

ANNIVERSARY PERSPECTIVE: 20 YEARS ON

In 1995, textile management consultant David Rigby outlined his thoughts on **present and future markets for sports- and leisurewear** in *WSA's* first issue. Twenty years on, Alexandra Zakharova decided to focus on the same markets and review the factors that have contributed towards their growth. Using Rigby's original article as a starting point, it has led her to consider multiple areas of activity and highlights the importance of the 'Millennials', especially women, for the sector's further development.

Looking into the future market with the benefit of hindsight

The 'Millennials' are not gender specific; there is much debate about their characteristics (entitlement, narcissism, confidence, tolerance, civic-mindedness) and about the years covered by their birth, somewhere between the mid-1980s and 2004 – but this generation would also encompass those with a fresh attitude to sport, leisure... and a healthy lifestyle, with an accent on fitness and looking good.

The change in the sectors covered by *WSA* has become more apparent since the turn of the century and, with more importance being attached to ever-increasing obesity found in both developed and developing nations, one can forecast with some degree of certainty that the sport and leisure industries are going to

grow. It will not necessarily cure the problem of obesity and the health problems associated with it but the sector might encourage more sport participation and physical activity.

An Olympic legacy

Analysis of figures would seem to support this. In the United Kingdom, for example, despite the economic recession affecting the world since 2008, the sportswear market remained strong,



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Pilates workout. The training exercise saw a 491% increase in popularity in the US between 2000-2007.

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with an estimated increase in sales of 17.9% in the five years to 2014. The growth has been attributed to a number of factors including consumer lifestyle changes and sporting events. The 2012 Olympics in London had some influence, even if the arguments continue about the numbers of people participating in specific sports. It must surely also be attributed to a change in the perception of sportswear which has led to adaptation and adoption of sportswear as leisurewear.

Despite arguments about the legacy of 2012, research by Sports England's Active People Survey outlines that overall participation rose by 4.7% to reach 15.5 million people from its 2008-2011 base, and it is predicted to rise to 16.2 million by 2018. The growth in sports participation has been especially prominent amongst women; research has shown that 30% of British women were motivated to be more physically active after the performance of Team GB during the Olympics and this fact alone would explain the demand and growth for sportswear.

Consumers and their change in lifestyles have been the main driving force behind the rise of fashionable sportswear. In order to analyse consumers and their different use of sportswear it is essential to understand the different types of sportswear. In his WSA paper, *Present and future Markets for Sports- and Leisurewear*, David Rigby discussed the different types of sports-related garments and consumers. Although written in 1995, it has direct relevance to the sportswear market of today showing that the growth of sportswear has been developing for an extended period of time.

He postulated four types of sportswear consumers: serious sport participant, enjoyment sport participant, lifestyle adaptor and the

fashion dresser. These four different types of consumers purchase different types of sportswear which are categorised as performance sportswear, basic sportswear, sports-related leisurewear and sports-related fashion clothing, and in the process, some of them overlapping. An appreciation of the four types of consumers assists in understanding the thought process behind the purchase of sportswear and consumer brand choice.

Getting serious about sport

The serious participant is someone whose purchases are influenced by the performance elements of the garment and the sportswear is purchased for a high level of participation. These in turn provide credibility to the garments and attract lower level participants and lifestyle adaptors. Clothing chosen and worn by key sports players finds imitators among the general public. One only has to think about the millions of replica football shirts sold around the world to appreciate the market significance.

The enjoyment sport participant is someone who is defined as taking part in social sports activities and probably attends a fitness centre, purchasing medium-low priced sportswear. The lifestyle adopter on the other hand is someone who does not necessarily participate in sporting activities but aspires to be associated with a sports identity — their purchases are influenced by sponsorships and brand advertising. Rigby described fashion dressers as those that purchase sportswear purely for fashion purposes.

This last category should not be ignored by the companies targeting the sector, as recent research indicates that no less than 12% of sportswear purchase is bought for fashion purposes. The blurring of the distinction



SoulCycle static indoor exercise bikes are attracting crowds for 45-minute workouts.

 SoulCycle

between fashion and sportswear led to the term 'athleisurewear', now clipped to athleisure, clothing that can be worn for sport as well as leisure, or perhaps to indicate that the wearer is interested in sport but would not participate.

