of child safety in cycling.



OTHER STATISTICS

Barriers to maintenance have the least impact on how much people cycle across Europe, with around 20% cycling 50% less than they would otherwise.

THE NETHERLANDS

THE STATE OF THE NATION

Population: 13,818,527

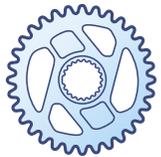
Sample size: 968

Own a bike: 91.1%

Ever owned a bike: 99.7%

MAINTENANCE AND MECHANICS

35% of respondents experienced issues with maintenance. Almost a quarter of these respondents opted for other modes of transport due to these issues.



35%



MAINTENANCE AND MECHANICS

43% of people in the 18-24 age group switch to other modes of transportation due to barriers to bicycle maintenance.

43%

CYCLING SAFETY FOR CHILDREN

The Netherlands has the lowest percentage among European countries of people who believe it has become safer for children to cycle; only 24% said it has improved.



24%

CYCLING SAFETY FOR CHILDREN

Women in the Netherlands gave the lowest safety score for children's cycling, at -34%. The score reflects those who agree that it became safer to cycle for kids, subtracting those who disagree.



-34%

CYCLING INFRASTRUCTURE

The Netherlands ranks third-worst in Europe for cycling infrastructure improvements, with just 36% reporting improvements in their area in the last year.



36%



MEN AND WOMEN

In the Netherlands, more female respondents report that cycling infrastructure has not improved than men do.



AGE

19% of respondents aged 18-24 see financial support as a primary driver of safety. For people over 65, this number drops to 11%.



OTHER STATISTICS

64% of people aged 18 to 24 who own a bike report a maintenance barrier, which is among the highest in Europe. Of these people, 34% report cycling at least 50% less.

NORWAY

THE STATE OF THE NATION

Population: 4,215,584

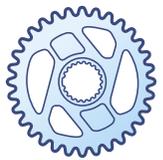
Sample size: 961

Own a bike: 67%

Ever owned a bike: 97.1%

MAINTENANCE AND MECHANICS

8% of respondents who experienced barriers to maintenance stopped cycling altogether as a result, which is almost 2% of the population.



8%

MAINTENANCE AND MECHANICS

30% of Norwegians who experience barriers to maintenance say it's due to a lack of local bicycle shops or difficult opening hours



30%

MAINTENANCE AND MECHANICS

23% of Norwegians who experience barriers to maintenance say they delayed necessary repairs.



23%

CYCLING SAFETY FOR CHILDREN

42% of Norwegians believe that schools and community programs should be prioritized to encourage children to cycle safely.



42%

CYCLING INFRASTRUCTURE

43% of respondents in Norway report that the infrastructure has improved.



43%



MEN AND WOMEN

In Norway, more male respondents reported improvements in children's safety compared to women—a difference of 6%.



AGE

Around 55% of Norwegians under 44 experience barriers to maintaining their bikes, while "only" 32% of Norwegians over 55 do.



OTHER STATISTICS

Relatively few people in Norway (15%) who experience barriers to maintenance cite a lack of skilled mechanics as a primary reason. This indicates a higher level of trust than in most other European countries.

SHIMANO

POLAND



THE STATE OF THE NATION

Population: 29,136,429

Sample size: 999

Own a bike: 79.3%

Ever owned a bike: 96.0%

MAINTENANCE AND MECHANICS

49% of people in Poland who own or have ever owned a bike say the main barrier to maintaining their bike is the high cost, which is among the highest in Europe.

MAINTENANCE AND MECHANICS

50% of people aged 18-24 experience barriers to the maintenance cycle, with a minimal impact of cycling 50% less frequently or worse. This is the highest in Europe.

MAINTENANCE AND MECHANICS

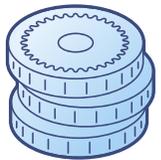
19% of Poles who face barriers to bicycle maintenance cite a lack of confidence in the shop's service quality and mechanics' skills, among the highest in Europe.

CYCLING SAFETY FOR CHILDREN

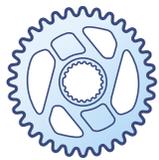
60% of respondents believe children's cycling safety improved in their area last year, the highest among the surveyed countries.

CYCLING INFRASTRUCTURE

Poland scores best on cycling infrastructure, with 67% of respondents saying that the cycling infrastructure has improved in their local area in the last 12 months.



49%



50%



19%



60%



67%



MEN AND WOMEN

Only 1% of Polish men and 6% of women have never owned a bike.



AGE

82% of respondents aged 65+ say that infrastructure was the reason cycling for kids became safer, while only 55% of respondents aged 18-24 said the same.



OTHER STATISTICS

In addition to the high cost of bike maintenance, 29% of Polish who experience barriers cite long waiting times at bike shops as a primary reason.

PORTUGAL

THE STATE OF THE NATION

Population: 8,311,559

Sample size: 983

Own a bike: 55.9%

Ever owned a bike: 89.5%

MAINTENANCE AND MECHANICS

In Portugal, 41% of people facing barriers to maintenance cite the absence of local bicycle shops or their limited opening hours as a reason, ranking it third-highest among European countries.



41%



16%



46%



78%



59%

MAINTENANCE AND MECHANICS

Only 16% of people who experience barriers to bicycle maintenance cite long waiting times as the reason, the lowest among all countries.

CYCLING SAFETY FOR CHILDREN

In Portugal, 46% of people believe it has become safer for children to cycle, which is a notably high proportion.

CYCLING SAFETY FOR CHILDREN

78% of Portuguese respondents said that improvements to child-friendly infrastructure were the reason for safer cycling for kids.

CYCLING INFRASTRUCTURE

Portugal is ranked fourth in cycling infrastructure improvements, with 59% reporting improvements in their local cycling facilities over the past year.



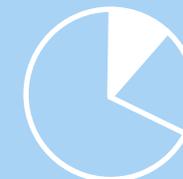
MEN AND WOMEN

6% of men in Portugal have never had a bike, while 15% of women have never had a bike.



AGE

Younger people are more affected by maintenance issues than older people. The age group between 18 and 24 is affected 56% of the time, while everyone older than 45 is affected just above 40% of the time.



OTHER STATISTICS

18% of Portuguese relied more on other modes of transport due to barriers to bicycle maintenance. This is among the lowest in Europe.

ROMANIA

THE STATE OF THE NATION

Population: 14,515,455

Sample size: 977

Own a bike: 60%

Ever owned a bike: 88.2%

MAINTENANCE AND MECHANICS

Romania's maintenance issues affect 56% of the population, the second-highest rate among European countries.



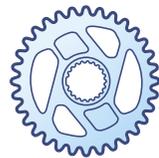
56%



MAINTENANCE AND MECHANICS

42% of people with barriers cite a lack of local bicycle shops or difficult opening hours as the reason, the highest of all countries.

42%



MAINTENANCE AND MECHANICS

23% of people with barriers to maintenance cite a lack of confidence in the shop's service quality and mechanics' skills, among the highest in Europe.

