

Economic Impact Pilot Study

Presentation of Results
NBTDA Annual Conference
November 11, 2011



Topics of Discussion

- Background
- Who is the consumer?
- Ride participation
- Travel
- Economic Impact
- Why is this importance?
- What comes next?
- Q&A



Background

- Group effort building the survey
- 11 ride directors
- 11 rides received responses
- Survey began June 29, ended October 15
- 3,039 consumers took the survey

Background

Ride/Event	# Participants	# Responses	% Response
BonTon Roulet	647	139	21.5
BRAG	1,150	18	1.6
BRAG Spring Tune-Up	799	2	0.3
BRAN	566	144	25.4
Cycle Oregon Week	2,270	1,125	49.6
Cycle Oregon Weekend	1,790	105	5.9
GOBA	2,481	30	1.2
LMB Shoreline West Bike Tour	628	203	32.3
MUP Ride	136	60	44.1
RAGBRAI	12,297	1,194	9.7
Tri-State Ride by ShuttleGuy	60	19	31.7
TOTAL	22,824	3,039	13.3



Demographic Profile

- 63% Male/37% Female
- 70% Age 45-64
 - Average age: 53.7
- 57% HHI \$100,000+
 - Average HHI: \$129,015
- 33% Have children in household

Spend, on average, 11.4% of their discretionary income on bicycling

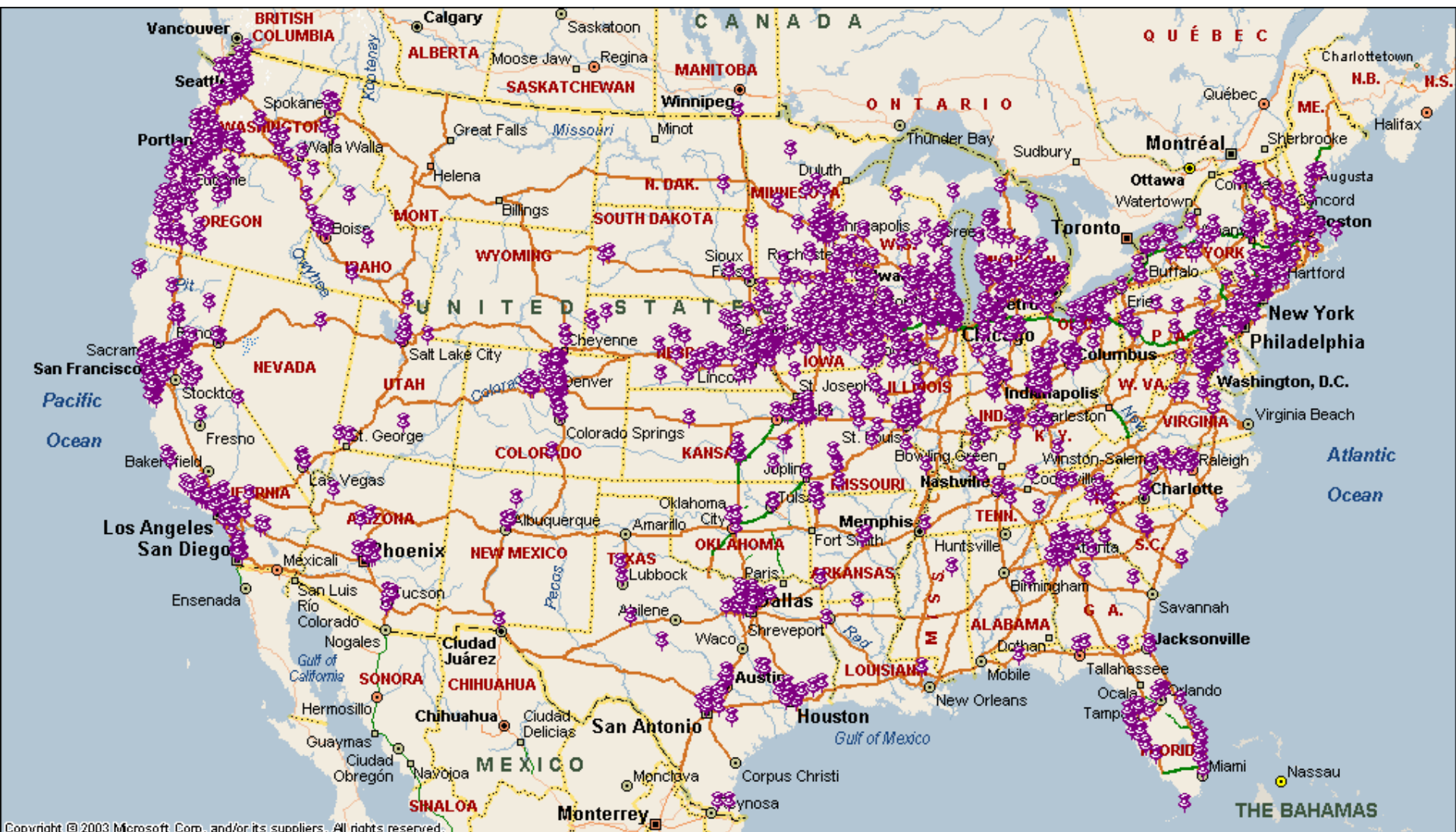


Demographic Profile

- Discretionary spending
 - *All available dollars left after taxes and living expenses are met*

	Typical HH	HHI \$100K- \$149K	HHI \$150K- \$249K	HHI \$250K+
Average amount of discretionary dollars available	\$12,800	\$19,400	\$30,200	\$54,000
% Difference		52%	136%	322%