Motivating the market

This niche has been driven by successful marketing, which communicates ideas about busy lifestyles requiring transitional, functional attire that does not compromise their fashion status. The fashion dresser category is the most likely to buy into athleisure, which is often not intended for exercise purposes. It could be construed that some of the sportswear developed today is not functional but is supposed to be worn as a fashion statement. It may therefore be assumed that it is the lifestyle adopters and fashion dressers who are the driving force behind the rising trend of fashionable sportswear. The lines, indeed, can be blurred.

There appears to be considerable evidence that the focus on fitness has had a major impact on the sector. What is included under the fitness category is diverse: Pilates, aerobics, yoga, dance, spinning and others like its latest derivative SoulCycle or static indoor cycling with extras. The latter is said to transform the way you look and feel with 45-minute workouts; a newcomer to the sector that only started in 2007 in New York but by late 2014 already had 30 centres across five US states and is gaining popularity in the UK. There are other categories such as CrossFit, a fitness company founded by Greg Glassman and Lauren Jenai in 2000 and promoted as both a physical exercise philosophy and a competitive fitness sport.

According to UK research figures, 65% of adults have participated in sport at least once in

2014, while 83% of 16 to 24 year olds were getting active too. Fitness sports continue to outperform traditional sports, with a 4.5% rise in fitness club membership. All of these essentially indoor activities show why there has been solid growth in fitness wear. If more entrepreneurs and enthusiasts create more categories of fitness activities, growth will continue. (There is possibly an analogy to be drawn here to the astonishing growth of 'healthy eating regimes' and a plethora of diets, an area of publishing that shows little sign of slowing down.)

Participation in sports and the purchase of sportswear must also be linked to improvement in quality of life, which David Rigby associated with lifestyles in developed countries. This can be expanded today as research shows that the sportswear market in China has grown strongly in the past 20 years and the country now has some of the biggest brands in the business. The dominance of China's athletes in so many disciplines has been linked to major changes in its society and the spread of wealth and

Table 1 - Number of people in the US participating in fitness activities in 2007 with the highest growth rates since 2000.

Fitness activity	2007 participation	Growth rate since 2000
Pilates	9,192,000	490.9%
Elliptical motion trainer	23,586,000	220.0%
Yoga/Tai Chi	14,072,000	125.2%
Paintball	5,476,000	51.5%
Stretching	36,181,000	47.0%
Treadmill	50,073,000	34.3%
Spinning	6,314,000	34.1%
Running/jogging	41,064,000	30.8%

Source: SGMA

increasing urbanisation. If anyone had doubted China's strength, one only has to recall the Olympics held in Beijing in 2008.

Research on the UK market has also shown that sports participation has mostly been seen amongst affluent socio-economic groups. In lower socio-economic groups, sport participation was hardly evident. From this one can draw the conclusion that increased participation in sport is the result of improving quality of life and that sport participation is also an indicator of wealth when compared with the general community.

There is an argument that fashion mirrors the times and cultural/social climate by reflecting the participation activities of people and sportswear can reflect the person's interest in an active lifestyle and leisure time. This would support other research that sportswear is more likely to be bought by people in urban locations, followed by suburban dwellers and finally by those living in rural locations. It appears that urban living cultivates the demand for cross-functional dressing.

Dressing down for business, dressing up for leisure

The last 20 years have seen significant changes in what was accepted as business attire. From a man's point of view, office work



Robert Downey Jr at a red carpet event wearing a classic suit with trainers.

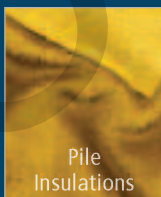
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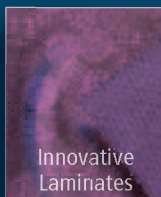
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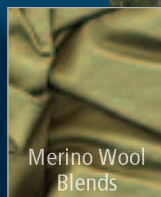
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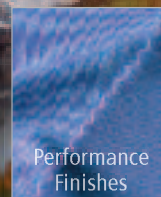
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demanding a suit-and-tie approach, with shoes that reflected that formality. Recent times have shown an acceptance of casualwear, with the advent of Dress-Down Friday, which has now become Casual Fridays. The workplace dress code became much more relaxed and now it is spreading to the other days of the week. Today, a walk through the City of London, always considered a bastion of formal business wear, sees an ever-increasing number of people wearing open neck shirts with suits. The increased use of sportswear adapted and adopted into casualwear can also be the consequence of more people working from home. Formal, face-to-face meetings are being replaced by internet programs; offices in many instances are becoming 'virtual'. A person might be happy to wear running shorts and trainers while working from home – attire that would still be seen by most as being inappropriate for working in a city office environment. Casual Friday will no doubt continue morphing into Easy Everyday.

