

Women Bike



Women Bike will empower more women to bicycle and become engaged in the diverse leadership opportunities of the bicycle movement through networking, knowledge sharing, resources and inspiration.

Events | Resources | Webinars | Community | Leadership development

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Women Mean Business: The Economic Impact of Women Bicyclists!

February 27, 2013

**American Bicyclist Study Webinar
Produced by the Gluskin Townley Group LLC
For
The League of American Bicyclists**



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

The Economic Impact of Women Bicyclists

Insight from the 2012
American Bicyclist Survey



Photo by Cameron Adams

FREE Women Bike Webinar | Wed, Feb 27 | 2 p.m. Eastern



Webinar Agenda

1. The New American Bicycle Market
2. Current Economic Impact of Women
3. The Endemic Prejudice
4. "...demographics are destiny"
5. Future Economic Impact of Women
6. Questions



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The New American Bicycle Market

“...an America where Latinos, Asians, African Americans and women make up a broad demographic coalition.”

Bicycle Retailer And Industry News
Staff Editorial December 1, 2012 Print Issue

And Add Young People!



The New American Bicycle Market

2011

**Total 2011 U.S. Bicycle Riding
Participants = 39,567,000**

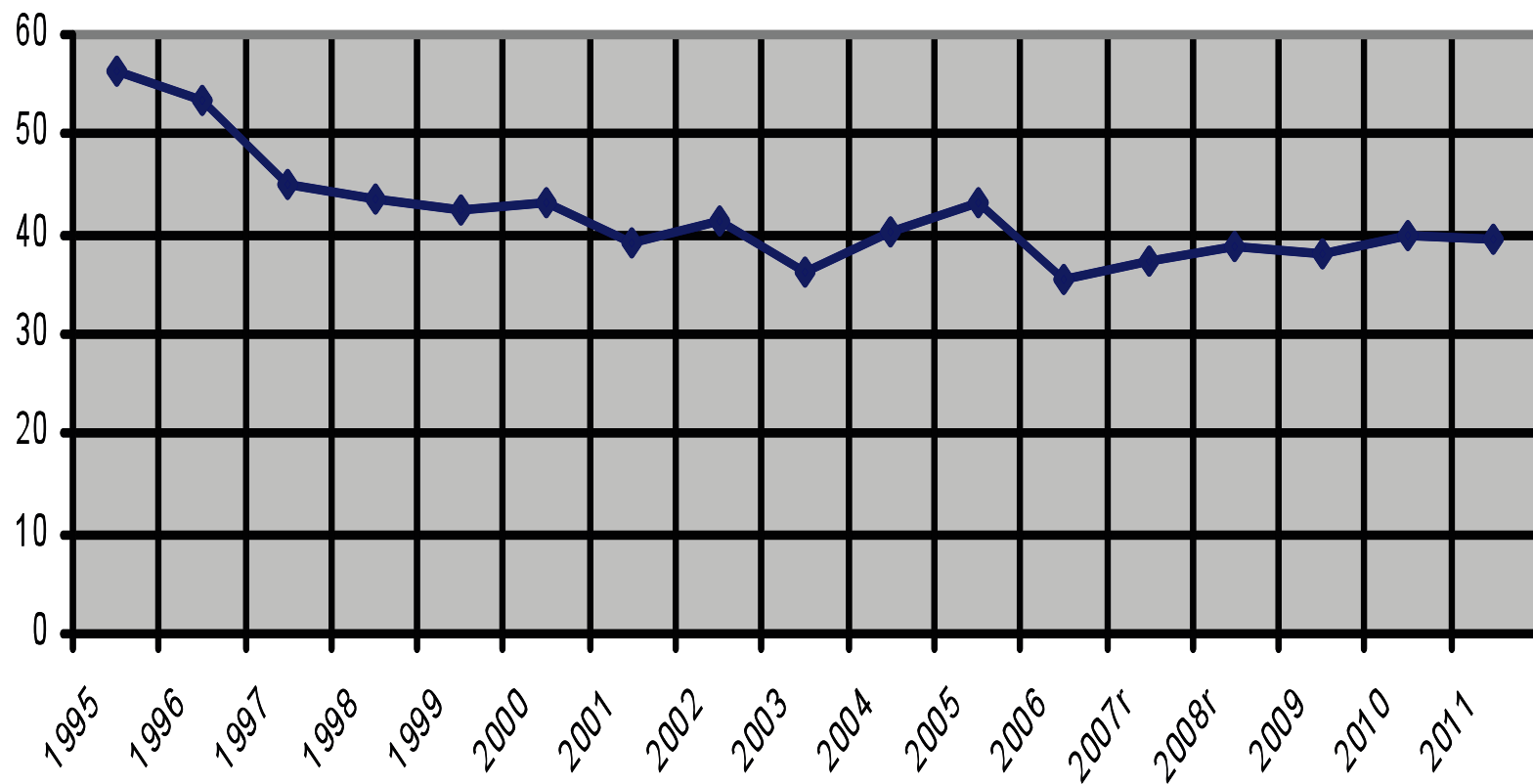
13% Percent of Total U.S. Population

Source: National Sporting Goods Association (NSGA)



U.S. Bicycle Market History of Bicycle Riding

All Bicycling Participants (nos. in mil) 1995-2011





The New American Bicycle Market

2011

Adult Bicycle Riding Participants = 24,927,201

63% Percent of Bicycle Riding Participants

8% Percent of Total U.S. Population

Source: National Sporting Goods Association (NSGA) and Gluskin Townley Group Analysis



The New American Bicycle Market

2011

Adult Male Bicycle Riding Participants = 13,460,693

34% Percent of U.S. Bicycle Riding Participants

54% Percent of U.S. Adult Bicycle Riding Participants

4% Percent of Total U.S. Population

Source: National Sporting Goods Association (NSGA) and Gluskin Townley Group Analysis



The New American Bicycle Market

2011

Adult Female Bicycle Riding Participants = 11,466,517

29% Percent of U.S. Bicycle Riding Participants

46% Percent of U.S. Adult Bicycle Riding

4% Percent of U.S. Population

Source: National Sporting Goods Association (NSGA) and Gluskin Townley Group Analysis



The New American Bicycle Market

2011

American Bicyclist Study

**U.S. Adults who currently own any
bicycle that they purchased either
new or used =**

25,352,000

8% of U.S. Population

Source: Gluskin Townley Group American Bicyclist Study



The New American Bicycle Market

2011

American Bicyclist Study

**U.S. Adults Women who currently own
any bicycle that they purchased either
new or used =**

12,389,000

4% of U.S. Population

Source: Gluskin Townley Group American Bicyclist Study



The New American Bicycle Market

- Women Are The New Majority



BBC News 7 November 2012



The New American Bicycle Market



The Importance of Women as a Generational Force in Bicycling

Generation Y	Generation X	Baby Boomers
61%	44%	50%



The largest generation of Americans in history with 100 million strong by 2022!



