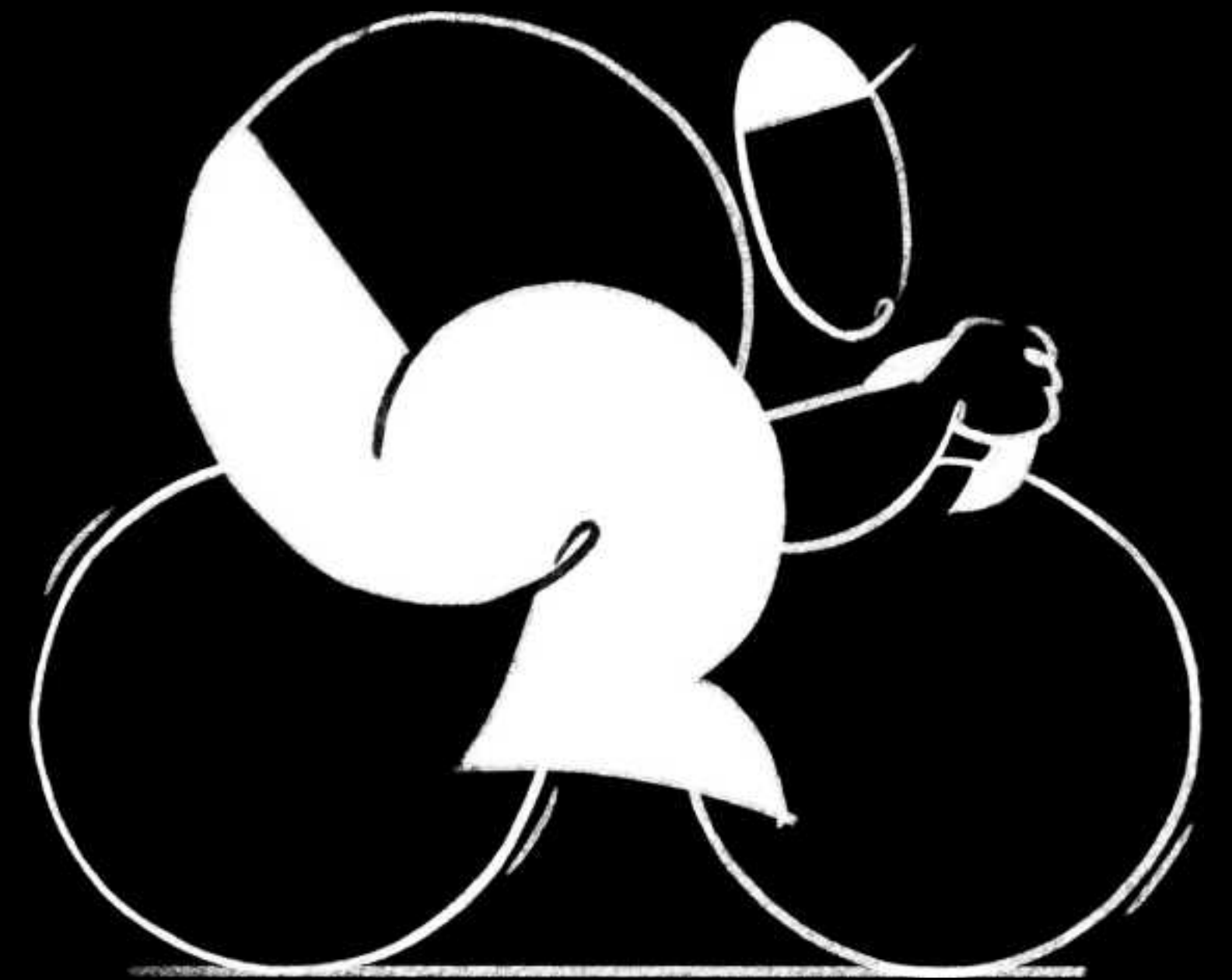


AColorBright *Insights*

Decoding next-gen Cycling Brands



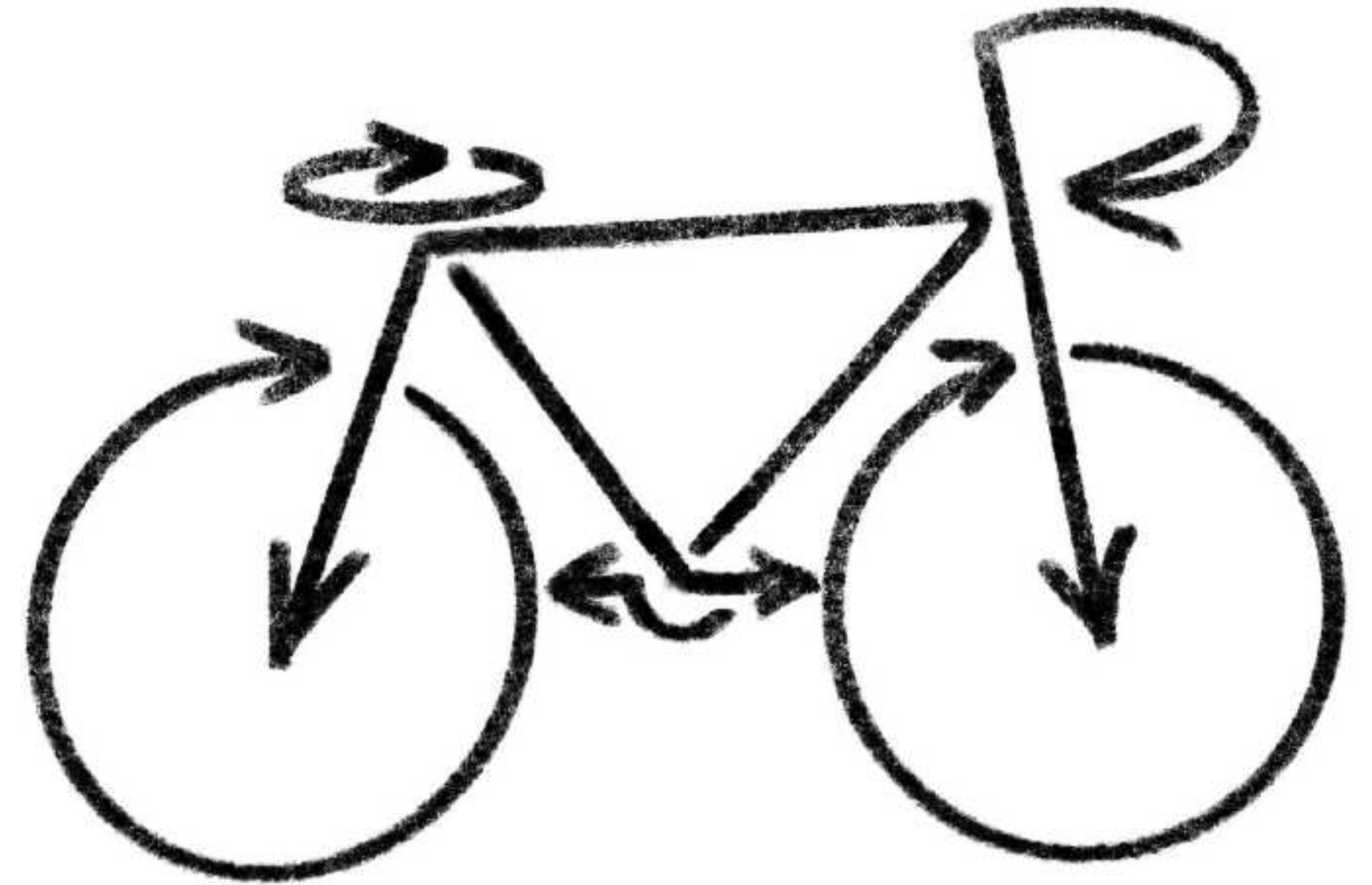
All maps are wrong; some are useful

Brand maps are an long established tool for marketeers to analyse competition. Like every single map in the world, they're wrong by definition. But they're still helpful. They reduce complexity and help us see bigger patterns.

For our design maps, we systematically analyse design elements in markets and put them on a map. We scan hundreds of websites, social media assets and products to identify patterns and connect the dots.

Positioning brands in crowded markets is an art. Zooming out helps us to identify patterns of success and potential niches.

But each map also contains some insights into other markets and society at large. Successful brands reflect people's needs. The systematic analysis of brands shows us what moves consumers and what resonates in society. Each design map of innovative markets therefore also offers a new perspective on the zeitgeist.



As more people take up cycling, some brands are turning it into a premium lifestyle.

In recent years, cycling has undergone a stylish transformation, with an emphasis on quality equipment and a cultivated lifestyle. A wave of new riders have joined the movement, using their fashionable cycling gear to signal that they are part of the 'in-crew'. It's not just about the exercise; it's increasingly about being part of an exclusive community, being able to talk about the sport in obsessive detail and expressing a distinctive style.

Next generation brand leaders such as Rapha, MAAP and Pas Normal Studios are driving a movement with a strong community appeal. These brands offer exclusivity and foster a sense of commitment among their customer base, who are fully immersed in the lifestyle.


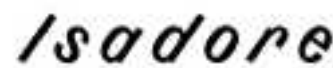





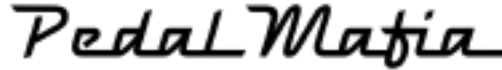












However, this level of commitment is not for everyone. Some cyclists are looking for a more relaxed vibe without the pretension. As a result, more and more brands are looking to provide cyclists with an authentic experience that gives them the freedom to express themselves.





















Cycling brands are becoming community hubs, organising rides and combining them with a coffee and retail experience in the city. Rapha pioneered this strategy and now the next generation of brands are trying to become "the new Rapha".

