

We Ride Australia



THE AUSTRALIAN CYCLING ECONOMY 2021 REPORT

20 October 2021

The Australian Cycling Economy Report - Estimating the size and scope of the Australian Cycling Economy in 2020

We Ride Australia ('WeRide') is the national independent voice for cycling in Australia. WeRide's mission is to build a healthy, sustainable future through advocacy, program development and research around the bicycle's role in environment, health, infrastructure and safety.

WeRide has engaged Ernst & Young ("EY") to conduct a study estimating the economic contribution of the cycling economy to Australia in 2020 (the "Study"). The Study is attached to this letter, which outlines the outcome of the work undertaken by EY and the basis on which the work was performed.

The Study was funded with support from the following Corporate and Supporting Partners of WeRide:

Corporate Partners



Supporting Partners



Yours faithfully



Peter Bourke

Executive Officer
We Ride Australia
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The Australian Cycling Economy

Estimating the size and scope of the
Australian Cycling Economy in 2020

We Ride Australia

October 2021



EY

Building a better
working world



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About this report

Estimating the size and scope of the Australian Cycling Economy in 2020.

In June 2021, We Ride Australia commissioned EY to conduct a study estimating the economic contribution of the cycling industry to Australia in 2020.



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Disclaimer

EY was engaged on the instructions of We Ride Australia ('Client') and in accordance with the terms of our engagement agreement dated 11 June 2021, to estimate the economic contribution of the Australian Cycling Economy in 2020 to Australia.

The results of EY's work, including the assumptions and qualifications made in preparing the report, are set out in EY's report dated 11 October 2021 ('Report'). The Report should be read in its entirety including the introductory chapters, the applicable scope of the work and any limitations. A reference to the Report includes any part of the Report. No further work has been undertaken by EY since the date of the Report to update it.

Our work commenced on 11 June 2021 and was completed on 11 October 2021. Therefore, our Report does not take account events or circumstances arising after 11 October 2021. No further work has been undertaken by EY since 11 October 2021 to update it.

EY has prepared the Report for the benefit of the Client and has considered only the interests of the Client. EY has not been engaged to act, and has not acted, as advisor to any other party. Accordingly, EY makes no representations as to the appropriateness, accuracy or completeness of the Report for any other party's purposes.

No reliance may be placed upon the Report or any of its contents by any party ("Third Parties") other than the Client. Any Third Party receiving a copy of the Report must make and rely on their own enquiries in relation to the issues to which the Report relates, the contents of the Report and all matters arising from or relating to or in any way connected with the Report or its contents.

EY have consented to the report being released publicly. EY disclaims all responsibility to any Third Parties for any loss or liability that the Third Parties may suffer or incur arising from or relating to or in any way connected with the contents of the Report, the provision of the Report to the Third Parties or the reliance upon the Report by the Third Parties.

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No claim or demand or any actions or proceedings may be brought against EY arising from or connected with the contents of the Report or the provision of the Report to the Third Parties. EY will be released and forever discharged from any such claims, demands, actions or proceedings.

In preparing this Report we have considered and relied upon information from a range of sources believed to be reliable and accurate. We have not been notified that any information supplied to us, or obtained from public sources, was false or that any material information has been withheld from us. Neither EY nor any member or employee thereof undertakes responsibility in any way whatsoever to any person in respect of errors in this Report arising from incorrect or incomplete information provided by the Participant Survey or other information sources used.

We do not imply and it should not be construed that we have verified any of the information provided to us, or that our enquiries could have identified any matter that a more extensive examination might disclose.

Our conclusions are based, in part, on the assumptions stated and on information provided by the Client and other information sources used during the course of the engagement. The modelled outcomes are contingent on the collection of information and assumptions as agreed with the Client and no consideration of other market events, announcements or other changing circumstances are reflected in this Report.

We highlight that our analysis and Report do not constitute investment advice or a recommendation to you on a future course.



Executive summary

Estimating the size and scope of the Australian Cycling Economy in 2020 (this Study) represents the first time Governments, wholesalers, retailers and bicycle related organisations gain an insight into the contribution of the Australian Cycling Economy.

The Australian Cycling Economy (“cycling economy” or “industry”) engages with a broad range of participants, with an estimated one in three Australian adult’s spending on cycling related goods or services in 2020.¹

Cyclists can engage in the industry as a means of sport and recreation, but also as a mode of transport to work or other commitments and as part of their tourism activities.

As this is the first time a study of this nature has been undertaken for cycling in Australia, it provides a unique insight into the cycling industry and its estimated contribution to the Australian economy.

The Australian Cycling Economy as defined for this Study includes expenditure of participants on items such as new bicycles, accessories & equipment, servicing, bike hire, merchandise and media & subscriptions. It also includes local and state government expenditure on bicycle infrastructure and programs, bicycle organisation spend and private sector spend on logistics and end of trip facilities.

Growing cycling engagement and participation in the industry relies heavily on the built environment, including active transport infrastructure, but also the programs and safety initiatives that exist to support the industry.

Whilst this Study focuses on the economic contribution of the industry, it is recognised that the physical activity benefits of cycling participation support broader health & wellbeing, social and productivity benefits to the Australian economy.

Cycling as a mode of transport can also benefit local communities through reducing road congestion and providing a sustainable transport option.

Estimates included in this Study do not include quantification of these important broader benefits. There is potential that these benefits are material and the cycling industry would benefit from their quantification within the scope of future studies.

In 2020, the Australian Cycling Economy is estimated to have directly contributed:

\$6.3b

direct industry output

Including...

