



San Diego, California North America's Cycling Capital



WHOLESALE: CYCLING & RELATED MANUFACTURING

50+ 50+ companies operate in San Diego

\$97.4M Annual revenues: \$97.4M

\$547M TOTAL ESTIMATED ANNUAL REVENUE

RETAIL: BIKES AND RELATED CYCLING GEAR

\$220M 227 local specialty bike retail shops = Annual sales revenue of \$220 million

1,226 The local bike shops employ an estimated 1,226 full time equivalent worker

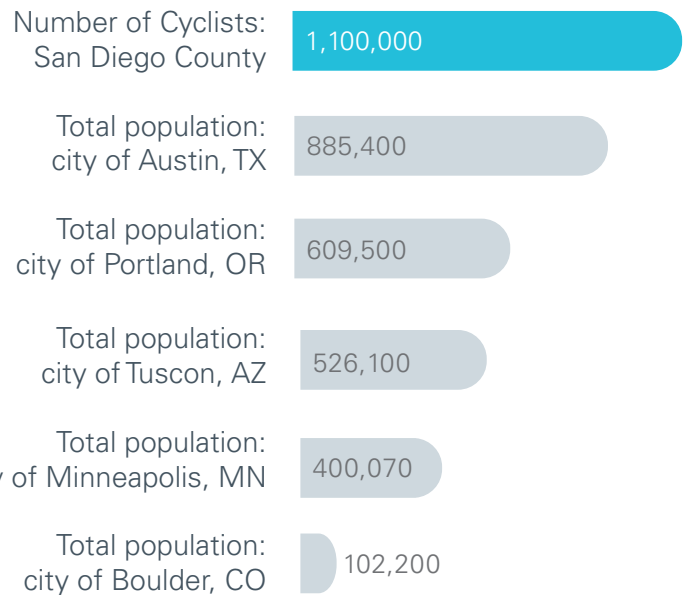
\$230M Other retail = annual sales of \$230 million in bikes and accessories

\$56M In retail salaries & wages

THE CYCLING CONSUMER

- + **One-third** of San Diego County residents (1.1 Million people) currently participate in cycling
- + **37%** of San Diego County cyclists (407,000 people) are "Frequent / Avid" cyclists
- + San Diego cyclists **29% more likely** to purchase a new bike in the next year than U.S. cyclists overall
- + San Diego has experienced an **84% increase** in the number of bicycle commuters since 2000

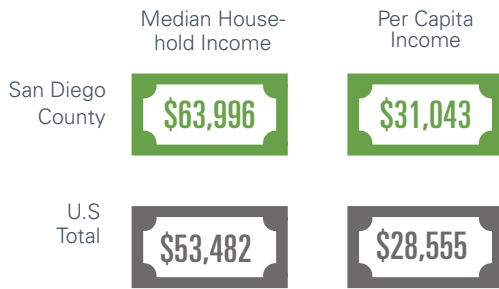
SAN DIEGO CYCLING POPULATION DOMINATES



SAN DIEGO DEMOGRAPHICS SUPPORT BOTH PARTICIPATION AND INDUSTRY GROWTH

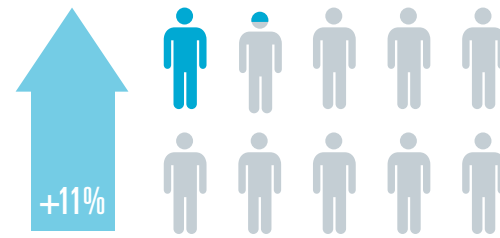
San Diegans Skew Higher Income

*U.S Census Bureau



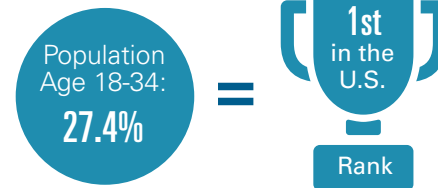
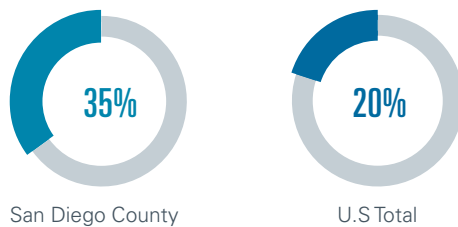
Population Growth Rate (2010-2030)

*Urban Institute



Households with Children

*U.S Census Bureau



* San Diego EDC

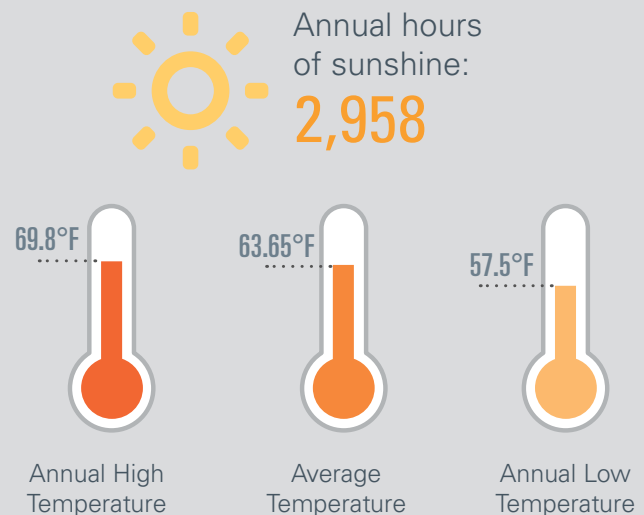
SAN DIEGO IS A PIONEERING LEADER

- + Emphasis on high-performance fitness.
- + Leading engineering of high performance machines.
- + A hotbed of Triathlon training.
- + Political will to get the population out of cars and onto bikes.

INFRASTRUCTURE STRONG AND GROWING

- + As of 2015, San Diego County has approximately 1,340 miles of bikeway facilities.
- + The City of San Diego plans to more than double its bikeways facilities by 2030.

SAN DIEGO CLIMATE



Primary & secondary research conducted by:

Stitch Marketing + Research

Fermanian Business & Economic Institute



For more information:

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Research Sponsors

SDSI is a nonprofit business development organization. Our mission is to make San Diego the capital of the Sports and Active Lifestyle (SAL) Industry. We provide connections, collaboration opportunities, continuing executive education and business mentoring through our accelerator program, SDSI Springboard. Since 2009 SDSI Springboard has graduated 61 companies. Graduates have raised \$47.5M in capital funding, have created 390 jobs and 89% are still in business. SDSI represents over 90 SAL companies. The sum of our members' businesses represent the "San Diego Lifestyle"

Willis