23%



CYCLING SAFETY FOR CHILDREN

47% of people in Romania believe it has become safer for children to cycle, ranking fifth-highest in Europe.

47%



CYCLING INFRASTRUCTURE

Romania ranks high in cycling infrastructure improvements, with 52% reporting improvements in their local area over the past year.

52%



MEN AND WOMEN

18% of women in Romania never owned a bike, compared with only 6% of men.



AGE

More than 80% of people over 45 said that child-friendly infrastructure made cycling safer for children. 57% of people in the youngest age group, 18-24, said the same.



OTHER STATISTICS

40% of people in Romania who experience barriers to maintenance cite the high cost as a primary reason.

SLOVAKIA



THE STATE OF THE NATION

Population: 4,202,096

Sample size: 981

Own a bike: 74.4%

Ever owned a bike: 96.2%

MAINTENANCE AND MECHANICS

In Slovakia, over 2% of the population has stopped cycling entirely due to maintenance barriers.



2%

MAINTENANCE AND MECHANICS

26% of people who experienced barriers cited long waiting times at a bike shop as the reason.



26%

CYCLING SAFETY FOR CHILDREN

72% of people who reported cycling became safer for kids attributed this to child-friendly cycling infrastructure.



72%

CYCLING INFRASTRUCTURE

52% of respondents in Slovakia report that the local cycling infrastructure has improved over the past twelve months, ranking relatively high in Europe.



52%

CYCLING INFRASTRUCTURE

Only 27% of people disagreed that cycling infrastructure had improved over the last year.



27%



MEN AND WOMEN

In Slovakia, more male respondents report improvements in children's safety than women—a difference of 8%



AGE

Individuals aged 18 to 24 face the highest barriers to maintenance in Europe, with 71%.



OTHER STATISTICS

32% of people in Slovakia who experience barriers to maintenance cite the lack of local bike shops as a primary reason.

SLOVENIA & CROATIA

THE STATE OF THE NATION

Population: 4,620,705

Sample size: 1001

Own a bike: 73.1%

Ever owned a bike: 94.9%

MAINTENANCE AND MECHANICS

38% of those experiencing barriers to maintenance say that's due to a lack of local bicycle shops or difficult opening hours.



38%

MAINTENANCE AND MECHANICS

27% of people in Slovenia and Croatia who experienced barriers to maintenance relied more on other modes of transport. This is the highest among all European countries.



27%

CYCLING SAFETY FOR CHILDREN

43% of people in Slovenia and Croatia believe it has become safer for children to cycle over the last twelve months.



43%

CYCLING INFRASTRUCTURE

Slovenia and Croatia see notable improvements in cycling infrastructure, with 54% of respondents noting local enhancements over the past year.



54%



MEN AND WOMEN

In Slovenia and Croatia, more male respondents reported improvements in children's safety than women—a difference of 12%.



AGE

65% of people aged 18-24 have been affected by maintenance barriers.



OTHER STATISTICS

Among those in Slovenia and Croatia whose cycling frequency was affected by maintenance barriers, 10% stopped cycling altogether. This is the highest rate in Europe.

COUNTRY SPLIT

Croatia	64.7%
Slovenia	35.3%

SPAIN

THE STATE OF THE NATION

Population: 38,195,7766

Sample size: 991

Own a bike: 62.2%

Ever owned a bike: 91.6%

MAINTENANCE AND MECHANICS

24% of people with barriers say that's due to long waiting times at a bicycle retailer.



24%

MAINTENANCE AND MECHANICS

60% of people under the age of 34 experience barriers to maintenance, while 33% of people over 45 do.



60%

CYCLING SAFETY FOR CHILDREN

50% of respondents in Spain agree that it has become safer for children to cycle in their local area over the past 12 months, making it the fourth-best among all countries.



50%

CYCLING INFRASTRUCTURE

57% of respondents indicate that their local cycling infrastructure has improved over the past year.



57%



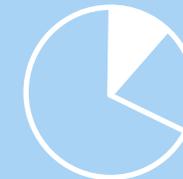
MEN AND WOMEN

Please add: 11,9% of women in Spain never owned a bike, compared to only 4,8% of men



AGE

In relation to safety, older respondents are relatively more likely to prefer awareness campaigns and infrastructure while younger respondents prefer financial support.



OTHER STATISTICS

37% of all individuals facing barriers cite the absence of nearby bicycle shops or limited opening hours as the reason.

SWEDEN

THE STATE OF THE NATION

Population: 7,788,5526

Sample size: 983

Own a bike: 78.6%

Ever owned a bike: 98.0%

MAINTENANCE AND MECHANICS

Sweden is among the top 3 countries where people most often repair their own bikes due to maintenance barriers.



MAINTENANCE AND MECHANICS

23% of people who experience barriers to maintenance cite long wait times at a bicycle retailer as the reason.



23%

MAINTENANCE AND MECHANICS

Sweden and Finland are among the top 3 countries where people most often repair their own bikes, due to barriers to maintenance.



CYCLING SAFETY FOR CHILDREN

67% of people in Sweden do not agree that it has become safer for children to cycle. This is among the lowest in Europe.



67%

CYCLING INFRASTRUCTURE

44% of respondents in Sweden report that the infrastructure has improved over the last twelve months.



44%



MEN AND WOMEN

In Sweden, more female respondents reported no improvement in children's safety than men—a difference of 19%.



AGE

67% of people aged 18-24 experience barriers to maintenance, the highest in Europe. Among those 65 and older, only 25% experience barriers.



OTHER STATISTICS

98% of people in Sweden have owned a bike at some point in their life, which is the 3rd-highest in Europe.

SWITZERLAND

THE STATE OF THE NATION

Population: 6,911,283

Sample size: 980

Own a bike: 69.8%

Ever owned a bike: 95.1%

MAINTENANCE AND MECHANICS

52% of people in Switzerland with maintenance issues report that it's due to high costs. This is the highest in Europe.



52%

MAINTENANCE AND MECHANICS

25% of people with barriers say they delayed necessary repairs. This is the 2nd-highest rate among all European countries.



25%

CYCLING SAFETY FOR CHILDREN

School and community cycling programs are reported to be one of the primary drivers in making Switzerland a safer place for children to cycle, by 44%. One of the highest European rankings.



44%

CYCLING INFRASTRUCTURE

48% of respondents in Switzerland report that the infrastructure has improved over the last twelve months.



48%



MEN AND WOMEN

In Switzerland, more male respondents reported improvements in children's safety compared to women—a difference of 9%.



AGE

Only 21% of people older than 65+ experience barriers to maintenance, while more than 60% of people in the groups below the age of 34 experience these barriers.



OTHER STATISTICS

28% of those who experience barriers to maintenance cite long wait times at a bicycle retailer as the reason.

TÜRKIYE

THE STATE OF THE NATION

Population: 62,338,238

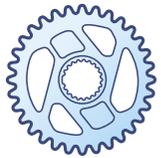
Sample size: 951

Own a bike: 65.9%

Ever owned a bike: 90.8%

MAINTENANCE AND MECHANICS

In Türkiye, 56% of people experience maintenance issues, the highest in Europe.



