



Timely pointers for manufacturers and merchandisers

# Present and Future Markets for Sports- and Leisurewear

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The market for sportswear has grown enormously over the last 20 years or so, accompanied by an increasing influence of sportswear on the design of other clothing, initially leisurewear and then more formal and fashion clothing. Opportunities have been created for those participants in the clothing supply chain who have understood the mechanisms at work and have recognised the resulting market opportunities.

## Sources of fashion

There is constant fashion change in the world clothing market. New styles and colours are launched at least twice each year but in many market segments, particularly ladieswear, there can be several waves of fashion within a year.

This rapid rate of turnover of fashion demands a constant flow of new fashion ideas. There is, of course, a well developed system of reaching a general consensus on broad fashion trends in any particular season, but this system needs ideas and options on which to work and among which to choose. Indeed, most fashion clothing ideas are a reworking of previous fashions or adaptations of ideas from other forms of clothing.

Design inspiration can come from many quarters, but, in practice, the more usual sources of fashion ideas are

- past history and design archives (eg. long dresses, doublet and hose)
- national dress habits (eg. ponchos, boleros, kimonos, parkas)
- workwear (eg. jeans, sweatshirts, duffel coats)
- recycling of recent fashions (eg. the mini-skirts, flared trousers)
- sportswear (eg. ski-pants, rugby shirts).

## Sportswear as a source of fashion

The fitness boom starting in the late 1970s was the catalyst for a huge growth in participation in sports and fitness activities which gave rise to a very important fashion transfer mechanism. Its

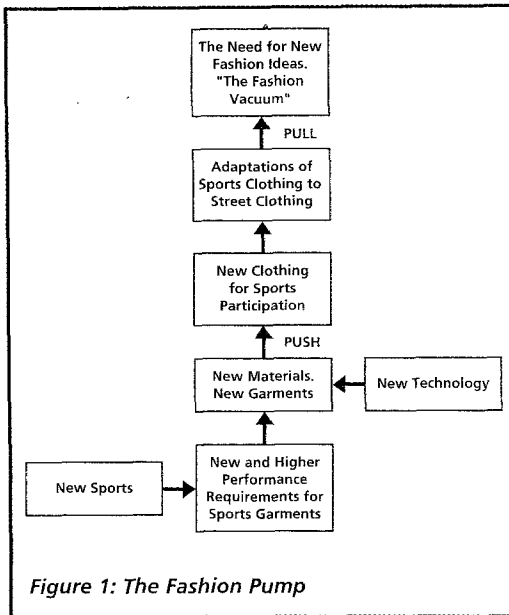


Figure 1: The Fashion Pump

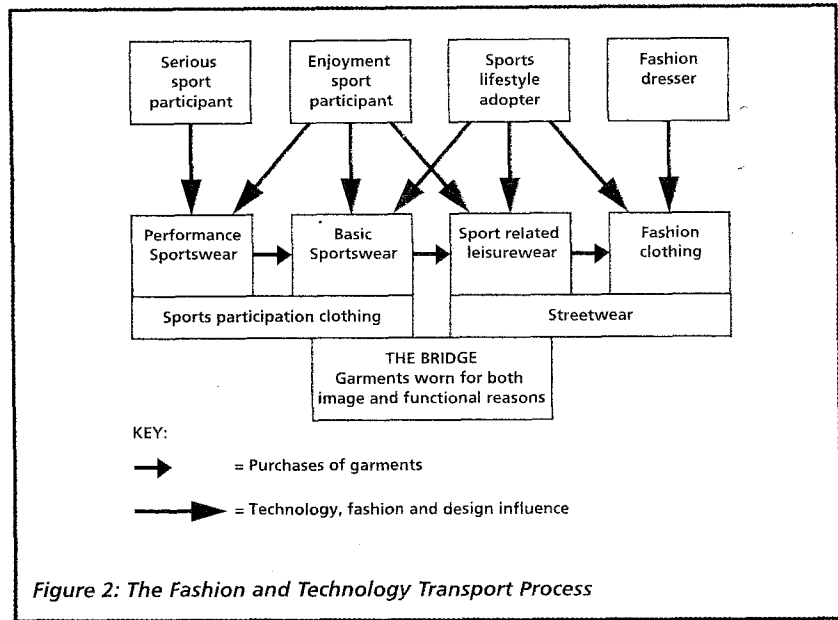


Figure 2: The Fashion and Technology Transport Process

features are summarised here.

