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# AI Visibility Report

A neutral AI-visibility study of the Netherlands bicycle and e-bike market: 1,123 analyzed responses from five AI assistants answering 45 Dutch-language questions, ranking the most-named entities across nine cuts.

| 1,123 | 45 | 222 | 19 | 9 |
|---|---|---|---|---|
| Responses Analyzed | Questions Asked | Entities Tracked | Qualified Entities | Published Cuts |

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KEY FINDINGS

# At a glance

This report reproduces the real Dutch-language questions people ask AI assistants about bicycles and e-bikes, and measures how often, in what order, and across how many models five large language models name each entity.

1. **Gazelle** leads the general leaderboard at 94.31, named in 594 of 1,123 analyzed responses (52.89%) by all five models. Cube (73.04) and Batavus (69.27) follow, and 19 of 218 matched entities cleared the 5% threshold.
2. The most-named entity in the study is not a bicycle brand. **Bosch** appears in 626 of 1,123 responses (55.74%), more than any bicycle brand, and is classified Adjacent and excluded from the ranking.
3. **Origin depends on the question.** On the 34 origin-neutral questions (848 responses) 7 of 20 qualifiers are Dutch and Dutch brands take 40.0% of the top ten; on the 11 questions that demand a Dutch brand (275 responses), 15 of 19 are Dutch by construction.
4. The models disagree about how much to say, not about who leads. **Grok names 9.10 Core entities per response against GPT-5.6's 3.25**, and grounding runs from Gemini's 41.8% to 100% for three models against an 85.6% overall rate.
5. **Segment leadership splits three ways** — Gazelle in everyday, Cube in sport, Urban Arrow in cargo — but all 15 attribute questions sit in one segment, so segment leaderboards are indicative only.

SCOPE & METHOD

Vertical: bicycles & e-bikes (fietsen & e-bikes), Netherlands. Method: a single point-in-time study of 1,125 responses across five large language models (Claude, Gemini, GPT, Perplexity, Grok), each asked 45 Dutch-language questions five times; 1,123 were analyzed. Collection window: 5 September 2026.

HOW TO READ THIS REPORT — VISIBILITY IS NOT QUALITY

Every number here measures whether an AI assistant *names* an entity, and how early. It does not measure whether the product is well made, whether it lasts, whether the price is fair, or whether the recommendation was accurate. A brand can be highly visible and mediocre, or excellent and invisible. Read the leaderboards as a map of findability in a new discovery channel — nothing more.

**Key terms:** AI visibility, AI Visibility Score, bicycle brands, e-bike brands, fietsen, elektrische fietsen, bakfiets, longtail, speed pedelec, Dutch bicycle brands, LLM brand recommendations, ChatGPT/Gemini/Claude/Perplexity/Grok brand recommendation, Generative Engine Optimization (GEO).

Because the same questions can be read with or without an origin restriction, because the market divides into genuinely different product formats, and because a question about a motor is not the same as a question about a bike, the entities are ranked in nine separate cuts, defined in Chapter 2. It is a single point-in-time study and should be read within the limitations in Chapter 11.

CONTENTS

# Report contents

01 Executive Summary 04
02 Methodology 07
03 Overall Visibility Leaderboard 12
04 Origin: The Constrained and Origin-Neutral Shelves 16
05 Differences Between Models 20
06 Question-Type Ownership 23
07 Segment Leaderboards 27
08 Components and Adjacent Brands 31
09 The Source Ecosystem 34
10 What the Patterns Suggest 37
11 Limitations and Notes 39
12 Appendix & Data 43

01

SECTION 01

# Executive Summary

Gazelle leads the Dutch bicycle shelf in seven of nine cuts, but the single most-named entity in the entire study is a motor manufacturer that sits outside the ranking by design.

EXECUTIVE SUMMARY

# One leader, nine cuts, and a motor manufacturer above them all

ONE-SENTENCE TAKEAWAY

**Gazelle leads the Dutch bicycle shelf in seven of nine cuts, but the single most-named entity in the entire study is a motor manufacturer that sits outside the ranking by design.**

1. **Gazelle leads decisively.** It tops the general leaderboard at 94.31, appearing in 594 of 1,123 analyzed responses (52.89%) and named by all five models. Cube (73.04, on 407 of 1,123) and Batavus (69.27, on 394 of 1,123) follow, and the gap from first to second is 21.26 points — wider than the gap from second to eleventh.

2. **19 entities qualified for the general ranking.** Of 222 dictionary entities, 218 matched at least one response, and 19 Core entities cleared the 5% mention threshold across all 45 questions: 10 Dutch and 9 foreign. Their average score is 53.8, and 17 of the 19 are named by all five models.

3. **The most-named entity is a component brand.** Bosch appears in 626 of 1,123 responses (55.74%), more than any bicycle brand in the study. It is classified *Adjacent*, reported in Chapter 8, and deliberately excluded from every leaderboard. Shimano (460 responses, 40.96%) would rank second on the same basis. Ranking motors against bicycles would have made the leaderboard a table about drivetrains.

4. **Origin depends entirely on which questions you count.** On the 34 origin-neutral questions (848 responses), 7 of 20 qualifiers are Dutch and Dutch brands take 40.0% of the top ten. On the 11 questions that explicitly ask for a Dutch brand (275 responses), 15 of 19 qualifiers are Dutch and Dutch brands take 90.0% of the top ten — by construction of the question set, not as a finding. The two figures are printed together everywhere in this report and neither is quoted alone.

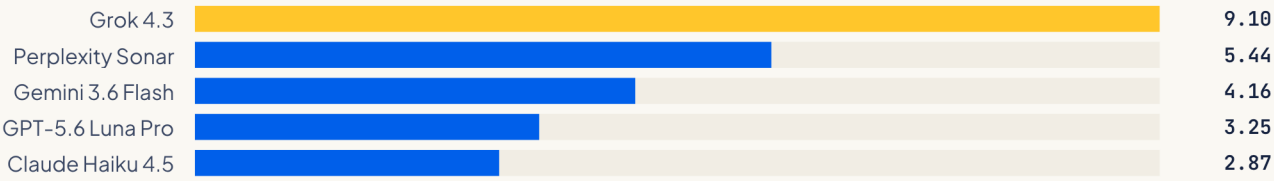
5. **The origin-neutral shelf is genuinely contested.** Cube is named in 382 of 848 origin-neutral responses against Gazelle's 381 — a one-response difference — and Gazelle keeps the top score only on position and breadth. This is the one cut in the study where the domestic leader does not lead on reach.

6. **Position can outrank reach.** Urban Arrow ranks fourth in the general cut on a mention rate of 7.12% (80 of 1,123), because when it is named it is named first: it holds the general-cut position maximum at an MRR of 0.6744. The composite is working as designed, but the underlying numbers should be read alongside the score.

7. **The models differ far more in how much they say than in whom they name.** Grok names 9.10 Core entities per response against GPT-5.6's 3.25, and Grok mentions Gazelle in 78.7% of its answers against Claude Haiku's 24.4%. Every model puts Gazelle first among Core entities. Grounding runs from 41.8% for Gemini to 100% for three models, against an overall rate of 85.6%.

8. **Three segments, three leaders, one caveat.** Gazelle leads everyday & commuting (100.00), Cube leads sport & recreational (97.74) and Urban Arrow leads cargo, family & special formats (85.79). All 15 attribute questions fall in the everyday segment and the other two carry none, so segment leaderboards are indicative only and entity counts must not be compared across them.

CHART 01 · CORE ENTITIES NAMED PER RESPONSE, BY MODEL




## Why it matters

Discovery is moving from search engines and marketplaces toward AI assistants, and the Netherlands is an unusual place to watch that happen: bicycles are ordinary infrastructure here rather than a specialist purchase, and the questions people ask reflect that — commuting distances, battery range in headwind, whether parts will still be available in five years. This edition asks a narrow question about it: when someone types a Dutch question into an assistant, whose name comes back, and how early. It is the first (baseline) snapshot, so there is no prior edition to compare against and none is implied anywhere in this report. One reminder: the numbers describe visibility and information availability, not which bicycles are best.

02

SECTION 02

# Methodology

Five large language models were each asked 45 Dutch questions five times with no system prompt, producing 1,125 responses of which 1,123 were analyzed; entities were ranked with a three-component (45/30/25) score computed separately within each of nine cuts.

METHODOLOGY

# How the study was run

ONE-SENTENCE TAKEAWAY

**Five large language models were each asked 45 Dutch questions five times with no system prompt, producing 1,125 responses of which 1,123 were analyzed; entities were identified by alias matching plus human-gated research and ranked with a three-component (45/30/25) score computed separately within each of nine cuts.**

## 2.1 SCOPE AND MODELS

The study queried five large language models directly via API with identical questions. All models received only the user question. No system prompt was used, temperature was not set manually (provider default), and no region or locale parameter was defined. Because the questions are in Dutch, the models infer the Netherlands market from language alone.

45 questions × 5 models × 5 repeats produced **1,125 responses collected**. Two responses returned a *completed* status with empty text and are excluded from every denominator, giving **1,123 responses analyzed**. Denominators are computed per (question, model) cell, never as questions × models × repeats, which is why the per-model denominators are not all 225.

TABLE 01 · PER-MODEL BEHAVIOUR

1,123 analyzed responses

| Model | API name | Resp. | Grounded | Distinct | Core | Per resp. | Core / resp. |
|---|---|---|---|---|---|---|---|
| **Claude Haiku 4.5** | anthropic/claude-haiku-4.5 | 225 | 100.0% | 105 | 79 | 4.50 | 2.87 |
| **Gemini 3.6 Flash** | gemini-3.6-flash | 225 | 41.8% | 112 | 87 | 6.55 | 4.16 |
| **GPT-5.6 Luna Pro** | openai/gpt-5.6-luna-pro | 223 | 86.2% | 89 | 62 | 5.08 | 3.25 |
| **Perplexity Sonar** | perplexity/sonar | 225 | 100.0% | 143 | 113 | 6.85 | 5.44 |
| **Grok 4.3** | x-ai/grok-4.3 | 225 | 100.0% | 174 | 127 | 12.91 | 9.10 |

## 2.2 WEB-SEARCH CONFIGURATION AND GROUNDING

No model was instructed to search. Grounding is whatever each provider does by default, and the spread is the widest this series has recorded: **85.6% of all 1,123 responses were web-grounded**, but that average conceals Claude Haiku, Perplexity and Grok at 100%, GPT-5.6 at 86.2%, and **Gemini at 41.8%**. Because grounding differs so sharply by model, and so does answer breadth, breadth carries only 25% of the composite score. Chapter 5 treats the spread as a finding in its own right.

## 2.3 QUESTIONS AND CUTS

Questions are written the way Dutch consumers actually ask them, including colloquial phrasing, English loanwords, abbreviations and imperfect grammar. No question was rewritten and none was removed because its answers were inconvenient: *new_text* equals *original_text* for all 45 questions, and every quotation in this report reproduces the question as asked. All 45 appear in Dutch with English glosses in Chapter 12.

Nine cuts are published. There is **no trend cut** in this edition, because there is no prior edition to trend against.

TABLE 02 · THE NINE CUTS

questions, denominators, qualified Core entities

| Cut | Questions | Denominator | Qualified Core | Leader |
|---|---|---|---|---|
| **General** | 45 | 1,123 | 19 | **Gazelle** |
| Dutch-brand questions | 11 | 275 | 19 | Gazelle |
| Origin-neutral questions | 34 | 848 | 20 | Gazelle |
| Everyday & commuting | 29 | 724 | 18 | Gazelle |
| Sport & recreational | 8 | 200 | 19 | Cube |
| Cargo, family & special formats | 8 | 199 | 37 | Urban Arrow |
| Discovery | 15 | 375 | 28 | Gazelle |
| Attribute | 15 | 375 | 22 | Gazelle |
| Use case | 15 | 373 | 24 | Gazelle |

Every question belongs to exactly one segment, exactly one question type, and exactly one origin scope, so each of the 45 questions contributes to four of the nine cuts: general, one of local/open, one segment and one type. Question 45 — *"Zijn er goede Nederlandse merken voor een elektrische bakfiets of longtail waarmee ik twee kinderen en boodschappen kan meenemen?"* — is a local, use-case, cargo question, and its 25 responses sit in the general, local, use-case and cargo denominators and nowhere else.

THE DENOMINATORS RECONCILE THREE WAYS

local (275) plus open (848) equals general (1,123); the three segment cuts (724 + 200 + 199) sum to 1,123; and the three question-type cuts (375 + 375 + 373) sum to 1,123. Every entity's response counts decompose the same way.

### 2.4 ENTITY RESOLUTION

Candidates were extracted from the analyzed responses after stripping markdown link targets, bare URLs, domain-style anchors and citation markers, so that source domains could not inflate brand mentions. 9,157 raw surface forms were reduced to 2,137 candidates reaching a floor of ≥3 responses. Mechanical curation sent **211** of those to human-gated research and dropped **1,926**, each with a stated reason and the statistic the rule fired on.

The drop list is worth reading, because it shows what a Dutch-language corpus does to capitalization heuristics. *Nederlandse* was dropped at 415 responses and *Nederland* at 342 as nationality terms; *Wh* at 406 and *Nm* at 253 as unit abbreviations; *Bosch Performance* at 213 as a product designation sitting under its parent. *Riese Müller* was dropped at 202 responses as a markdown artefact with no clean-text occurrence.

Three backstop passes then recovered entities the generator had missed, and the failures fall into four classes.

- **Sub-brands demoted as model names.** Rockrider and B'TWIN were dropped as Decathlon product designations — Rockrider because 86% of its occurrences directly followed another proper name — while Elops and Van Rysel survived. Sub-brands count independently in this series; the rule was wrong and both were restored.
- **Brand names that are domain forms.** Bakfiets.nl, Bol.com, Fiets.nl and Fietsenwinkel.nl were removed by URL stripping before candidate generation. They are now protected before stripping and matched as aliases.
- **Lowercase-styled and vocabulary-colliding names.** biXbi and iMove never surfaced as capitalized runs; Mantel collides with an ordinary Dutch noun.

- **Names containing an ampersand.** Riese & Müller never existed as a candidate at all. It entered the dictionary only as a promoted merge target, inheriting the response sets of *Riese*, *R&M* and *Supercharger*, and finished 8th in the general cut on 225 responses. A top-ten entity was invisible to the extractor for a reason that had nothing to do with the market.