Currently in control of the U.S. marketplace for bicycles!



Enabled the U.S. Bicycle Industry to grow, influenced the Bike Boom of 1972-1975



The New American Bicycle Market



The Importance of Women as a Force in Bicycling

Enthusiasts	Moving Ups	Casuals	Infrequents
21%	49%	40%	60%



The consumer group with the most influence on the Specialty Bicycle Retail Channel



Closely aligned with Enthusiasts but ride less, spend less, and visit bike shops less



Enjoy riding when they are able, look for good deals AND an excellent shopping experience. Might consider IBD if recommended by friend

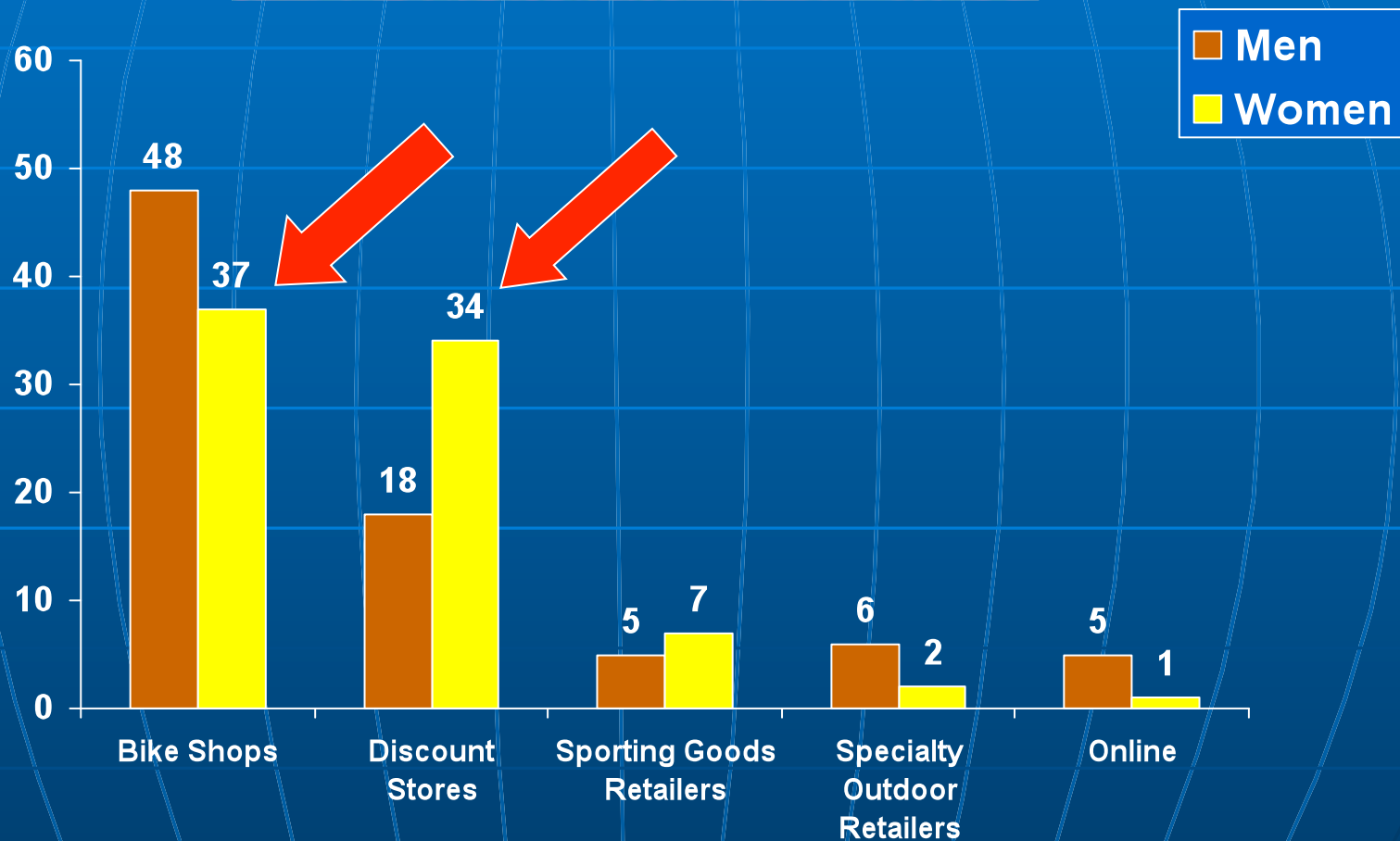


Ride very infrequently due to family and time constraints, when shopping they go where they can get a good deal AND a good shopping experience



New American Bicycle Market

Favored Retail Channels for Recent Bicycle Purchases



Percent of Adult Bicycle Owners Who Made Recent Bicycle Purchase

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.



