

THE ECF CYCLING BAROMETER



EUROPEAN CYCLISTS' FEDERATION

This year ECF launches the first cycling barometer, a new means to compare cycling in all EU countries.

What did we check?



MODAL SHARE

How many people use bicycles as their main mode of transport?

SAFETY

How safe is it to cycle?



MARKET SIZE

How many bicycles are being sold every year?



CYCLE TOURISM

How many cycling trips do tourists take?



CYCLING ADVOCACY

What is the scale of the advocacy groups?

How did we rank?



The results

Denmark

1 25 24 26 23 27 125

Netherlands

1 27 25 25 24 24 125

Sweden

3 24 27 22 26 20 119

Finland

4 21 26 24 27 16 114

Germany

5 22 22 18 21 22 105

Belgium

6 23 20 15 16 26 100

Austria

7 18 17 17 22 21 95

Hungary

8 26 19 8 25 13 91

Slovakia

9 20 18 21 15 14 88

United Kingdom

10 7 15 23 12 23 80

France

11 8 13 19 20 18 78

Slovenia

12 15 8 27 18 9 77

Czech Republic

13 16 14 13 19 7 69

Ireland

14 10 23 7 14 11 65

Estonia

15 12 9 20 5 10 56

Italy

15 11 10 10 8 17 56

Greece

17 9 21 9 10 5 54

Latvia

17 17 12 2 17 6 54

Luxemburg

19 5 5 6 11 25 52

Lithuania

20 13 6 14 6 8 47

Poland

20 19 11 3 13 1 47

Cyprus

22 23 16 1 19 41

Portugal

23 4 4 12 4 12 36

Spain

23 3 16 4 9 4 36

Bulgaria

25 6 11 7 15 30

Romania

25 14 7 5 3 1 30

Malta

27 11 11 11 15

Sources

MODAL SHARE

Eurobarometer Survey
http://ec.europa.eu/public_opinion/flash/fl_312_en.pdf

SAFETY

CARE database, weighted by user
http://ec.europa.eu/transport/road_safety/pdf/statistics/2011_transport_mode.pdf
 except for Lithuania:
<http://www.lakd.lt/lt.php/navijenos/12>

MARKET SIZE

Calculation by COLBI/COLIPED, EU bicycle industry association
<http://www.coliped.com>

CYCLE TOURISM

European Parliament Study, 2012
<http://www.ecf.com/wp-content/uploads/studiesdownload.pdf>

BICYCLE ADVOCACY

Figures from ECF member organizations
<http://www.ecf.com/about-us/our-members>

ECF CYCLING BAROMETER TECHNICAL DOCUMENT

European Cyclists' Federation

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DATA SETS

The ECF cycling barometer takes into account 5 different criteria which cover the key fields addressed by ECF's work as the umbrella body for cycling advocacy in Europe

The first one is the **modal share**, using the [EU barometer survey](#). Modal share is the most used data in terms of comparing levels of cycling as a transport mode. It gives a snapshot at one moment of the importance of cycling in general in one country.

The second is linked to **road safety**. One of ECF's 2020 objective is to halve the rate of cyclists killed in Europe. We used the [CARE database](#) which gathers all EU road safety data at EU level and is regularly updated. We compared this to the numbers of daily cyclists calculated from the modal share survey above to get a relative level of cyclist safety.

The next criteria is linked to **cycling tourism**. Our objective is to complete the EuroVelo network by 2020. Leisure cycling infrastructures have huge return on investment and they might also be used for transportation reasons. Therefore we took into account the **volume of the cycling tourism market** as calculated by the European parliament study. [The European cycle route network EuroVelo study](#) has been published in 2012 by the European Parliament and evaluates the challenges and opportunities of developing a cycle tourism network across Europe.

To assess the relative health of the cycling industry and to get a picture of the state of the market across the EU we have used the data from the [Colibi-Coliped market profile](#)

The last criteria is linked to the size of the recognized cycling advocacy organizations. We believe it is important to have strong national representation of the bicycle users. Strong advocacy organization can make the cyclists' voices be heard whenever necessary and work with governments to develop cycling in their country. We used the membership figures of [ECF affiliated groups](#).

LIMITATIONS ON THE ANALYSIS

We acknowledge that there are limitations on this data and the extent to which such data sets can be compared.

We are also subject to the limits on each study which have already been identified by the original researchers however we believe we have chosen data sets that have proven to be robust enough for the context of a discussion document and to raise the issue of international benchmarking of cycling.

