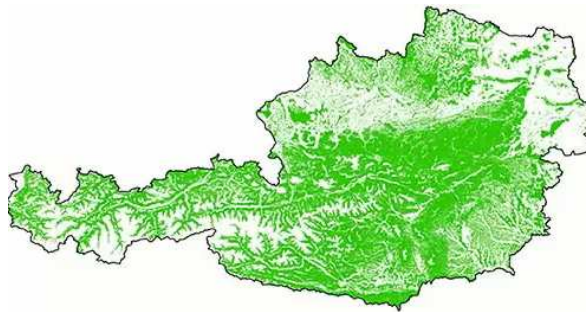


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# Cycling Economy in Austria

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# Cycling Economy Austria

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## Background

Study 2009

- contracted by the “Federal Ministry of Agriculture, Forestry, Environment and Water”
- conducted by invent, in cooperation with Vienna University of Technology

## Approach

- 300 interviews in different economic sectors (manufacturing, trade, services, etc.) based on its real quantity structure; figures: net sales, jobs, trends;
- application of existing data (tourism - countings, daily expenditures);



# Cycling Economy Austria

## Economic sectors

E-Bikes



Cycle Sport Events



Services (Repair/Rental)



Cycle Tourism



Manufacturing



Trade (whole sale / retail)



Infrastructure



### **Economic impact**

#### **Direct impact**

- Value added: 601,9 Mio. Euro
- Jobs: 10.865 (full time equivalent)