Source: [Komoot](#)

We decoded design patterns of 35+ next generation cycling brands

Logo	Brand name	Founding year	Headquarters				
	<u>Rapha</u>	2004	United Kingdom		<u>Isadore</u>	2013	Slovakia
	<u>Pedaled</u>	2007	Italy		<u>Q36.5</u>	2013	Italy
	<u>Babici</u>	2009	Australia		<u>MAAP</u>	2014	Australia
	<u>Café du cycliste</u>	2009	France		<u>Pedal Mafia</u>	2014	United States
	<u>Gobik</u>	2010	Spain		<u>Pedla</u>	2014	Australia
	<u>Attaquer</u>	2012	Australia		<u>Velocio</u>	2014	United States
	<u>God and famous</u>	2012	United States		<u>Void</u>	2014	Sweden
	<u>Search and state</u>	2012	United States		<u>BBUC</u>	2015	Austria
	<u>Ale</u>	2013	Italy		<u>CHPT3</u>	2015	United Kingdom
	<u>Eliel</u>	2013	United States		<u>La passione</u>	2015	Italy

The Brands

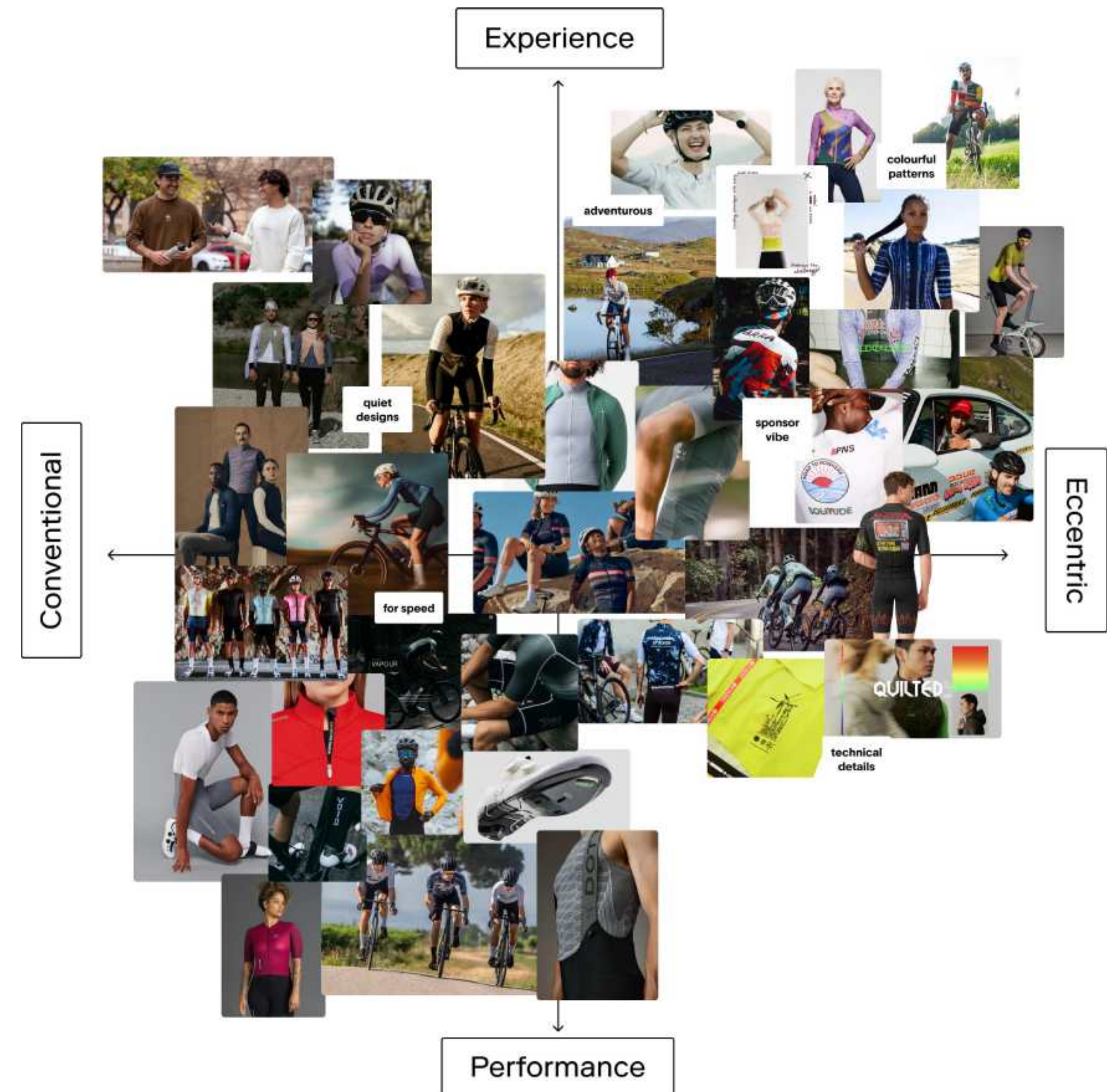
Logo	Brand name	Founding year	Headquarters				
	<u>Pas Normal Studios</u>	2015	Denmark		<u>Tan Line</u>	2018	Spain
	<u>Romance</u>	2015	United Kingdom		<u>KAMA.</u>	2019	Austria
	<u>Albion</u>	2016	United Kingdom		<u>Veloine</u>	2019	Germany
	<u>Ryzon</u>	2016	Germany		<u>Angry Pablo</u>	2020	United Kingdom
	<u>Samsara</u>	2016	Canada		<u>Rubber n road</u>	2020	United States
	<u>Trikoterie</u>	2016	Austria		<u>Universal colours</u>	2020	United Kingdom
	<u>Iris</u>	2017	Netherlands		<u>Wilma</u>	2020	France
	<u>Le braquet</u>	2018	Canada		<u>Straede</u>	2021	Germany
	<u>Ostroy</u>	2018	United States		<u>MAD.ONE</u>	2023	Danmark