The largest single retailer miss was **12GO Biking, named in 46 responses**. It does not clear the general-cut threshold (4.10%) and qualifies only in the attribute, discovery and everyday cuts.

251 candidates were researched in total: 212 Keep, 32 Merge, 7 Drop. Eleven merge targets did not exist as candidates and were promoted to canonical entities inheriting the merged response sets. **The final dictionary holds 222 entities carrying 437 aliases** — Core 166, Adjacent 32, Out-of-scope 24.

**Four dictionary entities matched zero responses**, which is why 218 entities appear in the metrics and 222 in the dictionary. All four are Out-of-scope non-brands, so no leaderboard, cut or origin share is affected. Three of them are publications whose *domains* are cited heavily even though their names are never written in the answer text: *elektrischefietser.nl* is cited in 61 responses, *bicycling.nl* in 57 and *bestebike.be* in 4. Bikefixr is neither named nor cited. The gap between "cited as a source" and "named as an entity" is real and this is what it looks like.

MATCHING RULE

Matching is alias-based, Unicode-normalized (NFC), case-insensitive, URL-stripped and anchored on word boundaries with tolerance for spacing and hyphen variants. Unrestricted substring matching is not used. Dutch compounds are handled only through registered aliases: forms such as Bosch-motor, Gazelle-dealers and Gates-riem were observed in the corpus and added explicitly. All 142 aliases of six characters or fewer were inspected with in-context samples; ART (the Dutch lock certification of Stichting ART), AD (the newspaper Algemeen Dagblad) and NS (the railway operator, in the context of folding-bike luggage rules) were retained as Out-of-scope entities that cannot affect a leaderboard.

### 2.5 THE AI VISIBILITY SCORE (0-100)

$$\text{Score} = 0.45 \times \text{Mention} + 0.30 \times \text{Position (MRR)} + 0.25 \times \text{Breadth}$$

Per entity, per cut: *mention_rate* is responses ÷ denominator; *mrr* is the mean reciprocal of the rank of first mention, over the responses naming the entity; *breadth* is the number of distinct models; an entity qualifies at a mention rate of 5% or more. Each component is scaled against the maximum held by a qualified Core entity in the same cut, and an entity is counted **once per response**, at its earliest mention.

**Scale basis: qualified Core entities within the cut.** This is not a market-wide basis, and the reason is the whole shape of this vertical. Bosch appears in 626 responses, more than any bicycle brand. Had the scale been drawn from all entities, every bicycle brand in the Netherlands would have been scored against a German motor manufacturer, and the leaderboard would have measured how close each brand came to a component. Adjacent entities are scored on the same published scale and are therefore free to exceed 100: Bosch reaches **105.39** on c_mention in the general cut. Those values are reported and never clipped; 41 component values across the study exceed 100, the highest being Kymco at 172.33 on c_position in the everyday segment.

**Worked example, general cut.** Gazelle has a mention rate of 0.5289 against a cut maximum of 0.52894, giving c_mention = 100.00. Its MRR is 0.5464 against a cut maximum of 0.67442, held by Urban Arrow, giving c_position = 81.02. It appears in all 5 models, so c_breadth = 100.00. The composite is 0.45 × 100.00 + 0.30 × 81.02 + 0.25 × 100.00 = **94.31**.

**The leader does not reach 100 unless one entity tops all three components.** In the general cut it does not, and that is expected behavior rather than an error. Gazelle does reach exactly 100.00 in the local, attribute and everyday cuts, where it holds both the mention and position maxima.

METHOD NOTE

Scores are component-scaled inside their own cut. A score of 94.31 in the general cut and a score of 94.31 in the cargo cut describe different absolute levels of visibility, because the scale moves whenever the leader moves. Never compare ai_score across cuts, editions or verticals — use mention_rate, mrr and breadth.

### 2.6 ORIGIN, NEUTRALITY AND SELF-EXCLUSION

Origin is **trademark ownership**, researched per entity and stored as *origin_trademark*. **Local means the trademark country is the Netherlands.** Belgium and Germany are Foreign. Benelux is not a rollup and does not appear as one in this report. A .nl domain, Dutch-language marketing, Dutch retail availability, a Dutch importer or a Dutch subsidiary do not make an entity Dutch. Tables use ISO country codes; the mapping from the full country names stored in the data pack was applied at render time, and the full names appear in the entity index. The domestic/foreign rollup is used for shares only.

Both trademark and operator country were collected for every entity, so the classification can be revisited later without repeating entity research. **Nine entities have Unknown trademark origin.** They are excluded from origin shares and retained in every other metric; none of them qualifies in any cut, so no published share moves either way.

Marketplaces and retailers are ranked in every published leaderboard, because they are what the assistants actually name. The *_brandonly* companion view strips five marketplaces by name — Alltricks, BikeFair, Bol.com, Marktplaats and Refurbed — and retains own-label and vertically integrated retailers everywhere.

SELF-EXCLUSION

The publisher's own domain was checked for in the cited-source data and does not appear, so no exclusion was applied and no citations were removed.

### 2.7 WHAT A FUTURE EDITION WILL AND WILL NOT BE ABLE TO COMPARE

This is edition 1. There is no prior Netherlands edition, so this report contains no cross-edition comparison and does not gesture at one. When edition 2 arrives, mention_rate, mrr, breadth and raw response counts will be directly comparable, as will the source mix, the per-model behavior table and the question set, which is held constant. **ai_score will not be comparable**, because the scale is redrawn from whichever entities qualify in the new cut. If the leader changes, or if a new entity clears the threshold, every score in the table moves without anyone's visibility having changed.

03

SECTION 03

# Overall Visibility Leaderboard

Nineteen entities cleared the 5% threshold across all 45 questions, Gazelle leads by 21 points, and four of the top fifteen are named far more often than their rank on reach alone would suggest.

OVERALL VISIBILITY LEADERBOARD

# Nineteen qualified entities, one clear leader

ONE-SENTENCE TAKEAWAY

Nineteen entities cleared the 5% threshold across all 45 questions, Gazelle leads by 21 points, and four of the top fifteen are named far more often than their rank on reach alone would suggest.

## 3.1 General leaderboard: 19 qualified entities

TABLE 03 · GENERAL CUT

all 45 questions · 1,123 analyzed responses

| # | Entity | Origin | Resp. | Mention | MRR | Breadth | AI Score |
|---|---|---|---|---|---|---|---|
| 1 | **Gazelle** | NL | 594 | 52.89% | 0.5464 | 5/5 | 94.31 |
| 2 | Cube | Foreign | 407 | 36.24% | 0.3869 | 5/5 | 73.04 |
| 3 | Batavus | NL | 394 | 35.08% | 0.3243 | 5/5 | 69.27 |
| 4 | Urban Arrow | NL | 80 | 7.12% | 0.6744 | 5/5 | 61.06 |
| 5 | Trek | Foreign | 245 | 21.82% | 0.3268 | 5/5 | 58.10 |
| 6 | Tenways | NL | 136 | 12.11% | 0.4686 | 5/5 | 56.15 |
| 7 | Giant | Foreign | 239 | 21.28% | 0.2862 | 5/5 | 55.84 |
| 8 | Riese & Müller | Foreign | 225 | 20.04% | 0.2860 | 5/5 | 54.77 |
| 9 | Koga | NL | 219 | 19.50% | 0.2760 | 5/5 | 53.87 |
| 10 | Sparta | NL | 224 | 19.95% | 0.2313 | 5/5 | 52.26 |
| 11 | Cortina | NL | 183 | 16.30% | 0.2525 | 5/5 | 50.09 |
| 12 | Canyon | Foreign | 94 | 8.37% | 0.3947 | 5/5 | 49.68 |
| 13 | Specialized | Foreign | 136 | 12.11% | 0.2896 | 5/5 | 48.18 |
| 14 | Kalkhoff | Foreign | 151 | 13.45% | 0.2451 | 5/5 | 47.34 |
| 15 | VanMoof | NL | 62 | 5.52% | 0.3692 | 5/5 | 46.12 |
| 16 | Decathlon | Foreign | 100 | 8.90% | 0.2361 | 5/5 | 43.08 |
| 17 | QWIC | NL | 62 | 5.52% | 0.2490 | 5/5 | 40.77 |
| 18 | Stella | NL | 78 | 6.95% | 0.1790 | 4/5 | 33.87 |
| 19 | Upway | Foreign | 73 | 6.50% | 0.1858 | 4/5 | 33.79 |

**Tiers.** The board separates into four. Gazelle stands alone at 94.31. A second tier of Cube (73.04) and Batavus (69.27) sits 21 to 25 points below it. A long third tier runs from Urban Arrow (61.06) down to Decathlon (43.08), thirteen entities inside eighteen points, where rank is decided by fractions and small movements would reorder it. A fourth tier of QWIC (40.77), Stella (33.87) and Upway (33.79) sits at the threshold, and the last two are the only qualifiers not named by all five models.

**Seventeen of the nineteen appear in all five models.** That is a high-agreement market by this series' standards: the assistants differ over how many names to give, not over which names are legitimate.

**The composition is not what a bicycle-market ranking would look like.** Fourteen of the nineteen are conventional brands; three are brand-retailer hybrids that sell their own product directly (Tenways, Canyon, Stella); and two are pure retailers (Decathlon, Upway). No marketplace qualifies in the general cut. The retailers are here because assistants answering "where do I buy this" name a shop, and stripping them would describe a shelf that no user is shown.

## 3.2 The same cut, ranked by mention rate

TABLE 04 · GENERAL CUT BY MENTION RATE

reach only · 1,123 responses

| # | Entity | Origin | Resp. | Mention rate | Composite |
|---|---|---|---|---|---|
| 1 | Gazelle | NL | 594 | 52.89% | #1 |
| 2 | Cube | Foreign | 407 | 36.24% | #2 |
| 3 | Batavus | NL | 394 | 35.08% | #3 |
| 4 | Trek | Foreign | 245 | 21.82% | #5 |
| 5 | Giant | Foreign | 239 | 21.28% | #7 |
| 6 | Riese & Müller | Foreign | 225 | 20.04% | #8 |
| 7 | Sparta | NL | 224 | 19.95% | #10 |
| 8 | Koga | NL | 219 | 19.50% | #9 |
| 9 | Cortina | NL | 183 | 16.30% | #11 |
| 10 | Kalkhoff | Foreign | 151 | 13.45% | #14 |
| 11 | Tenways | NL | 136 | 12.11% | #6 |
| 12 | Specialized | Foreign | 136 | 12.11% | #13 |
| 13 | Decathlon | Foreign | 100 | 8.90% | #16 |
| 14 | Canyon | Foreign | 94 | 8.37% | #12 |
| 15 | Urban Arrow | NL | 80 | 7.12% | #4 |
| 16 | Stella | NL | 78 | 6.95% | #18 |
| 17 | Upway | Foreign | 73 | 6.50% | #19 |
| 18 | VanMoof | NL | 62 | 5.52% | #15 |
| 19 | QWIC | NL | 62 | 5.52% | #17 |

Reordering by reach alone moves four entities substantially. **Urban Arrow falls from 4th to 15th**, Tenways from 6th to 11th and Canyon from 12th to 14th, while Sparta rises from 10th to 7th and Kalkhoff from 14th to 10th. The pattern is consistent: the entities that gain from the composite are ones the models name *early* in a narrower set of answers, and the entities that lose are ones named *often* but late in a list. Neither ordering is more correct; they answer different questions, and both are published for that reason.

### 3.3 Brand-only view (marketplaces removed)

Removing the five named marketplaces changes the general leaderboard not at all: **no marketplace qualifies in the general cut**, and none qualifies in seven of the other eight. The single exception is Marktplaats, which qualifies 20th of 37 in the cargo segment on 14 of 199 responses. The brand-only companion tables are published for consistency with the rest of the series, and the honest summary of them in this edition is that they are identical to the published boards everywhere except one segment.

That is itself a finding. In the Turkish markets this series has covered, marketplaces dominate the assistants' answers. In the Dutch bicycle market they barely appear: the retail names the models reach for are specialist bike shops and e-bike webshops, not general marketplaces.

### 3.4 Above the threshold but off the board

Four Out-of-scope entities clear 5% in at least one cut and are correctly excluded from every leaderboard, because they are not entities a shopper can buy.

TABLE 05 · OUT-OF-SCOPE ENTITIES CLEARING THE THRESHOLD — excluded from every leaderboard

| Entity | What it is | Resp. | Mention rate | Cuts qualified |
|---|---|---|---|---|
| ANWB | Non-brand | 217 | 19.32% | 9 of 9 |
| Accell | Non-brand | 26 | 2.32% | 2 of 9 |
| Algemeen Dagblad | Non-brand | 32 | 2.85% | 2 of 9 |
| Consumentenbond | Non-brand | 133 | 11.84% | 8 of 9 |

**ANWB** appears in 217 of 1,123 responses (19.32%) and on responses alone would sit just below Koga, ninth of the nineteen, if it were rankable; **Consumentenbond** appears in 133 (11.84%). Both are consumer organizations whose bicycle tests the models cite constantly, and their presence says something about the Dutch information environment that a brand leaderboard cannot: when an assistant is asked which e-bike is reliable, it often reaches for a testing body before it reaches for a manufacturer.

**Accell** is the awkward one. It is classified Non-brand / Out-of-scope because consumers do not buy an Accell, but it owns Gazelle, Batavus, Koga and Sparta — four of the ten Dutch entities on the general board. It qualifies in the local and attribute cuts on two of five models. Readers who want a corporate view of the market should note that four leaderboard rows share one owner; this report ranks the names the assistants say, not the groups behind them.

### 3.5 Below the threshold

The 19 qualifiers are drawn from **166 Core entities**, so 147 Core entities were named at least once and did not clear 5% of 1,123 responses. They are published in full in the data pack rather than summarized away, because the tail is where a baseline edition is most useful: it is the list against which edition 2 will be read.

Two properties of that tail are worth stating now. First, an unqualified entity is scored against a scale it did not help set, so its components can exceed 100 without anything being wrong — the qualification threshold decides who defines the scale, not who is measured on it. Second, the tail is long and shallow: no unqualified Core entity in the general cut reaches 5% of 1,123 responses by definition, which means every one of them sits below 57 responses, and most sit far below it. A brand appearing in 40 answers out of 1,123 is genuinely present in this channel and genuinely invisible in it, and both halves of that sentence are true at once.

04

SECTION 04

# Origin: The Constrained and Origin-Neutral Shelves

Dutch brands take 40.0% of the origin-neutral top ten and 90.0% of the constrained top ten, and only the first of those figures says anything about visibility.