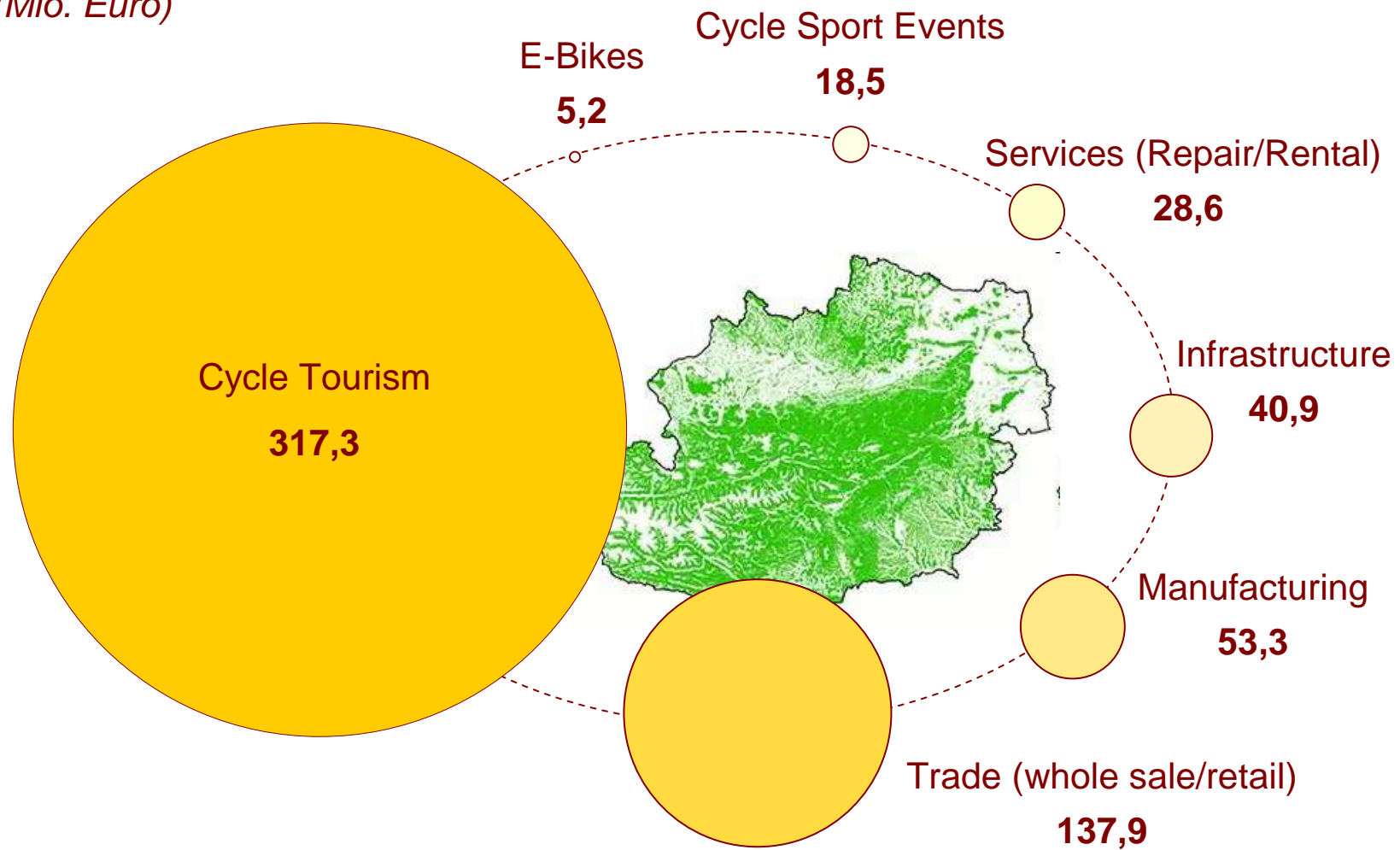
#### **Direct and indirect impact**

- Value added: 882,5 Mio. Euro
- Jobs: 18.328 (full time equivalent)