New American Bicycle Market



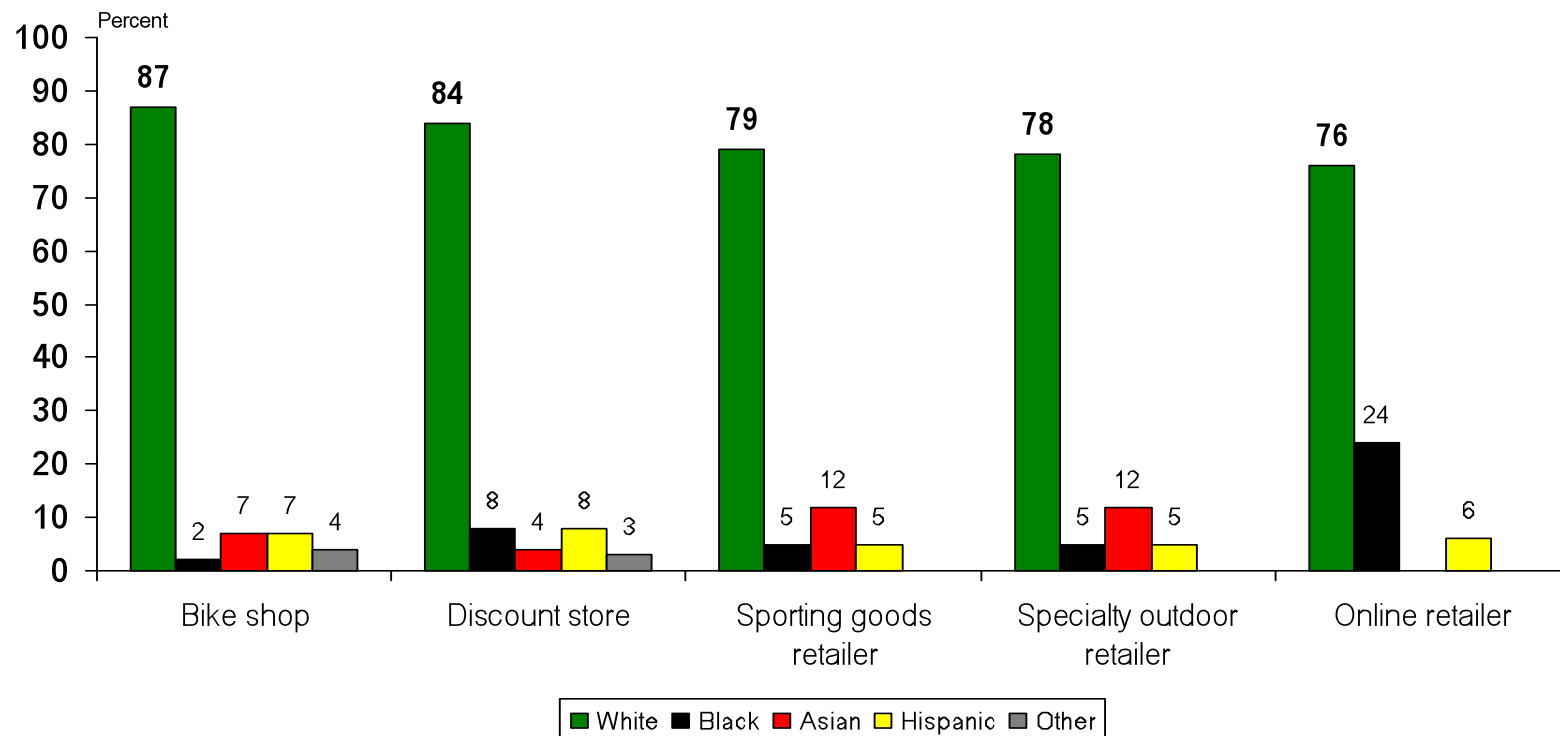
Race	2000	2010	Change
White	75%	72%	5.7%
Hispanic / Latino	12.5%	16%	43.0%
African American	12%	13%	12.3%
Asian	4%	5%	43.3%



New American Bicycle Market



Retail Channel Where Most Recently Bought New/Used Bicycle by Race/Ethnicity





The New American Bicycle Market Young People!

		Baby Boomers			Generation X			Generation Y		
Year Born		1945	To	1964	1965	To	1984	1985	To	2004
Number of Americans		78 Million			69 Million			100 Million		
		Age Range			Age Range			Age Range		
Year										
2013	Now!	68	to	49	48	to	29	28	to	9
2016	In 4 years	71	to	52	51	to	32	31	to	12
2020	In 8 years	75	to	56	55	to	36	35	to	17
2022	In 10 years	77	to	58	57	to	38	37	to	19
	Mean		68			48			28	

Source: *Deliver Magazine*; The U.S. Postal Service; *The Age Curve* by Kenneth W. Gronbach



Current Economic Impact of Women

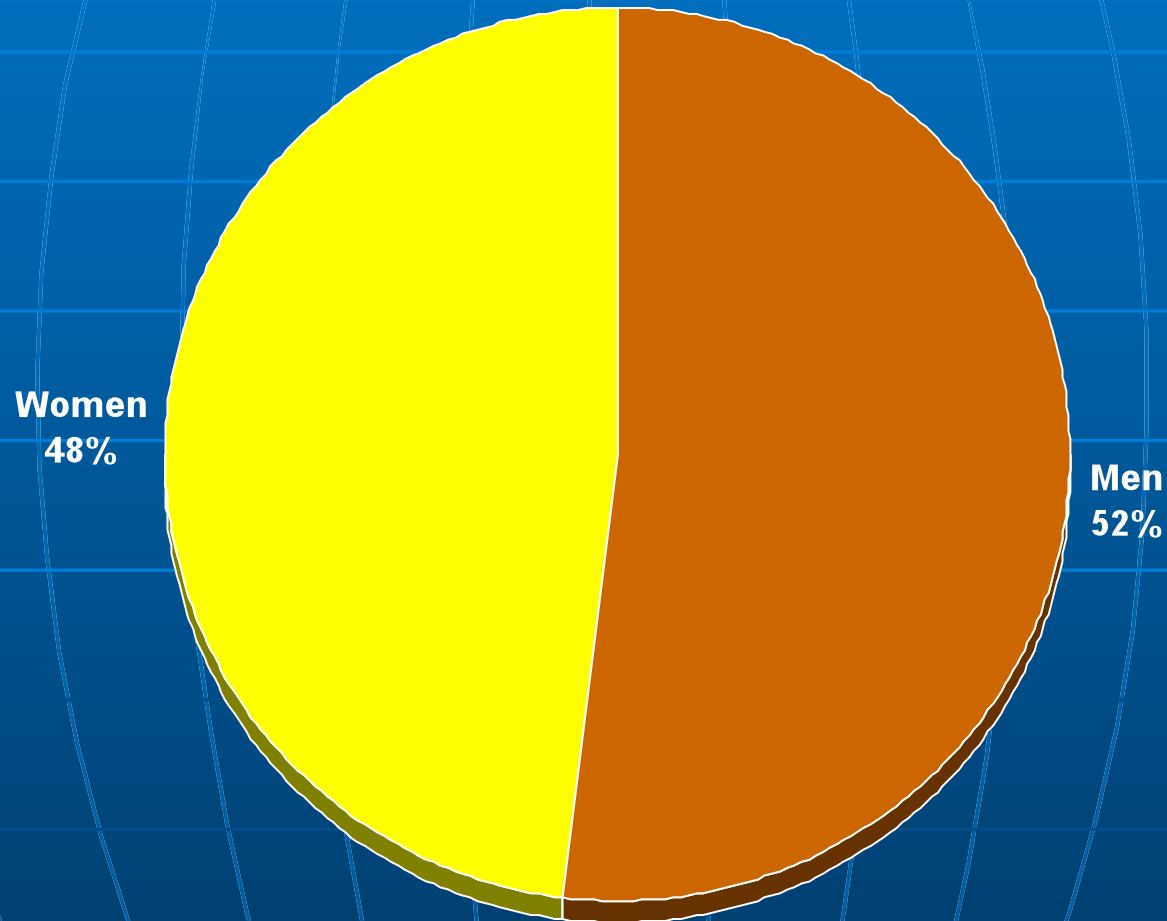
2011

Women are estimated to have captured 37% of the total U.S. Bicycle Market of \$6 billion in direct effect retail dollars, or \$2.3 billion

