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Authors/Project Management

SwitzerlandMobility Foundation, Lorenz Schweizer/Lukas Stadtherr

Design

SwitzerlandMobility Foundation, Beatrice Nünlist

Images

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Contact

SwitzerlandMobility Foundation, Monbijoustrasse 61, 3007 Bern

info@switzerlandmobility.ch

www.switzerlandmobility.ch

www.switzerlandmobility.org

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Foreword

Inaugurated in 2008, SwitzerlandMobility, the continuously expanding network for non-motorised traffic, is enjoying growing popularity. Whether hiking, on two wheels with a bicycle or mountain bike, on the water with a canoe or on winter hiking, snowshoe or cross-country skiing trails in winter: the Swiss population is out and about in nature more than ever before. Outdoor activities are also more popular than ever with foreign guests.

The increasing popularity of non-motorised traffic also benefits SwitzerlandMobility, directly and indirectly. Consequently, the way in which SwitzerlandMobility is used is particularly interesting. Who uses the SwitzerlandMobility routes, for what reasons and for how long? How is usage developing? What are the resulting effects, e.g., in the area of value added? These and many other questions are the basis for comprehensive monitoring.

The results are encouraging: in 2019 1.9 million people used the Hiking in Switzerland, 1.2 million the Cycling in Switzerland and 270,000 people the Mountainbiking in Switzerland routes. A total of over 1.3 billion Swiss francs was spent along the routes, underlining the economic importance of SwitzerlandMobility. 10 million visits to the SwitzerlandMobility website in 2020 and 21 million to the app illustrate that the information platforms are highly relevant.

The experiences, results and feedback from the past years allow us to assume that the use of SwitzerlandMobility will continue to grow in the future. This is both an opportunity and a mandate to continuously develop and improve our services.

On behalf of the SwitzerlandMobility Foundation Board, I would like to thank all those involved in the implementation of this study. The results show that SwitzerlandMobility is on course, in close consultation and cooperation with numerous partners. We look forward to the further development of this collaborative work, for the benefit of the population and foreign guests.

Stefan Engler, Councillor of States
President SwitzerlandMobility Foundation

Bern, June 2021





Overview of types of mobility

Most popular sport and exercise activities among the Swiss population

Of all the sports practised in Switzerland, hiking and cycling are the two most popular and their popularity has again increased sharply in the last 6 years.

Mountain biking is also increasingly popular and is about on a par with football or gymnastics. Hikers are very satisfied with the main experience and infrastructure aspects of the hikes. Cyclists are very satisfied with the main experience aspects and largely satisfied with the main important infrastructure aspects.

Skating and canoeing are niche sports. Skating has sunk in popularity since 2013.

The winter activities integrated in SwitzerlandMobility have also strongly gained popularity and are in the "Top 20" most popular sports. The popularity of winter hiking could not be surveyed as it is not considered a sport in its own right.

Active athletes (estimate based on population)

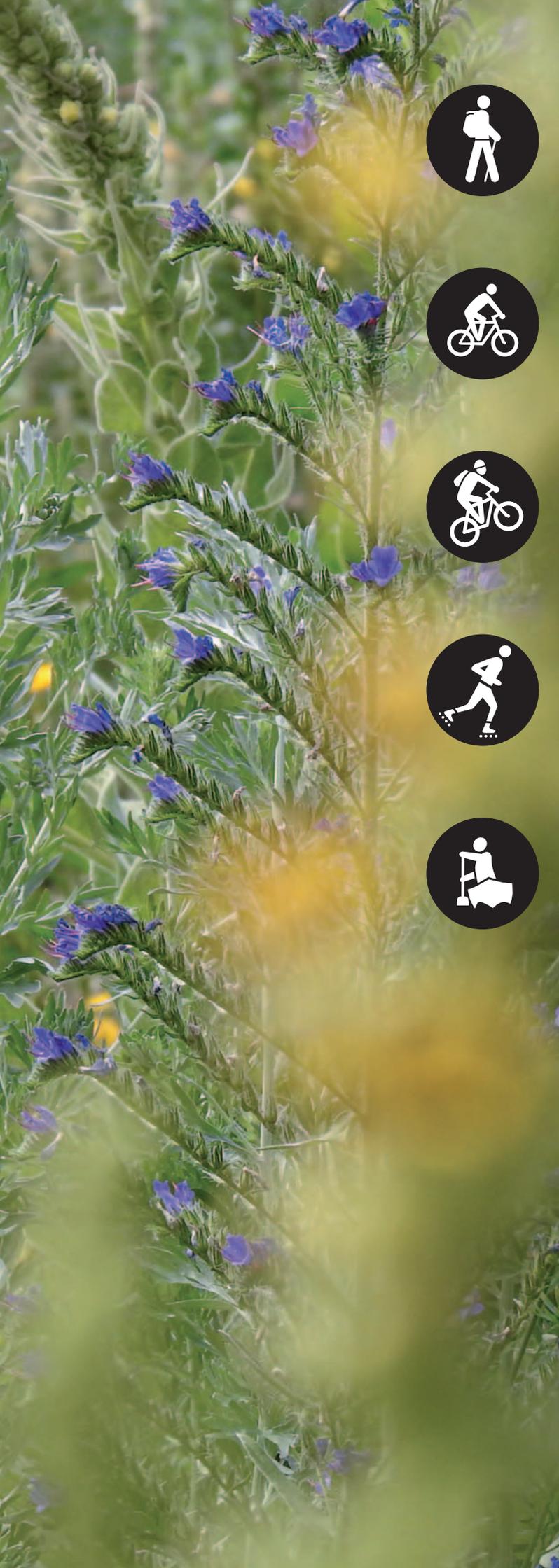
Hiking/Mountain hiking	3'980'000
Cycling	2'940'000
Mountain biking	550'000
Skating	137'000
Canoeing	47'000
Snowshoe hiking	230'000
Cross country skiing	370'000
Sledging	410'000



Proportion of population

	2007	2013	2019
Hiking/Mountain hiking	37.4 %	44.3 %	56.9 %
Cycling	35.6 %	39.1 %	42.0 %
Mountain biking	6.1 %	6.3 %	7.9 %
Skating	3.8 %	3.0 %	2.0 %
Canoeing	0.2 %	0.2 %	0.7 %
Snowshoe hiking	1.3 %	2.7 %	3.3 %
Cross country skiing	4.5 %	4.1 %	5.3 %
Sledging		3.3 %	5.8 %





Awareness and use of SwitzerlandMobility services among active participants

Two thirds of hikers, cyclists and mountain bikers know the routes of Hiking, Cycling and Mountainbiking in Switzerland, and almost half have already used said routes.

Awareness, and to an even greater extent usage, of SwitzerlandMobility routes has increased for all types of mobility since the last survey

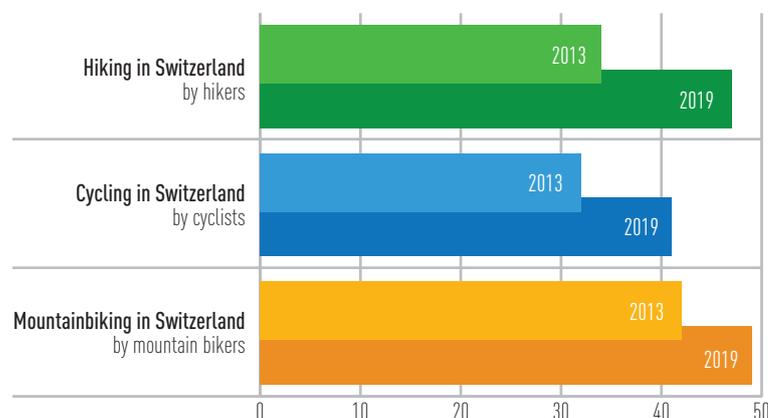
Between a third and half of the people who participate in the other types of mobility are aware of the Switzerland-Mobility routes for each mobility type accordingly.