# Cycling Economy Austria

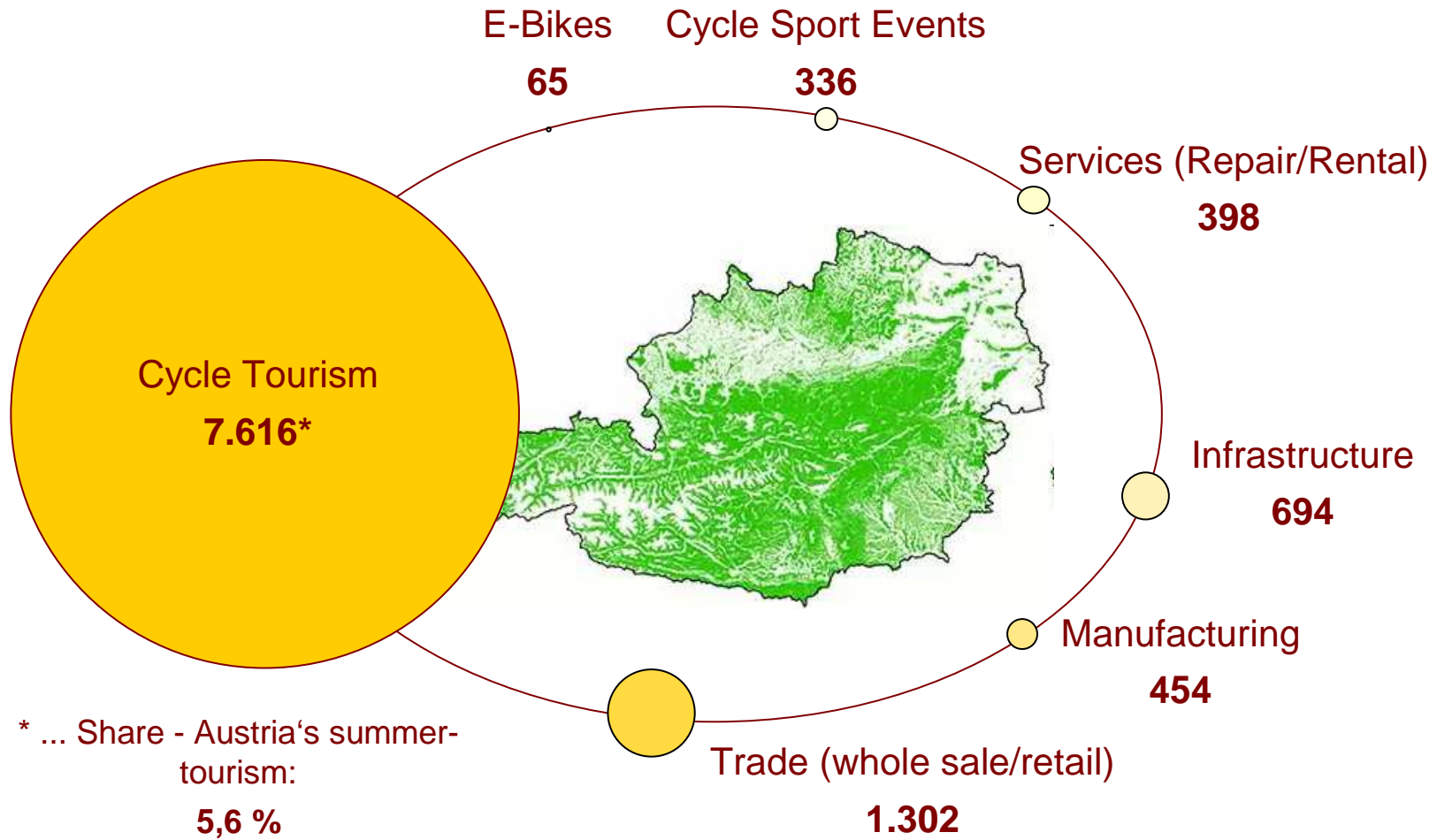
## Direct impact - value added

(Mio. Euro)





Direct impact - Jobs



## Market development and trends 2013



### Cycle Tourism

- slight increase on a high level
- new dynamics driven by certification of quality and
- e-Bikes (share: 6 – 10 %, max. 15%)
- emerging top-routes aside the Danube cycle track (Alpen-Adria, Traisental-Radweg, etc.)



### Trade (whole sale / retail)

- steady development 387.579, + 1 % (2012-11)
- decrease Mountain-/Trekking-Bikes
- increase E-Bikes (share: 10 %)
- increase tires (indicates more kilometer per year on bicycle)



### Manufacturing

- steady development (205.000)
- E-Bikes (KTM – 1/3 of production 2012)
- tailored products (regions, national parks, etc.)

## Market development and trends 2013



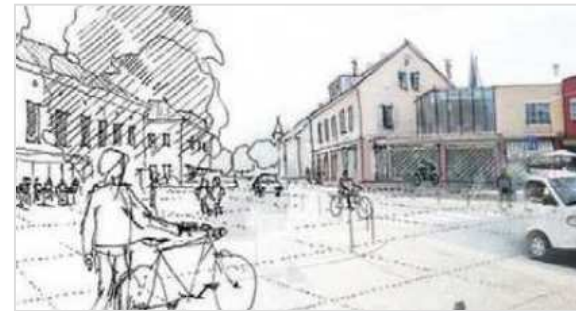
### Infrastructure

- political goal: increasing modal split
- positive demand on local level (municipalities, etc.)
- emerging new frame conditions by law (cycle highways, etc.)
- new approaches in traffic planning (shared space, traffic calming, intermodality, etc.)



### Services (Repair/Rental)

- new dynamics driven by e-bikes
- more focus on quality-bikes



### Cycle Sport Events

- more than 400 events
- steady development,
- not only high-performance-events (cycling and culinary experience, etc.)



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## **Attachement - Methodology**

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## **CYCLING ECONOMY IN AUSTRIA**

### **Methodology**

1. Preparation of data
2. Evaluation direct impact – net creation turn over / jobs – regional (Länder) and national level; based on inquiries by assuring discreteness and empirical data;
3. Input-/Output-Analysis
4. Assessment of important innovations

Preparation of data (1) and evaluation of direct impact (2)