It is becoming increasingly clear that the lifestyle choices of Millennials, who have been described as the 'on-the-go generation', and especially women have significantly contributed towards the rise of fashionable sportswear. They seek, and are susceptible to, new forms of exercise that provide both a platform for fitness and socialising. Most traditional sports such as golf, swimming and mountain climbing, for instance, involve very few people or players at any one time. Fitness is a totally different category: 2011 research showed that participation in group cycling and aerobics increased between 20-30% over previous years. There is, however, a multiplicity of fitness activities as the US statistics for the period 2000-2007 show, where Pilates participation had grown by

nearly 491% across that time period (see Table 1). Back in 1995, when WSA launched, Rigby highlighted that often the growth of sportswear is linked to new sports, which require performance gear. Twenty years on, this can be linked to the idea that the Millennials' demand for new types of exercise has driven the development and growth of the sportswear market, and specifically fashionable sportswear. UK research in 2014 indicated that 19% of 16 to 24 year olds and 18% among the 25 to 34s bought sportswear clothing for fashion purposes.

The power of women

Women's impact on the sports and leisure sector has been of particular significance and continues to grow. It explains too how the fashion aspects have grown. The rise of sportswear can be linked to the new kind of femininity found through the adaptation of a new lifestyle by modern women who have busy schedules. With Nike opening a women's sportswear shop in London, it is worth noting that women's merchandising now accounts for a major part of its turnover. More and more companies are focusing on young, attractive, affluent mothers as changes in lifestyle make participation possible.

It is even claimed that wearing sportswear plays a role in building one's desired identity and that exercise is no longer just about good health but also a lifestyle statement, even linked to the price tags on expensive sportswear. The argument is that to exercise one must have enough time and money – and be concerned about your identity and status, especially when it is noted how healthy lifestyles are also heavily promoted by the current celebrity culture. Just consider the overwhelming flood of photographs and images of so-called celebrities in sportswear that are seen

in the world's media; to 'lifestyle' one can add the adjective 'aspirational' as influencing market trends. In 1995 one would not have expected glamorous actresses and actors to arrive in couture clothes and trainers on their feet.

This goes beyond the Casual Friday concept: dressing down, wearing sportswear, has become a status indicator and would reinforce the idea that media and the development of celebrity culture has played a great influence in sportswear becoming a mass market trend. Consumers buy into the sports lifestyle as it is more attainable than other aspects of celebrity lifestyle; sports companies see opportunity for their clothing through celebrity endorsement.

Trainers not necessarily for training

Sportswear as a symbol of an aspirational lifestyle has created a connection to consumers' confidence. The uptake of new sports and the purchase of sportswear have been linked to improving self-confidence, with research showing that about a quarter of new sport participants and even more fashion purchasers buy new sportswear for the purpose of improving their confidence. Aspirational image and consumer confidence have become associated with sportswear, which in turn is developing mass-market trends.

One of the biggest adaptations of sportswear as casualwear must be trainers. The ubiquitous footwear has had a major global impact with 80-90% of trainers being purchased for lifestyle purposes rather than sporting activities. In an article in 2014 for the *New York Times*, Alex Williams stated that "the once ungentelemanly sneaker, it seems, has undergone a fashion baptism" and that the distinction between trainers and formal dress has been blurred, as trainers evolved into a fashion accessory suitable for all occasions and even for diners at exclusive restaurants that would previously not have accepted trainers as suitable attire.

Sportswear has become acceptable in different social contexts, although it has been pointed out that it is the change in consumer lifestyles that has made this a more acceptable trend; in terms of future trends it is also important and relevant to consider whether sportswear design has improved and therefore also become more visually appealing to be worn as casualwear. In terms of footwear, it is worth noting that major brands now have a category of trainer called 'lifestyle', which one could expect to be more design orientated, making them more of a casualwear item.

Certainly the changes in the industry of the last two decades have added to a blurring of the definitions and one must conclude that the attitudes of the Millennials and, more importantly, women will continue to be seen as the driving forces of the sportswear and leisurewear markets. 

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