

ACTIVEWEAR

A N I N - D E P T H A N A L Y S I S

CATEGORY OVERVIEW



**US MARKET:
\$97B IN 2015
36% OF WORLD
MARKET***

*MORGAN STANLEY/EUROMONITOR DATA

LANDSCAPE OF BRANDS

ESTABLISHED ACTIVEWEAR

NON-ACTIVEWEAR BRANDS MOVING
INTO ACTIVEWEAR

EMERGING ACTIVEWEAR

CATEGORY ARCHITECTURE



LIFESTYLE



GENERAL
ACTIVEWEAR



ACTIVITY-SPECIFIC
ACTIVEWEAR
(PERFORMANCE)

ESTABLISHED PLAYERS



ADDING ACTIVEWEAR TO THE ASSORTMENT

NET-A-PORTER

ZARA

H&M

TORY BURCH

KOHL'S

COLUMBIA

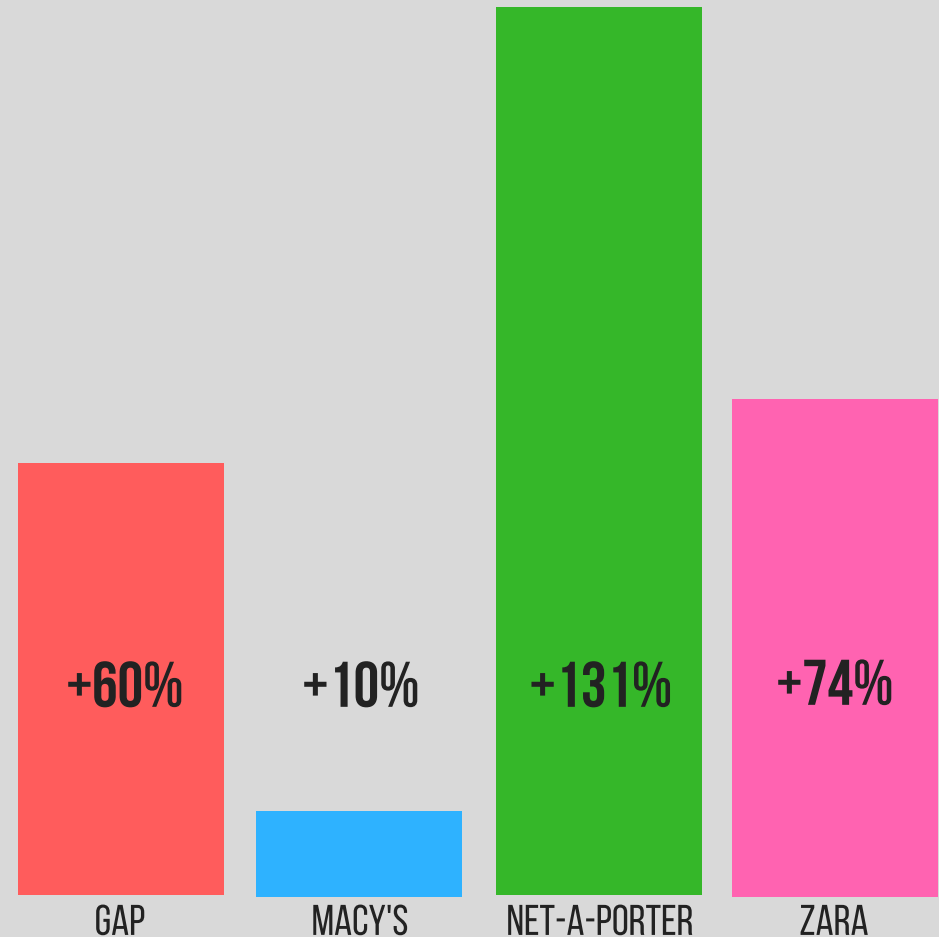
GAP/OLD NAVY

ABERCROMBIE

VICTORIA'S SECRET

FOREVER 21

WE LOOKED AT BRANDS WHOSE HISTORIC FOCUS IS IN OTHER CATEGORIES AND THEIR RATE OF ADDING ACTIVEWEAR PRODUCTS OVER THE PAST YEAR.

