

# **FITNESS SHIRTS AND HATS IN THE WEIGHT LIFTING INDUSTRY**

**September, 2016**

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# ABOUT THE INDUSTRY

## Industry at a Glance

Gym, Health & Fitness Clubs in 2016

### Key Statistics Snapshot

Revenue  
**\$27.1bn**

Profit  
**\$2.8bn**

Annual Growth 11-16  
**0.1%**

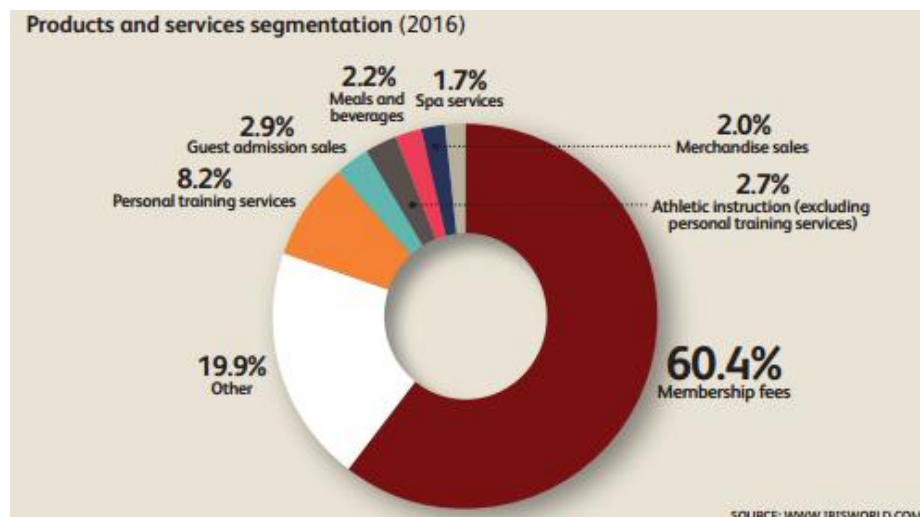
Wages  
**\$9.8bn**

Annual Growth 16-21  
**3.0%**

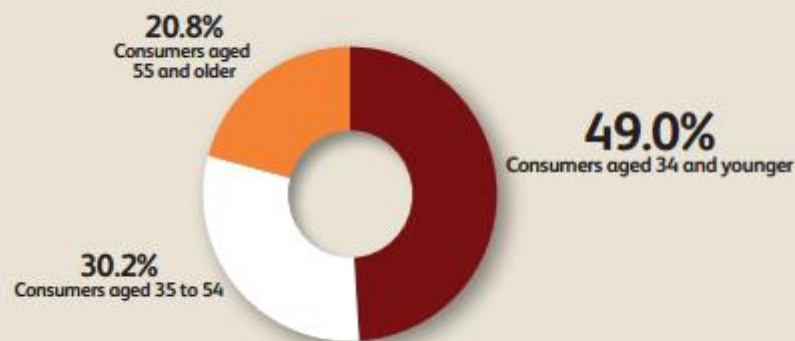
Businesses  
**83,689**



<http://www.atlantafranchiseexperts.com/news/expansion-in-fitness-franchise-industry>



## Major market segmentation (2016)



**Total \$27.1bn**

SOURCE: WWW.IBISWORLD.COM

Over the past decade, the Gym, Health and Fitness Clubs industry has experienced substantial growth in demand and, as a result, the breakdown of the industry's markets has also changed. The aging population has encouraged health and fitness clubs to widen their target demographic beyond the traditional market of 18- to 35-year-olds. Industry operators are increasingly expanding their target market to include 35- to 54-year-olds and individuals aged under 18. An estimated 57.0% of all gym, health and fitness club members are female, a proportion that has increased in recent years. The growth of female participation is likely a result of the rising number of female-only health club facilities.

### **Consumers aged 35 and younger**

Consumers aged 35 and younger are expected to account for 49.0% of total

demographic is the most likely to participate in sports, providing a boon to the industry. Furthermore, activities such as swimming, running and weight lifting appeal to this demographic, which has incited many gym, health and fitness clubs to offer these services to cater to this market segment. Over the next five years, this market segment is expected to remain stagnant, as many industry operators focus on appealing to other market segments.

revenue. According to data from Nielsen, this demographic is more likely than others to participate in numerous fitness class activities, including group training, yoga, Pilates and dance, as well as free weights and weight machines. Over the five years to 2016, this market segment has grown, despite low rates of physical activity among some individuals in this demographic (notably individuals aged 12 and younger). Over the five years to 2021, many gym, health and fitness clubs will likely target individuals aged 17 and younger by offering yoga, karate, kickboxing and outdoor physical activities.

### **Consumers 35 to 54**

Individuals aged 35 to 54 are estimated to make up 30.2% of total industry revenue. According to data from the Physical Activity Council, this

### **Consumers aged 55 and older**

According to the Physical Activity Council, this demographic is the most likely to be inactive: 32.8% of individuals aged 55 to 64 and 37.8% of those over the age of 65 are considered inactive. However, this demographic has a relatively high participation rate in fitness sports as well as outdoor sports. Over the past five years, the burgeoning elderly population has become increasingly health conscious, stimulating demand for industry services.

## Key Statistics

### Industry Data

	Revenue (\$m)	Industry Value Added (\$m)	Establishments	Enterprises	Employment	Exports	Imports	Wages (\$m)	Domestic Demand	Healthy eating index (%)
2007	26,384.1	12,814.9	91,762	86,288	574,805	**	**	8,152.3	N/A	67.1
2008	27,055.1	12,671.1	90,586	84,451	625,278	**	**	8,737.8	N/A	67.0
2009	26,052.0	12,321.8	89,445	82,623	628,270	**	**	8,477.9	N/A	67.7
2010	26,414.4	12,989.9	88,339	81,295	624,153	**	**	8,559.6	N/A	69.0
2011	27,023.1	13,264.3	88,695	81,251	635,392	**	**	8,794.8	N/A	68.4
2012	27,629.9	13,381.7	93,363	85,135	652,084	**	**	8,865.6	N/A	68.5
2013	28,982.6	14,233.3	93,731	85,471	671,447	**	**	9,240.5	N/A	68.6
2014	27,818.6	14,084.4	93,075	84,788	686,219	**	**	9,486.1	N/A	68.7
2015	26,604.2	14,003.0	92,331	84,194	700,630	**	**	9,710.6	N/A	68.9
2016	27,149.2	14,319.7	91,758	83,689	713,171	**	**	9,839.2	N/A	69.0
2017	27,827.9	14,834.6	91,299	83,212	725,652	**	**	10,142.1	N/A	69.2
2018	28,801.9	15,582.0	91,208	82,613	737,988	**	**	10,607.6	N/A	69.3
2019	29,752.3	16,272.2	91,026	81,878	749,057	**	**	11,016.0	N/A	69.4
2020	30,793.7	17,034.9	90,753	81,067	759,544	**	**	11,460.5	N/A	69.5
2021	31,532.7	17,593.1	90,390	80,483	768,659	**	**	11,772.0	N/A	69.5
Sector Rank	4/19	5/19	2/19	2/19	3/19	N/A	N/A	3/19	N/A	N/A
Economy Rank	330/1370	200/1370	108/1370	103/1370	64/1370	N/A	N/A	184/1370	N/A	N/A

<http://www.crossfitnaples.com/wp-content/uploads/2016/02/Crossfit-71394-Gym-Health-Fitness-Clubs-in-the-US-Industry-Report-1.pdf>

## Health Club Industry Overview

- There were 36,180 U.S. Health Clubs (*as listed in the Yellow Pages on January 1, 2016; includes YMCAs, community centers, studios, etc.*), up 4.8% over 2015.
- **55.3 million Americans belonged to at least one of the 36,180 health clubs nationwide.**
- **In 2015, total U.S. Industry Revenues increased 6.1% to \$25.8 billion.**
- More than 64 million Americans utilized a club in 2015.
- Total health club/gym/studio visits surpassed 5 billion.
- Average Rate of Member Retention for IHRSA Clubs: 72.4%
- 187,000 clubs served some 151 million members in 2015.

### Total (U.S.) Health Club Membership by Year (including YMCA, JCC, etc):

2005 – 41.3 million

2006 – 42.7 million

2007 – 41.5 million

2008 – 45.5 million

2009 – 45.3 million

2010 – 50.2 million

2011 – 51.4 million

2012 – 50.2 million

2013 – 52.9 million

2014 – 54.1 million

2015 – 55.3 million

### **Total Number of (US) Health Club:**

#### **As of January 1, year listed.**

2005 – 26,830

2010 – 29,890

2006 – 29,069

2011 – 29,960

2007 – 29,357

2012 – 30,500

2008 – 29,636

2013 – 32,150

2009 – 29,750

2014 – 34,460

2015 – 36,180

<http://www.ihrsa.org/about-the-industry/>

## **Key parameters**

### **Fitness and health clubs in the USA**

Number of health and fitness clubs worldwide	186,850
Number of members of health/fitness clubs worldwide	151.47m

<b>Fitness &amp; Health Clubs in the U.S.</b>	<b>Values</b>
Health club industry revenue in the U.S.	\$25.8bn
Number of health and fitness clubs in the U.S.	36,180
Number of members at health and fitness clubs in the U.S.	55m

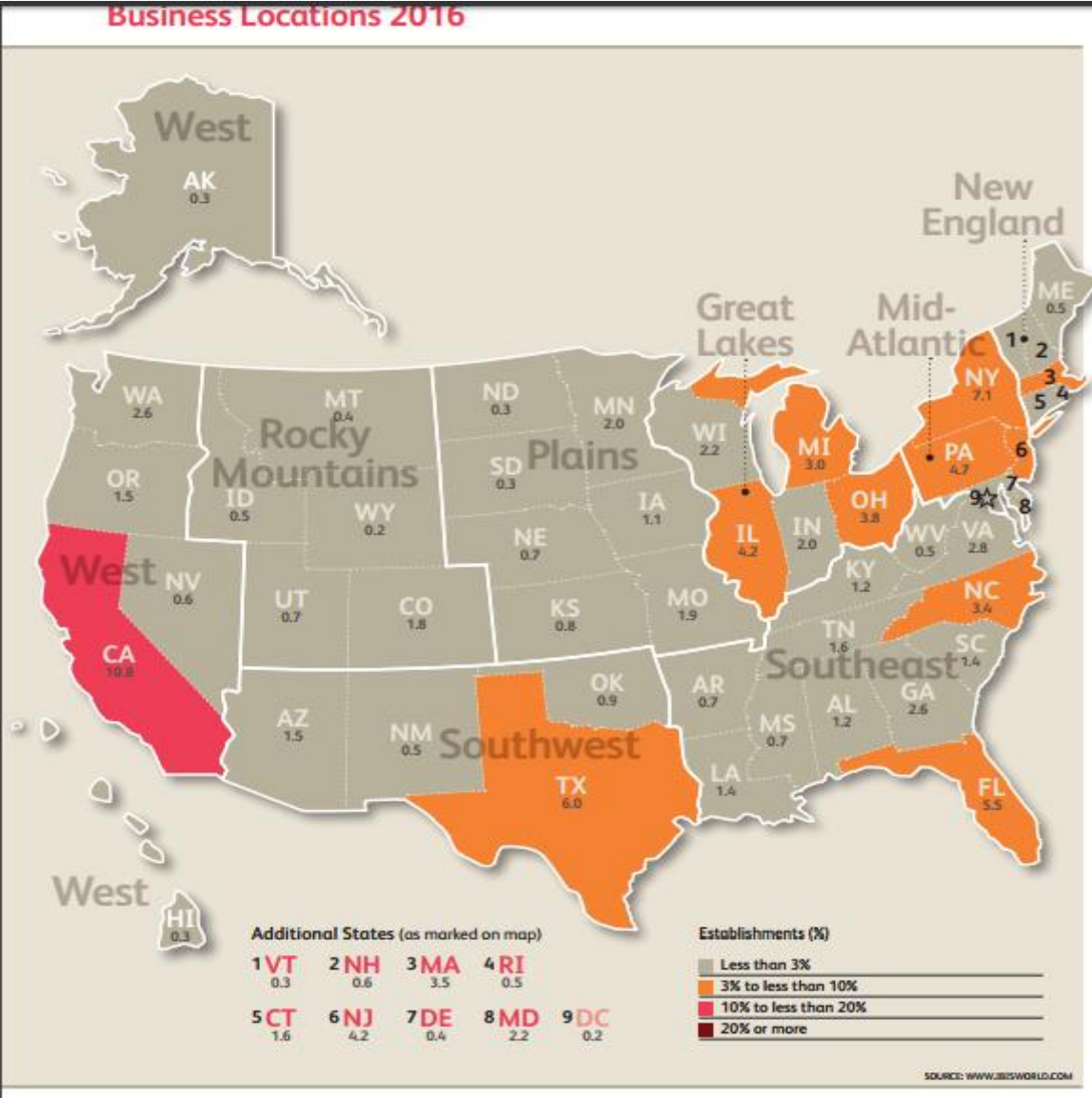
<b>Fitness &amp; Exercise Equipment</b>	<b>Values</b>
Wholesale sales of sports exercise equipment in the U.S.	\$5.12bn
Average retail price of stationary exercise bicycles in the U.S.	\$299.66

<https://www.statista.com/topics/1141/health-and-fitness-clubs/>

According to the U.S. Bureau of Labor Statistics, the number of jobs within the fitness industry are expected to grow by 23.2 percent over the next decade.

The Bureau of Labor Statistics reported that the number of jobs under “fitness and recreational sports centers” reached 484,200 in 2010. By 2020, that number is expected to reach 596,300.

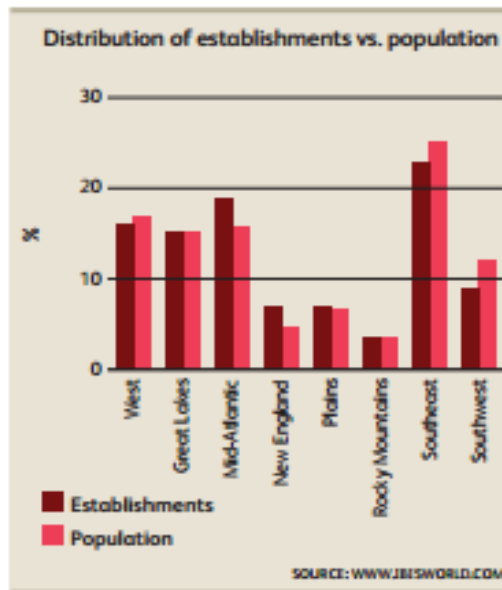
<http://clubsolutionsmagazine.com/2013/02/fitness-industry-jobs-expected-to-see-substantial-growth>



<http://www.crossfitnaples.com/wp-content/uploads/2016/02/Crossfit-71394-Gym-Health-Fitness-Clubs-in-the-US-Industry-Report-1.pdf>

The four regions that encompass the greatest percentages of gyms and health and fitness clubs include the Southeast (23.1% of establishments), the Mid-Atlantic (18.9%), the West (16.1%) and the Great Lakes (15.2%) regions of the United States. Together these four regions account for 73.0% of total industry establishments. Establishments are particularly concentrated in the following states: with 10.8% of establishments in California, New York (7.1%), Texas (6.0%), Florida (5.5%) and Pennsylvania (4.7%). Typically, highly populated regions have a higher portion of industry establishments. This trend can be attributed to consumer's lack of willingness to travel excessive distances to perform exercise or become a member of a fitness or recreational sports center.

However, geographical locations can also determine the popularity of a fitness activity as many areas have climates that are not conducive to particular sports. For example, the population of Maine is twice as likely to participate in ice-skating compared with the national average. Similarly, the population of Arizona is about twice as likely to participate in swimming at a pool compared with the national average. As a result, areas across the United States will have a greater amount of establishments dedicated to a



particular activity depending on climate and other related factors.

Changes in geographic distribution over the past five years have been minimal, with no region increasing or declining in share by more than one percentage point. The West and Southwest regions have experienced slight growth in the past five years, whereas the Rocky Mountains, New England and Great Lakes observed small declines. These changes can be attributed to shifting demographics and varying demand levels.



