



VICTORIA UNIVERSITY
MELBOURNE AUSTRALIA

Women's activewear trends and drivers: a systematic review

This is the Accepted version of the following publication

O'Sullivan, Grant, Hanlon, Clare, Spaaij, Ramon and Westerbeek, Hans
(2017) Women's activewear trends and drivers: a systematic review. *Journal of Fashion Marketing and Management: An International Journal*, 21 (1). ISSN 1361-2026

The publisher's official version can be found at
<http://www.emeraldinsight.com/doi/full/10.1108/JFMM-07-2015-0059>
Note that access to this version may require subscription.

Downloaded from VU Research Repository <https://vuir.vu.edu.au/33183/>

Women's activewear trends and drivers: A systematic review

Grant A O'Sullivan, Clare Hanlon, Ramon Spaaij, and Hans Westerbeek

Institute of Sport, Exercise and Active Living, College of Sport and Exercise Science,
Victoria University, Footscray Park Campus, PO Box 14428 Melbourne VIC 8001,
AUSTRALIA

Acknowledgement: This project was funded by the Australian Sporting Goods Association (ASGA), an association that is committed to being a leading advocate in the industry on female active wear. The role of ASGA during the project was to establish a sub-committee with the researchers of this project to identify the research questions, discuss the findings and activate a number of the recommendations.

Women's activewear trends and drivers: A systematic review

Abstract

Purpose

The activewear industry would benefit from an evidence-based understanding of how activewear is incorporated into women's lives and their changing participation in physical activity. Activewear brands may be missing the trend of women moving from organised sport to non-organised and individualized sport and recreation. This systematic literature review explored the degree to which academic and industry research understood patterns and influences on female's activewear consumption and identified what significant gaps are evident in understanding the drivers and industry trends that pertain to female consumers of activewear.

Methodology

The review sought academic and industry research papers. Articles were selected if they included female participants; and/or addressed consumer related information; and focussed on active wear. Article findings were thematically analysed.

Findings

Most literature exploring activewear consumption fails to take gender into consideration or explore unique female consumer profiles. Females are bringing activewear into other parts of their wardrobe and are placing more value on fashion, even for sports attire. Research identified the need for activewear brands to consider lifestyle, emotional and personality elements of consumer behaviour. However a specific focus on women's branding was absent. Women's age and generation influenced their activewear consumption. Although some industry reports discussed the shift in use of activewear, no studies explored the impact of the critical shift in women's physical activity patterns on the activewear industry.

Originality

Women's activewear trends and drivers: A systematic review

This review identifies the gap in knowledge regarding women's activewear consumption patterns and needs, and the importance of reflecting the changes in female physical activity participation. It also links marketing and design of women's activewear to the needs of female consumers based on their actual patterns and trends in physical activity. The findings are relevant to activewear researchers, brands, marketers and producers.

Keywords: Activewear, Women, Consumers, Physical Activity, Trends

Article Classification: Literature Review

Women's activewear trends and drivers: A systematic review

Introduction

Women are a significant and partially untapped segment in the sport and activewear marketplace. Quester et al. (2014) assert how important it is for marketers to identify the motives that influence the behaviour of their target market. In the case of women's activewear, these motives are evolving. If marketers of activewear assume that women identify with the 'traditional' idea of the female athlete, they may be missing out on the majority of women who do not connect with this identity (Glass, 2014). A prudent activewear marketer would seek to understand the trends and future projections of how women are physically active, and how their apparel might better meet their needs.

Female Physical Activity Patterns and Trends

Women's activewear producers do themselves a disservice if the purpose of their apparel design and marketing does not match the actual patterns of women's physical activity. Data on the types of sport females participate in show a shift from organised sport to non-organised sport and other types of unstructured physical activity. This shift has been noted in both the UK (Opinion Leader, 2011) and Australia where females are more likely to choose non-organised sport over organised sport (Australian Bureau of Statistics, 2012b, Eime et al., 2013). This review will use the Australian context to present a comprehensive picture of female physical activity trends and forecasts, and to consider how these can inform the design, marketing and branding of activewear to women. The Australian context was selected because Australia is a market trend leader in the Asia-Pacific region, it has a global reputation as a sporting nation (Australian Sport Commission, 2015), and there has been increased funding to encourage more females to participate in sport (Australian Government,

Women's activewear trends and drivers: A systematic review

2012). Further, this review is part of a larger study that seeks to better understand the Australian women's activewear market.

In 2011-2012 the number of females participating in non-organised physical activity was 4.7 million (or 51%), almost double the participation rate for organised activity (2.4 million or 27%) (Australian Bureau of Statistics, 2012a). The top five non-organised activities for females over 15 years were walking for exercise (30.4%), followed by fitness/gym (19.1%), swimming (8%), and running (6.4%) (Australian Bureau of Statistics, 2012a). Among organised sport, the most popular choices were swimming and diving (19%) followed by netball (16%). Another study showed an increase of roughly 50% in Australian women's non-organised participation in jogging, bike riding and yoga over the 2010-14 period (Roy Morgan Research, 2014). Other data reveals that girls aged 4-15 report higher participation in bike riding or rollerblading/skateboarding/riding a scooter than for any single organised sport (Ministerial Advisory Committee on Women and Girls in Sport and Recreation, 2013). Collectively, this data all points to a female migration from organised sport to non-organised sport and other fitness activities.

This trend is reflective of broader shifts in sport participation in Australia. Over the next 30 years it is predicted that Australians will increasingly favour flexible, non-organised physical activity and pursue new lifestyle and adventure sports (Hajkowitz et al., 2013). Further social and demographic changes that are likely to shape women's physical activity participation include the increase in health and fitness motivated individualised sport activities (Hajkowitz et al., 2013), as well as Australia's aging population, where women will continue to live longer than men and where '65 years and over' will be the fastest growing age group (Australian Bureau of Statistics, 2013).

