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## **WOMEN – Who cares ?**

By Henrik Jul Nielsen, Nielsen Innovation SARL

In some segments of the bicycle market more than 70% of the customers are women. The average for the European Bicycle market comes close to 50%. When you look at the process in which most new bicycles are created you can get the feeling that the needs of a large group of customers are left unsatisfied: Bicycles are created by men, for men – and in some cases adapted to women. They are generally sold by men, in shops created by men for men. Women entering a bicycle shop, looking for a new, fashionable smart bike that suits her needs for practical transportation, will typically be met by a 50 years old guy with oily hands, speaking a funny Shimano dialect. No wonder that most women ask their husband to take care of the service and maintenance of their bike...

It is often argued that the bicycle industry has many resemblances with the fashion and ready-to-wear industries in terms of renewal of colors and collections - and relocation of manufacture to Asia. But some differences are striking: The bicycle industry has, despite a clear distinction of products for men and women, only to a very little extent, managed to create products to the specific needs and desired of the two sexes. This is striking because the bicycle is a personal product and most bicycles are sold as either a ladies bike or a man's bike – in opposition to the car which in most cases is to be used by both sexes.

### ***Need – Desires - Demand***

When creating new products (whoever the target group is) it is useful to distinguish between the needs and the desires of the potential customers. The needs are unsatisfied situations and they are rationally understood (better suspension, less maintenance, lighter design...). The desires are emotional and much more complex to understand and describe. Nevertheless the factors are often more important when the customer chooses a new product. Factors such as prestige, fun and fashion are important elements. The authors have been applying their "Needovation"<sup>®</sup> tool (see illustration) to various industries to increase the added value of the products. The ultimate goal is to distinguish the need and desire attributes of the product which helps to increase the demand in the market. This is done through a breakdown of the need and desires attributes and a matching with value generating solutions. When analyzing the needs and desires attributes it is important not only to focus on the product itself, but also to look at how value can be added in all stages of the products life: Display in the shop, Selling, Delivery, Use, Transportation, Options, Disposal etc. Doing this can generate strong value-adding new concepts.

### ***Women's Needs***

The understanding of women's rational needs, in relation to bicycles, is quite straightforward. and well understood. According to a survey in the NGSA (National Sporting Goods Assoc., USA) newsletter of the 14<sup>th</sup> May, 21%, of the 554 female

cyclists interviewed, reported “saddle fit” as their no. 1 frustration. No. 2 was Comfort (clothing at 14%) and other fit (frame/bike at 13%) came in 3<sup>rd</sup>. Social issues such as finding other women to ride with as well as safety issues of riding alone and inconsiderate motorists add to their frustration.

Looking at the saddle, there are major differences in how men and women sit on a bike. The most obvious is the pelvic structure. A woman’s hips are wider, and the bony protuberances we all sit on, called ischial tuberosities, are also wider apart. This means that women needs saddles that are wider in the back than a man’s. Women’s pelvic structure does not allow them to roll as long forward on the saddle as men without hurting, which again means a more upright driving position. Adding this to the fact that women in general have shorter torsos, shorter arms and longer legs for the same total height, means that women’s bicycles shall have a slightly different geometry. Women’s bikes shall have a shorter frame and a more upright driving position with the handlebars positioned higher (taller head tube, shorter top tube). This driving position reduces the weight on the front wheel, which again means less steering stability. To achieve the same steering stability as for the same type of men’s bike, a longer trail on the front wheel is needed. Therefore the head angle should be decreased slightly. Other morphological differences imply smaller brake levers, narrower handlebars and for some types of bikes, smaller wheels.

The use of the bike should also be considered. On average, women do not use the bike for the same purposes as men. In the city women are more likely to use it for shopping, which again means easy stopping, easy locking and easy carrying of the goods bought in the local supermarket. For leisure and sport, women tend to be less aggressive in their way of driving and will in general appreciate a higher degree of comfort.

The second problem, comfort and clothing, has in all centuries been a big obstacle for women’s individual transportation. Horse riding and bicycling with long skirts has always been a problem. Women’s shoes and modern pedals are not that compatible either. It is interesting to observe, that with the mountain bike - created in the late 70’ties, immediately after the big feminist movements – women started to ride the same bikes as men, and in some cases wear similar clothes. The women adapted more to the bike than the bike adapted to the women... If there is a trend today, it is probably that women are respected for being women. This again requires a better understanding of what different types of women want to express when they ride a bicycle.

### ***Women’s desires (in relation to bicycles... )***

What do women dream about ? Creating new bikes for women requires an understanding of what affective values women associates with the bicycle. What makes people like, or not like, a product can be just as difficult to understand as to understand why two people like each other... Even with a psychoanalytical approach there will be a lot of uncertainty left. But this should not be an excuse for not trying. As for human beings, some of the means for attracting other people are known and can be used when creating new products. What is the reason for instance, that men’s saddles are longer than women’s ?

