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Action-packed! Gen Z and the rise of athleisure wear

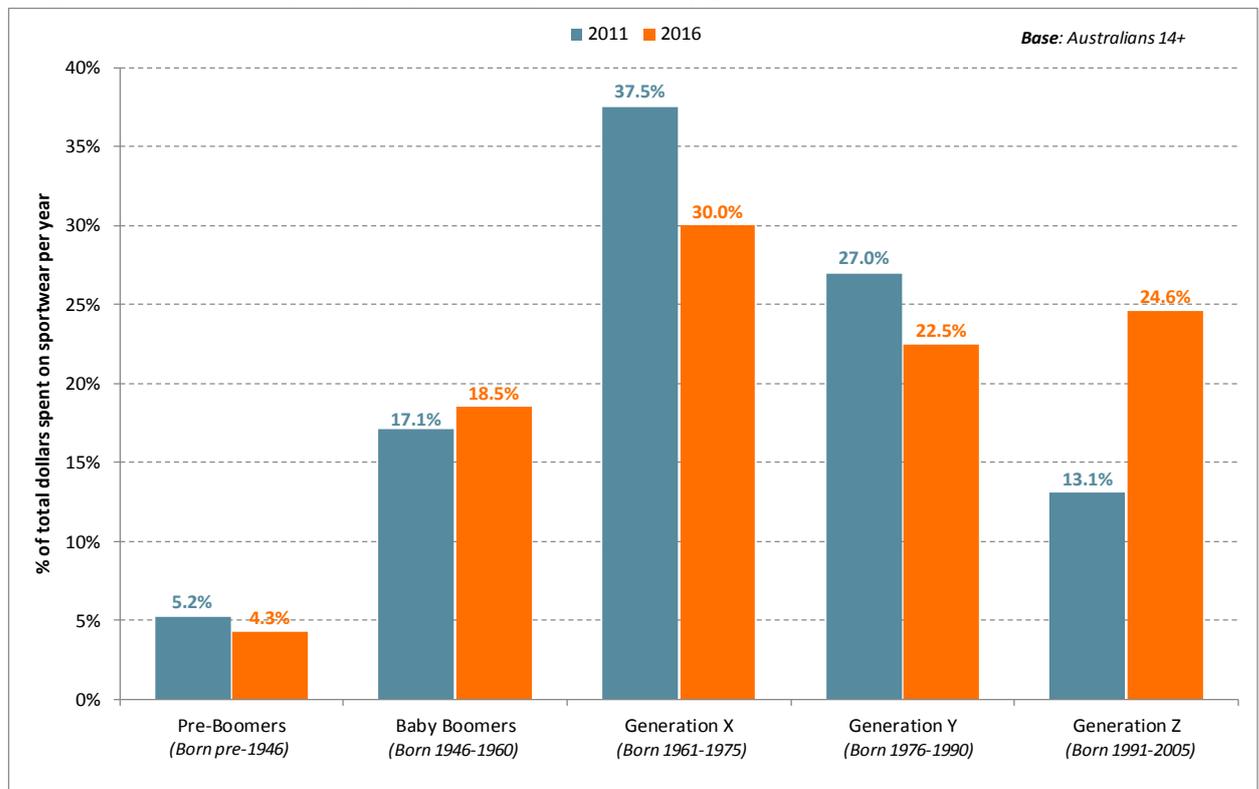
Walk down just about any city street these days, and you're almost guaranteed to pass at least a few people in sportswear. Whether they're on their way to an exercise class, a game of sport or simply to meet friends at a café is immaterial: thanks to the 'athleisure' trend, active-wear is now a viable fashion choice whether exercise is involved or not. And according to the latest findings from Roy Morgan Research, sales of sportswear are on the up-and-up.

Some 1.6 million Australians (8.1% of the population) buy men's and/or women's sportswear in an average four-week period, up from 1.3 million (7.0%) in 2011. This represents an extra 300,000 people purchasing this kind of clothing per four weeks.

Not surprisingly, the dollar-value of the sportswear market has also increased in this time. Between October 2010 and September 2011, Australians spent \$1.1 billion on sportswear; as of September 2016, they are parting with \$1.5 billion per year.