Source: Gluskin Townley Group Analysis



Women Make Up a Potent Economic Force in Bicycling

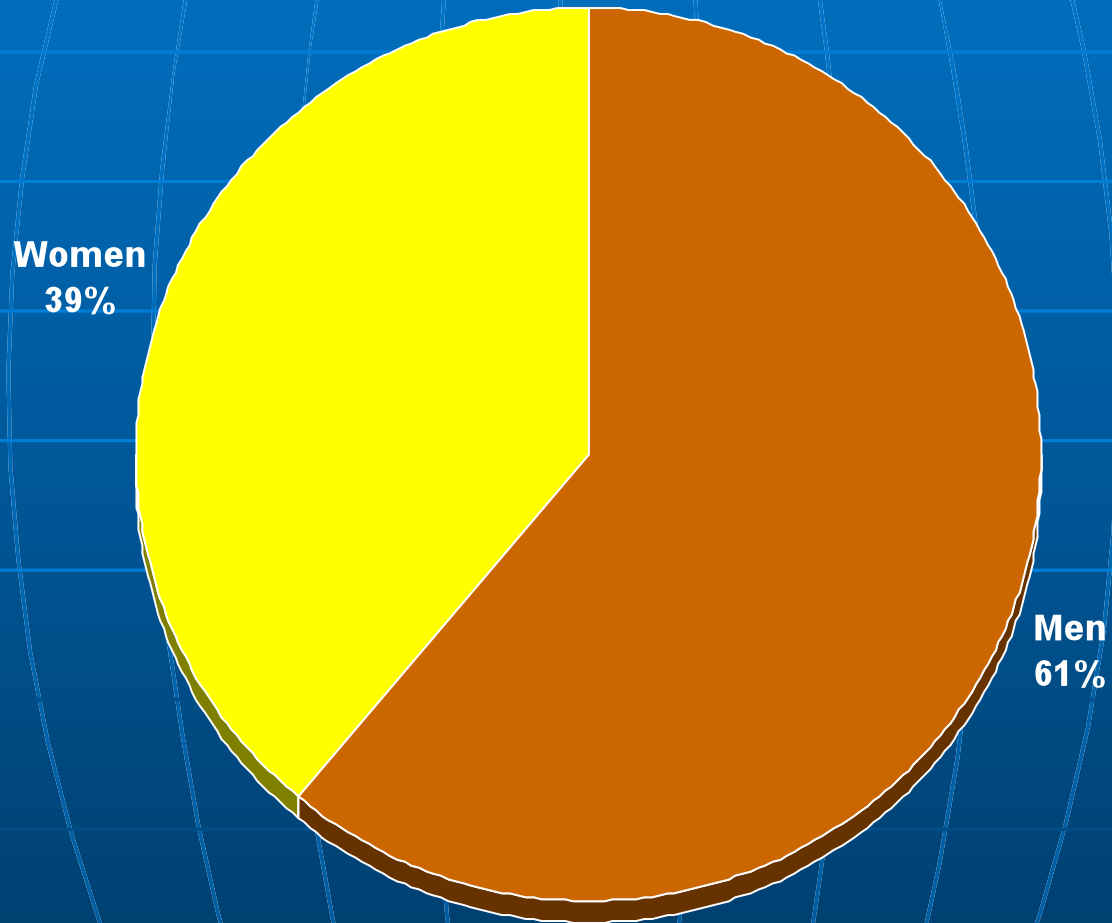


Percent of Adult New Bicycle Buyers

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.



Women Make Up a Potent Economic Force in Bicycling

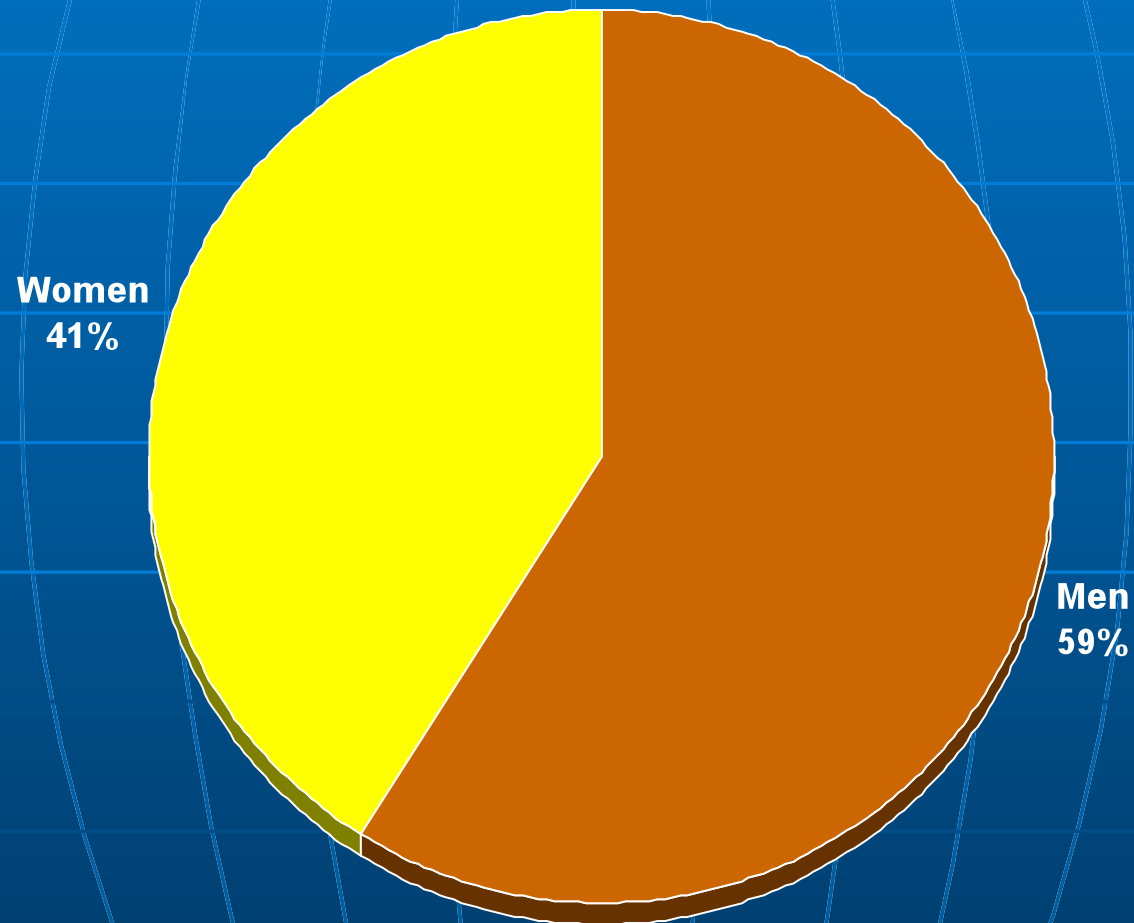


Percent of Adult Used Bicycle Buyers

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.