ORIGIN

# Two shelves, and only one of them is evidence

ONE-SENTENCE TAKEAWAY

**Dutch brands take 40.0% of the origin-neutral top ten and 90.0% of the constrained top ten, and only the first of those figures says anything about visibility.**

Eleven of the 45 questions explicitly ask for a Dutch brand — *"ik zoek een degelijk Nederlands fietsmerk"*, *"Wat is een goed Nederlands e-bikemerk als prijs-kwaliteit belangrijker is dan luxe?"* — and 34 do not. The two sets are reported separately and always together, because the constrained set cannot be used to argue that Dutch brands are more visible: it was built to return them.

TABLE 06 · THE TWO ORIGIN CUTS SIDE BY SIDE

34 open questions · 11 local questions

| | Origin-neutral (open) | Dutch-brand (local) |
|---|---|---|
| Questions | 34 | 11 |
| Analyzed responses | 848 | 275 |
| Qualified Core entities | 20 | 19 |
| Dutch qualifiers | 7 | 15 |
| Foreign qualifiers | 13 | 4 |
| Dutch share of top ten | 40% | 90% |

## 4.1 The origin-neutral shelf (34 questions, 848 responses)

TABLE 07 · ORIGIN-NEUTRAL CUT

34 questions · 848 analyzed responses

| # | Entity | Origin | Resp. | Mention | MRR | Breadth | AI Score |
|---|---|---|---|---|---|---|---|
| 1 | **Gazelle** | NL | 381 | 44.93% | 0.4566 | 5/5 | 89.66 |
| 2 | Cube | Foreign | 382 | 45.05% | 0.3922 | 5/5 | 86.99 |
| 3 | Trek | Foreign | 243 | 28.66% | 0.3288 | 5/5 | 67.87 |
| 4 | Giant | Foreign | 225 | 26.53% | 0.2844 | 5/5 | 63.83 |
| 5 | Batavus | NL | 221 | 26.06% | 0.2638 | 5/5 | 62.46 |
| 6 | Riese & Müller | Foreign | 208 | 24.53% | 0.2734 | 5/5 | 61.35 |
| 7 | Urban Arrow | NL | 53 | 6.25% | 0.6925 | 5/5 | 61.24 |
| 8 | Tenways | NL | 116 | 13.68% | 0.5069 | 5/5 | 60.62 |
| 9 | Specialized | Foreign | 133 | 15.68% | 0.2930 | 5/5 | 53.36 |
| 10 | Canyon | Foreign | 94 | 11.08% | 0.3947 | 5/5 | 53.17 |
| 11 | Kalkhoff | Foreign | 149 | 17.57% | 0.2450 | 5/5 | 53.17 |
| 12 | Koga | NL | 125 | 14.74% | 0.2471 | 5/5 | 50.43 |

(cont.)

| # | Entity | Origin | Resp. | Mention | MRR | Breadth | AI Score |
|---|---|---|---|---|---|---|---|
| 13 | Tern | Foreign | 46 | 5.42% | 0.4131 | 5/5 | 48.32 |
| 14 | Decathlon | Foreign | 97 | 11.44% | 0.2376 | 5/5 | 46.72 |
| 15 | Sparta | NL | 109 | 12.85% | 0.1963 | 5/5 | 46.34 |
| 16 | Cortina | NL | 86 | 10.14% | 0.2272 | 5/5 | 44.98 |
| 17 | Cannondale | Foreign | 55 | 6.49% | 0.2697 | 5/5 | 43.17 |
| 18 | Merida | Foreign | 55 | 6.49% | 0.2218 | 5/5 | 41.09 |
| 19 | Fiido | Foreign | 44 | 5.19% | 0.2122 | 5/5 | 39.37 |
| 20 | Upway | Foreign | 61 | 7.19% | 0.2044 | 4/5 | 36.04 |

Twenty entities qualify: **7 Dutch and 13 foreign**, with Dutch brands taking 40.0% of the top ten. This is the valid origin comparison in this report, and it describes a market where the domestic industry leads but does not dominate.

The detail that matters most is at the top. **Cube is named in 382 of 848 origin-neutral responses and Gazelle in 381** — a single response apart, and the mention maximum in this cut belongs to Cube, not to Gazelle. Gazelle holds the top composite (89.66 against 86.99) on position and breadth alone. Take away the origin clause and the Dutch leader's advantage over a German competitor comes down to one answer in eight hundred.

Below the top two, the foreign presence is broad rather than concentrated: Trek, Giant, Riese & Müller, Specialized, Canyon, Kalkhoff, Tern, Decathlon, Cannondale, Merida and Fiido all qualify, spanning the United States, Taiwan, Germany, France and China. Nineteen of the twenty are named by all five models.

## 4.2 The constrained shelf (11 questions, 275 responses)

TABLE 08 · DUTCH-BRAND CUT

11 questions · 275 analyzed responses

| # | Entity | Origin | Resp. | Mention | MRR | Breadth | AI Score |
|---|---|---|---|---|---|---|---|
| 1 | **Gazelle** | NL | 213 | 77.45% | 0.7071 | 5/5 | 100.00 |
| 2 | Batavus | NL | 173 | 62.91% | 0.4015 | 5/5 | 78.58 |
| 3 | Sparta | NL | 115 | 41.82% | 0.2645 | 5/5 | 60.52 |
| 4 | Koga | NL | 94 | 34.18% | 0.3145 | 5/5 | 58.20 |
| 5 | Urban Arrow | NL | 27 | 9.82% | 0.6390 | 5/5 | 57.81 |
| 6 | Cortina | NL | 97 | 35.27% | 0.2748 | 5/5 | 57.15 |
| 7 | Veloretti | NL | 32 | 11.64% | 0.5129 | 5/5 | 53.52 |
| 8 | Bakfiets.nl | NL | 20 | 7.27% | 0.4038 | 5/5 | 46.35 |
| 9 | VanMoof | NL | 32 | 11.64% | 0.4267 | 4/5 | 44.86 |
| 10 | Riese & Müller | Foreign | 17 | 6.18% | 0.4396 | 4/5 | 42.24 |
| 11 | Cube | Foreign | 25 | 9.09% | 0.3053 | 4/5 | 38.23 |

(cont.)

| # | Entity | Origin | Resp. | Mention | MRR | Breadth | AI Score |
|---|---|---|---|---|---|---|---|
| 12 | Stella | NL | 44 | 16.00% | 0.2054 | 4/5 | 38.01 |
| 13 | Giant | Foreign | 14 | 5.09% | 0.3137 | 4/5 | 36.27 |
| 14 | Dutch ID | NL | 23 | 8.36% | 0.2487 | 4/5 | 35.41 |
| 15 | Lovens | NL | 14 | 5.09% | 0.2884 | 4/5 | 35.19 |
| 16 | QWIC | NL | 36 | 13.09% | 0.1697 | 4/5 | 34.81 |
| 17 | Tenways | NL | 20 | 7.27% | 0.2468 | 4/5 | 34.69 |
| 18 | Santos | NL | 14 | 5.09% | 0.2521 | 4/5 | 33.65 |
| 19 | Reany | Foreign | 14 | 5.09% | 0.3286 | 3/5 | 31.90 |

Nineteen entities qualify and 15 are Dutch. Gazelle reaches 100.00, holding both the mention maximum (213 of 275, 77.45%) and the position maximum. Four foreign brands leak through the constraint — Riese & Müller, Cube, Giant and Reany — which is what the models do when the Dutch shelf runs short of options.

The constrained cut is more useful for what it surfaces than for its shares. **Five Dutch entities qualify here that do not qualify in the general cut**: Veloretti, Bakfiets.nl, Dutch ID, Lovens and Santos. These are brands the assistants know but rarely volunteer. Asking for a Dutch brand does not merely reweight the list — it produces a partly different list.

### 4.3 Reading the two together

The honest summary is that the origin clause changes the answer a great deal here, unlike in some other markets this series has measured. Dutch entities hold 40.0% of the origin-neutral top ten and 90.0% of the constrained top ten. Anyone quoting one figure without the other, or without the question count behind it, is describing a question set rather than a market.

05

SECTION 05

# Differences Between Models

All five models put Gazelle first among Core entities, but they disagree by a factor of nearly three about how many entities an answer should contain and by nearly 60 points about whether to search the web at all.

DIFFERENCES BETWEEN MODELS

# Agreement on the leader, disagreement on everything else

ONE-SENTENCE TAKEAWAY

**All five models put Gazelle first among Core entities, but they disagree by a factor of nearly three about how many entities an answer should contain and by nearly 60 points about whether to search the web at all.**

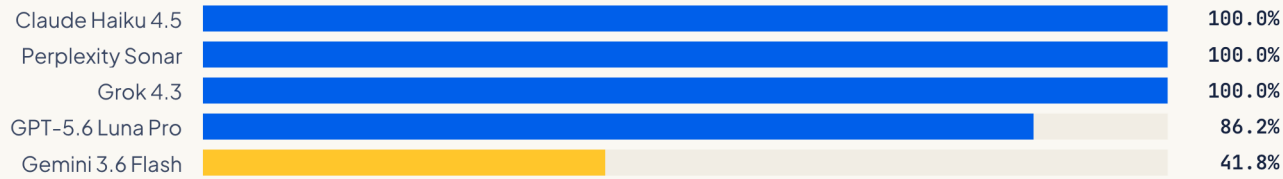
## 5.1 Per-model behavior

Grok names **9.10** Core entities per response and mentions 127 distinct Core entities across its 225 answers. GPT-5.6 names **3.25** and touches 62. Claude Haiku is the narrowest on Core entities at 2.87. These are answer-format differences, not disagreements about the market, and they are the reason breadth carries only a quarter of the composite: an entity that appears in Grok's long lists and nowhere else has a very different visibility profile from one all five models volunteer.

## 5.2 Grounding: one model barely searched

Three models grounded 100% of their answers, GPT-5.6 grounded 86.2%, and **Gemini grounded 41.8%** — meaning roughly 131 of its 225 answers were produced without retrieval. The overall rate of 85.6% is arithmetically correct and individually misleading for one model in five.

CHART 02 · WEB-GROUNDED SHARE OF EACH MODEL'S OWN ANSWERS, %




This matters for interpretation rather than for the scores. Gemini's leaderboard is not obviously stranger than the others: it names Gazelle in 50.7% of its answers, Cube in 32.9% and Batavus in 30.7%, an ordering close to Perplexity's. What differs is where the information comes from. For the ungrounded portion, Gemini is describing what its training data recorded about Dutch bicycle brands, not what the Dutch web says today — and a brand that changed hands, launched or failed recently is exactly the kind of entity that reads differently under those two regimes.

## 5.3 Each model's most-named Core entities

TABLE 09 · TOP FIVE CORE ENTITIES PER MODEL

each model's own denominator

| Model | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| **Claude Haiku 4.5** | Gazelle (24.4%) | Batavus (22.2%) | Cube (20.9%) | Riese & Müller (18.2%) | Trek (15.6%) |
| **Gemini 3.6 Flash** | Gazelle (50.7%) | Cube (32.9%) | Batavus (30.7%) | Koga (25.3%) | Riese & Müller (22.7%) |
| **GPT-5.6 Luna Pro** | Gazelle (51.1%) | Giant (33.6%) | Cube (29.6%) | Koga (22.4%) | Trek (21.5%) |

(cont.)

| Model | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| **Perplexity Sonar** | Gazelle (59.6%) | Batavus (43.6%) | Cube (41.3%) | Sparta (22.7%) | Giant (21.3%) |
| **Grok 4.3** | Gazelle (78.7%) | Batavus (63.1%) | Cube (56.4%) | Sparta (49.3%) | Cortina (33.8%) |

**Gazelle is first in all five models**, but the spread of that first place is enormous: Grok names it in **78.7%** of its answers (177 of 225) and Claude Haiku in **24.4%** (55 of 225). A reader who used only Claude would see a market in which the leader appears in one answer in four; a reader who used only Grok would see one in which it appears in four answers in five. Both are this study's data.

The second and third places diverge more. Batavus is second in Claude, Perplexity and Grok; Cube is second in Gemini; **Giant is second in GPT-5.6** on 75 of its 223 responses (33.6%), a position it holds in no other model. Sparta is fourth in Perplexity and Grok and does not reach the top eight in Claude, Gemini or GPT-5.6.

## 5.4 When a rank is really one model's habit

Ten entity-cut combinations qualify while appearing in only **two of five models**. Their visibility is model-specific and should not be read as market-wide. They are published in the leaderboards with their breadth column intact for exactly this reason.

TABLE 10 · QUALIFIERS RESTING ON TWO OF FIVE MODELS — model-specific visibility

| Entity | Cut | Responses | Mention rate | Breadth |
|---|---|---|---|---|
| **Puch** | Attribute | 23 / 375 | 6.13% | 2/5 |
| **12GO Biking** | Attribute | 22 / 375 | 5.87% | 2/5 |
| **Consumentenbond** | Use case | 21 / 373 | 5.63% | 2/5 |
| **Accell** | Attribute | 20 / 375 | 5.33% | 2/5 |
| **Accell** | Dutch-brand questions | 14 / 275 | 5.09% | 2/5 |
| **Vogue** | Cargo, family & special formats | 14 / 199 | 7.04% | 2/5 |
| **Rose** | Sport & recreational | 13 / 200 | 6.50% | 2/5 |
| **Budget Bike** | Cargo, family & special formats | 11 / 199 | 5.53% | 2/5 |
| **Lapierre** | Sport & recreational | 11 / 200 | 5.50% | 2/5 |
| **Schwalbe** | Sport & recreational | 11 / 200 | 5.50% | 2/5 |

Two cases are worth naming. **Puch** qualifies 21st of 22 in the attribute cut on 23 of 375 responses from two models — a legacy marque the models associate with reliability questions, not a live presence on the Dutch shelf. **Lapierre and Rose** both qualify in the sport segment on two models each, in a cut of only 200 responses where 11 responses is enough to clear the threshold. No entity in the study qualifies anywhere on fewer than 10 responses, and none qualifies with an MRR above 0.9, so the thin cases are thin in breadth rather than in volume.

06

SECTION 06

# Question-Type Ownership

Eleven entities qualify across all three question types, and the entities that qualify in only one reveal what each kind of question is actually asking for.

