
People Who Ride Bikes **Talk **Sustainability****

An Insights Report

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Intro.

This spring, Walden Hyde conducted a survey to better understand what people who ride (and buy) bicycles think about sustainability, both in general and as it relates to bikes. We got nearly 1,000 responses from folks across the country, representing a wide range of riders, from casual cyclists to serious racers. These insights gave us a sense of consumer sentiments and intentions around sustainability and showed us some interesting perceptions about the “green-ness” of bikes.

Following the survey, we did a “deep dive” with a group of ten cycling enthusiasts from all over the US. These in-depth conversations provided perspective on how sustainability stacks up in the day-to-day lives of people who can’t live without their bikes.

We discovered that, as always, good intentions don’t necessarily translate into actions. But cyclists of all ages, tire preferences, and political persuasions are thinking about sustainability. It’s time the bicycle industry did, too.

Here’s what we learned.



Who They Are

Mostly Men

68% men; their average age is 42
32% women; their average age is 40
60% of our respondents have children

Geographically Diverse

Our survey respondents came from 48 different states and a few overseas destinations.

Well Educated

80% of our respondents have completed college, and 30% have a Masters Degree or PhD.

Politically Diverse (but lean left)

48% are Democrats
19% are Independent
10% are Republicans
15% didn't want to talk politics



Why They Ride

Your customers ride for physical and mental health and to be outside. They also ride for transportation and to spend time with family and friends.

Cycling lets you escape and experience the world as few ever do. You can go fast and scare yourself, or you can go for a casual spin and absorb your surroundings. You can ride for transportation and you can ride for fun, and you can do both at the same time! There is no better thing than bicycling. —Corvallis, OR

While 250 people reported that they race, and more than half of our respondents listed road bikes as their primary ride, *competition* was the least common response reported for “reasons I ride.”

Some folks wrote their own answers to the “reasons I ride” question. The bulk of these responses focused on

the environmental benefits of bicycling, such as helping to reduce traffic congestion (and avoiding it themselves) and limiting their dependence on foreign oil.

They also wrote things like *joy*, *freedom*, and *fun*.

When asked to choose what type of cyclist best describes them, 288 of our respondents identified with the term *weekend warrior*, 205 primarily considered themselves *commuters*, 176 people chose *casual rider*, and 105 classified themselves as *racers*.

More than 171 people chose to self describe, using words such as *avid*, *dedicated*, *committed*, *passionate*, *serious*, and *addicted*.

Essentially, people ride bikes because it makes them feel healthy and happy.



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What They Ride

Half of them are road bikers. Roughly half of our respondents, about 480 people, identified themselves as road bikers, with mountain biking, commuter/townie riding, and "other" (folks listed everything from tandems to unicycles here) neck-and-neck at about 125 respondents each. Roughly 120 well-rounded riders reported that they roll road, mountain, and commuter/townie bikes equally.

They care about fit and comfort. They look at price. Some are loyal to their favorite brands. But fit and comfort are their top priorities when it comes to buying a bike.

And they spend money on bikes and accessories. 85% of those surveyed spent more than \$100 on bike components in the last year, and more than 54% spent more than \$100 in the last month.



What They Think

Bicyclists think about sustainability in their day-to-day lives.

22% of your customers consider themselves “eco” shoppers and buy green products whenever possible. 45% buy green sometimes, and 20% are “open to it.”

That means 87% of your existing consumers think about sustainability to some degree.

They eat healthy, but not too healthy.

- 55% of our respondents purchase organic food regularly (daily, weekly) and another 28% report that they purchase it monthly.
- 32% of respondents wouldn't touch fast food, but 39% eat it monthly, and 21% admit to fast food on a weekly basis.

They buy “eco” products, but not always.

- 75% of our cycling respondents purchase non-toxic cleaning products regularly (monthly, weekly).
- Roughly the same number of people admit that they regularly choose conventional products because they cost less than eco-friendly alternatives.

I prefer organic, but sometimes compromise due to price. —Fort Collins, CO

In fact, our survey respondents told us that price (25%) and lack of options (20%) are the primary things that keep them from living a more sustainable lifestyle. Nine out of ten of our deep divers blamed time.

But when it comes to bikes ...

Most folks haven't thought much about environmental and social sustainability when it comes to bikes.

- 28% of respondents haven't given it any thought
- 25% have given it some thought, but feel other factors are more important

For many of the people we surveyed, this was the first time that they'd connected sustainability and the materials and manufacture of bicycles and accessories.

Q: Have you ever thought about the social or environmental resources/impacts that go into the making of a bike (manufacturing, etc)?

A: *Not as much as I should have.*

Q: Have your thoughts about the question above ever affected your reasons for buying one bike over another one?

A: *No, but it will affect my next purchase. —Moab, UT*

The other 37%

37% of our respondents say they think about sustainability when making bike and accessory purchases and have made some purchasing decisions with sustainability in mind.

- I think about it, but I don't see anything happening in that part of the industry yet.
- I've thought about it, and I buy biodegradable lubes and cleaning agents.
- I think about it, but it's tough to find alternatives in the bike industry.
- Quality, durability, and lifespan are environmental factors I consider.
- Absolutely!