Women Make Up a Potent Economic Force in Bicycling

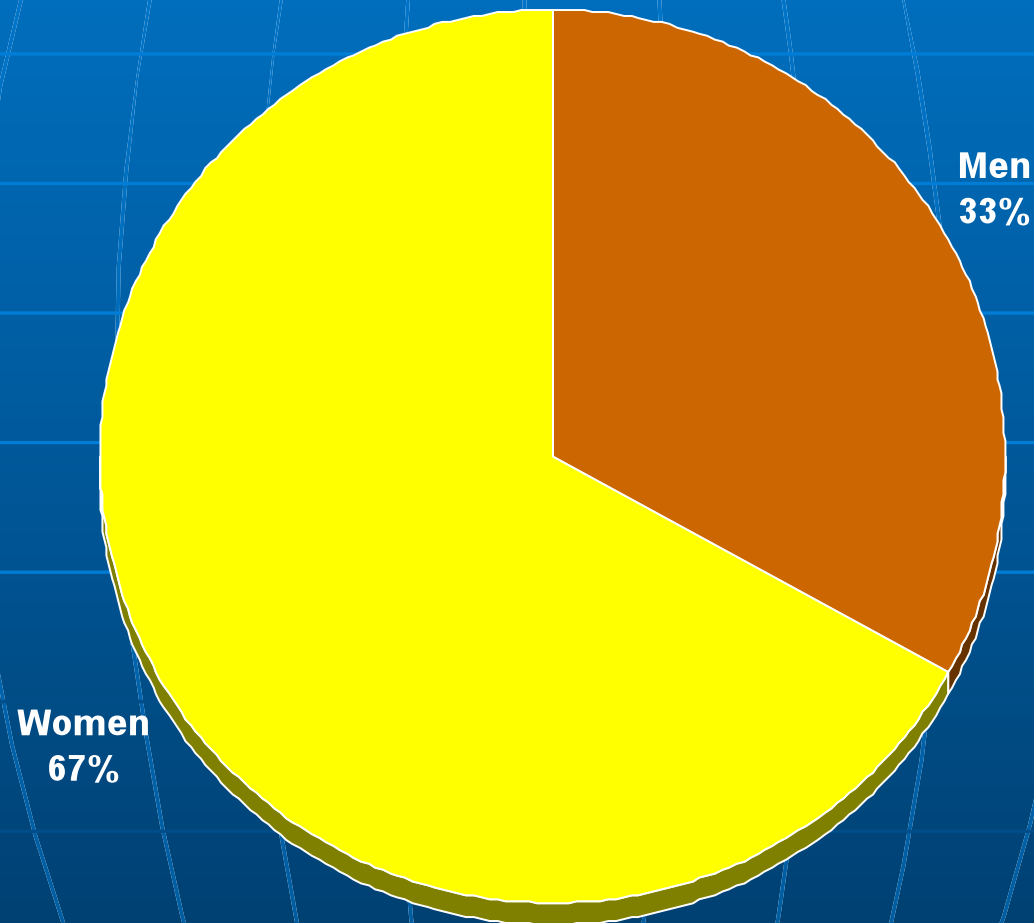


Percent of Adult Bicycle Owners Planning to Buy a New Bicycle

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.



Women Make Up a Potent Economic Force in Bicycling

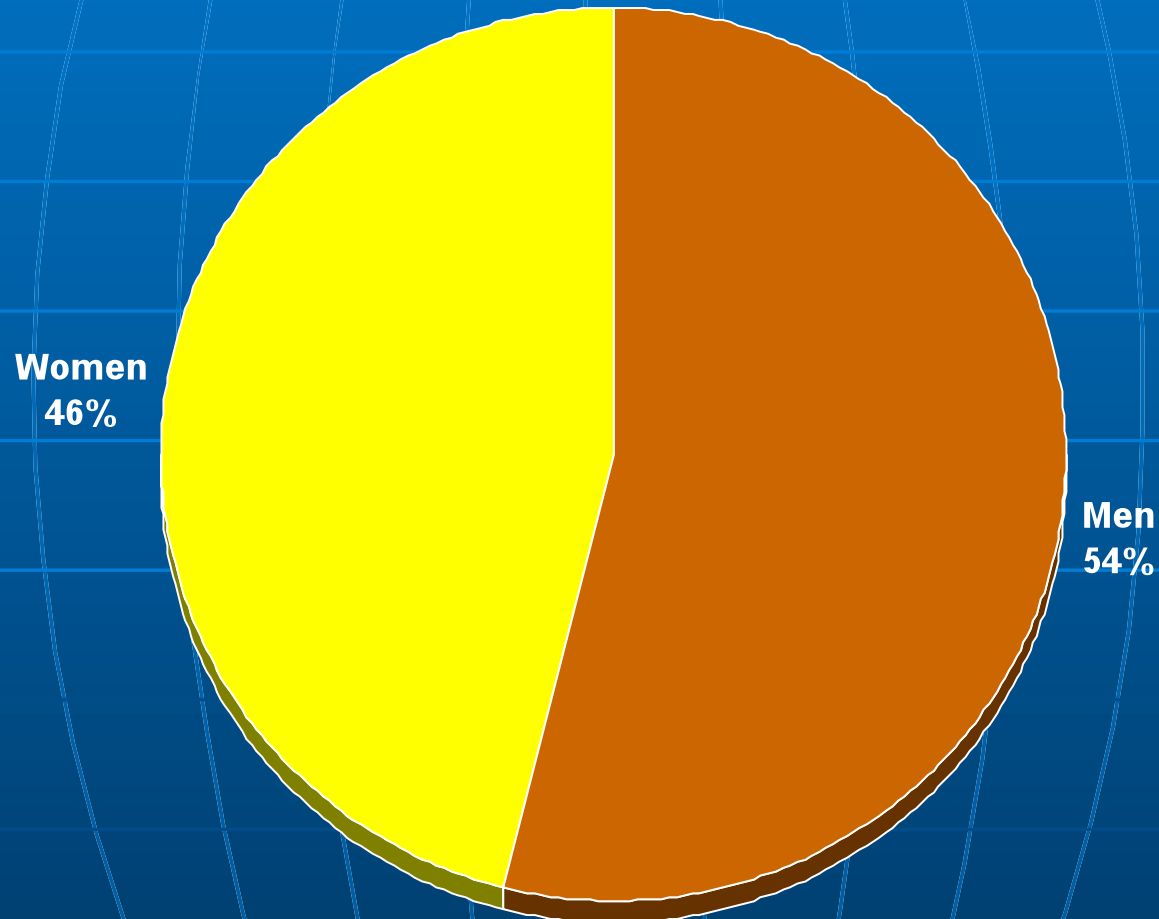


Percent of Adult Bicycle Owners Planning to Buy a Used Bicycle

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.