— QUESTION-TYPE OWNERSHIP

# What each kind of question is really asking for

ONE-SENTENCE TAKEAWAY

**Eleven entities qualify across all three question types, and the entities that qualify in only one reveal what each kind of question is actually asking for.**

The 45 questions divide evenly into three types: 15 discovery ("which brands should I look at"), 15 attribute ("which e-bikes have belt drive / a big range / good service") and 15 use case ("I commute 25 km each way in headwind"). Denominators are 375, 375 and 373.

TABLE 11 · QUESTION-TYPE CUTS

15 questions each

| Type | Questions | Denominator | Qualified Core | Leader | Leader score |
|---|---|---|---|---|---|
| **Discovery** | 15 | 375 | 28 | **Gazelle** | 97.32 |
| Attribute | 15 | 375 | 22 | Gazelle | 100.00 |
| Use case | 15 | 373 | 24 | Gazelle | 89.12 |

Gazelle leads all three. **Eleven entities qualify in all three types**: Gazelle, Cube, Batavus, Trek, Giant, Riese & Müller, Koga, Sparta, Kalkhoff, Specialized and Tenways. That group is the durable core of this market's AI visibility — entities the assistants will name whether asked for a recommendation, a specification or a scenario.

The single-type qualifiers are more informative.

- **Discovery only** — Decathlon, Veloretti, Flyer, and the Decathlon sub-brands Elops and Van Rysel. These are names that surface when someone asks an open "where do I start" question and disappear the moment the question acquires a constraint.
- **Attribute only** — Cowboy, Dutch ID, ENGWE, Fiido, Puch and Stevens. Direct-to-consumer and specification-led brands: they appear when the question is about belt drive, a quiet motor or a removable battery, and not when it is about a commute.
- **Use case only** — ADO, Bakfiets.nl, Brompton, Lovens, Phatfour and Stromer. Every one of these is tied to a specific journey: a folding bike for the train, a cargo bike for two children, a speed pedelec for 35 km each way. Brompton reaches an MRR of 0.7792 in the use-case cut — the highest MRR of any qualifying entity anywhere in the study — on 20 of 373 responses.

## 6.1 Discovery — top 15 of 28 qualifiers

TABLE 12 · DISCOVERY CUT

15 questions · 375 responses

| # | Entity | Origin | Resp. | Mention | MRR | AI Score |
|---|---|---|---|---|---|---|
| 1 | **Gazelle** | NL | 223 | 59.47% | 0.5505 | 97.32 |
| 2 | Cube | Foreign | 178 | 47.47% | 0.4160 | 81.56 |
| 3 | Batavus | NL | 183 | 48.80% | 0.3896 | 81.26 |
| 4 | Trek | Foreign | 110 | 29.33% | 0.3107 | 62.61 |
| 5 | Giant | Foreign | 114 | 30.40% | 0.2735 | 61.58 |

(cont.)

| # | Entity | Origin | Resp. | Mention | MRR | AI Score |
|---|---|---|---|---|---|---|
| 6 | Urban Arrow | NL | 35 | 9.33% | 0.5944 | 61.56 |
| 7 | Cortina | NL | 105 | 28.00% | 0.3030 | 61.22 |
| 8 | Sparta | NL | 111 | 29.60% | 0.2486 | 59.74 |
| 9 | Veloretti | NL | 24 | 6.40% | 0.5924 | 59.24 |
| 10 | Koga | NL | 94 | 25.07% | 0.2670 | 57.22 |
| 11 | VanMoof | NL | 20 | 5.33% | 0.6045 | 54.04 |
| 12 | Decathlon | Foreign | 81 | 21.60% | 0.2554 | 54.02 |
| 13 | Tern | Foreign | 21 | 5.60% | 0.5638 | 52.22 |
| 14 | Riese & Müller | Foreign | 70 | 18.67% | 0.2210 | 50.09 |
| 15 | Canyon | Foreign | 47 | 12.53% | 0.2998 | 49.36 |

## 6.2 Attribute — top 15 of 22 qualifiers

TABLE 13 · ATTRIBUTE CUT 15 questions · 375 responses

| # | Entity | Origin | Resp. | Mention | MRR | AI Score |
|---|---|---|---|---|---|---|
| 1 | **Gazelle** | NL | 216 | 57.60% | 0.5780 | 100.00 |
| 2 | Batavus | NL | 139 | 37.07% | 0.2794 | 68.46 |
| 3 | Tenways | NL | 71 | 18.93% | 0.5110 | 66.31 |
| 4 | Cube | Foreign | 117 | 31.20% | 0.3002 | 64.96 |
| 5 | Riese & Müller | Foreign | 82 | 21.87% | 0.3695 | 61.26 |
| 6 | Kalkhoff | Foreign | 75 | 20.00% | 0.2814 | 55.23 |
| 7 | Koga | NL | 79 | 21.07% | 0.2431 | 54.07 |
| 8 | Sparta | NL | 77 | 20.53% | 0.2130 | 52.10 |
| 9 | Specialized | Foreign | 41 | 10.93% | 0.4118 | 49.91 |
| 10 | Trek | Foreign | 64 | 17.07% | 0.1837 | 47.87 |
| 11 | Cortina | NL | 62 | 16.53% | 0.1864 | 47.59 |
| 12 | Giant | Foreign | 49 | 13.07% | 0.2241 | 46.84 |
| 13 | Cowboy | Foreign | 22 | 5.87% | 0.4203 | 46.40 |
| 14 | Stevens | Foreign | 25 | 6.67% | 0.3837 | 45.13 |
| 15 | VanMoof | NL | 38 | 10.13% | 0.2745 | 42.16 |

## 6.3 Use case — top 15 of 24 qualifiers

TABLE 14 · USE-CASE CUT

15 questions · 373 responses

| # | Entity | Origin | Resp. | Mention | MRR | AI Score |
|---|---|---|---|---|---|---|
| 1 | **Gazelle** | NL | 155 | 41.55% | 0.4965 | 89.12 |
| 2 | Cube | Foreign | 112 | 30.03% | 0.4311 | 74.11 |
| 3 | Urban Arrow | NL | 43 | 11.53% | 0.7663 | 66.99 |
| 4 | Trek | Foreign | 71 | 19.03% | 0.4807 | 64.12 |
| 5 | Giant | Foreign | 76 | 20.38% | 0.3452 | 60.36 |
| 6 | Phatfour | NL | 22 | 5.90% | 0.6758 | 57.41 |
| 7 | Canyon | Foreign | 43 | 11.53% | 0.5170 | 57.39 |
| 8 | Riese & Müller | Foreign | 73 | 19.57% | 0.2544 | 55.99 |
| 9 | Brompton | Foreign | 20 | 5.36% | 0.7792 | 55.81 |
| 10 | Tenways | NL | 25 | 6.70% | 0.5784 | 54.53 |
| 11 | Specialized | Foreign | 65 | 17.43% | 0.2640 | 54.04 |
| 12 | Koga | NL | 46 | 12.33% | 0.3509 | 51.87 |
| 13 | Batavus | NL | 72 | 19.30% | 0.2450 | 50.34 |
| 14 | Stromer | Foreign | 20 | 5.36% | 0.6039 | 49.06 |
| 15 | Cannondale | Foreign | 28 | 7.51% | 0.3560 | 46.83 |

There is also a structural point buried in the attribute cut. Because all 15 attribute questions sit in the everyday segment, the attribute leaderboard and the everyday leaderboard share half their evidence, and the two cuts should not be read as independent confirmations of each other. Gazelle reaching exactly 100.00 in both is one result, not two.

Discovery qualifies the most entities (28 of 375 responses) and attribute the fewest (22). Open questions spread mentions across a wider field; constrained ones concentrate them.

07

SECTION 07

# Segment Leaderboards

All 15 attribute questions fall in one of the three segments, so these leaderboards are indicative only and their entity counts must not be compared with each other.

SEGMENT LEADERBOARDS

# Three formats, three leaders, one unbalanced cut

READ THIS LIMITATION FIRST

**All 15 attribute questions fall in Everyday & commuting, so these leaderboards are indicative only, their entity counts must not be compared with each other, and the everyday segment's larger qualifier field partly reflects its 29 questions and 724 responses rather than a broader market.**

The segments are a cut of the question set, not an attribute of the entities, and the cut is unbalanced by design rather than by accident.

TABLE 15 · SEGMENT DESIGN BALANCE

question types by segment

| Segment | Questions | Responses | Discovery | Attribute | Use case |
|---|---|---|---|---|---|
| Everyday & commuting | 29 | 724 | 9 | 15 | 5 |
| Sport & recreational | 8 | 200 | 3 | 0 | 5 |
| Cargo, family & special formats | 8 | 199 | 3 | 0 | 5 |

All 15 attribute questions sit in **Everyday & commuting**, because attribute questions in this vertical ask about generic e-bike properties — motor, battery, belt drive, brakes, service — rather than about a product format. The other two segments carry eight questions each and zero attribute coverage.

## 7.1 Everyday & commuting (29 questions, 724 responses)

TABLE 16 · EVERYDAY & COMMUTING — INDICATIVE

top 15 of 18 qualifiers

| # | Entity | Origin | Resp. | Mention | MRR | AI Score |
|---|---|---|---|---|---|---|
| 1 | **Gazelle** | NL | 461 | 63.67% | 0.5803 | 100.00 |
| 2 | Batavus | NL | 331 | 45.72% | 0.3453 | 75.16 |
| 3 | Cube | Foreign | 222 | 30.66% | 0.3130 | 62.85 |
| 4 | Tenways | NL | 106 | 14.64% | 0.4678 | 59.53 |
| 5 | Sparta | NL | 206 | 28.45% | 0.2368 | 57.35 |
| 6 | Koga | NL | 184 | 25.41% | 0.2607 | 56.44 |
| 7 | Cortina | NL | 174 | 24.03% | 0.2604 | 55.45 |
| 8 | Riese & Müller | Foreign | 135 | 18.65% | 0.3050 | 53.94 |
| 9 | Veloretti | NL | 41 | 5.66% | 0.4704 | 53.32 |
| 10 | VanMoof | NL | 59 | 8.15% | 0.3844 | 50.64 |
| 11 | Giant | Foreign | 111 | 15.33% | 0.2659 | 49.58 |
| 12 | Kalkhoff | Foreign | 117 | 16.16% | 0.2523 | 49.46 |
| 13 | Trek | Foreign | 105 | 14.50% | 0.1970 | 45.43 |

(cont.)

| # | Entity | Origin | Resp. | Mention | MRR | AI Score |
|---|---|---|---|---|---|---|
| 14 | QWIC | NL | 59 | 8.15% | 0.2585 | 44.12 |
| 15 | Decathlon | Foreign | 40 | 5.52% | 0.2939 | 44.10 |

Gazelle reaches 100.00, holding both maxima on 461 of 724 responses (63.67%). Eleven of the 18 qualifiers are Dutch — the highest domestic share of any segment — and this is the only segment where 12GO Biking, a retailer, qualifies at all (37 of 724, 5.11%, on three models).

## 7.2 Sport & recreational (8 questions, 200 responses)

TABLE 17 · SPORT & RECREATIONAL — INDICATIVE

top 15 of 19 qualifiers

| # | Entity | Origin | Resp. | Mention | MRR | AI Score |
|---|---|---|---|---|---|---|
| 1 | **Cube** | Foreign | 128 | 64.00% | 0.5748 | 97.74 |
| 2 | Trek | Foreign | 117 | 58.50% | 0.4787 | 89.23 |
| 3 | Giant | Foreign | 114 | 57.00% | 0.3233 | 80.68 |
| 4 | Canyon | Foreign | 83 | 41.50% | 0.4249 | 74.68 |
| 5 | Gazelle | NL | 33 | 16.50% | 0.6217 | 66.60 |
| 6 | Specialized | Foreign | 60 | 30.00% | 0.2592 | 58.60 |
| 7 | Cannondale | Foreign | 50 | 25.00% | 0.2784 | 56.01 |
| 8 | Ridley | Foreign | 12 | 6.00% | 0.5444 | 55.49 |
| 9 | Orbea | Foreign | 17 | 8.50% | 0.4674 | 53.53 |
| 10 | Koga | NL | 18 | 9.00% | 0.4784 | 49.41 |
| 11 | Merida | Foreign | 39 | 19.50% | 0.1835 | 47.57 |
| 12 | Decathlon | Foreign | 34 | 17.00% | 0.2030 | 46.75 |
| 13 | Van Rysel | Foreign | 32 | 16.00% | 0.2415 | 42.90 |
| 14 | Scott | Foreign | 28 | 14.00% | 0.2363 | 41.24 |
| 15 | Riese & Müller | Foreign | 11 | 5.50% | 0.2456 | 40.72 |

One of the two cuts Gazelle does not lead. **Cube leads at 97.74** on 128 of 200 responses (64.00%), ahead of Trek (89.23) and Giant (80.68). Only **4 of the 19 qualifiers are Dutch**, against 15 foreign — an inversion of every other cut. Gazelle still places fifth on the position maximum (MRR 0.6217) despite a mention rate of just 16.50%: when road and gravel questions mention it at all, they mention it first, and then move on.

## 7.3 Cargo, family & special formats (8 questions, 199 responses)

TABLE 18 · CARGO, FAMILY & SPECIAL FORMATS — INDICATIVE top 15 of 37 qualifiers

| # | Entity | Origin | Resp. | Mention | MRR | AI Score |
|---|---|---|---|---|---|---|
| 1 | **Urban Arrow** | NL | 72 | 36.18% | 0.7374 | 85.79 |
| 2 | Gazelle | NL | 100 | 50.25% | 0.3656 | 84.08 |
| 3 | Riese & Müller | Foreign | 79 | 39.70% | 0.2591 | 70.53 |
| 4 | Tern | Foreign | 47 | 23.62% | 0.4009 | 61.58 |
| 5 | Phatfour | NL | 22 | 11.06% | 0.6758 | 60.92 |
| 6 | Cube | Foreign | 57 | 28.64% | 0.2525 | 60.37 |
| 7 | Brompton | Foreign | 20 | 10.05% | 0.7792 | 59.00 |
| 8 | Tenways | NL | 30 | 15.08% | 0.4717 | 56.66 |
| 9 | Batavus | NL | 51 | 25.63% | 0.1875 | 55.17 |
| 10 | Carqon | NL | 39 | 19.60% | 0.2406 | 51.81 |
| 11 | Bakfiets.nl | NL | 27 | 13.57% | 0.3278 | 49.77 |
| 12 | Lovens | NL | 43 | 21.61% | 0.2573 | 49.25 |
| 13 | Kalkhoff | Foreign | 26 | 13.07% | 0.2359 | 45.78 |
| 14 | Upway | Foreign | 36 | 18.09% | 0.2487 | 45.77 |
| 15 | EMQ | NL | 15 | 7.54% | 0.4863 | 45.47 |

**Urban Arrow leads at 85.79** on 72 of 199 responses, narrowly ahead of Gazelle (84.08) which is named more often (100 of 199) but later. Twenty-one of the 37 qualifiers are Dutch, and the specialist Dutch cargo names — Carqon, Bakfiets.nl, Lovens, EMQ, Brekr, Dolly, Babboe, BOHLT — appear here and almost nowhere else.