Surprisingly, these folks represent a fairly diverse cross section of our respondents—and include racers and a significant number of our “I ride 'em all” enthusiasts.

What They Think

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Bikes are inherently green.

Most people think bikes are green. 80% of the cyclists surveyed believe the bicycle is a green product, and cited the following reasons to back up the claim:

- I don't use gas.
- Isn't it self-evident? No CO₂, less wear and tear on the roads, good for body, good for soul, good for not having to pay for parking.
- Burns fat not gas.

Or are they?

20% of folks surveyed see another side of the story.

- Riding a bike is better than driving a car, but the production process is FAR from clean.
- I think using a bike is a green decision, but the bike itself doesn't seem to be a green product.
- Carbon fiber and other components hardly seem green in their manufacturing process.
- It could be, but not just by the nature of being a bike. Who knows what it's made out of and where it's from.
- Materials are expensive on energy to produce [and] bikes are replaced often.
- With all the pollutants that go in making the products, how can it be green?
- No, I drive to all my races.

I wouldn't say that the bike is "green" but it allows you to live more "green." —Brooklyn NY

What's interesting to us is that this 20% (roughly 200 riders) represent a balanced cross section of people. They're not heavily weighted in a particular riding style, education level, or political persuasion (in fact, they're

more politically diverse than our survey group as a whole). And they're not exceptionally green. Only 28 of them consider themselves "eco shoppers," and this group sites everything from time, to lack of options, to simply not caring that much as holding them back from a more sustainable lifestyle.

Wait, I guess I don't know what to think?!

- Can't say I fully understand the manufacturing process as being green, but in terms of a mode of transportation yes.
- The life cycle is unclear with many metallic and persistent parts.
- I don't like the term "green."

People say they will pay for sustainability.

62% of all of those surveyed said they'd pay more for a bike that was made with sustainable manufacturing and labor practices.

Who are they:

Women accounted for 150 of the 375 people who indicated that they'd pay 10% or more for a sustainably built bike. Given our survey odds (remember, only 300ish women responded to the survey) this is significant.

Other than that, this group represents a fairly even cross section of rider types—with the exception of racers. Most of the dedicated racers surveyed aren't that interested in paying more for a sustainably built bike.

I make an effort to purchase bikes and accessories from companies that care about sustainability.

—Survey Response

Why You Should Care

Brand Implications

So, what does all of this mean?

People who ride bikes care about sustainability. Most of them believe bikes are sustainable products because bikes enable a more sustainable lifestyle. Some folks assume bike companies are thinking about sustainability, so customers don't have to.

This section outlines opportunities for making sustainability a part of both your operations and your brand story, as well as looks at the risks of avoiding sustainability in today's market.

It's a cultural fit.

Bicyclists tend to lead more sustainable lives than mainstream Americans. They eat more organic food. They think more about their driving habits (some make efforts to reduce their car time, while others live with cognitive dissonance about it), and they tend to buy more natural products.

But many cyclists have yet to connect the dots from sustainable choices in other areas of their lives to sustainability in bicycle-related purchases.

This is because connecting the sustainability dots is a process that most often starts close to home, with personal health or family well being, and then evolves outward. It doesn't follow a prescriptive or particularly logical path. Since sustainability is a part of your core customers' lives, bike brands need to be ready to meet these customers' expectations when their connect-the-dot processes hone in on bike products.

Market readiness may exceed demand.

Leaders and innovators don't confuse market readiness with consumer demand. Real consumer demand for sustainable bike products is currently low because other factors, such as comfort, fit, price, and performance, drive purchase decisions. But that doesn't mean the market isn't primed. Your job (and opportunity) is to bring sustainability to market in the right way for your customers.

Your customers expect you to be doing something already.

Particularly because cycling itself is an environmentally friendly and largely outdoor activity, customers expect that their favorite cycling brands are already environmentally and socially responsible. Your business could be at risk if you don't address sustainability before customers start asking tough questions.

This explains why some people answered that they wouldn't pay more for a sustainable product; they expect environmental and social responsibility to be a given, not a value add.

I expect [bike] companies to be responsible. It shouldn't be an extra add-on to pay people decent wages and make responsible environmental choices.

—Survey Response

Additionally, sustainability is a new and emerging area, and there's a lot of consumer confusion about what it all means. Because of this, consumers are looking to you to lead in a clear and compelling way.



Why You Should Care

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Do it well.

People buy from brands they trust, and sustainability is part of that equation. Beyond being prepared for customers' questions when they begin to connect the dots, focusing on sustainability can uncover new ways to innovate and deliver the highest quality products to your customers. It builds your trust as a company that anticipates its customers' needs.

Additionally, cyclists aren't buying a sustainable product from you just because it's better for the environment, they're buying it from you because of who they believe you are and what they believe you're doing to make the world a better place. Just like quality, innovation, and delivery, you have to live up to your customers' expectations in the sustainability space.

This trust reinforces and builds your brand's reputation and creates a relationship with your customers that keeps them coming back.

Customers reward brands for doing *something*.

