

Numbers Don't Lie: Why Women Are Essential to The Future of Bicycling!

An LAB Women Bike & *American Bicyclist*
Study Webinar

August 28, 2014



Today's Presenters



Adonia Lugo
Equity Initiative Manager
League of American Bicyclists



Liz Cornish Jones
Women Bike Manager
League of American Bicyclists



Creating pathways for women of diverse backgrounds to embrace biking as an everyday activity, and participate as riders, advocates and leaders to create strong communities and celebrate the joy of riding a bike.

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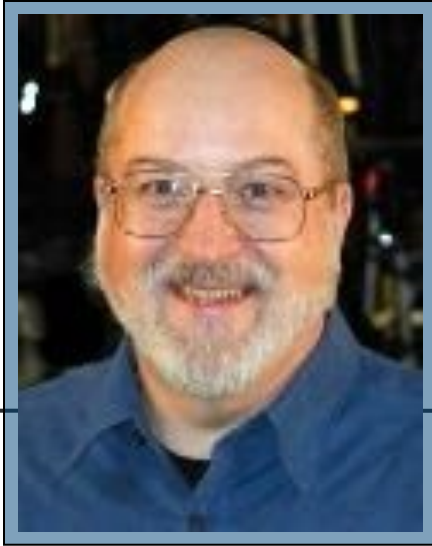
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Today's Presenters



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

Today' s Agenda

- *Women Are Essential to the Future of the Bicycle Movement and Industry*
- Women are still under-represented...but are having a significant impact on the economics of the bicycle movement and business.
- Women are the new majority and really understanding what women are saying and what their bicycling and bicycle wants and needs are has become vitally important!
- Women have to begin to have more impact on the bicycle business if the traditional mainstream commercial trade hopes to continue to be viable.
- Summary
- Q & A

Women Are The Future

Women Are Essential to the Future of the Bicycle Movement and Industry – the purpose of this webinar is to initiate a dialog and sound a wake up call to advocates, bike shop owners and industry leaders concerning the economic importance of this statement!

\$2.6 billion

Adult Female Bicyclist

Total Adult Bicyclists
2014 By Gender

2014			
		Male	Female
Total Adult Bicyclists	26,000,000		
Adult Male Bicyclists		12,740,000	
Percent of Total		49%	
Adult Female Bicyclists			13,260,000
Percent of Total			51%

Source: American Bicyclist Study

Adult Female Bicyclists

Total Adult Bicyclists by Gender
2012, 2013 and 2014

	2012	2012 %	2013	2013 %	2014	2014 %
Total	25,352,000	100.0	28,544,000	100.0	26,000,000	100.0
Men	12,930,000	51.0	14,679,000	51.4	12,740,000	49.0
Women	12,422,000	49.0	13,865,000	48.6	13,260,000	51.0

Source: American Bicyclist Study

Adult Female Bicyclists

Adult Bicyclists
Planning to Purchase a New Bicycle in 2014
By Gender

2014			
	Male	Female	Total
Adult Male Bicyclists	12,740,000		
Adult Female Bicyclists		13,260,000	
Percent who are planning to Purchase a <u>New</u> Bicycle in 2014	19.0	19.0	
Number who are planning to Purchase a <u>New</u> Bicycle in 2014	2,420,600	2,519,400	4,940,000
Average Amount planning to spend on next <u>New</u> Bicycle in 2014	\$883.40	\$468.04	
Projected total amount planning to spend on <u>New</u> bicycles in 2014	\$2.1 billion	\$1.2 billion	\$3.3 billion
Percent by Gender	64.0	36.0	100.0

Source: American Bicyclist Study

Adult Female Bicyclists

Adult Bicyclists
Planning to Purchase All Bicycle Related Products and New Bicycles in 2014
By Gender

2014	Male	Female	Total
Males who plan to purchase a new bicycle	2,420,600		
Females who plan to purchase a new bicycle		2,519,400	
Average Amount planning to spend on all Bicycling Related Products <u>Except</u> the Bicycle in 2014	\$1,027.05	\$565.72	
Projected total Amount planning to spend on all Bicycling Related Products <u>Except</u> the Bicycle in 2014	\$2.5 billion	\$1.4 billion	\$3.9 billion
Projected total Amount planning to spend on New Bicycles and all Bicycling Related Products in 2014	\$4.6 billion	\$2.6 billion	\$7.2 billion
Percent by Gender	64.0	36.0	100%

Source: American Bicyclist Study

Women in the bicycle movement and business

Despite women being under-represented in all aspects of the bicycle movement and business they are having a significant impact on advocacy and the economics of the bicycle movement because they are working hard at their voices being heard and their presence felt.

Women in the bicycle movement and bicycle business

Demographic Profile of U.S. Bike Shop Owners

	Male	Female		
Gender of Owner	89.5%	10.5%		
	Yes	No		
Husband-and-Wife Team	32.9%	67.1%		
Average Age of Owner	52.8			
	Generation Y 18-27	Generation X 28-47	Baby Boomer 48-67	Silent Generation 68-87
Age by Generation of Owner	0.7%	26.4%	66.4%	6.4%
	White	Asian	Black/African-American	Hispanic-Latino
Race/Ethnicity	96.4%	3.2%	0.4%	2.6%

Source: National Bicycle Dealer Association (NBDA) U.S. Specialty Bicycle Retail Channel 2013 Study and Report

Women are the key to the future

Women are not only the new majority, they are also the key to the future of the bicycle movement in America, and accordingly they are essential to the future of the bicycle business.