56%

MAINTENANCE AND MECHANICS

33% of those who face barriers to maintenance cite long wait times at a bicycle retailer as the reason. This is the highest in Europe.



33%

MAINTENANCE AND MECHANICS

27% of people with barriers say this's due to a lack of confidence in the shop's service quality and the mechanics' skills. This is the highest in Europe.



27%

CYCLING SAFETY FOR CHILDREN

55% of Turkish respondents agree that it has become safer for children to cycle in their local area over the past 12 months, the second-highest in Europe.



55%

CYCLING INFRASTRUCTURE

Türkiye ranks third in cycling infrastructure improvements, with 60% of respondents reporting that infrastructure in their local area has improved in the last 12 months.



60%



MEN AND WOMEN

Men and Women: while in most countries we see a difference, men and women in Türkiye have very similar opinions of children safety and infrastructure developments.



AGE

Türkiye ranks third-highest in barriers to maintenance among people aged 18-24 across Europe, with 70%.



OTHER STATISTICS

48% of people in Türkiye report a high costs as a primary barrier to maintenance, the highest score in Europe.

UK AND IRELAND

THE STATE OF THE NATION

Population: 54,682,360

Sample size: 989

Own a bike: 48.5%

Ever owned a bike: 87.0%

MAINTENANCE AND MECHANICS

With 41% of people experiencing barriers to maintenance, the Republic of Ireland and the UK rank among the top in Europe for maintenance and mechanics.



41%



25%

MAINTENANCE AND MECHANICS

25% of people with barriers say this is due to a lack of confidence in the shop's service quality or the mechanics' skills.

MAINTENANCE AND MECHANICS

36% of people with barriers say that's due to a lack of local bicycle shops or difficult opening hours, among the highest in Europe.



36%

CYCLING SAFETY FOR CHILDREN

70% of respondents cite the improved infrastructure as the main reason it has become safer for children to cycle in the Republic of Ireland and the UK.



70%

CYCLING INFRASTRUCTURE

47% of respondents report that the infrastructure in the Republic of Ireland and the UK has improved.



47%



MEN AND WOMEN

In the Republic of Ireland and the UK, more female respondents reported no improvements in children's safety than men—a difference of 9%.



AGE

Around 60% of people under 34 experience barriers to maintaining their bicycles, while only about 20% of people aged 65+ do.



OTHER STATISTICS

27% of people in Ireland and the UK who experience barriers to maintenance cite the long waiting times at bike shops as a primary reason.

COUNTRY SPLIT

Scotland	7.7%
Wales	4.3%
Northern Ireland	2.6%
Ireland	7.3%
England	78.2%

How did we do it?

We ran an online questionnaire in people's own language. The survey was designed and analyzed by Shimano Europe's Customer Insights & Research team. The length of the survey was about 10 minutes.

Who took part?

Participants came from 25 different countries or regions. Our goal was 1,000 completed responses per country, so we invited about 1,050 people per country to allow for optimizing response quality, for example, by removing rushed, ambiguous, or unclear answers. In total, this resulted in 25,000 respondents.

The sample was nationally representative of adults aged 18 to 79, using quotas based on age and gender. These quotas were built using the latest data from local statistical offices.

How did we ensure fairness and representativeness?

We applied weights to the sample so that it matched the real population distribution of age and gender in each country. This means each respondent's influence reflects real-world demographics, making the results more accurate and generalizable.

What does "nationally representative" mean?

A nationally representative sample means the sample's structure mirrors the country's population. For example:

- The ratio of men to women matches national proportions.
- The percentage in each age group matches national proportions.

Here's an example:

- In the Netherlands, 5.9% of the adult population are men aged 18–24 (source: CBS - Centraal Bureau voor de Statistiek).
- If we want 1,000 respondents for the Netherlands, we need $5.9\% \times 1,000 = 59$ men aged 18–24.
- Once 59 men in that age group have responded, the quota is "full," and no more men aged 18–24 from the Netherlands can enter the survey.
- After cleaning the data, if we only have 50 men left aged 18–24, each of these respondents from the Netherlands will receive a weighting factor of 1.18 (calculated as $59 \div 50$).

We apply this method for every gender/age combination, in each country/region, based on demographic data.

When did it all happen?

The survey was live from September 4 to September 29, 2025.



STATE OF THE NATION
SHIMANO EUROPE

RAW DATA

SAMPLE

Sample not weighted	Austria	Balkan	Baltics	Belgium	Bulgaria	Czech Republic	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Romania	Slovakia	Slovenia & Croatia	Spain	Sweden	Switzerland	Türkiye	UK and Ireland	Grand Total
Female	514	518	514	491	506	517	461	509	512	493	510	507	504	494	486	520	510	496	506	506	505	493	488	473	507	12540
18-24	47	54	49	50	46	50	51	49	55	46	49	43	45	57	59	40	48	49	47	52	48	49	47	68	53	1251
25-34	86	89	83	79	63	78	81	80	77	75	77	75	66	80	88	75	71	71	84	78	72	86	84	99	87	1984
35-44	92	101	100	84	94	99	64	85	85	78	100	89	74	77	96	106	83	87	102	98	85	85	93	100	90	2247
45-54	87	107	100	84	108	111	81	78	89	79	119	105	99	83	99	96	102	100	100	102	105	82	86	90	86	2378
55-64	101	111	113	89	102	92	85	90	91	105	119	81	104	90	86	83	94	88	101	104	94	83	91	70	90	2357
65-79	101	56	69	105	93	87	99	127	115	110	46	114	116	107	58	120	112	101	72	72	101	108	87	46	101	2323
Male	480	494	454	481	470	484	466	488	478	482	490	467	471	474	475	479	473	481	475	495	486	490	492	478	482	11985
18-24	46	56	38	53	38	47	55	48	54	47	48	47	43	54	53	42	46	48	44	49	50	49	46	71	52	1224
25-34	85	86	79	82	57	74	90	81	71	74	71	78	66	79	86	77	74	69	81	81	70	88	86	104	83	1972
35-44	83	91	99	83	89	92	76	88	82	81	89	85	74	69	90	102	78	93	105	97	82	85	95	101	87	2196
45-54	85	96	88	84	101	109	86	78	85	81	104	108	92	82	85	95	92	102	104	100	105	85	90	84	84	2305
55-64	97	100	88	86	95	78	72	85	84	101	93	79	92	90	85	75	88	80	86	101	91	84	93	67	85	2175
65-79	84	65	62	93	90	84	87	108	102	98	85	70	104	100	76	88	95	89	55	67	88	99	82	51	91	2113
Grand Total	994	1012	968	972	976	1001	927	997	990	975	1000	974	975	968	961	999	983	977	981	1001	991	983	980	951	989	24525