Australian sport policy is informed by these broad demographic and participation trends, indicative of which is its focus on the migration of people from one type of physical

Women's activewear trends and drivers: A systematic review

activity to another and also on an aging population that seeks to remain active. At the same time, it focusses policy attention on the other end of the age spectrum by seeking to address the alarming drop out of youth in sport (Australian Sports Commission, 2015). Data shows that girls often drop out of sport/physical activity by the time they enter secondary school (e.g., 12 years of age), an age when they also make important decisions on what type of sport or activity they will participate in (Institute of Youth Sport, 2011). This is supported by research showing that by primary school years 6 and 7, girls are increasingly participating in organised team sport and activities, but this drops off and is replaced by more non-organised, non-competitive sport and physical activities (walk, run dance, gym) by high school year 11 (Eime et al., 2013).

The life stage of women can influence their participation in sport and physical activity. In the preschool to early high school years, girls' participation is influenced by fun and enjoyment (Craike et al., 2009), parental support (e.g. cost, transport) (Hanlon et al., 2010), and friends who participate (Theriault et al., 2010). In later high school years girls are more influenced by body image (Sebire et al., 2014, Wilson and Dollman, 2009), and fun (Hanlon et al., 2010, Confederation of Australian Sport, 2013). For mothers, sport and physical activity participation can be influenced by suitable and affordable childcare (O'Flynn and Lee, 2010, Yungblut et al., 2012), and the capacity for group activities with their children/family (Hanlon et al., 2010, Jones et al., 2013). In pre-retirement adulthood women's participation is influenced by safe, accessible and comfortable facilities (Craike et al., 2009), culturally targeted activity information (Caperchoine et al., 2009), a flexible activity schedule (Payne et al., 2003), and fitness (Halyk et al., 2010). Women of retirement age are influenced by reduced cost of participation (Sebire et al., 2014), health reasons (Leone and Ward, 2013), and having a scheduled routine (Cortis et al., 2007). Finally, factors that can influence female sport and physical activity participation generally include having role models (Sawrikar and

Women's activewear trends and drivers: A systematic review

Muir, 2010), feeling confident (Cortis et al., 2007, Theriault et al., 2010), availability of facilities (Australian Government, 2012), social interaction (Hanlon et al., 2010), focus on reward/motivation/goals (Pal et al., 2009), welcoming and inclusive attire/approaches/environments (O'Driscoll et al., 2014), and the right to exercise (Confederation of Australian Sport, 2013).

This literature review aims to explore the degree to which trends and patterns in female participation of sport and physical activity and related lifestyle factors are taken into consideration when brands design and market activewear to women. It will also investigate the patterns of and influences on female activewear consumer behaviour. This will assist activewear producers to better customise their marketing and brand positioning to consider the unique lifestyle and physical activity needs of their female consumers.

Methods

Activewear has been defined quite narrowly as clothing designed for being active in sport or exercise, and more broadly as clothing designed to transition from leisure to casual daytime wear or evening wear. In the current literature search, a broad definition of activewear was utilised in regard to the search terms. However, some link to being active in the design purpose of the garments, such as sport, exercise, or being outdoors was important. This helped differentiate the term 'sportswear', which in Asia and Europe refers to apparel for the purpose of being active, from the US where it is a fashion term that defines casual day wear.

Data Sources and Searches

A systematic literature review methodology was selected. The value of a systematic process is that it collates the available empirical evidence that meets pre-determined eligibility criteria to help address particular research questions; this minimises bias and strengthens the

Women's activewear trends and drivers: A systematic review

reliability of the findings (Higgins and Green, 2011). An initial search of research literature was conducted in March and April 2015. English language articles published between 2005 and 2015 were selected from the following sources: the EBSCO collection of databases, Web of Science and Scopus. The EBSCO data base search looked for search terms in the titles and abstracts of papers, sought only for certain article types (academic journals, trade publications, reviews, journals, overviews, reports, books, and dissertations) and excluded databases that were not relevant. The following Boolean phrase of search terms was used: (Activewear OR "active wear" OR sportswear OR "sports wear" OR leisurewear OR "leisure wear" OR "lifestyle wear" OR "lifestyle fashion" OR "active apparel" OR "sports apparel" OR "leisure apparel" OR "lifestyle apparel" OR "fitness wear" OR "fitness apparel" or "Athletic Leisure") AND (trend* OR forecast* OR female* OR women* OR girl* OR future* OR influence* OR consumer*). The asterisk represents searching for every extension of a word (e.g. trends, trended, trending). Grey literature in the form of apparel industry reports was also sought and consulted. Industry reports were identified through the databases IBIS World, MarketLine, and Google. They needed to address either activewear or sportswear and be published in the period 2005-2015.

Study Inclusion Criteria

Articles were included if they contained female consumers/participants; and/or addressed trends, influences, future forecasts or consumer related information; and focussed on sport, leisure, lifestyle or active wear. Articles were excluded that focussed only on men, technical aspects of fabric design or garment construction, or did not contain a strong connection to consumer behaviour. Articles were also excluded if a full-text version could not be sourced. The resultant sample ranged from scientific research utilising sophisticated methods such as structural equation modelling and factor analysis, through to industry reports on sales data

Women's activewear trends and drivers: A systematic review

and consumer trends using descriptive statistics. Figure 1 shows that 41 articles were included in the review.

[INSERT FIGURE 1 HERE]

Results and Discussion: What do we know about the influences on women's activewear consumption?

The review identified six key themes in the literature: (1) activewear sales growth; (2) impact on branding; (3) activewear as fashion; (4) consumer decision making; (5) generation and age; and (6) marketing to women. The findings generally highlight the lack of focus specifically on women in this area of research.

Activewear Sales Growth

Several industry reports indicated a growth in activewear sales in recent years, suggesting it is a segment of the apparel market that merits attention. In the US, in 2013-2014 activewear accounted for one sixth of the overall apparel market, yet contributed significantly to the three-year sales growth of apparel (5% growth without activewear, 9% growth with activewear) (NPD Group, 2014). The activewear growth has been influenced by a shift from activewear being worn for athletic, sport and exercise reason to it being worn for casual/everyday use and school use (NPD Group, 2014). This finding is supported by other reports from Canada (NPD Group, 2013b) and the US (Rugolo, 2013). In Canada, women make 60% of activewear purchases with a third being used for casual wear and only a fifth being used for sport or exercise. In the US, a quarter of Americans, and particularly women,

Women's activewear trends and drivers: A systematic review

dress more casually than they used to. Activewear is also increasingly becoming part of streetwear and work/office wear (Cohen, 2014). Prudent brands should seek to design and market to this shift in activewear purpose.

