The Economic Impact of Women Bicyclists
Insight from the 2012 American Bicyclist Survey

FREE Women Bike Webinar | Wed, Feb 27 | 2 p.m. Eastern
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Women Mean Business: The Economic Impact of Women Bicyclists!

February 27, 2013

American Bicyclist Study Webinar
Produced by the Gluskin Townley Group LLC
For
The League of American Bicyclists
Today’s Presenters

**Jay Townley**  
Partner

Background:
- President, Browning Automatic Components
- President, Giant Bicycle USA
- Executive Director, The Bicycle Council
- VP/Assistant to the President, Schwinn Bicycle Company
- International speaker on U.S. bicycle market trends

**Elliot Gluskin**  
Managing Partner

Background:
- Research Director, Rodale Cycling Group
- President, Media Research Directors Association
- Co-author of *Cycling Consumer of the New Millennium* report on the U.S. bicycle market
- Quoted source on cycling trends in Wall Street Journal, New York Times, Boston Globe, and other media
The Economic Impact of Women Bicyclists

Insight from the 2012 American Bicyclist Survey

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Webinar Agenda

1. The New American Bicycle Market
2. Current Economic Impact of Women
3. The Endemic Prejudice
4. “...demographics are destiny”
5. Future Economic Impact of Women
6. Questions
Women Mean Business: The Economic Impact of Women Bicyclists!

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The New American Bicycle Market

“...an America where Latinos, Asians, African Americans and women make up a broad demographic coalition.”

Bicycle Retailer And Industry News
Staff Editorial December 1, 2012 Print Issue

And Add Young People!
The New American Bicycle Market

2011

Total 2011 U.S. Bicycle Riding Participants = 39,567,000

13% Percent of Total U.S. Population

Source: National Sporting Goods Association (NSGA)
The New American Bicycle Market

2011

Adult Bicycle Riding Participants = 24,927,201

63% Percent of Bicycle Riding Participants

8% Percent of Total U.S. Population

Source: National Sporting Goods Association (NSGA) and Gluskin Townley Group Analysis
The New American Bicycle Market

2011

Adult Male Bicycle Riding Participants = 13,460,693

34% Percent of U.S. Bicycle Riding Participants

54% Percent of U.S. Adult Bicycle Riding Participants

4% Percent of Total U.S. Population

Source: National Sporting Goods Association (NSGA) and Gluskin Townley Group Analysis
The New American Bicycle Market

2011

Adult Female Bicycle Riding Participants = 11,466,517

29% Percent of U.S. Bicycle Riding Participants

46% Percent of U.S. Adult Bicycle Riding

4% Percent of U.S. Population

Source: National Sporting Goods Association (NSGA) and Gluskin Townley Group Analysis
The New American Bicycle Market

2011
American Bicyclist Study

U.S. Adults who currently own any bicycle that they purchased either new or used =

25,352,000
8% of U.S. Population

Source: Gluskin Townley Group American Bicyclist Study
The New American Bicycle Market

2011 American Bicyclist Study

U.S. Adults Women who currently own any bicycle that they purchased either new or used =

12,389,000

4% of U.S. Population

Source: Gluskin Townley Group American Bicyclist Study
The New American Bicycle Market

- Women Are The New Majority

BBC News 7 November 2012
The largest generation of Americans in history with 100 million strong by 2022!

Currently in control of the U.S. marketplace for bicycles!

Enabled the U.S. Bicycle Industry to grow, influenced the Bike Boom of 1972-1975

<table>
<thead>
<tr>
<th>Generation Y</th>
<th>Generation X</th>
<th>Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>61%</td>
<td>44%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.
The consumer group with the most influence on the Specialty Bicycle Retail Channel

<table>
<thead>
<tr>
<th></th>
<th>Enthusiasts</th>
<th>Moving Ups</th>
<th>Casuasls</th>
<th>Infrequent</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>21%</td>
<td>49%</td>
<td>40%</td>
<td>60%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The consumer group with the most influence on the Specialty Bicycle Retail Channel

Closely aligned with Enthusiasts but ride less, spend less, and visit bike shops less

Enjoy riding when they are able, look for good deals AND an excellent shopping experience. Might consider IBD if recommended by friend