# Industry Performance

## Key External Drivers continued

### Per capita disposable income

As per capita disposable income rises, more individuals can purchase gym, health and fitness club memberships. Furthermore, as disposable income increases, more consumers can afford high-cost, all-inclusive gym memberships, which benefits the industry. Per capita disposable income is expected to increase in 2016, representing a potential opportunity for the industry.

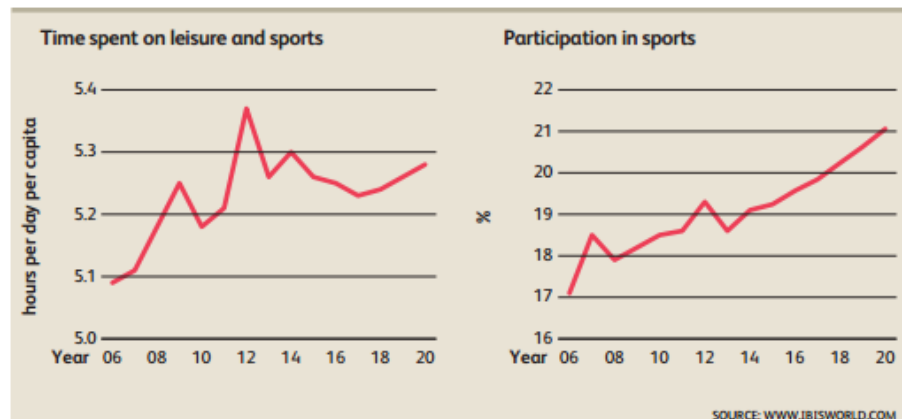
### Number of adults aged 20 to 64

Individuals aged 20 to 64 make up the largest gym-going demographic. The aging of the baby boomer generation,

coupled with the maturation of their children, will broaden the market for this industry. The number of adults aged 20 to 64 is expected to increase in 2016.

### Yield on 10-year Treasury note

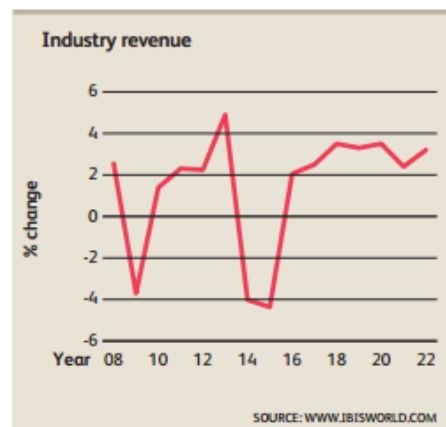
The yield on a 10-year Treasury note measures the current interest rate. As interest rates rise, the investing environment for gym, health and fitness clubs will be less favorable, discouraging gyms from expanding their franchise operations and boutique gyms from entering the industry. The yield on a 10-year Treasury note is expected to increase in 2016.



## Current Performance

Gym, health and fitness clubs have grown over the past five years, bolstered by public health initiatives that have shed light on the role of exercise in fighting diabetes, obesity and other health ailments. The number of health club memberships has grown over the period, as more individuals have valued fitness as being integral to their health. Furthermore, population growth, particularly among individuals aged 20 to 64, which composes the largest gym-going demographic, has spurred demand for health club memberships.

Over the five years to 2016, revenue is expected to grow at an annualized rate of 0.1% to \$27.1 billion, including 2.0% growth in 2016 alone, driven by rising gym membership among the increasingly active baby boomer population. Profit is expected to reach 10.4% of industry revenue in 2016, driven by the many



consumers with memberships to both chain and studio gyms. However, growing consumer demand for low-cost monthly memberships has constrained profit for gyms with low member retention rates.

## Industry landscape

Over the five years to 2016, the industry has benefited from rising consumer demand for health club memberships. According to the International Health, Racquet and Sportsclub Association (IHRSA), gym membership increased at an annualized rate of 1.7% to 54.1 million memberships from 2011 to 2014 (latest data available). Although this bolstered industry revenue, many gyms still compete on the basis of price. Gyms that have offered low-cost, contract-free memberships with fewer amenities have fared well over the period, which is in line with strong demand from budget-conscious consumers. The industry has contended with consumer time constraints over the period, with many individuals struggling to allocate time

toward fitness. Nevertheless, health-conscious individuals are still increasingly incorporating fitness into their regimen.

Demographic trends have helped shape the industry's landscape over the past five years. For example, the aging of the baby-boomer generation and the maturation of their offspring have broadened the industry's market. Moreover, government-sponsored programs, such as Michelle Obama's "Let's Move!" initiative, which aims to fight childhood obesity, have increased awareness to the benefits of physical exercise for consumers of all ages. Over the past five years, this and other health programs have provided a boon to the industry.

## Industry Outlook

Over the five years to 2021, the Gym, Health and Fitness Clubs industry will lift itself to success, benefiting from an expected revitalization in discretionary consumer spending. As consumers' disposable incomes rise, more individuals will purchase gym memberships that include a plethora of amenities, compared with low-cost memberships that fared well over the previous period. Moreover, while many individuals will be time-strapped over the period, which may constrain demand for gym memberships, growing demand for results-driven gyms that can help individuals achieve fitness goals will

continue to drive growth. For example, personal and group trainers, as well as fitness classes, will be popular.

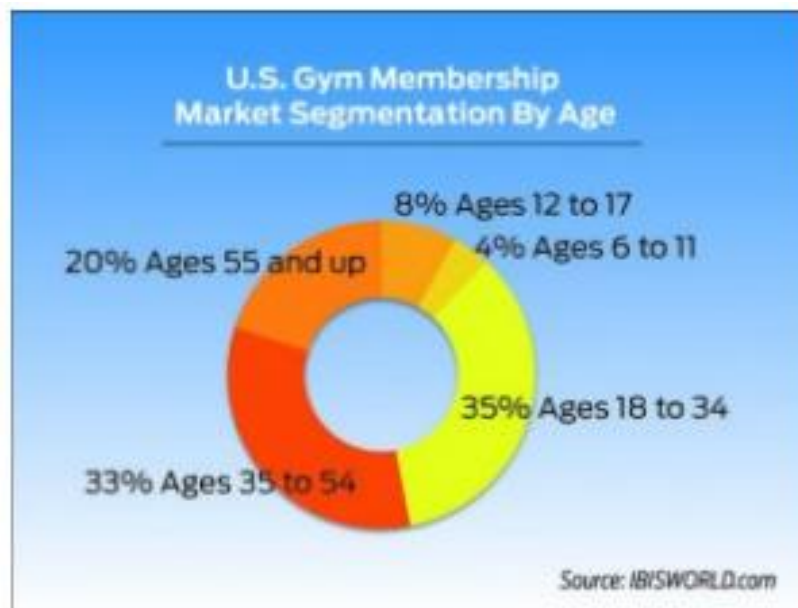
In the five years to 2021, revenue is forecast to grow at an annualized rate of 3.0% to \$31.5 billion as more consumers purchase high-cost industry services, such as cohesive, individualized health plans that include trainers and nutritional guidance. Profit is also expected to rise from 10.4% of industry revenue in 2016 to 12.4% by 2021, as many gyms offer more high-margin services, such as group personal training sessions, to strengthen their product portfolio and bolster member retention rates.

The popularity of fitness clubs has spread out over all age groups. While consumers ages 18 to 54 still make up the lion's share of gym memberships, revenue will be driven by two other demographics that are relatively new targets for the industry: the elderly and teens.

**For this reason the 18-34 and 35-54 age groups should remain primary targets. However, health club owners should also consider attracting the 55-and-up crowd with low-impact functional fitness programs and retail products related to health maintenance, including blood pressure monitoring and activity trackers.**

Up until now the fitness industry has ignored teenagers. But the generation is a viable target market for gym owners. **Not only is the demographic a revenue driver, but gym owners can also feel good about instilling a lifelong commitment into teens to exercise and eat right.** More and more cutting-edge clubs are tailoring innovative programs to those 12-17

years old including yoga, karate, kickboxing and outdoor activities as well as selling them complementary fitness-related retail products.



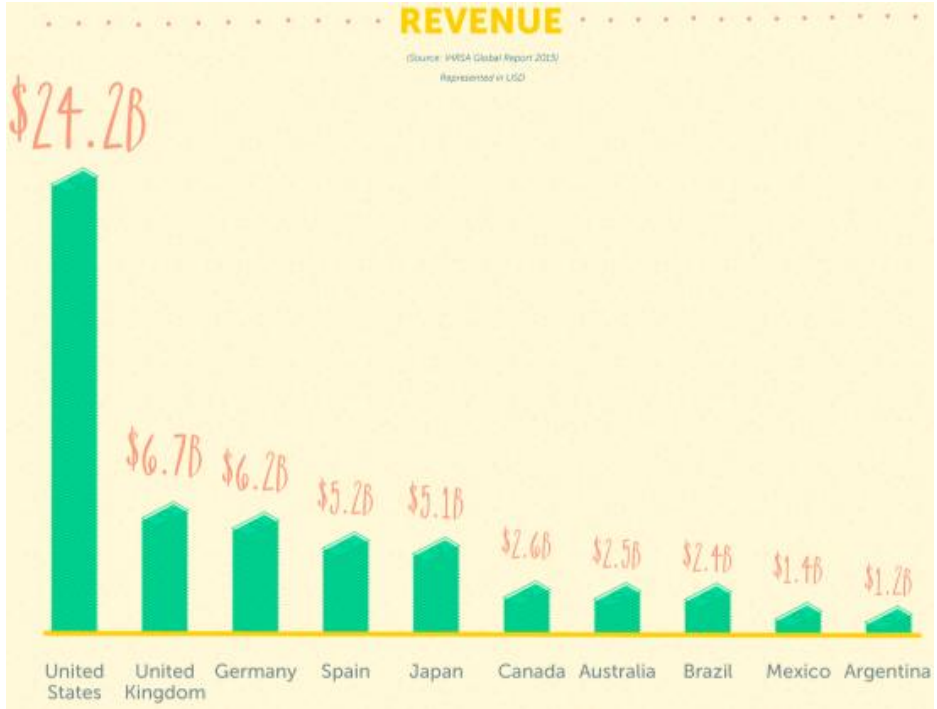
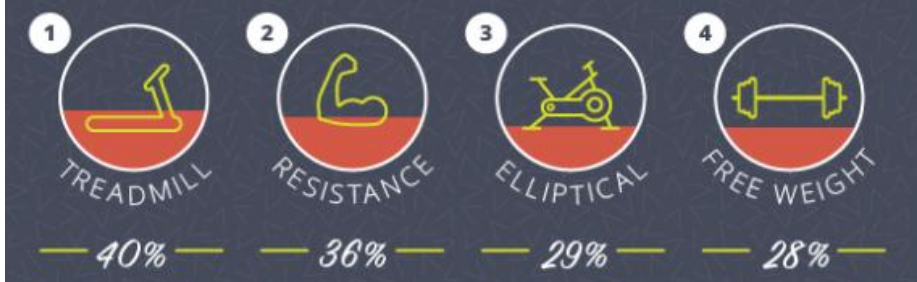
### Industry Structure

Life Cycle Stage	Growth	Regulation Level	Light
Revenue Volatility	Medium	Technology Change	Medium
Capital Intensity	Medium	Barriers to Entry	Low
Industry Assistance	Low	Industry Globalization	Low
Concentration Level	Low	Competition Level	High



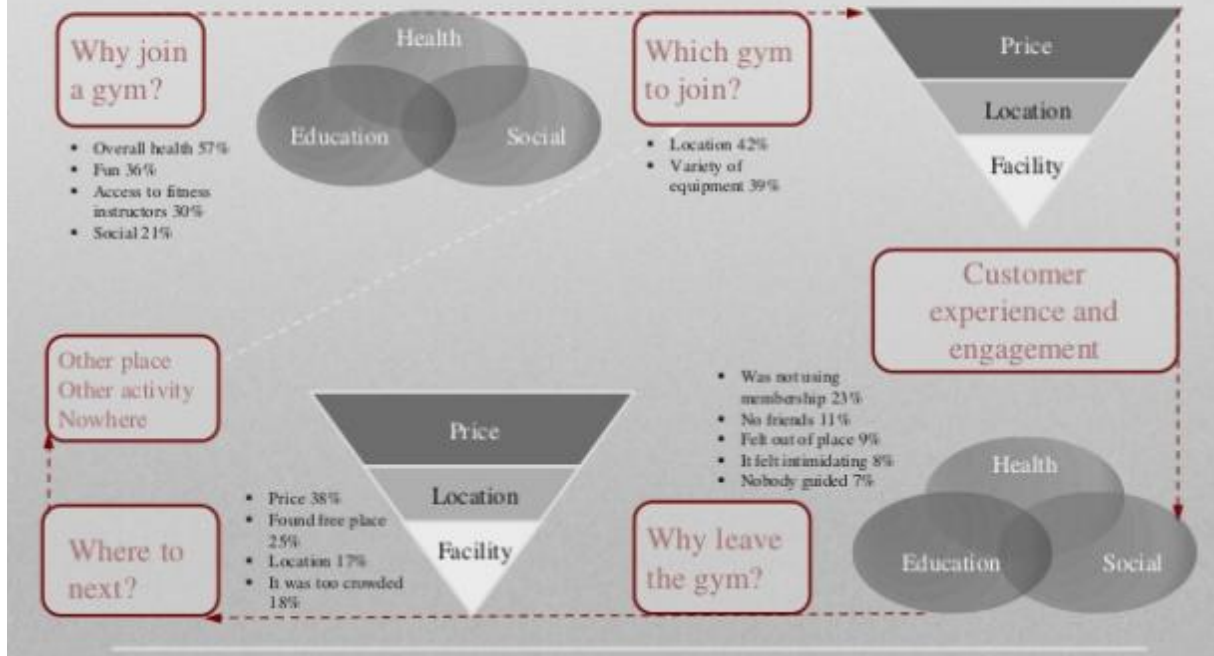
52 MILLION MEMBERS  1 in 5 AMERICANS IS A MEMBER 5 BILLION VISITS LAST YEAR

**MOST POPULAR WORKOUTS**

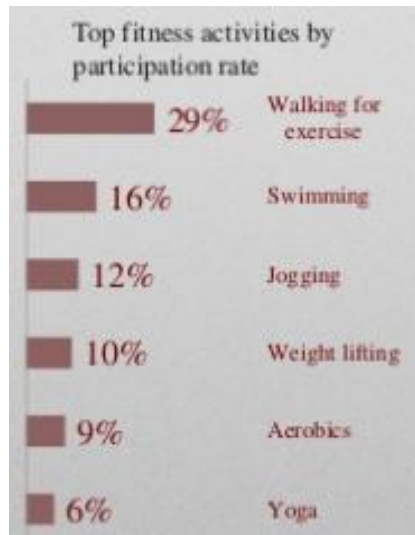


<http://blog.netpulse.com/international-fitness-showdown-infographic>

# Customers join gyms to improve health, learn about fitness, and socialize, but are price-sensitive



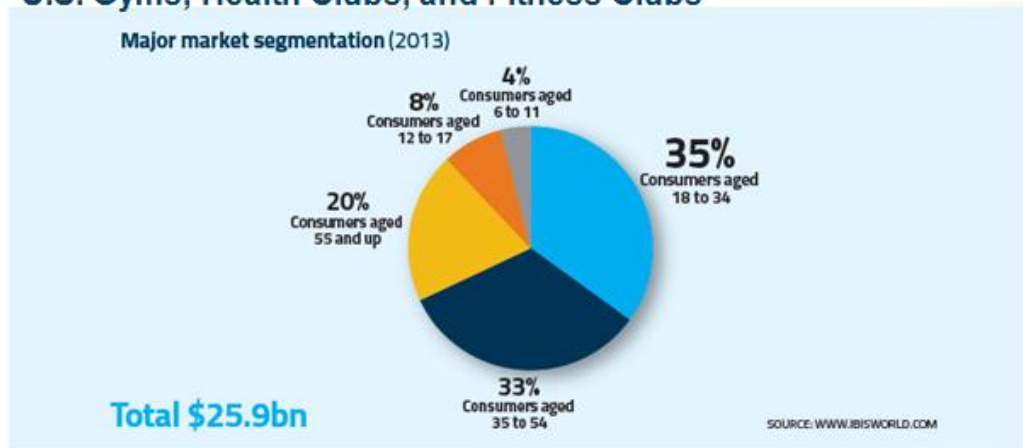
Weightlifting participation rate, 10 %



<http://www.slideshare.net/vandreeva/fitness-dot-commed-chapter-1-industry>

# MARKET SEGMENTATION

## U.S. Gyms, Health Clubs, and Fitness Clubs



KANSAS CITY, KANSAS: DISABLED POPULATION 2011		
Total population	145,312	100.0%
Population with a disability	21,466	14.8%
Under 5 years old	154	1.2%
5 to 17 years old	1,725	6.0%
18 to 64 years old	88,386	14.1%
65 years old and above	15,341	46.5%

KANSAS CITY, MISSOURI: DISABLED POPULATION 2011		
Total population	458,987	100.0%
Population with a disability	55,405	12.1%
Under 5 years old	495	1.5%
5 to 17 years old	4,830	6.4%
18 to 64 years old	32,988	10.9%
65 years old and above	17,082	35.9%

[http://www.wheelchairathletics.org/wca\\_gym](http://www.wheelchairathletics.org/wca_gym)

## The athletic apparel industry: Fitness or fashion?

Not that long ago going to the gym meant throwing on an old, sweat-stained t-shirt with a worn high school logo, a pair of frayed gym shorts and a \$30 pair of Costco running shoes that were kicked under the bed after the last run.