Weighted	Austria	Balkan	Baltics	Belgium	Bulgaria	Czech Republic	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Romania	Slovakia	Slovenia & Croatia	Spain	Sweden	Switzerland	Türkiye	UK and Ireland	Grand Total
Female	504	512	525	504	516	506	500	500	513	501	507	514	506	501	493	515	519	511	508	502	506	494	499	500	510	12666
18-24	47	51	44	54	40	46	56	50	55	45	45	47	44	57	54	42	46	47	43	43	48	52	45	70	55	1226
25-34	83	82	74	85	60	71	89	81	79	77	65	76	66	86	89	76	71	69	79	70	72	87	85	102	91	1965
35-44	89	88	91	88	84	89	77	85	88	86	87	85	76	81	88	103	83	89	98	85	86	88	94	102	93	2203
45-54	87	91	92	85	97	105	85	77	87	81	100	103	99	82	85	95	101	101	96	88	105	83	89	91	87	2292
55-64	99	92	100	88	94	79	88	84	88	103	96	81	104	90	81	79	96	85	83	94	94	81	91	71	88	2229
65-79	99	108	124	104	141	116	105	123	116	109	114	122	117	105	96	120	122	120	109	122	101	103	95	64	96	2751
Male	496	488	475	496	484	494	500	500	487	499	493	486	494	499	507	485	481	489	492	498	494	506	501	500	490	12334
18-24	50	53	45	56	43	47	59	53	58	49	49	49	48	59	57	44	48	50	45	48	51	56	50	74	58	1299
25-34	89	84	80	86	63	75	92	87	78	84	70	81	71	88	93	78	74	74	82	78	75	92	89	105	88	2056
35-44	90	89	100	87	90	93	80	90	84	89	88	90	77	82	92	105	80	95	104	92	86	92	96	104	88	2263
45-54	85	87	89	86	101	108	85	80	85	80	99	106	97	81	89	95	93	104	100	91	105	85	89	92	84	2296
55-64	97	87	84	88	88	78	87	82	84	102	89	75	99	90	84	73	85	80	79	89	90	83	91	70	84	2138
65-79	85	88	77	93	99	93	97	108	98	95	98	85	102	99	92	90	101	86	82	100	87	98	86	55	88	2282
Grand Total	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	25000

Weighting Factor	Austria	Balkan	Baltics	Belgium	Bulgaria	Czech Republic	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Romania	Slovakia	Slovenia & Croatia	Spain	Sweden	Switzerland	Türkiye	UK and Ireland	Grand Total
Female	0.98	0.99	1.02	1.03	1.02	0.98	1.08	0.98	1.00	1.02	0.99	1.01	1.00	1.01	1.01	0.99	1.02	1.03	1.00	0.99	1.00	1.00	1.02	1.06	1.01	1.01
18-24	1.00	0.94	0.90	1.08	0.87	0.92	1.10	1.02	1.00	0.98	0.92	1.09	0.98	1.00	0.92	1.05	0.96	0.91	0.83	0.83	1.00	1.06	0.96	1.03	1.04	0.98
25-34	0.97	0.92	0.89	1.08	0.95	0.91	1.10	1.01	1.03	1.03	0.84	1.01	1.00	1.08	1.01	1.01	1.00	0.97	0.94	0.90	1.00	1.01	1.01	1.03	1.05	0.99
35-44	0.97	0.87	0.91	1.05	0.89	0.90	1.20	1.00	1.04	1.10	0.87	0.96	1.03	1.05	0.92	0.97	1.00	1.02	0.96	0.87	1.01	1.04	1.01	1.02	1.03	0.98
45-54	1.00	0.85	0.92	1.01	0.90	0.95	1.05	0.99	0.98	1.03	0.84	0.98	1.00	0.99	0.86	0.99	0.99	1.01	0.96	0.86	1.00	1.01	1.03	1.01	1.01	0.96
55-64	0.98	0.83	0.88	0.99	0.92	0.86	1.04	0.93	0.97	0.98	0.81	1.00	1.00	1.00	0.94	0.95	1.02	0.97	0.82	0.90	1.00	0.98	1.00	1.01	0.98	0.95
65-79	0.98	1.93	1.80	0.99	1.52	1.33	1.06	0.97	1.01	0.99	2.48	1.07	1.01	0.98	1.66	1.00	1.09	1.19	1.51	1.69	1.00	0.95	1.09	1.39	0.95	1.18
Male	1.03	0.99	1.05	1.03	1.03	1.02	1.07	1.02	1.02	1.04	1.01	1.04	1.05	1.05	1.07	1.01	1.02	1.02	1.04	1.01	1.02	1.03	1.02	1.05	1.02	1.03
18-24	1.09	0.95	1.18	1.06	1.13	1.00	1.07	1.10	1.07	1.04	1.02	1.04	1.12	1.09	1.08	1.05	1.04	1.04	1.02	0.98	1.02	1.14	1.09	1.04	1.12	1.06
25-34	1.05	0.98	1.01	1.05	1.11	1.01	1.02	1.07	1.10	1.14	0.99	1.04	1.08	1.11	1.08	1.01	1.00	1.07	1.01	0.96	1.07	1.05	1.03	1.01	1.06	1.04
35-44	1.08	0.98	1.01	1.05	1.01	1.01	1.05	1.02	1.02	1.10	0.99	1.06	1.04	1.19	1.02	1.03	1.03	1.02	0.99	0.95	1.05	1.08	1.01	1.03	1.01	1.03
45-54	1.00	0.91	1.01	1.02	1.00	0.99	0.99	1.03	1.00	0.99	0.95	0.98	1.05	0.99	1.05	1.00	1.01	1.02	0.96	0.91	1.00	1.00	0.99	1.10	1.00	1.00
55-64	1.00	0.87	0.95	1.02	0.93	1.00	1.21	0.96	1.00	1.01	0.96	0.95	1.08	1.00	0.99	0.97	0.97	1.00	0.92	0.88	0.99	0.99	0.98	1.04	0.99	0.98
65-79	1.01	1.35	1.24	1.00	1.10	1.11	1.11	1.00	0.96	0.97	1.15	1.21	0.98	0.99	1.21	1.02	1.06	0.97	1.49	1.49	0.99	0.99	1.05	1.08	0.97	1.08
Grand Total	1.01	0.99	1.03	1.03	1.02	1.00	1.08	1.00	1.01	1.03	1.00	1.03	1.03	1.03	1.04	1.00	1.02	1.02	1.02	1.00	1.01	1.02	1.02	1.05	1.01	1.02

* Almost all weight factors are close to 1; meaning: Sample is already very representative of the population. Weighting did have little effect on the final results because there is no major over- or underrepresentation. The impact of (re)weighting is minimal.