\$3.4b

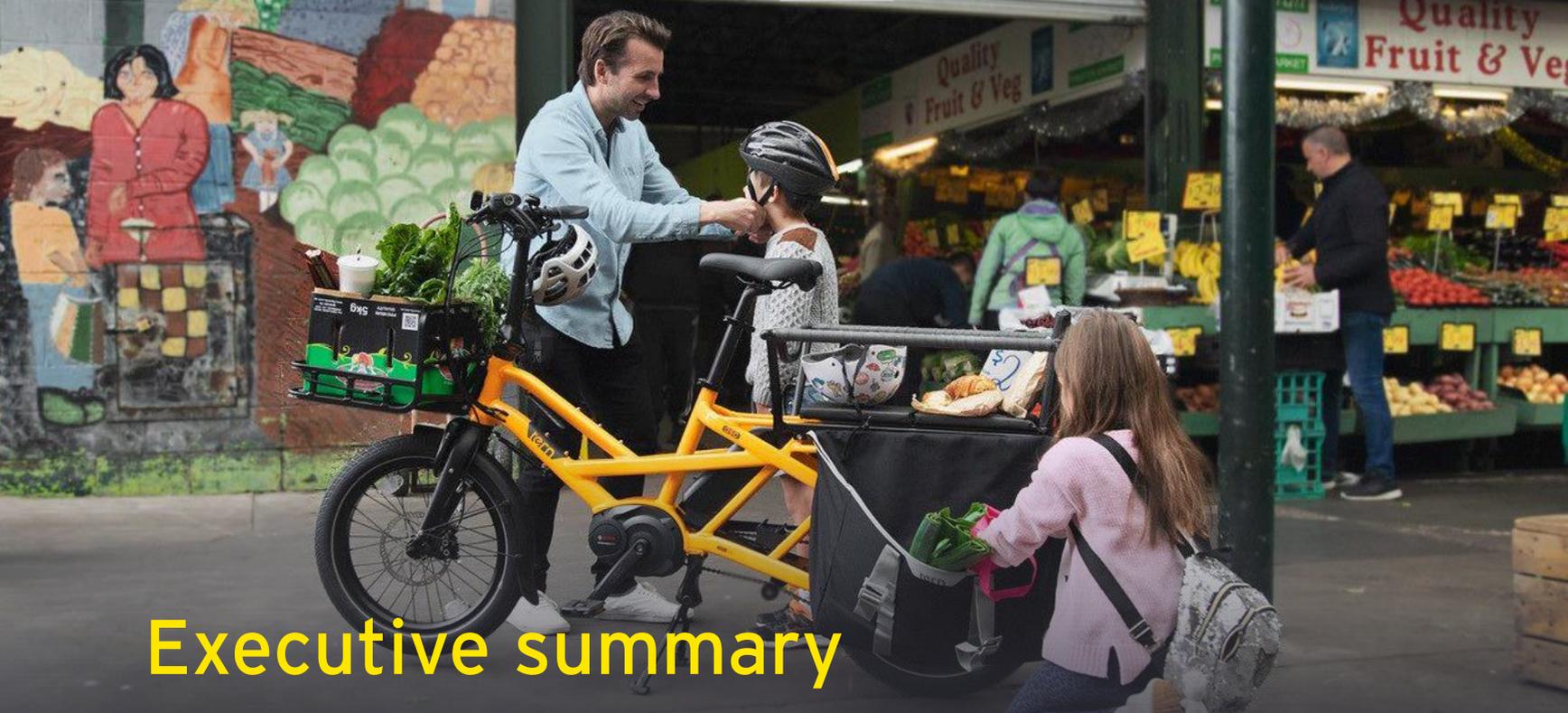
direct value add

Supporting...

34,295

direct jobs (FTE)

¹ The Adult population assessed as part of this Study includes Australians aged between 18 to 90.



Executive summary

This Study estimated that in 2020:

5.8m

Estimated number of Australian adults who spent money on cycling related goods or services. This equates to 29% of adults aged between 18 and 90.

3.3m

Estimated number of adults that spent money on cycling and cycled at least once per week.

\$990

Average annual spend on cycling related goods and/or service (spenders only).

1.7m

Estimated number of bicycles purchased in Australia.

28%

Percentage of bicycles purchased that were children's bikes.

\$900

Average retail cost of bicycles purchased in Australia.

43%

Percentage increase in annual spend between adults that cycle at least once per week compared to other spenders (i.e. those cycling at least once per fortnight or less).

\$118m

Estimated increase in annual expenditure if cyclists who indicated they would ride more frequently as a result of improving bikeways in urban areas moved from cycling at least once per fortnight to at least once per week.

\$428m

Estimated state/territory and local government investment in bicycle related infrastructure and programs.

Introduction

Estimating the size and scope of the Australian Cycling Economy in 2020 (this Study) represents the first time Governments, wholesalers, retailers and bicycle related organisations gain an insight into the contribution of the Australian Cycling Economy.

The Australian Cycling Economy (“Cycling economy” or “Industry”) is large and diverse, engaging with a broad participant base and generating expenditure that spans across a number of sectors. It is estimated that over 1 in 3 adult Australian’s spent money on cycling related goods or services in 2020.

Cyclists can engage in the industry as a means of sport & recreation, but also as a mode of transport to work or other commitments and as part of their tourism activities.

Growing cycling engagement and participation relies heavily on the built environment, including active transport infrastructure, but also the programs and safety initiatives that exist to support the industry.

As this is the first time a study of this nature has been undertaken for cycling in Australia, it provides a unique insight into the cycling industry and its contribution to the Australian economy.

Whilst this Study focuses on the economic contribution of the industry in 2020, it is recognised that the physical activity benefits of cycling participation support broader health & wellbeing, social and productivity benefits to the Australian economy.

Cycling as a mode of transport can also benefit local communities through reducing road congestion and providing a sustainable transport option.

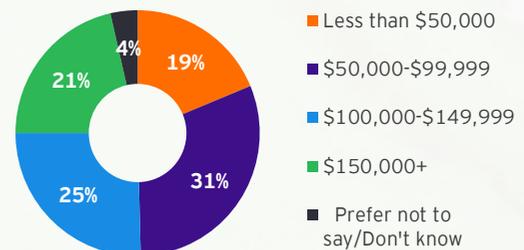
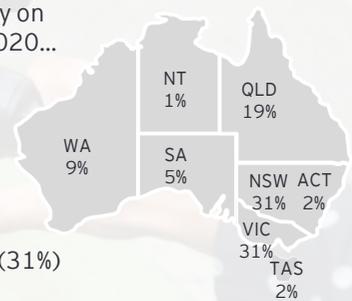
Estimates included in this Study do not include quantification of these important broader benefits. There is potentially for these benefits to be material and the cycling industry would benefit from quantifying these benefits within the scope of future studies.