**37 qualifiers on 199 responses is arithmetic, not market structure.** The qualification threshold is a rate, so a 199-response cut needs only 10 responses to clear 5%, against 57 in the general cut. The cargo segment is not twice as diverse as the general market; its threshold is five and a half times easier to reach. Compare mention rates and response counts across segments, never qualifier counts.

08

SECTION 08

# Components and Adjacent Brands

The most-mentioned entity in this entire study is a motor manufacturer, and it is deliberately not on any leaderboard.

COMPONENTS AND ADJACENT BRANDS

# The drivetrain answers the specification question

ONE-SENTENCE TAKEAWAY

**The most-mentioned entity in this entire study is a motor manufacturer, and it is deliberately not on any leaderboard.**

Thirty-two entities are classified *Adjacent*: motors, drivetrains, brakes, tires, batteries and accessories. They are matched, measured and scored on the same published scale as everything else, and they are excluded from every leaderboard, because a shopper choosing between a Gazelle and a Batavus is not choosing between them and a Bosch.

TABLE 19 · ADJACENT ENTITIES, GENERAL CUT

top 12 by responses · not ranked against bicycle brands

| Entity | Origin | Resp. | Mention | MRR | Breadth | c_mention |
|---|---|---|---|---|---|---|
| **Bosch** | Foreign | 626 | 55.74% | 0.4839 | 5/5 | 105.39 |
| Shimano | Foreign | 460 | 40.96% | 0.3591 | 5/5 | 77.44 |
| Gates | Foreign | 204 | 18.17% | 0.3704 | 5/5 | 34.34 |
| Enviolo | NL | 188 | 16.74% | 0.2435 | 5/5 | 31.65 |
| Bafang | Foreign | 101 | 8.99% | 0.3036 | 5/5 | 17.00 |
| Yamaha | Foreign | 56 | 4.99% | 0.2045 | 4/5 | 9.43 |
| Pinion | Foreign | 34 | 3.03% | 0.4424 | 5/5 | 5.72 |
| Fazua | Foreign | 29 | 2.58% | 0.2477 | 5/5 | 4.88 |
| Rohloff | Foreign | 28 | 2.49% | 0.1851 | 5/5 | 4.71 |
| Magura | Foreign | 28 | 2.49% | 0.2764 | 4/5 | 4.71 |
| SRAM | Foreign | 27 | 2.40% | 0.2517 | 5/5 | 4.55 |
| Maxi-Cosi | NL | 22 | 1.96% | 0.3006 | 5/5 | 3.70 |

**Bosch appears in 626 of 1,123 responses (55.74%) — more than Gazelle's 594.** Shimano appears in 460 of 1,123 (40.96%). Gates, the belt-drive manufacturer, appears in 204 (18.17%), which on responses alone would place it ninth among the nineteen qualified Core entities. Enviolo, the Dutch hub-gear maker, appears in 188 of 1,123 (16.74%). Five Adjacent entities clear the 5% threshold.

Because the scale is drawn from qualified Core entities, Bosch's c_mention is **105.39** — above the ceiling by construction, reported and never clipped. Reading this correctly matters: it does not mean Bosch is better than the best bicycle brand at anything. It means Bosch is named in 626 of 1,123 responses against the 594 of 1,123 that define 100 on that axis, and that a scale built on bicycle brands cannot contain it.

**What this says about how assistants answer Dutch e-bike questions.** In this market the models answer specification questions through the drivetrain. Asked which e-bike has a large real-world range, or which needs the least maintenance, the assistants reach first for the motor and transmission and only then for the bicycle around them — Bosch is named in 131 of Gemini's 225 answers and 169 of Grok's. The consequence for brands is structural rather than competitive: a substantial share of the specification-level authority in AI answers about Dutch e-bikes accrues to two or three component suppliers that no consumer buys directly.

ONE RECLASSIFICATION

Maxi-Cosi was moved from Out-of-scope to Adjacent. It makes no bicycle product, but it is named as a child-seat fitting on cargo bikes, which is the same relationship a motor has to the vertical. It appears in 22 responses.

09

SECTION 09

# The Source Ecosystem

Retailers and consumer-testing publications, not brands, supply most of what AI assistants cite about Dutch bicycles — brand-owned sites account for 15.6% of citations, the lowest share this series has recorded.

THE SOURCE ECOSYSTEM

# The information layer is not brand-owned

ONE-SENTENCE TAKEAWAY

**Retailers and consumer-testing publications, not brands, supply most of what AI assistants cite about Dutch bicycles — brand-owned sites account for 15.6% of citations, the lowest share this series has recorded.**

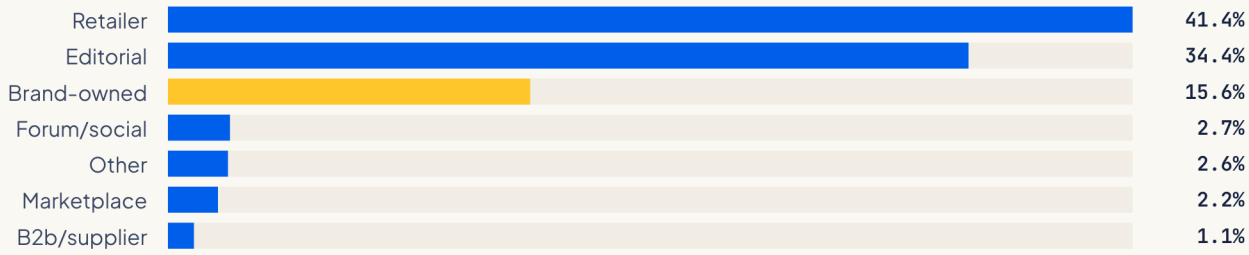
**750 distinct domains** were cited across the 1,123 analyzed responses. **479 reached the floor of ≥3 responses**, carrying **95.6% of all citation volume**, and 100% of those were classified. The classified set carries 7,561 cited responses in total.

TABLE 20 · SOURCE-TYPE MIX

479 classified domains · 7,561 cited responses

| Source type | Domains | Cited responses | Share of citations | Share of domains |
|---|---|---|---|---|
| **retailer** | 150 | 3,132 | 41.4% | 31.3% |
| editorial | 180 | 2,599 | 34.4% | 37.6% |
| brand-owned | 89 | 1,178 | 15.6% | 18.6% |
| forum/social | 12 | 203 | 2.7% | 2.5% |
| other | 23 | 195 | 2.6% | 4.8% |
| marketplace | 13 | 168 | 2.2% | 2.7% |
| b2b/supplier | 12 | 86 | 1.1% | 2.5% |

CHART 03 · SHARE OF CITATIONS BY SOURCE TYPE, %




**Retailers supply 41.4% of citations from 150 domains, and editorial 34.4% from 180.** Brand-owned sites account for **15.6%** — the lowest brand-owned share this series has measured in any market. Marketplaces contribute 2.2% from 13 domains, consistent with their near-total absence from the leaderboards. The *other* bucket sits at 2.6%, well inside the 25% ceiling that would have triggered a reclassification pass.

TABLE 21 · THE 12 MOST-CITED DOMAINS

responses citing · of 1,123

| # | Domain | Responses citing | Source type | Dictionary entity |
|---|---|---|---|---|
| 1 | **12gobiking.nl** | 373 | retailer | **12GO Biking** |
| 2 | anwb.nl | 321 | editorial | ANWB |
| 3 | consumentenbond.nl | 221 | editorial | Consumentenbond |
| 4 | upway.nl | 198 | retailer | Upway |

(cont.)

| # | Domain | Responses citing | Source type | Dictionary entity |
|---|---|---|---|---|
| 5 | hetzwartefietsenplan.com | 160 | retailer | Het Zwarte Fietsenplan |
| 6 | qicq.nl | 151 | retailer | QicQ |
| 7 | fietsvoordeelshop.nl | 150 | retailer | Fietsvoordeelshop |
| 8 | broekhuis.nl | 122 | retailer | Broekhuis |
| 9 | fietsenwinkel.nl | 116 | retailer | Fietsenwinkel.nl |
| 10 | nl.upway.be | 112 | retailer | Upway |
| 11 | biketotaal.nl | 112 | retailer | Bike Totaal |
| 12 | leendersfietsen.nl | 99 | retailer | Leenders Fietsen |

The most-cited single domain is **12gobiking.nl at 373 responses** — cited in one answer in three, by a retailer that appears by name in only 46. Its own dictionary entity does not clear the general threshold. A shop can be the web's answer to a question without being the assistant's answer to it.

The next two are consumer organizations: **anwb.nl at 321** and **consumentenbond.nl at 221**. Together with productscore.nl (92) and elektrischefietser.nl (61), the testing-and-comparison layer of the Dutch web is doing a large share of the assistants' work for them.

**121 of the 479 classified domains resolve to an entity in this study's dictionary**, carrying 4,056 of the 7,561 cited responses. Of the 89 brand-owned domains, 22 belong to entities that qualify in the general leaderboard, led by gazelle.nl (97), giant-bicycles.com (54), batavus.com (51) and koga.com (50). Every one of those numbers is an order of magnitude below the retailer and testing domains above them.

What this chapter cannot show is influence. A citation is a link the model attached to an answer, not a demonstration that the link shaped the answer, and 41.8% grounding on one model means a substantial share of this study's text was produced with no citations at all. The source mix describes the documented half of the channel. It is the best available proxy for where AI assistants learn about Dutch bicycles and it is not the same thing.

TWO CAVEATS

42 of the 479 domains carry a Low classification confidence, and the largest unattributed source is productscore.nl, the 14th most-cited domain in the study at 92 responses, whose operator could not be identified — it is classified editorial on the basis of what it publishes rather than who runs it. Source classification is derived from the entity dictionary wherever an entity owns the domain, so a business that is both a cited source and a named entity is never counted twice.

10

SECTION 10

# What the Patterns Suggest

Four readings are available from this data, and each has something in it that cuts the other way.

WHAT THE PATTERNS SUGGEST

# Four readings, each with a counterweight

ONE-SENTENCE TAKEAWAY

**Four readings are available from this data, and each has something in it that cuts the other way.**

1. **A concentrated top and a flat middle.** Gazelle's 21-point lead is the largest gap on the board, and below third place thirteen entities sit inside eighteen points. Reading: AI visibility in this market is winner-heavy at the summit and unstructured beneath it. Against it: the flat middle is partly a scaling artefact — composite scores compress once c_breadth saturates at 100 for every entity named by all five models, which is 17 of 19 here.

2. **Origin matters more than the domestic share suggests.** Dutch brands take 40.0% of the origin-neutral top ten, which is a strong showing for a market of this size against German, American and Taiwanese competition. Against it: Cube outmentions Gazelle on origin-neutral questions by one response in 848, and six Dutch entities qualify only when the question asks for a Dutch brand. Domestic visibility here is real but conditional, and the condition is the wording of the question.

3. **The specification layer belongs to suppliers.** Bosch and Shimano are named in 55.74% and 40.96% of all responses, and the assistants answer attribute questions through the drivetrain. Reading: component brands hold a share of AI-mediated authority disproportionate to their consumer relationship. Against it: this is partly an artefact of question design — 15 of 45 questions are attribute questions, and they concentrate in one segment.

4. **The information layer is not brand-owned.** Brand sites supply 15.6% of citations while retailers and consumer-testing publications supply 75.8% between them. Reading: what an assistant says about a Dutch bicycle brand is mostly assembled from what other people wrote about it. Against it: citation share is not influence share — this study measures which domains a model cited, not which shaped its answer, and 41.8% of one model's answers cited nothing at all.

5. **Retail is the shelf, and it is specialist.** Two pure retailers qualify in the general cut and marketplaces qualify in one cut out of nine, while retailer domains supply 41.4% of citations from 150 domains. Reading: in this market the assistants route discovery through specialist bicycle sellers rather than through general commerce platforms, which is close to the opposite of what this series has recorded elsewhere. Against it: the question set contains several explicit purchase and second-hand questions, which invites retailer answers, and one of those retailers — 12GO Biking — supplies the single most-cited domain in the study while appearing by name in only 46 of 1,123 responses.

No recommendations follow from any of this. This is a measurement, not a strategy document.

11

SECTION 11

# Limitations and Notes

This is a single, one-market, point-in-time baseline with an unbalanced segment design; the figures should be read within the limitations below.

LIMITATIONS AND NOTES

# What this edition cannot tell you

ONE-SENTENCE TAKEAWAY

**This is a single, one-market, point-in-time baseline with an unbalanced segment design; the figures should be read within the limitations below.**

**Single collection window.** 1,125 responses were collected on 5 September 2026 and 1,123 analyzed. This is a snapshot, not a trend. It is the first Netherlands edition, so no cross-edition comparison exists and none is implied.

**Tenways is a boundary case, and it moves a published figure.** Its EU class-12 marks were filed in 2021 by a Hong Kong company and transferred to a Dutch B.V. in a proprietor change published on 29 September 2025, eleven months before collection. Under the declared trademark rule Tenways is Local and is published that way. Readers who think of it as an Asian brand are describing its founding, not its current EU trademark ownership; its UK and Swiss marks remain with the Hong Kong entity, so the change is jurisdiction-specific. **Sensitivity: the origin-neutral cut has 7 qualified Dutch-origin entities including Tenways and 6 without it.**

**Amslod moved the other way.** Its EU mark passed to a Czech company after the 2025 bankruptcy of the Dutch operating entity, so a brand many Dutch consumers would call Dutch is classified Foreign. It does not qualify in any cut.

**One brand the assistants describe as Dutch is not.** The answers repeatedly presented **Ecobike** as a Dutch brand. It is Polish. The Tilburg business the models were describing is Ecobike Fietsen, its Dutch dealer. The classification follows the trademark, not the answer text, and this is a case where the models are confidently wrong about a fact this report measures.