The visual landscape of cycling brands

At the heart of the dynamic world of cycling brands is a fundamental question: What drives your ride? Is it the community, the adventure or a quest for a personal best? As we explore this question, let us consider how these motivations are intertwined.

We've noticed a trend where many brands are incorporating bold and eccentric prints and patterns into their jerseys. These designs are playful and appeal to cyclists who want to make a statement. In contrast, some brands are sticking to classic styles while focusing on improving product performance. Only a handful of cutting-edge 'new school' brands have managed to broaden their reach to appeal to diverse audiences by offering products that meet different needs. They effortlessly blend a range of styles and experiences, including a focus on community and high performance through their technical products.

Using the visual landscape, we explore how each brand carves out its own space, shaping the visual story of cycling in today's world.

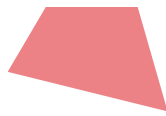


Brand map



New School

New School brands master every aspect, delivering top-notch quality products and a compelling brand experience. Their diverse product range caters to both cyclists seeking uniqueness and those aiming to blend in.



Pure Performers

Committed to authenticity and a genuine cycling experience, Pure Performers embody the essence of classic cycling apparel. They prioritise functionality and technical precision in the creation of high performance products.



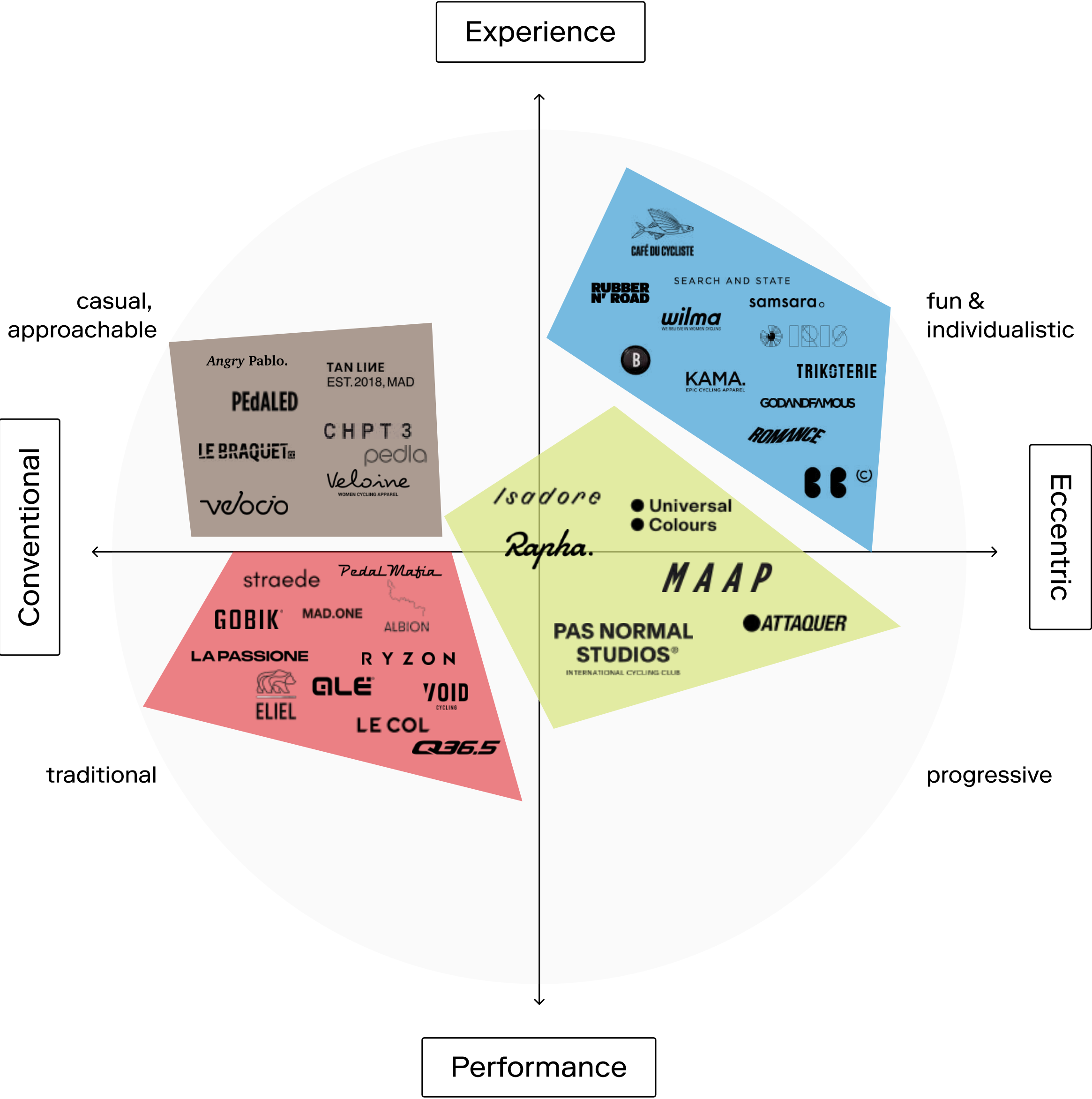
Quirky Cruisers

Quirky Cruisers redefine cycling with a unique flair that resonates with their niche community. These brands offer an alternative cycling experience that appeals to riders who value individuality.

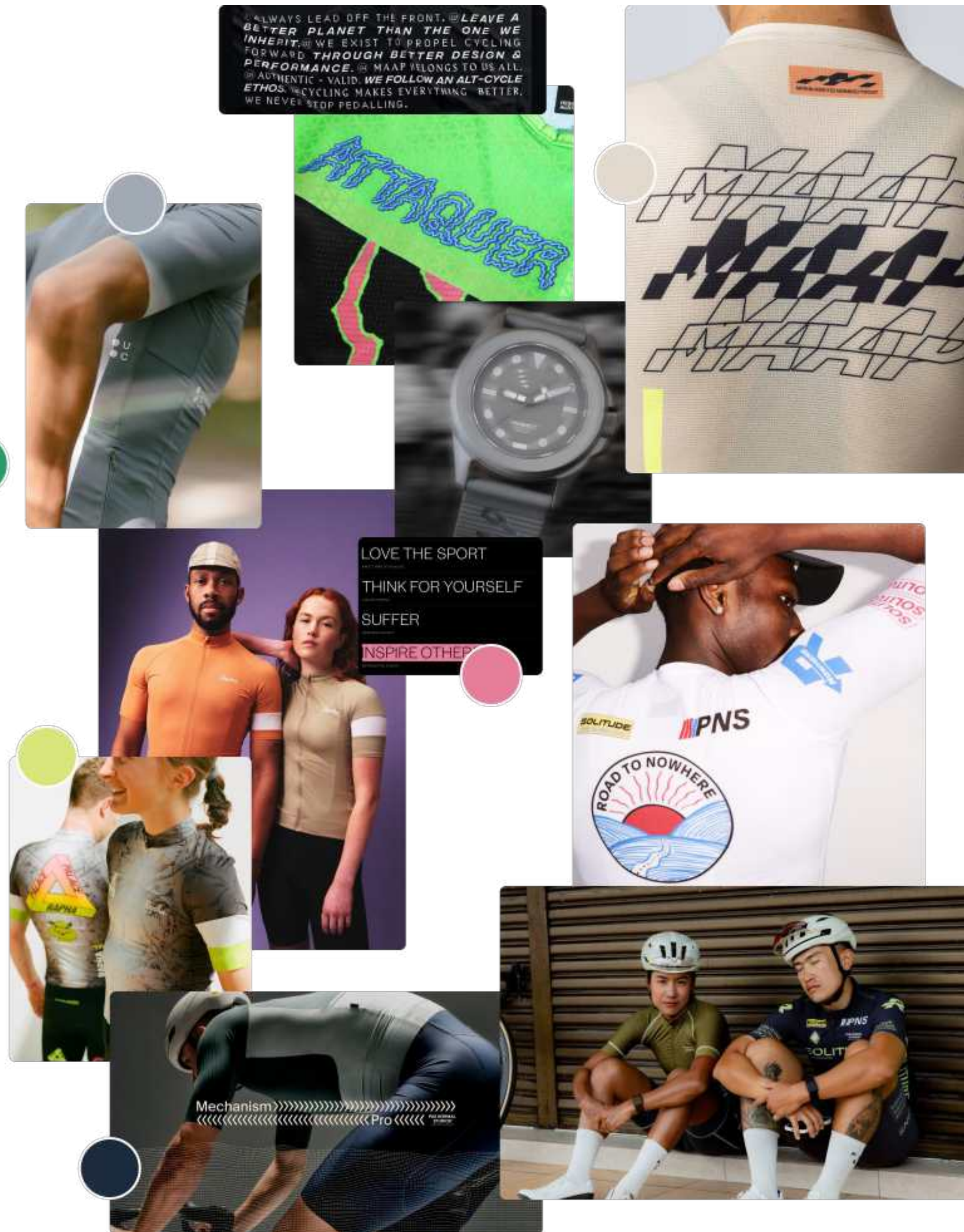


Easy Riders

Easy Riders prioritise simplicity, accessibility and comfort in their cycling endeavours. Their approach to the sport is down-to-earth and friendly, as they value ease and enjoyment above all else.



