

Stage 1: Literature review



ACTIVE WEAR: FORECASTING FUTURE TRENDS IN FEMALE CONSUMER BEHAVIOUR

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Executive summary

BACKGROUND

Active Wear: Forecasting Future Trends in Female Consumer Behaviour, is a \$140,000 research project that will result in a comprehensive report about the trends in female active wear, consumer sentiment about the category and the future of the category in the Australian marketplace in the next five to 10 years. The report will provide valuable insights to brands, retailers and marketers of female active wear and for companies thinking of moving into that space. The Australian Sporting Goods Association (ASGA), as the premier thought leader in the sporting and active lifestyle goods sector, has identified women's active wear as a category that is both growing and not well understood by many in the sector. ASGA commissioned Victoria University to undertake this valuable research. This report is the first stage of the project – a Review of Literature. In total the project will consist of four stages and a final report.

A systematic literature review on female decision-making in regard to the consumption of active wear has been conducted. The review looks at research about women's participation in sport and physical activity and their consumption of active wear.

In regard to female participation in sport and physical activity:

1. What are the emerging and predicted participation trends for females in sport and physical activity?
2. At what age are girls influenced when deciding the type of sport or physical activity to get involved in?
3. What are the key influences for females to participate in sport and physical activity?

In regard to female consumers of active wear:

1. What is meant by the term active wear?
2. What are the emerging and predicted trends in the female active wear industry?
3. What are the wider societal trends that may determine the future direction of the industry?
4. At which age are girls influenced and starting to decide to purchase active wear?
5. What is known about female purchasing decisions and consumption of active wear?
6. What are the key influences on female consumers in regard to their purchasing decisions of active wear?

FINDINGS AND CONCLUSIONS

A comprehensive review of academic research and industry reports was conducted to identify the drivers and trends in female participation in sport and physical activity and their consumption of active wear. A summation of findings is presented:

Female participation in sport and physical activity

Evidence shows that over the past decade the needs of females in sport and physical activity have changed. Market trends continue to show that participation in non-organised physical activity is increasing and in organised sport is decreasing. This is particularly the case for females, regardless of age. The most popular types of sport or physical activity attractive to girls (5–14 years) are swimming/diving, netball, gymnastics, basketball, outdoor soccer and organised dance. The most popular type of sport or physical activity for women (15+ years) is walking for exercise, fitness/gym, swimming and running. Market trends indicate that over the next 30 years Australians will increasingly favour flexible, non-organised physical activity; pursue new adventure and lifestyle sports; and develop new tastes as the Australian population increases in cultural diversity.

The latter stages of primary school is when girls tend to drop out of sport and physical activity and by the time they enter secondary school (e.g., 12 years of age), they make decisions on what type of sport or activity they will participate in.

What influences females to participate in sport and physical activity vary according to their life stage. Five life stages have been identified in this report during which various influencing factors drive females to be active.

Females consumers of active wear

The last four decades have witnessed an increase in female participation in leisure sporting activities and fitness. As a result, market demand for female active wear has increased. However, the absence of literature on female consumers of active wear, particularly in Australia, clearly shows the gap of knowledge in this industry. Globally 459 refereed research publications or industry reports were identified and screened to address the research questions. From this total number, 41 met the study's selection criteria and were analysed for this review.

Conclusion and next stages

This report has identified what knowledge exists and what gaps are evident in understanding the drivers and industry trends that pertain to female consumers of active wear. Clearly there is an absence of knowledge regarding female consumers of active wear, particularly in Australia. What we do know is that a relationship exists between female participation in sport and physical activity and their purchasing decision-making in regard to active wear.

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. Despite the efforts of research to determine how brands could be better promoted in the active wear sector, particularly in Australia, it has failed to identify what encourages female consumers.

The anticipated life expectancy of women will continue to be higher than men. Market trends indicate that over the next 30 years Australians will increasingly favour flexible, non-organised physical activity; pursue new adventure and lifestyle sports; and develop new tastes as the Australian population increases in cultural diversity. This corresponds with the wider societal trends of consumer sensitivity to ethical, social and environmental consumption of active wear.

It is unknown at what age girls are first influenced and start purchasing active wear. What is known is that by the approximate age of 12, when girls transition from primary to secondary school, they make decisions on what type of sport or activity they want to participate in. Making such decisions reflect the type of active wear they would require in order to participate in a selected sport or activity. Parental influence of, in particular, the mother is still significant at this age. Data shows that 80% of purchases of children's active wear are women and girl's active wear attracts more sales than boys.

The key influences for females to participate in sport and physical activity depend on their life stage. This is similar to the influences on females when purchasing active wear, and research shows that lifestyle profiles of different groups need to be considered for cross-global marketing/brand positioning.

Another trend in the active wear industry is the consumer led incorporation of fashion into the marketing and consumption of active wear brands. This needs to be seen in light of the use of active wear as casual daywear, work-wear, sleepwear and evening wear.


Recommendations have been made to build a relationship with female consumers in order to effectively market to them. This is made difficult if active wear brands do not understand the needs of females, the key influences on what encourages females to purchase active wear, or failing to recognise some of the emerging or predicted trends that were described in this report. Key themes have evolved from this literature review specific to females that need to be explored to gain an insight into what drives female consumers to purchase active wear. These themes will be investigated in the next stage of the research project. The themes will structure and design focus group discussions, to further zoom in on the needs and wants of females in regard to active wear.

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