Women Make Up a Potent Economic Force in Bicycling



Percent of Adult Bicycle Owners Planning to Buy Any Cycling Products Excluding Bicycles

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.



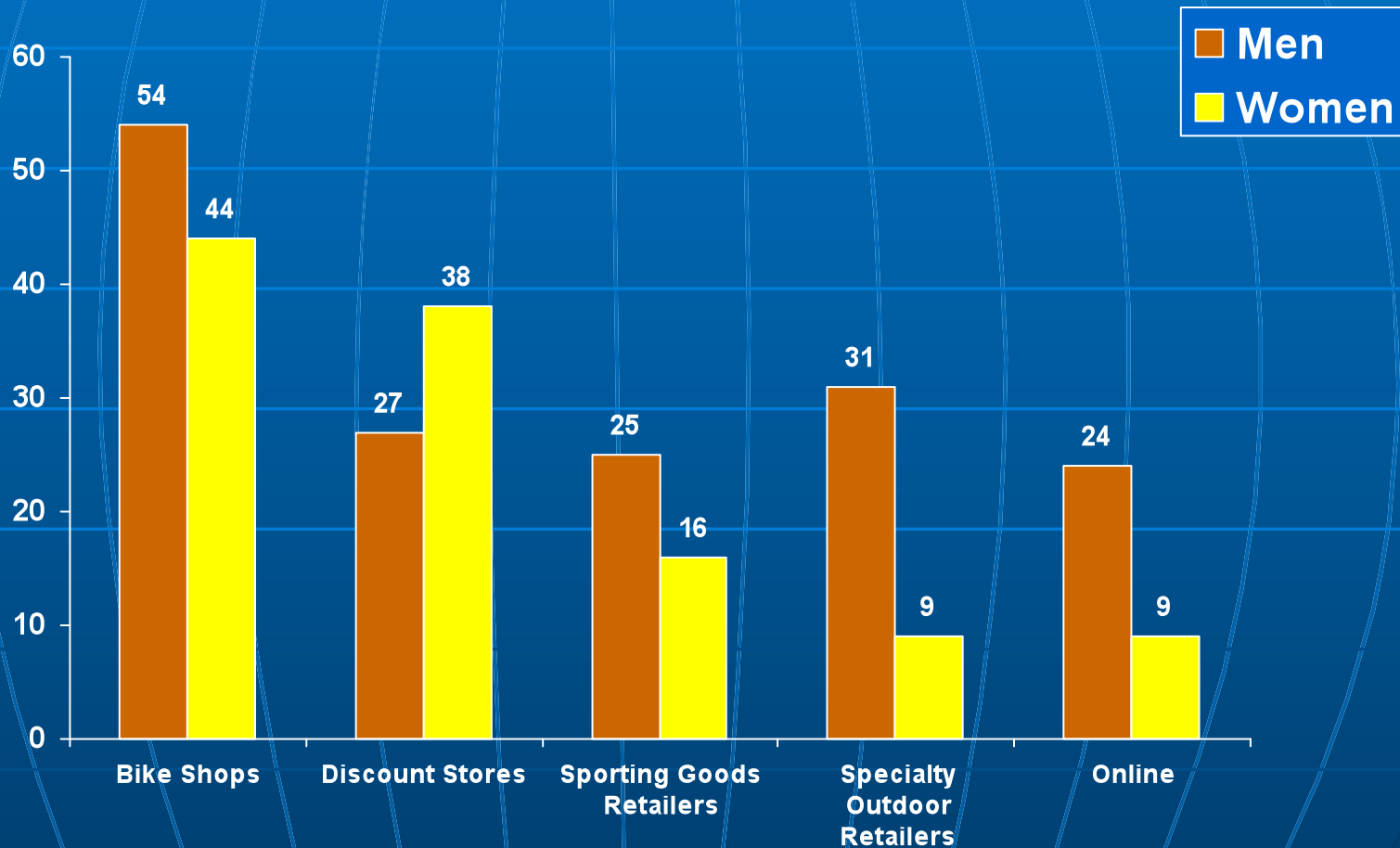
Women Make Up a Potent Economic Force in Bicycling

Of the **\$6.8 billion** planned to spend on bicycles and related purchases, women may account for **\$3.50 of every \$10** or **\$2.4 billion** in spending!

...and it could be more...much more!!



Where Women are Planning to Buy



Percent of Adult Bicycle Owners Planning to Buy From Key Retailers

Source: The American Bicyclist Study conducted in 2012 by the Gluskin Townley Group.



The Endemic Prejudice

The Endemic Prejudice...that keeps the American Bicycle Movement from becoming great!