1— New School



Colours

These brands use a wide range of colours, with classics such as navy, grey, black and white, as well as earthy tones. They have more playful palettes that allow for 'statement pieces'.

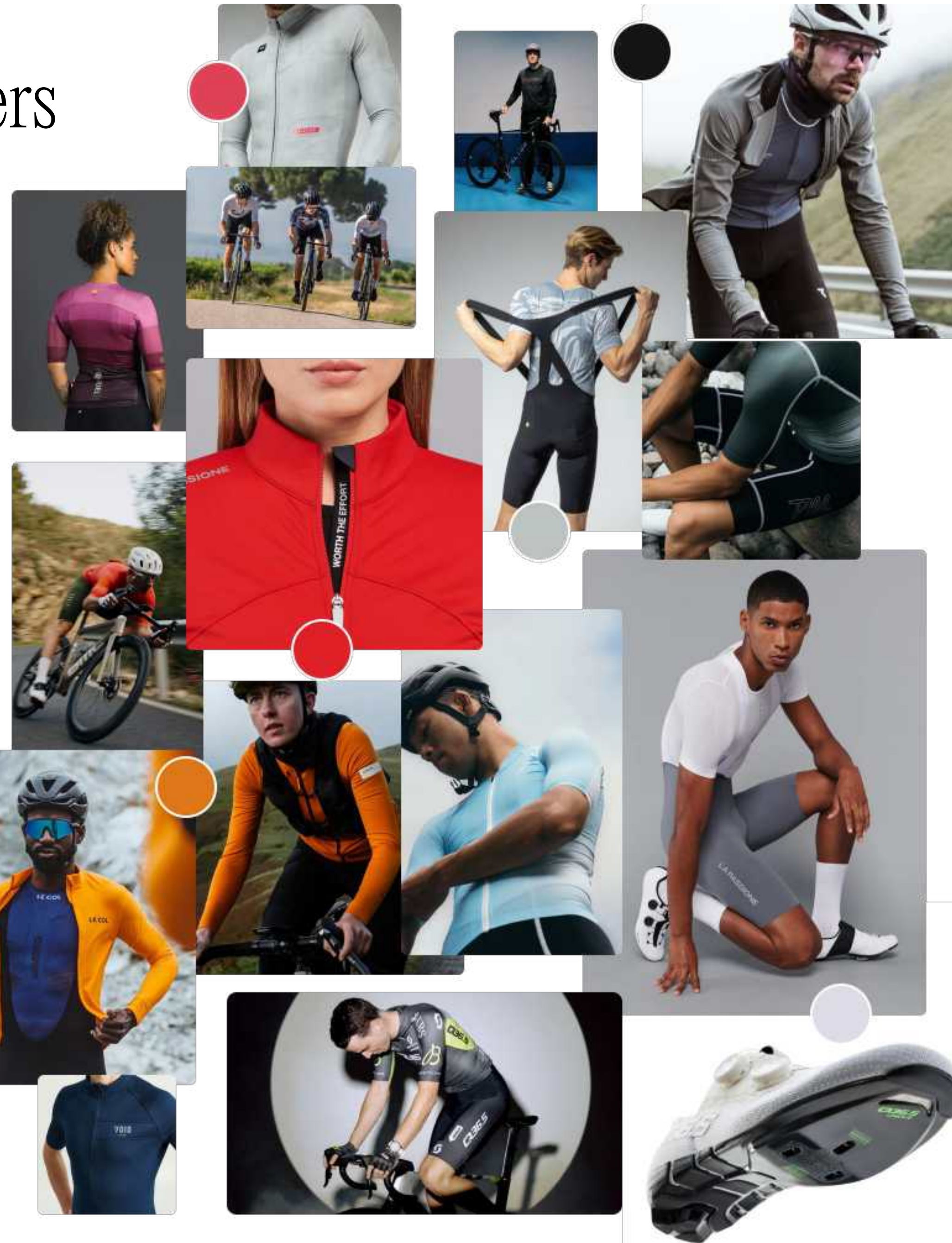
Photography

Emphasising the community aspect, the photography evokes emotion by capturing the different stages of the journey, from shared rides to moments of relaxation and fun. This narrative is further enhanced by performance-focused imagery, showing technical product details alongside stylish shorts to underline the appeal of the designs.

Product

Although each brand has its own distinctive identity, they share a common use of clean and geometric visual components that convey a sense of refinement and meticulousness to their products. Their logos often use stylised abstract shapes or letterforms, either to suggest dynamism and agility or to evoke the aesthetic of sponsored jerseys. These brands incorporate a wider range of graphic elements, patterns, gradients and even illustrations, making them more adaptable and desirable to a wider range of customers, while maintaining a premium quality and feel.

A woman is shown from the waist up, riding a road bike. She is wearing a white helmet, dark sunglasses, and a tan and black cycling jersey. Her hair is in a long braid. The background is a desert landscape with sand dunes under a blue sky. An inset image in the bottom right corner shows a close-up of a person's hands holding a yellow object.