Awareness and usage of SwitzerlandMobility's offers among active participants

	Routes known 2019	Change from 2013	Routes used 2019	Change from 2013
Hiking in Switzerland routes among hikers	64.3 %	+5.9	46.9 %	+12.8
Cycling in Switzerland routes among cyclists	61.0 %	+3.3	41.2 %	+8.9
Mountainbiking in Switzerland routes among mountain bikers	65.7 %	+1.0	48.6 %	+6.7
Skating in Switzerland routes among skaters	44.4 %	+4.3	14.2 %	+3.9
Canoeing in Switzerland routes among canoeists	27.5 %			
Signposted winter hiking trails by SwitzerlandMobility (among hikers)	26.6 %			
Signposted snowshoe routes from SwitzerlandMobility (among snowshoe hikers)	45.1 %			
SwitzerlandMobility signposted cross country skiing trails (among cross-country skiers)	41.2 %			
SwitzerlandMobility sledge runs (among sledgers)	27.3 %			



Usage of SwitzerlandMobility routes (proportion of respondents who have already used the Hiking in Switzerland/Cycling in Switzerland/Mountainbiking in Switzerland routes (%))





Awareness and use of SwitzerlandMobility among the population

20% of the Swiss population say they are familiar with SwitzerlandMobility. The SwitzerlandMobility umbrella brand is less well known than the mobility-specific brands Hiking in Switzerland and Cycling in Switzerland.

Awareness and use of the Hiking, Cycling and Mountainbiking in Switzerland routes has increased significantly since the last survey.

Awareness of SwitzerlandMobility among the population¹

	SwitzerlandMobility known	Change since 2013
Total population	19.5%	+ 1.5
Cyclists	24.5%	+ 2.5
Hikers	22.5%	+ 6.5
Mountain bikers	34.1%	+ 12.1

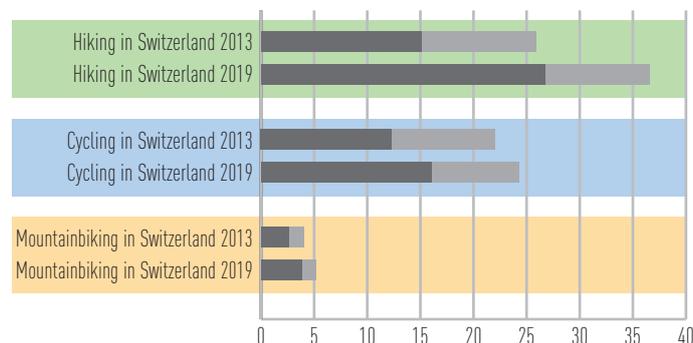


Number of users, estimate based on population²

	2013	2019
Hiking in Switzerland	920'000	1'870'000
Cycling in Switzerland	750'000	1'150'000
Mountainbiking in Switzerland	160'000	270'000
Skating in Switzerland	45'000	43'000
Canoeing in Switzerland	5'000	7'000



Awareness of the Hiking in Switzerland, Cycling in Switzerland and Mountainbiking in Switzerland routes among the population (%)³



Routes known + used
 Routes known but not used

¹Database: Database: Sport Schweiz 2020. Number of respondents: 840 (SwitzerlandMobility additional module). | ²Database: Sport Schweiz 2020. Number of respondents: 11,301 | Filter: Population aged 15 and over (2013: population aged 15 to 74). | ³Database: Sport Schweiz 2020 and Sport Schweiz 2014. Number of respondents: 2019: 11,301; 2013: 10,652. | Filter: Population aged 15 and over (2013: population aged 15 to 74).



Who are the users of Switzerland Mobility routes?

For mountain biking and canoeing, men tend to be in the majority, for snowshoe trekking and sledging, women. For hiking, cycling, skating and cross-country skiing, the gender balance is even.

Skating, canoeing and sledging are more popular with younger people, while hiking, cross-country skiing and snowshoe trekking are more popular with older people. Cycling and mountain biking are in the middle.

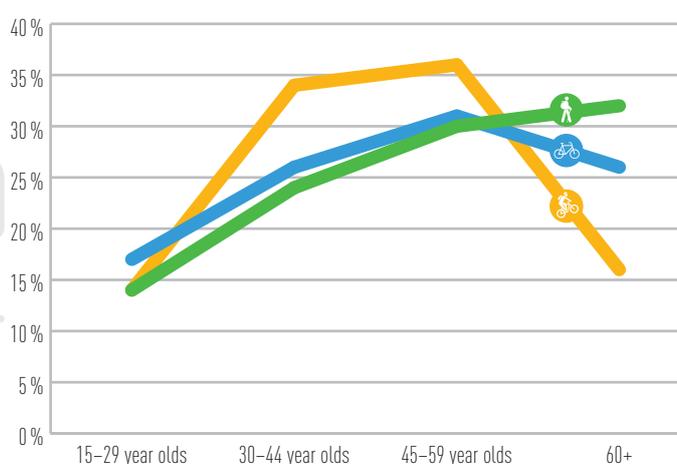
Hiking is more frequent with increasing age, cycling and especially mountain biking are most common in midlife.

Proportion of women and average age

	Proportion of women	Average age
Hiking/Mountain hiking	53 %	50
Cycling	50 %	47
Mountain biking	24 %	45
Skating	52 %	38
Canoeing	33 %	41
Snowshoe hiking	62 %	53
Cross country skiing	50 %	51
Sledging	63 %	41