In terms of bicycles, factors such as colors and texture of the materials, styling of the bike and the components, choice of equipment etc. are important factors. Now, all women are not the same (unfortunately for the product innovator and fortunately for men in general... ) and this leaves, of course, a lot of uncertainty and difficulties in the choice of product attributes. Women are in some regards more pragmatic than men. Whereas men may be attracted by fancy looking gear shifters with dials indicating the exact position of the front and rear derailleurs (impression of technology and control), most women probably see these more as irritating gadgets. A handlebar with exclusive materials with smart holder for the mobile phone and other small belongings will certainly add more to the perceived value of a ladies city or leisure bike. A simple thing, as the fact that many women like to have long nails, should be taken into account when designing a bicycle bell...

Sometimes the needs and desires can be contradictory. In a market study carried out for electric bikes in three European countries, it was anticipated that the target group would be "women, 50+ years old". It was generally agreed that these customers would use the bike for shopping and that they would appreciate having a good basket in the front of the bike. During the study it became clear, that this type of women is constantly struggling to look younger. Instead of looking like an old woman going to the market to do her daily shopping, she would rather prefer to look young, trendy and dynamic. As a conclusion, adding the shopping basket to the bike would reduce its psychological value with about 100 Euros.

Today about 50% of the customers are women. For the bicycle industry as a whole, there is certainly a huge hidden opportunity for those who manage to create bicycles, shops and services which are more minded at women. Lets give it a try !

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### **About the authors:**

Henrik Jul Nielsen (henrik.nielsen@edicot.com), MD of Nielsen Innovation SARL. Nielsen Innovation is an international consulting company specialized in Innovation Management (Strategy, Design, Marketing and R&D).

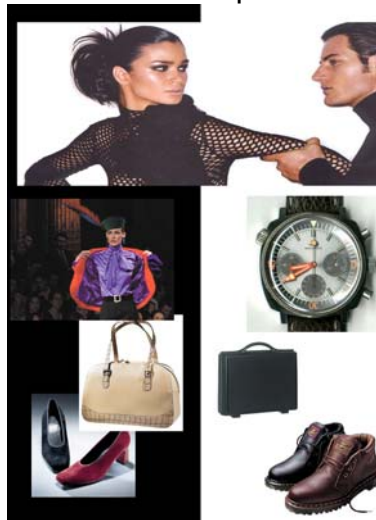
Henrik has in his career created numerous successful New-To-The-World products for different industries. He has a PhD in Innovation Management and has worked several years in the home appliance industry and in the bicycle industry as Group R&D and Product Co-ordination manager for the Cycleurope Group.

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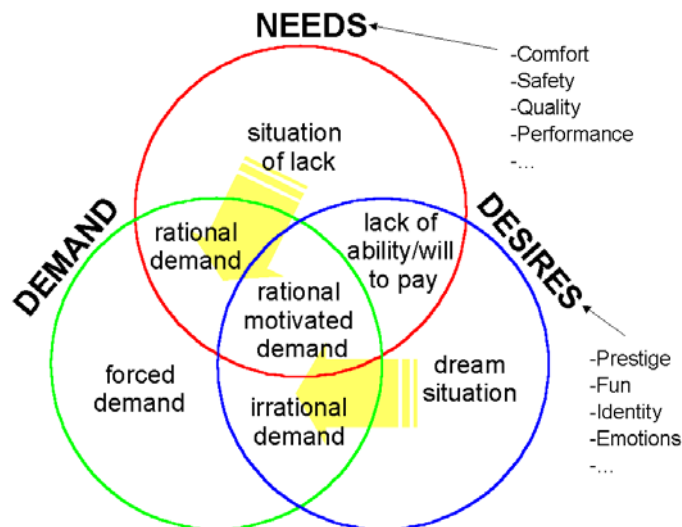
Figures:



1. "Find one difference !" - A sloping toptube is the only adaptation some bicycle companies have made in terms of adaptation to women's needs.



2. Do modern bicycles express the real differences between men's and women's needs and desires ?

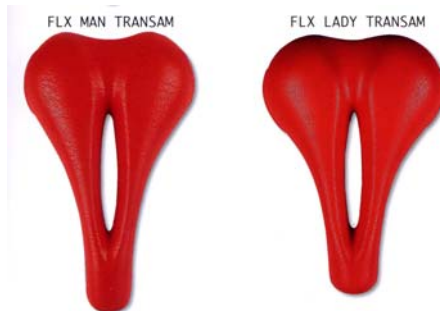


3. "NEEDOVATION"<sup>®</sup> A tool developed by Henrik Nielsen to optimize the total business and the demand in the market when creating new products. For each product attribute new solutions are sought to better satisfy the customers

needs and desires. The cost and created value is evaluated for each attribute to assess the attractiveness of the product in the market.



4. Understanding what image the customer wants to express is essential for increasing the products affective value.



5. Women's saddles are wider because women have wider hips and their ischial tuberosities (sit bones) are also wider apart. The weight distribution is not the same as for men: women tend to have a higher load on the rear part of the saddle (hips) and a lower load at the front part (ischial tuberosities). Women often reject light colours (for good reasons...) and do not associate any value with long saddles... Photo: Selle Italia FLX Transam Man and Lady

More photos should be added:

(Gazelle 24"/26", Kildemoes, Riese und Müller - Avenue, National BI – "First Lady"... )

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