US data suggests that the product groups most responsible for activewear growth in 2013-2014 were women's apparel (8% growth) and children's athletic footwear (9% growth) (NPD Group, 2015). Women's spending also contributed to activewear sales growth in the 2012-2013 year, up 5% on the previous year on August year-to-date figures (NPD Group, 2013a). The literature also indicates that women account for 80% of children's activewear purchases, and that girls activewear (up 8%) grew more than boys (up 4%) in 2013 (NPD Group, 2013c). Thus, it can be seen that in the US, women are a key demographic in the increased popularity in activewear.

International research provides further evidence of this trend. Korean research has used fashion market forecasting which considers consumer expenditure on fashion items in each of the four retail seasons to forecast the future growth of the Korean fashion industry (Yusoon et al., 2011). They found that sportswear, along with other markets, except women's formal wear, would experience future growth in demand. This suggests that the activewear sales growth trend seen in recent years may continue into the foreseeable future. In Australia, an ongoing survey of sales data from selected large activewear brands, occurring through wholesale and non-traditional retail avenues, is suggestive of growth in the broader activewear industry (10 Thousand Feet, 2015). Their data from the 2012-2014 period saw a gradual increase in their activewear sales of almost 50% (from around \$60M in mid-2012 to about \$90M at the end of 2014). This growth is reflected in women's sports apparel (from around \$20M mid-2012 to about \$30M mid-2014) (10 Thousand Feet, 2015). During this period, men accounted for the lion's share of activewear sales for these brands via these sales avenues, with women accounting for only 3.2% of licenced brand activewear, 13.6% of sport

Women's activewear trends and drivers: A systematic review

accessories, 38.2% of non-licensed brand activewear and 33.7% of lifestyle fashion activewear purchases. Interestingly, womenswear accounts for more sales in non-licensed brand items than lifestyle fashion items. This account could represent a missed opportunity for the Australian activewear market. This is with respect to following sections of this review that discuss the importance of both lifestyle factors and fashion in women's activewear consumption, suggesting that if branded and marketed properly, women could comprise a larger segment of the lifestyle fashion market.

Considering the significant role women play in activewear sales, a targeted investigation of the unique activewear consumption practices and influences of women is warranted. However, this should also investigate the connection between the evolution of the use of activewear and the shift in women's physical activity patterns. If women's activewear producers continue to focus on sport usage in their design and marketing, they may miss both the trend of wearing activewear in other non-sport contexts and the shift in female physical activity participation away from organised sport and into non-organised sport and fitness activities (e.g. Australian Bureau of Statistics, 2012a, Australian Bureau of Statistics, 2012b, Eime et al., 2013, Opinion Leader, 2011).

Impact on Branding

The literature on activewear branding shows that marketing must consider broader consumer needs and lifestyle factors. However, few studies specifically looked at females or conducted a gender comparison.

Evidence suggests that activewear brand loyalty (return business) for males and females is most affected by perceived product quality (size, fit, material, colour, function etc.) followed by style (how fashionable), and brand name (how famous the brand is) (Yee and Sidek, 2009). Thus, garment function is important, but fashion and brand name are also

Women's activewear trends and drivers: A systematic review

influences on activewear brand loyalty. Activewear brand personality (the type of human personality traits the brand attracts) is another element that contributes to brand loyalty (Suddin et al., 2014). Male and female consumers who have high involvement with activewear (i.e., have more interest in these products and spend more time researching and shopping for them) will exhibit increased loyalty to a brand personality that matches their own self-image. Brand personalities can also be identified that increase loyalty in low involvement consumers. Thus, understanding how high and low involved consumers perceive the personality of a brand can inform marketing attempts to aid loyalty. No study looked at the specific brand loyalty influences of women.

Brand loyalty and brand personality are major contributors to overall activewear brand equity (and to a lesser degree perceived quality, perceived price, and brand awareness) (Tong and Hawley, 2009, Ko and Zhang, 2009, Ko et al., 2009) which can positively influence purchase intentions. Although this relationship can vary across different countries and market segments, consumer lifestyle-based profiles exist across countries that can also impact on the relationship between activewear brand equity and purchase intent. For example, one study into cross-national activewear consumer profiles revealed that a connection to fashion has become a trait that highly influences some activewear consumers, particularly women (Ko et al., 2012). The identified activewear consumer profiles transcend country-specific characteristics. This reinforces the idea that activewear marketers should consider consumer lifestyle profiles when seeking to develop a global marketing strategy.

Another evidence-based strategy for brand marketing across international market segments is the use of emotion-based marketing - aligning the emotions projected by a brand with the emotional needs of the market (Rynarzewska and McClung, 2012). Activewear brands can benefit from emotionally targeting both competitive and non-competitive sport participants in their marketing. However caution has been expressed not to perpetuate

Women's activewear trends and drivers: A systematic review

stereotypes by assuming that women equals non-competitive, and men equals competitive. Effective emotion-based marketing can influence brand attitudes and purchase intention. For example, non-competitive sports participants find that participation and enjoyment based advertisements are closer to their own experience and therefore connect to them more (Rynarzewska and McClung, 2012). Once again, a male dominated sample means the effectiveness of emotion based marketing of activewear to women requires further attention.

To date, little is known about the role of gender in determining activewear cross-national consumer lifestyle profiles and emotion and brand personality based marketing factors. An important trend to consider here is the increasing popularity among women of physical activity focussed on health, fitness, participation and enjoyment rather than competition and performance. Marketers should look to the data emphasising the increasing popularity of informal sport amongst women (Opinion Leader, 2011), the emerging popularity of fitness/gym and walking for girls (Australian Bureau of Statistics, 2012a), and the marked increase in women's participation in non-organised sports such as jogging, bike riding and yoga (Roy Morgan Research, 2014).