Working out at the gym these days has changed from a time to break a sweat to a time to impress. With new brands, styles and colors of workout clothes and gear being added every year, the branded exercise apparel industry has been bulking up, with sales pressing a staggering \$100 billion internationally and nearly \$30 billion in the U.S. alone, according to sportsbusinessdaily.com.

This is good news for big brands like Nike, Reebok and Adidas, but what does it mean for the average exercise fan who might be seeing his pocketbook get skinnier faster than his waistline?

**“People who spend a little extra money on their gym clothes generally spend a little more time in the gym,” Zimbelman said. “Even if they’re spending the money first. it’s an investment.”**

Zimbelman said the more expensive brands such as Nike, Lulu Lemon, Under Armour and Adidas have a superior quality and last longer than the cheaper brands, making them worth the price.

“It’s worth it to spend a little extra money because then you have your clothes longer and don’t have to keep replacing them,” Zimbelman said.

Carter said he usually purchases Nike shoes because of their quality and has never regretted it. His Nike shoes always seem to last longer than other athletic shoes.

“They are pretty durable compared to other shoes that I’ve had,” Carter said. “The other shoes wear out pretty quick. I trust Nike.”

Once you go Nike, Adidas, or Reebok, can you ever go back? Athletes may also find themselves continuing to buy more expensive brands because they feel a loyalty to the brand they have worn and trust.

Huish, who is on the cheerleading squad in addition to working as a personal trainer at the gym, has been sponsored by Nike and has grown to develop a love and a loyalty to the brand.

“I normally don’t shop anywhere else other than Nike,” Huish said. “There will be some things that I will buy, for example if a certain company was known for a really good pair of shoes or whatever it may be. But my loyalty’s definitely to Nike. Always.”

McBride believes that many people spend extra money on well-known brands just for the cooler looking logo. The Nike swoosh is one of the world’s most recognizable logos, next to the McDonald’s arch, making it no surprise people feel comfortable making an expensive purchase to such a well-known brand.

“People want other people to think that they’re in shape so they will wear their fitness apparel to class,” McBride said. “Even people who don’t work out will buy that type of stuff to wear to class so people will think they’re in shape.”

Jogger and basketball player Sherry Henry, 19, from Vancouver, Wash., has also noticed that buying expensive workout apparel is often about the showing off a logo and looking good at the gym.

**“Workout clothes have become a fashion statement so, therefore, you don’t wear them just to the gym,” Henry said. “Even when girls wear them to the gym they’re trying to look cute. That’s why they’re spending all that money. People wear them outside the gym and to classes because it’s fashionable. Nike is not just for performance. It’s for fashion.”**

Whether it’s motivation, quality, loyalty or fashion, athletic apparel is an exploding industry that is dominating every aspect of the game. Sales and selections are continuing to grow and companies are developing more trendy and desirable lines of apparel.

Zimbelman and other athletes find as people become more involved in fitness, the athletic apparel industry will only continue to grow.

“People are going to keep spending money on their gym clothes,” Zimbelman said. “If it’s going to change, it’s going to get bigger. It’s become more trendy. People are finally deciding to make it a part of their lifestyle and make it a priority in their lives.”

<http://universe.byu.edu/2013/07/30/the-athletic-apparel-industry-fitness-or-fashion>

In 2012, the global performance activewear market grew by more than 7.5% and exceeded US\$244 billion according to Euromonitor International. US, China, Japan and Brazil, the largest markets, collectively accounted for over half of total activewear sales in value terms during the year, while Russia, Ukraine and Argentina are poised to become star markets boasting last year's highest recorded growth rates. In the UK, the total market is forecast to grow to an estimated value of £5.34bn by 2016.

<http://brandandcommercial.com/articles/show/commercial-development/114/industry-spotlight-on-womens-activewear-part-i>



## Hats

Hat Sales Industry Statistics	
Number of baseball hats sold in the US each year	43,750,000
Annual hat sales industry revenue	\$2,153,000,000
Total number of industry employees	9,171
Total number of US hat sales and manufacturing businesses	1,373

Fitted Hat Market Share	Market Share
New Era	66 %
Adidas	15 %
Twins	6 %
Others	13 %

<http://www.statisticbrain.com/hat-industry-statistics/>

### Why Does Everyone Wear Baseball Caps?

One of the most egregious fashion trends of the past 15 to 20 years has undoubtedly been the proliferation of baseball caps – not just in the United States, but now across much of the world.

What began as a harmless and humble exercise in showing support for one’s favorite local baseball club has mushroomed into something so gargantuan and irreversible that I fear baseball caps will never vanish from the sartorial landscape.

Walk down any street in New York City or Ottumwa, Iowa – or, for that matter, even Madrid, Rome, Delhi or Tokyo – and you will see people wearing baseball caps: old folks, youngsters, teenagers, middle-aged fellows, men, women, children, even babies. And the caps may not even carry the logo of a baseball club, it might instead depict the symbol of some team in some other sport, or it may not have anything remotely connected to sports at all!

Certainly the Nike Corp. (NYSE: NKE) played a significant role in this phenomenon, capitalizing on the extraordinary popularity of Michael Jordan to produce tens of millions of

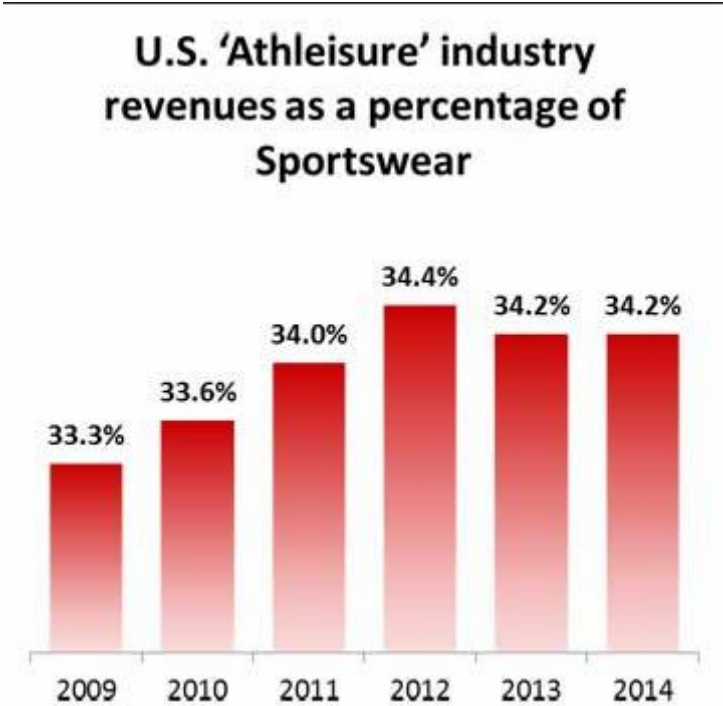
caps globally. Indeed, the Nike ‘slash’ design has become as well-known as Coca-Cola and McDonald’s arches as a global brand.

Regardless of its origins or the reasons behind them, baseball caps now are as ubiquitous as bread and water, crossing all boundaries of race, ethnicity and even class. Wealthy white WASPS in Westchester County and impoverished black and Latino homeboys in The Bronx and Brooklyn wouldn’t be caught dead without a sharp-looking Yankee cap (worn backwards or perhaps normally, depending on one’s mood).

<http://www.ibtimes.com/why-does-everyone-wear-baseball-caps-256371>

Fitness Apparel grew 13.3% to \$394 million wholesale, up \$47 million from \$347 million in 2013. Performance Apparel was also a big growth driver in 2014 as the market was up 7.8% (\$111 million) from 2013, surpassing \$1.5 billion in wholesale sales for the first time.

[https://www.sfia.org/press/706\\_Sports-and-Fitness-Industry-Surpasses-\\$84-Billion-in-Wholesale-Sales](https://www.sfia.org/press/706_Sports-and-Fitness-Industry-Surpasses-$84-Billion-in-Wholesale-Sales)



The athleisure wear market has been growing significantly in past years, thanks to increasing demand for multifunctional wardrobes that can be worn from the office to the gym. At present, the category accounts for over a third of the overall sportswear sales in the US.

Women's athleisure clothing line, in particular, is growing at a faster pace compared to the men's category, which seemed to have reached its peak and is currently posting moderate growth. February 2015 figures from NDP Group, a retail market research firm, reveal that revenue from women's activewear rose 8 percent from 2013 to 2014 in the US. Sports bras and leggings are among the categories that beat the overall industry growth rate.

<http://www.globalsources.com/gsol/I/Womens-sports/a/9000000133843.htm>

The rise in athleisure has given apparel sales a significant boost in the last couple of years. In 2014, US consumers spent \$323 billion on apparel, footwear and accessories, according to The NPD Group. This was a \$2 billion increase from the prior year, and largely thanks to dramatic growth in sales of activewear. Morgan Stanley predicts that, by 2020, activewear will represent \$83 billion in sales, “stealing market share from non-athletic apparel.”

According to Stylus, “The athleisure phenomenon looks set to continue into 2016 and beyond, and is now on course to become one of the fastest-growing global apparel product categories in the second half of this decade.”

This growth in market size is understandable when you look at the growth in new products and the average prices of athleisurewear. For instance, there are currently three times as many sneakers on the market as there are skinny jeans. Sneakers are also expanding into the luxury market, accounting for 25% of new arrivals in 2015, compared to 15% the year prior. According to The NPD Group, the athletic footwear industry grew by 8% in the US last year, generating \$17.2 billion. Unit sales increased by 3% and the average selling price was up 5%, to \$61.15. And yoga pants, the bread and butter of athleisure, have experienced even more dramatic growth. New arrivals grew 341% in a three-month period in 2015, compared to the same period in 2014. Meanwhile, according to EDITED, the average price for yoga pants increased by 14% as luxury brands such as [Lucas Hugh](#) entered the market.

<http://www.forbes.com/sites/deborahweinswig/2016/03/11/how-athleisure-is-lighting-up-lackluster-clothing-sales/#272299bf5684>



<http://www.visualistan.com/2014/06/where-do-you-fit-in-latest-in-workout-world.html>



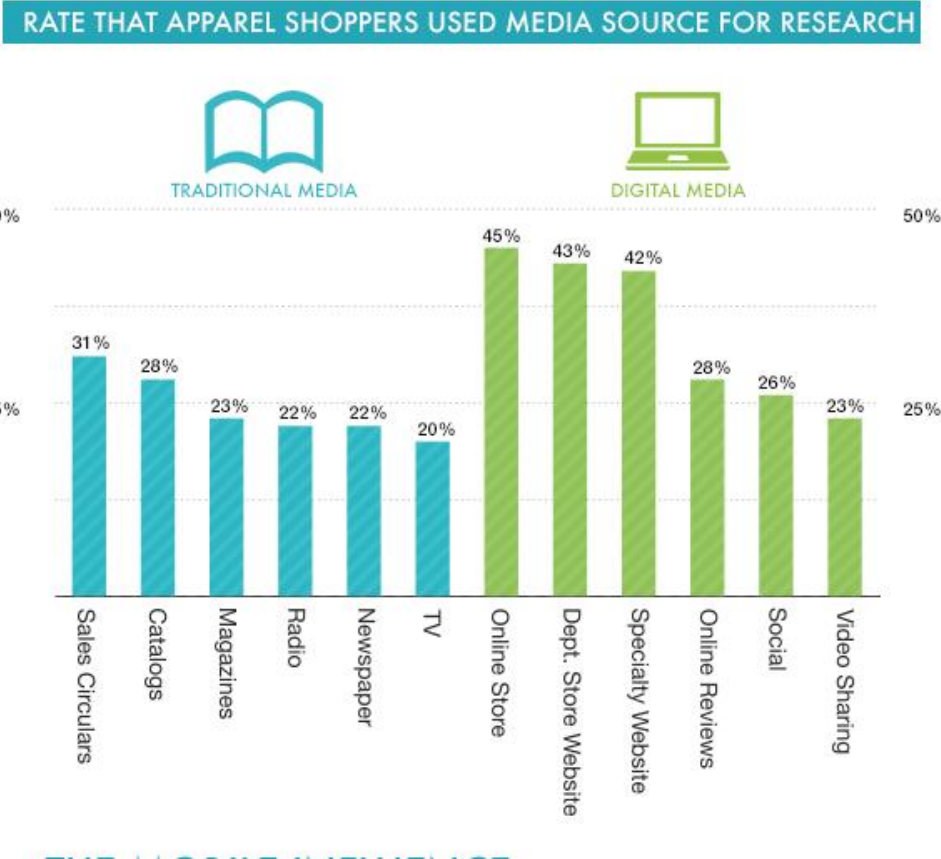
<http://visual.ly/precor-why-new-fitness-amenity-hospitality-gold>

## Where and How are Fitness Consumers Shopping?

95% of all fitness clothing sales are made in-store, while only 56% of consumers have made these purchases online. Research indicates that women still prefer to shop for clothing in brick-and-mortar stores because they prefer the tactile experience of touching the clothing and trying on apparel in-store. However, as women find consistency in fit with their favorite

brands, online fitness clothing purchases will most likely increase as well. **The classic t-shirt is still the most commonly purchased athletic clothing item, and the consumer threshold on items such as the t-shirt, tank top, or shorts is less than \$30. These items are bought more frequently than specialized apparel, and almost always in-store, but the second most purchased item in this segment is fitness pants.**

<http://www.womensmarketing.com/blog/2015/05/athleisure-is-winning-the-lifestyle-marketing-game/>

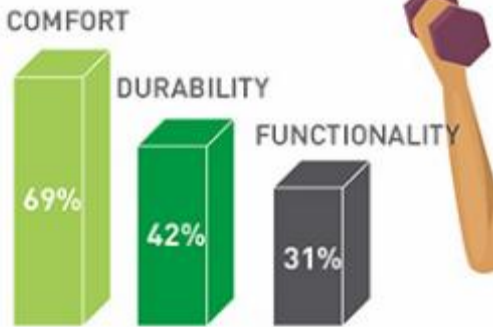


In 2014, active wear sales equaled \$33.7 billion, representing 16% of the \$206.3 billion in apparel sales. And it seems that it’s not only fitness enthusiasts that are hyping this trend, 38% of consumers surveyed said they purchased workout gear as casual daywear.

Research indicates that young adults aged 18-34 and affluent consumers are most likely to buy fitness apparel.

