Presentation of ECF cycling barometer 2015 edition

The ECF Cycling Barometer is an attempt to put in perspective the cycling landscape of each EU member state.

Our message is that a sound cycling policy needs to be backed up and monitored with proper data. This data is definitely lacking at the national level in most European countries. During Velo-city 2015 we have numerous sessions looking at data collection and analysis as it remains of high importance to be able to study the outcome and results of advocacy campaigns and policy implementation.

Comparing European countries and the state of their cycling across numerous fields is still a challenge today, even within the European Union. Different national statistics and lack of data collection make it hard to be certain about the cycling record of each country. Uniquely the ECF Cycling Barometer took five verifiable EU-wide surveys and therefore eliminated different treatments given to cycling in EU member states. The countries are given points according to their rank in each category and all points are summed to get a final score. The five categories for the Barometer are: bicycle modal share, road safety, cycling tourism, number of cycling advocates, and bicycle sales.

The results

This year we have only one winner compared to the last edition where both the Netherlands and Denmark came out on top. This year the top country is Denmark. Denmark took the lead because of its high level of cycling advocates, even though the Netherlands led most of the variables. Sweden comes in third place. France is ranked 12th out of the 28 EU-Member States

France and conclusion

The story in France remains largely stable. Stories coming out of Paris, Bordeaux, Strasbourg, and - of course – Nantes, show that at a policy level this is a huge shift towards cycling. France increased its safety and modal share ranking since the 2013 Barometer.

ECF is very enthusiastic about the results of the Cycling Barometer and what is happening in France. For us it is a great show of the constant cycling advocacy done in EU member states and of the work and ideas that come out of the Velo-city conferences. The Barometer provides us with a tool to analyse and contextualize our work. We are happy to announce that the 2015 ECF Cycling Barometer will be released mid-May in the lead-up to Velo-city 2015 Nantes.

ECF Cycling Barometer 2015 – Overview table

European Cyclists' Federation

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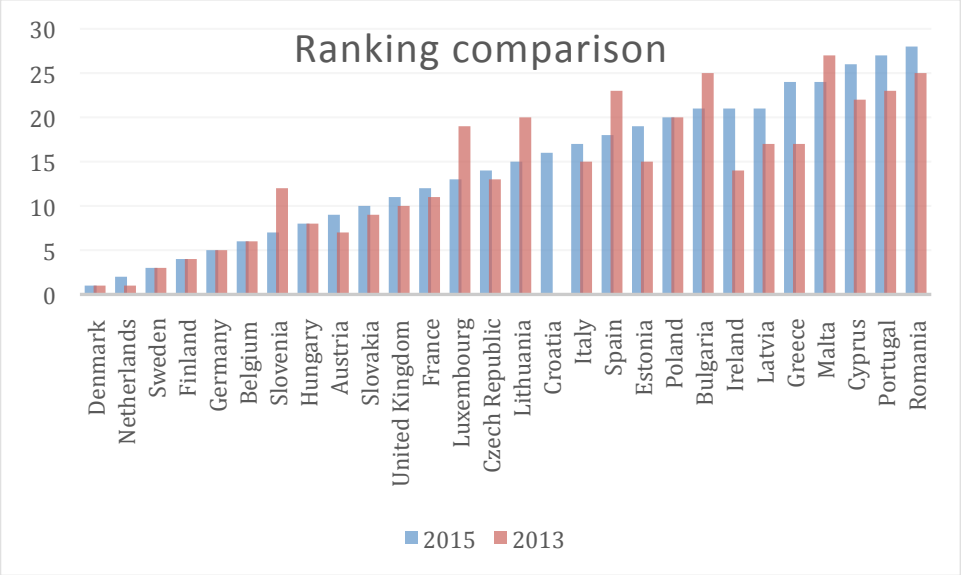


1	Denmark
2	Netherlands
3	Sweden
4	Finland
5	Germany
6	Belgium
7	Slovenia
8	Hungary
9	Austria
10	Slovakia
	United Kingdom
12	France
13	Luxembourg

14	Czech Republic
15	Lithuania
16	Croatia
17	Italy
18	Spain
19	Estonia
20	Poland
21	Bulgaria
	Ireland
	Latvia
24	Greece
	Malta
26	Cyprus
27	Portugal
28	Romania

ECF CYCLING BAROMETER 2015 TECHNICAL DOCUMENT

European Cyclists' Federation

Chloe Mispelon, Communications Officer, c.mispelon@ecf.com

18 May 2015

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 **cycling usage**, we have used the EU barometer survey. For this Preferred daily mode of transport is a widely 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 took into account the cycling fatalities; we compared this to the numbers of daily cyclists calculated from the most often used daily mode of transport 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 Conebi market profile.

