

SPORTS AND LEISURE WEAR – CHINA – 2023

The growth potential of sportswear lies in expanding its use in different scenarios and becoming a part of daily life. Brands should focus on enhancing fashion attributes while maintaining professional capabilities.



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Sports And Leisure Wear - China - 2023

This report looks at the following areas:

- A market overview together with observations of creative marketing strategies and product innovation activities
- An overview of consumers' spending on various sports and leisure wear sectors
- Investigations into purchase choices, such as brands consumers purchased and their future interest, clothing style preference by sports types
- Decode consumers' ways to get inspiration for outfits
- Surveys on the purchase consideration factors and consumers' overall attitudes towards sports and leisure wear.



The growth potential of sportswear lies in expanding its use in different scenarios and becoming a part of daily life. Brands should focus on enhancing fashion attributes while maintaining professional capabilities.

Overview

Good quality (66%) is the most important purchasing factor when people buy sports and leisure clothing, followed by cost-effectiveness (57%), demonstrating a strong desire for practicality. These findings underline the importance of providing professional, functional products as the backbone of brands' competitive edges in the sports and leisure wear market. On top of this, designs that increase fashionability will be a breakthrough in gaining favour from consumers.

Mass brands can create deep emotional connections with consumers through pioneering brand concepts. For instance, initiatives towards green practices can aid a brand in

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establishing enduring associations with consumers. Brands that choose to take the lead in promoting social responsibilities may appeal to consumers, such as assuming the role of long-term market education to promote niche sports and the spirit of sportsmanship.

Niche brands should take note that community marketing – starting from the core target group – can be the golden ticket to market penetration. However, it's essential not to neglect the importance of product competency in ensuring long-term success. This is often seen in emerging brands where potential consumers are drawn to the brand but do not make repeated purchases.

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Report Content

EXECUTIVE SUMMARY

Key Issues Covered in This Report

- Definitions
- Overview

The Market

- Market Factors
- Key Trends in Marketing Activities
- Product Innovation Trends

The Consumer

- Professional sneakers take the lead in gaining consumer expenditure, as demand surges notably among individuals aged 50-59
 - Graph 1: spending on sports and leisure wear, 2023
- Nike needs to improve its appeal among the youth, Arc'teryx ought to boost brand awareness, lululemon and MLB's challenge lies in removing brand barriers, FILA has potential in converting more sales and On needs to improve brand satisfaction
 - Graph 2: purchased brands and future interest, 2023
- Professional functions remain the core competitiveness, while fashionable designs are equally important
 - Graph 3: purchased occasions for sports and leisure wear, 2023
- Quality and cost performance come first, followed by eco-friendly efforts which help brands build long-lasting connections with consumers
 - Graph 4: consideration factors when purchasing sports and leisure wear, 2023
- Online platforms are the main source of outfit inspiration for activewear
 - Graph 5: ways to get inspirations for sports and leisure outfits, 2023
- Sportswear can boost sports participation
 - Graph 6: attitudes towards sports and leisure wear, 2023

Issues and Insights

What We Think

THE MARKET

Market factors

- The apparel industry expects positive development

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- Graph 7: growth rate of retail sales, by key sector, 2019-23
- Recovery of disposable income growth and consumer confidence provides foundations for stable expenditure increases in clothing
 - Graph 8: disposable income growth rate (price-adjusted), 2019-23
 - Graph 9: confidence about improving financial situation in the next three months, by select confidence level, 2020-23
- Different recreational pursuits necessitate clothing to be suitable for diverse life scenarios
 - Graph 10: out-of-home leisure participation, 2023
- Sportswear might capitalise on the outdoor trends that continue to flourish as part of the healthy lifestyle pursuit
 - Graph 11: ways consumers choose to exercise, 2020-23
- Activewear becoming everyday attire as consumers resort to exercise for vitality and stress relief
 - Graph 12: ways used to relieve stress – exercising, 2020-23
- Fashion awareness is on the rise, with people becoming more mindful of their outfit choices
- Technological development has brought new impetus to the apparel industry
- Increasing number of sportswear brands specialising in niche markets entering the market, accelerating the process of industry upscale

COMPANY AND BRANDS

Marketing activities

- Community marketing connects brands and consumers
- Sports brands open up offline interaction space to connect with consumers
- Differentiate brand identity by dedicating to sustainability
- Build emotional connections through inclusive brand concepts...
- ... and insight into people's mental status
- Marketing creativity should be localised

Product innovation

- International sports brands collaborate with local designers
- Sports brands seeking cooperation with luxury brands to break the boundaries between sports and fashion
- The future of product innovation is to explore new market segments and create differentiated product selling points
- Cycling wear may become the next 'hit' in sportswear...
- ...by absorbing styles from high fashion
- Sports brands launch products that are suitable for all day...
- ...professional sneakers with fashionable designs help consumers seamlessly switch scenarios
- Fashion brand creates lightweight sports product line to facilitate scenario switching while reflecting a free attitude