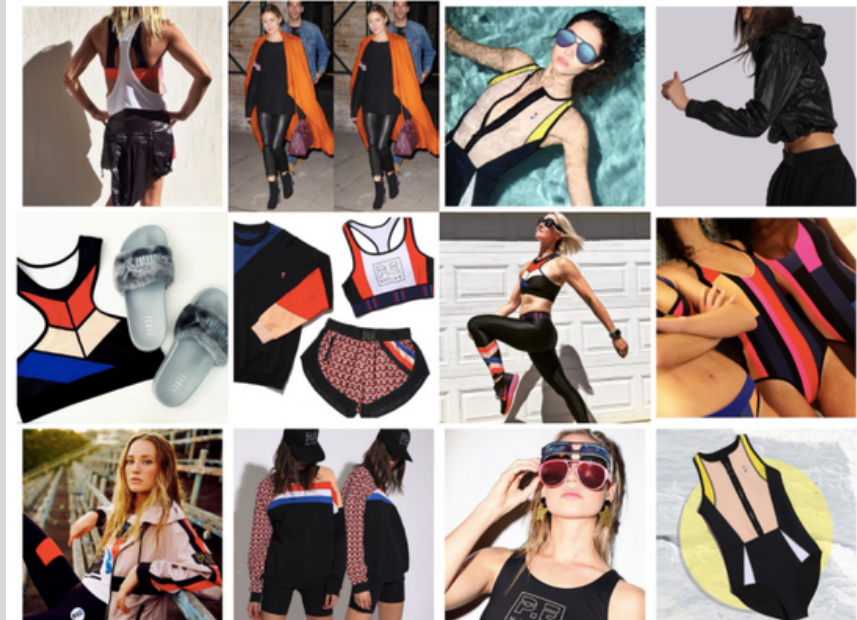


EMERGING BRANDS

WITH MORE STYLES AND
HIGHER PRICE POINTS, THESE
ARE PROPELLING THE 4.3%
EST. CATEGORY CAGR FROM
2015-2020

KITH
SUPREME
BANDIER
OUTDOOR VOICES
TRACKSMITH
PE NATION
ALALA
THE UPSIDE
CARBON38
YOGASMOGA

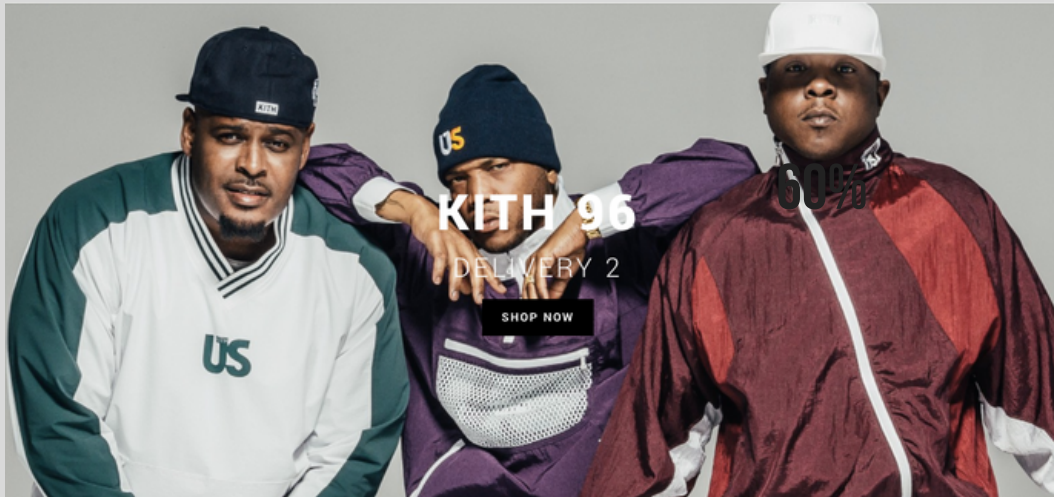
PE NATION



A BRAND THAT
EMBODIES THE
BLURRING OF THE
LINE BETWEEN
SPORTS AND
LIFESTYLE.

AVERAGE PRICE:
PANTS: \$113
TOPS: \$81

KITH



KITH IS A MASSIVELY POPULAR STREETWEAR
BRAND THAT CONTINUALLY LAUNCHES
PRODUCTS IN MINI BATCHES FUELING SCARCITY
DEMAND AND COLLABORATES WITH BRANDS
INCLUDING NIKE AND ADIDAS.