This design palette features vibrant and bold colours, with cooler tones dominating, giving an aura of serenity and sobriety. The palette exudes a technical essence, evoking colours associated with technology and high-tech fields, accentuated by metallic and neon tones. With a focus on primary colours such as black, white, yellow, red and blue, there's little room for whimsy, resulting in a straightforward and functional aesthetic.

The photographic style captures intense cycling efforts, often portraying cyclists in action, conveying a sense of focus and determination rather than pure enjoyment. Each shot exudes an aura of achievement and performance. The meticulously edited images leave no room for mistakes or spontaneity, ensuring a polished and controlled look throughout. With high-definition clarity, the photographs show the products prominently, highlighting their details and texture.

Cycling brands that prioritise a performance-first approach manifest themselves visually through sleek, aerodynamic designs. Each product exudes a sense of speed and efficiency. With a minimalist aesthetic, these designs feature clean lines, colour blocks and interesting logo placement. Compared to the new schools, there is less use of prints and patterns. Instead, texture is achieved through materiality, such as mesh patterns, reflective materials, mottled fabrics or innovative construction techniques.

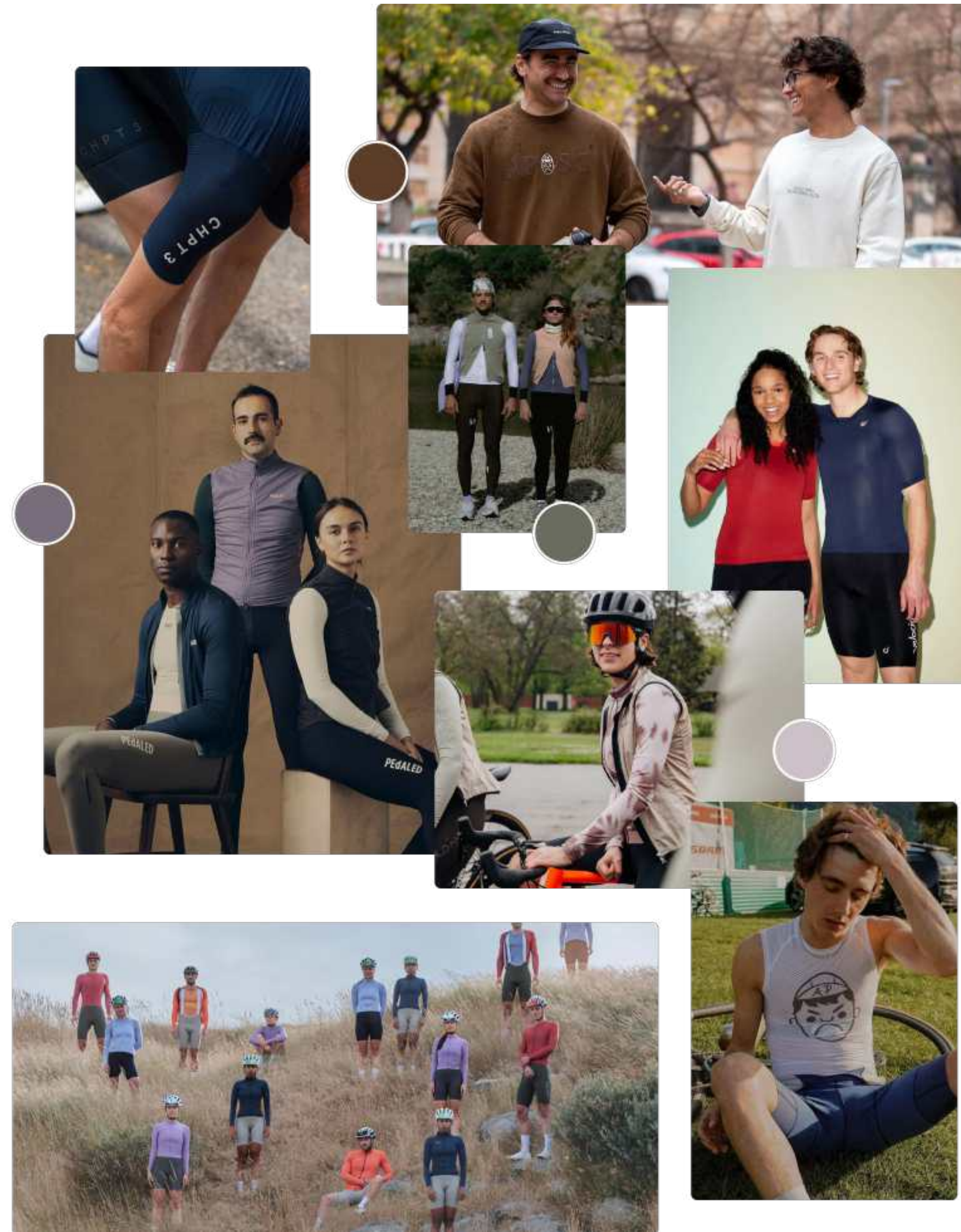
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Quirky cycling brands embrace vibrant and eclectic colour palettes, combining bold hues and playful patterns for a dynamic aesthetic. Their colours exude energy and personality, adding an exciting touch to every ride.