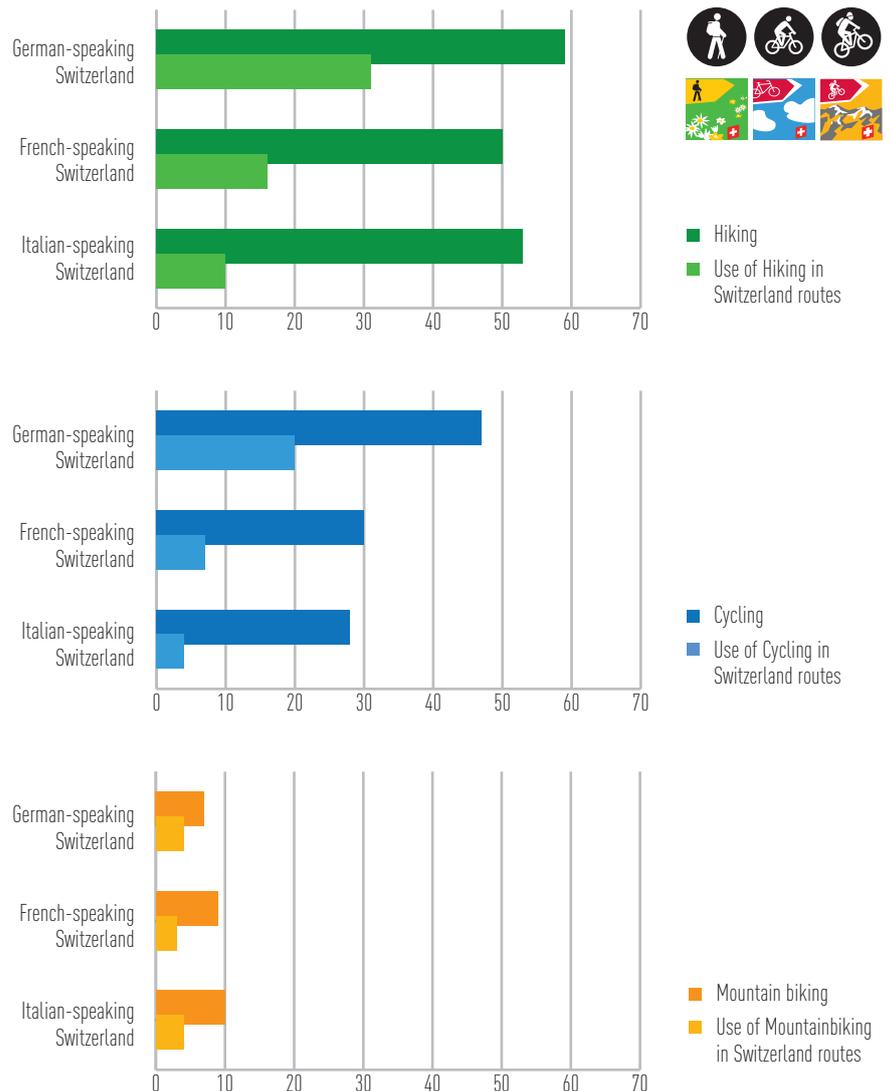
Age distribution



Cycling is considerably more popular among the German-speaking Swiss than among the French-speaking and Italian-speaking Swiss. This difference is less marked for hiking, while mountain biking is slightly more popular among those in the French speaking regions and Ticino than in the German-speaking regions.

The proportion of hikers, cyclists and mountain bikers who use the routes of Hiking in Switzerland, Cycling in Switzerland and Mountainbiking in Switzerland is higher among the German-speaking Swiss than among the French-speaking Swiss and higher among the French-speaking Swiss than among the people in Ticino.

Regional distribution (%)







Route usage

En route in groups

When using Hiking in Switzerland, Cycling in Switzerland and Mountain Biking in Switzerland routes, people are most often en route in pairs. Mountain bikers are also often out alone, hikers in larger groups.

Children under the age of 14 are occasionally taken along on the Cycling in Switzerland and Hiking in Switzerland routes but rarely on Mountainbiking in Switzerland routes.

Size and composition of the groups

	Average number of persons	Proportion of tours made alone	Proportion of tours made with children (under 14)
Hiking in Switzerland	3.1	11 %	11 %
Cycling in Switzerland	2.2	19 %	11 %
Mountainbiking in Switzerland	2.8	31 %	7 %



Duration of tours and stages

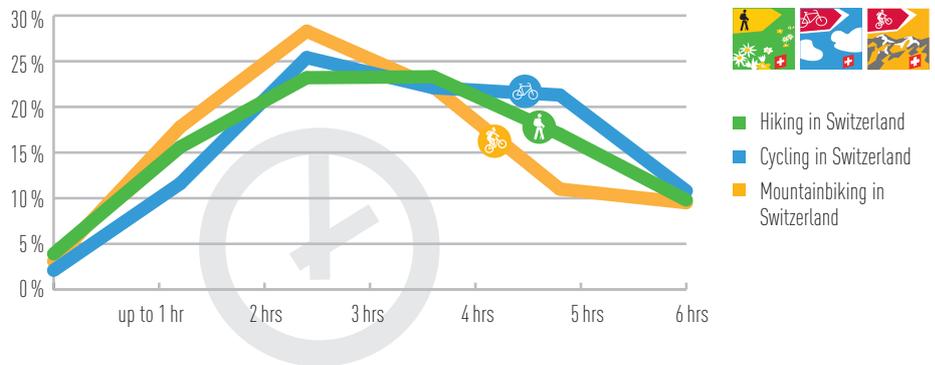
The vast majority of Hiking in Switzerland, Cycling in Switzerland and Mountainbiking in Switzerland tours last between 2 and 5 hours (pure cycling or hiking time). The Mountainbiking in Switzerland tours tend to be in the lower part of this spectrum, the Hiking in Switzerland tours in the middle and the Cycling in Switzerland tours clearly in the upper part.

The majority of tours on Hiking in Switzerland, Cycling in Switzerland and Mountainbiking in Switzerland routes are day tours without an overnight stay. Day tours as part

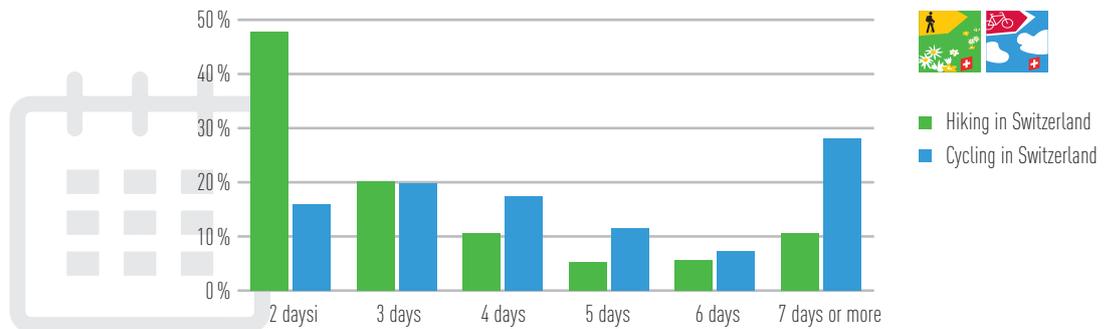
of a holiday play an important role when using the Hiking in Switzerland and Mountainbiking in Switzerland routes, whereas with the Cycling in Switzerland routes, it is multi-day tours which play an important role. On Mountainbiking in Switzerland routes, multi-day tours are relatively rare.

While multi-day tours typically last 2 days on Hiking in Switzerland routes, on Cycling in Switzerland routes 3–4 day tours are most common.

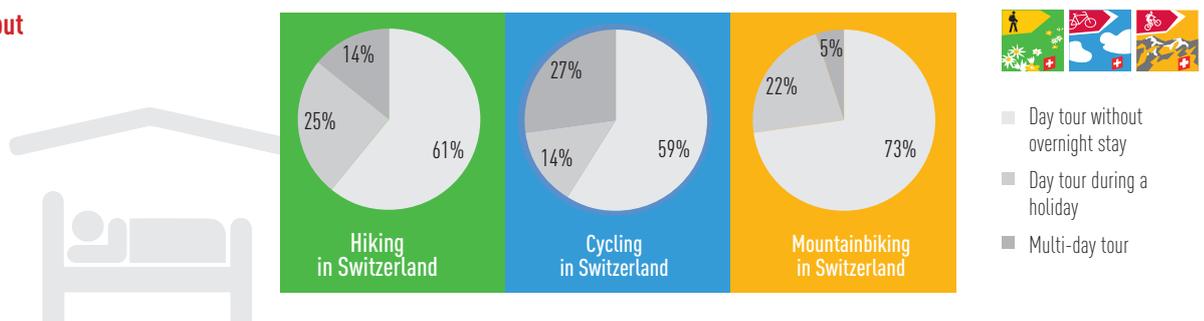
Pure hiking time or riding time per tour or stage



Duration of multi-day tours



Tours with and without overnight stays



Database: Befragung der Wandernden 2019 (Survey of Hikers 2019). Number of respondents: 2,610. Veloland-Befragung 2019 (Cycling in Switzerland Survey 2019). Number of respondents: 2,118. Mountainbikeland-Befragung 2019 (Mountainbiking in Switzerland Survey 2019). Number of respondents: 621 (600 mountain bikers with valid data regarding duration). | Filter: Cycling in Switzerland/Hiking in Switzerland/Mountainbiking in Switzerland routes deliberately chosen. | Note: In the case of Mountainbiking in Switzerland, the duration of multi-day tours could not be evaluated due to the small number of cases.

