ACTIVE WEAR:
FORECASTING FUTURE TRENDS IN FEMALE CONSUMER BEHAVIOUR

Stage 1: Literature Review
Global demand for female active wear is on the rise

The Australian Sporting Goods Association (ASGA) commissioned Victoria University’s Institute of Sport, Exercise and Active Living (ISEAL) to research female sporting and active lifestyle goods consumers, their key drivers and industry trends.

Stage One, the Literature Review*, analysed global research and industry reports to answer the following questions:

1. What are the emerging and predicted participation trends and influences for females in sport and physical activity?

2. What are the emerging and predicted (consumer and organisational) trends in the (female and household) active wear industry?

3. What is known about female influence on purchasing decisions?

The systematic review identified 459 research and industry publications. Only 41 publications examined the three questions and met the inclusion criteria.

For a copy of the full Literature Review and to access the next stages, subscribe to the research project at:

Emerging and predicted participation trends and influences for females

The needs of females in sport and physical activity have changed in the past decade.

Participation in non-organised physical activity is increasing, but decreasing in organised sport.

**MOST POPULAR SPORT AND PHYSICAL ACTIVITIES FOR WOMEN (OVER 15 YEARS)**

1. Walking for exercise
   - Number: 27,847,000
   - Participation rate: 30.4%
   - Proportion: 47.7%

2. Fitness/gym
   - Number: 17,457,000
   - Participation rate: 19.1%
   - Proportion: 29.9%

3. Swimming/diving
   - Number: 7,292,000
   - Participation rate: 8%
   - Proportion: 12.5%

4. Jogging/running
   - Number: 5,854,000
   - Participation rate: 6.4%
   - Proportion: 10%

5. Cycling/BMX
   - Number: 4,906,000
   - Participation rate: 5.4%
   - Proportion: 8.4%

**MOST POPULAR SPORT OR PHYSICAL ACTIVITY FOR GIRLS (5–14 YEARS)**

1. Swimming/diving
2. Netball
3. Gymnastics
4. Basketball
5. Outdoor soccer
6. Organised dance

Over the next 30 years Australians will favour exciting and adventurous free flow physical activity and lifestyle sports.
What influences females to participate in sport and physical activity vary according to their life stage

**GIRLS/YOUNG TEENS 5–14 YRS**
- Pre to primary to secondary school
- Fun, enjoyment
- Parental support (e.g., cost, transport)
- Friends who participate

**OLDER TEENS 15–18 YRS**
- Progression through secondary school
- Body image (e.g., shape, weight management)
- Fun

**WOMEN 19–64 YRS**
- School to university or work, moving out of the family home, beginning a live-in relationship, marriage, divorce
- Safe, accessible & comfortable facilities
- Culturally targeted information about activity
- Flexible activity schedule
- Fitness

**MOTHERS 18–40 YRS**
- Pregnancy, parenting young children
- Suitable and affordable childcare
- Group activities with their children and family

**OLDER WOMEN 65+**
- Health factors, disability
- Reduced cost of participation
- Health reasons
- Scheduled routine

**FEMALES ALL AGES**
- Role models
- Feeling confident
- Availability of facilities
- Social interaction
- Focus on reward, motivation and goals
- Welcoming and inclusive attire, approaches & environments
- The right to exercise
Emerging female consumer trends in active wear

HEALTHY GROWTH IN THE SECTOR

5% growth
Sales of women’s active wear apparel for 2013–2014

In 2013–2014 the US active wear accounted for 16% (US $33.7B) of the total apparel market and women’s active wear apparel grew 5% (US $7 B).

CONSUMER-LED INCORPORATION OF FASHION INTO THE MARKETING AND CONSUMPTION OF ACTIVE WEAR BRANDS

Kids active wear
Women play a big part in kid’s active wear consumption. US data shows that 80% of purchasers of kids’ active wear are women, mostly in the 25–44 age bracket. 2013 data also showed that girl’s active wear attracted more sales growth (8%) than boys (4%).

Changes to the active wear wardrobe
Reports from Canada and the US suggest the growth in active wear sales has, in part, been due to the consumer trend of bringing active wear into their casual daytime wardrobe. In Canada, women make 60% of active wear purchases with 1/3 being used for casualwear and only 1/5 being used for sport / exercise. Furthermore, about a quarter of Americans report dressing more casually than they used to, particularly American women.