For our own work we identified the following known limitations:

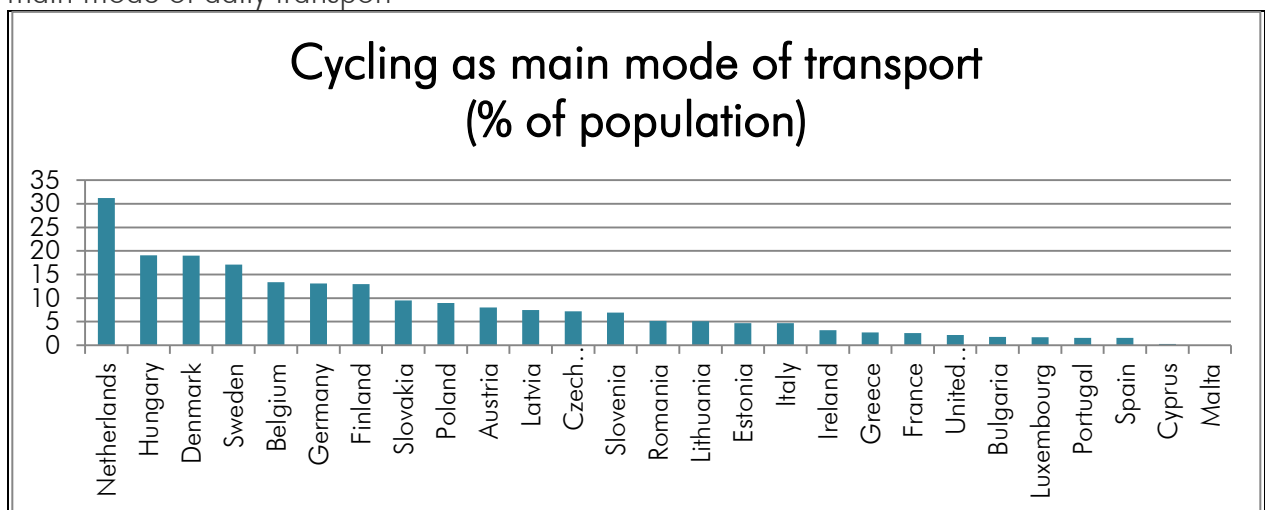
- Our biggest concern is that not all data is available across the same time periods. Our campaigning aim from this work is to get the EU to acknowledge the importance of reliable cycling data across both time and countries so that these data sets and others will be updated on a regular basis. However we do know that the rate of change in cycling statistics at a national level is generally very slow moving so are confident that the data is robust enough for ranking countries.
- No attempt has been made to weight the five criteria by importance, they are given equal status.
- We have figures available for cycle tourism and the cycling market by value, however it was not possible to correct them for relative purchasing power and currency fluctuations so we have chosen to use trips and unit sales of bicycles as a more even measure.
- The road safety calculation creates an index of relative safety. In all countries it would be possible to make a correction to the base calculation of number of cyclists by excluding population groups that may not travel daily such as the very old and the very young but we believe that to get a relative level of safety these calculations would not change the relativity between countries. Our calculation does show relative levels that compare well to studies of small number of countries, for example in Safety in Numbers calculations.

CALCULATION AND RESULTS

Here you can find detailed explanation of the calculation for each criteria and the result as a graph. For making the barometer countries were given points according to their rank, not according to the value of the result.

MODAL SHARE

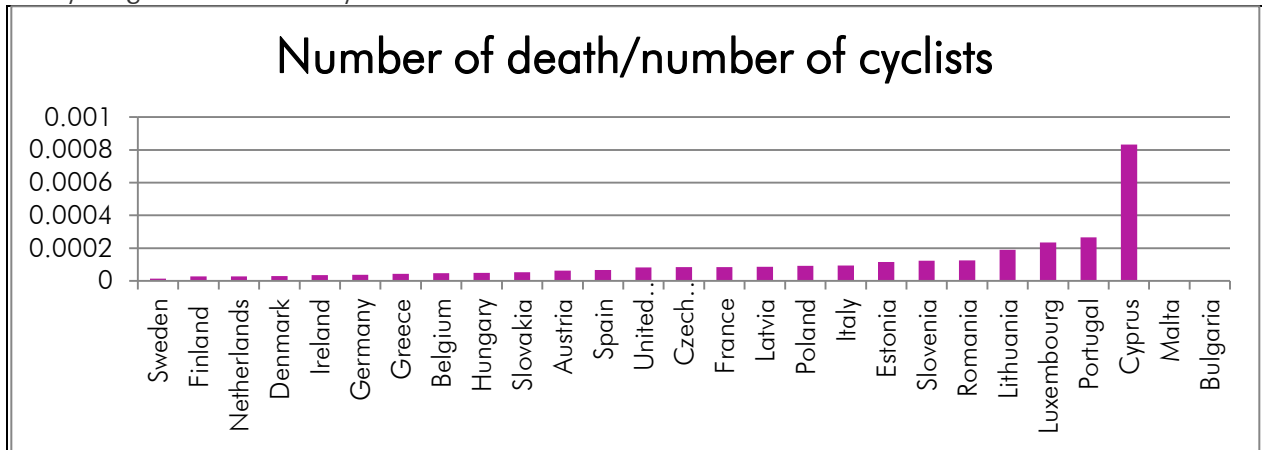
For modal share we use the figure given by the Eurobarometer survey without any further recalculation. This is measure of respondents to an EU wide survey giving cycling as their main mode of daily transport



