



# Girl power

The growing women's sports sector is currently worth £1.2billion annually, says The NPD Group

**Producing attractive sports products for women can be a challenging task for manufacturers. It is true that women buy more often than men, but they tend to spend less on their products and theirs is a much more competitive marketplace than the male sector.**

The mainstream sports manufacturers and retailers find themselves up against vertical retailers with own-label offerings that seem to offer better value for money. This isn't necessarily true when you look at the technology that goes into the top sport's brands products for women's fitness and gym gear, but does the consumer notice?

## Valuation

NPD Sports Tracking Europe values the women's market for sports footwear and apparel combined at £1.2billion (defined as women aged 14 years and over). This compares to their male counterparts spending £2.3billion.

Within the women's market Marks and Spencer is a significant player, as are the likes of Next, Tesco and Primark. In fact, Nike, adidas, Reebok, K-Swiss, Puma, Lacoste and Umbro account for only 40 per cent of sales compared to the same brands representing over 50 per cent of the men's sports footwear and apparel market.

Looking deeper into women's expenditure on sports footwear and apparel, two-thirds of the above amount is spent on apparel and a third on footwear. Of the apparel sales the majority is, as expected, used for leisure purposes. But of the remaining amount nearly 20 per cent of product is used for workouts in the gym, while a further 13 per cent is used for aerobics, fitness and dance.

In footwear similar trends can be seen, with just over half of the products purchased used for leisure purposes. However, unlike apparel, nearly a quarter of the remaining spend by women on sports footwear is used for running, an upward

trend noted by NPD Sports Tracking Europe since the inception of charity running events that attracted females to the activity. Furthermore, 15 per cent of footwear being used for sport is for use in the gym and a further 15 per cent for aerobics, fitness and dance.

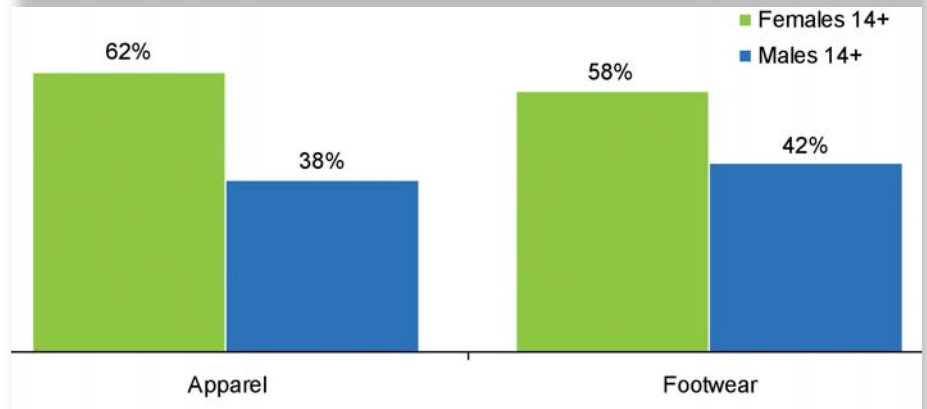
The bottom line is that the combined footwear and apparel market for women using their product in the gym is valued at £108million, while for aerobics, fitness and dance NPD Sports Tracking Europe estimates a market size of £80million. Together this makes a market of nearly £200million - certainly worth brands fighting for.

The problem with this sector is that gym memberships often lapse over time and it can be hard to entice people back until the New Year resolution boom. It has been reported that almost 3.6million people take out new gym memberships in the first two weeks of January; taking into account the average annual subscription, this amounts to £3billion. The



**Fig 1: Percentage of spend in GB on gym/fitness wear by Gender**

Source: NPD GB Sports online Consumer Panel



downside of this is that there is some £200million-worth of unused or wasted gym memberships each year. So what are the large brands doing to make sure that when people are active they are wearing their product?

### Promotion

The Women's Sport & Fitness Foundation (WSFF) has recently launched the 'Sweat in the City'

campaign to understand why women aged between 16-24 are half as active as men of the same age. This scheme hopes to make fitness less daunting for young females and more social. Reebok is launching a campaign in the New Year to promote its new women's fitness range. Using the headline 'Take the boredom out of working out', it plans on easing gym fatigue by picking a team of Reebok Global Instructors to help support the company's new apparel range.

Nike's 'Here I Am' campaign has been gathering speed over the past 18 months and is still promoting new ideas such as 'Conversations from the Inside', which is being used to boost inner confidence in women. adidas usually focuses on the performance side and has been promoting 5K charity runs around London and the UK, a good starting point for less serious runners.

K-Swiss has taken a different approach and installed Anna Kournikova as its international spokesperson. This could have had a negative effect on female purchases, but so far the signs are good - the company has posted strong first-half sales for 2008. Puma and Lacoste's campaigns suggest they are looking more into lifestyle and fashion usage for their female ranges, so the balance of sport brands becomes more fragmented.

This is where the vertical stores begin to emerge, with Marks and Spencer performing stronger than many sports brands - it's currently the third highest selling manufacturer of women's apparel. Looking at the company's usual campaigns, it's not always obvious it produces sportswear, but Marks and Spencer has a partnership in place with the GB Pentathlon team, a sport which British women have a strong history in since its Olympic inception in 2000. This could do with a higher impact promotion to gain further knowledge.

There seems to be plenty of promotional activity in the female sports sector. However, it remains to be seen what campaign or brand induces long-term loyalty in this market. ❖

**The NPD Group monitors the sales of sports footwear and sports apparel in many countries around the world. For more information contact The NPD Group sports team on 01932 355580.**