50% growth
Sales of women’s active wear apparel for 2012–2014

In Australia active wear apparel sales grew (2012–2014) from approx. $60M to $90M and specifically women’s active wear apparel grew from approx. $20M to $30M.

Active wear is fast becoming part of streetwear and workwear, Americans listed multiple uses for their active wear:

- Running errands: 86%
- Sleeping: 61%
- Shopping: 59%
- Dining out: 20%
- Yoga pants as casual: 29%
Female influences on purchasing decisions

Women tend to consider more variables when choosing an active wear item as opposed to men. Gender, fashion consciousness and an active wear focus can impact the types and range of stores accessed by women.

### Decision Making Influences

- **Active wear product selection**
  - When compared to men, women are more likely influenced by:
    - Quality (not compromising on a product just being ‘good enough’)
    - Brand (price relates to quality, and prefer well-known brands)
    - Recreation (shopping is enjoyable and stimulating)
    - Confusion (overloaded by too much choice and information and feel unconfident to make choices)
  - • Impulse (unplanned shopping and spending possibly followed by regret) and equally likely to be influenced
  - • Price (price aware and looking for a good deal)
  - • Fashion (looking for new innovative brands and fashion)

- **Store selection**
  - Overall, women tend to use a bigger range of purchase locations (choices being, department stores, independent franchise stores, discount stores, mega shopping marts, fashion specialty malls, online shopping malls, and TV home shopping) as compared to men
  - • Shoppers with a higher fashion innovativeness (readiness to adopt new fashion trends) shop in a bigger range of location types

### Active wear consumer lifestyle profiles:

- **Fashion leaders**
  - Profile
    - Highly involved in being fashionable
    - Willing to spend time and effort being fashionable
    - Opinion leaders and enjoy shopping
    - They are not price sensitive
    - Less concerned with practical and utilitarian aspects of products
  - Demographics and purchase behaviour
    - More likely to be women
    - Prefer shopping online
    - Value quality, fashionable, coordination with other clothes, brand name and store image
    - Highest intention to re-purchase previously purchased brands

- **Sociable followers**
  - Profile
    - Highly value social activity
    - Only a small tendency towards fashion and prestigious brands
    - Somewhat price sensitive
    - Care about the opinion of others to their sportswear purchases to some degree
    - Not willing to put much effort into shopping around/researching purchases
    - Likely to be brand loyal
    - They care about quality and design but are not trend setters
  - Demographics and purchase behaviour
    - More likely to be women
    - Prefer discount stores
    - A more economic orientation and value sales promotion
Marketing to women

Active wear brands need to understand the lived context of the modern woman to properly market to her. It was reported that marketers often get it wrong when targeting female consumers. They need to move away from the old patronising gender stereotypes (covering everything in pink), and instead understand the realities of women’s lives. Social and emotional value should be considered with brand messages how their products will make them feel good, give them pleasure or provide social approval and improve how they are perceived.

Women are highly involved with many forms of technology and social media, and use it to research products, discuss and share information on products and make purchases. They now have major decision and purchase power in their families regarding all sorts of purchases, and many families rely partly or solely on a mother’s income. Women prefer a brand that offers good service and is sensitive to their needs, and this can lead to word-of-mouth recommendations and return business.

Generation influencing purchasing behaviour

As the physical activity needs and practices of females change across the life-span, so does their consumption of active wear and effectiveness of targeted marketing. The generation a female was born into affects her active wear purchasing behaviour.
Stage two

Over the past decade the needs of females have changed. The female participation trend towards unstructured physical activity and drive towards a healthy lifestyle has resulted in the growth of active wear sales. Market trends indicate this trend will continue over the next thirty years in Australia. Despite the change in needs, there is a gap in evidence-based publications identifying what influences female consumers to purchase active wear. To build a relationship, communicate and tailor marketing to the needs of female consumers is critical for the success of active wear brands. The results of the Second Stage of this project, involving focus groups with female active wear consumers, will provide data on what influences their purchases, including products and store, and their perceptions of what will influence females in future to purchase active wear.

Acknowledgements
Clare Hanlon, Ramon Spaaij, Hans Westerbeek, Grant O’Sullivan (ISEAL)

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