Means of transport and combined mobility

Cycling and mountain biking tours are most often made from home, without using another means of transport.

If another means of transport is used for the journey to and from the destination, this is usually public transport (PT). For hiking and cycling, public transport is, however, only slightly ahead of individual motorised transport (IMT).

In recent years, the prevalence of e-bikes and e-mountain bikes has significantly increased. Nevertheless, more than half of the people on Cycling in Switzerland routes and more than two-thirds of the people on Mountainbiking in Switzerland routes still ride without a battery.

Fast e-bikes and e-mountain bikes are marginal.

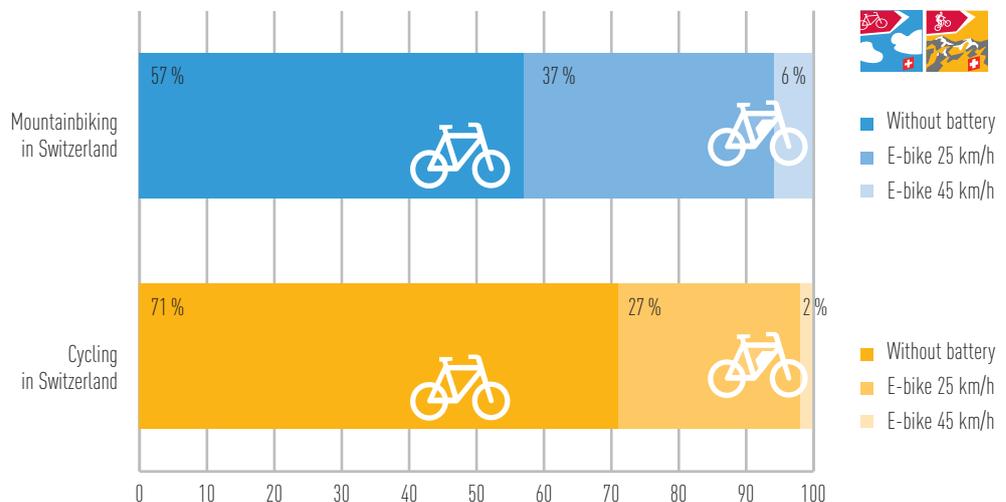
Means of transport for journey there and back (without mountain railways/boats)



	Hiking in Switzerland	Cycling in Switzerland	Mountainbiking in Switzerland
Non-motorised traffic (NMT), without PT/IMT	16 %	67 %	41 %
Public transport (PT)	40 %	18 %	40 %
Individual motorised transport (IMT)	38 %	14 %	16 %
Combination of PT/IMT	6 %	1 %	3 %



E-bikes and e-mountain bikes



■ Without battery
■ E-bike 25 km/h
■ E-bike 45 km/h

■ Without battery
■ E-bike 25 km/h
■ E-bike 45 km/h

Database: Befragung der Wandernden 2019 [Survey of Hikers 2019]. Number of respondents: 2,610. Veloland-Befragung 2019 [Cycling in Switzerland Survey 2019]. Number of respondents: 2,118. Mountainbikeland-Befragung 2019 [Mountainbiking in Switzerland Survey 2019]. Number of respondents: 621. | Filter: Cycling in Switzerland/ Hiking in Switzerland/Mountainbiking in Switzerland routes deliberately chosen.

Most important aspects of routes and satisfaction therewith

An attractive landscape and experiencing nature are central on hiking and cycling tours.

The infrastructure (condition of the paths, varied paths, signposting) is also very important.

Additional facilities such as restaurants, accommodation, service stations, benches, barbecue areas and charging stations for e-bikes are also appreciated by some users, but they do not make it into the "Top 5" and are therefore significantly less important than the routes themselves.

Hikers are very satisfied with the main experience and infrastructure aspects of the hikes. Cyclists are very satisfied with the main experience aspects and largely satisfied with the main important infrastructure aspects.

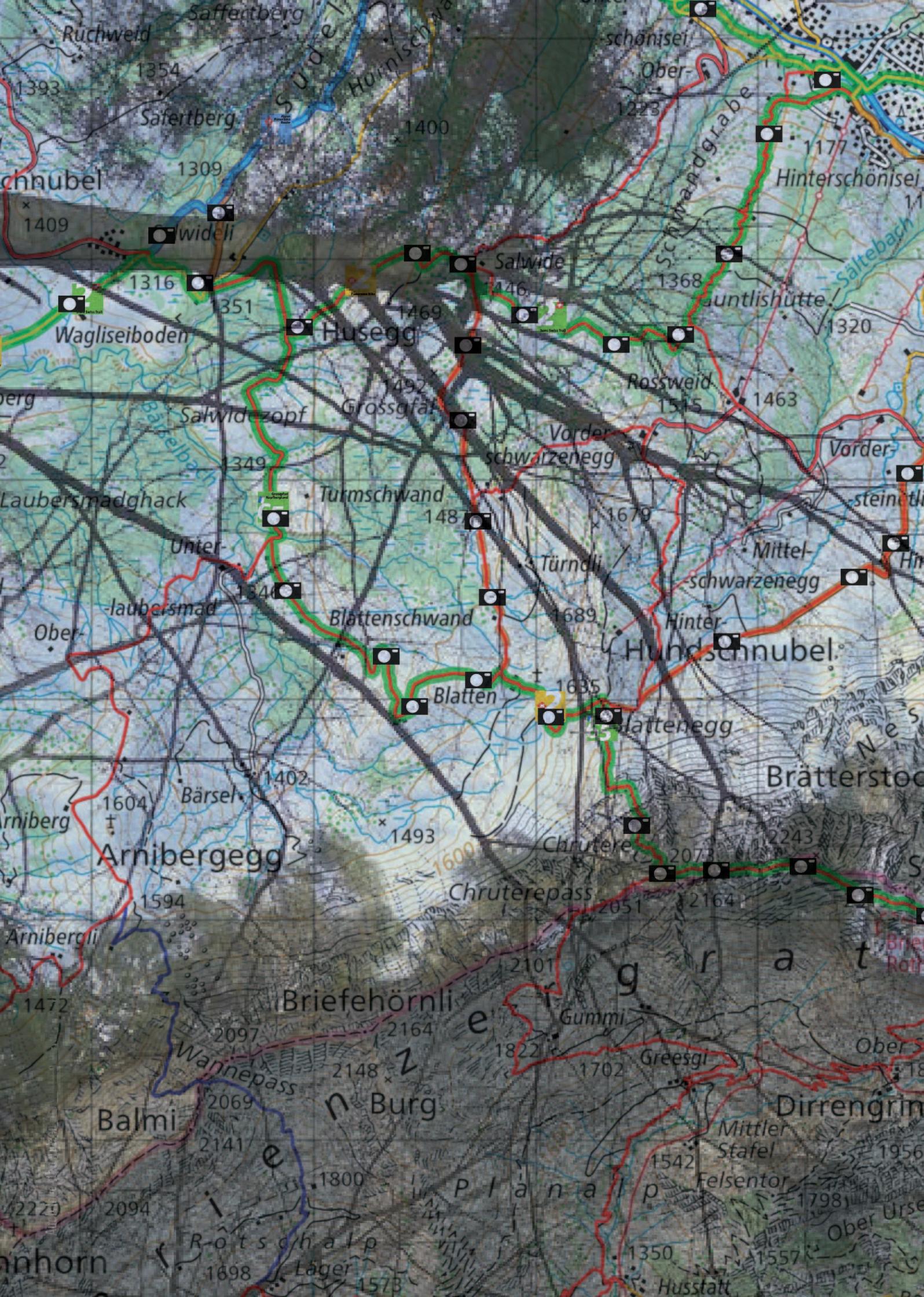
Most important aspects of routes and satisfaction therewith