The last criterion 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. In addition, we did not have data for the second-hand bike markets' numbers; just new bike sales were included.

- Croatia was not included in the EuroVelo study published by the European Parliament in 2012, therefore cycling tourism data is missing for that country (no new EU wide study published on this topic since then). We gave the minimum score to the country; however because of missing data in this criterion Croatia's overall cycling barometer position in reality could be higher.

- Comparison with ECF Cycling Barometer 2013 might be limited because there is one additional country now in the EU – Croatia – and this effects rank calculation. However, relative ranks of countries to each other can be compared, as well as improvements, setbacks in the five separate criteria.

- NGO membership structure is different country by country; therefore advocates number calculations may differ country by country.

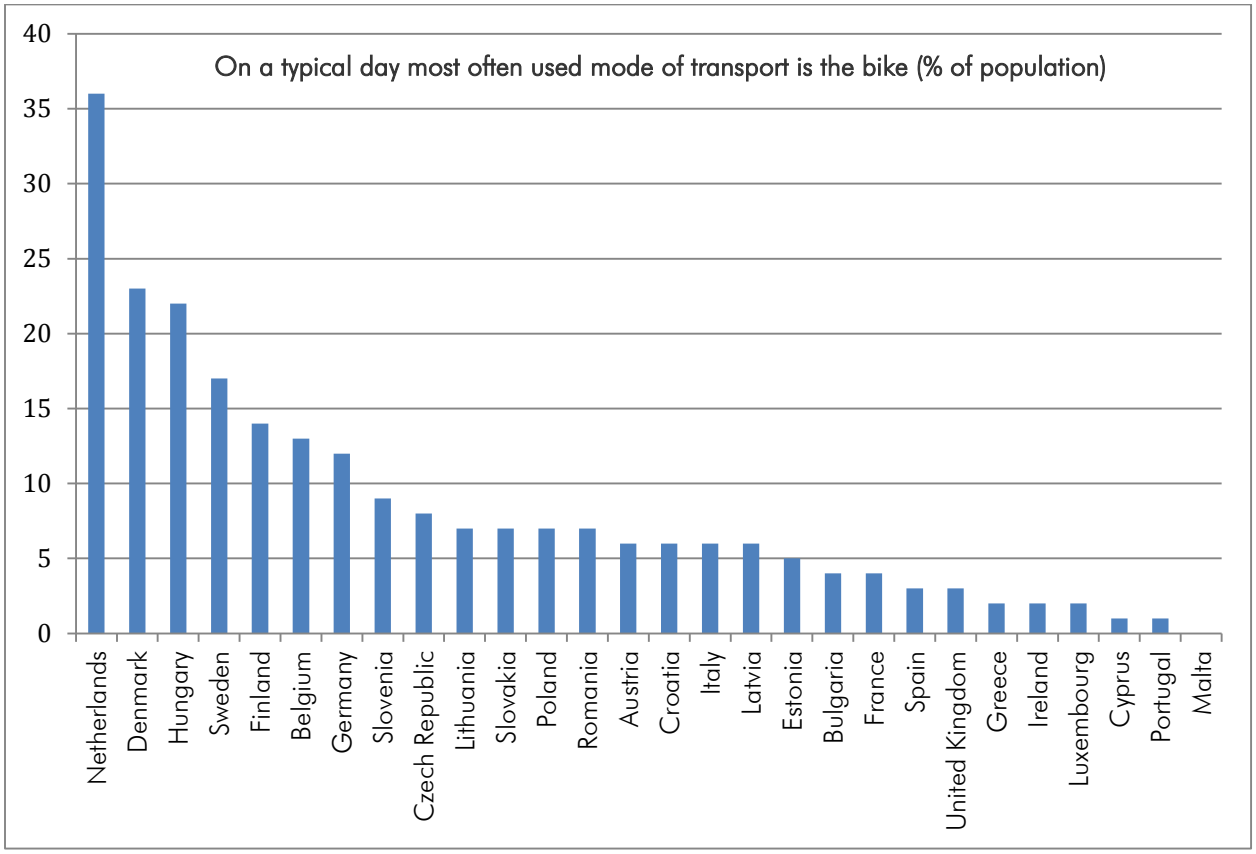
- The "road safety" criteria is based on the number of cyclists fatalities registered in the CARE database, a low level of fatalities can be a sign of a very safe country or a country with very few bicycle users. Therefore we have weighted this number by the number of cyclists in the country. With no cyclists killed on the roads, Luxembourg and Malta mathematically went to the first rank, the weighing not being able to balance the 0 threshold effect.