Figure 1: Cycling consumer expenditure survey demographics¹

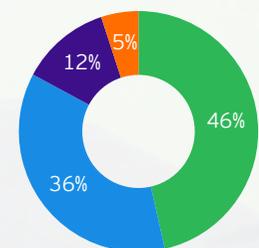
29% of Australian adults spent money on cycling in 2020...

... with NSW and VIC containing the highest number of cycling consumers.

The majority of consumers (31%) are within the \$50k - \$99k income bracket.



The majority of people that spend on cycling are aged between 18-34 and over 36% of consumers are aged between 35-49.



Approximately 53% of those who spend on cycling identified as male and 47% identified as female.³

Age range:
 ■ 18-34 ■ 35-49 ■ 50-64 ■ 65+²

¹ Based on the results of Participant Survey Study

² Maximum age range of 90 years of age

³ 0.2% of respondents identified as ‘other’.

Methodology

EY has taken the following approach to estimate the economic contribution of the Australian Cycling Economy:

1. Defining the boundaries of the cycling economy:

The Australian Cycling Economy was defined by EY through consultations with We Ride Australia (WeRide) and cycling stakeholders. The inflows and outflows of expenditure and revenue of each element of the sector were mapped in order to capture all aspects of the industry, whilst avoiding double counting. Purchases via international online platforms were excluded from estimates. Further details of how the cycling industry was defined are provided in the diagram over the page.

2. Data gathering

EY collected a combination of primary and secondary data from the following sources to estimate the economic contribution of the industry:

Cycling consumer

To understand the proportion of the population that spent on cycling and their cycling expenditure habits, an online survey was conducted by EY Sweeney:

- ▶ The survey was distributed to n=3,840 adult Australians in August 2021, of these 1371 qualified for the survey and 1200 completed the survey. Qualification was restricted to those who have spent money on cycling or related activities between 2019 and 2021. 1125 respondents spent money on cycling in 2020.
- ▶ The survey had a maximum margin of error of $\pm 4.6\%$ at the 95% level of confidence. This means that we can be 95% confident that survey estimates will be reflective of the total population to within $\pm 4.6\%$.
- ▶ All population data was weighted according to the proportions of age, gender and location specified in accordance with the Australian Bureau of Statistics (ABS).
- ▶ The Survey was also distributed to the AusCycling member base, with data used to inform this Study.

Governments, public sector and private organisations

EY and WeRide identified a range of cycling industry stakeholders (government, private sector and not for profit organisations) who were approached to provide expenditure and revenue data related to cycling. Consultations were held following the receipt of data to provide further clarity on the information provided.

Where primary data was not available, desktop research was undertaken to inform assumptions. A list of public data sources used as part of the analysis is provided in Appendix A.

3. Economic modelling

Direct impact:

The direct impact was calculated based on the expenditures of the components of the cycling economy captured in the data gathering stage. The inflows and outflows of expenditure and revenue of each element of the sector was mapped in order to avoid double counting.

Indirect impact:

To estimate the indirect expenditure, value-add (direct and indirect) and employment (direct and indirect) impact, EY conducted an Input-Output (IO) multiplier analysis. IO multipliers were supplied by REMPLAN.

Limitations

The following limitations should be considered:

- ▶ While effort has been made to include all areas of the cycling economy in estimating the economic contribution, there are areas of the economy that have not been included in this analysis due to an inability to access sufficient data at this time. Where data gaps occurred, where possible, data was extrapolated against relevant population assumptions.
- ▶ A key consideration in the analysis and extrapolation of data is the interconnected nature of industry elements in the supply chain. While effort has been made to avoid the double counting of sales/expenditure, there may be discrepancies in the data provided.
- ▶ Consultation with certain data providers were held to determine the factuality of data provided for this Study. However, EY did not validate the accuracy of all data provided through the data gathering process.
- ▶ In instances where data was not provided, data was assessed from prior years and extrapolated to the relevant year based on assumptions.
- ▶ This Study includes both non-electric bicycles, electric bicycles, bike rentals and indoor / stationary cycling. It does not include scooters, skateboards or related equipment.
- ▶ The scope of this Project focused on estimating the contribution of the cycling economy to Australia. We have provided an indicative breakdown by state and territory using a top down cycling population approach as an indication only i.e. the allocation of overall participant contributions to state and territories is based on the relevant cycling population in each state and territory.