Retail Experience





Retail Experience

The Novice's Problem Journey

Something challenging



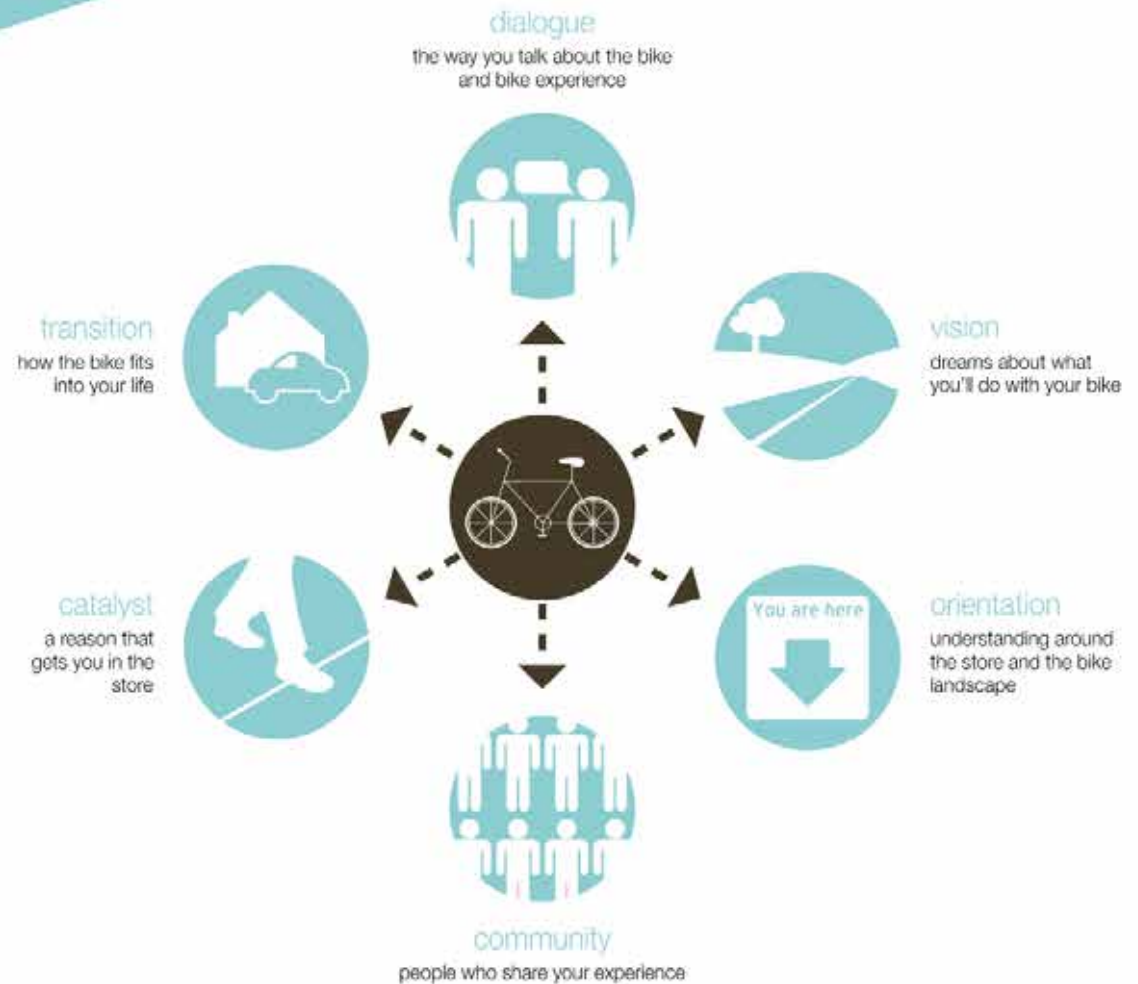
A background image showing a person's hands using a tool to work on a bicycle. The image is partially obscured by a white, torn-edge shape that contains the text.

Issues to address

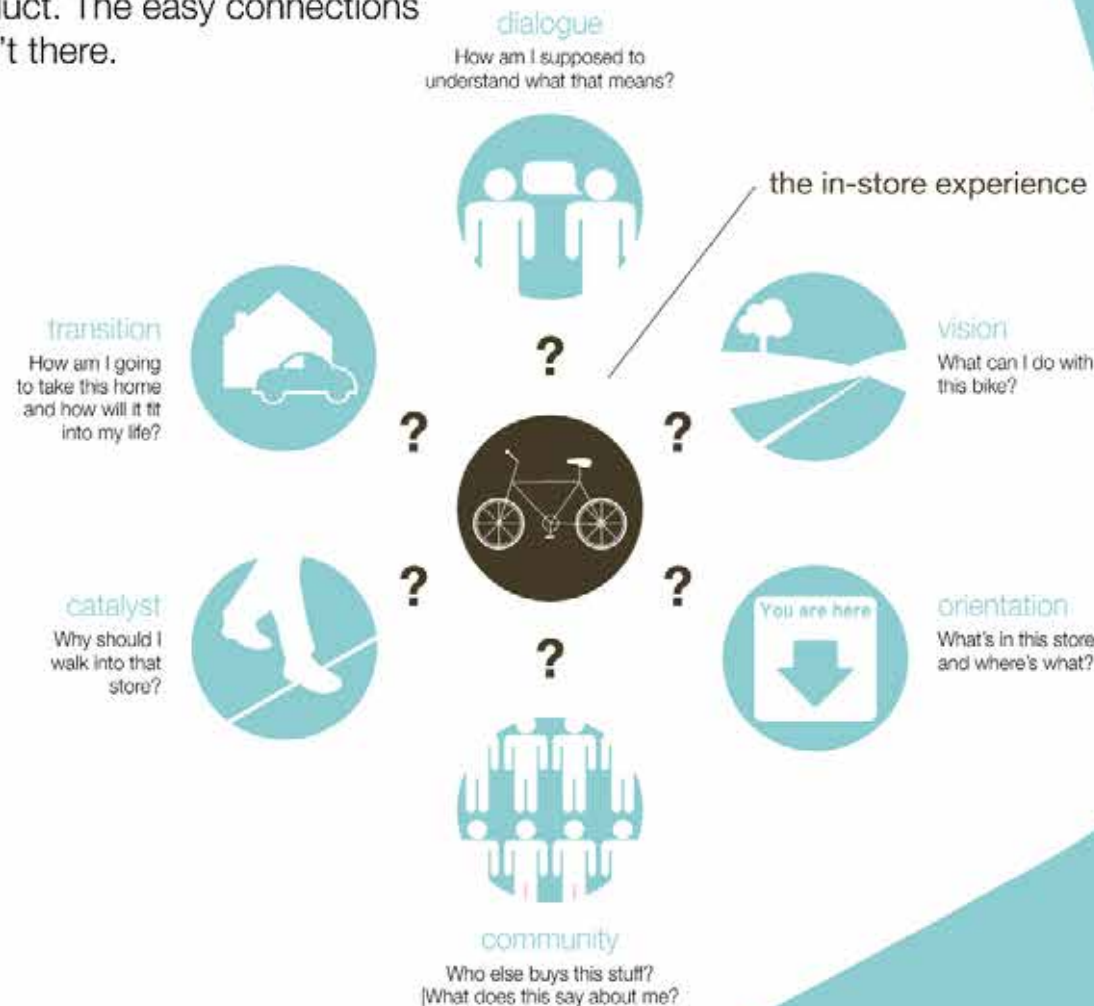
Considerations for
the store beyond the
bike product

The big picture

When the “expert” sees a bike in a store, he/she automatically links it to all the other stuff that completes the experience. This comes from experience, product knowledge, exposure to bike marketing and his community of riders.



When a novice sees a bike in a store, they don't have the knowledge, history or expertise to make those critical links between the bike and "everything else" - so usually, they just see a pretty challenging, hard-to-engage product. The easy connections aren't there.