Activewear as Fashion

There is a fading line between sport and casual daywear and there are a large number of luxury high-end brands developing active sportswear using novel design orientations for performance clothing. As a result these sport-inspired garments are part of everyday wear especially among the younger generation who tend to define what consumers will be wearing in the future (Bramel, 2005). The interaction and blurred boundaries of sport and fashion impact on both sport and fashion wear markets. Companies that sell after-sport garments to their core clientele can seek to attract a broader customer base who desire a sporty image but who do not necessarily engage in sport-based activities (Bramel, 2005). An equal measure of

Women's activewear trends and drivers: A systematic review

style and performance has now been developed for activewear as female trends indicate the demand for multiple uses of garments (Bramel, 2005).

The incorporation of fashion into activewear is certainly not without precedence. Activewear has the purpose of aiding performance and absorbing sweat, yet it is also a tool to express oneself which is a function of fashion (Asian Textile Journal, 2005). While fabric technology is the main feature of garments, fashion adds value and helps activewear gain mass appeal (Asian Textile Journal, 2005). This last point was embraced by golf wear label Lija (Ross, 2005). Started by a female golfer, Lija sought to fill a gap in the conservative golf wear market by being inspired by catwalk trends and focusing on femininity. This strategy payed off as this label moved beyond the golf course and became a successful brand. In this context, it should be noted that the role of femininity in women's sport based apparel has a complex history. For example, the running skirt emerged as a response to the notion that women do not need to dress like men to participate in the masculinised world of sport (Williams, 2011). The feminisation of women's attire in sport was initially seen as trivialising women's participation and almost apologising for being part of historically masculine sporting world. However, contemporary feminism now rejects this view and thus athletic women increasingly desire to look feminine and fashionable while still taking their sport seriously. (Williams, 2011)

The literature emphasises the role of fashion in activewear design, production and branding. The main message to consider is that for those women engaged in competitive sport fashion is still valued, and for the increasing number of women involved in non-organised sport and physical activity, activewear producers need to meet both their recreation and fashion needs.

Consumer Decision Making

Women's activewear trends and drivers: A systematic review

A number of articles investigated the variables that influenced activewear purchase decision making, from product selection to store selection. Table 1 summarises the findings. Results included that women tend to consider more variables when purchasing activewear, and that gender, fashion consciousness and an activewear focus can impact the range and types of stores accessed. Evidence confirms that multiple influences are at play when people make decisions about activewear purchases. Prudent activewear marketers will find multiple angles to improve consumer engagement. However, in regard to store selection, it is worth noting that during an economic down turn consumers are less likely to purchase from apparel and leisure stores unless apparel or leisure is important to them (Pentecost and Andrews, 2013).

[INSERT TABLE 1 HERE]

Women consider a range of variables when selecting activewear stores, they are more influenced by activewear fashion, and they are more likely to purchase activewear if they participate in physical activity. This suggests that to break through the clutter of shopping information, a brand or retailer would be advised to combine an appeal to fashion with meeting the real physical activity needs of women. This reinforces a major finding from this literature review: it is crucial for the activewear market to meet the current and future physical activity needs of female consumers in order to remain relevant. In other words, observe the shift from organised sport to non-competitive and non-organised physical activity, and meet those needs in apparel design and incorporate fashion.

Generation and Age

A woman's age or the generation she was born into can influence her activewear consumer behaviour. When comparing women from the gen Y and baby boomer generations regarding

Women's activewear trends and drivers: A systematic review

activewear (compression garments) consumption, researchers found several generational differences (Rahulan et al., 2015). Table 2 summarises key findings from this research.

[INSERT TABLE 2 HERE]

Another study focussed specifically on female activewear consumers from the baby boomer generation (Wray and Hodges, 2008). It found that many women from this generation associate more with an activewear advertising model that best represents their cognitive age (being younger in how they looked, felt, the activities they did and their interests) as opposed to their actual age. However, this did not necessarily translate into purchase intent as many factors including seeing, feeling and trying on an item contributed to purchasing behaviour. This suggests that marketers need to consider diverse strategies when targeting women of varying generations.

Young consumers are a key apparel market segment and research has emphasised the importance of attracting young people to an activewear brand (Frank, 2014). This research asserts that clothing is an important part of self-expression and identity for young people. With activewear being the most branded segment of the apparel market, young people present an opportunity for strong activewear growth. This is particularly evident when considering the trend among young people toward a more active life that has both physical and social value. The social element in particular has impacted upon the fashion-oriented nature of activewear. Companies that can tap into the youth market tend to have greater longevity by creating an earlier consumer relationship (Frank, 2014). It is also worth noting that youth tend to prefer global over local brands as they convey more social prestige, thus prompting companies to pursue more global marketing strategies in order to better capture this market

Women's activewear trends and drivers: A systematic review

segment. Yet, like other themes addressed in this review, there is a lack of research regarding the consumer needs and experiences of girls and women.

The life stage of a woman is an important variable for activewear producers and marketers to consider. This is not only from the perspective of their consumer behaviour but also their changing physical activity patterns across the lifespan (Hajkowicz et al., 2013). When appealing to the youth market, consider that girls beginning high school are at an age where they are deciding if and what sport or physical activity is right for them (Eime et al., 2013, Institute of Youth Sport, 2011). In many cases that choice is non-organised sport and physical activity (Australian Bureau of Statistics, 2012a, Australian Bureau of Statistics, 2012b, Eime et al., 2013, Opinion Leader, 2011, Roy Morgan Research, 2014). At the other end of the lifespan, the growing market for the mature-age woman should not be underestimated because with an aging population come more older women who seek healthier and more active lives (Australian Bureau of Statistics, 2013, Hajkowicz et al., 2013).