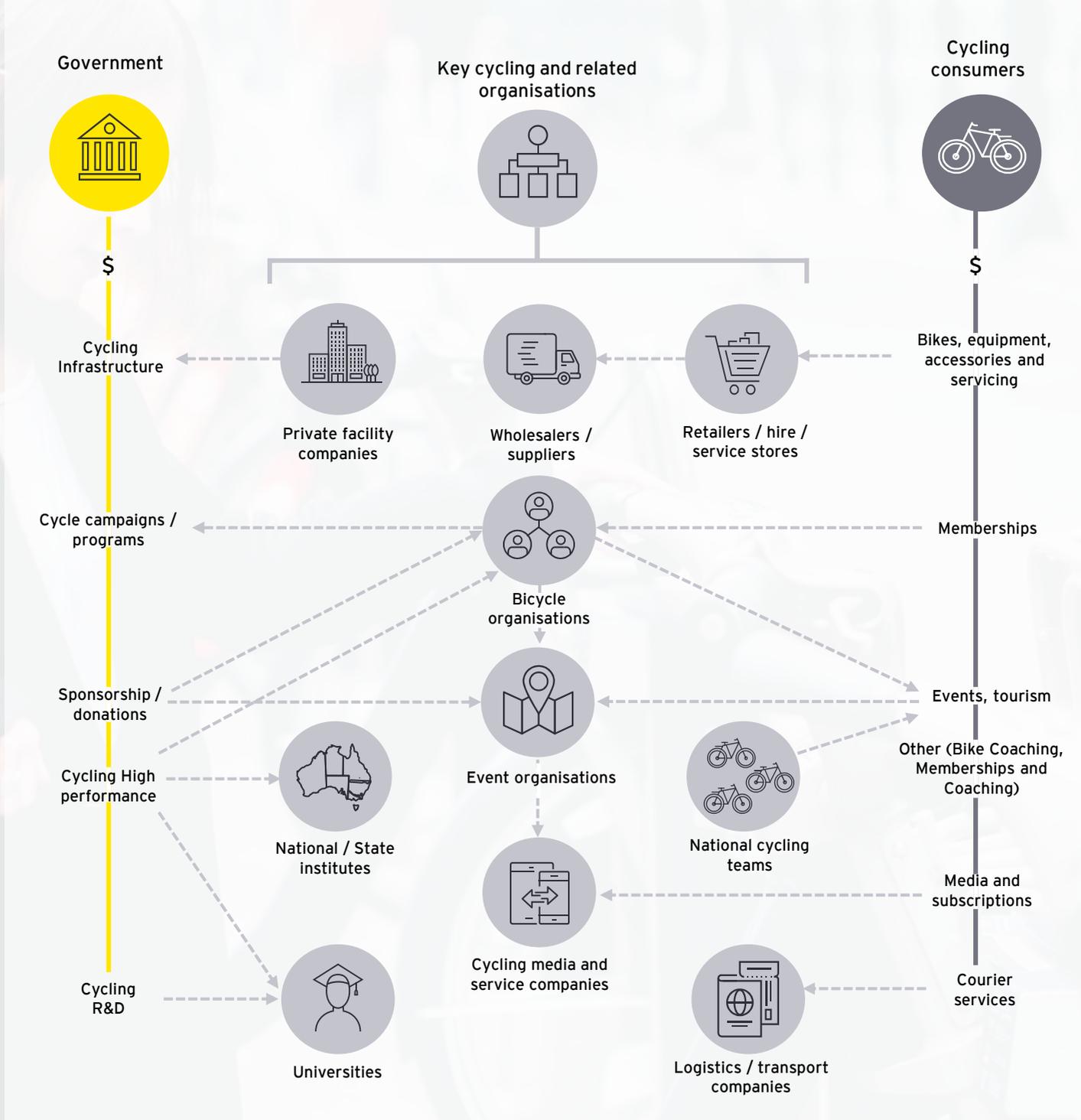
Defining the Australian Cycling Economy

The Australian Cycling Economy has a number of interrelated components that flow through the economy including expenditure of cycling consumers, Governments, the public sector and the private sector.

To capture the expenditure of the cycling economy in Australia, this Study first defined the boundaries of the industry. This was achieved through mapping the high level revenue and expenditure flows of each component of the industry. This was conducted in consultation with We Ride Australia and other cycling stakeholders.

The components of the industry that have been assessed as part of this Study are outlined in the diagram below.

Figure 2: High Level Cycling Economy Expenditure Map



Results



The Australian Cycling Economy is estimated to have directly contributed \$6.3b direct industry output, including \$3.4b direct value added, in 2020.

Direct Contribution

The direct contribution of the Australian Cycling Economy reflects the economic activity directly generated by all elements of the cycling industry, including activity generated by cycling participants, bicycle organisations, events, universities, national cycling teams and local & state governments.

In 2020, the Australian Cycling Economy is estimated to have directly generated \$6.3b direct gross output and \$3.4b direct value add.

Direct contribution or "Gross Output" is the market value of goods and services (i.e. gross revenue) produced by each segment of the cycling industry, after accounting for intra-industry sales (to avoid double counting).

Value Add is the market value of goods and services produced by the cycling industry, after deducting the cost of goods and services used. That is, Value Add is a subset of Gross Output and represents the marginal/additional economic value generated by the cycling industry. As such, direct value add is commonly put forward as the most appropriate measure of the relative contribution of an industry to the economy.

Total Contribution (direct and indirect)

The direct economic contribution of the Australian Cycling Economy also generates 'flow on' effects to other industries, including supplier demand for intermediate goods and services and additional consumption by people employed in the cycling economy. This is called the indirect contribution.

For example, money spent at bike retailers by consumers is allocated between material inputs (such as bike parts), wages and profits of the retailers. Wages spent by the employees of the bike retailer (for example, on household items) circulates the money throughout a broader economy creating indirect benefits. This includes flow on expenditure on cycling and non-cycling related items.

After estimating the indirect contribution using input-output multipliers, the cycling industry generated a total economic contribution (direct and indirect) in 2020 of (see Figure 3):

- ▶ \$16.8b Total Gross Output
- ▶ \$8.5b Total Value add.

Figure 3: Economic Contribution breakdown (2020)

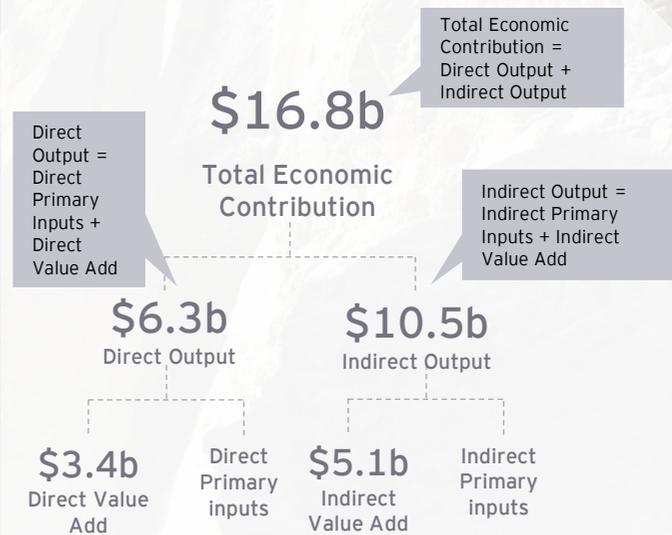


Figure 4: Value Add Summary (2020)



The Australian Cycling Economy supports a broad range of employment opportunities across the Australian economy.

Employment (Direct and Indirect)

In 2020, it is estimated that the Australian Cycling Economy expenditure generated 62,330 jobs (full time equivalent), including:

- ▶ **34,295 direct jobs**

This represents the people employed as a direct result of the \$6.3bn direct output generated by the cycling economy in 2020.

- ▶ **28,035 indirect jobs**

This represents employment from the 'flow on' effects to other industries, including employment supported by expenditure relating to supplier demand for intermediate good and services and additional consumption by people employed in the industry.