Amount spent on bicycling		\$2,212	\$3,443	\$6,156

Geographic Profile



Bicycling Profile

- 91% Ride 2+ times per week
- 86% Own 2 or more bicycles
 - 2.8 bicycles personally owned (average)
- Types of bicycles ridden
 - 83% Road bikes
 - 44% Mountain bikes
 - 32% Hybrid/cross
- Reasons for riding
 - 95% Fitness
 - 93% Fun
 - 76% Organized cycling events
 - 70% Social activity



Bicycling Profile

Motivations for spending more time riding your bicycle:

- **Safer roads** (67%)
- **Wider/better maintained shoulders** (64%)
- **More bike lanes** (59%)
- More free time (56%)
- **More designated bike routes** (46%)
- More considerate drivers (44%)
- **More bike trails** (44%)
- **More places to ride** (39%)

Active Lifestyle Profile

Most popular activities in which respondents participate:

- | | |
|-----------------------------------|-------------------------|
| 1. Camping (60.1%) | 6. Snow skiing (32.9%) |
| 2. Walking for exercise (59.6%) | 7. Boating (28.2%) |
| 3. Hiking (58.8%) | 8. Water sports (24.4%) |
| 4. Walking for recreation (48.4%) | 9. Golf (20.7%) |
| 5. Running (34.6%) | 10. Backpacking (20.4%) |

Purchase Profile

- Purchased in the past 12 months
 - 92% Apparel
 - 45% Lights
 - 40% Footwear
 - 39% Helmet
 - 38% Cyclecomputers
- Where purchases were made
 - 88% specialty bicycle retailer/bike shop
 - 44% online retailer
 - 39% specialty outdoor retailer (i.e. REI)
- Average spent \$1,112.77