**Ten qualifiers rest on two of five models.** Listed in full in §5.4. Their visibility is model-specific. Every one is published with its breadth column intact rather than being quietly dropped, and none rests on fewer than 10 responses.

**Segment design is unbalanced.** All 15 attribute questions fall in Everyday & commuting; the other two segments have zero attribute coverage and eight questions each. Segment leaderboards are indicative and distinct_entities must not be compared across segments. This is the most significant structural limitation in the edition.

**Small cuts qualify more entities.** The 199-response cargo cut qualifies 37 entities against 19 in the 1,123-response general cut, because the threshold is a rate. That is arithmetic.

**Low mention rate with high MRR ranks surprisingly well.** Urban Arrow holds the general-cut position maximum on 80 responses at a mention rate of 7.12%. The composite is working as designed, but the raw numbers should be read alongside the score, which is why both are printed in every table.

**Sub-brands may structurally under-count.** Models frequently name a parent where a manufacturer or a consumer would name a sub-brand. Decathlon's sub-brands are visible here (Elops, Rockrider, Van Rysel) only because a backstop pass restored them after the extraction rules demoted them.

**One extraction gap was structural.** Riese & Müller was never generated as a candidate, because its name contains an ampersand. It entered the dictionary as a promoted merge target and finished 8th. Similar names in future editions carry the same risk, and this is now a known check.

**Four dictionary entities matched nothing.** All are Out-of-scope non-brands; three of them are publications whose domains are cited but whose names are never written in the answers.

**Nine entities have Unknown trademark origin.** They are excluded from origin shares rather than counted as Foreign, and none of them qualifies in any cut, so no published share is affected.

**Two identical response sets were inspected and left separate.** Csepel and FabricBike each appear in the same 3 responses, and are unrelated brands.

**Citation volume and naming are different measurements.** 12gobiking.nl is cited in 373 of 1,123 responses while 12GO Biking is named in 46. A domain can carry an answer without the organization behind it being named in that answer, and this report measures the second thing, not the first.

**The question set is fixed and partial.** 45 questions cannot cover a market. They were written to span discovery, specification and scenario, and three product formats, but they are not a sample of Dutch search demand and no weighting was applied to make them one. A brand strong in a format the question set touches lightly will be under-represented here.

NEVER COMPARE SCALED SCORES ACROSS CUTS OR EDITIONS

A score of 100 in one cut is a different absolute level of visibility from 100 in another, because the scale moves when the leader moves. Cross-edition comparison must use mention_rate, mrr and breadth.

FREQUENTLY ASKED QUESTIONS

# Frequently asked questions

### Does a high AI Visibility Score mean a better bicycle?

No. The score measures whether an AI assistant names an entity and how early, nothing else. It does not measure build quality, durability, price, service or whether the recommendation was accurate. A brand can be highly visible and mediocre, or excellent and invisible.

### Why is Bosch not at the top of the leaderboard when it is named most often?

Bosch is a motor manufacturer, classified Adjacent. It appears in 626 of 1,123 responses, more than any bicycle brand, and is reported separately in Chapter 8. Ranking it against bicycle brands would mean scoring every Dutch bicycle manufacturer against a German component supplier, which answers a question nobody asked.

### Can I compare a score in this report with a score in another edition or market?

No. Each component is scaled against the maximum held by a qualified Core entity in the same cut, so the scale moves whenever the leader moves. Compare mention rate, MRR, breadth and raw response counts instead. This is edition 1, so there is no prior Netherlands edition to compare against in any case.

### Are Dutch brands more visible than foreign ones?

On the 34 origin-neutral questions (848 responses), 7 of 20 qualifiers are Dutch and Dutch brands take 40.0% of the top ten. On the 11 questions that explicitly ask for a Dutch brand (275 responses), 15 of 19 qualifiers are Dutch — but that is what those questions were built to return, so it cannot be used as evidence of visibility.

### Why are retailers and marketplaces in the rankings?

Because the assistants name them. When someone asks where to buy a refurbished e-bike, the answer is a shop. Removing them would describe a shelf that no user is actually shown. Companion tables with the five named marketplaces removed are published, and in this edition they are identical to the main boards in eight of nine cuts.

### Why does Urban Arrow rank fourth when it is only named in 7% of responses?

Because position carries 30% of the composite and Urban Arrow holds the general-cut position maximum: when it is named, it is named first. §3.2 republishes the same cut ordered by mention rate alone, where it falls to fifteenth. Both orderings are published because they answer different questions.

### One model only searched the web 41.8% of the time. Does that invalidate the results?

No, but it changes what one fifth of the study means. Gemini grounded 41.8% of its answers against 100% for three other models. For its ungrounded answers it is describing what its training data recorded rather than what the Dutch web says now. Its leaderboard is not markedly different from the others, but recent changes in the market are exactly what an ungrounded answer would miss.

12

SECTION 12

# Appendix & Data

The study's 45 Dutch questions, every tracked entity, data availability, and about Herm.io.

APPENDIX & DATA

# 12.1 All 45 questions, as asked

Questions are reproduced in Dutch exactly as they were sent, including colloquial phrasing and imperfect grammar. English glosses are editorial and were not used in collection. Scope: 11 Dutch-brand, 34 origin-neutral. Type: 15 discovery, 15 attribute, 15 use case.

| # | Question (Dutch, as asked) · English gloss | Type | Scope | Segment |
|---|---|---|---|---|
| 1 | **Ik ben niet echt thuis in elektrische fietsen en er zijn zoveel merken. Waar zou je beginnen als ik vooral iets degelijks wil?**<br>*I'm not really up to speed on electric bikes and there are so many brands. Where would you start if I mainly want something solid?* | discovery | Origin-neutral | Everyday & commuting |
| 2 | **wat zijn op dit moment goede e-bikes qua prijs-kwaliteit?**<br>*what are currently good e-bikes in terms of value for money?* | discovery | Origin-neutral | Everyday & commuting |
| 3 | **goede maar betaalbare elektrische fiets die wel een paar jaar mee kan**<br>*good but affordable electric bike that will last a few years* | discovery | Origin-neutral | Everyday & commuting |
| 4 | **Welke fietsmerken hebben een goede reputatie als je vooral betrouwbaarheid en service belangrijk vindt?**<br>*Which bicycle brands have a good reputation if reliability and service matter most to you?* | discovery | Origin-neutral | Everyday & commuting |
| 5 | **ik zoek een degelijk Nederlands fietsmerk, welke zijn het bekijken waard?**<br>*I'm looking for a solid Dutch bicycle brand, which ones are worth a look?* | discovery | Dutch-brand | Everyday & commuting |
| 6 | **Wat is een goed Nederlands e-bikemerk als prijs-kwaliteit belangrijker is dan luxe?**<br>*What is a good Dutch e-bike brand if value for money matters more than luxury?* | discovery | Dutch-brand | Everyday & commuting |
| 7 | **Ik wil een stadsfiets kopen voor dagelijks gebruik. Welke merken of modellen zou je als eerste bekijken?**<br>*I want to buy a city bike for daily use. Which brands or models would you look at first?* | discovery | Origin-neutral | Everyday & commuting |
| 8 | **eerste gravelbike, budget rond 1500 euro – wat zijn goede opties?**<br>*first gravel bike, budget around 1500 euros - what are good options?* | discovery | Origin-neutral | Sport & recreational |
| 9 | **Ik wil beginnen met racefietsen en heb ongeveer €1500 te besteden. Welke fietsen zijn interessant?**<br>*I want to start road cycling and have about €1500 to spend. Which bikes are interesting?* | discovery | Origin-neutral | Sport & recreational |
| 10 | **eerste mountainbike, vooral Nederlandse trails en bos, welke modellen zijn een goede instap?**<br>*first mountain bike, mainly Dutch trails and woodland, which models are a good entry point?* | discovery | Origin-neutral | Sport & recreational |
| 11 | **Wat zijn betrouwbare elektrische bakfietsen voor een gezin?**<br>*What are reliable electric cargo bikes for a family?* | discovery | Origin-neutral | Cargo & family |
| 12 | **longtail fiets als alternatief voor een bakfiets, welke zijn goed?**<br>*longtail bike as an alternative to a cargo bike, which ones are good?* | discovery | Origin-neutral | Cargo & family |

(cont.)

| # | Question (Dutch, as asked) · English gloss | Type | Scope | Segment |
|---|---|---|---|---|
| 13 | **Welke refurbished of tweedehands e-bikes zijn het overwegen waard als ik wel garantie en een goede accu wil?**<br>*Which refurbished or second-hand e-bikes are worth considering if I do want a warranty and a good battery?* | discovery | Origin-neutral | Cargo & family |
| 14 | **Zijn er goede Nederlandse alternatieven als ik een moderne urban e-bike zoek?**<br>*Are there good Dutch alternatives if I'm looking for a modern urban e-bike?* | discovery | Dutch-brand | Everyday & commuting |
| 15 | **liefst van een Nederlands merk: welke comfortabele e-bikes zou je bekijken?**<br>*preferably from a Dutch brand: which comfortable e-bikes would you look at?* | discovery | Dutch-brand | Everyday & commuting |
| 16 | **e-bike onder 2500 euro met middenmotor, welke zijn goed?**<br>*e-bike under 2500 euros with a mid-drive motor, which ones are good?* | attribute | Origin-neutral | Everyday & commuting |
| 17 | **Welke e-bikes hebben in de praktijk een grote actieradius, ook als je veel ondersteuning gebruikt?**<br>*Which e-bikes have a large real-world range, even if you use a lot of assistance?* | attribute | Origin-neutral | Everyday & commuting |
| 18 | **Ik wil zo weinig mogelijk onderhoud: welke e-bikes met riemaandrijving zijn de meerprijs waard?**<br>*I want as little maintenance as possible: which belt-drive e-bikes are worth the extra cost?* | attribute | Origin-neutral | Everyday & commuting |
| 19 | **Welke e-bikes staan bekend om weinig mankementen én onderdelen die later nog gewoon te krijgen zijn?**<br>*Which e-bikes are known for few faults and for parts that are still obtainable later on?* | attribute | Origin-neutral | Everyday & commuting |
| 20 | **goede elektrische damesfiets met lage instap die niet zo zwaar is**<br>*good electric step-through women's bike with a low entry that isn't so heavy* | attribute | Origin-neutral | Everyday & commuting |
| 21 | **Is er een goede Nederlandse e-bike met een stille motor en natuurlijke ondersteuning?**<br>*Is there a good Dutch e-bike with a quiet motor and natural assistance?* | attribute | Dutch-brand | Everyday & commuting |
| 22 | **Welke e-bikes hebben een makkelijk uitneembare accu zonder dat de fiets onhandig zwaar wordt?**<br>*Which e-bikes have an easily removable battery without the bike becoming awkwardly heavy?* | attribute | Origin-neutral | Everyday & commuting |
| 23 | **Ik twijfel tussen een achterwielmotor en middenmotor. Welke e-bikes zijn goede opties als ik vooral soepel en comfortabel wil fietsen?**<br>*I'm torn between a rear-hub motor and a mid-drive. Which e-bikes are good options if I mainly want smooth, comfortable riding?* | attribute | Origin-neutral | Everyday & commuting |
| 24 | **Ik zoek een e-bike met goede remmen en stabiel rijgedrag. Welke modellen springen eruit?**<br>*I'm looking for an e-bike with good brakes and stable handling. Which models stand out?* | attribute | Origin-neutral | Everyday & commuting |

(cont.)

| # | Question (Dutch, as asked) · English gloss | Type | Scope | Segment |
|---|---|---|---|---|
| 25 | **welke e-bike heeft goede service, onderdelen die leverbaar blijven en een dealer waar je terechtkunt?**<br>*which e-bike has good service, parts that stay available and a dealer you can actually go to?* | attribute | Origin-neutral | Everyday & commuting |
| 26 | **Welk Nederlands e-bikemerk staat goed bekend om service en reparaties als er iets misgaat?**<br>*Which Dutch e-bike brand has a good reputation for service and repairs when something goes wrong?* | attribute | Dutch-brand | Everyday & commuting |
| 27 | **lichte e-bike die je nog redelijk in de auto of op een fietsendrager krijgt, wat zijn goede opties?**<br>*light e-bike that you can still reasonably get into a car or onto a bike rack, what are good options?* | attribute | Origin-neutral | Everyday & commuting |
| 28 | **Welke e-bikes werken gewoon goed zonder verplichte app of gedoe met software?**<br>*Which e-bikes just work properly without a compulsory app or software hassle?* | attribute | Origin-neutral | Everyday & commuting |
| 29 | **is er een Nederlands merk met een goede e-bike met riemaandrijving, liefst rond de €3000?**<br>*is there a Dutch brand with a good belt-drive e-bike, preferably around €3000?* | attribute | Dutch-brand | Everyday & commuting |
| 30 | **Ik zoek een Nederlandse e-bike die vooral betrouwbaar is en waarvan accu en onderdelen later nog verkrijgbaar zijn. Wat zou je kiezen?**<br>*I'm looking for a Dutch e-bike that is above all reliable and whose battery and parts will still be available later. What would you choose?* | attribute | Dutch-brand | Everyday & commuting |
| 31 | **Ik fiets 25 km heen en 25 km terug naar mijn werk, ook met tegenwind en kou. Welke e-bikes zou je hiervoor vertrouwen?**<br>*I cycle 25 km there and 25 km back to work, including headwind and cold. Which e-bikes would you trust for this?* | use case | Origin-neutral | Everyday & commuting |
| 32 | **Ik fiets zo'n 15 km enkele reis naar mijn werk en wil gewoon in normale kleding aankomen. Liefst een e-bike van een Nederlands merk; welke zou je bekijken?**<br>*I cycle about 15 km each way to work and just want to arrive in normal clothes. Preferably an e-bike from a Dutch brand; which would you look at?* | use case | Dutch-brand | Everyday & commuting |
| 33 | **Mijn fiets staat vaak buiten in de stad. Welke e-bikes zijn handig als diefstal en een uitneembare accu voor mij belangrijk zijn?**<br>*My bike is often parked outside in the city. Which e-bikes are practical if theft and a removable battery matter to me?* | use case | Origin-neutral | Everyday & commuting |
| 34 | **Ik wil twee kinderen en boodschappen meenemen zonder auto. Welke elektrische bakfietsen of longtails zijn hier fijn voor?**<br>*I want to carry two children and the shopping without a car. Which electric cargo bikes or longtails are good for this?* | use case | Origin-neutral | Cargo & family |
| 35 | **Ik wil korte autoritjes vervangen door fietsen maar nog wel zelf wat moeten doen. Welke e-bikes geven ondersteuning zonder dat het meteen lui voelt?**<br>*I want to replace short car trips with cycling but still do some of the work myself. Which e-bikes give assistance without it immediately feeling lazy?* | use case | Origin-neutral | Everyday & commuting |