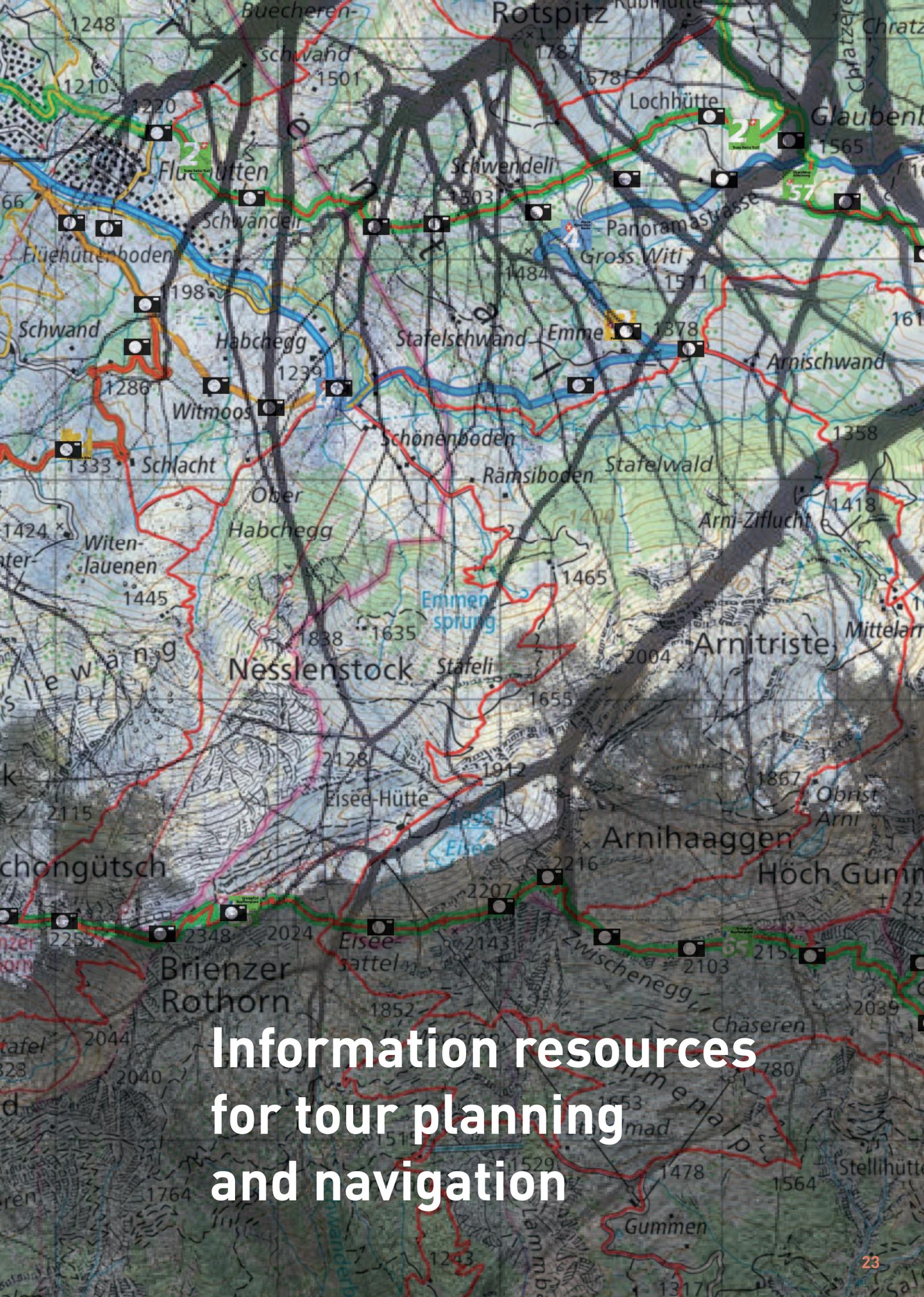
Hikes	Important	Satisfied
1. Attractiveness of landscape	98 %	98 %
2. Experiencing nature	97 %	98 %
3. Varied paths	90 %	94 %
4. Continuous signposting	87 %	89 %
5. Natural surfaces	85 %	90 %



Cycling tours	Important	Satisfied
1. Attractiveness of landscape	96 %	94 %
2. Experiencing nature	94 %	92 %
3. Varied paths	90 %	89 %
4. Paths being in good condition	88 %	86 %
5. Continuous signposting	84 %	77 %







**Information resources
for tour planning
and navigation**

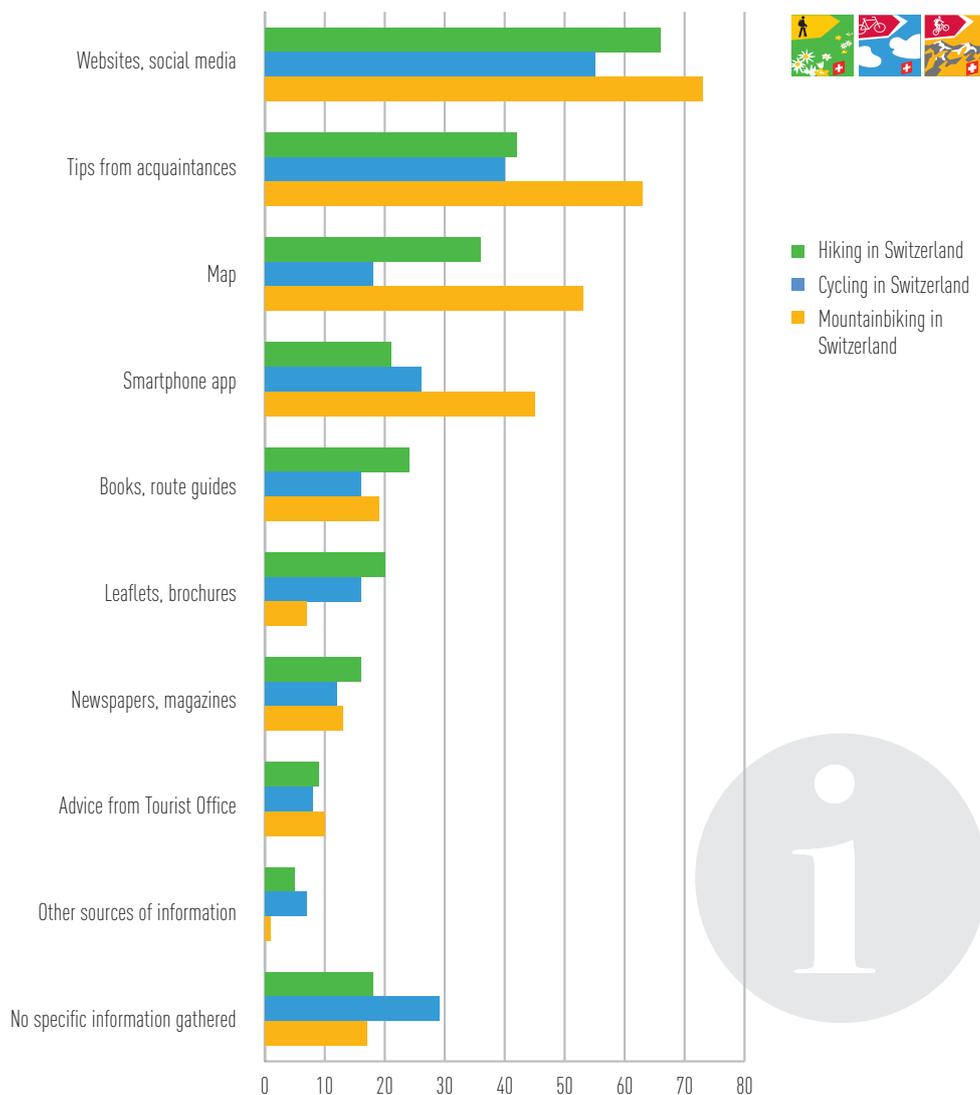
Tour planning

Websites and social media are the most important information sources for tour planning. This was also the case in the last survey in 2013.