Marketing to Women

The literature exploring activewear consumer variables largely fails to take gender into consideration. However, an industry report found that companies who wish to target female consumers need to understand the lived context of the modern woman (Jack Morton, 2012). This means marketers need to let go of old gender stereotypes and understand the realities of women's lives who want to engage with brands on their own terms. The report calls this 'women's new realities'. Marketers need to consider that women are highly involved in technology and social media, use it to research and purchase products and to spread word-of-mouth about products they like. An important factor here is that women are gaining purchase power. For example, a review of the Australian womenswear market found that women have

Women's activewear trends and drivers: A systematic review

moderate overall buyer power (MarketLine, 2014). This means that women's consumer behaviour has some power to shape the market and as such women's decision-making power should not be ignored. Consequently, the literature offers some recommendations for good practice in marketing to women. One recommendation involves building a relationship with female consumers (Jack Morton, 2012). This relationship can be aided by determining what women actually want rather than assuming to know what they want. To achieve this, a marketing experience that is tailored to women (via media, content type, or the type of experience) is required that does not patronise women but appeals to both genders. In addition, brand experiences should communicate how a brand can fit into women's lives.

Some research has sought to explore the question of what women consumers actually want, specifically in relation to activewear. One study proposed the importance of including social and emotional value when exploring what women value in activewear (consumer perceived value) (Chi and Kilduff, 2011). Thus, considering messages about how a product could make female consumers feel good, provide pleasure or social approval, is as important as messages about product price and quality. Another study suggested that marketing to what women want can be a balancing act (Heineken, 2013). It found that the posters on a large online forum for women's activewear consumers valued the use of 'real' women with real lives balancing many of life's responsibilities in marketing imagery. Yet, they also liked seeing the 'real' woman as being an amazing athlete. Thus, while they rejected idealised images of women in advertising they replaced it with an idealised notion of the super woman who can balance all her responsibilities and still be ultra-fit. This suggests that despite the replacement of one unrealistic aspirational image with another, marketers of activewear may benefit from appealing to this balance between 'real women' and 'aspirational women'.

Thus, some evidence has sanctioned the need to determine what women really want when marketing to them. However, any attempt to do so in regard to activewear consumption

Women's activewear trends and drivers: A systematic review

should consider the types of physical and leisure activities that women actually pursue. If clothing design, branding and marketing can appeal to not only the contexts in which women will wear their garments but also where they may wear them into the future, they could maximise their appeal to the female market.

Conclusion

This review is the first to identify what knowledge exists and more importantly what gaps are evident in understanding the drivers and industry trends that pertain to female consumers of activewear. Very few studies have sought to identify the specific consumer context of women and many missed the opportunity to make meaningful and reliable gender comparisons. This review is also the first to link marketing and design of women's activewear to the needs of female consumers based on their actual patterns and trends in physical activity.

There is a clear knowledge gap regarding female consumers of activewear. This gap limits the industry's ability to effectively market to and cater for the activewear consumption needs of females. This review begins to partially fill this gap. What emerges strongly from the review is the relationship between the context in which people wear activewear, including consumer profiles, and their purchasing decision-making. As such, understanding the patterns and trends in female participation in sport and physical activity becomes an important element in understanding and catering for women's activewear needs.

The female participation trend towards unstructured physical activity and a healthy lifestyle needs to be reflected in the products and marketing of activewear brands to demonstrate that they understand the lived context of their female consumers. Trends, particularly in Australia, predict that over the next 30 years non-organised physical activity and new adventure and lifestyle sports will be increasingly favoured. This trend will continue to influence women's activewear needs and consumer behaviour.

Women's activewear trends and drivers: A systematic review

Another trend in the activewear industry is the consumer led incorporation of fashion into the marketing and consumption of activewear brands. This needs to be seen in light of the use of activewear as casual daywear, work-wear, sleepwear and evening wear. There also needs to be an acknowledgement of the desire for the incorporation of more fashion into the design of apparel for women who are more serious about their sport participation.

Experts have recommended that brands build a relationship with female consumers in order to effectively market to them. This is made difficult if activewear brands do not understand the needs of females, the key influences on what encourages females to purchase activewear, or failing to recognise some of the emerging or predicted trends that were described in this report.

In light of the current review, the important message for researchers is to consider gender, and attendant needs and influences, when examining activewear consumer behaviour and devising consumer lifestyle profiles. They should also consider how they are informed by data on the ways women are physically active, now and in the future. The current review is the first stage of a larger project funded by the Australian Sporting Goods Association. Subsequent stages will complement and extend this review by gathering focus group and survey data from Australian women to further investigate their current and future activewear consumption. While this review has focused on the Australian context, it also investigated international academic and industry literature. Future research should look to explore and compare the interaction of female physical activity patterns and their consumer profiles in other markets and countries.

The importance of this review for producers and marketers of activewear is to highlight the range of variables to consider when designing and marketing activewear to women.

Additionally, there is the importance of targeted market research that takes into consideration women's real-life contexts. However, this can be seen as a two-way relationship where

Women's activewear trends and drivers: A systematic review

physical activity trends of females can inform producers of what the market wants, but also where market driven trends in female activewear consumption can influence the direction of the physical activity market.