Ride very infrequently due to family and time constraints, when shopping they go where they can get a good deal AND a good shopping experience

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.
New American Bicycle Market
Favored Retail Channels for Recent Bicycle Purchases

Percent of Adult Bicycle Owners Who Made Recent Bicycle Purchase

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.
<table>
<thead>
<tr>
<th>Race</th>
<th>2000</th>
<th>2010</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>75%</td>
<td>72%</td>
<td>5.7%</td>
</tr>
<tr>
<td>Hispanic / Latino</td>
<td>12.5%</td>
<td>16%</td>
<td>43.0%</td>
</tr>
<tr>
<td>African American</td>
<td>12%</td>
<td>13%</td>
<td>12.3%</td>
</tr>
<tr>
<td>Asian</td>
<td>4%</td>
<td>5%</td>
<td>43.3%</td>
</tr>
</tbody>
</table>
Retail Channel Where Most Recently Bought New/Used Bicycle by Race/Ethnicity

- Bike shop: 87%
- Discount store: 84%
- Sporting goods retailer: 79%
- Specially outdoor retailer: 78%
- Online retailer: 76%

Legend:
- White
- Black
- Asian
- Hispanic
- Other
# The New American Bicycle Market

## Young People!

<table>
<thead>
<tr>
<th></th>
<th>Baby Boomers</th>
<th>Generation X</th>
<th>Generation Y</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Year Born</strong></td>
<td>1945 To 1964</td>
<td>1965 To 1984</td>
<td>1985 To 2004</td>
</tr>
<tr>
<td><strong>Number of Americans</strong></td>
<td>78 Million</td>
<td>69 Million</td>
<td>100 Million</td>
</tr>
<tr>
<td><strong>Age Range</strong></td>
<td>68 to 49</td>
<td>48 to 29</td>
<td>28 to 9</td>
</tr>
<tr>
<td><strong>Year</strong></td>
<td>2013 Now!</td>
<td>2016 In 4 years</td>
<td>2020 In 8 years</td>
</tr>
<tr>
<td></td>
<td>75 to 56</td>
<td>55 to 36</td>
<td>35 to 17</td>
</tr>
<tr>
<td><strong>Mean</strong></td>
<td>68</td>
<td>48</td>
<td>28</td>
</tr>
</tbody>
</table>

*Source: Deliver Magazine; The U.S. Postal Service; The Age Curve by Kenneth W. Gronbach*
Current Economic Impact of Women

2011

Women are estimated to have captured 37% of the total U.S. Bicycle Market of $6 billion in direct effect retail dollars, or $2.3 billion

Source: Gluskin Townley Group Analysis
Women Make Up a Potent Economic Force in Bicycling

Women 48%
Men 52%

Percent of Adult New Bicycle Buyers

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.
Women Make Up a Potent Economic Force in Bicycling

Percent of Adult Used Bicycle Buyers

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.
Women Make Up a Potent Economic Force in Bicycling

Women 41%

Men 59%

Percent of Adult Bicycle Owners Planning to Buy a New Bicycle

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.
Women Make Up a Potent Economic Force in Bicycling

Percent of Adult Bicycle Owners Planning to Buy a Used Bicycle

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.
Women Make Up a Potent Economic Force in Bicycling

Percent of Adult Bicycle Owners Planning to Buy Any Cycling Products Excluding Bicycles

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.
Women Make Up a Potent Economic Force in Bicycling

Of the $6.8 billion planned to spend on bicycles and related purchases, women may account for $3.50 of every $10 or $2.4 billion in spending!

...and it could be more...much more!!

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.
Where Women are Planning to Buy

Percent of Adult Bicycle Owners Planning to Buy From Key Retailers

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.
The Endemic Prejudice...that keeps the American Bicycle Movement from becoming great!
1. "I don't think of stepping into a store"
2. "I'm overwhelmed by bike stuff"
3. "Sales will be with me in a few minutes"
4. "I don't know how to choose/compare"
5. "What else do I need?"
6. "It doesn't seem like I belong"
7. "I don't know where to go"
8. "I don't understand the sales person"
9. "I don't want to test ride"
10. "What do I do with it now?"
Retail Experience