**57% of purchases
made specifically for
the event/ride!!**

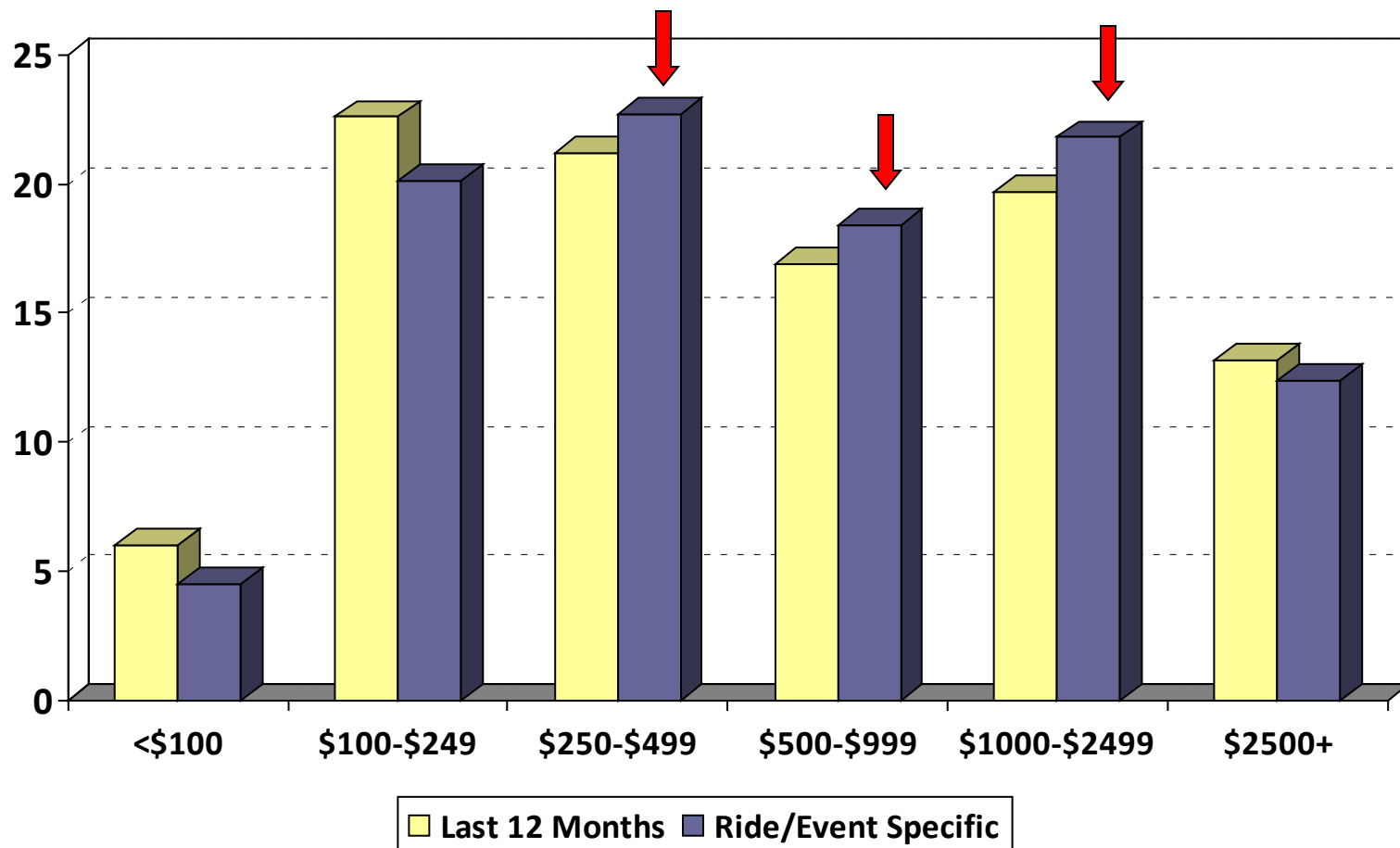


Purchase Profile

- Purchased a cycling-related product specifically for event/ride

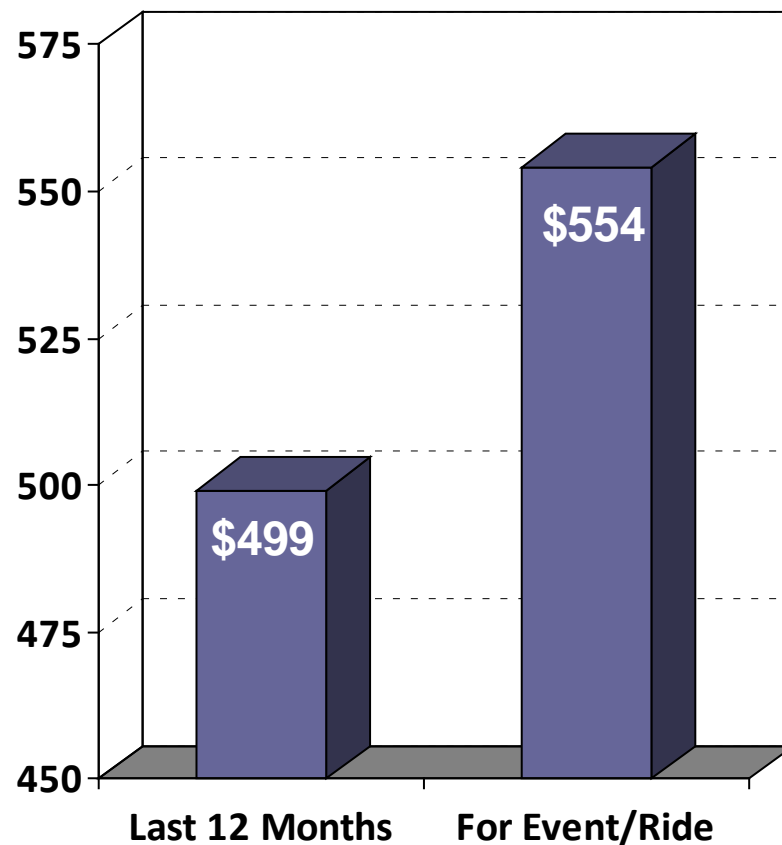
Item	Last 12 Months	For Ride/Event	Difference
Footwear	39.5%	45.9%	+6.4
Pumps	30.7%	36.4%	+5.7
Apparel	92.1%	96.6%	+4.5
Cyclecomputers	38.3%	42.4%	+4.1
Helmets	39.0%	42.5%	+3.5

Purchase Profile



Purchase Profile

- Overall median spending on event- or ride-specific purchases is 11% higher than normal!