The big picture

The big picture

We think the big opportunity lies in creating an experience that is inclusive of all the “components” of the bigger picture - and bringing it all in-store. If you don’t provide these things along with the product itself, you can’t connect to the novice user.

store experience





The Economic Impact of Women Bicyclists

“...demographics are destiny”



The Economic Impact of Women Bicyclists

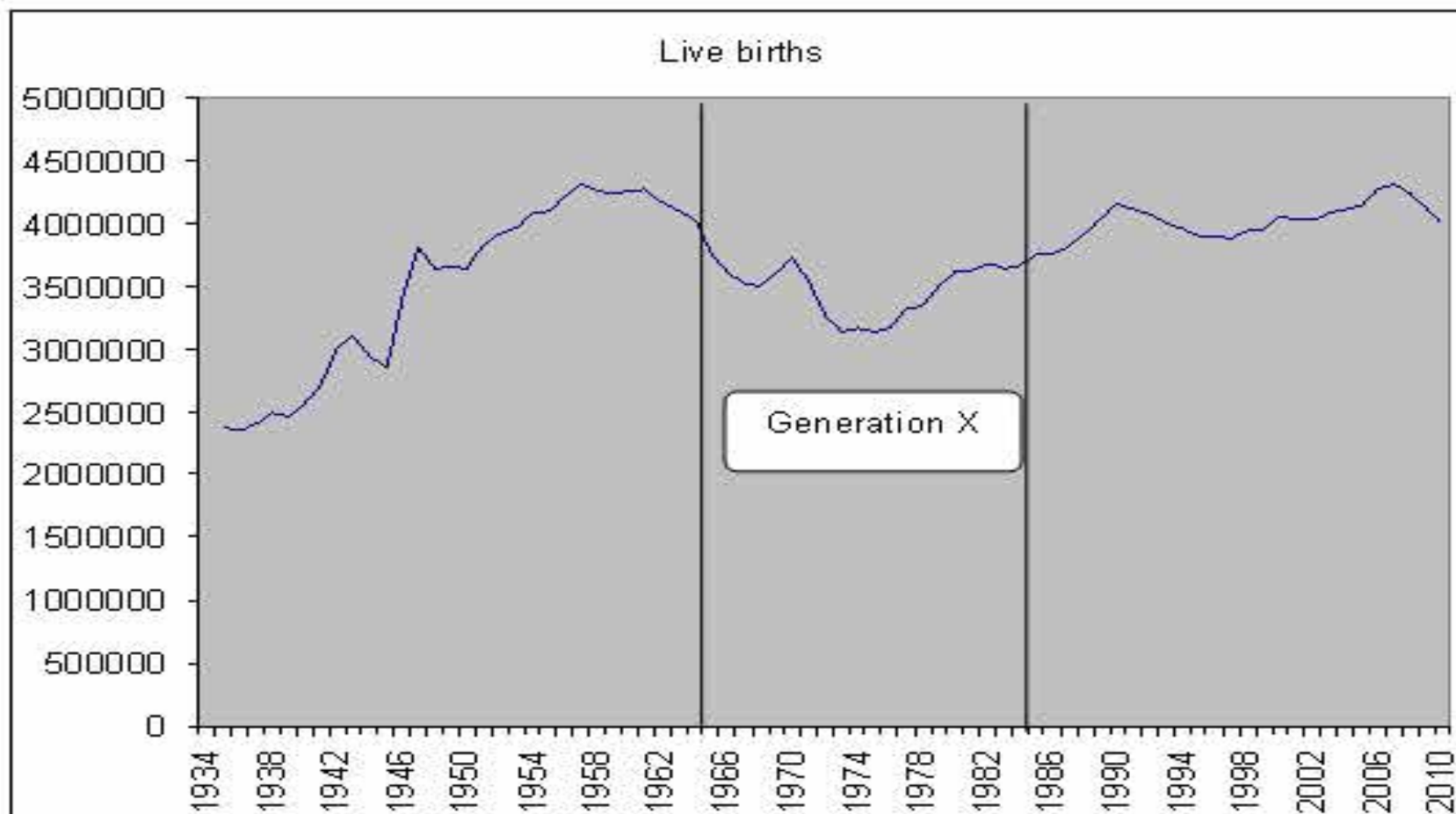
“My message was really about the long haul, you know, demographics are destiny, and if you just ignore it, you do it at your peril.”

Jeb Bush, former Governor of Florida



The 11% Factor

U.S. Live Births 1935 to 2010



Source: U.S. Census Bureau



Future Economic Impact of Women

- 2013 to 2020 – 7 years from now
- 2013 to 2023 – 10 years from now
- 2013 to 2028 – 15 year from now



U.S. Adult Women Bicyclists
1990 compared to 2011
Percent of All Adult Female Cyclists and Percent of All
Adult Females
(In Thousands)

	1990			2011		
Segment	1990	% Adult Female Cyclists	% All Adult Women	2011	% Adult Female Cyclists	% All Adult Women
All Female Cyclists (18+)	16,592	100%	17%	12,389	100%	10%
Female Enthusiasts (18+)	202	1%	0.2%	743	6%	1%
Female Moving Ups (18+)	785	5%	1%	1,487	12%	1%
Female Casuals (18+)	3,098	19%	3%	2,354	19%	2%
Female Infrequents (18+)	12,507	75%	13%	7,805	63%	7%
All U.S. Women (age 18+)	96,322		100%	118,893		100%

Source: Gluskin Townley Group American Bicyclist Study



U.S. Adult Women Bicyclists
1990 compared to 2011

All Adult Female Cyclists as a Percent of All Adult Females
(In Thousands)

<u>Segment</u>	1990			2011		
	1990	% Adult Female Cyclists	% All Adult Women	2011	% Adult Female Cyclists	% All Adult Women
All Female Cyclists (18+)	16,592	100%	17%	12,389	100%	10%

Source: Gluskin Townley Group American Bicyclist Study



U.S. Adult Women Bicyclists
Projected Increase in 2011 by 7 Percent to 1990 Level
(In Thousands)



Segment	1990			2011		
	1990	% Adult Female Cyclists	% All Adult Women	2011	% Adult Female Cyclists	% All Adult Women
All Female Cyclists (18+)	16,592	100%	17%	12,389	100%	10%
Increase 2011 by 7%				8,616		
Total				21,005		17%
2011 Est. Rev Bikes				\$1.97 bil		
7% Unit Increase =				\$1.29 bil		
Projected Total				\$3.26 bil		



Summary

1. The New American Bicycle Market
2. Current Economic Impact of Women
3. The Endemic Prejudice
4. "...demographics are destiny"
5. Future Economic Impact of Women



Women Mean Business: The Economic Impact of Women Bicyclists

QUESTIONS?



Contact Us

Call or email us!

Elliot Gluskin – 610.624.1690
elliot@gluskintownleygroup.com

Jay Townley – 608.666.2062
jay@gluskintownleygroup.com

For more information, please visit our website:
www.gluskintownleygroup.com



Thank You!

Women Bike

3 Ways to Get Involved

**1) Attend the National
Women's Bicycling Forum**
bikeleague.org/womenbike

2) Subscribe to our E-news
bikeleague.org/womenbike

3) Join our community
[@womenbike](https://facebook.com/WomenBike)

Questions?
carolyn@bikeleague.org
(202) 621-5452

