



REAP THE REWARDS

Style in women's fitness has changed significantly over the past couple of decades as health hungry consumers look for the latest choices

Remember when the female fitness options were yoga, callanetics and Jane Fonda's workout? A t-shirt, a pair of tight leggings plus some legwarmers were the norm in those days. Now the opportunities are plentiful.

'Women's fitness' conjures up a variety of activities from power yoga and pilates, to dance, a workout in the gym, pumping some weights, running, as well as jumping on one of 20-30 static bikes in an enclosed room to try your hand at spinning.

Popular

Some of these were available all those years ago, but today they've just become that bit more fashionable - and hence more popular. Others are clearly developments on particular fitness practices offering superior exercise.

Fig 1 - Females 12+ Sports Footwear & Apparel Value Sales % By Country

12 Months To March 2007 - Value %

Source: The NPD Group Sportswear Consumer Panel

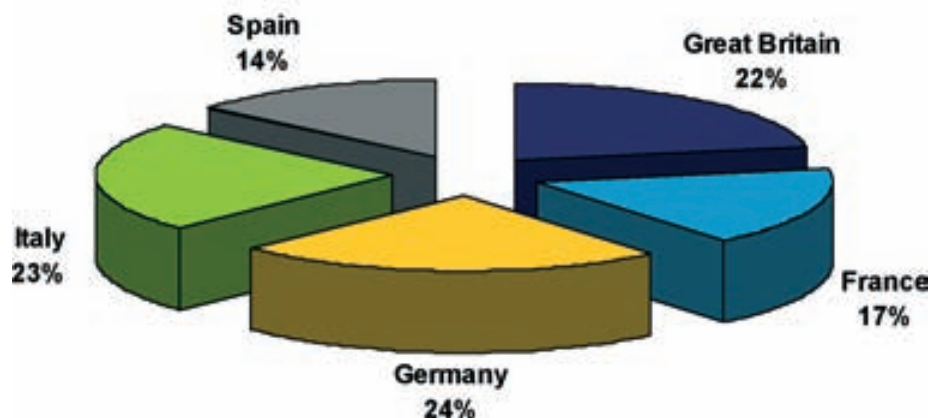
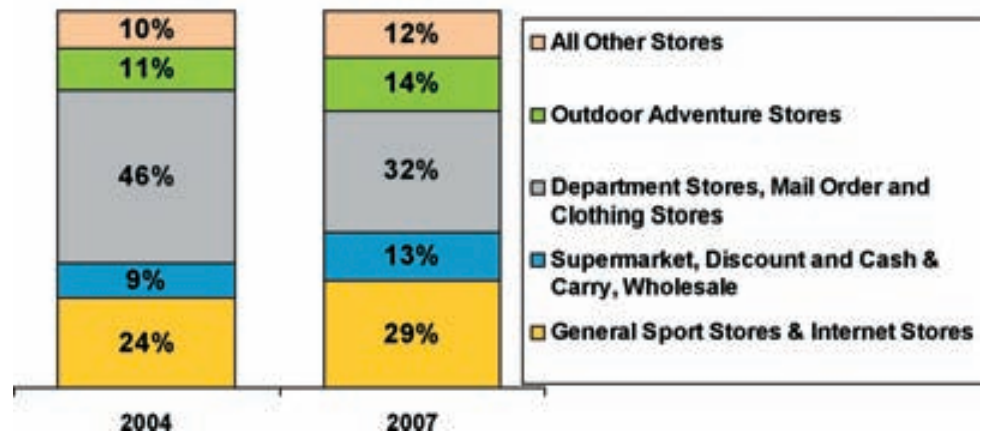


Fig 2 - Retail Type Value Share of Females 12+ Sports Apparel Purchases in Great Britain

Source: The NPD Group Sports Apparel Consumer Panel



Expenditure

In terms of expenditure, women spent a combined €9.5 billion across the big five European markets (Great Britain, France, Germany, Italy and Spain) on sports footwear and apparel in the 12 months to March 2007.

Germany represented the largest country for females 12+ apparel and footwear combined (see fig 1). Great Britain, however, was the largest market for sports footwear and it may come as no surprise that Italian women spent more than their counterparts in the other four countries on sports clothing in the last year.

In Great Britain, wider availability and more brand options have been the primary developments over the past decade. Female focused websites provide a new alternative to the general sports store or high street own-label retailer, and these websites welcome you with an uplifting array of bright colours and a surprisingly large portfolio of brand options from Falke, Pure Lime, Lucy P, Ronhill, USA Pro (which is opening a flagship store in London soon), as well as Nike and adidas product.

Competitive

The retail environment for women's products has become more competitive over the past few years. According to The NPD Groups' sports apparel consumer panel, department stores, clothing stores and mail order stores all declined in the share they took of the money spent on women's sports apparel.

As a group, in 2004 they captured 46 per cent of value sales, whilst in the latest 12-month figures they accounted for just under 32 per cent. Taking the share are two quite different retail channels. General sports (JJB Sports, Sports Direct, JD, specialists, etc) and internet-specific stores (largely sports focused) increased their stake from 24 per cent to 29 per cent, whilst at the cheaper end of the market supermarkets, discount and cash and carry stores grew their presence from nine per cent of value sales to 13 per cent (see fig 2).

In the current climate, with consumers - particularly females - looking for that something a bit different to wear, the smaller brands and retailers look certain to reap the rewards, at least for the short to medium term.

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Products, likewise, seem to have become more popular, with a wider selection available to the female consumer and technology playing a bigger part. Brands and retailers alike have been upping the ante over recent years, focusing their ranges and displays on targeting the style-conscious female.

Retailers have been seen to promote female specific areas in-store, including much heavier reliance on female focused window dressing, whilst the brands have all developed female specific ranges focusing on what's important to the female consumer - colour, fit, cut and technology. Nike's dance ranges, which can be used in and out of the gym as a fashion statement, are a good example of this.

