Economic benefits of increased cycling: A European perspective
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Benefits of a Bicycle

- Puts a big fat smile on your face
- Shapes up that boodie
- Zero emissions
- Slows global warming
- Whizzes past traffic jams
- Gives you legs of steel
- It carries your goodies home
- It Feels like flying
- Faster and easier than walking
- It's as quiet as a mouse
- No need to pay for gas, parking fees, or auto insurance...hurray!
- The Earth sends a lil extra luv to those on bicycles
  (this is scientifically documented)

www.ecf.com
The New Cycling Economy: €205 bn /year

internal and external benefits of cycling together

7.4% bicycle use (Eurobarometer 2010) + turnover of related industries

> €400/person EU
The New Cycling Economy: € 205 bn/year

<table>
<thead>
<tr>
<th>Type of benefit</th>
<th>In € for 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Health benefits: reduced mortality</td>
<td>€ 114 – 121 bn</td>
</tr>
<tr>
<td>2 Congestion-easing</td>
<td>€ 24.2 bn</td>
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<tr>
<td>3 Fuel savings at US$ 100/ barrel</td>
<td>€ 2.7 – 5.8 bn</td>
</tr>
<tr>
<td>4 Reduced CO2 emission</td>
<td>€ 1.4 – 3.0 bn</td>
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<tr>
<td>5 Reduced air pollution</td>
<td>€ 0.9 bn</td>
</tr>
<tr>
<td>6 Reduced noise pollution</td>
<td>€ 0.3 bn</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>€ 143.2 – 155.2 bn</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>Type of industry</th>
<th>In € for 2010/2011</th>
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</thead>
<tbody>
<tr>
<td>1 Tourism industry</td>
<td>€ 44 bn</td>
</tr>
<tr>
<td>2 Bicycle industry</td>
<td>€ 18 bn</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>€ 62 bn</td>
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• Health benefits have largest share: 114-121 billion €
• Base: 77 billion km/year cycled by adult population
• 7% daily cyclists, 43% regular/occasional, 50% don't cycle
New report: Turn up the HEAT

- Assessing use of HEAT across Europe
- Giving recommendations on how to increase use
Jobs and Job Creation in the EU Cycling Economy

• Contribution of cycling sector to green growth in Europe
ECF STUDY: SET-UP

Step 1: Sector definition
- Bicycle market definition
- Sector and sub-sectors

Step 2: Economic value
- Turnover
- Investment

Step 3: FTE Jobs
- FTE jobs/1M turnover
- FTE jobs/1M investment
ECF STUDY: RESULTS

Jobs in the European cycling sector

Today

- Bicycle tourism: 524,052
- Bicycle retail: 80,587
- Bicycle infrastructure: 23,417
- Bicycle industry: 22,629
- Bicycle services: 4,224

Doubling cycling modal share

- Bicycle tourism: 869,927
- Bicycle retail: 122,196
- Bicycle infrastructure: 36,484
- Bicycle industry: 32,133
- Bicycle services: 8,448

* Full-time equivalents (EU-27)
Cycling means more jobs and an inclusive economy

More jobs
Per € million of turnover, the bicycle manufacturing sector employs 3 times more people than the car manufacturing sector
Per € million of turnover, the bicycle sale sector employs More than 4 times more people than the car sale sector

Inclusive Europe
The study shows that a number of the jobs do not require high levels of qualification. By providing easily accessible employment for groups that are disadvantaged on the labour market because of their low qualification levels, this offers an opportunity to contribute to the objectives of an inclusive Europe.
The innovation potential of the bike sector

- Cutting-edge technology, strong R&D and innovation
- Fastest growing sector in e-mobility in the world
- Re-shoring of manufacturing from Far East to Portugal, Belgium, Romania, UK and many others
Quiz time!

1. How many customers do their shopping by car?
   a. 22%
   b. 41%

2. How many customers come by bike?
   a. 6%
   b. 10%

3. How many customers live within 0.5 miles of the shop?
   a. 12%
   b. 42%
Quiz time!

1. How many customers come by car?
   a. 22%
   b. 41% → this is what Bristol shopkeepers think!

2. How many customers shop by bike?
   a. 6% → this is what Bristol shopkeepers think!
   b. 10%

3. How many customers live within 0,5 miles of the shop?
   a. 12% → this is what Bristol shopkeepers think!
   b. 42%
Shopping by bike

In EU28, shoppers that travel by bike account for a consumption volume of 111bn euros.

Doubling the cycling modal share in the EU (excluding Croatia) would generate an additional 27bn euros for local retailers.
Shopping by bike

In different EU cities:

- Cyclists spend more than car drivers
- Shop-owners overestimate the share of customers coming by car
- Traffic calming most often leads to more turnover for retailers
- More on www.ecf.com
Thank you for your attention!

Get in touch:

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