

THE U.S. BICYCLE MARKET
A Trend Overview



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Introduction

Over the last decade, bicycling has become less popular, but more visible. The bicycle market in the US is not growing, yet it has the potential to become far more profitable. What made this happen? Simple. While bicycling faded as a pastime, it grew as a sport.

This free report is the first in a series produced by Gluskin Townley Associates to show the bicycle industry where it stands and how to prosper. Our series focuses on adult frequent bicyclists, a relatively small group that dominates consumer spending as it pushes the growth of what devotees call “bike culture.” This report analyzes data from two national surveys and other sources to show how bicycle riding in the US changed between 2000 and 2010. The next report analyzes an exclusive survey of touring cyclists to profile this important segment of the frequent bicycling population. It is available for purchase at the end of this document.

Executive Summary

- **Bicycling is not for kids any more.** The number of children who ride bicycles declined more than 20 percent between 2000 and 2010, while the number of adults who ride increased slightly.
- **Enthusiasts are driving growth.** More than 21.8 million American adults rode a bicycle 109 days or less in 2010, about the same as the number who rode that often in 2000. But another 3.4 million rode in 110 days or more, and the number of frequent cyclists increased 12 percent over the decade.
- **Most women are less interested in bicycling...** About 10.2 million women rode 109 days or less in 2010, a decrease of 13 percent since 2000.
- **...but female enthusiasts are on the rise.** The number of women who rode 110 days or more exceeded 1.3 million and increased 8 percent during the decade. At the same time, the number of men who ride that frequently increased 15 percent.
- **Older riders ride more.** Participation in bicycling falls off after the age of 55, particularly among women, but male riders who belong to the enormous baby-boom generation show few signs of slowing down. In fact, riding days for men tend to increase after they reach age 65.
- **What do women want?** Bicycle retailers and suppliers should focus on retaining their loyal customers for as long as possible, but bicycle sales in the US will not grow until the industry finds ways to increase the appeal of bicycling to women. Some European countries have as many women bicyclists as men, and the difference may be in urban design.
- **Youth equals diversity.** Most of the children in America’s largest cities and states no longer have an Anglo-American cultural background. But more than 85 percent of bicycle riders are non-Hispanic and white. The future viability of the bicycle industry in the US depends on finding ways to appeal to black, Hispanic, and Asian families. This is why it is of critical importance to the industry to make urban and suburban areas safe and bicycle-friendly.

Bicycling Trends, 2000-2010

The number of Americans who ride a bicycle at least six times a year declined from 43.1 million in 2000 to 39.8 million in 2010. This represented an 8 percent decline even as the overall number

of Americans adults increased 10 percent, according to surveys conducted by the National Sporting Goods Association (NSGA). But the decline in bicycling did not happen evenly across the population. Participation actually increased in some groups. Studying those groups will help the industry find ways to grow.

Women and children fled from bicycling in the last decade, but men rode to the rescue. The number of children who ride a bicycle at least six times a year plummeted between 2000 and 2010, decreasing 21 percent even as the total number of children increased 3 percent. The overall number of adult bike riders increased 2 percent – a somewhat better performance, but still slower than the 12 percent overall increase in the number of adults. Among adults, the number of women riders decreased 10 percent, even as the overall number of women increased 12 percent. But the number of men who participated in bicycling increased 16 percent between 2000 and 2010. This was even faster than the 13 percent overall growth in the adult male population (see table 1).

Table 1: U.S. population and bicycle riding participants by age and sex, 2000 and 2010, in thousands

	2000	2010	Change	% Change
Total U.S. population	281,421	308,745	27,324	10%
Bicycle riders (6x+/yr)	43,135	39,789	-3,346	-8%
Percent of U.S. population	15%	13%		
Total child population (0-17)	72,293	74,181	1,888	3%
Child bike riders (7-17)	18,509	14,587	-3,922	-21%
Percent of all children	25%	20%		
Percent of all bike riders	43%	37%		
Total adult population (18+)	209,128	234,564	25,436	12%
Adult bike riders	24,626	25,202	576	2%
Percent of adult population	12%	11%		
Percent of all bike riders	57%	63%		
Total adult male population	100,996	113,836	12,840	13%
Adult male bike riders	11,742	13,589	1,847	16%
Percent of all adult males	12%	12%		
Percent of adult bike riders	48%	54%		
Total adult female population	108,133	120,728	12,595	12%
Adult female bike riders	12,884	11,608	-1,276	-10%
Percent of all adult females	12%	10%		
Percent of adult bike riders	52%	46%		

Sources: Census Bureau and National Sporting Goods Association Sports Participation Study, 2010 & 2000

As the cycling universe shrank around the edges, its core got harder. Over the last decade, the industry has benefitted from rapid growth in groups that promote “bicycle culture,” which integrates bicycling into daily patterns of work and play. Groups like the Rails to Trails

Association have become effective advocates for cycle touring, while the International Mountain Bike Association and other groups are giving people better ways to plug into performance-oriented cycling. Meanwhile, urban activists have formed organizations in virtually every metropolitan area in the US, such as Transportation Alternatives in New York City, to promote bicycling as a form of daily transportation and exercise.