<http://www.womensmarketing.com/blog/2015/05/athleisure-is-winning-the-lifestyle-marketing-game/>

### Most important attributes of athletic wear



### Top 5 commonly purchased fitness apparel items:



- T-Shirt
- Pants (casual, yoga)
- Fitness shorts
- Performance t-shirt
- Tank top

### It's not just for the gym! Women report wearing athletic apparel



### 95% of all fitness apparel purchases are made in-store

Survey respondents reported buying fitness apparel in:

Mass merchandisers	58%
Department stores	50%
Sporting goods stores	40%
Specialty fitness clothing stores	31%

<http://www.womensmarketing.com/blog/2015/05/athleisure-trend-infographic/>

## Answers from forums

*Hello fellow brothers and sisters in Iron!*

*I'm looking to start my own fitness/bodybuilding clothing line. While there is a whole host of them out there, some obvious and others not. I'm just wondering what do you guys prefer/think of the industry.*

*What is it you wear to the gym?*

*What would make you purchase gym clothing (price, design, materials etc)?*

*Where do you currently get your stuff from now?*

## **Answers:**

*-I prefer to get clothes that have as few logos or designs on them as possible. The majority of my clothing is plain each piece consisting of a single solid colour without any images or text to be seen anywhere other than the tag. Its usually cheaper which is definitely a plus but plain clothing just appeals more to me than having some random string of letters and/or numbers next to random graphics of a beach or some references to american cities Ive never been to.*

*-This is what I wear most of the time, gym or not. Plain cotton t-shirts, sometimes simple band shirts (with graphic designs rather than just album covers or tour dates).*

*I only recently bought clothes specifically for the gym, just a couple of plain t-shirts. Might have a logo somewhere on them but I don't even know what brand they are, I filtered by price and got the cheapest.*

*-Plain shirts here as well purchased just for the gym. Idk why someone would want to sweat in a nice shirt and get it all fu\*ked up.*

*-In the gym I just wear simple tanks or t-shirts, shorts or sweat pants. I just find stuff that fits nice or is comfortable and go with that. If something has a logo, its small on the bottom corner of a pair of shorts or something. I don't mind the loud, ridiculous graphics, but I'm also not gonna pay more for it. If it's a free shirt from a supplement company than that's a different story.*

*-i'm right there with you on the comfortable, not too flashy clothes. my favorite shirts are my plain solid color sonoma "weekend tees" i got at kohls for like \$5 each.*

*-I like to wear plain v necks to the gym. I always get hate for it, but it feels so good to not get caught on your shirt during a movement.*

*-I wear a hoodie, sweatpants (or shorts), and tennis shoes - usually vans or something.*

*I love Flag Nor Fail, Gym Shark, Gorilla Wear, etc - but I'm not paying fucking \$50 for a t-shirt.*

*-I'm the same, whatever is relatively clean I'll wear to the gym*

*-i really like gymsharks stuff, i dont have any of it but it looks dope*

*-I haven't bought any gym clothes in 4 years, I just wear what I got in college football because its nice and its lasted. If I did go buy some, I'd want it just like what I have now. It's top end Nike. I really like the tight fitted tops with mid length shorts made out of the stretchy material (if that makes sense). I'm more than willing to pay top dollar for some gym clothes, but only if they're going to last like what I have now. Something that would be nice is if there was a tight fitting pocket for a phone or iPod on the side near the waist, so you aren't having it flop around in your loose pockets or hitting it with dumbbells. Also, I love the football girdles I have, so something tight fitting like that is nice.*

[https://www.reddit.com/r/bodybuilding/comments/2kk8mj/gym\\_clothing\\_brands\\_and\\_the\\_industry](https://www.reddit.com/r/bodybuilding/comments/2kk8mj/gym_clothing_brands_and_the_industry)

## Comfort Matters

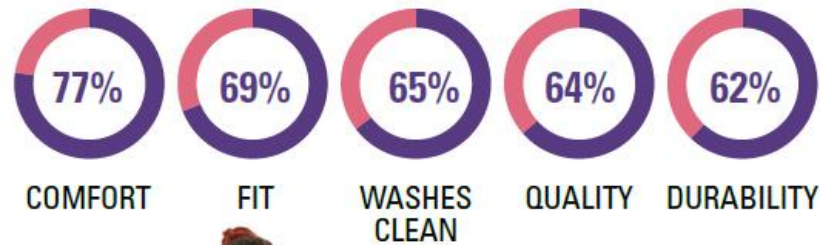
Regardless of demographics, exercise frequency/intensity, or sports activity, comfort (42%) is the top factor consumers like most about their favorite activewear item, followed by fit (16%), breathability (15%), and style (14%). In fact, 73% of consumers who have adopted the athleisure trend of wearing active apparel for purposes other than exercise say comfort is the reason. More consumers describe cotton activewear as the most comfortable (53%), when compared with active clothing made from synthetics like polyester (10%) and nylon (11%). Consumers report that the top reason they avoid polyester activewear is that it is uncomfortable.

Attracting customers and earning their loyalty in the rapidly diversifying activewear market may require that retailers and brands seize opportunities to **improve product performance**. The majority of consumers (52%) say they are more likely to shop at a store offering athletic apparel that can be worn all day long. The ability of athletic apparel to integrate into a consumer's daily routine depends on comfort and a variety of performance factors. More than 6 in 10 consumers say they are very or somewhat likely to look for odor resistant, moisture management, stretch, and thermal regulation features in their athletic apparel. Shoppers may recognize that these features can help improve the comfort and fit of their active clothing.



## TOP PURCHASE DRIVERS FOR ACTIVEWEAR

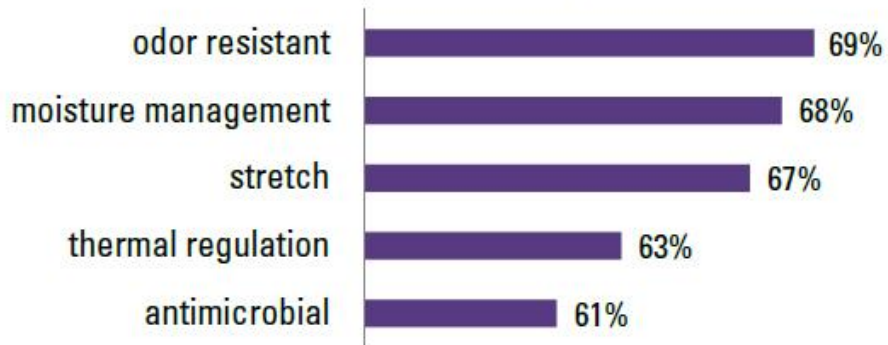
% who say the following factors are very important in their decision to purchase athletic apparel:



More than 6 in 10 shoppers say that washing clean is very important in their decision to purchase athletic apparel. Among those who experience odor issues in activewear, lingering odors have caused 8 in 10 consumers to re-wash their activewear using the same or different methods. Rewashing garments costs customers time and money, can accelerate the degradation of performance technologies on clothing, and negatively impacts the environment. Cotton t-shirts have a demonstrated odor resistance advantage over polyester. A recent study revealed that washed polyester t-shirts had more than three times the amount of acids that contribute to underarm odor than cotton tees<sup>3</sup>. Retailers and brands offering cotton performance activewear can meet customer needs for everyday athletic apparel that does not hold odor, washes clean, and delivers on comfort and style.

## PERFORMANCE FEATURES IN ACTIVEWEAR

% of shoppers likely to seek out the following features:



### CUSTOMER REVIEW OF MEN'S ATHLETIC SHIRT

Fiber Content: 100% Polyester

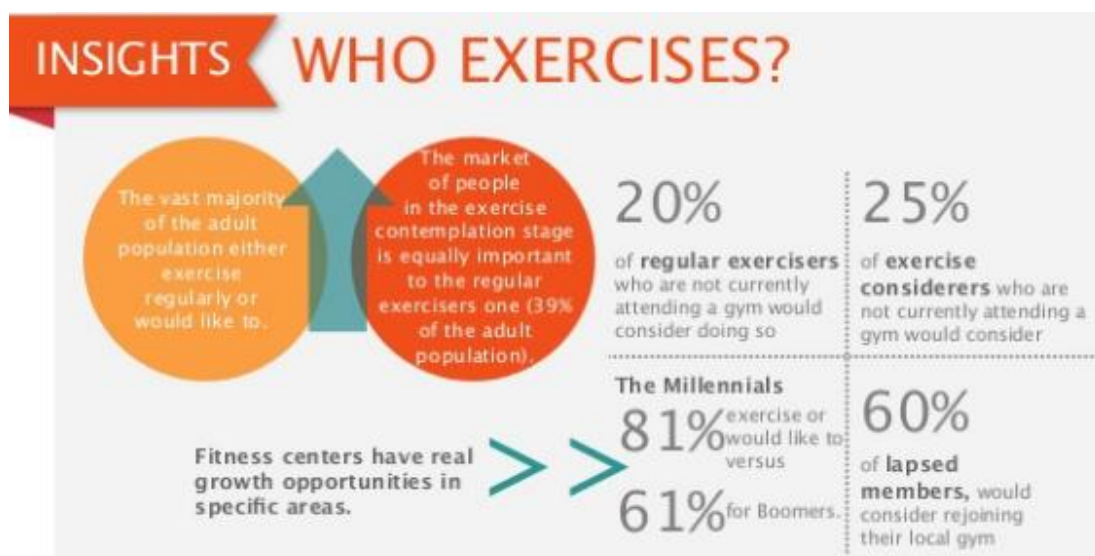
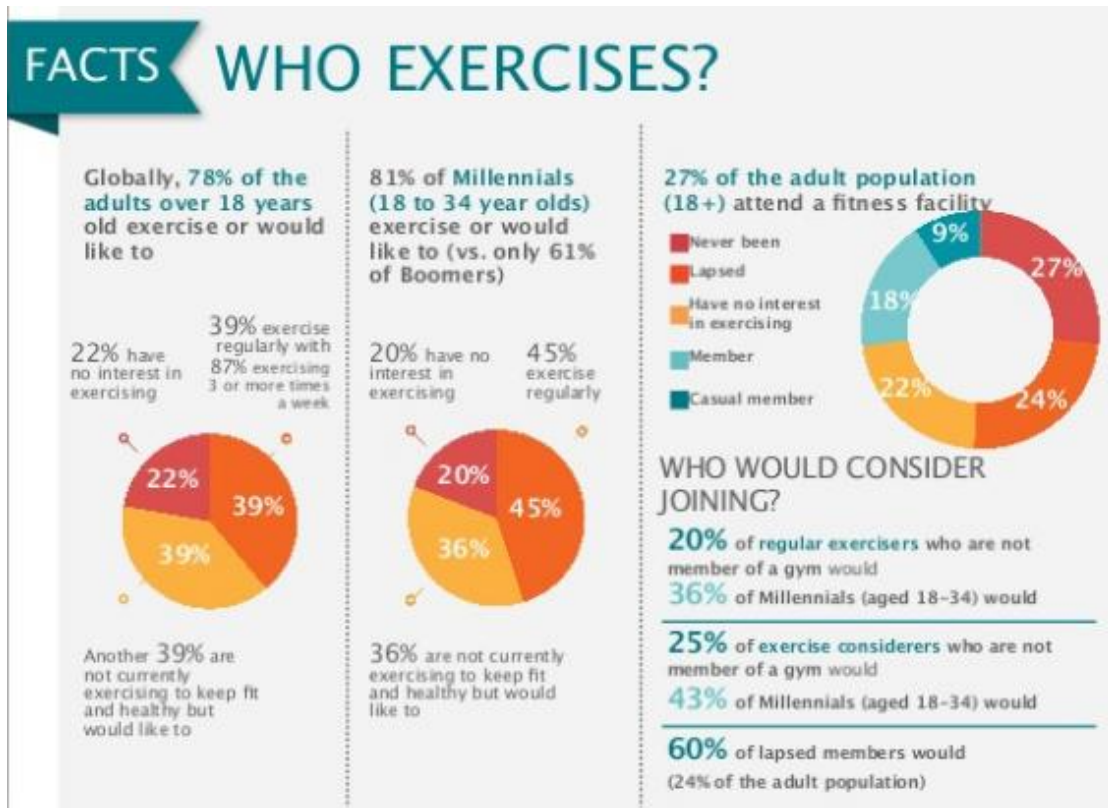
"...even just wearing these [specific active shirt] around the house, they immediately begin to smell....I cannot believe [brand] let this pass through their QC (quality control) department and into the hands of consumers." ~*Specialty Store Customer*

<http://www.cottoninc.com/corporate/Market-Data/SupplyChainInsights/Winning-In-The-US-Activewear-Market/>

# CONSUMERS

"The average member is in his 40s, married," Cuts Managing Director Steven Haase told Fox News. "He's not looking to pick up a chick--those days of the '80s aren't going to happen. He has a couple kids and he's trying to squeeze in 30 minutes to lose that 10-20 lbs. he gained in the last few years."

<http://smallbusiness.chron.com/target-market-fitness-gyms-3354.html>



<http://www.slideshare.net/Bryankorourke/nielsen-global-consumer-exercise-trends-survey-2014>

# FACTS WHAT ARE THE EXERCISERS DOING?

**FITNESS IS THE WORLD'S BIGGEST 'SPORT'**

**61% of regular exercisers are currently doing gym-type**

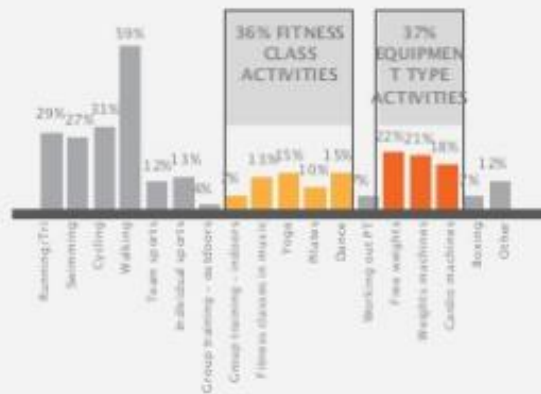


76% of regular exercisers are aged 18 to 34 years old

69% of exercisers that aren't doing gym-type activities would consider.

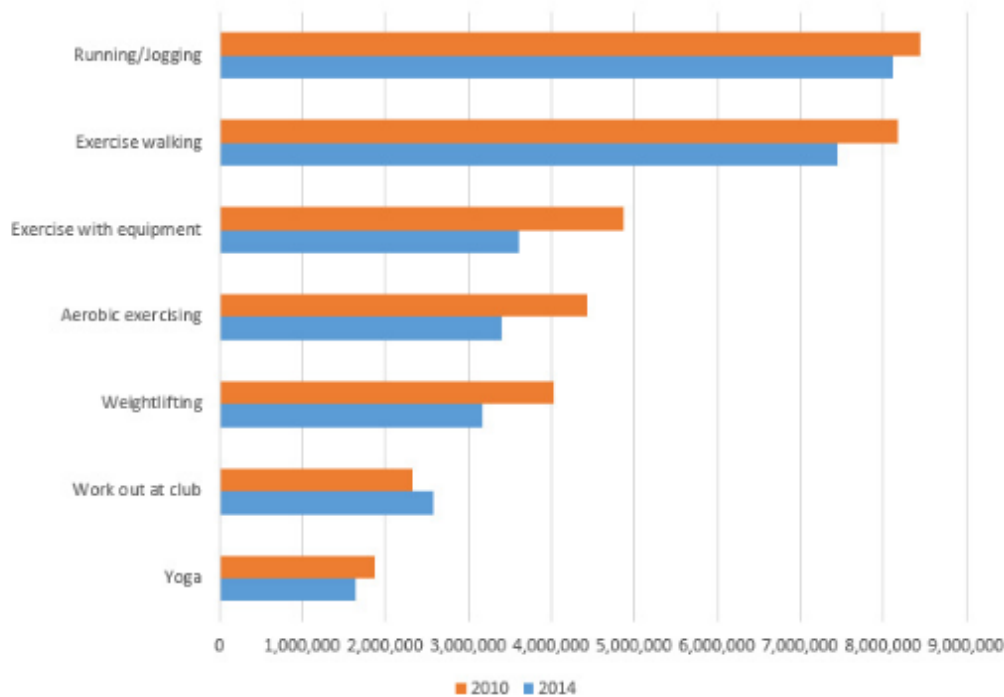
**36% of regular exercisers do fitness class type of activities.**

**37% of regular exercisers are currently doing equipment-type activities.**



High frequency exercisers using equipment type activities are also likely to attend between 3-5 group fitness classes per week.