(cont.)

| # | Question (Dutch, as asked) · English gloss | Type | Scope | Segment |
|---|---|---|---|---|
| 36 | **Welke e-bike is fijn voor weekendritten van 70 tot 100 km, met genoeg bereik én comfort?**<br>*Which e-bike is good for weekend rides of 70 to 100 km, with enough range and comfort?* | use case | Origin-neutral | Sport & recreational |
| 37 | **elektrische vouwfiets voor trein, auto of camper die niet loodzwaar is – welke zijn goed?**<br>*electric folding bike for the train, car or camper that isn't dead heavy - which ones are good?* | use case | Origin-neutral | Cargo & family |
| 38 | **Ik rij ongeveer 75% op de weg en 25% over bos- en gravelpaden. Welke gravelbikes passen daar goed bij?**<br>*I ride roughly 75% on the road and 25% on woodland and gravel paths. Which gravel bikes suit that well?* | use case | Origin-neutral | Sport & recreational |
| 39 | **Voor Nederlandse MTB-routes wil ik vooral controle en comfort, niet per se snelheid. Welke hardtails of fully's zou je bekijken?**<br>*For Dutch MTB routes I mainly want control and comfort, not necessarily speed. Which hardtails or full-suspension bikes would you look at?* | use case | Origin-neutral | Sport & recreational |
| 40 | **eerste racefiets voor langere ritten, comfortabel genoeg en niet mega agressief – wat zijn goede keuzes?**<br>*first road bike for longer rides, comfortable enough and not super aggressive - what are good choices?* | use case | Origin-neutral | Sport & recreational |
| 41 | **Ik zoek een tweedehands e-bike voor dagelijks woon-werkverkeer. Welke modellen zijn interessant als accuconditie, onderhoud en garantie belangrijk zijn?**<br>*I'm looking for a second-hand e-bike for daily commuting. Which models are interesting if battery condition, servicing and warranty matter?* | use case | Origin-neutral | Cargo & family |
| 42 | **Ik zoek een fatbike voor dagelijks woon-werk, maar wel gewoon legaal en degelijk. Welke modellen zou je bekijken?**<br>*I'm looking for a fatbike for daily commuting, but properly legal and solid. Which models would you look at?* | use case | Origin-neutral | Cargo & family |
| 43 | **Voor 35 km enkele reis naar mijn werk: welke speed pedelecs zijn betrouwbaar genoeg voor dagelijks gebruik?**<br>*For a 35 km each-way commute: which speed pedelecs are reliable enough for daily use?* | use case | Origin-neutral | Everyday & commuting |
| 44 | **Ik zoek een Nederlandse e-bike voor lange toertochten, liefst comfortabel en met een flinke actieradius. Welke opties zijn goed?**<br>*I'm looking for a Dutch e-bike for long touring rides, preferably comfortable and with a decent range. Which options are good?* | use case | Dutch-brand | Sport & recreational |
| 45 | **Zijn er goede Nederlandse merken voor een elektrische bakfiets of longtail waarmee ik twee kinderen en boodschappen kan meenemen?**<br>*Are there good Dutch brands for an electric cargo bike or longtail that can carry two children and the shopping?* | use case | Dutch-brand | Cargo & family |

# 12.2 All tracked entities (222)

The full dictionary, ordered by response count within the general cut (1,123 responses). Entities named in at least 5% of responses are marked **Qualified**. Adjacent entities are matched and scored but excluded from every leaderboard; Out-of-scope entities are excluded from leaderboards and from origin shares. The four entities that matched no response are listed at the end. Brand pages are not linked in this edition.

| Entity | Origin | Type | Scope | Resp. | Rate | Models | Status |
|---|---|---|---|---|---|---|---|
| Bosch | Foreign | Brand | Adjacent | 626 | 55.74% | 5 | Qualified |
| Gazelle | NL | Brand | Core | 594 | 52.89% | 5 | Qualified |
| Shimano | Foreign | Brand | Adjacent | 460 | 40.96% | 5 | Qualified |
| Cube | Foreign | Brand | Core | 407 | 36.24% | 5 | Qualified |
| Batavus | NL | Brand | Core | 394 | 35.08% | 5 | Qualified |
| Trek | Foreign | Brand | Core | 245 | 21.82% | 5 | Qualified |
| Giant | Foreign | Brand | Core | 239 | 21.28% | 5 | Qualified |
| Riese & Müller | Foreign | Brand | Core | 225 | 20.04% | 5 | Qualified |
| Sparta | NL | Brand | Core | 224 | 19.95% | 5 | Qualified |
| Koga | NL | Brand | Core | 219 | 19.50% | 5 | Qualified |
| ANWB | NL | Non-brand | Out of scope | 217 | 19.32% | 5 | Qualified |
| Gates | Foreign | Brand | Adjacent | 204 | 18.17% | 5 | Qualified |
| Enviolo | NL | Brand | Adjacent | 188 | 16.74% | 5 | Qualified |
| Cortina | NL | Brand | Core | 183 | 16.30% | 5 | Qualified |
| Kalkhoff | Foreign | Brand | Core | 151 | 13.45% | 5 | Qualified |
| Specialized | Foreign | Brand | Core | 136 | 12.11% | 5 | Qualified |
| Tenways | NL | Brand + retailer | Core | 136 | 12.11% | 5 | Qualified |
| Consumentenbond | NL | Non-brand | Out of scope | 133 | 11.84% | 5 | Qualified |
| Bafang | Foreign | Brand | Adjacent | 101 | 8.99% | 5 | Qualified |
| Decathlon | Foreign | Retailer | Core | 100 | 8.90% | 5 | Qualified |
| Canyon | Foreign | Brand + retailer | Core | 94 | 8.37% | 5 | Qualified |
| Urban Arrow | NL | Brand | Core | 80 | 7.12% | 5 | Qualified |
| Stella | NL | Brand + retailer | Core | 78 | 6.95% | 4 | Qualified |
| Upway | Foreign | Retailer | Core | 73 | 6.50% | 4 | Qualified |
| VanMoof | NL | Brand | Core | 62 | 5.52% | 5 | Qualified |
| QWIC | NL | Brand | Core | 62 | 5.52% | 5 | Qualified |
| Yamaha | Foreign | Brand | Adjacent | 56 | 4.99% | 4 | Tracked |
| Merida | Foreign | Brand | Core | 55 | 4.90% | 5 | Tracked |
| Cannondale | Foreign | Brand | Core | 55 | 4.90% | 5 | Tracked |
| Tern | Foreign | Brand | Core | 48 | 4.27% | 5 | Tracked |

(cont.)

| Entity | Origin | Type | Scope | Resp. | Rate | Models | Status |
|---|---|---|---|---|---|---|---|
| 12GO Biking | NL | Retailer | Core | 46 | 4.10% | 3 | Tracked |
| Fiido | Foreign | Brand | Core | 44 | 3.92% | 5 | Tracked |
| Lovens | NL | Brand | Core | 43 | 3.83% | 4 | Tracked |
| Veloretti | NL | Brand + retailer | Core | 41 | 3.65% | 5 | Tracked |
| Carqon | NL | Brand | Core | 39 | 3.47% | 5 | Tracked |
| Flyer | Foreign | Brand | Core | 36 | 3.21% | 5 | Tracked |
| Victoria | Foreign | Brand | Core | 35 | 3.12% | 4 | Tracked |
| Cowboy | Foreign | Brand + retailer | Core | 35 | 3.12% | 4 | Tracked |
| Stevens | Foreign | Brand | Core | 35 | 3.12% | 5 | Tracked |
| Brompton | Foreign | Brand | Core | 34 | 3.03% | 4 | Tracked |
| Pinion | Foreign | Brand | Adjacent | 34 | 3.03% | 5 | Tracked |
| Stromer | Foreign | Brand | Core | 34 | 3.03% | 5 | Tracked |
| Dutch ID | NL | Brand | Core | 34 | 3.03% | 4 | Tracked |
| ADO | Foreign | Brand | Core | 33 | 2.94% | 5 | Tracked |
| Algemeen Dagblad | NL | Non-brand | Out of scope | 32 | 2.85% | 4 | Tracked |
| Van Rysel | Foreign | Sub-brand | Core | 32 | 2.85% | 4 | Tracked |
| ENGWE | Foreign | Brand | Core | 32 | 2.85% | 3 | Tracked |
| Fazua | Foreign | Brand | Adjacent | 29 | 2.58% | 5 | Tracked |
| Rohloff | Foreign | Brand | Adjacent | 28 | 2.49% | 5 | Tracked |
| Magura | Foreign | Brand | Adjacent | 28 | 2.49% | 4 | Tracked |
| Bakfiets.nl | NL | Brand | Core | 28 | 2.49% | 5 | Tracked |
| Puch | Foreign | Brand | Core | 28 | 2.49% | 2 | Tracked |
| Scott | Foreign | Brand | Core | 28 | 2.49% | 4 | Tracked |
| SRAM | Foreign | Brand | Adjacent | 27 | 2.40% | 5 | Tracked |
| Accell | NL | Non-brand | Out of scope | 26 | 2.32% | 2 | Tracked |
| Orbea | Foreign | Brand | Core | 25 | 2.23% | 5 | Tracked |
| Reany | Foreign | Brand | Core | 25 | 2.23% | 4 | Tracked |
| Elops | Foreign | Sub-brand | Core | 24 | 2.14% | 5 | Tracked |
| Vogue | NL | Brand | Core | 23 | 2.05% | 4 | Tracked |

(cont.)

| Entity | Origin | Type | Scope | Resp. | Rate | Models | Status |
|---|---|---|---|---|---|---|---|
| Sensa | NL | Brand | Core | 22 | 1.96% | 4 | Tracked |
| Maxi-Cosi | NL | Brand | Adjacent | 22 | 1.96% | 5 | Tracked |
| Schwalbe | Foreign | Brand | Adjacent | 22 | 1.96% | 5 | Tracked |
| Phatfour | NL | Brand + retailer | Core | 22 | 1.96% | 5 | Tracked |
| Fietsvoordeelshop | NL | Retailer | Core | 21 | 1.87% | 3 | Tracked |
| STOER | NL | Brand | Core | 20 | 1.78% | 4 | Tracked |
| EMQ | NL | Brand | Core | 20 | 1.78% | 4 | Tracked |
| Rebike | Foreign | Retailer | Core | 19 | 1.69% | 4 | Tracked |
| Marktplaats | NL | Marketplace | Core | 19 | 1.69% | 4 | Tracked |
| Fietsersbond | NL | Non-brand | Out of scope | 18 | 1.60% | 3 | Tracked |
| Dolly | NL | Brand | Core | 18 | 1.60% | 3 | Tracked |
| Stichting ART | Unknown | Non-brand | Out of scope | 18 | 1.60% | 4 | Tracked |
| Santos | NL | Brand | Core | 18 | 1.60% | 5 | Tracked |
| RIH | NL | Brand | Core | 18 | 1.60% | 4 | Tracked |
| eBikeXL | NL | Retailer | Core | 18 | 1.60% | 4 | Tracked |
| Leenders Fietsen | NL | Retailer | Core | 17 | 1.51% | 2 | Tracked |
| CRIVIT | Foreign | Sub-brand | Core | 16 | 1.42% | 4 | Tracked |
| Rockrider | Foreign | Sub-brand | Core | 16 | 1.42% | 3 | Tracked |
| Tektro | Foreign | Brand | Adjacent | 15 | 1.34% | 5 | Tracked |
| Fietsenwinkel.nl | NL | Retailer | Core | 15 | 1.34% | 3 | Tracked |
| Mivice | Foreign | Brand | Adjacent | 14 | 1.25% | 4 | Tracked |
| Babboe | NL | Brand | Core | 14 | 1.25% | 3 | Tracked |
| Rose | Foreign | Brand + retailer | Core | 14 | 1.25% | 2 | Tracked |
| MOEVS | NL | Brand + retailer | Core | 14 | 1.25% | 3 | Tracked |
| Amslod | Foreign | Brand + retailer | Core | 13 | 1.16% | 3 | Tracked |
| Brose | Foreign | Brand | Adjacent | 13 | 1.16% | 4 | Tracked |
| Klever | Foreign | Brand | Core | 13 | 1.16% | 4 | Tracked |
| Thule | Foreign | Brand | Adjacent | 13 | 1.16% | 4 | Tracked |
| Pegasus | Foreign | Sub-brand | Core | 13 | 1.16% | 5 | Tracked |

(cont.)

| Entity | Origin | Type | Scope | Resp. | Rate | Models | Status |
|---|---|---|---|---|---|---|---|
| Union | NL | Brand | Core | 13 | 1.16% | 2 | Tracked |
| Bike Totaal | NL | Retailer | Core | 13 | 1.16% | 1 | Tracked |
| Gocycle | Foreign | Brand | Core | 12 | 1.07% | 4 | Tracked |
| Ridley | Foreign | Brand | Core | 12 | 1.07% | 5 | Tracked |
| Lemmo | Foreign | Brand + retailer | Core | 12 | 1.07% | 2 | Tracked |
| Urtopia | Foreign | Brand | Core | 12 | 1.07% | 1 | Tracked |
| B'TWIN | Foreign | Sub-brand | Core | 12 | 1.07% | 3 | Tracked |
| iMove | NL | Brand | Core | 12 | 1.07% | 3 | Tracked |
| TQ | Foreign | Brand | Adjacent | 12 | 1.07% | 5 | Tracked |
| Lapierre | Foreign | Brand | Core | 11 | 0.98% | 2 | Tracked |
| biXbi | NL | Sub-brand | Core | 11 | 0.98% | 2 | Tracked |
| OUXI | Foreign | Brand | Core | 11 | 0.98% | 4 | Tracked |
| Budget Bike | NL | Retailer | Core | 11 | 0.98% | 2 | Tracked |
| Mokumono | NL | Brand + retailer | Core | 11 | 0.98% | 3 | Tracked |
| Fiets.nl | Foreign | Non-brand | Out of scope | 10 | 0.89% | 2 | Tracked |
| Haibike | Foreign | Brand | Core | 10 | 0.89% | 2 | Tracked |
| Brekr | NL | Brand | Core | 10 | 0.89% | 3 | Tracked |
| Flebi | Foreign | Brand | Core | 10 | 0.89% | 2 | Tracked |
| BOVAG | NL | Non-brand | Out of scope | 10 | 0.89% | 3 | Tracked |
| FOLT | NL | Brand + retailer | Core | 10 | 0.89% | 3 | Tracked |
| Yuba | Foreign | Brand | Core | 10 | 0.89% | 3 | Tracked |
| BOHLT | NL | Brand | Core | 10 | 0.89% | 3 | Tracked |
| Brinckers | NL | Brand | Core | 10 | 0.89% | 4 | Tracked |
| Ride1Up | Foreign | Brand + retailer | Core | 10 | 0.89% | 1 | Tracked |
| Winora | Foreign | Brand | Core | 9 | 0.80% | 2 | Tracked |
| CARBO | Foreign | Brand + retailer | Core | 9 | 0.80% | 2 | Tracked |