Figure 5: Direct, Indirect and Employment (FTE)



Impact of the COVID-19 Pandemic¹

The COVID-19 pandemic and subsequent movement restrictions have impacted the cycling economy in a unique way. Whilst many cycling industry shopfronts and tourism providers were negatively impacted by social restrictions, the overall demand for bikes has increased materially. Between FY19 and FY21, total number of bicycle imports increased 46% from approximately 1.2 million to 1.7 million.²

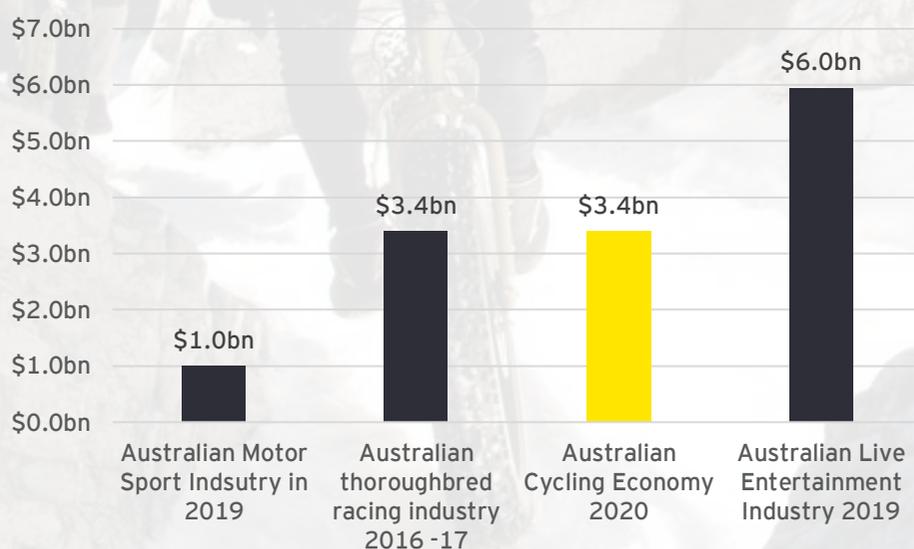
This increased demand for bike purchases in 2020 is reflected in contribution estimates, offset to an extent by the capacity of participants to spend on things like tourism and events which have been negatively impacted by social restrictions.

Whilst the future spend profile of cyclists is unknown, 50% of participants surveyed indicated that they would increase their frequency of riding and 61% indicated they would increase their cycling related expenditure in the future. The outcomes of this Study indicate the more people cycle, the more they spend (refer to page 10), so there is potential that whilst the demand for new bikes may diminish, participants using these bikes more frequently may spend more in other categories (e.g. servicing, apparel etc.).

Cycling Economy comparison

As the cycling industry is unique, it is difficult to compare the contribution of the industry to similar industries. While cycling is a mode of transport and could be considered a sport and recreation industry, it could also be considered a tourism and event industry. The graph below outlines the contribution estimates of other sport / entertainment industries in Australia to provide a comparison of the relative size of the cycling economy.

Graph 1: Direct Value Add Industry Comparison³



¹ Note that this Study did not directly assess the impact of COVID-19 on the Australian Cycling Economy

² Bicycle Industries Australia, Bicycle Import Data 2021

³ Inflated to 2020 AUD dollar values. Sources provided in Appendix A.

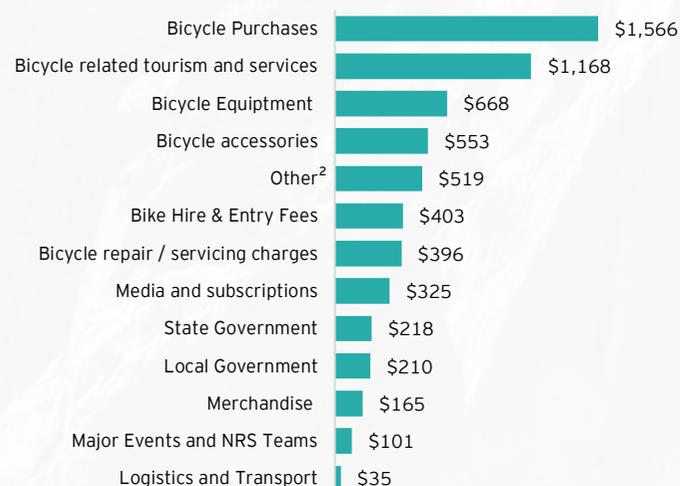
Breakdown of estimated contribution by category

The breakdown of total estimated direct expenditure (\$6.3b) across the cycling economy in 2020 is presented in Graph 2.

Bicycle purchases is the largest component of expenditure in the industry in 2020 estimated at \$1.6b, this equates to approximately 1.7m bikes purchased in 2020. Bicycle related tourism and services was the second highest component of direct expenditure at \$1.2b.

Based on available data, it is estimated that State and Local Governments across Australia spent approximately \$428m on cycling related infrastructure and programs to advocate and promote cycling in their regions. Given a significant proportion of cycling related infrastructure spend occurs within larger transport projects, there is a potential that this is a conservative estimate. Further work to decouple this expenditure would provide a clearer view on the industries contribution, however this was outside the scope of this Study.