Chart 3: Youth (Ages 7-17) Participation in Exercise/Fitness Activities, 2014 vs. 2010 (No. of Participants)

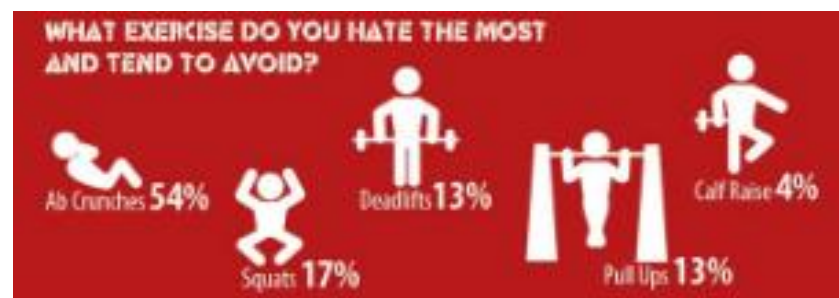
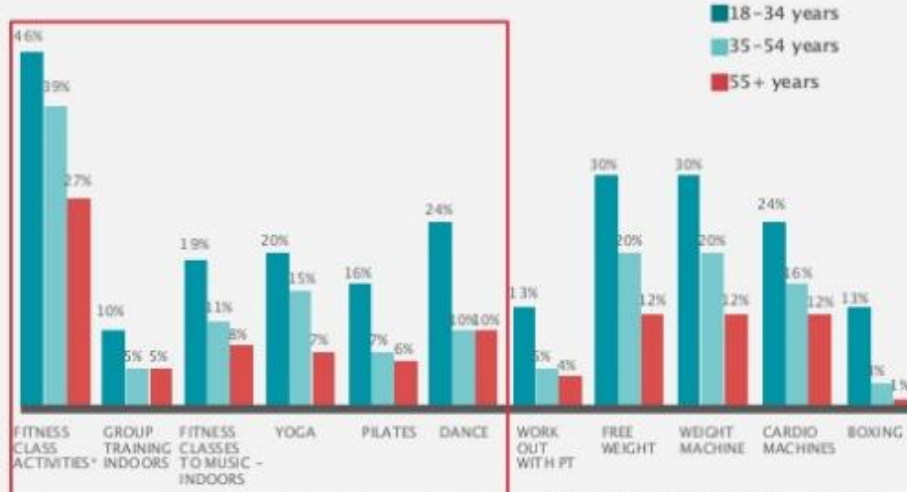


<http://sbrnet.com/Blog/July-2015/Youth-Sports-Participation-Declines-Significantly.aspx>

## FACTS

# WHAT ARE THE EXERCISERS DOING?

MILLENNIALS DOMINATE ALL FITNESS CLASS ACTIVITIES.



## INSIGHTS

# WHAT ARE THE EXERCISERS DOING?

SHIFTING FOCUS TOWARD MILLENNIALS.

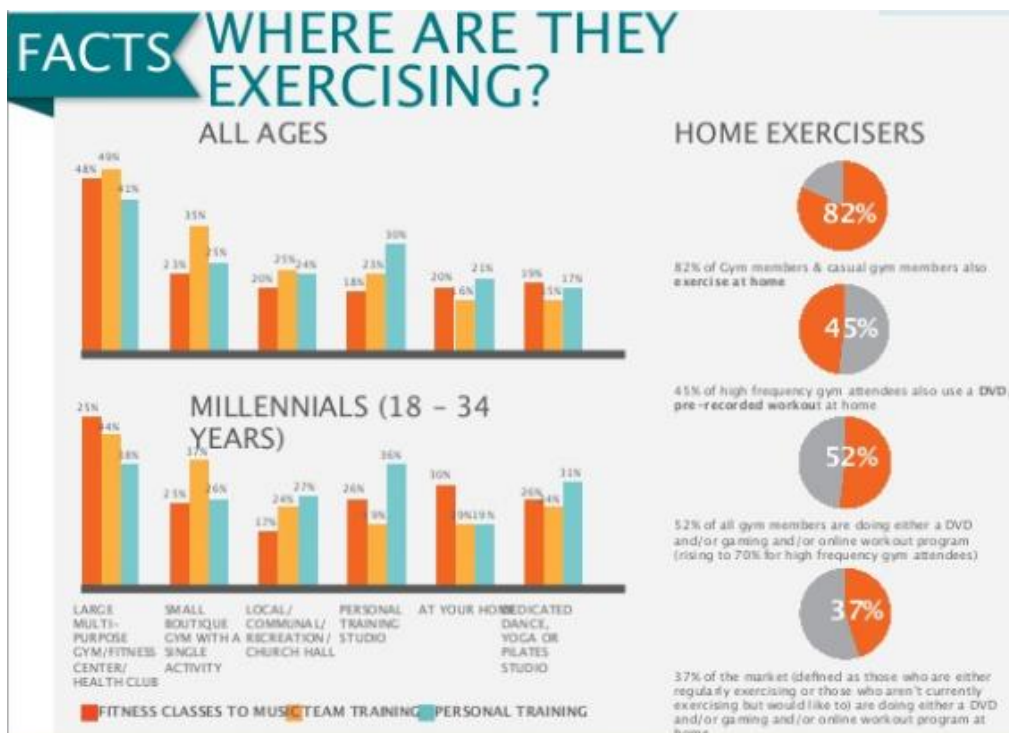
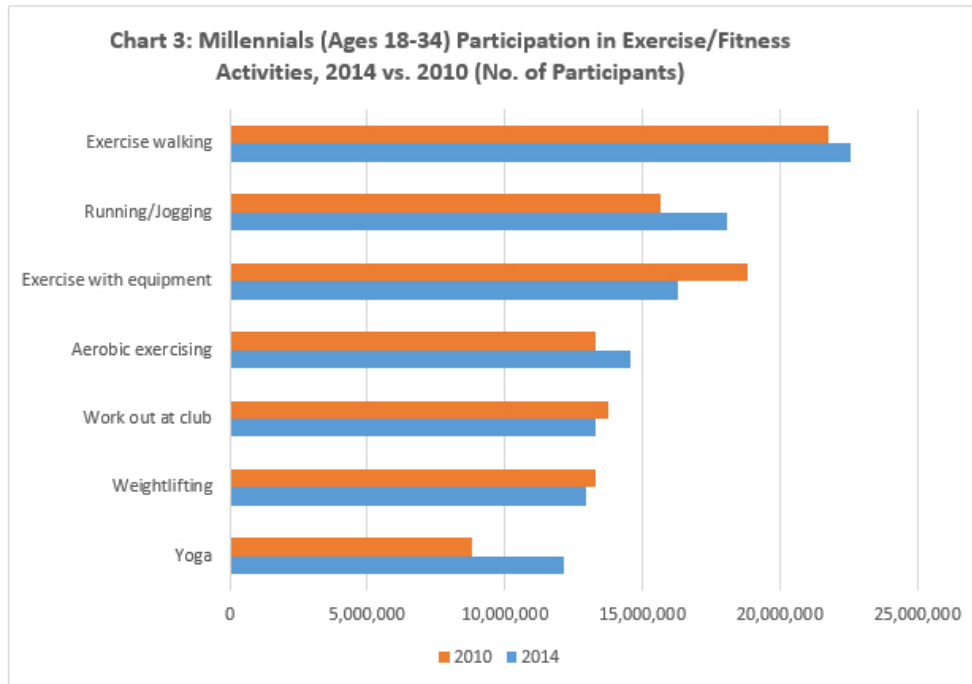
48% of exercisers do gym-type activities – **Half the target market.**

The huge majority Millennials who regularly exercise are doing gym-type activities



## Exercise/Fitness:

As shown in Chart 3 below, participation by millennials in exercise walking, running/jogging, aerobic exercising and yoga increased between 2010 and 2014. **However, participation declined for exercising with equipment, weightlifting and working out at a club between 2010 and 2014.**



# USER FACTS WHY ARE THEY EXERCISING?

MAIN DRIVERS THAT PEOPLE EXERCISE:

ALL AGES  
MILLENNIALS

GET HEALTHY / MAINTAIN HEALTH GET IN / MAINTAIN SHAPE (LOSE WEIGHT, TONE-UP ETC.)



THE IDEAL FITNESS EXPERIENCE IS:

FUN

CALM / RELAXING

CONVENIENT

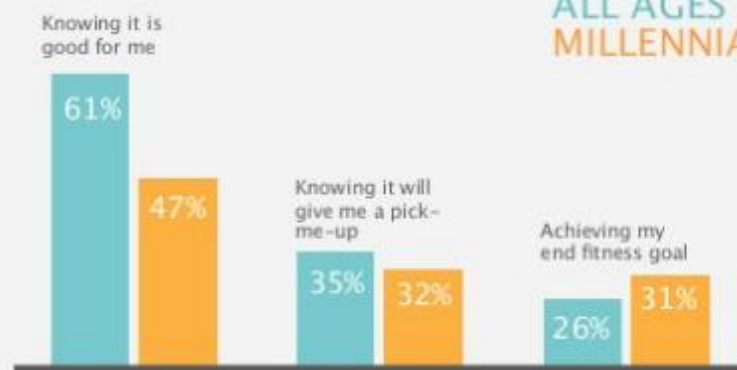
CHALLENGING



# USER FACTS WHY ARE THEY EXERCISING?

WHEN THE GOING GETS TOUGH, THE REASON PEOPLE EXERCISE IS:

ALL AGES  
MILLENNIALS

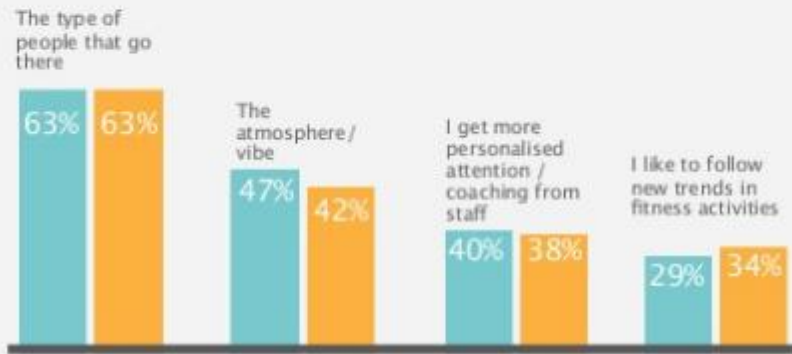


<http://www.slideshare.net/Bryankorourke/nielsen-global-consumer-exercise-trends-survey-2014>

FACTS

# WHY ARE THEY GOING TO BOUTIQUE GYM'S / FACILITIES?

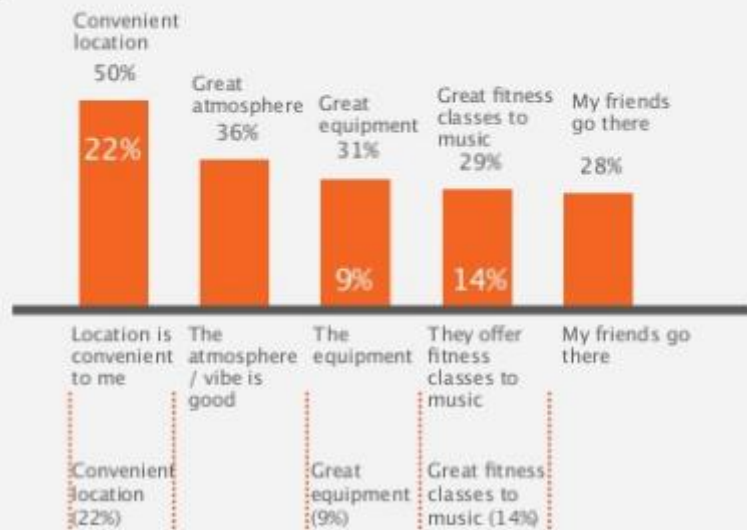
ALL AGES  
MILLENNIALS



USER FACTS

# WHAT DRIVES PEOPLE INTO FITNESS FACILITIES?

TOP DRIVERS WHY PEOPLE ATTEND THEIR CURRENT FITNESS FACILITY ARE:



WHEN ASKED THE MAIN REASON

<http://www.slideshare.net/Bryankorourke/nielsen-global-consumer-exercise-trends-survey-2014>



# Weight Watcher

## Behavioural

- Convenience
- Improved fitness
- Frequent visits - medium usage
- Brand loyal

## Psychographic

- Health conscious
- Hectic lifestyle
- Environmental concerned
- Extravert
- Medium level of media consumption
- Outdoor advertising, Newspapers, Magazines
- Online

## Profile

- Female
- 30-45 years old
- Mothers
- Office Job
- £20,000-£30,000
- Full nest
- C1-B
- Comfortably off (Secure family)
- Sub-urban Mindsets - F
- Control/Mainstream

# Muscle Maintenance

## Behavioural

- Convenience
- Vanity
- Very Frequent (Heavy usage)
- Switcher - depending on services

## Psychographic

- Health conscious
- Extravert
- A follower of trends
- High level of media consumption
- Sky Sports
- Mens Health
- Social Media

## Profile

- 18-25 years old
- Male
- Students likely to study sports
- Occupation - skilled trade
- £15,000-£20,000
- Young/Single
- E-C1
- Moderate means (blue collar roots)
- New home makers - H
- Aspirer

# Health Maintenance

## Behavioural

- Convenience
- Close proximity
- Frequent (weekly)
- Brand loyal
- Medium

## Psychographic

- Health conscious
- Routines
- Independent
- Introvert
- High/unconscious level of media consumption
- Hypodermic syringe model

## Profile

- 60-75 years old
- Female
- Retired
- Empty nest
- E
- Comfortably Off (Prudent pensioners)
- Elderly needs - L
- Mainstream

# Sporting Members

## Behavioural

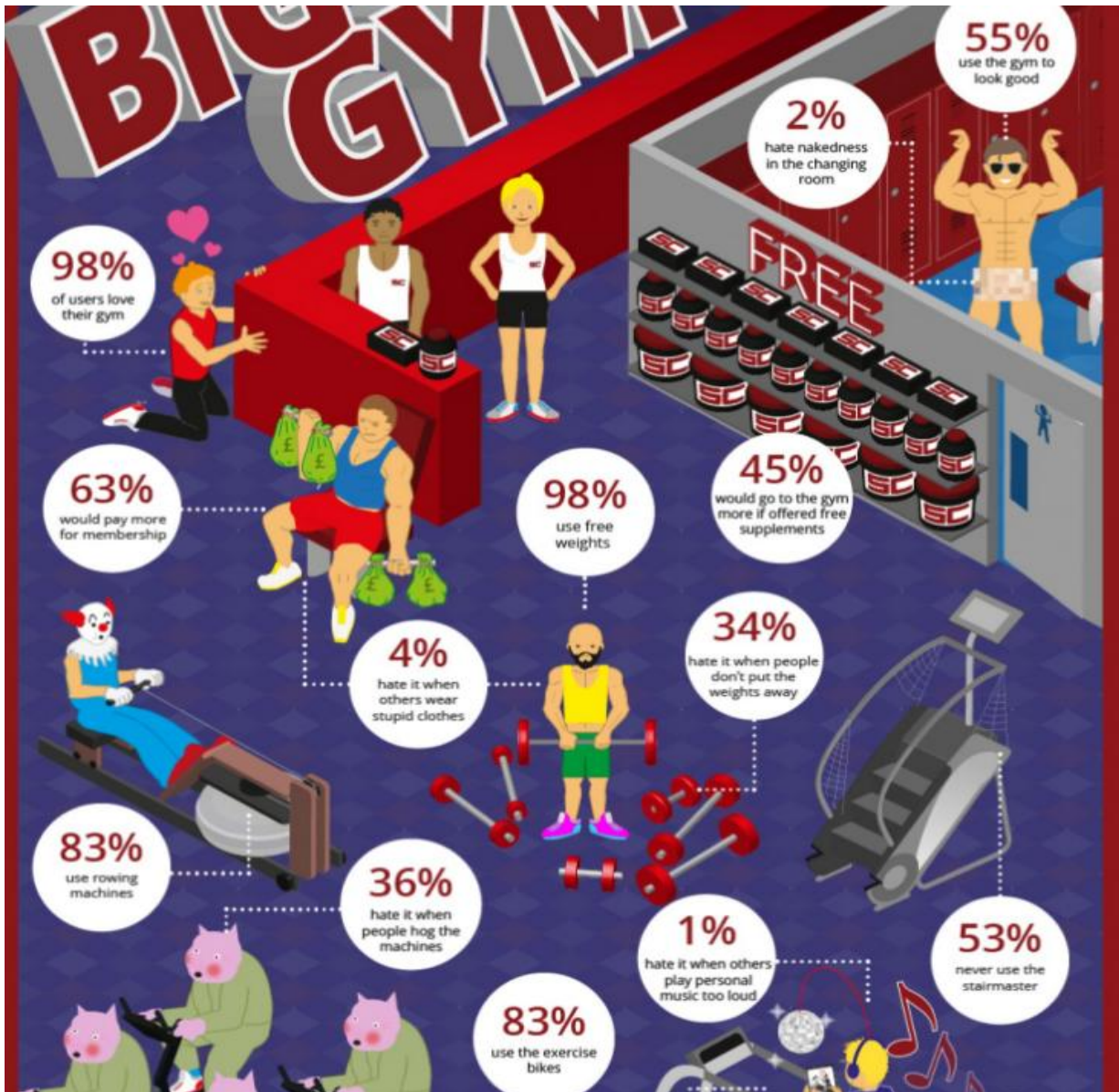
- Convenience
- Frequent
- Switchers - depends on facilities
- Heavy usage