Women are the key to the future

U.S. Adult Women and U.S. Adult Female Bicyclists

	U.S. Adult Women	U.S. Women %	U.S. Adult Female Bicyclists	Adult Female Bicyclists % of U.S. Adult Women
Total	124,501,347	100%	13,260,000	10.7%

Sources: US Census Bureau, Current Population Study 2013 (HHI for 2012 Households);
American Bicyclist Study

Women are the key to the future

Adult Bicyclists
Gender of the Adult Bicycling Segments
2014 compared to 2012

	Adult Bicyclists	Enthusiasts	Moving Ups	Casuals	Infrequents
2014					
Male	12,740,000	2,527,000	2,531,000	2,545,000	5,137,000
Male%	49.0%	65.5%	57.9%	49.9%	40.5%
Female	13,260,000	1,333,000	1,841,000	2,552,000	7,534,000
Female %	51.0%	34.5%	42.1%	50.1%	59.5%
2012					
Male	12,930,000	2,237,000	1,420,000	3,094,000	4,921,000
Male%	51.0%	78.0%	55.0%	62.0%	44.0%
Female	12,422,000	631,000	1,161,000	1,896,000	6,264,000
Female%	49.0%	22.0%	45.0%	38.0%	56.0%
Difference					
Male	(190,000)	(241,220)	857,900	(1,070,220)	(552,200)
Female	838,000	552,220	472,100	336,220	293,200

Source: American Bicyclist Study

Really understanding what Women are saying....

Really understanding what women are saying and what their bicycling and bicycle wants and needs are has become vitally important!



Really understanding what Women are saying...

Perhaps that was one of the points of the Bike Design Project, a collaboration Among Levi's, the nonprofit group Oregon Manifest, and others. Here's a quote from the project's mission statement:

"The two-wheeled revolution isn't going to roll out on niche or specialty bikes. It's going to be born on the streets, and it will be spread by the urban rider."

"Most people want to lead healthier, more sustainable lives, yet they don't consider themselves "cyclists." The Bike Design Project is aimed at these citizen riders—inciting the creation of new bike designs that meet their everyday needs and provide a better transportation experience."

Really understanding what Women are saying...

Adult Bicyclists
Are You Riding Your Bicycle As Much As You Would Like?
By Gender

2014		
	Male	Female
Yes	40.0	26.0
No	60.0	74.0

Source: American Bicyclist Study

Really understanding what Women are saying...

2014 Demographics of U.S. Adult Bicyclists
By Gender

	Male	Female
Total Adult Bicyclists	12,740,000	13,260,000
Average Age	49.6	42.2
Education		
College Graduate or Higher	53%	46%
Household Income		
Average Household Income	\$66,750	\$56,050
Household Income \$100,000 or higher	19%	13%
Race		
White	85%	85%
African-American	8%	7%
Hispanic	4%	4%
Asian	8%	4%
Children under 18 in household	27%	43%

Source: American Bicyclist Study

Women have to have more impact!

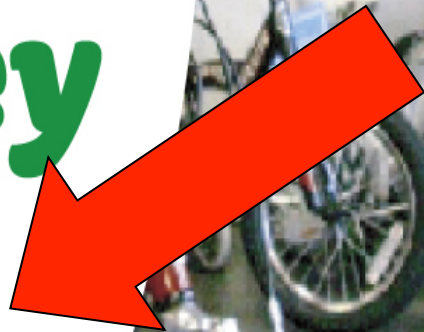
Women have to begin to have more impact on the bicycle business if the traditional mainstream commercial trade hopes to continue to be viable.



Retail Experience

The Novice's Problem Journey

Something challenging





Retail Experience



Women have to have more impact!

Adult Bicyclists
How Many Visits Did You Make To A Bike Shop In The Past 12 Months?
By Gender

2014		
	Male	Female
Average Those That Visited	3.0	2.7
Average All Respondents	1.3	1.0
I Did Not Make Any Visits	56%	62%

Source: American Bicyclist Study

Women have to have more impact!

Adult Bicyclists
Where They Plan to Purchase Their Next Bicycle in 2014
By Gender

2014		
	Male	Female
Specialty Bicycle (Bike Shop)	70.0	42.0
Discount Store	77.0	54.0
Sporting Goods Store	20.0	9.0
Specialty Outdoor	27.0	18.0
Warehouse Club	29.0	18.0
Swap Meet/Flea Market	19.0	15.0
Auction/eBay	23.0	22.0
Online	31.0	12.0
Don't Know	27.0	45.0

Source: American Bicyclist Study

Summary

- *Women Are Essential to the Future of the Bicycle Movement and Industry*
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Continue the conversation

Sept 11, 2014 | Pittsburgh, Pa.

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Time for Questions!



American Bicyclist Study
Metro Urban Report
Used Bike Report
Path to Purchase Report

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WABA Women & Bicycles Mother's Day Ride
Photo by Maggie Smith