Graph 2: In-scope direct expenditure per component – 2020 (\$m)¹

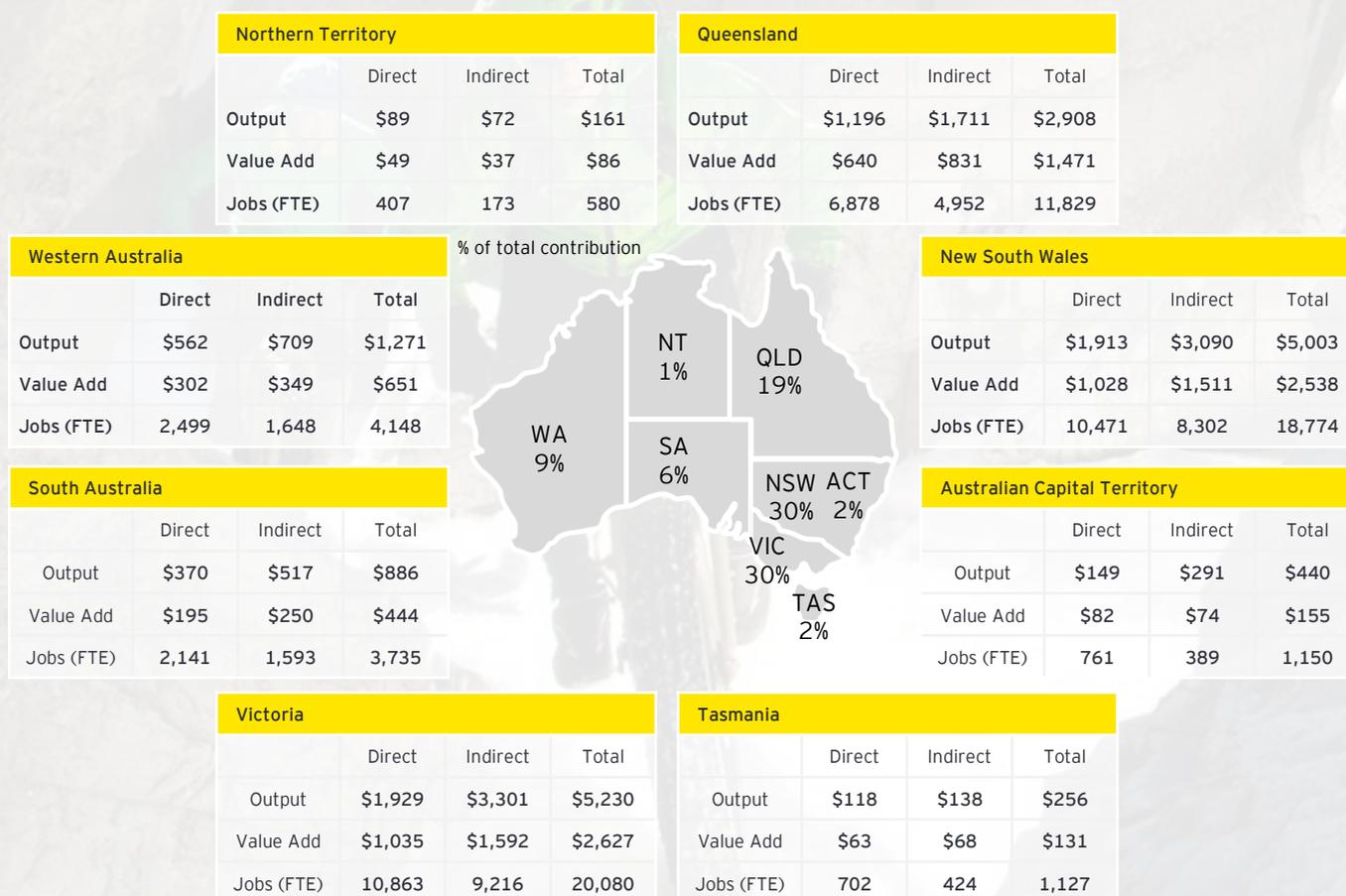


Both Victoria and the ACT populations engage in cycling at a greater rate when compared to other states and territories, contributing to their state/territory estimate.

An estimated 34% of Victorian and 43% of ACT residents spent money on cycling in 2020, compared to the national average of 29%.

Victoria and New South Wales accounted for the highest proportion of economic contribution. Victoria contributed an estimated \$1.93b in direct output (equivalent to \$290 per capita) and New South Wales contributing \$1.91b in direct output (equivalent to \$235 per capita). It is also worth noting that ACT has a high per capita spend of \$350 reflecting a high level of engagement in the cycling economy.

Figure 6: Economic contribution per State – 2020 (\$m)³



¹Note: Where necessary, component revenue / expenditure has been adjusted to avoided double counting

²Other includes Bike Coaching, Memberships and Insurance and in-scope bicycle organisation & university expenditure

³Economic contribution (direct and indirect) estimates used state / territory multipliers and will therefore not sum to Australian estimates.

The Australian cyclist

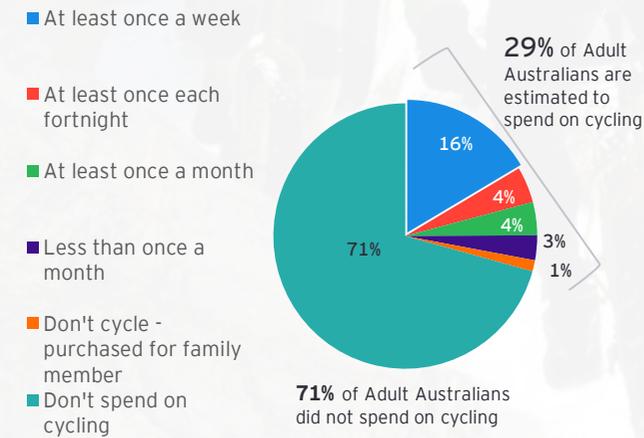
This study profiled Australian cycling consumers to understand their cycling behaviours and preferences. It found:

- ▶ The cycling consumer is diverse and engages in the industry as a means of sport and recreation, but also as a mode of transport to work or other commitments and as part of their tourism activities.
- ▶ **Fitness** was the primary motivating factor for cycling amongst the adult population in 2020 with socialising and connection another key motivating factor.
- ▶ The **most popular form of cycling is recreational road cycling**, with 69% of those who cycle at least once a month noting that they engage in recreational road cycling.
- ▶ **Metropolitan riders more likely to spend more frequently** on bicycles than those living in regional areas. Four in ten (42%) metro riders have spent money related to bicycle riding in the last month compared with three in ten (27%) regional riders. Metro (48%) riders were also more likely to expect an increase in their bicycle related spending compared to regional (38%) riders.
- ▶ **While online cycling related purchasing is common, there is a continued role for in-store shopping**, with the vast majority of cycling consumers purchasing equipment (72%) and/or accessories (67%) both online and in-store, very few opting for online only shopping (both 3%). In contrast, three in ten (30%) purchased bicycle equipment and one in four (25%) purchased bicycle accessories purely in-store.

