

Stage 4: National survey



ACTIVE WEAR: FORECASTING FUTURE TRENDS IN FEMALE CONSUMER BEHAVIOUR

Contents

Executive summary	4
Introduction.....	6
Scope & data collection	7
How physically active were these females?	8
What influences the consumption of active wear?	9
How does age affect the motivations of consumers to purchase active wear?	11
Online vs in-store retail consumption.....	12
More findings.....	13
Three factors drove purchase decisions: product attributes, appearance and communications	12
Australian active wear consumer segments	17
Instant Gratifier	18
Healthy Maintainer	22
Healthy Stylist	26
Self Driven	30
Sports Passionate.....	34
Socially Driven	38
Inactive.....	42
Cross-segment and key relationships.....	46
Conclusion.....	51

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: Stage One, the literature review, completed in 2015; Stage Two the focus groups of female consumers of active wear, was completed in 2016; Stage Three, the Delphi study of active wear brand and retail experts completed in 2017; and this report provides findings for Stage Four, the national survey that was conducted in collaboration with 10 THOUSAND FEET.

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 female consumers 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 five years.

The purpose of Stage Four is to quantify the factors that drive female purchasing decisions that pertain to active wear, the language that attracts and sustains them in purchasing active wear, and the relationship between purchasing decisions and sport and active recreation participation.

The following report of the Stage Four National Survey provides valuable quantitative research that will allow brands, marketers and retailers to understand, in-depth, the purchase decision-making habits of female consumers of active wear.

The study surveyed 1025 female active wear consumers. The sample comprised representatives of the Australian population ranging from 16+ years of age, who had purchased active wear in the last two years

Key findings include:

1. Active wear consumer segments

The analysis of the survey identified seven segments of female active wear consumers:

- Instant Gratifier
- Sports Passionate
- Healthy Maintainer
- Socially Driven
- Self Driven
- Inactive
- Healthy Stylist

2. Active wear attitudes

Females wanted to purchase active wear from brands that focused on function and performance (40 per cent), flattered their body shape (28 per cent) and communicated a healthy lifestyle approach (17 per cent).

3. Attitude towards exercise/sport

Whilst some segments of the population who purchase active wear love sport and exercise (21 per cent) they are the minority. Most female active wear consumers view exercise as an important part of their routine (46 per cent) or as a means to an end (29 per cent).

4. Frequency of wearing

Active wear was worn for the purpose of exercise (74 per cent) and playing sport (55 per cent). Secondary areas of usage were for home wear (20 per cent) and running errands (13 per cent).

5. Frequency of purchasing

Female consumers purchase active wear on average 3.4 times per year, with metropolitan consumers purchasing active wear (3.6), slightly more frequently than regional consumers (3.1). Younger consumers (16–34 years old) purchase active wear one more time per year on average than older consumers (4.1 vs 3.0 times per year), with 25–29 years purchasing most frequently of all demographics (5.1 times per year).

6. Sizes

Approximately 70 per cent of consumers were between sizes 10 and 16 in both pants and tops, with around 17 per cent sizes eight or below and 13 per cent sized 18 or above.

7. Online/in-store purchasing

Only 5 per cent of consumers purchase active wear solely online, compared to 65 per cent who purchase only in-store. The remaining 30 per cent purchase via a combination of in-store and online.