- There is an increased desire for participation in fitness and sports activities.
- This gives rise to the need for many kinds of speciality clothing with high, and often new, performance requirements. (See Appendix 1 for a list of typical performance requirements.)
- Many of these performance requirements can be met by using existing materials.
- But some performance requirements have needed product innovation in such areas as fibres, fabrics, coatings, garment design and garment making-up techniques.
- Fitness and sports dressing have now become major features of the self-image and lifestyle of many individuals. The media have made a major impact, especially in rapidly internationalising sports and sportswear.
- This has led to greatly increased consumer demand for sports-derived clothing, usually for leisurewear purposes.
- This has "pulled through" many innovative materials and garments, sometimes in a modified or "stripped-down" form with lower performance levels.
- Fashion clothing designers and manufacturers have adapted and modified sports garment design and the fabrics developed for sportswear in producing their collections of more formal clothing.

**THE 'FASHION PUMP'**

The Fashion Pump transfers through to streetwear the innovation arising in sportswear. This is shown schematically in Figure 1 where the PULL of the constant need for new fashion ideas (the Fashion Vacuum) works together with the PUSH from sportswear innovation.

At the heart of the Fashion Pump is a complex mechanism termed "the Fashion and Technology Transport Process", as shown in Figure 2. It describes how the different types of sports

participants/garment buyers, by their buying patterns, play a crucial role in moving sports-inspired garment ideas through to streetwear and fashion clothing. There are four elements which need to be looked at.

- (i) The four generic types of garment buyers of sports-related garments
- (ii) The four generic types of sports-related garments
- (iii) The Bridge, whereby the buying patterns of enjoyment-sport participants and sports lifestyle adopters facilitate the transfer of fashion and innovation across the gap between sports participation clothing and streetwear
- (iv) The relative volumes of the different types of garments.

	TYPES OF BUYERS			
	Serious sport participant	Enjoyment sport participant	Sports lifestyle adopter	Fashion dresser
Reason for purchase	To play sport to the highest possible standard.	To play sport well but mainly for enjoyment.	To identify with the sporting lifestyle.	To be in fashion.
Ranking of factors in the purchase decision				
• basic function	2	1	2	3
• high performance	1	2	4	4
• image	3	3	1	2
• fashion	4	4	3	1
Relative level of spending per garment	High	Low-Medium	Medium	A wide range of prices

Figure 3: Buyers of Sports-Related Garments

**TYPES OF GARMENT BUYERS.**  
(See Figure 3)

**Serious Sport Participant**

The serious participant is influenced in his garment choice almost totally by performance attributes. Purchases tend to be specific and determined by what is required for successful participation at a high level. The player seeks value for money but is prepared to pay high prices for superior garments.

The serious sports participant can provide new products with credibility through use. This in turn, will attract others, including lower-level sports participants and the lifestyle adopter. For example, in the late 1980s surfing clothing became popular. The casual clothing fashion that followed was essentially driven by the true participants who, by their patronage of certain brands and styles, dictated what was worn by the lifestyle adopter. The sponsorship of professional sportsmen is a crucial part of this process of establishing credibility for sportswear brands.

**Enjoyment-Sport Participant**

This is the average active sports club member who plays mainly socially but possibly also in some club and local league competitions. Clothing must be adequate for its purpose and reasonably cheap and look fairly good, since he will often wear it at the club.

**The Lifestyle Adopter**

The lifestyle adopter plays little or no sport but wishes to be associated with the sports image. In effect, he buys into the lifestyle. Brands and styling are major factors in his purchasing decision. His selection of styles and brands is strongly affected by sponsorship and advertising. He has a medium spend per unit but makes frequent purchases as fashions change. Lifestyle adopters are attractive target consumers due to their regular purchasing patterns.

**The Fashion Dresser**

The fashion dresser purchases clothing for its fashion content and is often unaware of, or uninterested in, any sporting connection the garment may have.

**TYPES OF SPORTS-RELATED GARMENTS.** (See Figure 4)

**Performance Sportswear**

Performance in use is the driving force here. Customers want to increase their sporting performance or improve their comfort or safety. Different sports garments have different sub-sets of the performance requirements shown in Appendix 1 to which the creative energies of