The photography style of the quirky cycling brands takes a fashion-forward approach, with models posing outdoors in urban or natural settings. Capturing a more spontaneous essence, these shots feel authentic and in-situ, evoking a sense of real moments rather than staged compositions. With minimal editing and a deliberate avoidance of studio aesthetics, the images have a raw and unfiltered feel, adding to their authenticity. In addition, these brands are championing inclusivity through their photography, showcasing a diverse range of body types and conveying a message of accessibility and inclusivity, ensuring their brand resonates with cyclists of all backgrounds and abilities.

Quirky cruisers redefine style with expressive patterns and playful graphics that create a distinct identity. Their designs are rich in print and illustrative elements, often playing with vintage motifs for a fresh take. With a not-so-serious vibe, these brands prioritise fun and comfort over a sense of performance.

4— Easy Riders



Colours

Easy Riders opt for earthy tones and soft hues in their color palettes, evoking a sense of warmth and comfort. With a focus on solid colors, their designs exude a timeless elegance that complements the natural surroundings of outdoor cycling. This subdued palette conveys a feel-good attitude, instilling a sense of calm and relaxation during rides, while also ensuring versatility and ease of coordination with other sport gear.

Photography

The photographic style of these brands tends to capture moments of camaraderie and enjoyment rather than emphasising performance. Often showing friends posing together or enjoying shared experiences, the images have a candid and authentic feel. Steering away of staged compositions, they embrace spontaneity, with many shots casual snapshots. Contrasting earthy and natural tones against urban backdrops adds depth and visual interest to the scenes. In addition, these brands experiment with photographic techniques, incorporating flash effects and deliberate motion blur to create dynamic and visually evocative images.

Product

The style of the products is simple and minimalist. They show their logo prominently and can have fun with the placement, like the letters on the Tan Line leggings. Instead of bold prints, they prefer subtle patterns and gradients. Their designs have a clean and cohesive look and don't feel over-engineered.

Stuff that we expect to see more of in the next years

Fashion collabs

No industry escapes to collabs these days. For cycling apparel brands, they serve as a mean to go beyond just equipment. For example, we've seen MAAP's partnership with Unimatic for a watch or Pas Normal Studios' collaboration with Salomon for shoes. But the most surprising one was probably Rapha x Palace, who created a limited edition switch-out kit for the riders of the pro tour. Skateboard and cycling brands together-who would have thought?

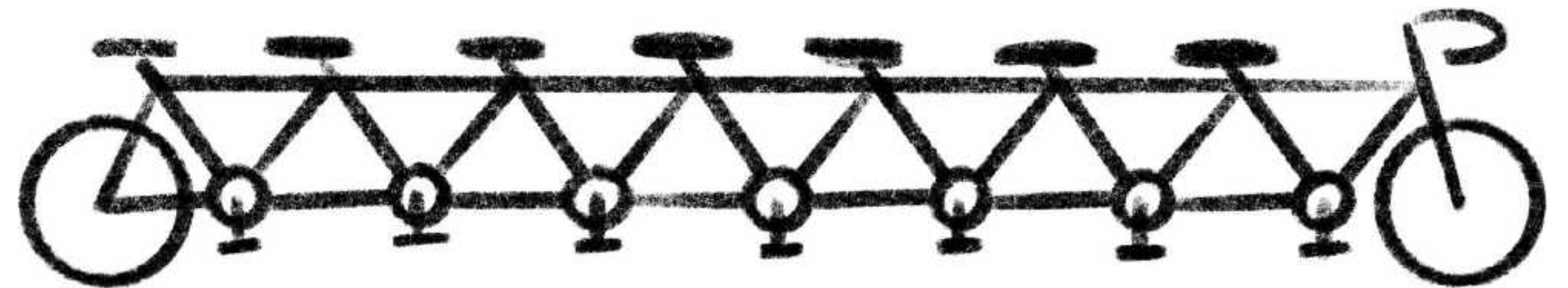
Off-bike collections

You can only sell a certain amount of bibs and jerseys, but you can always expand the product portfolio to more lifestyle clothing. Now even at a party, you can let people know that you are a cyclist. As seen with Isadore's Party T-shirt.

Next-gen brands getting into professional cycling

In the world of professional cycling, next-gen brands have established themselves:

- Rapha was the first to sponsor EF Pro Cycling Team.
- Recently, MAAP joined forces with Lifeplus-Wahoo to sponsor a women's professional cycling team recognised by the UCI.
- Pas Normal Studios continues its expansion into the global gravel scene with the launch of the PAS Racing Team, 18 international riders who will compete in gravel races around the world.



Feeling inspired?

Get in touch

We are thrilled to work with brands from small to large on branding, community building and digital products.

