

Stage 2: Focus groups



ACTIVE WEAR: FORECASTING FUTURE TRENDS IN FEMALE CONSUMER BEHAVIOUR

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Executive summary

The Australian Sporting Goods Association (ASGA) commissioned Victoria University to undertake *Active Wear: Forecasting future trends in female consumer behaviour*, a major research project that will provide valuable insights to brands, retailers and marketers of female active wear.

The project has been divided into four parts, with Stage One, the literature review, completed in 2015. This report provides detail on Stage 2, the focus groups of female consumers of active wear. Stage Three – the Delphi study of active wear brand and retail experts and Stage Four, the quantitative survey, will be completed later in 2016.

The research project will:

- Identify what drives female consumers in their purchasing decisions with regard to active wear and what is the place of sport versus fashion related decision-making.
- Understand their hierarchy of priorities in purchasing active wear.
- Determine if there is a relationship between female purchasing decision-making in regard to active wear and their participation (or lack of it) in sport and active recreation.
- Identify the consumer and organisational trends in the female active wear industry. Identify what will be the major changes that are likely to happen in the industry in the next 5–10 years.

This Executive Summary provides an overview of the findings from focus groups conducted in late 2015. A total of 72 active women, aged between 16 and 35, provided their insights at eight locations across NSW and Victoria.

The key findings from Stage Two are:

1. 'Self-care' – a holistic approach to looking after your health and appearance – is the primary motivator and influence of purchasing active wear for women. Purchasing active wear facilitates and enables females to feel they are looking after themselves.
2. Females target brands they trust and believe sport brands have legitimate, 'tried and tested' products.
3. Seven key principles influence a woman's purchasing decision of active wear:
 - a. Rationale for being active
 - b. Coverage and flattering their body
 - c. Societal influences
 - d. Communications and marketing
 - e. Brand relationship

- f. Product characteristics
- g. Retail experience.

Within these principles are different drivers that influence females in their decision to purchase active wear.

4. There is a clear distinction between function and style. Women will pay more for functional active wear if there is demonstrable value-for-money (e.g. quality, durability). They will pay less for style-based active wear (e.g. tops and shorts) that are assumed to have basic functionality. Style apparel is often purchased to express the identity of the individual.
5. Performance aspects of active wear play a key message in communications. Females want to be educated on what an active wear product does to assist them to feel good during physical activity.
6. Females believe active wear facilitates physical activity and good health. Brands and retailers should develop holistic marketing approaches for each consumer segment that links active wear to relevant opportunities to improve health and well-being.
7. Women want to see their own shape in active wear products; preferred models were fit, showed sweat, exercised outdoors, and contained minimal make-up. Product sizes and models represented the average size of Australian females (size 16).
8. A common purchase process involves females interacting between online (research product) and in-store (try product on). There is a need to improve the synergies between the two environments to produce a single seamless and integrated retail experience that will benefit the sport brands/store.
9. Instagram is the primary media source used by women. Popular accounts included notable sports women who used Instagram and informally took photos of themselves wearing the product. Legitimacy was still maintained when these women had their accounts linked to online retail outlets.
10. It must be noted that one size does not fit all. Females are individuals and have different beliefs and behaviours depend on their life status, physical activity and segmented purchase triggers.

The following report of the Stage Two focus groups provides valuable qualitative research that will allow brands, marketers and retailers to understand, in-depth, the purchase decision-making habits of female consumers of active wear.