	Performance sportswear	Basic sportswear	Sports related leisurewear	Sports related fashion clothing
<b>Customer requirements</b>	Providing superior protection or sporting performance	Comfortable and functional during sporting activity	Conveying an image of, and associated with, sporting activity	Being in fashion
<b>Factors driving growth and innovation</b>	The desire for increased performance. Innovations in fibres, fabrics, etc and garment design.	Cheaper "stripped down" versions of performance sportswear. Some aesthetic considerations.	The spread of particular sports with a highly desirable lifestyle image. Logos, brands. Sponsorship.	The fashion vacuum. Innovations from performance sportswear. Acceptance of sports-related leisurewear
<b>Design emphasis</b>	Performance	Function	Image	Fashion
<b>Example garments</b>	Gore-tex ski-jacket. Lycra cycling shorts. US football uniform. Dancewear. Motor racing kit (drivers and back-up). Swimwear.	Soccer shirts. Tennis socks. Hydrophilic hiking jacket. Tracksuits. Polar fleece. Jogging suits.	Anoraks. Waxed cotton jacket. Shell suit. Nick Faldo golf sweater. NFL sweatshirt. Waterproof casual jacket. Rugby shirt.	Cycling shorts. Patterned tracksuits. Cat suits. Ski-pants. Baseball cap. Shorts. Raincoats.
<b>Sales outlet</b>	Speciality sports shops	Speciality and general sports shops	General sports and leisurewear shops	Fashion shops
<b>Price</b>	High	Medium-Low	Medium-Low	All prices
<b>Total garment volumes</b>	Low	Medium	Medium-High	High

Figure 4: Types of Sports-Related Garments

technologies and garment designers must be applied. Conversely, the developers of new yarns, fabrics, etc., will seek to have them used in performance sportswear to give them credibility in the market through association with successful sportsmen such as racing drivers, golfers, athletes and mountain climbers.

**Basic Sportswear**

This must be cheaper and perhaps more stylish than true performance sportswear while retaining as many of the materials and performance attributes as possible. It is increasingly common to see garments on shop display, festooned with labels and swing tickets referring to the materials from which it is made, the manufacturer's brand name and endorsement by a successful sportsman.

**Sports-Related Leisurewear**

This comes in several forms such as replica soccer kits, golf sweaters, Grand Prix racing team

anoraks and logo sweatshirts. These are worn at home, perhaps by the "couch potato" while watching sport on TV, socially and while watching live sporting events. Some of the fabrics and constructions of true performance sportswear come through into these garments, which sell in much higher volumes, but usually at much lower prices.

### **Sports-Related Fashion Clothing**

This is a sub-set of the large fashion clothing market which draws on the new materials and design ideas generated in sportswear and leisurewear. Its importance in this context is its use of new materials either in their original

sportswear form (eg. Lycra fabrics) or in a modified form (eg. microfibre nylon).

### **THE BRIDGE**

Perhaps the most important part of the fashion transport mechanism is "the Bridge", in which Enjoyment-Sports Participants and Sports Lifestyle Adopters are buying both basic sportswear garments and sport-related leisurewear and garments which can serve both markets (eg. tennis shirts, logo golf sweaters). This has led to rapid market growth and the creation of highly targeted chains of sports shops which cater for both these market segments. Retailers have provided garment designers and

technical development experts with clear targets in terms of garment types, performance levels, price points, etc. which have led to the rapid development of the sports-related leisurewear segment. It has also led to the differentiation of garment ranges by performance level by using different, but often linked, brand names.

## THE VOLUME/PERFORMANCE PYRAMID

The volumes of garments involved increase across Figure 4 from Performance Sportswear to Sports-Related Fashion Clothing accompanied by an overall reduction in the level of performance required. This presents market opportunities, for fibre and fabric producers in particular. This situation is conventionally indicated by the pyramid structure shown in Figure 5.

Garment manufacturing is a much more fragmented business than either fibre or fabric manufacturing. Garment manufacturers are generally not involved in all four garment segments. There are, however, opportunities to be in two of the segments, usually performance and basic sportswear or basic sportswear and sports-related leisurewear. Not all performance-driven or sports-related innovation ends up in the fashion segment. Recent successes have included: Lycra, in many garment forms, such as trousers, hosiery and cycling shorts; Gore-tex in rainwear; Tactel and other microfibres in ladies' outerwear.

## THE FUTURE

The extent to which the growth in sportswear and sports-related clothing will continue in the future will depend on a number of factors.

### Lifestyles

It seems very likely that in developed countries the tendency towards fitness and healthy lifestyles will continue and that participation in sports and fitness will grow accordingly.

### Overall Market Growth

Many developing countries are increasing their total wealth and per capita income. The rapid spread of satellite television is globalising the vision of the healthy lifestyle and spreading knowledge of particular sports and sports-related garments from country to country. Sports clothing and sports-related leisurewear is becoming global in its appeal with the same garments meeting the needs of many national markets. Sports clothing brands are being promoted globally to take advantage of and reinforce these trends.