## Psychographic

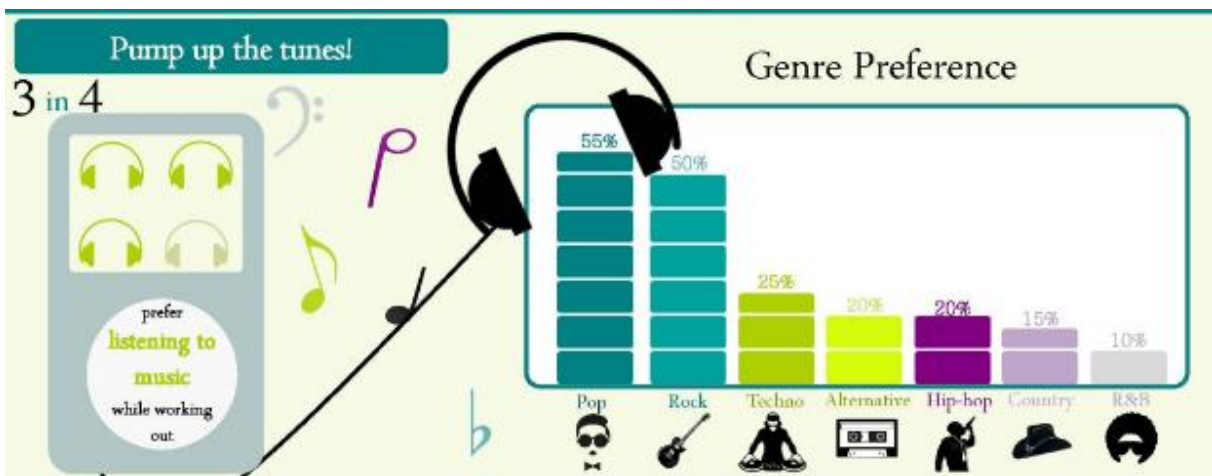
- Health conscious
- Interest in sports
- Extravert
- Independent
- Very High level of media consumption

## Profile

- Male
- 30-45 years old
- £30,000+
- Managerial position
- Full nest
- C1-B
- Sub-urban mindsets - F
- Control/Mainstream

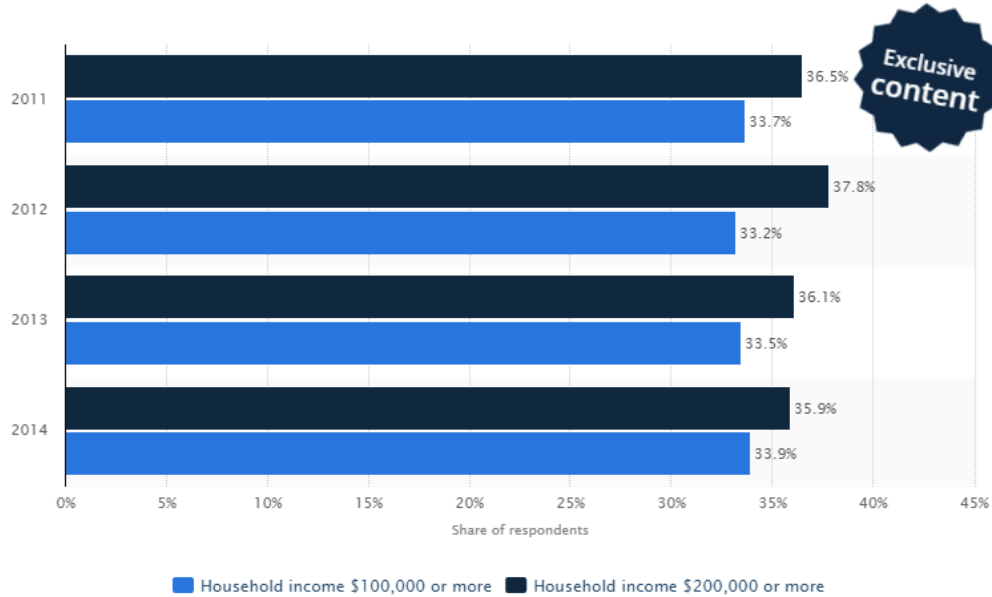


<http://visual.ly/supplement-centre-big-gym-survey-2014>



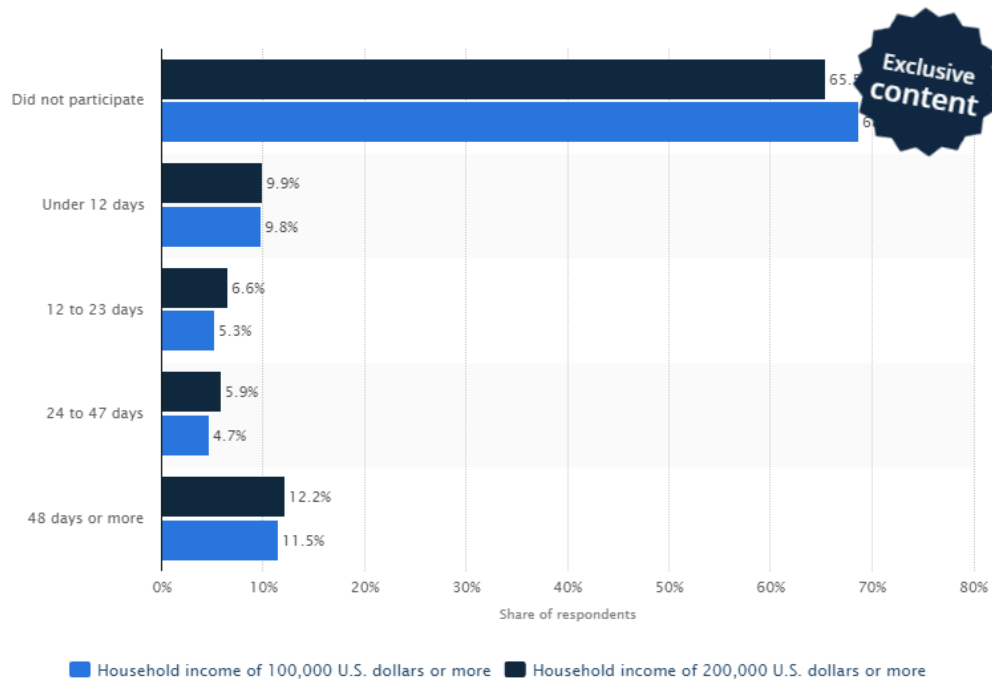
## Share of affluent household members in the United States who did weightlifting or bodybuilding in 2011 to 2014

This statistic shows the percentage of affluent household members in the United States who do weightlifting or bodybuilding from 2011 to 2014. In 2013, 36.1 percent of respondents who came from a household where the annual income was 200,000 U.S. dollars or more stated that they do weightlifting or bodybuilding.



## Affluent households: number of days household members participated in weightlifting/bodybuilding in the United States in 2015

The statistic shows the number of days members of affluent households participated in weightlifting/bodybuilding in the United States in 2015. Members of 68.8 percent of households with a household income of 100,000 U.S. dollars or more did not participate in weightlifting/bodybuilding at all in 2015.



<http://www.statista.com/statistics/242500/affluent-households-participation-in-weightlifting-bodybuilding-in-the-us/>

## **7 interesting facts about the U.S. gym industry**

### **1. There are twice as many gyms in the U.S. as McDonald's locations**

Score one for health. In 2012, there were 30,500 health clubs in the U.S., compared with 14,000 McDonald's restaurants. U.S. growth of McDonald's and other fast-food locations has slowed significantly in recent years, while the number of gyms is up over 10 percent since 2005.

### **2. 50 million gym members is a lot, but there's a ton of growth potential**

Over 50 million Americans are members of gyms, with nearly 20 percent growth from 2005 to 2012. Despite this large number, this leaves almost 200 million adults without a membership. It turns out many people go through gym cycles, with about 30 percent of members cancelling their health club membership each year. Higher retention, a shift of some of the eight million non-member patrons from visitors to full-fledged members, and capture of a portion of the 75 percent of adults who are not members, all would increase membership significantly.

### **3. Group fitness classes and trainers drive membership growth**

22 percent of gym members report that they renew their membership in order to attend group exercise classes. 19 percent say that retaining access to fitness professionals is a key reason for staying at their health clubs.

### **4. High intensity and body-weight training continue to fuel gym activity**

Group fitness classes and personal training sessions are key for many gym-goers. What type of classes are hot now? One big category is High-Intensity Interval Training (HIIT) workouts, which are multiple sets of alternating short bursts of all-out effort – whether it's running or weight-lifting – followed by brief rest periods. Jillian Michaels, personal trainer and host of weight-loss TV show "The Biggest Loser," says, "Based on current research that suggests high-intensity interval training is the best way to achieve training improvements and body change results, metabolic training will continue to top the list of trends." Body-weight training – versus weights and machines – is also a popular form of exercise. It is expected to continue to be a staple of classes in the years to come. HIIT and body-weight workouts are popular in large part because they allow for short, efficient, and convenient ways to stay in shape.

## **5. Most members do not attend**

Sadly, but not tremendously surprisingly, 80 percent of Americans who have a gym membership do not use the gym. Health club utilization is very low and the cause is often disingenuous, post-holiday signup. The typical person who signs up for a membership in January, following the indulgent holiday season, stops going to the gym just 24 weeks after signing up.

## **6. ... And many who do attend go for non-fitness reasons**

Apparently, the gym is not just a place to go to exercise; it's also a social destination. A recent study found that 50 percent go to the gym to either "check out the opposite sex or meet with friends." In fact, one third of the 2,000 participants in the study report never working up a sweat while at the gym. Next time you're in the gym, find these social butterflies and encourage them to work out!

## **7. The gym is used to cover up other activities**

Perhaps even worse than attending the gym and not exercising is lying about going to the gym. 13 percent of Americans admit they have told others they were at the gym, while they were actually somewhere else. Where did they really go? My guess is we don't really want to know.

<http://www.flytefitness.com/blog/post/7-interesting-facts-about-the-us-gym-industry>

## Powerlifting

Table 1. Demographic characteristics of the powerlifters.

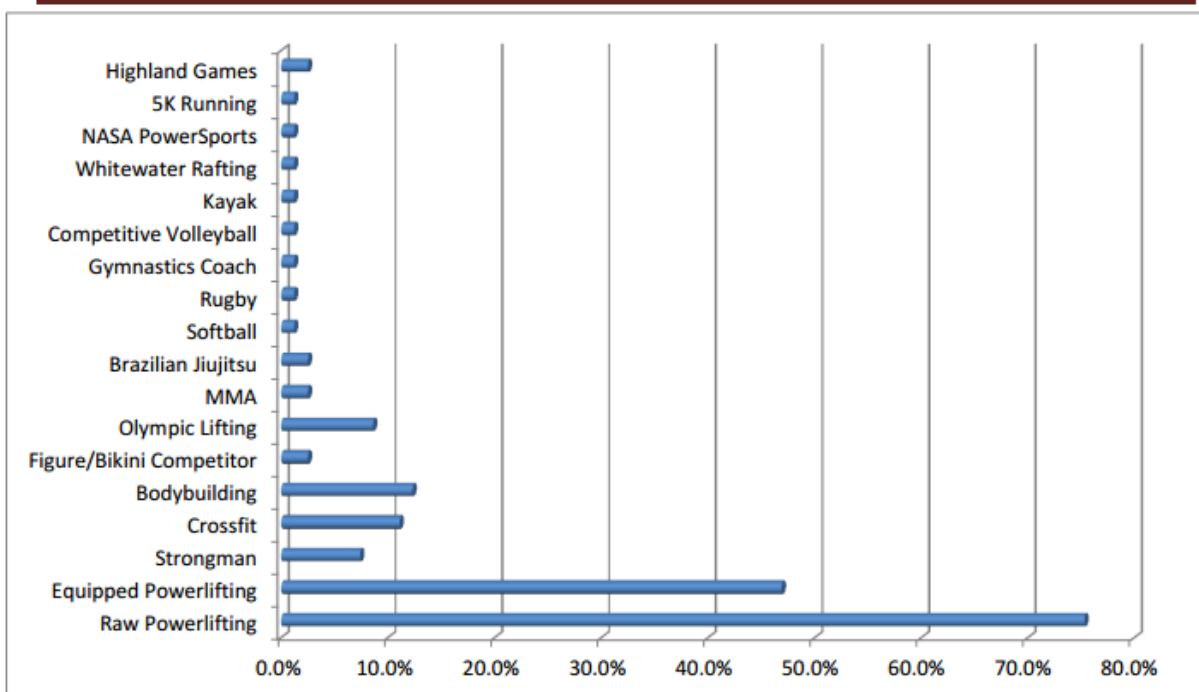
	Age		Body Weight Class		Competitive Standard		Gender		
	All Lifters (n = 101)	Open (n = 59)	Masters (n = 42)	Lightweight (n = 59)	Heavyweight (n = 42)	National (n = 36)	International (n = 65)	Male (n = 82)	Female (n = 19)
Age (years)	36.6 ± 12.4	28.4 ± 6.6	49.6 ± 6.9*	36.6 ± 13.4	36.5 ± 11.0	32.8 ± 11.5	38.6 ± 12.4*	35.8 ± 12.3	40.2 ± 12.3
Weight training Experience (years)	9.9 ± 7.4	7.9 ± 5.7	13.5 ± 8.9*	9.6 ± 7.9	10.3 ± 6.8	8.3 ± 7.2	10.7 ± 7.5	10.8 ± 7.7	5.8 ± 3.8*
Powerlifting Experience (years)	5.4 ± 4.8	3.8 ± 3.7	8.5 ± 5.1*	4.9 ± 5.0	6.1 ± 4.4	3.7 ± 4.5	6.3 ± 4.7*	5.8 ± 4.9	3.6 ± 3.6
Training (hours / week)	6.1 ± 2.4	6.0 ± 2.4	6.3 ± 2.5	6.0 ± 2.7	6.2 ± 2.1	5.2 ± 1.9	6.6 ± 2.5*	5.6 ± 1.8	8.1 ± 3.5*

Results are mean ± standard deviation (SD).

\* Significantly different ( $p < 0.05$ ) to other level of variable.