References

- 10 Thousand Feet (2015). Australian Sporting Goods Association: Internationally Branded Sporting Apparel - October to December 2014 quarter.
- Asian Textile Journal (2005). "Sportswear changing trends". *Asian Textile Journal*, 14, pp. 83-84.
- Australian Bureau of Statistics. (2012a). "Participation in Sports and Physical Recreation, Australia, 2011-12 (cat. no. 4177.0)". Available: <http://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/4177.0Explanatory%20Notes12011-12?OpenDocument> (Accessed 02 April 2015).
- Australian Bureau of Statistics. (2012b). "Children's participation in cultural and leisure activities, Australia. April, 2012 (cat no 4901.0)". Available: <http://www.abs.gov.au/ausstats/abs@.nsf/mf/4901.0> (Accessed 02 April 2015).
- Australian Bureau of Statistics. (2013). "Populations projections Australia 2012 (base) to 2101.". Available: <http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/3222.0main+features42012%20%28base%29%20to%202101> (Accessed 02 April 2015).
- Australian Government (2012). Australian Government response to the Senate Environment, Communications, Information Technology and the Arts References Committee report: About Time! Women in Sport and Recreation in Australia. Canberra.
- Australian Sports Commission (2015). Play.Sport. Australia: The Australian Sports Commission's Participation Plan.: Canberra.
- Bae, S. and Miller, J. (2009). "Consumer Decision-Making Styles for Sport Apparel: Gender Comparisons between College Consumers". *ICHPER-SD Journal of Research*, 4, pp. 40-45.
- Bramel, S. (2005). "CHAPTER 3: Key trends in sportswear design". In: Shishoo, R. (ed.) *Textiles in Sports*. Woodhead Publishing, Cambridge.
- Caperchoine, C., Mummery, W. K. and Joyner, K. (2009). "Addressing the challenges, barriers, and enablers to physical activity participation in priority women's groups". *Journal of physical activity & health*, 6, pp. 589.
- Chi, T. and Kilduff, P. P. D. (2011). "Understanding consumer perceived value of casual sportswear: An empirical study". *Journal of Retailing & Consumer Services*, 18, pp. 422-429.
- Cohen, M. (2014). "Dressing for Success". *The NPD Group Blog* [Online]. Available: <https://www.npdgroupblog.com/dressing-for-success/#.VTSf1qLPuO0> (Accessed 20 April 2015).
- Confederation of Australian Sport (2013). Retaining the membership of women in sport.
- Cortis, N., Sawrikar, P. and Muir, K. (2007). *Participation in sport and recreation by culturally and linguistically diverse women*, Social Policy Research Centre, University of New South Wales, Sydney.

Women's activewear trends and drivers: A systematic review

- Craike, M. J., Symons, C. and Zimmermann, J. a. M. (2009). "Why do young women drop out of sport and physical activity? A social ecological approach". *Annals of leisure research*, 12, pp. 148-172.
- Dhurup, M., Mafini, C. and Mathaba, R. L. (2013). "Store image factors influencing store choice among sportswear consumers: Baseline findings from South Africa". *Mediterranean Journal of Social Sciences*, 4, pp. 359-370.
- Eime, R. M., Harvey, J. T., Sawyer, N. A., Craike, M. J., Symons, C. M., Polman, R. C. and Payne, W. R. (2013). "Understanding the contexts of adolescent female participation in sport and physical activity". *Research quarterly for exercise and sport*, 84, pp. 157-166.
- Frank, P. (2014). *Modeling young global consumers' apparel brand resonance: A cross-cultural comparison between the United States and Thailand*. 75, ProQuest Information & Learning.
- Hajkovicz, S., Cook, H., Wilhelmseder, L. and Boughen, N. (2013). *The Future of Australian Sport: Megatrends shaping the sports sector over coming decades. A Consultancy Report for the Australian Sports Commission*. CSIRO, Australia.
- Halyk, M. D., Brittain, D. R., Dinger, M. K., Taylor, E. L. and Shephard, J. N. (2010). "Perceived barriers to physical activity among high school freshman females". *Revue phénEPS/PHEnex Journal*, 2, pp.
- Hanlon, C., Morris, T. and Nabbs, S. (2010). "Establishing a successful physical activity program to recruit and retain women". *Sport Management Review*, 13, pp. 269-282.
- Heinecken, D. (2013). "Fit for everything: The framing and consumption of the female athlete in Title Nine". *Feminist Media Studies*, 13, pp. 29-45.
- Higgins, J. and Green, S. (2011). *Cochrane Handbook for Systematic Reviews of Interventions*. In: Higgins, J. & Green, S. (eds.). The Cochrane Collaboration, 2011.
- Ihn Hee, C. (2012). "Consumer's Multi-Channel Choice in relation to Fashion Innovativeness and fashion items". *International Journal of Management Cases*, 14, pp. 27-34.
- Institute of Youth Sport (2011). *Understanding psycho-social attitudes towards sport and activity in girls*. Loughborough University: Loughborough University.
- Jack Morton (2012). *Beyond Pink: Marketing to Women 2012*.
- Jones, C., Jancey, J., Howat, P., Dhaliwal, S., Burns, S., Mcmanus, A., Hills, A. P. and Anderson, A. S. (2013). "Utility of stages of change construct in the planning of physical activity interventions among playgroup mothers". *BMC research notes*, 6, pp. 300.
- Ko, E., Kim, K. H., Kim, S. H., Li, G., Zou, P. and Zhang, H. (2009). "The Relationship among Country of Origin, Brand Equity and Brand Loyalty: Comparison among USA, China and Korea". *Journal of Global Academy of Marketing Science*, 19, pp. 37-49.
- Ko, E., Taylor, C. R., Sung, H., Lee, J., Wagner, U., Martin-Consuegra Navarro, D. and Wang, F. (2012). "Global marketing segmentation usefulness in the sportswear industry". *Journal of Business Research*, 65, pp. 1565-1575.
- Ko, E. and Zhang, H. a. O. (2009). "The Moderating Effects of Nationality and Lifestyle on the Relationship between Brand Equity and Purchase Intentions". *International Journal of Human Ecology*, 10, pp. 39-54.
- Leone, L. A. and Ward, D. S. (2013). "A Mixed Methods Comparison of Perceived Benefits and Barriers to Exercise between Obese and Non-Obese Women". *Journal of physical activity & health*, 10, pp. 461.
- Marketline (2014). *MarketLine Industry Profile: Womenswear in Australia*.
- Ministerial Advisory Committee on Women and Girls in Sport and Recreation (2013). *Start Playing, Stay Playing: Summary of Evidence*.
- Npd Group. (2013a). "NPD Reports Strong Sales In Activewear and Athletic Footwear From January-August 2013". *NPD.com* [Online]. Available: <https://www.npd.com/wps/portal/npd/us/news/press-releases/npd-reports-strong-sales-in-activewear-and-athletic-footwear-from-january-august-2013/> (Accessed 20 April 2015).