Books, route guides and maps have become less important. Maps, however, are still among the most important information sources.

Smartphone apps are also among the most important information sources. They have seen the strongest growth since the last survey.

Tour planning (%)



Database: Sport Schweiz 2020. Number of respondents: 11,301 | Filter: Longer hikes and Hiking in Switzerland routes used, longer cycling tours and Cycling in Switzerland routes used, longer mountain bike tours and Mountainbiking in Switzerland routes used | Note: Multiple answers possible.

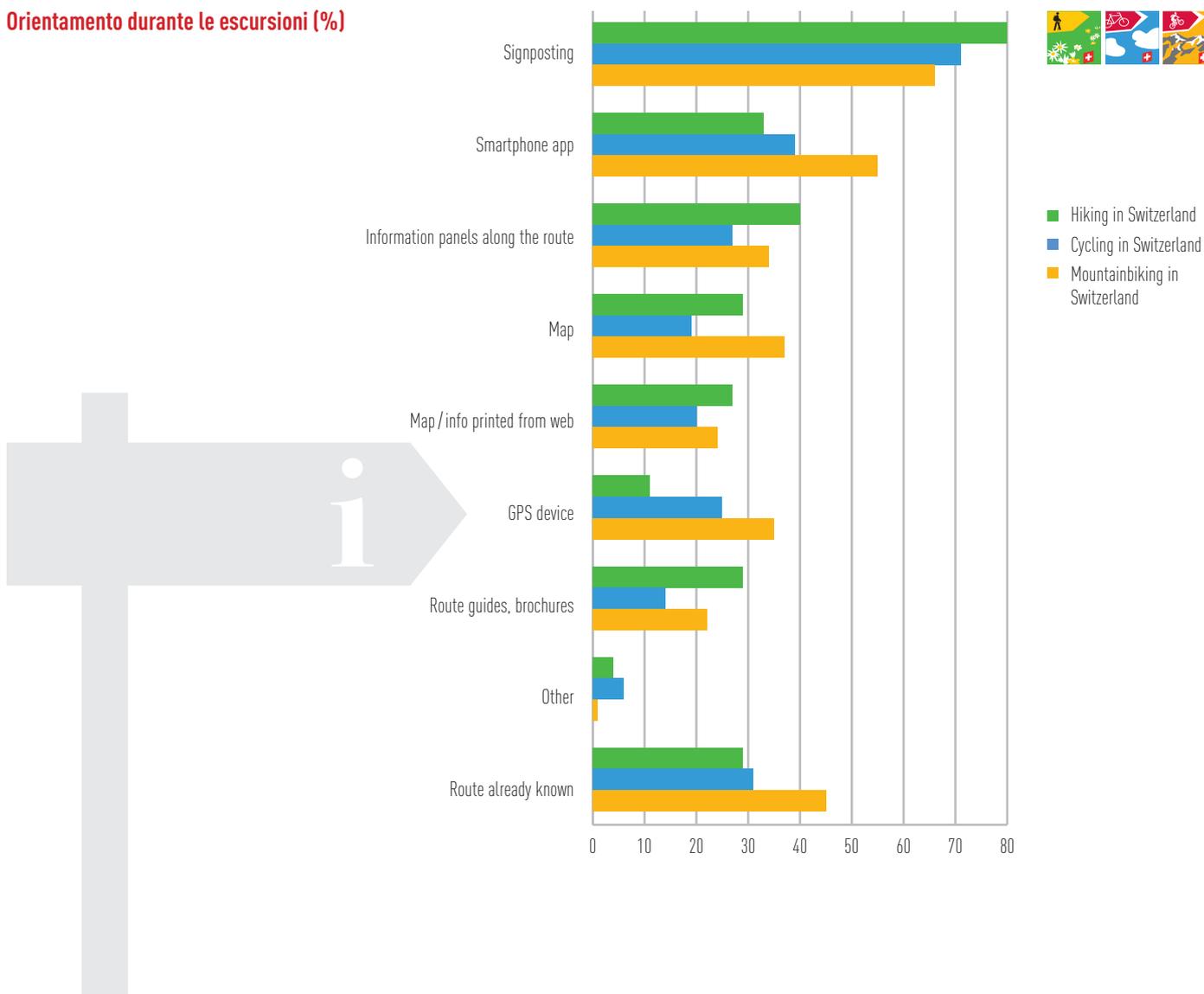
Navigation en route

As with the last survey in 2013, signposting is clearly the most important tool for navigation.

Smartphone apps are also very popular, they have seen the strongest growth since the last survey.

Maps as well as route guides and brochures have become less important since the last survey.

Orientamento durante le escursioni (%)



Database: Sport Schweiz 2020. Number of respondents: 11,301 | Filter: Longer hikes and Hiking in Switzerland routes used, longer cycling tours and Cycling in Switzerland routes used, longer mountain bike tours and Mountainbiking in Switzerland routes used | Note: Multiple answers possible.

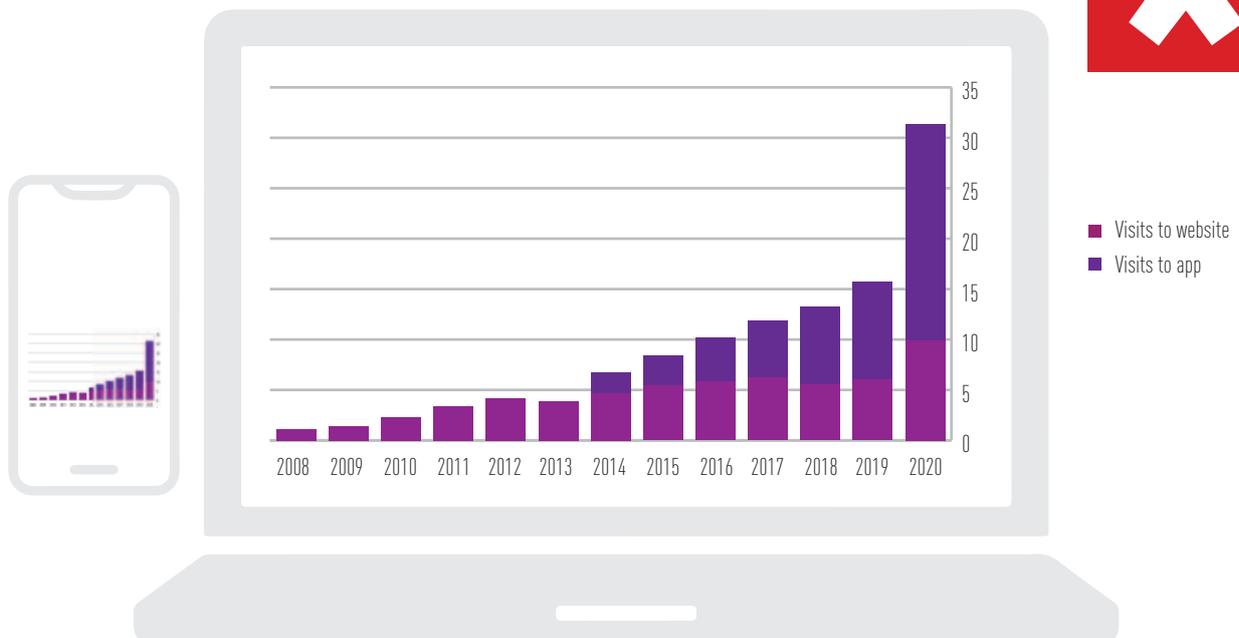
Use of SwitzerlandMobility information media

Visits to the SwitzerlandMobility website and smartphone app have increased considerably at a steady rate. In 2020, SwitzerlandMobility's online channels were visited more than 30 million times.