CALCULATION AND RESULTS

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

MOST OFTEN USED DAILY TRANSPORT MODE

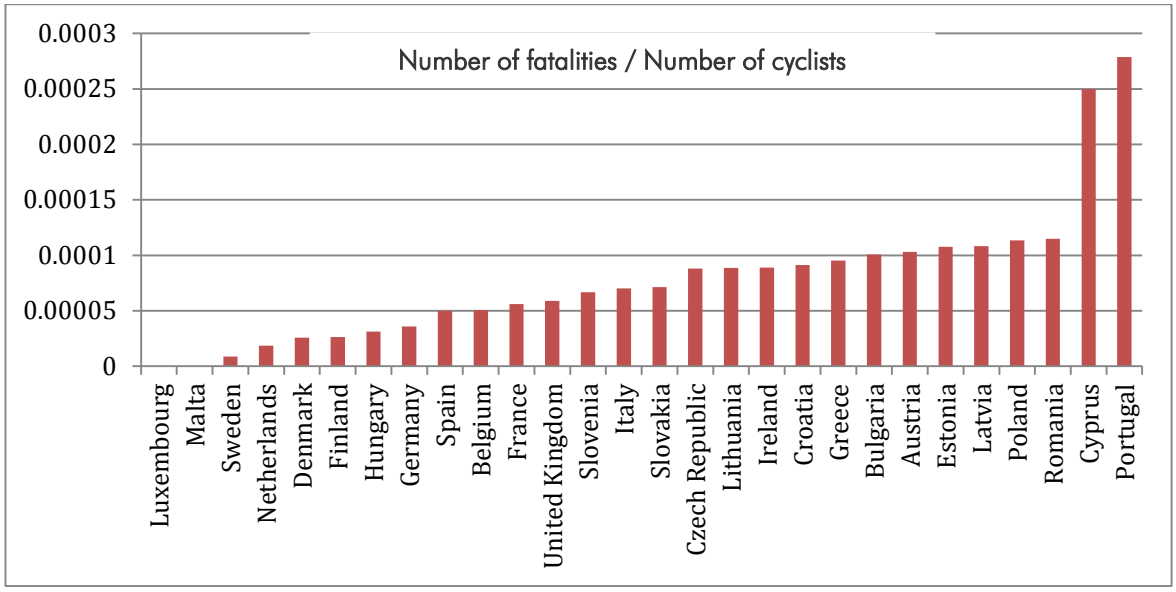
For the most often used daily mode of transport we used the figure given by the Eurobarometer 2014 survey without any further recalculation. This is a measure of respondents to an EU wide survey giving cycling as the most often used mode of transport on a typical day.



SAFETY

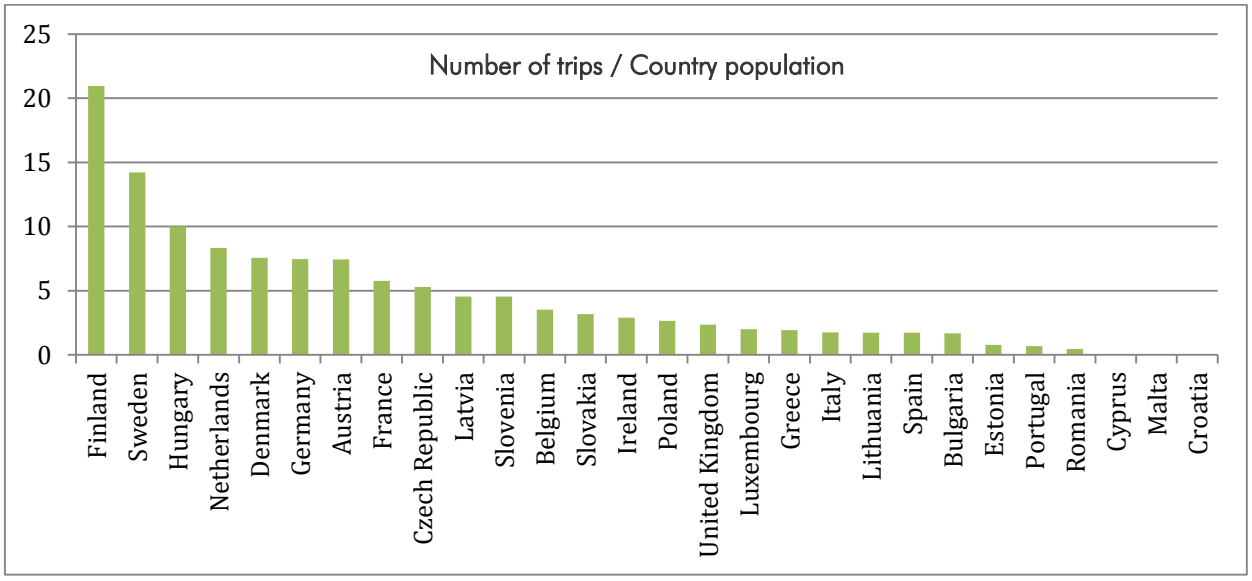
For road safety we used the total number of daily cyclists. We were able to estimate this by multiplying the most often used daily mode of transport on a typical day data (the bicycle) by the population of the country.