SAFETY

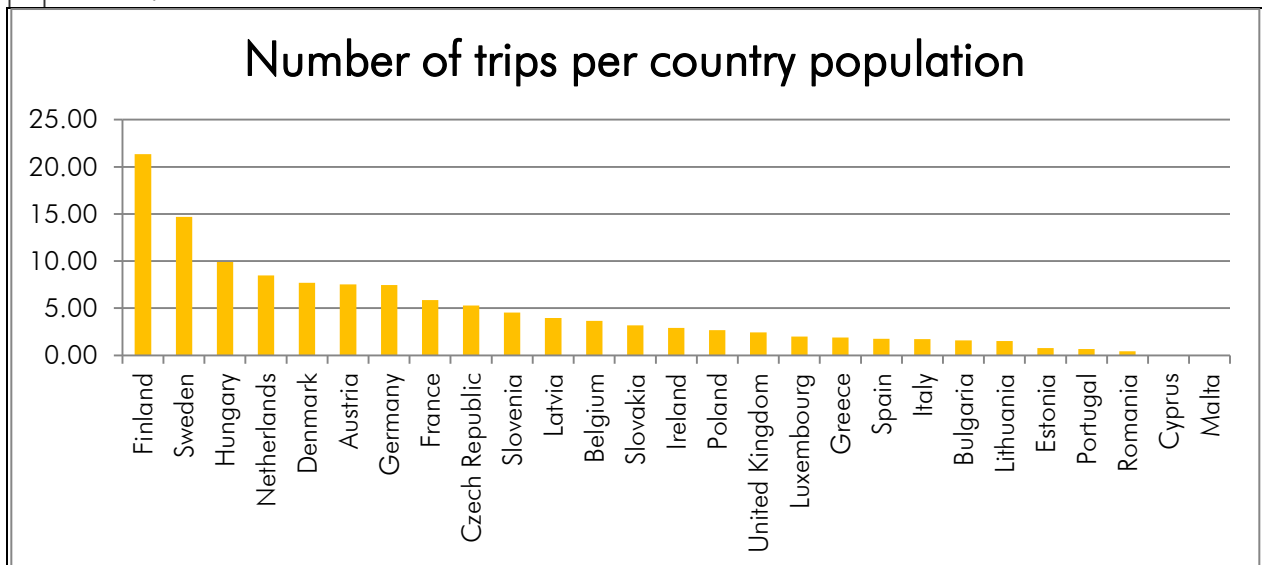
For road safety we used as a base the total number of daily cyclists. We were able to estimate this by multiplying the modal share by the population of the country.

We then divided the number of killed cyclists by this population to get a relative safety index for cycling in each country.



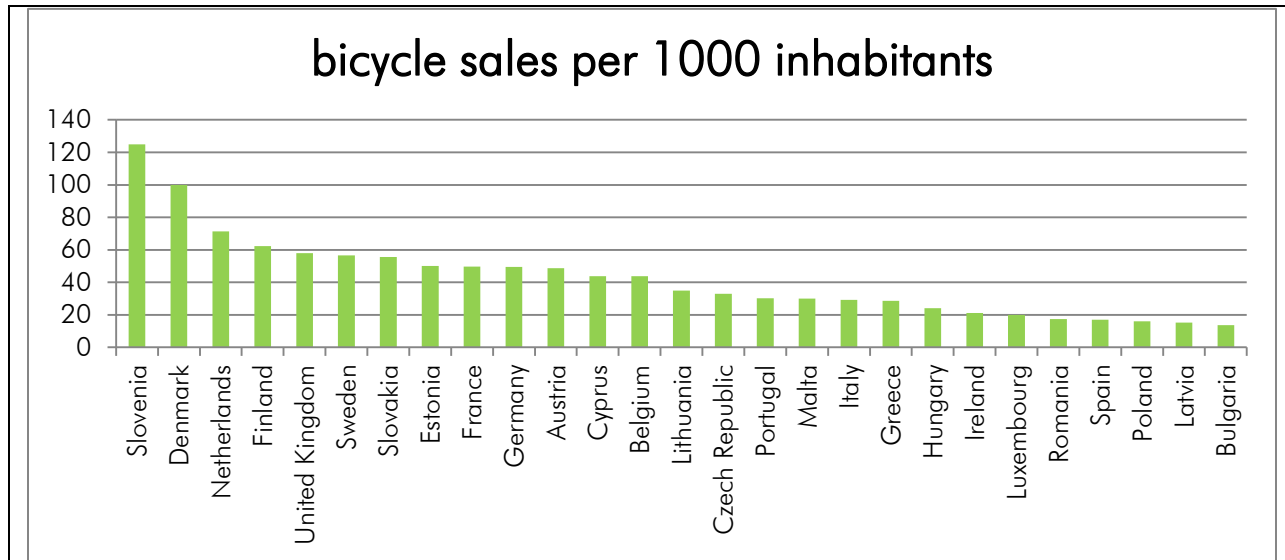
CYCLING TOURISM

For cycling tourism we divided the number of cycle tourism trips recorded by the country population.



BICYCLE MARKET

For market size we divided the number of units sold per year by the country population.



ADVOCATES

For Advocacy strength we divided the number of individuals within ECF affiliated groups by the country population.