<p><b>PRODUCTION – BIKES, COMPONENTS AND RELEVANT ACCESSORIES</b> (40<sup>1</sup>)</p>	<ol style="list-style-type: none"> <li>1. definition quantity structure – national / regional level (basic population)</li> <li>2. Research - variation share figures domestic creation of value by spot check (no figures available in Austria)</li> <li>3. Interviews with the competent contact person in the companies – raise net turnover / jobs + demand</li> </ol>
<p><b>E-BIKES</b> (20)</p>	<ol style="list-style-type: none"> <li>1. No empirical figures available – emerging trend – estimation of expected sale figures (point of sale) by 10 of relevant companies (whole sale / retailer) on national level</li> <li>2. Net turnover &gt; spot check creation of value and jobs + demand</li> </ol>
<p><b>TRADE – WHOLE SALE AND RETAIL SALE</b> (30)</p>	<ol style="list-style-type: none"> <li>1. Definition quantity structure – national / regional level (basic population)</li> <li>2. Research – share bikes/components/accessories in sport shops by spot checks</li> <li>3. Utilisation empirical figures (national statistic) / revisal - variation share figures domestic creation of value by spot check – bike shops / sport shops</li> <li>4. Interviews with the competent contact person in the companies ... net turnover &gt; spot check creation of value and jobs + demand</li> </ol>
<p><b>SERVICES – RENTAL AND REPAIRATION</b> (15)</p>	<ol style="list-style-type: none"> <li>1. Estimation quantity structure – national / regional level (basic population)</li> <li>2. Utilisation empirical figures – sports research / revisal - variation share figures domestic creation of value by spot check – bike shops / sport shops / rental stations</li> <li>3. Interviews with the competent contact person in shops and rental stations ... net turnover &gt; spot check creation of value and jobs + demand</li> </ol>

<sup>1</sup> number of interviews (companies, organisers, tourism management, public authorities funding infrastructure, etc.); operation in 3 steps: 1) phone call for matching the competent person, 2) make an appointment for interview followed up by sending the list of questions by e-mail, 3) carrying out the interviews by phone;

<b>TOURISM</b>	one of the most challenging chapters ...
<b>1. Tourism</b> (25)	<ol style="list-style-type: none"> <li>1. Utilising latest figures – share of cyclists on total number of overnight stays / day trips of tourists (survey – national / regional); cycling as the key motive for cycling holidays / day trips (min. 1 full day, not cycling as one of some activities in holidays!)</li> <li>2. Calculation of the corresponding daily expenditures based on general figures of relevance;</li> <li>3. Definition quantity structure – holiday cyclists / day trippers (not spontaneous trips – substitution effect is too high) based on 3 relevant studies in regions based on countings; the show some affinity in the quantitative structures; revisal by some spot checks with competent partners on the main routes and destinations;</li> </ol>
<b>4. Guides Tours</b> (12)	- Interviews stakeholders - net turnover / jobs
<b>5. Relevant Tour Operators</b> (5, assessment)	- Assessment Turnover / Jobs for Austria in general by 5 important tour operators - net turnover / jobs; it was not possible to receive data by each operator (env. 25 in Austria)
<b>6. MTB-Parks</b> (11)	- Interviews stakeholders - all Parks in Austria - net turnover / jobs
<b>7. Rental service at tourism destinations</b> (52)	- Inquiry of all providers in Upper Austria – extrapolation for Austria
<b>8. Transport Services – Train / Bus / ships / ferry boats</b> (40)	- Inquiry of all providers in Austria – national rail company, private rail providers, scheduled bus services, private shuttle services, ships + ferry boats (rivers ... Danube, etc., lakes);
<b>9. Guides and maps</b> (8)	- Inquiry of all relevant editors in Austria – net turnover, jobs;

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<b>SPORTS – EVENTS, MARATHON, CHAMPIONSHIPS, ETC.</b> (60)	<ul style="list-style-type: none"> <li>- Definition quantity structure at national level: MTB – 8 different categories; road bike races – 6 different categories; all together: 390 in Austria;</li> <li>- inquiry sample 60 organisers representing each category; issues: a) number of participants + assessment share of accompanying persons (family) + relevant overnight stays and daily expenditures; b) budget (structure – organisation, incl. voluntaries, trophy money + presents, marketing);</li> </ul>
<b>INFRASTRUCTURE</b> (15)	1. Collecting data investment from government and funding bodies – national level and regional level (9 Bundesländer)
<b>1. Training</b> (4)	<ul style="list-style-type: none"> <li>- Inquiry of all providers in Austria – net turnover, jobs;</li> </ul>

### **Input-/Output-Analysis**

Utilising empirical data (national statistics), carried out by an expert (economics, econometrics) at the Technical University of Vienna;

### **Assessment of important innovations**

Part of the interviews with about 3 – 10 competent contact persons representing every issue (production, e-bike, trade, services, tourism, sports, infrastructures).