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



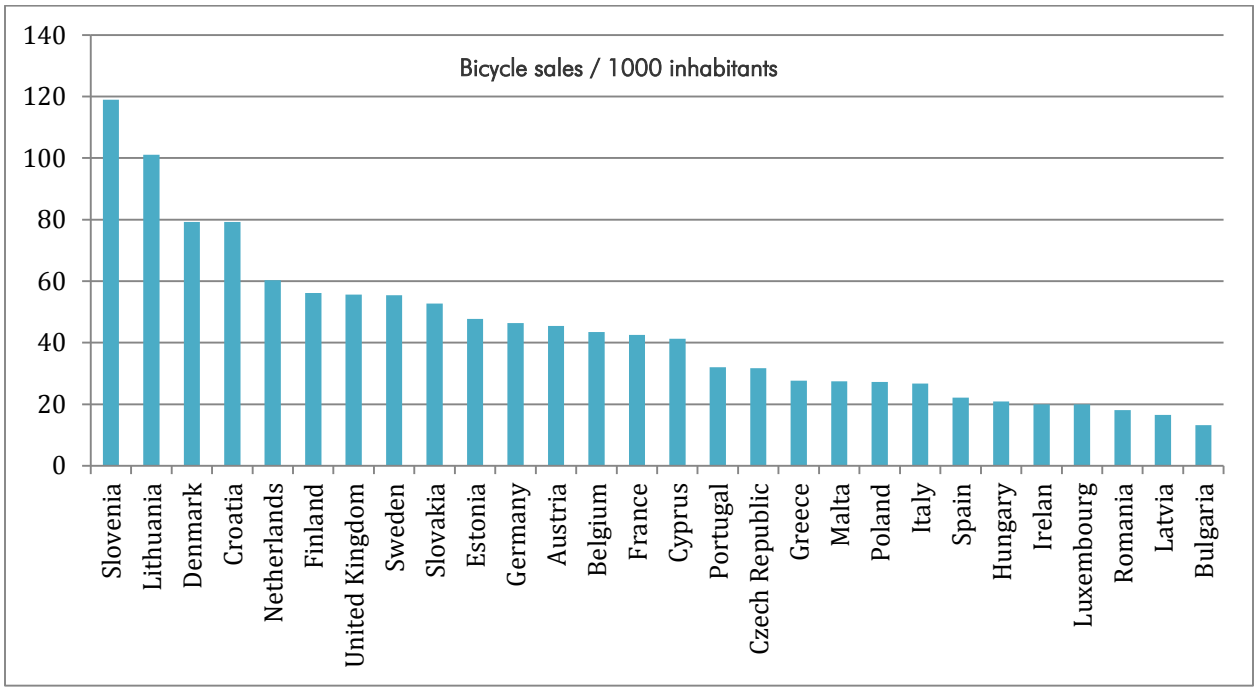
CYCLING TOURISM

For cycling tourism we divided the number of cycle tourism trips recorded by the country population (day and overnight trips too).