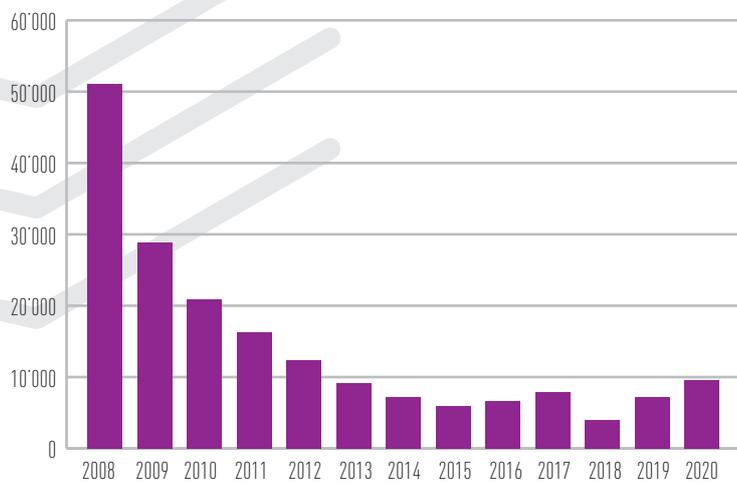
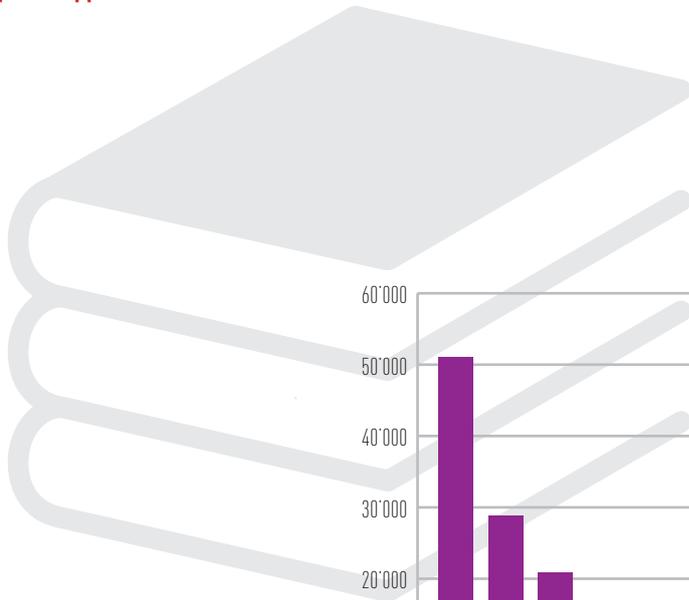
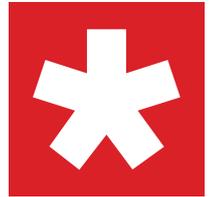
In recent years, the smartphone app in particular has enjoyed significant growth.

Sales of route guides in bookshops has declined considerably compared to the online sector. Since 2018, however, the sales figures in print have been rising again.

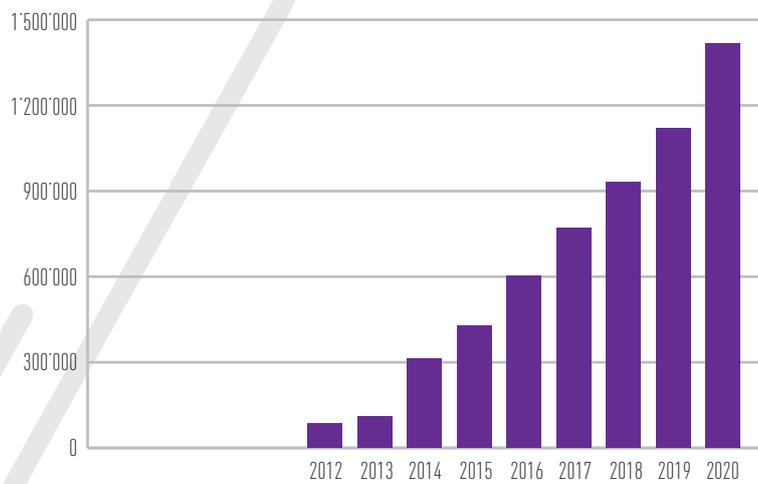
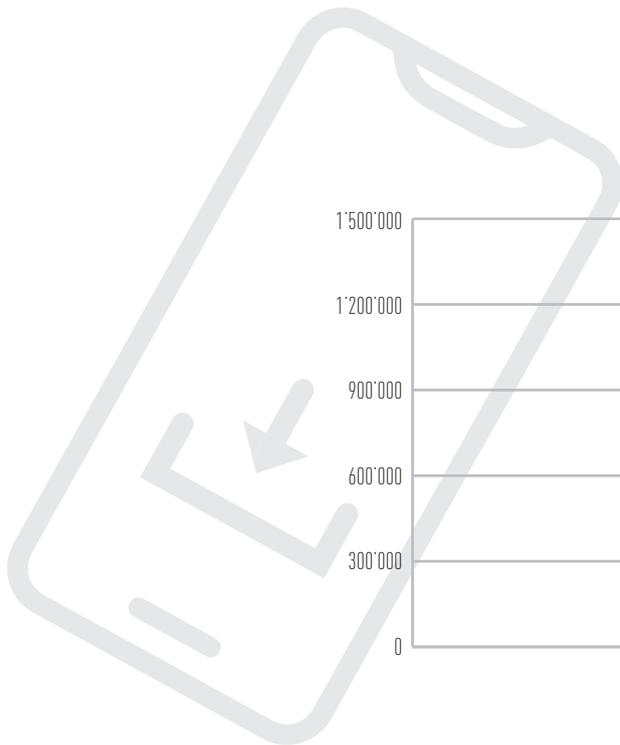
Visits to the SwitzerlandMobility website and smartphone app



Sales figures of official route guides and smartphone app downloads



Official route guides



App downloads (per year)

Sales figures of official route guides. Downloads from the Apple Store and the Google Play Store (per year).

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Hundert Franken
Cent Francs

Der Präsident
des Bankrats

Ein Mitglied
des Direktoriums

UNION NATIONALE
BANQUE NATIONALE
100





**Expenditure
and value added**

Expenditure per user and day on SwitzerlandMobility routes

The expenditure per person and day on SwitzerlandMobility routes on a day tour is around 40 Swiss francs and around 70 Swiss francs as part of a holiday. On multi-day

tours, spending on SwitzerlandMobility routes is around 190 Swiss francs per person per day.