THE CONSUMER

Spending on sports and leisure wear

- Professional sneakers rank the top in consumers' spending...
 - Graph 13: spending on sports and leisure wear, 2023
- ...with the demand continuing to rise, especially among 50-59s
 - Graph 14: spending on sports and leisure wear – spent more on professional sneakers (a), by gender, age, monthly household income, 2022-23
- A shift to outdoor lifestyle and spending is led by those aged 25-39 in tier 1 cities
 - Graph 15: spending on sports and leisure wear – any spent on outdoor clothing and outdoor hiking shoes, by age, 2023
 - Graph 16: spending on sports and leisure wear – any spent on outdoor clothing and outdoor hiking shoes, by city tier, 2023

Purchased brands and future interest

- Nike needs to improve its appeal among the youth, Arc'teryx ought to boost brand awareness, lululemon and MLB's challenge lies in widening target consumers, FILA has potential in stimulating sales and On needs to improve brand satisfaction
 - Graph 17: purchased brands and future interest, 2023
- Outdoor brands now attract 30-39s and high earners
- Efforts on environmental protection are the selling point in both products and communications
 - Graph 18: purchase factors for sports and leisure wear – haven't bought the brand but interested in buying, 2023

Purchase choice by sport types

- Professional functions are the core competitiveness of sports and leisure wear
 - Graph 19: purchased occasions for sports and leisure wear, 2023
- Niche trendy sports apparel needs more fashionable designs
 - Graph 20: purchased occasions for sports and leisure wear – re-base to those who will participate in the sports and buy clothing specifically, 2023
- 30-39 year olds and high earners expect sportswear that marries both professionalism and fashion
 - Graph 21: preferences for sports and leisure wear in selected occasions – Hiking/camping, by age, 2023
 - Graph 22: preferences for sports and leisure wear in selected occasions – Tennis, by age, 2023
- Market education is needed for cycling wear in lower tier cities
 - Graph 23: purchased occasions for sports and leisure wear – cycling, by city tier, 2023

Consideration factors when purchasing sports and leisure wear

- Quality and cost performance talk first
 - Graph 24: consideration factors when purchasing sports and leisure wear, 2023
- Males care more about brands, while females give attention to fashionable designs
 - Graph 25: consideration factors when purchasing sports and leisure wear, by gender, 2023

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- Eco-friendly efforts help brand build long-lasting connections with consumers
- Consumers invariably look for professional features when purchasing sneakers for various usage occasions
 - Graph 26: consideration factors when purchasing sports and leisure wear, by spending more on professional/casual sneakers, 2023

Ways to get inspiration for sports and leisure outfits

- Most consumers obtain outfit inspiration online
 - Graph 27: ways to get inspirations for sports and leisure outfits, 2023
- Active spenders tend to focus on specific channels
 - Graph 28: number of ways to get inspirations for sports and leisure outfits - Repertoire analysis, 2023
- Applying an outfit influence matrix with official recommendations, word-of-mouth marketing, and KOC's online product reviews
- 30-39s are most susceptible to outfit inspiration from offline store displays
 - Graph 29: ways to get inspirations for sports and leisure outfits - get inspiration from outfits of models in brands' offline stores, by age, 2023
- Variety shows have a strong influence on outdoor core spenders
 - Graph 30: ways to get inspirations for sports and leisure outfits, by spends on outdoor clothing and shoes, 2023

Attitudes towards sports and leisure wear

- Sportswear can boost sports participation
 - Graph 31: attitudes towards sports and leisure wear, 2023
- There is scope for further exploiting 'him economy' in sportswear from the fashion perspective
 - Graph 32: attitudes towards fashion style of sports and leisure wear, by gender, 2023
- Sportswear brands need to have special expertise to appeal to the youth and mid-to-high earners
 - Graph 33: attitudes towards sports and leisure wear - agree with 'Athleisure brands need to be expert in particular category or style', by age, 2023
 - Graph 34: attitudes towards sports and leisure wear - agree with 'Athleisure brands need to be expert in particular category or style', by monthly personal income, 2023
- Co-branding campaigns can target more on the mid-range price market
 - Graph 35: attitudes towards co-branding, CHAID analysis - target group profile of those who agree that athleisure brands co-branding with popular designers/IPs can make the brand more fashionable, 2023

ISSUES AND INSIGHTS

Brands need to develop fashionability on the basis of providing professional functions under the trend of scenarios blurring

- Adaptability to multiple scenarios is the first stepping stone towards a winning strategy
- Fashionability enables sports and leisure brands to thrive and expand
- Balance between professionalism and fashion style is necessary

- Specifically, subdividing product series requires more fashion senses, such as trendy sports
 - Graph 36: Social media mentions of trendy sports on Xiaohongshu, 2022-23

The moat of high-end sports brands lies in providing practical products that serve as spiritual symbols

- High-end market is booming
- Selling professionalism is the primary moat...
- ...and providing spiritual symbols' meaning comes next

Brands need to establish expert images in their segmented fields and invest in long-term market education to cultivate a sense of cultural identity

- Market segmentation is on the rise...
- ...requiring brands to develop an expert image in specialised areas
- Long-term market education is necessary

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- Methodology

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