While Generation X accounts for the largest share (31.6%) of total dollars spent on sportswear, this is considerably less than their share back in 2011 (35.9%). In contrast, Generation Z's contribution to Australia's total annual outlay on sportswear has almost doubled in the same period, from 14.2% to 26.4%.

Proportion of total \$ spent per year on sportswear: by generation



Source: Roy Morgan Single Source (Aust), Oct 2010-Sep 2011 (n=18,483) and Oct 2015-Sep 2016 (n=13,769).

Of course, back in 2011, Gen Z was aged between six and 20 years old; flash forward to 2016, and they're now between 11 and 25, so there are more of them in the market for sportswear. Baby Boomers are the only other generation that have grown their share of the total dollars spent on sportswear (currently, they account for 18.6% of total dollars spent, up slightly on 17.9% in 2011).

While it's becoming more common for people to wear this kind of clothing even when they aren't practising some kind of sport or exercise, Roy Morgan data shows that more than 75% of Australian active-wear buyers have played sport or done some kind of formal exercise (eg. gym training, aerobics) in the last three months, making them 29% more likely than the average Aussie to do so.

However, anyone who has passed by a café full of lycra- and legging-clad patrons won't be surprised to learn that people who buy sportswear are 17% more likely than the average Aussie to go to a café for coffee or tea in any given three-month period, averaging almost seven visits in that time (compared with the national average of five visits)!

Norman Morris, Industry Communications Director, Roy Morgan Research, says:

"Spearheaded by brands like Lululemon, Lorna Jane and Nike, and collaborations such as Stella McCartney and Adidas, 'athleisure' wear —or chic active-wear—has been on the rise for some years now. Australia is no exception: not only are more people purchasing sportswear in an average four-week period, but the value of this retail category is increasing. And it looks set to continue its upward trajectory: whereas an old pair of tracky-dacks may once have been acceptable gym wear, it's now almost de rigueur to look good while exercising!

"In fact, some athleisure garments are so stylish they double as streetwear. Celebrities like Beyonce and Kate Hudson have their own active-wear ranges, while others, like Gigi Hadid and the Kardashians, are regularly snapped wearing their designer sportswear out and about. No doubt this celebrity dimension would have something to do with the trend's appeal to young Aussies from Gen Z.

"As we've seen, Generation Z now accounts for much more of the total dollars spent on sportswear than they did in 2011, due both to the increasing numbers of them buying it and the fact that they are spending more on it than they were back then. In fact, the average four-weekly expenditure by a Gen Z sportswear buyer is \$76, up from \$68 in 2011, and second only to Generation X (\$80).

"Roy Morgan data confirms that exercise and sports participation decline with age, and people from Gen Z are not only the most active of the lot, but the only generation to have seen a rise in participation over the past few years. They are also much more likely than other generations to agree with key statements such as 'I wear clothes that will get me noticed' and 'It's important to look fashionable', which goes some way to explaining why athleisure wear is such a hit with them.

“The challenge for sportswear retailers and brands will be to retain these customers as they age, when life starts getting in the way and their sporting activities and fashion-consciousness taper off.

“Of course, with this generation being well known for its interest in health and fitness (Gen Z is 41% more likely than the average Australian to agree that ‘I love to do as many sports as possible’, for example), there is a chance that if brands and retailers go about it the right way, they may be able to build long-term relationships with their youngest customers by encouraging this interest.

“Containing a wealth of demographic and psychographic data about Australian consumers, Roy Morgan Single Source can assist players in the sportswear industry to pinpoint trends, attitudes and behaviours that will enable them to approach the current athleisure phenomenon strategically and efficiently so as to attract the most receptive customers.”

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Related research findings

Learn more about [Men’s Sportswear Buyers](#) and [Women’s Sportswear Buyers](#), just two of Roy Morgan’s many [Retail Product Buyer profiles](#).

Compiled with data from Roy Morgan’s Single Source survey (the largest of its kind in the world, with 50,000 respondents p.a), these ready-made profiles provide a broad understanding of the target audience, in terms of demographics, attitudes, activities and media usage in Australia.

About Roy Morgan Research

Roy Morgan Research is the largest independent Australian research company, with offices in each state of Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research has over 70 years’ experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
7,500	±1.1	±1.0	±0.7	±0.5
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2

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