BIKE OWNAGE (EVER)

Weighted	Austria	Balkan	Baltics	Belgium	Bulgaria	Czech Republic	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Romania	Slovakia	Slovenia & Croatia	Spain	Sweden	Switzerland	Türkiye	UK and Ireland	Grand Total
Ever had a bike	974.07	912.51	941.23	956.43	898.38	948.05	979.04	984.13	908.91	964.74	899.90	940.36	957.43	996.90	971.18	960.31	894.66	881.76	962.22	949.03	916.06	980.38	950.54	908.39	869.55	23506.15
Own a bike now	741.49	613.59	648.88	722.24	540.90	655.41	720.52	751.45	654.42	741.32	578.11	699.27	747.37	910.70	669.66	792.93	559.42	600.37	743.77	731.38	621.60	786.08	697.60	658.88	485.36	17072.73
Grand Total	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	25000

Weighted	Gender		Age Groups						Ever Owned a Bike		Own a Bike Now		Grand Total
	Female	Male	18-24	25-34	35-44	45-54	55-64	65-79	No	Yes	FALSE	TRUE	
Ever Had a Bike	11594.15	11912.00	2452.80	3859.81	4258.24	4375.27	4076.40	4483.63		23506.15	6433.42	17072.73	23506.15
Own a Bike Now	7998.50	9074.23	1910.44	3073.53	3365.81	3280.29	2785.62	2657.04		17072.73		17072.73	17072.73
Grand Total	12666.00	12334.00	2525.00	4021.00	4466.00	4588.00	4367.00	5033.00	1493.85	23506.15	7927.27	17072.73	25000

CYCLING INFRASTRUCTURE IMPROVED

Weighted	Austria	Balkan	Baltics	Belgium	Bulgaria	Czech Republic	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Romania	Slovakia	Slovenia & Croatia	Spain	Sweden	Switzerland	Türkiye	UK and Ireland	Grand Total
Don't know	271.72	150.85	212.02	249.28	121.03	202.22	313.29	258.23	203.19	276.86	117.22	207.89	157.55	315.77	305.73	135.15	133.48	115.76	210.07	164.00	159.30	304.43	292.38	99.94	241.03	5218.40
Strongly agree	1071.6	104.88	132.33	73.47	75.10	109.14	66.20	109.30	122.56	85.99	49.00	136.05	90.71	82.56	92.44	206.40	113.87	131.73	103.29	142.11	150.38	79.74	103.78	222.23	113.51	2803.95
Tend to agree	362.42	295.70	413.95	346.27	340.72	200.74	315.20	426.87	476.76	326.50	298.51	391.29	379.50	280.06	338.57	464.39	478.19	391.08	416.76	399.88	418.18	359.30	378.17	371.68	358.98	9229.67
Tend to disagree	188.37	185.19	163.11	231.70	258.06	412.25	199.70	135.41	148.45	237.10	306.03	162.88	247.45	223.58	168.30	141.70	191.54	207.10	169.80	173.49	187.50	178.43	186.48	165.43	207.88	5076.90
Strongly disagree	70.33	263.38	78.59	99.28	205.09	75.65	105.62	70.18	49.05	73.54	229.24	101.88	124.79	98.03	94.96	52.35	82.92	154.33	100.07	120.51	84.64	78.10	39.20	140.72	78.60	2671.08
Grand Total	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	25000

Weighted	Gender		Age Groups						Ever Owned a Bike		Own a Bike Now		Grand Total
	Female	Male	18-24	25-34	35-44	45-54	55-64	65-79	No	Yes	FALSE	TRUE	
Don't know	2847.92	2370.49	545.95	801.41	938.34	910.63	923.44	1098.63	510.45	4707.95	2299.45	2918.95	5218.40
Strongly agree	1387.41	1416.54	246.58	495.44	526.76	504.76	478.58	551.83	151.91	2652.04	772.95	2031.00	2803.95
Tend to agree	4526.87	4702.80	912.10	1517.89	1697.50	1671.11	1575.59	1855.48	406.47	8823.20	2544.64	6685.03	9229.67
Tend to disagree	2573.16	2503.74	579.96	844.60	893.73	938.33	867.87	952.41	238.65	4838.25	1409.25	3667.65	5076.90
Strongly disagree	1330.65	1340.43	240.42	361.67	409.67	563.16	521.52	574.65	186.36	2484.71	900.97	1770.10	2671.08
Grand Total	12666.00	12334.00	2525.00	4021.00	4466.00	4588.00	4367.00	5033.00	1493.85	23506.15	7927.27	17072.73	25000.00

SAFER TO CYCLE FOR CHILDREN

Weighted	Austria	Balkan	Baltics	Belgium	Bulgaria	Czech Republic	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Romania	Slovakia	Slovenia & Croatia	Spain	Sweden	Switzerland	Türkiye	UK and Ireland	Grand Total
Don't know	30739	11914	22477	22623	15541	28015	31125	34645	26642	28376	12527	22353	23566	29422	29404	20390	18565	12534	27105	19821	21575	33197	27588	11934	25627	587703
Strongly agree	5691	9047	9581	5700	5748	6471	6092	7681	7242	8726	4025	9304	6760	6547	9038	18300	9751	12370	6193	10777	11544	7800	8031	20301	11849	224569
Tend to agree	28720	23556	41210	28277	22901	19760	28461	31321	35207	26279	25643	34933	28732	17407	26766	42024	36089	34514	36326	32200	38053	25183	30895	34495	28998	757950
Tend to disagree	24969	25582	18782	30225	33294	31915	22330	19668	23144	26292	29753	19760	22770	31431	23174	14563	23401	23145	20843	23293	20177	22955	28087	16002	23740	599298
Strongly disagree	9882	29900	7950	13176	22516	13839	11992	6685	7765	10327	28051	13651	18172	15192	11618	4723	12194	17437	9533	13909	8651	10865	5399	17268	9785	330480
Grand Total	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	25000

Weighted	Gender		Age Groups						Ever Owned a Bike		Own a Bike Now		Grand Total
	Female	Male	18-24	25-34	35-44	45-54	55-64	65-79	No	Yes	FALSE	TRUE	
Don't know	3049.48	2827.55	600.66	892.70	1000.49	1003.00	1094.82	1285.36	501.33	5375.71	2329.63	3547.41	5877.03
Strongly agree	1092.59	1153.09	256.86	445.69	434.43	389.44	341.70	377.56	124.30	2121.39	577.81	1667.88	2245.69
Tend to agree	3597.51	3981.99	849.59	1342.10	1400.14	1352.94	1186.62	1448.12	339.43	7240.07	2071.14	5508.36	7579.50
Tend to disagree	3117.65	2875.33	578.74	943.92	1094.22	1113.93	1061.78	1200.38	283.03	5709.94	1783.42	4209.56	5992.98
Strongly disagree	1808.76	1496.04	239.15	396.59	536.72	728.69	682.08	721.58	245.76	3059.04	1165.28	2139.53	3304.80
Grand Total	12666.00	12334.00	2525.00	4021.00	4466.00	4588.00	4367.00	5033.00	1493.85	23506.15	7927.27	17072.73	25000