### New Consumer Market Segments

Perhaps the most promising new lifestyle-defined market segment is the "Third-Agers",

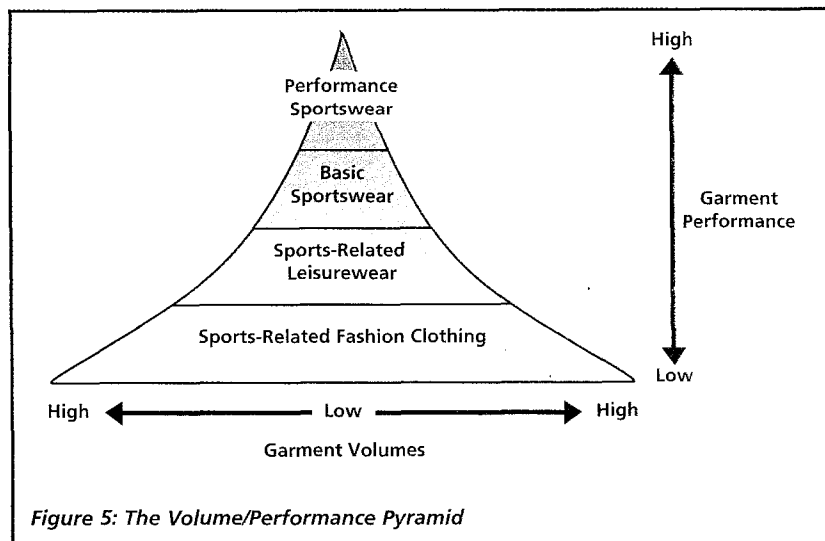


Figure 5: The Volume/Performance Pyramid

the growing and relatively wealthy population of retired people, especially in developed countries. These people, of both sexes, are taking up lifetime sports and pastimes and require clothing that meets their own special performance requirements. These put great emphasis on comfort, fit, ease of putting on and taking off, body control, etc., rather than those requirements related to playing hard and fast. There is large scope for development in materials and products for this market segment with an almost guaranteed follow-through into leisurewear. There is evidence that comfort and fit (in addition to fashion) are generally being increasingly demanded in non-sports garment markets so that innovations for Third-Agers could lead to enormous market opportunities in many other garment market segments.

### New Sports

The supply of new sports requiring new sportswear is unlikely to dry up. Snow-boarding, mountain biking and bungee jumping are some of the latest. Static surf-boarding and climbing walls could be about to take off. A growing move to "tame" sports and bring them indoors or into easily accessible areas can be expected. This will make participation easier and will lead to higher participation rates.

### Innovation

The rate of innovation in new fibres and fabrics applicable to sportswear seems to have slowed down, although the Japanese "shingosen" movement shows an improving ability to produce new materials to meet targeted end-use performance standards. Lyocell fibres will probably be successful in leisurewear, but not via the sportswear route.

### Brands

Brands, in both materials and garments, will become more important, especially in developing



markets. Manufacturers will increasingly invest in sponsorship and promotion to create global brands and then produce different ranges under these brands to meet the different performance/fashion requirements of different market segments.

### Economies of Scale

Market growth will bring significant economies of scale to the development, production and marketing of performance materials.

There will be an increasing demand for better value for money (rather than just low prices) in sportswear and leisurewear markets. People will, however, continue to pay a premium for enhanced levels of performance and fashion.

### Faster Transfer of Innovation

The mechanisms are known to many in the supply chain to the extent that companies are actively looking for opportunities in performance sportswear and then adopting marketing policies which speed up the flow of innovation from small volumes of high performance garments to high volumes of lower performance garments.

In summary, the factors which manufacturers and retailers within the supply chain will need to consider in formulating their business strategies will include:

- New popular sports. What will they be? Can a system of early identification be devised?
- What performance requirements could these new sports have?
- New consumer segments. Which are the growth countries? Which age groups? Which lifestyles? What performance requirements?
- What product differentiation is needed by the different consumer groups?
- What further improvements in performance are needed in existing sports?
- Can these improvements be met by existing materials and technologies?
- What new materials and technologies are required? Where will they come from?
- Brands. How many levels of brand? How, and how widely, to promote them?
- How to generate high volume and economies of scale as quickly as possible.

Manufacturers in all parts of the sportswear and leisurewear supply chain who understand clearly the dynamics of the

sector and how they are changing are the ones likely to win this particular competition.

## APPENDIX 1

### SOME PERFORMANCE FACTORS FOR HIGH PERFORMANCE SPORTSWEAR

1. Protection from:
  - cold
  - heat
  - impact
  - water
  - sun
  - wind
  - fire.
2. Abrasion resistance.
3. Stretch.
4. Body control.
5. Freedom of movement.
6. Lightness.
7. Ease of putting on/taking off.
8. Comfort in use.
9. Low drag in air/water.
10. High friction, stickiness.
11. Management of perspiration.
12. Quietness in use.
13. Visibility.
14. Ease of laundering.
15. Ability to accept patterning and logos, by printing or other methods.