Expenditure on one-day tours without overnight stay vs. multi-day tours or tours as part of a holiday (in Swiss francs)



	Day tour without overnight stay away from home	Day tour as part of a holiday	Multi-day tour
Journey there and back	17.-	11.-	36.-
Public transport while on the move	4.-	4.-	7.-
Food and drink	22.-	27.-	65.-
Overnight stay	-	35.-	107.-
Other (Souvenirs etc.)	1.-	2.-	1.-
Total expenditure	44.-	79.-	216.-



	Day tour without overnight stay away from home	Day tour as part of a holiday	Multi-day tour
Journey there and back	9.-	4.-	30.-
Public transport while on the move	3.-	5.-	4.-
Food and drink	21.-	31.-	69.-
Overnight stay	-	19.-	92.-
Other (Souvenirs etc.)	1.-	2.-	5.-
Total expenditure	29.-	61.-	200.-



	Day tour without overnight stay away from home	Day tour as part of a holiday, multi-day tour
Journey there and back	21.-	39.-
Public transport while on the move	7.-	16.-
Food and drink	27.-	49.-
Overnight stay	-	56.-
Other (Souvenirs etc.)	4.-	11.-
Total expenditure	59.-	171.-



Database: Befragung der Wandernden 2019 (Survey of Hikers 2019). Number of respondents: 2,059 (without huts). The weighted values are listed for expenditure on public transport en route. Veloland-Befragung 2019 (Cycling in Switzerland Survey 2019). Number of respondents: 2,118 (1,097 cycling trips with the purpose of a cycling tour/ trip and with valid data on expenditure). Mountainbikeland-Befragung 2019 (Mountainbiking in Switzerland Survey 2019). Number of respondents: 621 (613 with valid data on expenditure). | Filter: Hiking in Switzerland / Cycling in Switzerland / Mountainbiking in Switzerland routes deliberately chosen | Note: For mountain biking, it was not possible to differentiate between holiday/multi-day tour due to low case numbers.

Projection of revenue generated on SwitzerlandMobility routes

SwitzerlandMobility routes generated more than 1.3 billion Swiss francs in revenue for transport, accommodation and catering in 2019.

Revenue has almost doubled compared to the last survey (2013: 730 million Swiss francs in revenue).

Revenue generated on SwitzerlandMobility routes

	Hiking in Switzerland	Cycling in Switzerland	Mountainbiking in Switzerland
Average expenditure/tour (Swiss francs)	71	89	85
Average number of tours per year and user	5	5	5
Number of Swiss users	1'870'000	1'150'000	270'000
Revenue generated by Swiss users (Swiss francs)	660 mio	510 mio	115 mio
Revenue generated by foreign guests (Swiss francs)	30–40 mio	30 mio	pas recensé
Total revenue 2019 (Swiss francs)	ca. 700 mio	540 mio	ca. 120 mio



Database: Sport Schweiz 2020. Number of respondents: 12,120. Befragung der Wandernden 2019 (Survey of Hikers 2019). Number of respondents: 2,059 (without huts). Veloland-Befragung 2019 (Cycling in Switzerland Survey 2019). Number of respondents: 2,118 (1,097 cycling trips with the purpose of a cycling tour/trip and with valid data on expenditure). Mountainbikeland-Befragung 2019 (Mountainbiking in Switzerland Survey 2019). Number of respondents: 621 (613 with valid data on expenditure). | Filter: Cycling in Switzerland/Hiking in Switzerland/Mountainbiking in Switzerland routes deliberately chosen. | Note: The expenditure by foreign guests could only be roughly estimated for Hiking in Switzerland. No foreign guests were surveyed for Mountainbiking in Switzerland, so this is an estimate.

Accommodation and travel organisation

As was the case in the last survey, hotels are the most important type of accommodation for all types of mobility.

Campsites are also popular for cycling tours, while hikers and mountain bikers often use holiday flats.

Multi-day tours are largely self-organised.

Accommodation ¹



	Hiking in Switzerland	Cycling in Switzerland	Mountainbiking in Switzerland
Hotel	50.0 %	51.5 %	40.0 %
Camping	11.7 %	31.3 %	17.3 %
Rented holiday apartment / house	13.0 %	6.5 %	21.3 %
Private holiday apartment / house	10.0 %	6.5 %	16.0 %
Bed & Breakfast	6.1 %	12.1 %	5.3 %
Acquaintances and relatives	7.0 %	8.9 %	8.0 %
Youth hostel	6.1 %	4.7 %	8.0 %
SAC hut / mountain hut	8.3 %	0.7 %	8.0 %
Farm	3.9 %	3.6 %	2.7 %
Other accommodation	3.5 %	3.1 %	0.0 %



Organisation of multi-day tours ²

	Hiking in Switzerland	Cycling in Switzerland
Self-organised	77 %	89 %
Tour operator	6 %	7 %
Friends, acquaintances	17 %	4 %



¹Database: Befragung der Wandernden 2019 [Survey of Hikers 2019]. Number of respondents: 2,092 (without huts). Veloland-Befragung 2019 [Cycling in Switzerland Survey 2019]. Number of respondents: 2,118. Mountainbikeland-Befragung 2019 [Mountainbiking in Switzerland Survey 2019]. Number of respondents: 621. | Filter: Hiking in Switzerland / Cycling in Switzerland / Mountainbiking in Switzerland routes deliberately chosen.

²Database: Befragung der Wandernden 2019 [Survey of Hikers 2019]. Number of respondents: 2,092 (without huts, 170 multi-day hikes). Veloland-Befragung 2019 [Cycling in Switzerland Survey 2019]. Number of respondents: 2,118 (394 cyclists on multi-day tours) | Filter: Multi-day tour, Hiking in Switzerland / Cycling in Switzerland / Mountainbiking in Switzerland routes deliberately chosen. | Note: Mountain bike not evaluated due to insufficient number of cases.





Sport Schweiz 2020 (Sport Switzerland 2020)

The representative population survey "Sport Schweiz" is carried out every 6 years - supported by the Federal Office of Sport FOSPO together with Swiss Olympic, the Swiss Council for Accident Prevention (BFU) and the Swiss National Accident Insurance Fund (Suva). Number of respondents: 12,120. Survey method: mixed mode (choice between computer assisted telephone interview (CATI) or computer aided web interviewing (CAWI). Survey period: 7 March to 17 August 2019. Response rate: 51 %.

On behalf of SwitzerlandMobility and the Swiss Hiking Federation, all persons who indicated hiking, cycling or mountain biking as a sport and exercise activity were asked additional questions about their knowledge and usage of the routes of Hiking in Switzerland/Cycling in Switzerland/Mountainbiking in Switzerland.

In addition, 810 people were given an additional module on awareness of SwitzerlandMobility.

Survey of hikers 2019

Survey commissioned by the umbrella organisation of the Swiss Hiking Federation, supported by the Federal Roads Office FEDRO. Field research with subsequent online survey. Hiking trail network selected as the location. Survey by Polyquest AG and the Swiss Hiking Federation. Evaluation by Lamprecht und Stamm Sozialforschung und Beratung AG. Survey period: 30 May to 22 September 2019. Number of respondents: 2,610. Response rate: 52%.

Cycling in Switzerland survey 2019

Survey commissioned by the SwitzerlandMobility Foundation, supported by the Federal Roads Office FEDRO. Field research with subsequent online survey. 76 locations on Cycling in Switzerland network. Survey by Polyquest AG. Evaluation by Lamprecht und Stamm Sozialforschung und Beratung AG. Survey period: 30 May to 22 September 2019. Number of respondents: 2,118. Response rate: 55%.

Mountainbiking in Switzerland survey 2019

Online survey commissioned by the SwitzerlandMobility Foundation. Survey by Polyquest AG. Evaluation by Lamprecht und Stamm Sozialforschung und Beratung AG. The participants of the survey were recruited via online access panels of two panel providers. Number of respondents: 621