WHAT HAS BEEN THE MOST EFFECTIVE METHOD OF IMPROVING SAFETY

Weighted	Austria	Balkan	Baltics	Belgium	Bulgaria	Czech Republic	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Romania	Slovakia	Slovenia & Croatia	Spain	Sweden	Switzerland	Türkiye	UK and Ireland	Grand Total
Improved child-friendly cycling infrastructure (e.g., safe bike lanes, car-free streets, clear signage)	201.64	221.74	335.16	205.00	215.46	166.81	185.65	227.80	270.55	183.68	196.86	242.66	245.93	129.52	211.84	443.66	357.10	361.27	305.06	290.41	340.81	213.44	223.68	349.56	282.27	6412.56
School / Community cycling programs and events (e.g., cycling education, skill training, bike-to-school initiatives, community bike rides)	135.95	119.40	149.85	108.75	77.87	90.98	122.04	149.79	122.97	169.00	110.07	174.17	93.53	74.33	120.61	173.79	111.32	142.37	115.71	174.34	172.53	106.60	172.28	243.78	185.75	3417.80
Safety and awareness campaigns (e.g., helmet use, traffic rules, benefits of cycling)	112.04	134.56	218.40	115.08	114.24	100.83	132.08	212.85	124.06	131.71	101.01	162.44	96.79	86.98	145.94	206.33	133.39	145.84	120.76	172.17	184.81	112.25	138.90	308.49	211.84	3728.78
Financial support or subsidies for good quality bikes / safety equipment / maintenance support	44.35	50.84	55.66	45.54	34.59	26.63	48.34	40.39	83.99	57.92	57.11	44.11	49.90	36.07	40.58	99.08	51.34	79.94	58.81	68.58	71.77	49.84	54.70	241.00	102.17	1593.27
Other	0.97	4.55	3.15	8.18		1.33	3.32	11.89	3.06	0.99	1.65	4.31	1.98	7.18	4.60	3.91	1.09	3.22	2.45	3.42	3.03	4.00	12.27		1.98	92.51
Don't know	13.45	10.75	19.74	19.60	15.53	14.02	20.37	18.17	32.12	17.35	6.06	24.59	12.27	20.67	14.07	27.04	10.19	9.86	14.77	11.90	10.09	18.21	22.28	6.18	10.20	404.48
Grand Total	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	25000

Weighted	Gender		Age Groups						Ever Owned a Bike		Own a Bike Now		Grand Total
	Female	Male	18-24	25-34	35-44	45-54	55-64	65-79	No	Yes	FALSE	TRUE	
Improved child-friendly cycling infrastructure (e.g., safe bike lanes, car-free streets, clear signage)	3053.23	3359.33	583.10	1032.41	1178.49	1219.19	1102.53	1296.85	299.28	6113.28	1818.26	4594.30	6412.56
School / Community cycling programs and events (e.g., cycling education, skill training, bike-to-school initiatives, community bike rides)	1580.63	1837.17	429.28	730.17	680.85	510.22	490.64	576.65	136.24	3281.56	781.42	2636.38	3417.80
Safety and awareness campaigns (e.g., helmet use, traffic rules, benefits of cycling)	1717.16	2011.62	405.43	670.08	708.73	620.57	555.40	768.58	154.75	3574.03	984.39	2744.39	3728.78
Financial support or subsidies for good quality bikes / safety equipment / maintenance support	775.05	818.22	240.31	370.91	316.83	251.43	192.97	220.83	71.56	1521.72	342.96	1250.31	1593.27
Other	54.39	38.12	6.27	10.74	12.24	16.44	14.78	32.04	3.83	88.68	22.01	70.50	92.51
Don't know	231.17	173.30	42.59	64.75	71.73	67.71	65.02	92.67	43.62	360.86	184.34	220.13	404.48
Grand Total	12666.00	12334.00	2525.00	4021.00	4466.00	4588.00	4367.00	5033.00	1493.85	23506.15	7927.27	17072.73	25000

WHAT SHOULD BE PRIORITISED TO BEST IMPROVE SAFETY

Weighted	Austria	Balkan	Baltics	Belgium	Bulgaria	Czech Republic	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Romania	Slovakia	Slovenia & Croatia	Spain	Sweden	Switzerland	Türkiye	UK and Ireland	Grand Total
Improved child-friendly cycling infrastructure (e.g., safe bike lanes, car-free streets, clear signage)	501.45	705.27	566.79	582.90	714.71	588.63	506.42	481.14	547.16	550.15	742.53	504.88	618.51	461.87	515.88	566.81	672.16	688.57	591.57	638.90	589.73	512.28	541.62	658.58	547.32	14600.83
School / Community cycling programs and events (e.g., cycling education, skill training, bike-to-school initiatives, community bike rides)	459.86	509.85	433.67	364.79	524.83	438.21	456.34	458.37	352.65	528.88	444.06	518.26	345.34	437.11	423.56	428.18	468.99	445.87	447.87	514.98	458.87	411.60	449.87	544.77	570.23	11436.98
Safety and awareness campaigns (e.g., helmet use, traffic rules, benefits of cycling)	433.82	522.83	461.83	404.45	550.19	407.62	457.09	522.40	335.24	434.43	510.69	427.57	352.72	425.06	494.15	457.49	460.65	445.63	407.71	470.42	422.52	443.05	436.69	595.05	617.59	11496.88
Financial support or subsidies for good quality bikes / safety equipment / maintenance support	206.26	343.76	239.47	218.22	272.46	196.87	143.72	192.81	258.45	201.91	392.76	283.45	243.57	162.96	208.99	266.92	317.98	331.57	262.48	299.93	259.06	212.20	180.02	405.68	272.78	6374.26
Other	35.95	11.38	11.41	29.36	14.31	19.58	54.25	35.91	16.04	28.19	11.78	28.30	16.45	91.74	44.38	19.80	16.21	8.57	17.74	11.86	22.95	55.51	30.48		33.77	665.91
Grand Total	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	25000

Weighted	Gender		Age Groups						Ever Owned a Bike		Own a Bike Now		Grand Total
	Female	Male	18-24	25-34	35-44	45-54	55-64	65-79	No	Yes	FALSE	TRUE	
Improved child-friendly cycling infrastructure (e.g., safe bike lanes, car-free streets, clear signage)	7520.46	7080.37	1291.32	2182.25	2534.27	2800.53	2671.42	3121.04	835.85	13764.98	4683.26	9917.56	14600.83
School / Community cycling programs and events (e.g., cycling education, skill training, bike-to-school initiatives, community bike rides)	5868.71	5568.27	1106.15	1840.06	2038.37	1976.00	2044.28	2432.13	618.77	10818.21	3552.83	7884.15	11436.98
Safety and awareness campaigns (e.g., helmet use, traffic rules, benefits of cycling)	6022.24	5474.64	976.78	1697.07	1934.62	2008.25	2125.22	2754.94	721.57	10775.31	3889.87	7607.01	11496.88
Financial support or subsidies for good quality bikes / safety equipment / maintenance support	3331.31	3042.96	630.02	1043.28	1209.87	1207.80	1099.44	1183.86	406.68	5967.58	2119.83	4254.43	6374.26
Other	326.30	339.61	29.11	39.23	78.72	146.07	169.29	203.50	74.13	591.78	285.21	380.70	665.91
Grand Total	12666.00	12334.00	2525.00	4021.00	4466.00	4588.00	4367.00	5033.00	1493.85	23506.15	7927.27	17072.73	25000