These groups have re-defined American bicyclists as a special interest group. They are the main reason why the numbers of American adults who ride a bicycle at least 110 days a year increased 12 percent during the decade, even as the total number of adult riders was essentially flat (see table 2). And in a particularly important finding, women appear to be sharing in the growth of bicycling culture. The number of women who ride frequently increased by more than 100,000 between 2000 and 2010, even as the total number of women riders decreased by almost 1.3 million.

Table 2: Bicycle riding participants and frequent participants who ride at least 110 days a year in thousands, by sex, 2000 and 2010

	2000	2010	Change	% Change
Total adult bike riders	24,626	25,202	576	2%
Frequent adult riders	3,008	3,379	371	12%
Frequent % of all riders	12%	13%		
Male adult frequents	1,739	2,004	265	15%
Percent of all frequents	58%	59%		
Female adult frequents	1,269	1,375	106	8%
Percent of all frequents	42%	41%		

Source: National Sporting Goods Association Sports Participation Study 2010 & 2000

Still, there are not enough frequent riders for the industry to thrive. Fewer than 3.4 million adults in the US ride a bicycle frequently, which is only about one-eighth of the total number of adult cyclists. Almost 10.7 million adults ride a bicycle occasionally (25 to 109 days a year). While the size of this group was almost unchanged over the last decade, their demographics changed dramatically. Women were the majority of occasional adult riders in 2000. By 2010, their share had declined to 45%. The number of women occasional riders decreased by almost 800,000 between 2000 and 2010, while the number of male occasionals increased by almost 600,000 (see table 3).

Table 3: Bicycle riding participants and occasional participants who ride 25 to 109 days a year in thousands, by sex, 2000 and 2010

	2000	2010	Change	% Change
Total adult bike riders	24,626	25,202	576	2%
Occasional adult riders	10,893	10,671	-222	-2%
Occasional % of all riders	44%	42%		
Male adult occasionals	5,290	5,862	572	11%
Percent of all occasionals	49%	55%		
Female adult occasionals	5,603	4,809	-794	-14%
Percent of all occasionals	51%	45%		

Source: National Sporting Goods Association Sports Participation Study 2010 & 2000

American women made enormous strides toward equality in the last decade. The majority of college students in the US are now female; one-third of all the women who have ever served in the United States Senate were elected since 2000. It is strange, then, that bicycling has become much more of a man’s world. Nearly half of all adult cyclists who ride do so infrequently, 6 to 24 days a year, according to the NSGA. The number of infrequent cyclists also increased slightly in the last decade. But the number of women who ride infrequently is about 500,000 fewer than it was in 2000, while the number of men who ride infrequently increased by more than 1 million over the decade (see table 4).

Table 4: Bicycle riding participants and infrequent participants who ride 6 to 24 days a year in thousands, by sex, 2000 and 2010

	2000	2010	Change	% Change
Total adult bike riders	24,626	25,202	576	2%
Infrequent adult riders	10,639	11,149	510	5%
Infrequent % of all riders	43%	44%		
Male adult infrequents	4,713	5,725	1,012	21%
Percent of all infrequents	44%	51%		
Female adult infrequents	5,926	5,424	-502	-8%
Percent of all infrequents	56%	49%		

Source: National Sporting Goods Association Sports Participation Study 2010 & 2000

Persuading women to ride is the clearest path to growth for bicycling in the United States. There are signs that this goal is attainable. In the United States, fewer than 2 percent of residents rely on bikes for their daily transportation. But in the Netherlands, where bicycle lanes and bike stands are part of most urban streets, 27 percent of all trips are made by bike and 55 percent of riders are women. And in Germany, where 12 percent of all trips are made by bike, 49 percent of riders are female (see Baker, Linda, “Shifting Gears,” *Scientific American*, October 2009, p. 28).

Bicycle sales will increase in the U.S. when America’s cities and suburbs are re-tooled for bicyclists. Social scientists have long known that women are more risk-averse than men. And despite their recent economic gains, American women still do the bulk of household shopping and child care. In a recent study of bicyclists in Portland, Oregon, women were less likely than men to use on-street bike lanes and more likely to go out of their way to use “bike boulevards,” which are quiet residential streets with special traffic-calming features. And a recent census of an off-street bike path in New York City’s Central Park found that 44 percent of riders were female. Janette Sadik-Khan, who became the head of New York City’s Department of Transportation in April 2007, has been waging a campaign to install traffic-protected bike lanes throughout the city. She knows that wherever traffic is calmed, women cyclists follow.