As long as your intentions are clear and honest, you don't have to be perfect. Laying out a roadmap, even a rough one, and articulating your vision for a more sustainable product produces high brand loyalty from your customers. It's called being *flawsome*, and consumers love seeing the human side of their favorite brands.

Find new ways to connect with customers.

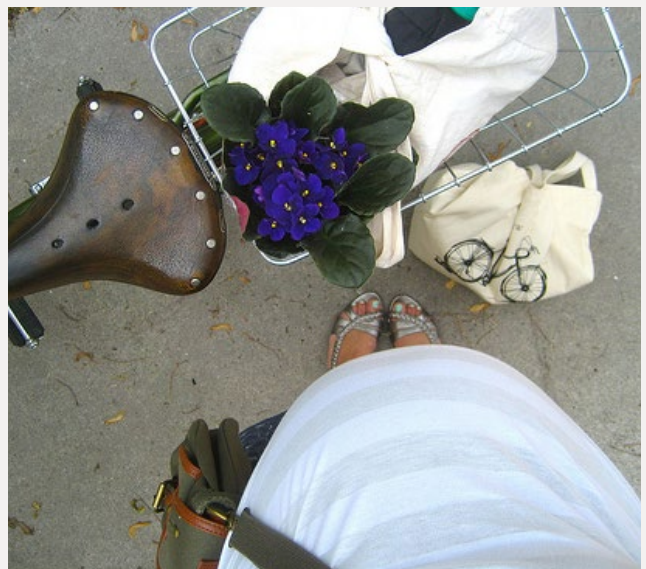
Every company wants to find new ways to engage with their customers. Sustainability opens the door to deeper relationships. Companies that do good benefit from the halo effect ... you just have to keep your halo shiny and, when you stumble, be open and honest.

Tell a customer story, it spreads faster.

If you have something to hide, put it on the side of a box or at the bottom of your website in tiny type. But if you're really making strides and doing good, telling the story in a way that resonates with customers will draw their attention and develop higher brand affinity.

Know your customers' priorities.

Your customers are buying your bikes for a reason—comfort, quality, performance, price—so when you're integrating sustainability concepts into your brand, be sure you're positioning them in the right way. If you've started to use recycled-content products, still lead with performance and quality. If you're streamlining shipping and want to tell your customers about it, show them how, by doing good, you can deliver their products faster or less expensively.



Why You Should Care

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ROI

Sustainability is not a one-size-fits-all formula. While there are best practices and low hanging fruit, if you want your brand to benefit from the sustainability measures that you tackle, they have to be aligned with your brand values and your customers' values. And how you talk about them matters. Here are examples of how you might approach sustainability with ROI in mind:

1. Your customers value performance.

Focus on on-shoring production. **Talk** about higher quality control, more innovation through closer relationships between R&D and production, and faster market responsiveness through lean manufacturing.

2. Your customers value price.

Focus on reducing your product packaging. **Talk** about how you pass the savings on to your customers.

3. Your customers value NOT driving.

Focus on streamlining your shipping and carbon usage. **Talk** about fuel reductions in terms that inspire your customers. Tell them how many of those damn trucks you kept off the road—and celebrate them for doing their part, too.

4. Your customers love to be outside.

Focus on air quality and environmental health. **Talk** about it in a way that inspires your customers and shows them you know deep lungfulls of clean, fresh air and pristine landscapes are what it's all about.



Pick Your Direction

Addressing sustainability might seem overwhelming. There are seemingly endless operational inputs to measure, you don't have enough time to consider the appropriate next steps, there is the bottom line to watch. We get it; it's a lot to think about. But there are some clear options.

Do nothing

As a company, you can decide to do nothing when it comes to taking real sustainability steps. By doing nothing, you don't need to invest time or money looking into the sustainability of your business and products, but you risk customer trust and opportunities to stay relevant in an industry that's changing quickly.

Collaborate

Another option is to collaborate with companies that share your supply chain, or use similar production methods, to come up with best practices. This may seem counterintuitive to being competitors, but there are great examples from the outdoor industry, apparel industry, and car industry of companies coming together to collaborate on systematic sustainability measures that streamline production for everyone. Through collaboration, companies can pool resources and best practices to create an industry-wide lever for change.

Lead


If industry-wide collaboration isn't an option, or if aspects of it move too slowly for your taste, you can create a competitive advantage by being an independent leader. If you can offer an innovation or system that customers see as better (faster, stronger), you can gain customer trust as well as respect within the industry.

Mix it up

There's also a hybrid approach between collaboration and innovation: You can collaborate on aspects of sustainability that form your platform (the not-as-sexy stuff) and innovate in areas that are specific to your brand. This way, you can make real strides towards operational sustainability, while building your company's brand identity through your distinct sustainability story.




WALDEN HYDE



Walden Hyde integrates sustainability into brand stories and drives behavior change through uncommon creative campaigns.

Based in Boulder, CO, Walden Hyde is made up of anthropologists, storytellers, sustainability experts, and designers.



Great big thanks to our “deep dive” participants for the awesome pics of their lives on bikes.



To Inquire Further:

HiThere@waldenhyde.com
303.847.0856
954 Pearl St
Boulder, CO 80302

waldenhyde.com