BICYCLE MAINTENANCE ISSUES

Weighted	Austria	Balkan	Baltics	Belgium	Bulgaria	Czech Republic	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Romania	Slovakia	Slovenia & Croatia	Spain	Sweden	Switzerland	Türkiye	UK and Ireland	Grand Total
No Issues	550.11	419.15	437.48	561.13	410.27	465.87	533.89	558.08	482.32	514.78	461.19	437.80	508.34	648.79	539.06	441.32	497.36	391.32	457.83	465.78	515.45	516.68	565.66	400.95	513.72	12294.34
Never Had a Bike	25.93	87.49	58.77	43.57	101.62	51.95	20.96	15.87	91.09	35.26	100.10	59.64	42.57	3.10	28.82	39.69	105.34	118.24	37.78	50.97	83.94	19.62	49.46	91.61	130.45	1493.85
Had Issues	423.96	493.37	503.75	395.29	488.10	482.19	445.15	426.05	426.60	449.96	438.71	502.55	449.09	348.12	432.12	518.99	397.29	490.44	504.39	483.24	400.60	463.70	384.88	507.44	355.82	11211.81
Long waiting times	114.28	106.96	96.24	104.83	95.91	121.27	81.56	96.55	98.96	149.13	94.24	120.10	124.41	107.17	111.14	152.49	64.64	125.58	140.90	100.10	95.71	108.64	106.04	167.71	94.35	2778.91
High Cost	187.77	137.63	202.43	165.47	178.91	191.33	218.99	219.28	195.23	190.32	185.16	230.22	153.11	164.82	180.13	255.79	149.51	198.09	200.93	213.74	167.54	222.28	198.03	243.79	132.68	4783.17
Lack of local bicycle shop or difficult opening hours	121.19	203.65	141.73	94.21	171.84	186.06	124.39	130.58	105.18	121.57	175.99	153.30	152.14	73.83	129.79	135.64	161.79	206.37	168.23	183.65	148.22	142.86	100.74	133.10	128.16	3594.20
Lack of confidence in the shop's service quality/skill of mechanics	74.85	123.13	80.40	65.59	101.77	63.21	87.32	53.09	71.73	86.18	70.02	102.09	72.55	62.02	64.60	96.61	60.88	114.71	88.69	80.13	54.49	71.17	64.97	138.57	87.10	2035.87
Other	41.00	62.87	65.00	39.94	62.64	38.31	38.67	48.83	40.26	36.59	29.27	29.55	37.49	37.90	49.53	32.06	45.35	32.14	49.36	43.10	35.99	40.82	34.89	20.66	34.79	1025.01
Grand Total	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	25000

Weighted	Gender		Age Groups						Ever Owned a Bike		Own a Bike Now		Grand Total
	Female	Male	18-24	25-34	35-44	45-54	55-64	65-79	No	Yes	FALSE	TRUE	
No Issues	6069.22	6225.11	937.65	1544.99	2000.32	2398.90	2473.81	2938.67		12294.34	3776.78	8517.55	12294.34
Never Had a Bike	1071.85	422.00	72.20	161.19	207.76	421.73	290.60	549.37	1493.85		1493.85		1493.85
Had Issues	5524.93	5686.89	1515.16	2314.82	2257.92	1976.37	1602.59	1544.96		11211.81	2656.63	8555.18	11211.81
Long waiting times	1263.37	1515.54	373.91	630.75	589.48	501.41	365.48	317.89		2778.91	411.32	2367.59	2778.91
High Cost	2341.30	2441.87	617.82	985.77	1004.27	884.60	684.73	605.98		4783.17	864.27	3918.90	4783.17
Lack of local bicycle shop or difficult opening hours	1810.08	1784.12	474.31	751.01	702.93	637.55	523.59	504.82		3594.20	922.73	2671.47	3594.20
Lack of confidence in the shop's service quality/skill of mechanics	883.44	1152.43	354.52	494.39	438.76	326.76	233.39	188.06		2035.87	355.41	1680.46	2035.87
Other	595.35	429.66	76.56	114.99	139.59	174.13	209.17	310.58		1025.01	626.23	398.78	1025.01
Grand Total	12666.00	12334.00	2525.00	4021.00	4466.00	4588.00	4367.00	5033.00	1493.85	23506.15	7927.27	17072.73	25000

IMPACT ON CYCLING BEHAVIOUR

Weighted	Austria	Balkan	Baltics	Belgium	Bulgaria	Czech Republic	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Romania	Slovakia	Slovenia & Croatia	Spain	Sweden	Switzerland	Türkiye	UK & Ireland	Grand Total
I delayed necessary repairs	86.14	82.10	66.63	58.00	60.13	69.72	95.21	64.91	70.81	102.48	116.00	73.62	102.66	48.51	99.04	87.89	73.64	111.79	46.60	81.27	78.09	66.78	94.67	121.75	72.17	2035.62
I cycled less frequently	69.22	109.92	74.64	63.42	120.52	126.38	77.29	89.14	84.40	92.15	105.54	93.49	77.93	76.66	84.51	110.61	74.67	124.43	105.74	116.02	86.27	94.13	80.40	106.82	79.20	2323.50
I avoided longer trips or certain routes due to safety concerns	57.61	84.81	68.34	53.08	80.10	72.02	61.48	50.36	60.54	79.68	70.42	65.83	58.29	32.41	64.26	95.53	63.14	92.07	105.63	83.20	64.80	59.41	64.32	116.15	75.94	1779.44
I relied more on other forms of transport (e.g., car, public transport)	103.90	126.36	120.60	74.66	119.94	71.45	111.58	96.51	85.85	105.19	86.95	118.36	87.35	79.93	82.49	84.48	71.09	118.60	93.59	129.66	101.37	92.13	82.13	108.74	87.97	2440.89
I felt less confident or safe while cycling	54.46	59.55	82.34	49.74	66.41	72.34	53.26	53.11	48.35	57.15	63.96	60.80	56.76	37.10	65.21	105.25	37.78	68.19	69.88	55.70	62.36	79.52	47.04	104.37	46.76	1557.40
I stopped cycling altogether (for a period of time)	70.02	78.95	88.29	64.99	90.39	88.78	72.76	71.89	75.93	68.90	78.53	71.16	66.77	55.94	57.32	72.21	82.92	73.08	83.04	72.68	69.76	84.91	67.98	68.69	58.08	1833.95
I tried to fix the bike myself	112.18	128.55	128.94	82.99	121.70	119.21	112.66	137.94	92.56	117.70	109.11	143.74	104.05	72.65	122.48	157.55	89.79	172.26	137.65	149.46	108.86	147.63	106.88	145.33	97.46	3019.33
No significant impact. I continued cycling as usual	69.53	71.21	75.89	75.26	72.14	83.67	62.36	78.20	76.69	66.82	42.84	80.39	64.41	84.67	67.35	76.15	67.80	49.14	83.95	56.68	46.11	66.10	59.85	72.99	50.58	1700.80
Grand Total	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	25000