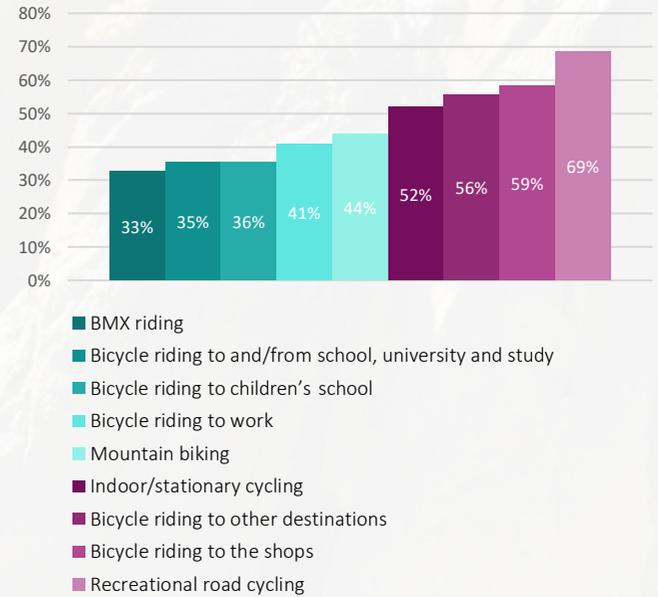


5.8m adults spent money on cycling in Australia in 2020

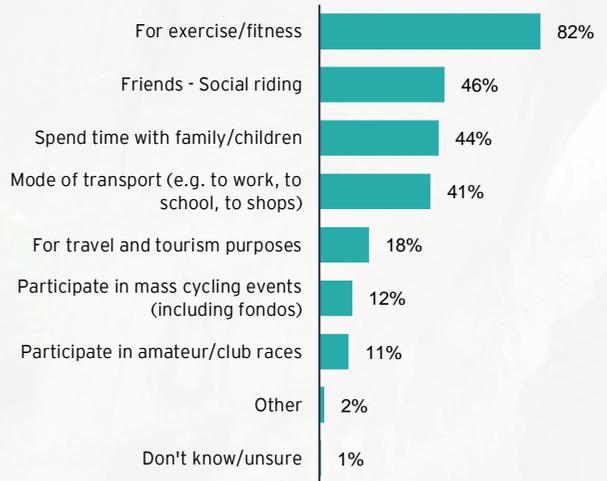
Graph 3: Breakdown of frequency of cycling in 2020



Graph 4: Level (%) of engagement in types of cycling at least once per month (proportion of total spenders)



Graph 5: Cyclists who cycle at least once a month – type of cycling activity



Cycling consumer expenditure breakdown

As highlighted on Graph 3 on the previous page, an estimated 29% of the Australian adult population spent money on cycling related goods or services in 2020. This includes those that cycle at least once a week and non-cyclists who likely bought for a child or as a present.

There are multiple ways that cyclists spend in the cycling economy, including through the purchase of new bikes or equipment, bike hire, bicycle related tourism, merchandise and/or bike coaching (see Figure 8).

There appears to be a direct link between cycling frequency and expenditure profiles:

- ▶ Cyclists who rode at least once a week, spent on average 43% more on cycling related items than other participants, and just over 25% more than participants who cycled at least once a fortnight.
- ▶ Almost 85% of total consumer spending was generated by those that cycle at least once a fortnight.

In terms of cycling expenditure categories, the majority (71%) of consumers spent on bicycle accessories and over half (59%) spent on bicycle equipment.

Bicycle purchases

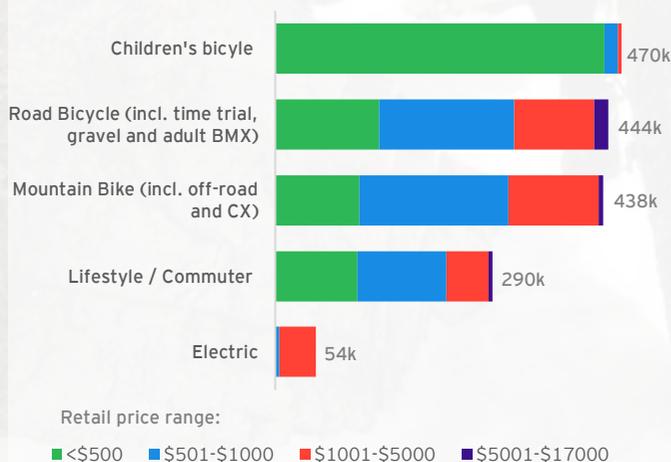
Bicycle purchases represented the largest expenditure category, with an estimated 1.5 million consumers purchasing approximately 1.7 million bicycles in 2020. The average retail cost of bicycles purchased in Australia was \$900.

Estimates are materially consistent with the Bicycle Industries Australia 2020 calendar year import data (1.4 million bikes) and the industry assumption that there are approximately 300k bicycles in stock in shops and warehouses. The impact of COVID-19 saw a material increase demand for bikes, with financial year 2021 imports increasing to 1.75 million.



**1.7m
Bicycles sold
in Australia in 2020**

Graph 6: 2020 estimated bicycle purchases by category and retail price range



Graph 7: Estimated average annual spend by cycling frequency

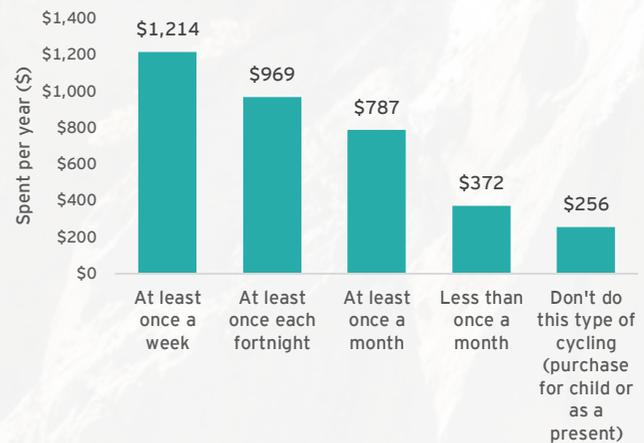
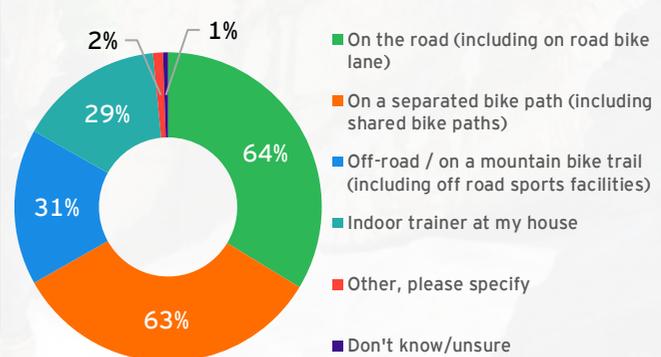


