

SAMPLE REPORT

PeopleForBikes Survey of the E-Bike Curious

November 2022

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Background and Objectives

PeopleForBikes conducts an e-bike owner survey through Portland State University every couple of years. That study provides detailed information on the demographics, psychographics, and behaviors of those who have already purchased an e-bike. However, there is little known about those who are interested in purchasing an e-bike but have not yet done so. The current study was designed to better understand those who have an interest in purchasing an e-bike with a focus on how to encourage the e-bike curious to purchase. Specifically, this research was designed to answer the following questions:

- How do the e-bike curious intend to use an e-bike?
- Why are they interested in e-bikes and what are the purchase barriers?
- What are the most influential information sources?
- What factors are most important as they consider purchasing an e-bike?
- Who are the e-bike curious demographically, psychologically, and behaviorally?

NAXION conducted a 20-minute online survey in September 2022. The survey was fielded to an online panel demographically representative of U.S. adults. To qualify for the study, respondents must have met one of the following criteria:

- Do not currently own an e-bike
- Interested in purchasing an e-bike (5+ on a 7-point scale)

A total of 503 U.S. Adults ages 18+ completed the survey, providing an overall margin of error +/- 5% at a 95% level of confidence

Weighting: Because the distribution of gender, ethnicity, age, household income, and region is unknown for the population of the e-bike curious, weighting took place over three-steps:

- All respondents who completed the screener and passed quality control questions were weighted to represent the U.S. population for gender, ethnicity, age, household income, and region (regardless of whether they qualified for or completed the survey); Population estimates were based on the 2021 CPS.
- Because we don't know the distributions of gender, ethnicity, age, household income, and region in the eligible population, the weighted screeners were used to create weighting targets that represent the eligible population (e-bike curious) on those demographic dimensions.
- The distribution of respondents who completed the study were nearly identical to that of the weighted eligible population for gender, ethnicity, age, household income, and region, so weights were not applied to completed respondents.

Executive Summary

Executive Summary: How do the e-bike curious intend to use an e-bike?

- **Most of the e-bike curious intend to use an e-bike for both recreation and transportation**
 - About XX% plan to use an e-bike only for recreation
 - Only XX% plan to use an e-bike solely for transportation
- **Of those that plan to use an e-bike for transportation...**
 - More than XX expect to replace some of the trips they currently take by motor vehicle
 - XX would be new transportation riders
 - Nearly XX% expect to commute with an e-bike
- **Of those that plan to use an e-bike for recreation...**
 - Nearly XX% intend to use an e-bike to take more bike rides
 - Another XX% want to start a new type of riding
 - Just over XX% want to use an e-bike to start riding
 - XX plan to ride an e-bike on paved surfaces
 - Just under XX% plan to ride an e-bike on mountain bike trails

Executive Summary: What are the most influential information sources?

- **XX, XX, and XX are the top three information sources that the e-bike curious have already used and are ranked the most influential**
- **However, the e-bike curious are most likely to visit a retailer that sells XX, test ride at XX, and/or visit XX in the future**

Executive Summary: What are the most important purchase factors?

- **Nearly XX of the e-bike curious have not yet started shopping and only about XX% are far along or ready to buy**
- **XX ebikes are most commonly mentioned as the type of e-bike under consideration (XX%)**
 - About XX% are considering an e-MTB
 - Nearly XX% don't know what type of e-bike they will purchase
- **The most important factors influencing the purchase decision include...**
 - Factor 1
 - Factor 2
 - Factor 3
 - Factor 4
- **The e-bike curious are least familiar with XX, XX, and XX**
 - Though Factor 1 and Factor 2 are the top two factors for familiarity, only XX% of the e-bike curious are familiar with those factors suggesting there is opportunity for education

Executive Summary: What are the most important purchase factors?

- **Though XX% of the e-bike curious say XX is important...**
 - Only XX% say they are familiar with XX
 - Once it is explained, XX% say they want XX
- **Similarly, XX% of the e-bike curious say XX is important...**
 - Only XX% say they are familiar with options for XX
 - Once it is explained, XX% say they want XX and XX% say they want XX
- **XX% of e-bike curious plan to buy XX but, XX% aren't sure whether they will buy new or used**
- **More than XX% plan to buy at a store that sells XX**
 - XX% plan to purchase from XX
 - Almost XX% don't know where they will purchase
- **About half (XX%) of the e-bike curious expect to spend between \$XX and \$XX on an e-bike**
 - Another XX% expect to pay between \$XX and \$XX
 - Only XX% expect to pay \$XX or more
 - About XX% don't know

Executive Summary: Who are the e-bike curious?

- **XX% of the e-bike curious own a conventional bicycle and just under XX% say they ride at least weekly**
 - Nearly XX% report that bicycling plays an important role in their lives
 - Of those that ride, XX% ride for recreation and XX% for transportation
- **XX% report that they are extremely physically active**
 - XX and XX activities are the most common
- **The e-bike curious report an affinity for XX and XX**
 - They also like XX, seek XX, and are committed to XX
 - They aren't especially likely to think of themselves as XX and prefer not to XX
- **When shopping, the e-bike curious look for XX, prefer XX, and enjoy the research process**
 - They tend not to look for XX
 - And, they don't tend to focus on XX

- **Most of the e-bike curious use social media with YouTube and Facebook the most popular; few use XX**
- **Nearly all watch T.V. or listen to music during their free time**
- **Compared to the U.S. population, the e-bike curious are...**
 - Age
 - Gender
 - Education
 - Political affiliation
 - Do not / have children
 - Urban / suburban / rural

Detailed Findings: Intended Use

Detailed Findings: Purchase Motivations and Barriers

Detailed Findings: Purchase Process and Considerations

Detailed Findings: Current Bicycling Behaviors

Detailed Findings: Profile of the E-Bike Curious