(cont.)

| Entity | Origin | Type | Scope | Resp. | Rate | Models | Status |
|---|---|---|---|---|---|---|---|
| Nederlandse Spoorwegen (NS) | NL | Non-brand | Out of scope | 9 | 0.80% | 4 | Tracked |
| Ananda | Foreign | Brand | Adjacent | 9 | 0.80% | 2 | Tracked |
| BSP | NL | Brand | Core | 9 | 0.80% | 4 | Tracked |
| Mantel | NL | Retailer | Core | 9 | 0.80% | 1 | Tracked |
| Broekhuis | NL | Retailer | Core | 9 | 0.80% | 2 | Tracked |
| QicQ | NL | Retailer | Core | 9 | 0.80% | 2 | Tracked |
| Bol.com | NL | Marketplace | Core | 9 | 0.80% | 1 | Tracked |
| Kieskeurig | NL | Non-brand | Out of scope | 9 | 0.80% | 2 | Tracked |
| Aventon | Foreign | Brand + retailer | Core | 8 | 0.71% | 1 | Tracked |
| Lectric | Foreign | Brand + retailer | Core | 8 | 0.71% | 1 | Tracked |
| Bike24 | Foreign | Retailer | Core | 8 | 0.71% | 2 | Tracked |
| Greens | Foreign | Brand | Core | 8 | 0.71% | 3 | Tracked |
| Ampler | Foreign | Brand + retailer | Core | 8 | 0.71% | 4 | Tracked |
| BULLS | Foreign | Brand | Core | 8 | 0.71% | 3 | Tracked |
| Mahle | Foreign | Brand | Adjacent | 7 | 0.62% | 3 | Tracked |
| Avalon | NL | Brand | Core | 7 | 0.62% | 2 | Tracked |
| SR Suntour | Foreign | Brand | Adjacent | 7 | 0.62% | 2 | Tracked |
| Vyber | NL | Brand | Core | 7 | 0.62% | 3 | Tracked |
| Ecobike | Foreign | Brand | Core | 7 | 0.62% | 2 | Tracked |
| Cervélo | Foreign | Brand | Core | 7 | 0.62% | 4 | Tracked |
| BikeFair | NL | Marketplace | Core | 7 | 0.62% | 1 | Tracked |
| Trustpilot | Foreign | Non-brand | Out of scope | 7 | 0.62% | 1 | Tracked |
| Velozine | NL | Non-brand | Out of scope | 7 | 0.62% | 1 | Tracked |
| Ellio | Foreign | Brand | Core | 6 | 0.53% | 2 | Tracked |
| CONWAY | Foreign | Brand | Core | 6 | 0.53% | 1 | Tracked |
| HillMiles | Foreign | Brand + retailer | Core | 6 | 0.53% | 1 | Tracked |

(cont.)

| Entity | Origin | Type | Scope | Resp. | Rate | Models | Status |
|---|---|---|---|---|---|---|---|
| Het Zwarte Fietsenplan | NL | Retailer | Core | 6 | 0.53% | 1 | Tracked |
| UTO | Foreign | Brand + retailer | Core | 6 | 0.53% | 1 | Tracked |
| Aikema | Foreign | Brand | Adjacent | 6 | 0.53% | 2 | Tracked |
| Bright | NL | Non-brand | Out of scope | 6 | 0.53% | 1 | Tracked |
| Ouders van Nu | NL | Non-brand | Out of scope | 6 | 0.53% | 2 | Tracked |
| Hoogeveen Fietsbeleving | NL | Retailer | Core | 6 | 0.53% | 2 | Tracked |
| Prodrive Folding Bike | Foreign | Brand + retailer | Core | 6 | 0.53% | 1 | Tracked |
| MiRiDER | Foreign | Brand | Core | 5 | 0.45% | 2 | Tracked |
| FUELL | Foreign | Brand | Core | 5 | 0.45% | 3 | Tracked |
| SUPER73 | Foreign | Brand | Core | 5 | 0.45% | 1 | Tracked |
| Tezeus | Foreign | Brand + retailer | Core | 5 | 0.45% | 1 | Tracked |
| Kymco | Foreign | Brand | Core | 5 | 0.45% | 1 | Tracked |
| Roadrider | NL | Retailer | Core | 5 | 0.45% | 2 | Tracked |
| Radon | Foreign | Sub-brand | Core | 5 | 0.45% | 1 | Tracked |
| Euphree | Foreign | Brand | Core | 5 | 0.45% | 1 | Tracked |
| Motinova | Foreign | Brand | Adjacent | 5 | 0.45% | 1 | Tracked |
| Bike43 | Foreign | Brand | Core | 5 | 0.45% | 2 | Tracked |
| Hitway | Foreign | Brand | Core | 5 | 0.45% | 1 | Tracked |
| Lacros | NL | Brand | Core | 5 | 0.45% | 3 | Tracked |
| Azor | NL | Brand | Core | 5 | 0.45% | 3 | Tracked |
| RidersHub | NL | Retailer | Core | 5 | 0.45% | 2 | Tracked |
| Cangoo | NL | Sub-brand | Core | 5 | 0.45% | 1 | Tracked |
| BikeRadar | Unknown | Non-brand | Out of scope | 5 | 0.45% | 1 | Tracked |
| QonQer | NL | Sub-brand | Core | 5 | 0.45% | 1 | Tracked |
| Uebler | Foreign | Brand | Adjacent | 5 | 0.45% | 2 | Tracked |
| ProductScore | Unknown | Non-brand | Out of scope | 5 | 0.45% | 2 | Tracked |

(cont.)

| Entity | Origin | Type | Scope | Resp. | Rate | Models | Status |
|---|---|---|---|---|---|---|---|
| Bikevolt | Foreign | Retailer | Core | 4 | 0.36% | 1 | Tracked |
| QM Wheel | Foreign | Brand | Core | 4 | 0.36% | 1 | Tracked |
| Tomos | NL | Brand | Core | 4 | 0.36% | 3 | Tracked |
| Pfautec | Foreign | Brand | Core | 4 | 0.36% | 2 | Tracked |
| Raleigh | Foreign | Brand | Core | 4 | 0.36% | 3 | Tracked |
| PowUnity | Foreign | Brand | Adjacent | 4 | 0.36% | 1 | Tracked |
| Ruff Cycles | Foreign | Brand | Core | 4 | 0.36% | 1 | Tracked |
| Pinarello | Foreign | Brand | Core | 4 | 0.36% | 1 | Tracked |
| Lidl | Foreign | Retailer | Core | 4 | 0.36% | 2 | Tracked |
| DT Swiss | Foreign | Brand | Adjacent | 4 | 0.36% | 1 | Tracked |
| Bianchi | Foreign | Brand | Core | 4 | 0.36% | 2 | Tracked |
| Fietsenwinkel Barendrecht | NL | Retailer | Core | 4 | 0.36% | 2 | Tracked |
| Fongers | NL | Brand | Core | 4 | 0.36% | 2 | Tracked |
| FLIT | Foreign | Brand + retailer | Core | 4 | 0.36% | 1 | Tracked |
| Ghost | Foreign | Brand | Core | 4 | 0.36% | 2 | Tracked |
| Veloe | Foreign | Brand | Core | 4 | 0.36% | 3 | Tracked |
| Roetz | NL | Brand | Core | 4 | 0.36% | 2 | Tracked |
| RockShox | Foreign | Brand | Adjacent | 4 | 0.36% | 2 | Tracked |
| Starly | NL | Brand | Core | 3 | 0.27% | 1 | Tracked |
| BZEN | Foreign | Brand + retailer | Core | 3 | 0.27% | 2 | Tracked |
| Twindis | NL | Retailer | Adjacent | 3 | 0.27% | 2 | Tracked |
| Refurbed | Foreign | Marketplace | Core | 3 | 0.27% | 2 | Tracked |
| Selle Royal | Foreign | Brand | Adjacent | 3 | 0.27% | 2 | Tracked |
| Hercules | Foreign | Brand | Core | 3 | 0.27% | 2 | Tracked |
| Desiknio | Foreign | Sub-brand | Core | 3 | 0.27% | 2 | Tracked |
| Riesewijk Exclusives | NL | Retailer | Core | 3 | 0.27% | 2 | Tracked |
| AccuNorm | Unknown | Non-brand | Out of scope | 3 | 0.27% | 1 | Tracked |

(cont.)

| Entity | Origin | Type | Scope | Resp. | Rate | Models | Status |
|---|---|---|---|---|---|---|---|
| Pi-POP | Foreign | Brand + retailer | Core | 3 | 0.27% | 1 | Tracked |
| Csepel | Foreign | Brand | Core | 3 | 0.27% | 1 | Tracked |
| Lockride | NL | Brand | Adjacent | 3 | 0.27% | 1 | Tracked |
| H&B Exclusive | NL | Retailer | Core | 3 | 0.27% | 2 | Tracked |
| FabricBike | Foreign | Brand + retailer | Core | 3 | 0.27% | 1 | Tracked |
| RAI Vereniging | NL | Non-brand | Out of scope | 3 | 0.27% | 2 | Tracked |
| Fietsunie | NL | Retailer | Core | 3 | 0.27% | 2 | Tracked |
| Velotric | Foreign | Brand | Core | 3 | 0.27% | 1 | Tracked |
| Nakamura | Foreign | Sub-brand | Core | 3 | 0.27% | 2 | Tracked |
| Fietsenkompas | Unknown | Non-brand | Out of scope | 3 | 0.27% | 1 | Tracked |
| Alltricks | Foreign | Marketplace | Core | 3 | 0.27% | 1 | Tracked |
| Huyser | NL | Brand | Core | 3 | 0.27% | 1 | Tracked |
| Popal | NL | Brand | Core | 3 | 0.27% | 1 | Tracked |
| AXA | NL | Brand | Adjacent | 3 | 0.27% | 1 | Tracked |
| Bikester | Foreign | Retailer | Core | 3 | 0.27% | 1 | Tracked |
| MRA E-Bike Center | NL | Retailer | Core | 3 | 0.27% | 1 | Tracked |
| Revolt Bikes | NL | Brand + retailer | Core | 3 | 0.27% | 1 | Tracked |
| IkMaakJeFiets | Unknown | Non-brand | Out of scope | 3 | 0.27% | 1 | Tracked |
| Fischer | Foreign | Brand | Core | 3 | 0.27% | 1 | Tracked |
| LIGHTEST | Foreign | Brand | Adjacent | 2 | 0.18% | 1 | Tracked |
| GREEN MEAN e-bikes | NL | Retailer | Core | 2 | 0.18% | 1 | Tracked |
| 123ebikes | NL | Retailer | Core | 2 | 0.18% | 1 | Tracked |
| Fiets-Exclusief | NL | Retailer | Core | 1 | 0.09% | 1 | Tracked |
| Bikesland | NL | Retailer | Core | 1 | 0.09% | 1 | Tracked |
| WK Bikes | NL | Retailer | Core | 1 | 0.09% | 1 | Tracked |
| Elektrischefietser.nl | Unknown | Non-brand | Out of scope | 0 | 0.00% | 0 | No match |
| Bikefixr | Unknown | Non-brand | Out of scope | 0 | 0.00% | 0 | No match |
| Bicycling.nl | Unknown | Non-brand | Out of scope | 0 | 0.00% | 0 | No match |
| bestebike.be | Unknown | Non-brand | Out of scope | 0 | 0.00% | 0 | No match |

# 12.3 Data availability

The complete data pack behind this report is published alongside it: the full metrics table (one row per entity × cut), the entity dictionary with aliases and origins, the decisions log, the dropped-candidate list with reasons, the published scale registry, all nine leaderboards, the unqualified appendix, the adjacent-entity table, per-model breakdowns, the source classification, and the machine-readable summary this report reads from. Every figure in this report is reproducible from those files.

All figures reflect a single collection window (5 September 2026) and are subject to the limitations in Chapter 11. This is the **first** Netherlands edition; the study is repeated quarterly, and edition 2 will be the first able to carry mention-rate, MRR and breadth comparisons.

WANT THE DEEPER CUT?

The 147 Core entities that did not clear the threshold, the full 479-domain source classification, and the per-model entity tables behind Chapter 5 are not reproduced in the public report. To request them, or to be notified when the next quarterly edition is published, book a call with the Herm.io team. There is no fee and nothing to buy; it is part of how we share what we learn.

# 12.4 Methodology note

METHOD NOTE

Nine cuts, no trend cut. Scale basis is qualified Core entities within the cut; components are never clipped and 41 exceed 100. Every rate in this report is printed with its denominator, and every cut is named where it is used. Origin is trademark ownership, and Local means the trademark country is the Netherlands — Belgium and Germany are Foreign, and Benelux is not a rollup. Segments are a cut of the question set, not an attribute of entities, and are indicative only.

# 12.5 About Herm.io & disclosure

Herm.io publishes quarterly AI Visibility studies measuring how large language models answer real consumer questions in specific markets and verticals. This edition is independent research. No entity named in this report commissioned it, reviewed it before publication, or paid for placement. The publisher's own domain was checked for in the cited-source data and does not appear, so no exclusion was applied.

Method, data pack and corrections are published in full so that any figure here can be re-derived. Corrections are logged rather than silently amended. Questions and error reports about this edition are welcome.

DISCLOSURE & NEUTRALITY

An entity's score in this report is not an endorsement or an assessment of quality; it is solely a measure of its current visibility within AI models. No service or product offered by Herm.io is sold for the purpose of directly changing the results of this report or guaranteeing a ranking.

REPORT PERIOD

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