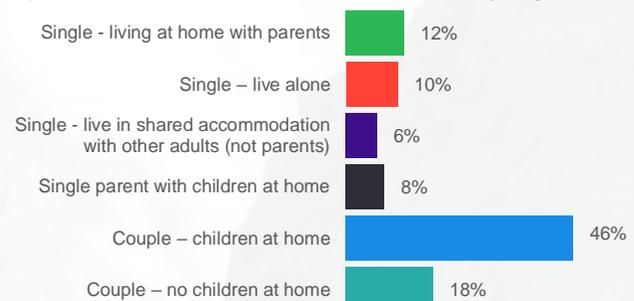
Figure 8: Estimated average annual spend category and incidence for those that spent money in the category

Expenditure categories	Avg. Spend(\$) ¹	Incidence of spend (%)
Bicycle purchases	\$1,066	25%
Bicycle equipment	\$194	59%
Bicycle accessories	\$133	71%
Bicycle repair/servicing charges	\$150	45%
Bike Hire & Entry Fees	\$283	24%
Merchandise	\$187	15%
Cycling related media and subscriptions	\$480	13%
Bicycle related tourism and services	\$1,044	19%
Other ²	\$220	39%

Graph 8: Where people predominately cycle



Graph 9: Household status of those who spend on cycling



¹ Average spend of spenders only

² Other includes Bike Coaching, Memberships and Insurance)

Barriers to cycling

This Study also asked Australians on their barriers to cycling. It found:

- ▶ Improving bikeways in urban areas would have the highest impact on the propensity to cycle:
 - ▶ 55% of cyclists who currently cycle at least once per fortnight would cycle at least 2 additional trips if this barrier was addressed, indicating they would cycle an additional 4.0 trips per month on average.
 - ▶ 62% of cyclists who currently cycle at least once per month would cycle more frequently if this barrier was addressed, indicating they would cycle an additional 4.3 trips per month on average.
 - ▶ Based on above and the difference between expenditure profiles estimated as part of this Study, it is estimated that:
 - ▶ If cyclists moved from cycling at least once per fortnight to at least once per week as a result of improving bikeways in urban areas, total expenditure could increase by \$118 million annually, equating to \$245 per cyclist.
 - ▶ If cyclists moved from cycling at least monthly to at least once per fortnight as a result of improving bikeways in urban areas, total expenditure could increase by \$90 million annually, equating to \$182 per cyclist.
 - ▶ An estimated 69% of Australian cycling consumers would be encouraged to ride more if there was an increased feeling of safety while riding with motor traffic. An estimated 60% would be encouraged to cycle further if there were fewer heavy vehicles on the road when they cycle.

Figure 9: Number of additional trips per month that would be taken, for cyclists who currently cycle at least once per fortnight and once per month, if barriers are addressed

Cycling initiative	Cycling Frequency - At least once each fortnight		Cycling Frequency - At least once each month	
	% of cyclists that would take at least 2 additional trips ²	Additional trips / month (avg.) ¹	% of cyclists that would take at least 1 additional trip ³	Additional trips / month (avg.) ¹
Bikeways in urban areas	55%	4.0	62%	4.3
More dedicated off-road bicycle and rail trails	51%	4.3	57%	4.1
Better connected separated bike paths to transport hubs or activity hubs	51%	3.9	56%	4.0
If heavy vehicles were removed from urban areas	43%	5.0	34%	4.7
Financial incentives to purchase bicycles for commuting (i.e. tax incentives)	37%	5.7	38%	5.2
Lower speed limits were in place on local streets	38%	4.0	32%	4.3
Better facilities on PT or at major PT stations/hubs (e.g. storage or parking) for my bike	35%	4.3	38%	4.6
Greater investment in mountain bike parks at Australian holiday destinations	24%	2.8	34%	2.7

¹ Average trips per cyclist who indicated they would cycle more frequently with outliers removed - outliers defined as those with more than 30 extra trips per month

² Assumes cyclist in this category would need to cycle at least twice more per month to move cycling frequency profiles

³ Assumes cyclist in this category would need to cycle at least once more per month to move cycling frequency profiles

Appendix



Appendix A: Data sources

The table below lists the secondary data sources referenced in the Report and used in the estimation of the economic contribution.

Research	Year of research	Assumption / Application
Australian Bureau of Statistics – <i>Household and Family Projections, Australia</i> , Released: 14.03.2019	2019	Household and family projections for Australia, states and territories and capital cities in 2020
Australian Bureau of Statistics – <i>National, state and territory population Dec 2020</i> , Released: 17.06.21	2019	Estimated resident population, by age and sex
Australian Bureau of Statistics – <i>Regional Statistics by LGA 2020</i> , Data extracted: 27.09.2021	2021	Local Government Authority (LGA) populations in 2020
Australian Bureau of Statistics – <i>Household and Family Projections, Australia</i> , Released: 14.03.2019	2019	Household and family projections (based on different assumptions of living arrangements) for Australia, states and territories and capital cities in 2020
Griffith University (Cities Research Institute), Department of Transport and Main Roads) – <i>Innovative Cycling Infrastructure Funding Models and their potential in Queensland (Table 19)</i>	2019	Share of cycle infrastructure funding by LGA in Queensland Transport and Roads Investment Program 2018-2022
Australian Bicycle Council, <i>National Cycling Strategy: Implementation Report 2016</i>	2016	State & Territory Cycling Investment 2010-2016
EY, <i>The economic contribution of the global Motor Sport industry in 2019</i> , Federation Internationale de l'Automobile (FIA)	2021	Industry Comparison Australian motor sport industry economic contribution 2019
EY, <i>The economic contribution of Australia's Live Entertainment Industry - How has COVID-19 impacted the industry?</i>	2020	Industry Comparison Australian live entertainment industry economic contribution 2020
IER Consulting, <i>Thoroughbred Racing Nationally, 2016-17</i>	2018	Industry Comparison Australian thoroughbred racing industry 2016-2017

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