Ride Participation Profile

- 80% Participated in the ride/event as part of a larger group

Travel to/from Ride

- 55% will travel 300+ miles
 - One in three (35%) will travel 500+ miles!
- 57% will cross state lines
- 75% have traveled to another state to participate in a ride
- 82% will drive themselves
- 13% shipped their bicycles

Economic Impact

Direct Impact



**Indirect Impact
plus "Ripple" effect**

Economic Impact

- Cycling-related purchases specific to the ride
- Bicycle shipping expenses
- Travel expenses to/from the ride
- Personal expenditures at the ride
- Group support expenditures at the ride

Economic Impact

Ride-Related Purchases

22,824 consumers

X

57.1% made purchases specifically for the ride

=

13,032 consumers

X

Average \$1,118.98

=

\$14,582,547.36



Economic Impact

Bicycle Shipping Expenses

22,824 consumers

X

13.1% shipped their bicycle

=

2,990 consumers

X

Average \$170.59

=

\$510,064.10



Economic Impact

Travel Expenses

Category	% Spend	Avg. \$	# Consumers	Total \$
Gasoline (car)	73.3	\$157.51	16,730	\$2,635,142.30
Tickets (bus, train, plane)	16.9	\$355.99	3,857	\$1,273,053.43
Food (grocery/convenience)	55.7	\$59.03	12,713	\$718,572.19
Food (restaurants)	65.2	\$101.76	14,881	\$1,514,290.56
Shopping (excl. food)	22.8	\$111.28	5,204	\$579,101.12
Lodging (hotel/motel)	30.8	\$216.30	7,030	\$1,520,589.00
Lodging (RV)	2.6	\$628.52	593	\$372,712.36
Lodging (B&B)	1.0	\$189.93	228	\$43,304.04
Lodging (campground)	6.5	\$137.94	1,484	\$204,702.96
Sightseeing	8.1	\$78.64	1,849	\$145,405.36
Entertainment	13.7	\$100.70	3,127	\$314,888.90
TOTAL – TRAVEL				\$9,321,762.22



Economic Impact

Personal Expenses at Event/Ride

Category	% Spend	Avg. \$	# Consumers	Total \$
Gasoline (car)	20.6	\$147.37	4,702	\$692,933.74
Food (grocery/convenience)	57.4	\$71.33	13,101	\$934,494.33
Food (restaurants)	65.0	\$130.36	14,836	\$1,934,020.96
Shopping (excl. food)	41.1	\$88.40	9,381	\$829,280.40
Lodging (hotel/motel)	13.6	\$233.01	3,104	\$723,263.04
Lodging (RV)	1.7	\$416.11	388	\$161,450.68
Lodging (B&B)	1.1	\$192.44	251	\$48,302.44
Lodging (campground)	6.6	\$222.89	1,506	\$335,672.34
Sightseeing	11.0	\$56.29	2,511	\$141,344.19
Entertainment	17.4	\$78.05	3,971	\$309,936.55
TOTAL – PERSONAL				\$6,110,698.67

Economic Impact

Group Support Expenses at Ride/Event

Category	% Spend	Avg. \$	# Consumers	Total \$
Gasoline (car)	10.2	\$232.41	2,328	\$541,050.48
Food (grocery/convenience)	11.0	\$168.43	2,511	\$422,927.73
Food (restaurants)	10.2	\$173.42	2,328	\$403,721.76
Shopping (excl. food)	6.0	\$139.60	1,369	\$191,112.40
Lodging (hotel/motel)	2.8	\$289.67	639	\$185,099.13
Lodging (RV)	0.8	\$538.39	182	\$97,986.98
Lodging (B&B)	0.2	\$30.60	46	\$1,407.60
Lodging (campground)	1.1	\$193.32	251	\$48,523.32
Sightseeing	2.0	\$93.47	456	\$42,622.32
Entertainment	3.3	\$180.71	753	\$136,074.63
TOTAL – GROUP				\$2,070,526.35

Economic Impact

Total:

Event-related purchases	\$14,582,547.36
Bicycle shipping expenses	\$ 510,064.10
Travel to/from event	\$ 9,321,762.22
Personal spending at event	\$ 6,110,698.67
Support spending at event	<u>\$ 2,070,526.35</u>
Grand Total	\$32,595,598.70



Why Is This Important?

- Positioning as an economic engine
 - Your individual rides/events for the communities and regions
 - The NBTDA on a national scale
- Increase advocacy success
- Increase business success



Next Steps

- NBTDA goal = 50% or higher participation rate among all members
- Sign up your rides/events!



THANK YOU!

ANY QUESTIONS??

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