## Women in Powerlifting

### Women in Powerlifting, Fitness and Strength Sports

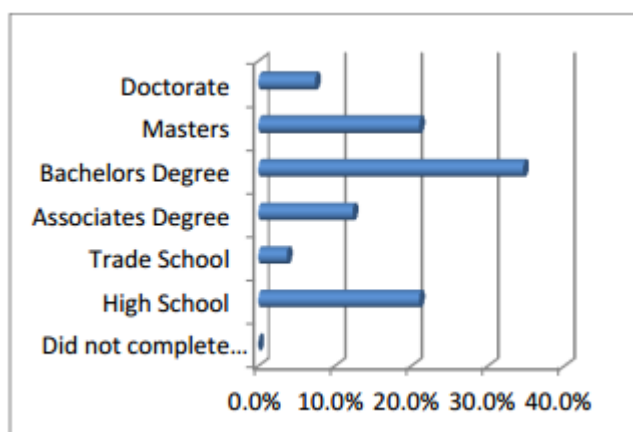


A majority of the respondents were involved in powerlifting with 75.3% competing in raw powerlifting (wrist wraps, lifting belt and some federations allowing knee wraps) and 46.9% of the equipped (special bench shirts, squat and deadlift suits). The research project did not focus on the extent of powerlifting, such as bench press only. What was interesting was that there were a number of respondents that included martial arts, softball, gymnastics, highland games, and distance running.

Of the respondents, 84% actively compete in their sport, 3.7% do not and 12.3% plan on competing. 84% of the total respondents are members of at least one sports federation.

## Education

Female strength athletes appear to be very well educated with 63% of the respondents having a bachelor's degree or above. All were high school graduates and 3.7% graduated from trade schools. A number of the respondents are presently students and several are working on their PhD's and medical doctorates. Only 16% were directly associated with gym, personal training, or related full time careers, and another 16% were healthcare professionals. Careers ranged from students to full time military and information technology to business leaders and engineers to CEOs and entrepreneurs.



## **Competition**

A majority of the women who responded compete well over twice per year in their sports. It is closely split between once per year and over five times per year. One of the questions related to best lifts in competition in which over half of powerlifting women reported lifts over 300lbs, with the exception of the bench press, which averaged 160lbs, and a few with squats over 500lbs. Of the competitors, almost all placed within the top three in at least one competition. Half of the respondents competed in National, Regional (i.e.: Europe) and World level competitions. More than half hold state/regional records or above, in their respective classes, and a third hold multiple records at multiple levels in their sport. With only a few exceptions, competition level lifts and gym max lifts were found to be similar.

## **Length of Time in Sport**

The respondents have participated in their sports from several months to over 30 years. Most of the women trained more than three times per week and a few up to seven days per week. A few (6.2%) train only twice per week, or less. Some of the frequency of training varies depending upon specific or multiple sports and competition preparation. Respondents citing fewer than three times per week also identified 'other' and 'family' duties as reasons for low frequency.

## **Teams and Training**

Of the respondents mostly the powerlifters identified that they train with a team (45.3%). 33.3% of all respondents train solo, 42% sometimes train solo, and 24.7% never train solo. Distance to athletes' training location varied from immediate (home gym) to '2 hours each way.' 63% of the respondents are not personal trainers while 25.9% are and 11.1% have future plans. A majority of the personal trainers are certified through recognized organizations or their associated gym. Only a few (5%) are performing training but do not carry a certification. All but a few of the geared powerlifters identified their gear. The majority identified Titan, Inzer and Metal, in that order, as their choices.

## **Pain Points - Negative Feedback**

This question provided a broad range of responses from no negatives to death threats. From a research standpoint, the last statement, independently, might be ignored. However, similar



statements came from women from different areas of the same regions and cultures. We were expecting a more significant ‘you’ll look manly’ response, but one of the more common negative responses received, usually by other women, family members in particular, ranged from, ‘your uterus will fall out,’ to ‘you’ll damage your uterus,’ and statements about the ability to get married or have children. As expected, ‘be careful,’ ‘don’t lift too heavy,’ and extreme caution statements were cited. The average comment was that negative feedback comes from others in the gym, family members or other women, none of whom are strength sport participants. There were a handful of ‘looking manly’ comments and ‘you’ll look bulky.’

- “The media attitude to strong women – portraying us as unfeminine. This is reinforced by occasional comments from people I meet day to day”
- “Sometimes from a few family members that think it’s impossible to be a clean athlete to be able to lift heavy weight.”

The last comment, above, related to drugs in strength sports, was a minority of responses in this section. About half of responses noted that there was no negative reinforcement and only a few saw negatives in the sport as self-doubt

<http://ironauthority.com/wp-content/uploads/2012/12/WOMEN-IN-STRENGTH-SPORTS-Part-1.pdf>

### **Study review – Greece**

The study is descriptive in nature intending to describe the way consumers behave in a fitness centre. A survey was done based on a structured questionnaire that was personally administered to a purposive sample of 350 respondents from 12 fitness centres that are based in three different cities in Greece. The sample included different sizes of fitness centres in order to cover for different environments. The questionnaire was divided into 6 sections, namely consumer motives; selection criteria; factors affecting satisfaction; behaviour in the centre’s area; behavioural intentions; demographic & psychographic information. The analysis of the data included descriptive statistics, factor analysis and anova. The only scales used from prior research are for the factors that affect customer satisfaction (Kim και Kim, 1995) and for behavioural intentions

## Results

Results show that respondents are 61% women and 39% men, most of them (45%) belong to the 24-35 age category whereas 32 are from 36-50 years old. Almost half of the sample has a bachelor's degree (43%). The majority of respondents are not married (62%) and their income level is mostly (43%) between €1000-2000. Respondents are employed as private employees (40%), civil servants (26%), or free professionals (19%). Also, there are a lot of students members of fitness centres (10%).

The most important consumer motive to become a member of a fitness centre is to enhance their fitness state followed by relaxation – stress reduction (see Table 1 for mean scores for each motive).

**Table 1. Motives to become a member of a fitness centre**

Motives	Mean
Enhance fitness state	4.35*
Relaxation –stress reduction	3.62
Control body weight	3.58
Health reasons	3.52
Increase body mass	2.88
Social interaction	2.39

\*Likert scale from 1= not important to 5 = very important

The selection criteria customers use to choose fitness centre belong to four major groups (as determined by factor analysis on larger list): quality of environment & equipment; supplementary benefits such as massage, solarium or hair-styling; value for money aspects of the offer (opening hours – prices – quality of personnel), and social factors (social relations to personnel, friends already members etc.) Table 2 shows the number of items and the Cronbach a for each scale).

**Table 2: Fitness centre choice criteria**

Factors	No of items	Cronbach a
Quality of environment - equipment	4	0.762
Value for money aspects of the offer (opening hours – prices – quality of personnel.)	3	0.659
Supplementary benefits (e.g. power plate, massage, hair styling, sauna)	11	0.936
Social factors (social relations to personnel, friends already members etc)	4	0.762

Although the sample is dominated by women, 82% use weights whereas only 54% take part in group workout sessions. Most customers use aerobic equipment and weights very often and many times they do what trainers tell them whereas they work out in groups less often (see table 3 for means of usage behaviour). A large 50% work out from 1 to 1.5 hours and 36% from 1.5 to 2 hours. Also, 56% come to the centre from 17.00 up to 21.00 and 94% visit the centre from 2 to 5 times per week. More than half of respondents (55%) are members of the fitness centre for more than 1 year whereas 38% are members for more than 2 years.

**Table 3: Usage behavior in the centre**

Factors	Mean
Aerobic equipment (running belts, bicycles etc.)	3.90*
Weights	3.68
What trainers tell me	2.99
Anything depending on my mood	2.57
Group exercise classes	2.53

\*Likert scale from 1= never to 5 = very often

All categories of factors that affect satisfaction are important according to respondents as it is shown in Table 4. However, the most important ones concern the quality of personnel and the quality of environment of the fitness centre.

**Table 4: Factors affecting satisfaction in the fitness centre**

Factors	Mean
Quality of personnel – professionalism	4.3
Economic factors	4
Quality of environment – equipment	4.3
Security, reliability and organisation of activities	3.9

\*Likert scale from 1= not important at all to 5 = very important

In behavioural intentions, we must note that the most important intention is word-of-mouth communication. Most respondents are willing to provide positive word of mouth for their fitness centre and are quite committed to their supplier in terms of purchase intentions now and in the future. Also, most respondents are not very price sensitive and their complaining intentions are low (see table 5 for means for each type of behavioural intentions).

**Table 5: Behavioural intentions**

Factors	Mean
Word of mouth communication	4,6
Complaining intentions	3,2
Purchase intentions (now and in the future)	3.5
Price sensitivity	3.3

\*Likert scale from 1= extremely unlikely to 5 = extremely likely

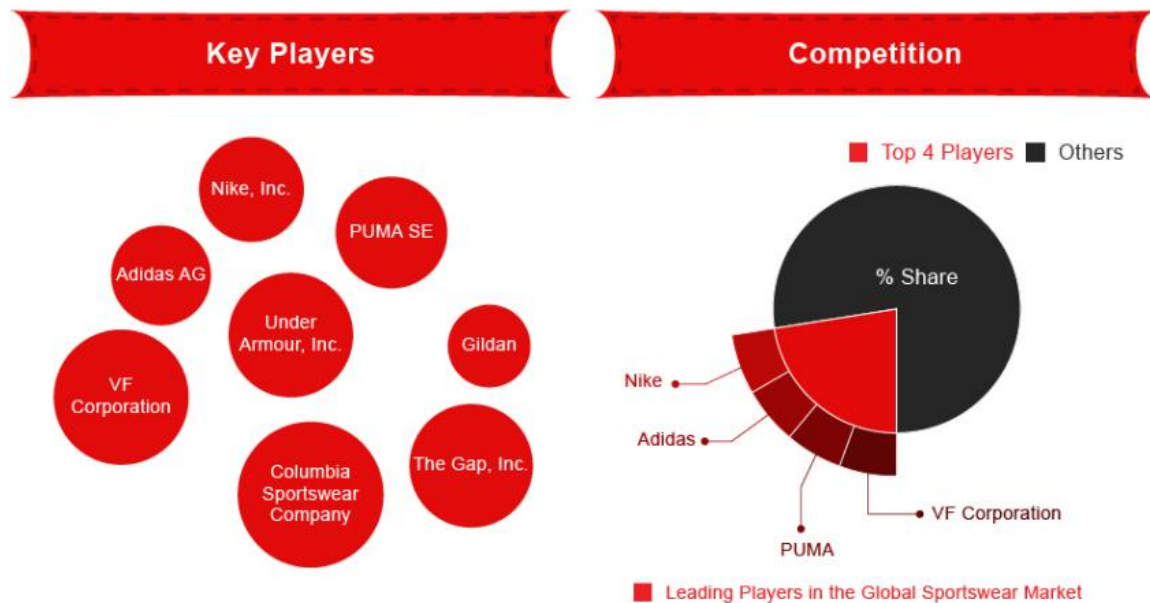
Factor analysis on psychographic factors shows that there are 4 types of customers in fitness centres, the “Sports-savvy consumer” (6 items,  $\alpha = 0,695$ ); the “Health-oriented consumer” (3 items,  $\alpha = 0,767$ ); the “Athletic consumer” (3 items,  $\alpha = 0,668$ ) and the “Pressured consumer” (3 items,  $\alpha = 0,6$ ). Further analysis with an aim to describe these 4 types of customers in terms of behaviour revealed that the different groups have different motives; use different selection criteria, and behave differently in the centre. Also, their satisfaction is affected by different factors, and exhibit different behavioral intentions (see table 6 for a description of each type of customer identified. In motives; selection criteria, and factors affecting satisfaction, the two most important in each case appear in the table in order of importance).

**Table 6: Types of customers of fitness centres and their profile**

	<b>Sports-savvy consumer</b>	<b>Health-oriented consumer</b>	<b>Athletic consumer</b>	<b>Pressured consumer</b>
Characteristics	Like to wear athletic clothing Read sports media Keep informed of fitness trends Follow an athletic way of life Have been involved in sports as amateurs /professionals	Have a specific diet Often follow diets Have a healthy lifestyle	View exercise as fun Consider exercise as a way of life Devote their free time to other forms of exercise (e.g. cycling, swimming).	Are bored in gym Visit gym because their doctor says so Perceive the gym as a necessary evil
Demographics	Men & women; 23-35 years old have bachelor's degree not married work in private sector medium/low income	Women mostly 36-50 & 23-35 y. old have bachelor's degree private employees/civil servants medium/low income	Men & women 23-50 years old have bachelor's degree married; work in private sector & as freelancers.	Women mostly; 36 – 50 y. old, high school graduates work as private employees, civil servants & freelancers medium/low income
Motives	Enhance fitness state Increase body mass	Control body weight Enhance fitness state	Enhance fitness state Relaxation / stress reduction	Health reasons Control body weight
Selection criteria	Quality of environment –modern equipment Value for money aspects of offer	Quality of environment –modern equipment Supplementary benefits	Quality of environment – modern equipment Supplementary benefits	Value for money aspects of offer; Quality of environment – modern equipment
Behavior in the centre	Mostly use aerobic equipment & weights, and sometimes do group exercise classes for 1.5 to 2 hours / visit	Mostly use aerobic equipment and prefer group exercise classes; follow trainers' instructions & use gym 1 to 1.5h	They do anything depending on their mood, for 1.5 to 2 hours.	Mostly use aerobic equipment and anything else depending on the mood for about 1hour.
Factors affecting customer satisfaction	Quality of environment - modern equipment Quality - professionalism of personnel	Quality of environment - modern equipment Quality - professionalism of personnel.	Quality of environment - modern equipment, Security, reliability & organisation	Economic factors Security, reliability & organisation
Behavioral intentions	Positive word of mouth communication (w-o-m comm.) Rarely complain Not sensitive to price Committed to supplier	Positive w-o-m comm. May complain occasionally for temperature, cleanliness, space availability Price sensitive Likely to switch in future	Positive w-o-m comm Rarely complain. Not sensitive to price Committed to supplier	Negative w-o-m comm. Often complain for trainers' professionalism; temperature; cleanliness; space availability Price sensitive Likely to switch in future

[https://marketing.conference-services.net/resources/327/2342/pdf/AM2011\\_0225.pdf](https://marketing.conference-services.net/resources/327/2342/pdf/AM2011_0225.pdf)

# COMPETITORS



[http://www.strategyr.com/MarketResearch/Sports\\_and\\_Fitness\\_Clothing\\_Market\\_Trends.asp](http://www.strategyr.com/MarketResearch/Sports_and_Fitness_Clothing_Market_Trends.asp)

## TOP FITNESS BRANDS NORTH AMERICAN SHARE OF VOICE AUGUST 2015



<https://www.mediamiser.com/blog/2015/09/14/heavy-lifting-with-phil-ho/fitnessbrand/>

The number-one and number-two players in the US activewear space are Nike and Under Armour. These two companies have seen apparel sales mushroom over the past five years. Nike’s apparel sales in the North America segment have more than doubled, from \$2.1 billion

in fiscal 2011 to \$4.4 billion in fiscal 2015. Under Armour's global apparel sales have increased from \$1.1 billion in 2011 to \$2.8 billion in 2015. Most of the growth has come from the US market.

The number-three company in the US athleisurewear market is Hanesbrands (HBI), which had \$1.6 billion in activewear sales in 2015.

<http://marketrealist.com/2016/05/athleisurewear-giants-firms-dominate-activewear/>

## **Nike, Under Armour among those benefiting from increased spending on athletic gear**

Growing demand for activewear, the sporty fashion for both the gym and the streets, has lifted sales for makers of the clothing and the retailers that sell it.

Athletic gear, you might say, is running laps around the competition – doing even better than the overall retail industry, which is humming along as shoppers feel more comfortable about opening their wallets because of the improving economy.

“Activewear is booming, with sales growth exceeding that of the apparel market as a whole,” said NPD analyst Marshal Cohen. “Consumers are drawn to its comfort and versatility, and the fact that it still makes a fashion statement.”

The proof is in the industry's sales results. Nike's NKE -2.69% North America sales leapt 14% for the six-month period ending November 30 from the prior year's level with the help stronger footwear and apparel sales. Smaller rival Under Armour's UA -1.43% sales in the region leapt 29% for the first nine months of 2014. Sales are also climbing at major companies including Lululemon Athletica LULU -3.15% and Foot Locker FL -0.80% .

What's driving this trend? Well, for one thing, activewear is suddenly chic. Nike earlier this year showcased its new gear on top supermodels like Karlie Kloss, while Gisele Bundchen has appeared in Under Armour ads. Their willingness to sign on as ambassadors highlights just how fashionable athletic gear has become.