Women's activewear trends and drivers: A systematic review

- Npd Group. (2013b). "Fitness Fashion: Workout Motivation or Simply Loungewear?". *NPD.com* [Online]. Available: <https://www.npdgroup.ca/wps/portal/npd/ca/news/press-releases/fitness-fashion-workout-motivation-or-simply-loungewear/> (Accessed 20 April 2015).
- Npd Group. (2013c). "The NPD Group Reports Kids' Activewear Grew In Double-Digits". *NPD.com* [Online]. Available: <https://www.npd.com/wps/portal/npd/us/news/press-releases/the-mpd-group-reports-kids-activewear-grew-in-double-digits/> (Accessed 20 April 2015).
- Npd Group. (2014). "Activewear Growth Sets Pace For Overall Apparel Market". *NPD.com* [Online]. Available: <https://www.npd.com/wps/portal/npd/us/news/press-releases/activewear-growth-sets-pace-for-overall-apparel-market/> (Accessed 20 April 2015).
- Npd Group. (2015). "A More Casual, Active Lifestyle Drives Fashion Sales Growth in 2014, Reports NPD". *NPD.com* [Online]. Available: <https://www.npd.com/wps/portal/npd/us/news/press-releases/2015/a-more-casual-active-lifestyle-drives-fashion-sales-growth-in-2014/> (Accessed 20 April 2015).
- O'flynn, G. H. and Lee, J. (2010). "Committed young men and well-balanced young women: private schooling, physical activity and the classed self". In: Wright, J. & Macdonald, D. (eds.) *Young People, Physical Activity and the Everyday*. Oxon: Routledge, London.
- O'driscoll, T., Banting, L. K., Borkoles, E., Eime, R. and Polman, R. (2014). "A systematic literature review of sport and physical activity participation in culturally and linguistically diverse (CALD) migrant populations". *Journal of Immigrant and Minority Health*, 16, pp. 515-530.
- Opinion Leader (2011). *Women and Informal Sport: A Report for the Women's Sport and Fitness Foundation*. London.
- Pal, S., Cheng, C., Egger, G., Binns, C. and Donovan, R. (2009). "Using pedometers to increase physical activity in overweight and obese women: a pilot study". *BMC Public Health*, 9, pp. 309.
- Payne, W. R., Reynolds, M., Brown, S. and Fleming, A. (2003). *Sports role models and their impact on participation in physical activity: a literature review*. School of Human Movement and Sport Sciences, University of Ballarat Melbourne.
- Pentecost, R. and Andrews, L. (2013). "The importance of importance: Its impact on decision-making in mall retail categories during an economic downturn". *Journal of Retailing & Consumer Services*, 20, pp. 463-470.
- Quester, P., Pettigrew, S., Kopanidis, F., Rao Hill, S. and Hawkins, D. (2014). *Consumer Behaviour: Implications for Marketing Strategy*, McGraw-Hill Education, Australia.
- Rahulan, M., Troynikov, O., Watson, C., Janta, M. and Senner, V. (2015). "Consumer behavior of generational cohorts for compression sportswear". *Journal of Fashion Marketing and Management*, 19, pp. 87-104.
- Ross, M. (2005). "Hole in one". *Canadian Apparel*, 29, pp. 6-7.
- Roy Morgan Research. (2014). "More Aussie women getting sporty". Available: <http://www.roymorgan.com/findings/5876-more-aussie-women-getting-sporty-201410212154> (Accessed 02 April 2015).
- Rugolo, M. (2013). "Yoga in my sleep". *The NPD Group Blog* [Online]. Available: <https://www.npdgroupblog.com/yoga-in-my-sleep/#.VTScD6LPuO0> (Accessed 20 April 2015).
- Rynarzewska, A. and Mcclung, S. (2012). "Using Affect as a Tool for Target Market Homogenization: Sportswear Advertising Among the Community of Sports Participants". *Florida Communication Journal*, 40, pp. 1-15.
- Sawrikar, P. and Muir, K. (2010). "The myth of a 'fair go': Barriers to sport and recreational participation among Indian and other ethnic minority women in Australia". *Sport Management Review*, 13, pp. 355-367.
- Scheerder, J., Vos, S. and Taks, M. (2011). "Expenditures on sport apparel: Creating consumer profiles through interval regression modelling". *European Sport Management Quarterly*, 11, pp. 251-274.

Women's activewear trends and drivers: A systematic review

- Sebire, S. J., Haase, A. M., Montgomery, A. A., McNeill, J. and Jago, R. (2014). "Associations between physical activity parenting practices and adolescent girls' self-perceptions and physical activity intentions". *Journal of physical activity & health*, 11, pp. 734-740.
- Suddin, L., Samsinar Md, S. and Kenny Teoh Guan, C. (2014). "Moderating Role of Product Involvement on the Relationship Between Brand Personality and Brand Loyalty". *Journal of Internet Banking & Commerce*, 19, pp. 1-16.
- Theriault, D. S., Shores, K. A., West, S. T. and Naar, J. J. (2010). "The Association of Location and Social Context with Physical Activity Enjoyment in a Population of Able Bodied Rural Aging Women". *Annals of Leisure Research*, 13, pp. 4-26.
- Tong, X. and Hawley, J. M. (2009). "Measuring customer-based brand equity: Empirical evidence from the sportswear market in China". *Journal of Product and Brand Management*, 18, pp. 262-271.
- Williams, C. M. (2011). *'The rise of skirt culture': A multi-faceted analysis of running skirts and the Skirt Chaser 5k Race Series*. 71, ProQuest Information & Learning.
- Wilson, A. N. and Dollman, J. (2009). "Social influences on physical activity in Anglo-Australian and Vietnamese-Australian adolescent females in a single sex school". *Journal of Science and Medicine in Sport*, 12, pp. 119-122.
- Wray, A. Z. and Hodges, N. N. (2008). "Response to activewear apparel advertisements by US baby boomers: An examination of cognitive versus chronological age factors". *Journal of Fashion Marketing and Management*, 12, pp. 8-23.
- Yee, W. F. and Sidek, Y. (2009). "Influence of brand loyalty on consumer sportswear". *International Journal of Economics and Management*, 2, pp. 221-236.
- Yungblut, H. E., Schinke, R. J. and Mcgannon, K. R. (2012). "Views of adolescent female youth on physical activity during early adolescence". *Journal of sports science & medicine*, 11, pp. 39.
- Yusoon, L., Yongjoo, L. and Hyuncheol, K. (2011). "A Development Study for Fashion Market Forecasting Models - Focusing on Univariate Time Series Models". *Journal of Fashion Business*, 15, pp. 176-203.