The Novice’s Problem Journey

Something challenging
Issues to address

Considerations for the store beyond the bike product
The big picture

When the “expert” sees a bike in a store, he/she automatically links it to all the other stuff that completes the experience. This comes from experience, product knowledge, exposure to bike marketing and his community of riders.
When a novice sees a bike in a store, they don’t have the knowledge, history or expertise to make those critical links between the bike and “everything else” — so usually, they just see a pretty challenging, hard-to-engage product. The easy connections aren’t there.
The big picture

We think the big opportunity lies in creating an experience that is inclusive of all the “components” of the bigger picture - and bringing it all in-store. If you don’t provide these things along with the product itself, you can’t connect to the novice user.
The Economic Impact of Women Bicyclists

“...demographics are destiny”
The Economic Impact of Women Bicyclists

“My message was really about the long haul, you know, demographics are destiny, and if you just ignore it, you do it at your peril.”

Jeb Bush, former Governor of Florida
The 11% Factor

U.S. Live Births 1935 to 2010

Live births

Source: U.S. Census Bureau

Generation X
Future Economic Impact of Women

- 2013 to 2020 – 7 years from now
- 2013 to 2023 – 10 years from now
- 2013 to 2028 – 15 year from now
## U.S. Adult Women Bicyclists
### 1990 compared to 2011
Percent of All Adult Female Cyclists and Percent of All Adult Females
(In Thousands)

<table>
<thead>
<tr>
<th>Segment</th>
<th>1990</th>
<th>2011</th>
<th>1990</th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% Adult Female Cyclists</td>
<td>% Adult Female Cyclists</td>
<td>% All Adult Women</td>
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</tr>
<tr>
<td>All Female Cyclists (18+)</td>
<td>16,592</td>
<td>100%</td>
<td>17%</td>
<td>12,389</td>
</tr>
<tr>
<td>Female Enthusiasts (18+)</td>
<td>202</td>
<td>1%</td>
<td>0.2%</td>
<td>743</td>
</tr>
<tr>
<td>Female Moving Ups (18+)</td>
<td>785</td>
<td>5%</td>
<td>1%</td>
<td>1,487</td>
</tr>
<tr>
<td>Female Casuals (18+)</td>
<td>3,098</td>
<td>19%</td>
<td>3%</td>
<td>2,354</td>
</tr>
<tr>
<td>Female Infrequents (18+)</td>
<td>12,507</td>
<td>75%</td>
<td>13%</td>
<td>7,805</td>
</tr>
<tr>
<td>All U.S. Women (age 18+)</td>
<td>96,322</td>
<td>100%</td>
<td>118,893</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: Gluskin Townley Group American Bicyclist Study
## U.S. Adult Women Bicyclists
1990 compared to 2011
All Adult Female Cyclists as a Percent of All Adult Females
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Source: Gluskin Townley Group American Bicyclist Study
### U.S. Adult Women Bicyclists
Projected Increase in 2011 by 7 Percent to 1990 Level
(In Thousands)

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<td>100%</td>
<td>10%</td>
</tr>
<tr>
<td>Increase 2011 by 7%</td>
<td></td>
<td></td>
<td></td>
<td>8,616</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td>21,005</td>
<td></td>
<td>17%</td>
</tr>
<tr>
<td>2011 Est. Rev Bikes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$1.97 bil</td>
<td></td>
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<tr>
<td>7% Unit Increase =</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$1.29 bil</td>
<td></td>
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<tr>
<td>Projected Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$3.26 bil</td>
<td></td>
</tr>
</tbody>
</table>
Summary

1. The New American Bicycle Market
2. Current Economic Impact of Women
3. The Endemic Prejudice
4. “...demographics are destiny”
5. Future Economic Impact of Women
Women Mean Business: The Economic Impact of Women Bicyclists

QUESTIONS?
Call or email us!

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elliot@gluskintownleygroup.com

Jay Townley – 608.666.2062
jay@gluskintownleygroup.com

For more information, please visit our website:
www.gluskintownleygroup.com
Thank You!
Women Bike

3 Ways to Get Involved

1) Attend the National Women’s Bicycling Forum
   bikeleague.org/womenbike

2) Subscribe to our E-news
   bikeleague.org/womenbike

3) Join our community
   facebook.com/WomenBike
   @womenbike

Questions?
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(202) 621-5452