Weighted	Gender		Age Groups						Ever Owned a Bike		Own a Bike Now		Grand Total	
	Female	Male	18-24	25-34	35-44	45-54	55-64	65-79	No	Yes	FALSE	TRUE		
I delayed necessary repairs	1015.24	1020.37	263.43	482.05	444.85	386.18	243.39	215.71		2035.62	397.25	1638.36	2035.62	
I cycled less frequently	1138.82	1184.68	345.88	480.67	505.56	397.44	303.61	290.34		2323.50	513.41	1810.09	2323.50	
I avoided longer trips or certain routes due to safety concerns	826.44	953.00	271.51	417.05	364.29	297.27	221.36	207.96		1779.44	303.15	1476.29	1779.44	
I relied more on other forms of transport (e.g., car, public transport)	1264.12	1176.76	380.60	555.79	464.87	402.54	305.79	331.29		2440.89	702.40	1738.49	2440.89	
I felt less confident or safe while cycling	759.05	798.35	254.68	350.60	363.20	253.19	158.12	177.61		1557.40	293.96	1263.44	1557.40	
I stopped cycling altogether (for a period of time)	978.32	855.63	268.11	383.98	354.35	283.38	252.38	291.76		1833.95	633.14	1200.82	1833.95	
I tried to fix the bike myself	1239.62	1779.71	379.24	625.28	623.53	550.46	473.00	367.81		3019.33	529.05	2490.28	3019.33	
No significant impact. I continued cycling as usual	865.62	835.18	137.14	248.15	297.74	328.22	340.54	349.01		1700.80	478.57	1222.23	1700.80	
Grand Total	12666.00	12334.00	2525.00	4021.00	4466.00	4588.00	4367.00	5033.00		1493.85	23506.15	7927.27	17072.73	25000

CYCLED LESS DUE TO DIFFICULTIES IN ACCESSING BICYCLE MAINTENANCE OR REPAIR SERVICES?

Weighted	Austria	Balkan	Baltics	Belgium	Bulgaria	Czech Republic	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Romania	Slovakia	Slovenia & Croatia	Spain	Sweden	Switzerland	Türkiye	UK & Ireland	Grand Total
-	769.58	688.29	715.17	793.75	692.23	717.61	753.17	775.26	758.45	747.28	739.11	720.56	765.97	822.21	778.42	717.73	766.08	709.16	714.03	698.46	749.47	744.46	788.45	707.68	782.97	18615.56
<5% - Minimal impact: Maintenance difficulties had a very slight effect on cycling time; they were barely noticeable.	42.37	42.42	46.50	17.32	44.80	35.73	26.85	33.66	39.88	36.85	28.66	44.08	25.50	24.27	41.60	43.10	31.23	41.69	31.62	28.16	33.36	29.88	24.70	20.66	24.21	839.12
5-25% - Minor impact: Maintenance difficulties occasionally reduced cycling time, but the overall disruption was small.	71.51	76.89	76.41	62.79	87.73	91.88	79.34	64.33	82.13	77.86	84.90	80.32	102.23	50.76	66.49	95.10	66.84	101.30	88.33	76.93	95.07	87.81	77.17	83.39	73.68	2006.20
26-50% - Moderate impact: Maintenance barriers led to a noticeable decrease in cycling time; they sometimes hindered cycling.	58.99	86.38	89.46	53.00	76.42	78.30	52.25	55.42	56.58	73.29	71.99	83.58	59.90	47.06	56.66	69.53	62.64	77.36	94.26	84.14	69.45	68.89	63.01	89.61	66.45	1744.61
51-75% - Significant impact: Maintenance difficulties frequently interfered with cycling, often reducing time spent cycling.	29.65	56.98	37.06	32.33	46.64	44.60	46.68	30.52	31.68	30.99	41.76	34.46	31.08	26.97	30.45	48.58	30.31	25.31	42.07	60.43	28.45	40.74	24.30	64.61	29.60	946.25
76-99% - Extreme impact: Maintenance difficulties almost always prevented cycling; they consistently disrupted cycling routines.	12.95	19.44	14.92	11.30	20.15	13.54	19.10	17.20	15.34	10.70	12.08	10.08	7.29	10.52	9.12	10.99	13.39	17.06	9.39	21.94	13.20	8.31	14.17	23.68	10.17	346.03
100% - Maximum impact: Maintenance difficulties completely stopped me from cycling.	14.95	29.60	20.48	29.52	32.02	18.33	22.61	23.60	10.94	23.04	21.49	26.90	8.02	18.22	12.26	14.97	29.52	28.12	20.29	29.92	11.00	19.92	8.20	10.37	12.93	502.22
Grand Total	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	25000

Weighted	Gender		Age Groups						Ever Owned a Bike		Own a Bike Now		Grand Total
	Female	Male	18-24	25-34	35-44	45-54	55-64	65-79	No	Yes	FALSE	TRUE	
-	9450.80	9164.76	1557.16	2628.97	3183.86	3531.18	3529.73	4184.66	1493.85	17121.71	6300.82	12314.74	18615.56
<5% - Minimal impact: Maintenance difficulties had a very slight effect on cycling time; they were barely noticeable.	416.53	422.59	127.15	161.55	153.28	132.10	126.70	138.34		839.12	222.13	617.00	839.12
5-25% - Minor impact: Maintenance difficulties occasionally reduced cycling time, but the overall disruption was small.	921.06	1085.14	293.30	447.10	458.29	361.97	249.30	196.24		2006.20	351.08	1655.12	2006.20
26-50% - Moderate impact: Maintenance barriers led to a noticeable decrease in cycling time; they sometimes hindered cycling.	860.69	883.92	288.70	434.58	353.01	264.12	207.05	197.15		1744.61	381.14	1363.46	1744.61
51-75% - Significant impact: Maintenance difficulties frequently interfered with cycling, often reducing time spent cycling.	496.08	450.17	167.36	217.54	198.64	158.15	101.17	103.40		946.25	244.84	701.41	946.25
76-99% - Extreme impact: Maintenance difficulties almost always prevented cycling; they consistently disrupted cycling routines.	188.62	157.41	56.34	79.74	54.58	50.54	55.00	49.83		346.03	107.10	238.93	346.03
100% - Maximum impact: Maintenance difficulties completely stopped me from cycling.	332.21	170.00	34.98	51.52	64.34	89.93	98.06	163.38		502.22	320.16	182.06	502.22
Grand Total	12666.00	12334.00	2525.00	4021.00	4466.00	4588.00	4367.00	5033.00	1493.85	23506.15	7927.27	17072.73	25000