Women's activewear trends and drivers: A systematic review

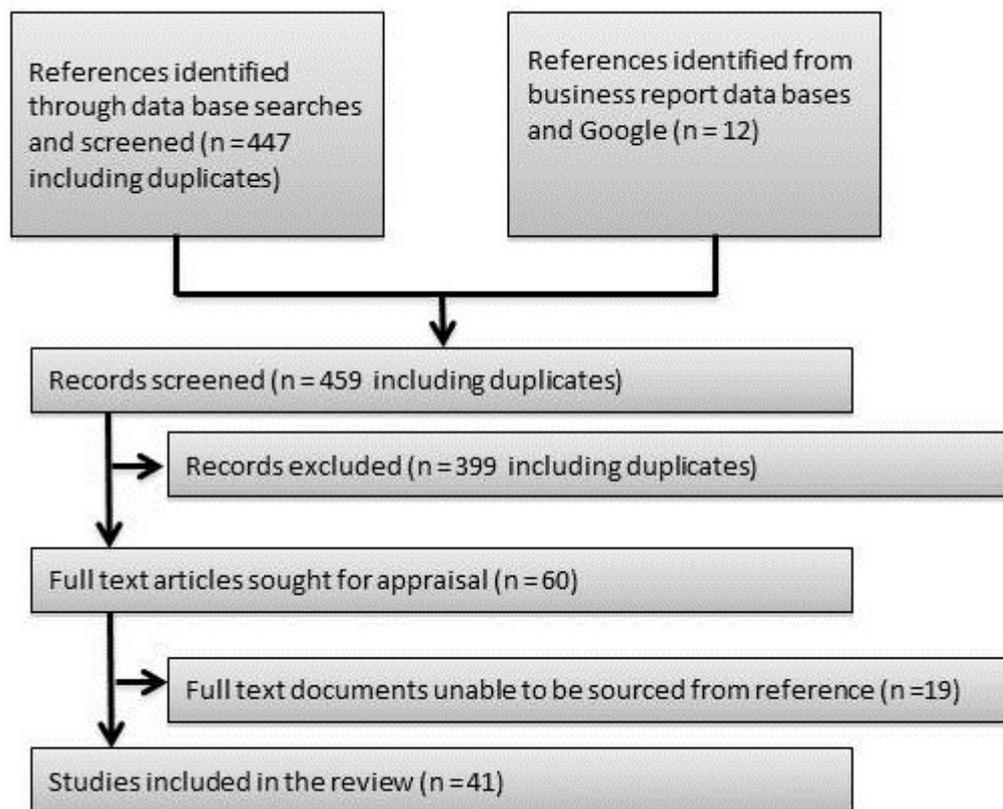


Figure 1: Results of the Literature Search

Women’s activewear trends and drivers: A systematic review

Table 1: Influences on Activewear Purchasing Decisions

Decision Making	Influences
Activewear Product Selection	<p>When compared to men, women are <u>more likely</u> influenced by;</p> <ul style="list-style-type: none"> • 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 <u>equally likely</u> to be influenced by; • Price (price aware and looking for a good deal) • Fashion (looking for new innovative brands and fashion) <p>(Bae and Miller, 2009)</p>
Store Selection	<ul style="list-style-type: none"> • Overall, women tend to use a bigger range of purchase locations (choices being, department stores, independent franchise stores, discount stores, mega shopping marts, fashion speciality 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 • Hierarchy of store selection criteria in order from highest to lowest rank: <ul style="list-style-type: none"> ○ ‘sales assistance’ (their appearance and service) ○ ‘in-store induced appeals’ (gift vouchers, in-store advertising, and mark-downs) ○ ‘promotional/brand availability’ (availability of special offers, exclusive brands and branded labels) ○ ‘store accessibility’ (layout, mall location, aisle location, and operating hours) ○ ‘store appeal’ (variety of brands; and the appeal of in-store displays, the store entrance/exit, and the exterior design) ○ ‘store atmospherics’ (attractive, fashionable, stylish decorations, lightings, temperature) <p>(Ihn Hee, 2012, Dhurup et al., 2013)</p>
Activewear purchaser profiling	<ul style="list-style-type: none"> • Those who, participate in, or watch sport (96.6%) are almost twice as likely to purchase sports apparel as those who don’t participate or watch (54.5%). Although, still half of the non-participants/watchers buy sports apparel • People who participate more in sport, like sporting goods, and have a higher education are more likely to buy and spend higher amounts of money on sports apparel • People who watch a lot of sport on TV prefer to spend lesser amounts on sports apparel <p>Sport active women, aged 41 to 45 years, with a university degree, has a sport active partner and friends, lives in a small family, has a highly favourable attitude towards sporting goods and rarely watches sports on TV are twice as a likely as any other group to purchase sport apparel.</p> <p>(Scheerder et al., 2011)</p>

Women's activewear trends and drivers: A systematic review

Table 2: The Activewear Purchase Behaviour of Baby Boomer and Generation Y Women (Rahulan et al., 2015)

Dimension	Generation	
	<i>Baby Boomers</i>	<i>Generation Y</i>
General product orientation	Look for durability and size range	Look more for comfort and style
Material/design	Odour resistance and sun protection is important	Impact on sport performance by the garment is important
	Spend more time testing the construction quality of a garment	Prefer to look for visual information about the garment on the tags and other printed material
Production information needs and decision making	Take less time to make a purchasing decision	Are more inquisitive and want to know more about a product
	When reviewing marketing, do not take much time to read advertising product detail	In marketing, the technical aspects and price of the product are important, they are tech savvy and knowledge hungry
Store selection	Prefer a physical sports store, and to try the garment on for fit	Prefer a physical sports store, but online shopping is much more preferred
Price consideration	Price is less important	Price is more important