Demographics of Bicyclists

The bicycle industry has prospered over the last few decades by catering to baby boomers, the massive generation born between 1946 and 1964. America’s 78 million boomers are now between the ages of 47 and 65, and they have surprised everyone by remaining physically active well into their 50s and 60s. Among bicyclists, male boomers and even older men are the most enthusiastic “geezer jocks.” The average annual number of riding days for adult male cyclists increases steadily with age, from about 45 days among men aged 18 to 24 to more than 87 days for male riders aged 75 and older (see table 5).

Women’s average annual riding days show how their lives are different. Women riders aged 18 to 24 actually ride more days per year than men that age do, but their riding days drop off dramatically in the child-rearing age groups of 25 to 34 and 35 to 44. Yet female baby boomers (aged 45 to 64) who ride get in the saddle almost as often as male baby boomers do, and the average number of riding days stays high for women riders in the 65 to 74 and 75-plus age groups (see table 5). This is evidence that women enjoy riding bikes as much as men do. They just have a hard time fitting it in if they are also responsible for shopping and raising kids.

Table 5: Average number of riding days among bicycle riding participants by age and sex, 2010

		AGE						
	Total	18-24	25-34	35-44	45-54	55-64	65-74	75+
Male	57.0	44.6	48.4	53.1	59.5	63.9	73.0	87.4
Female	49.1	46.6	37.6	43.3	61.2	58.6	58.0	71.1

Source: National Sporting Goods Association Sports Participation Study 2010

Despite their economic power, baby boomers are no longer the only consumer segment that matters to the bicycle industry. Only about one-third of bike riders are boomers (aged 45 to 64 in 2000), according to the NSGA. Another 15 percent of riders are in the college and young adult life stage (aged 18 to 24), and fewer than 10 percent are retirees (ages 65 and older). The largest groups of riders (43 percent) are those in the child-rearing ages of 25 to 44. So even though boomers and retirees ride more often and may spend more per rider, young adults have far more potential for increased participation and sales (see table 6).

A look at the ratio of male to female riders by age yields more evidence of the male “geezer jock” phenomenon. Men are the majority of riders in all adult age groups, but their margin ranges from 4 to 8 percentage points over women until the age of 55. Among younger baby boomers aged 45 to 54, for example, only 52 percent of bike riders are male. But men are at least 57 percent of riders among older boomers (aged 55 to 64) and retirees (aged 65 and older), a spread that is 14 percentage points higher than the figure for women (see table 6). Why does the participation of women in bicycling fall off after age 55? It may be concern for safety, as older women are more prone to broken bones and other injuries. It may be a generational difference in attitudes. But whatever it is, the decline is dramatic.

Table 6: US adult bicycle riding participants by age and sex, in thousands, 2010

	18-24	25-34	35-44	45-54	55-64	65-74	75+
Total	3,868	4,804	6,096	4,926	3,417	1,313	778
pct.	15%	19%	24%	20%	14%	5%	3%
Men	2,056	2,480	3,302	2,584	1,960	764	446
Women	1,812	2,324	2,794	2,342	1,457	549	332
% of total	18-24	25-34	35-44	45-54	55-64	65-74	75+
Men	53%	52%	54%	52%	57%	58%	57%
Women	47%	48%	46%	48%	43%	42%	43%

Source: National Sporting Goods Association 2010 Sports Participation Study.

Median age is a statistical measure that finds the midpoint of a group. One-half of the group is older than its median age, and one-half is younger. The median age for adult bike riders in the US is 41.5, which is slightly younger than the median age for the entire US adult population

(45.5). Infrequent riders who get on their bikes 6 to 24 times a year are the youngest group, with a median age of 38.6, and occasional riders who go out 25 to 109 times a year are near the overall average, with a median age of 42. But frequent riders who ride at least 110 days a year are by far the oldest group, with a median age of 48.5 (see table 7). Men are slightly older than women in all three groups. The median age of frequent riders means that this group is dominated by baby boomers, which were between the ages of 46 and 64 in 2000.

Table 7: Median age of U.S. adults and bicycle riders by sex and frequency of riding, 2010

	Median age
All adults (18+)	45.5
Adult bike riders	41.5
Men	41.8
Women	41.0
Frequent riders (ages 18+)	48.5
Men	47.6
Women	49.4
Occasional riders (18+)	42.0
Men	42.3
Women	41.7
Infrequent riders	38.6
Men	39.1
Women	38.2

Adults who ride bicycles are more likely than average to have high incomes, although they are not as affluent as the participants in some other sports, such as downhill skiing or sailing. Two-thirds of households that contain an adult who rides at least six times a year have incomes of at least \$50,000 a year; nationally, only half of households reach this level of income. And nearly one-third of bicycling households earn at least \$100,000 a year, compared with just one-fifth of all US households. Frequent cyclist households are somewhat less likely than occasional or infrequent households to earn \$100,000 or more, perhaps because household income typically peaks among 45 to 54 year olds, and many frequent cyclists are older than 55 (see table 8).