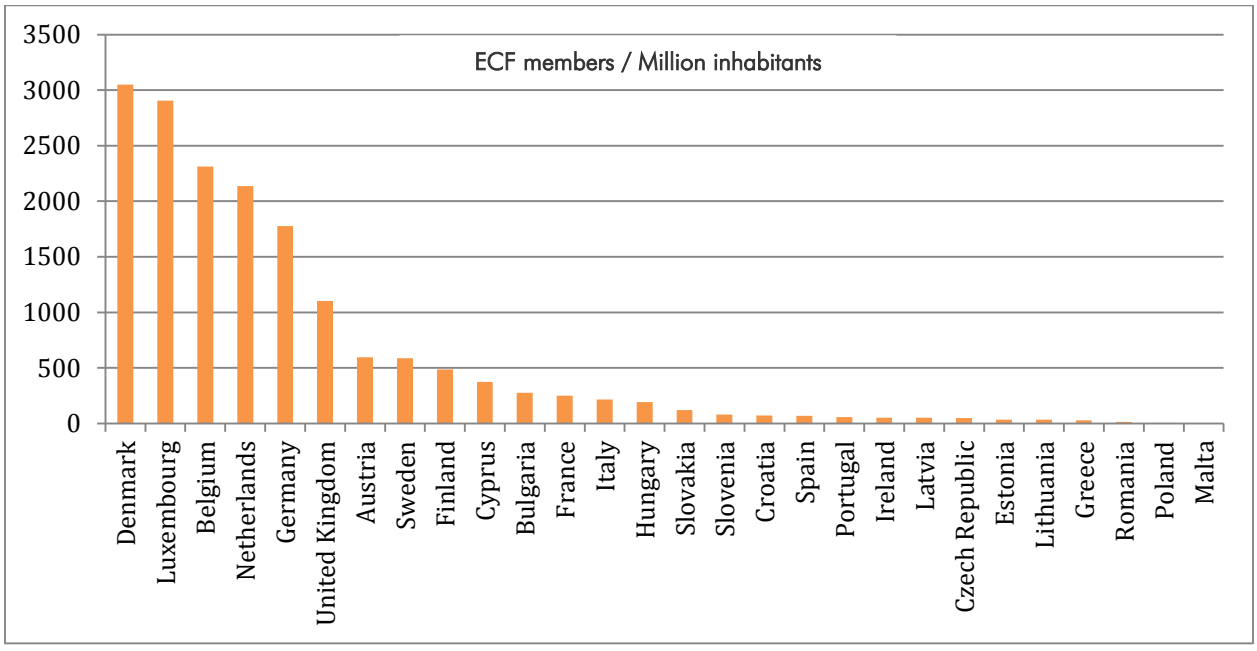
BICYCLE MARKET

For market size we divided the number of new 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.



ECF
EUROPEAN CYCLISTS' FEDERATION

THE ECF CYCLING BAROMETER 2015

WHAT DID WE CHECK?

CYCLE USAGE
ON A TYPICAL DAY HOW MANY PEOPLE SAY THAT THE BIKE IS THEIR MOST OFTEN USED MODE OF TRANSPORT?

SAFETY
HOW SAFE IS IT TO CYCLE?

CYCLE TOURISM
HOW MANY CYCLING TRIPS DO TOURISTS TAKE?

MARKET SIZE
HOW MANY BICYCLES ARE BEING SOLD EVERY YEAR?

CYCLING ADVOCACY
WHAT IS THE SCALE OF THE ADVOCACY GROUPS?

Comparison of cycling in all countries in Europe

Second ECF cycling barometer

HOW DID WE RANK?

ALL COUNTRIES WERE GIVEN POINTS IN EACH CATEGORY ACCORDING TO THEIR RANKS AMONG THE 28 EU COUNTRIES. THE POINTS WERE THEN ADDED FOR THE FINAL RESULT.

TOP RESULTS

1. DENMARK
2. THE NETHERLANDS
3. SWEDEN

TOP RESULTS IN EACH CATEGORY

- #1 Luxembourg and Malta for ROAD SAFETY
- #1 The Netherlands for CYCLING USAGE
- #1 Finland for CYCLING TOURISM
- #1 Denmark for CYCLING ADVOCACY
- #1 Slovenia for MARKET SIZE

TOP RESULTS

ECF CYCLING BAROMETER 2015

- #1 Luxembourg and Malta for ROAD SAFETY
- #1 The Netherlands for CYCLING USAGE
- #1 Finland for CYCLING TOURISM
- #1 Slovenia for MARKET SIZE
- #1 Denmark for CYCLING ADVOCACY

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