Americans are taking notes. They are wearing yoga pants, running gear and basketball shoes not just to-and-from the gym, but also around town. Athletic gear is comfortable after all, and analysts say the attention manufacturers are making to fabrics and new colors and styles have helped to broaden the category's appeal.

And there's a lot of opportunity for these athletic apparel makers to grow even more. Lululemon, for example, wants to expand beyond its female yoga-loving roots to reach more men. In the next few years, the company hopes its men's business will grow to \$1 billion in annual sales.

Meanwhile, Nike and Under Armour, whose customers are mostly men, want to do a better job of tackling the women's market. Nike is hoping sales of sports bras, tights and other women's gear can add \$2 billion to annual sales by 2017. Under Armour has said its \$500-million women's business can one day be as big if not bigger than its men's business. Today, sales of the company's men's line is more than double in size.

The industry's opportunities aren't just limited to achieving more balanced sales between the genders. There is international expansion. And for Under Armour, the running shoes industry is particularly alluring.

While athletic clothing sales are mostly taking off, the stock market is still picking winners and losers in the field. Shares of Nike, Under Armour and Foot Locker have each notched gains of 20% or more so far this year, far exceeding the broader market's performance. Stock-market losers include Lululemon, Finish Line FINL -0.62% , and Adidas .

Broadly speaking, running, basketball and yoga gear are selling exceptionally well. But other pockets like golf and hunting are slumping.

Despite those exceptions, the athletic-gear industry is still looking pretty solid overall. Business continue to improve, even for the weaker players. Finish Line's sales rose 8.6% in the latest quarter, for example, while Lululemon's gained 10% and Adidas global revenue grew 9%. Mass retailers are paying close attention and will likely stock their shelves with more athletic gear in 2015.

"Retailers and manufacturers across the board know that activewear is active, and they all want a piece of the action," Cohen said.

<http://fortune.com/2014/12/25/athletic-apparel-top-performer>

Here are some of the online shops which sell fitness shirts and hats:

## Bodybuilding.com

The screenshot shows the Bodybuilding.com website interface. The top navigation bar includes links for STORE, TRAINING, FIND A PLAN, NUTRITION, WOMEN, VIDEOS, and APPS. A search bar is located on the right. The main content area displays search results for 'fitness-clothing/hats.html'. On the left, there is a sidebar with 'SHOP BY CATEGORY' and 'SHOP BY GOAL'. The main results area shows 1-20 of 56 results, sorted by 'Best Sellers'. Four products are listed:

- EVLUTION NUTRITION New Era Snapback Hat**: High Quality Adjustable Headwear Premium, One Size Fits All Snapback Hat. Price: \$24.99. Rating: 9.8 out of 10. In Stock.
- Bodybuilding.com Clothing Lift Life Snapback Hat**: Buy A Hat, Transform A Life. 100% Of The Proceeds Help Provide Weight Rooms And Fitness Equipment To Underfunded Schools. Price: \$24.99. Rating: 10 out of 10. In Stock.
- Bodybuilding.com Clothing FlexFit B Swoosh Hat, White**: Comfort & Style! Great Hat For Any Occasion! Price: \$9.99. Rating: 9.6 out of 10. In Stock.
- Bodybuilding.com Clothing Knit Beanie, Black**: Ultra-Soft Acrylic! Don't Let The Cold Weather Slow You Down! Price: \$9.99. Rating: 9.8 out of 10. In Stock.

<http://www.bodybuilding.com/>

## About Bodybuilding.com

Bodybuilding.com is the world's largest online sports nutrition store. Based in Boise, Idaho, U.S., it offers more than 11,500 health and fitness supplements and accessories, and ships to more than 155 countries. Bodybuilding.com helps more than 26 million people every month achieve their health, fitness and appearance goals by offering over 35,000 pages of FREE information, including more than 25,000 articles and 10,000 videos, expert online trainers and new content added daily. For more information please visit [www.bodybuilding.com](http://www.bodybuilding.com).

[http://www.sajan.com/fileadmin/sajan/documents/Collateral/Sajan\\_CaseStudyBodybuildingcom.pdf](http://www.sajan.com/fileadmin/sajan/documents/Collateral/Sajan_CaseStudyBodybuildingcom.pdf)



**Global Rank** ①  
Worldwide

**869**

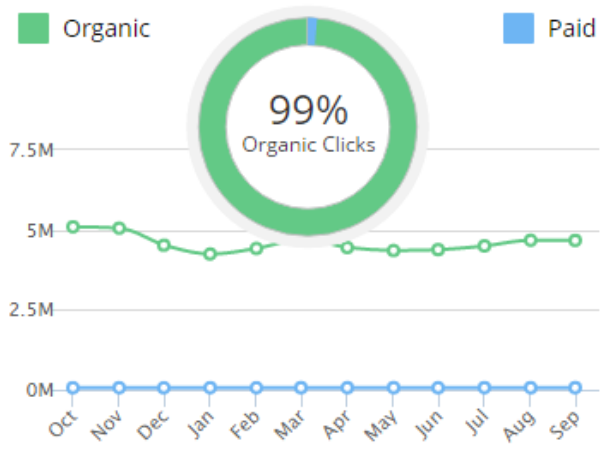
**Country Rank** ①  
United States

**428**

**Category Rank** ①  
Beauty and Fitness > Fitness [Edit](#)

**1**

Inbound Clicks from Google - Organic vs. Paid ?



Top Organic Competitors ?

1	muscleandfitness.com
2	mensfitness.com
3	muscleandstrength.com
4	t-nation.com
5	breakingmuscle.com

Top Paid Competitors ?

1	sbmuscle.com
2	gnc.com
3	musclmakernutrition.com
4	supplementwarehouse.com
5	powerbar.com

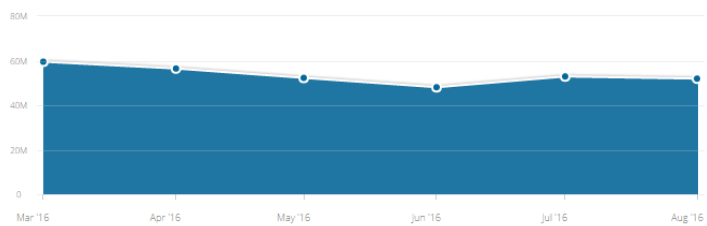
Traffic Overview ①

Estimated Data [Claim Your Website](#)

Total Visits ①

On desktop & mobile web, in the last 6 months

[Embed Graph](#)



Engagement

Total Visits	<b>51.90M</b>
Avg. Visit Duration	<b>00:03:47</b>
Pages per Visit	<b>2.97</b>
Bounce Rate	<b>56.55%</b>

## Traffic by countries ①

On desktop

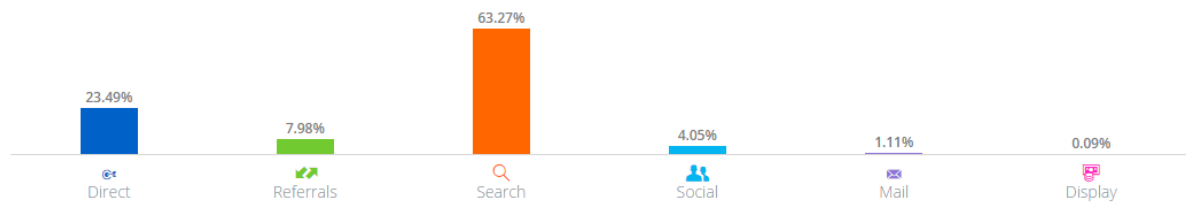


United States	42.09%
United Kingdom	8.75%
Canada	5.37%
India	4.56%
Australia	3.55%

## Traffic Sources ①

[Embed Graph](#)

On desktop



## Social ①



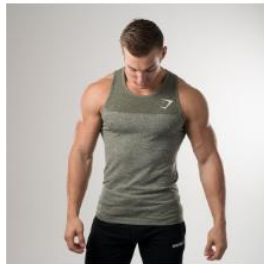
Facebook	51.25%
Reddit	21.46%
Youtube	15.30%
Pinterest	4.53%
Twitter	3.56%

<https://www.similarweb.com>



Home > Mens > Shop By Category > Tanks

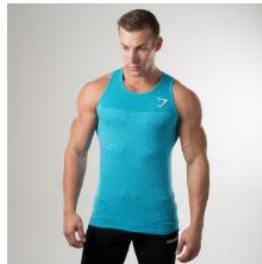
SORT BY: NEW



GYMSHARK PHANTOM SEAMLESS TANK - ALPINE GREEN  
\$38.00



GYMSHARK PHANTOM SEAMLESS TANK - CHARCOAL  
\$38.00



GYMSHARK PHANTOM SEAMLESS TANK - BLUE  
\$38.00



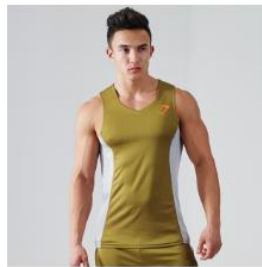
GYMSHARK PHANTOM SEAMLESS TANK - GREY  
\$38.00



GYMSHARK DRY COURT TANK - WHITE  
\$33.60



GYMSHARK DRY COURT TANK - RED  
\$34.00



GYMSHARK DRY COURT TANK - KHAKI  
\$34.00



GYMSHARK DRY COURT TANK - BLACK  
\$34.00

<https://www.gymshark.com/mens/shop-by-category/gym-tank-tops>

🌐 Global Rank ⓘ  
Worldwide  
**#50,983**↓

🇺🇸 Country Rank ⓘ  
United States 🇺🇸  
**#30,670**↓

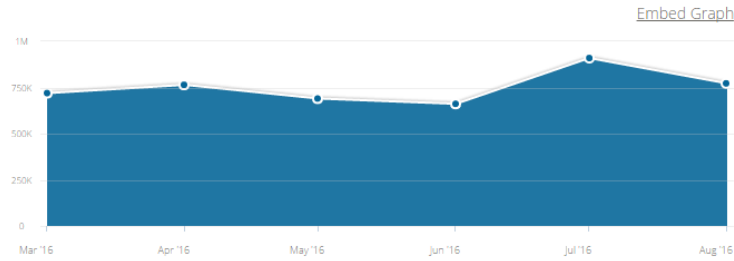
🛒 Category Rank ⓘ  
Shopping > Clothing [Edit](#)  
**#840**↓

# Traffic Overview <sup>①</sup>

Estimated Data [Claim Your Website](#)

## Total Visits <sup>①</sup>

On desktop & mobile web, in the last 6 months



## Engagement

Total Visits	<b>772.10K</b>
Avg. Visit Duration	00:03:28
Pages per Visit	4.80
Bounce Rate	33.71%

## Traffic by countries <sup>①</sup>

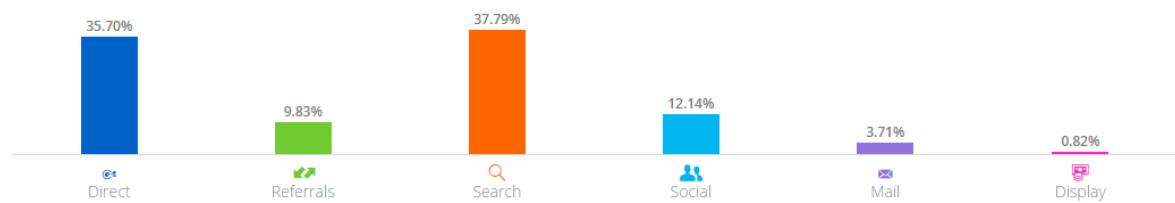
On desktop



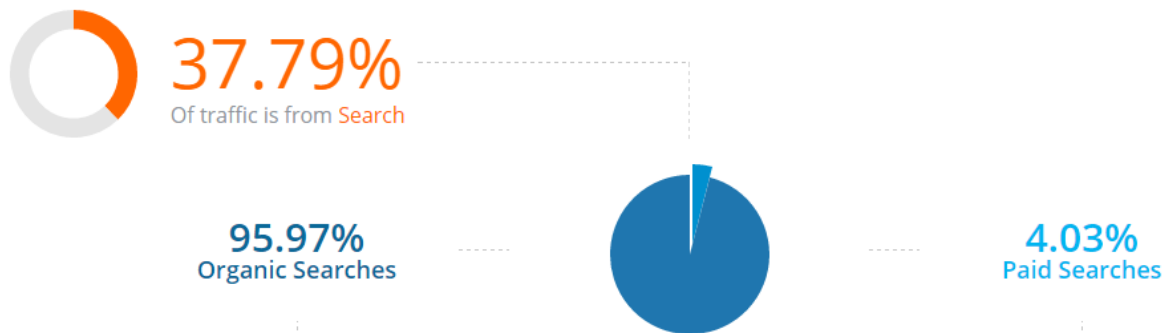
United States	<b>27.80%</b>
United Kingdom	17.16%
France	4.63%
Norway	4.45%
Canada	4.36%

## Traffic Sources <sup>①</sup>

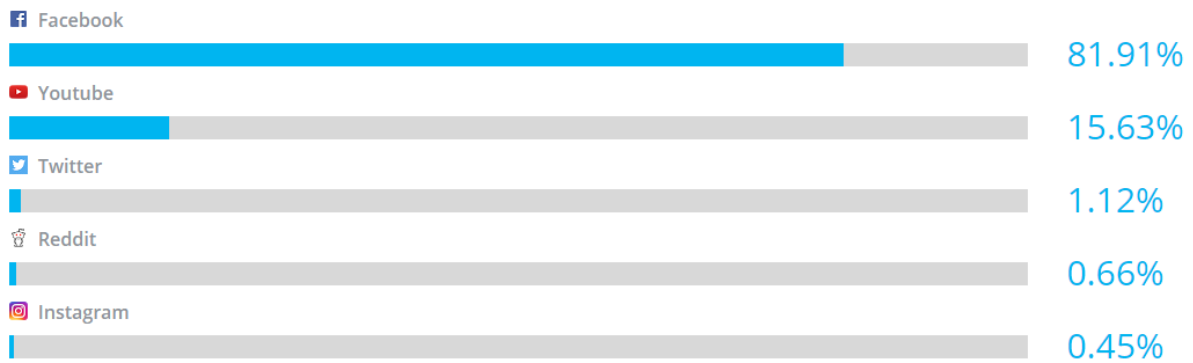
On desktop



# Search <sup>①</sup>



# Social <sup>①</sup>



<https://www.similarweb.com>

## Metalgearclothing.com

metalgearclothing.com/collections/mens-tank-tops









**METAL GEAR**

0 items (\$ 0.00)

HOME MENS WOMENS MGC PREMIUM ACCESSORIES BLOGS ABOUT US CONTACT Search...

MEN'S TANK-TOPS 20 items total SORT BY Sort Products

Metal Gear Clothing Men's Tank-Tops

 Abstract We Grind Tank \$ 28.00	 Rise Alarm Tank \$ 28.00	 Varsity - White/Graphite \$ 28.00	 Varsity - Black/White \$ 28.00
			

<http://metalgearclothing.com/>

The screenshot shows the website [taintedindustries.com/tank-tops/](http://taintedindustries.com/tank-tops/). The navigation bar includes links for HOME, MY ACCOUNT, COMPARE (0), GIFT CERTIFICATES, and MY CART (0). The main header features the Tainted Industries logo with the slogan "NOT like the REST." and navigation links for MENS APPAREL, WOMENS APPAREL, and DISCONTINUED.

The left sidebar contains a menu with categories: Mens Apparel, Womens Apparel, Sponsored Athletes Apparel, and Discontinued. Under "Browse By Tag", there are sub-categories: 3/4 Sleeve Tshirt, Burnout, Fashion, Fit, Style, and Tshirt.

The main content area displays three product listings, each with a "Choose Options" button and a "Compare" button:

- FOKKENBEAST Tank**: \$22.00, 5 stars. Image shows a black tank top with "#FOKKENBEAST" printed on it.
- NOT like the REST**: \$22.00, 5 stars. Image shows a grey tank top with "NOT like the REST" and "BE YOU" printed on it.
- Not Playin Jersey Tank**: \$22.00, 5 stars. Image shows two tank tops, one with "NOT PLAYIN" and another with "TAINTED 12".

<http://taintedindustries.com/>