Table 8: Bicycle riding participants by median household income and frequency of participation, 2010, and all US households, 2009

	<\$50,000	\$50,000+	\$100,000+
All US households	50%	50%	20%
All bike riders	35%	65%	31%
Frequent riders	46%	54%	26%
Occasional riders	34%	67%	31%
Infrequent riders	33%	67%	32%

Source: Census Bureau and National Sporting Goods Association Sports Participation Study 2010

We have already seen that bicycling in the US is a man's world, and that attracting more women is an obvious way to re-start the industry's growth. It is important to add that the bicycling community is also overwhelmingly white. Eleven percent of all American adults are black, and 14 percent are Hispanic. But only about 5 percent of adult bike riders are black, and about 6

percent are Hispanic (see table 9). Hispanics are slightly more likely than blacks to ride a bicycle at least six times a year, but the industry still has a long way to go before Hispanics ride at a rate that matches their overall population numbers.

In the long run, attracting minorities to cycling will be of critical importance. Between 2000 and 2010, Hispanics accounted for the majority of population growth in the United States. The combined Hispanic, black, and Asian population already forms the majority of the total population in most of America’s largest metropolitan areas, and their reach will grow rapidly in the next decade. Also, minorities are young: 23 percent of American children are Hispanic, 15 percent are black, and 9 percent are Asian or some other non-white race. Bicycling cannot reverse the recent sharp declines in the participation of children until it finds ways to attract black, Hispanic, and Asian families. Minority populations are overwhelmingly concentrated in large cities and their suburbs – so the key strategy, once again, will be re-designing roads and other infrastructure to make them safer and more bike-friendly

Table 9: Bicycle riding participants and all US adults by percentage black and Hispanic and frequency of participation, 2010

	African American	Hispanic American
All U.S. adults	11%	14%
All adult bike riders	5.1%	6.4%
Frequent riders	4.6%	7.2%
Occasional riders	4.8%	5.9%
Infrequent riders	5.5%	6.7%

Source: National Sporting Goods Association Sports Participation Study 2010

Conclusion

Bicycling over the last decade is a story of good news and bad news. The bad news is that the total number of bicyclists declined due to steep drops in participation among women and children. The good news is that the number of men who ride increased rapidly and also that the number of frequent riders – both male and female -- also increased. The overall number of adult riders was almost unchanged, but this was due to declines in female riding being offset by gains in male participation. Frequent bicyclists are somewhat older than other cyclists and much more likely to belong to the baby boom generation, which included all adults between the ages of 46 and 64 in 2010. But male cyclists actually ride more days after they reach the retirement age of 65, so the boomers may stick around for a long while.

In this environment, the most pressing issue for bicycle stores and suppliers is holding on to loyal customers for as long as possible. But that alone is not enough. The bicycle industry must also seek growth by attracting women back to the sport, and by finding ways to put Hispanic, black, and Asian families on bikes. Women are far more sensitive to safety issues than men are, and more of their daily transportation needs revolve around family activities and shopping. Most of the children in America’s largest cities and states are black, Hispanic, Asian, or from some other non-white race. For this reason, the single best way to attract women and minorities to bicycling is making urban and suburban streets safer and more cycle-friendly.

Sources

Demographic data for the U.S. population in this report comes from the US Bureau of the Census. Data on bicycle riders comes from the survey of sports participation conducted by the National Sporting Goods Association, which has been conducted annually since 1985. The survey is drawn from a panel of 41,000 households and was conducted by mailout-mailback until 2010, when households were invited by mail to complete the survey online. Complete results are available to members of the NSGA. For more information, go to www.nsga.org.

About the Gluskin Townley Group, LLC

Founded in 2004, the Gluskin Townley Group, LLC is a marketing and research consulting firm that works with clients in the bicycle, outdoor, fitness, tennis, skiing, and flyfishing industries. We use our long-range vision, our market wisdom, and our research-based insight to craft solutions to today's challenges for our clients. To learn more about our products and services, visit www.gluskintownleygroup.com.

About Brad Edmondson

The report's author, Brad Edmondson, is the former editor of American Demographics magazine and a national authority on demographics and consumer behavior. He has been consulting and speaking with the bicycling industry for more than 15 years, and has enjoyed a long partnership with Elliot Gluskin and Jay Townley.