AVERAGE PRICE:
PANTS: \$270
TEES: \$132

INFLUENCERS

INFLUENCERS IN THIS SPACE ARE A MIX OF ATHLETES, DEDICATED FITNESS BUFFS, AND CELEBRITIES, MANY OF WHOM ARE ENDORSED BY MAJOR ATHLETIC BRANDS.

CELEBRITIES INCLUDING RIHANNA AND KANYE WEST HAVE CREATED THEIR OWN CAPSULE 'ATHLEISURE' COLLECTIONS.



AUSTRALIA IS AN INFLUENTIAL ACTIVEWEAR MARKET WITH ITS OUTDOOR CULTURE AND WARM CLIMATES.

2015 REVENUES



HANNAH
BRONFMAN
332K



KAYLA
ITSINES
5.7M



THE
ROCK
68.5M

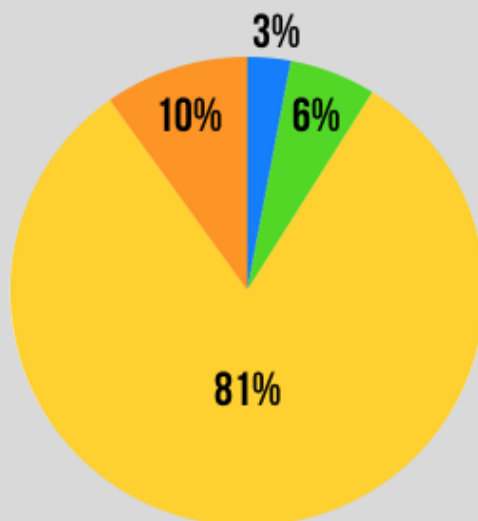


CURTIS
WILLIAMS
25.1K

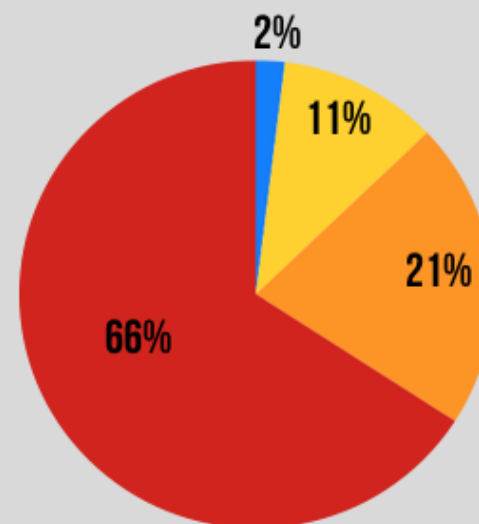
RECENTLY INTRODUCED: WOMEN'S

PRODUCTS THAT
HAVE DROPPED IN THE
PAST TWO WEEKS.

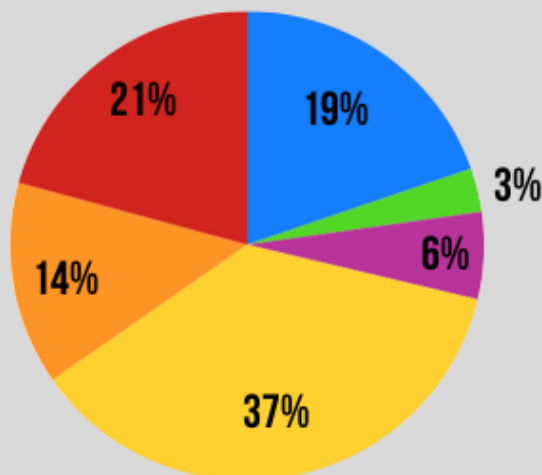
ATHLETA



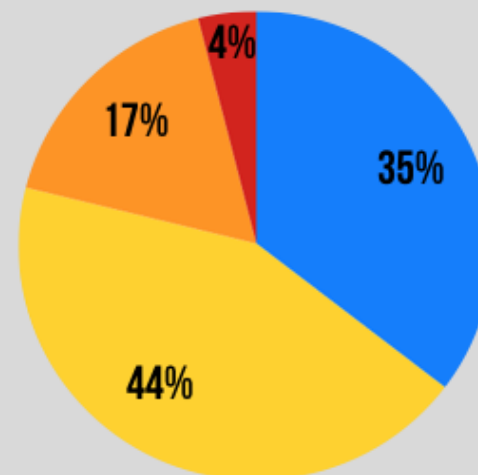
**LANE
BRYANT**



**UNDER
ARMOUR**



**SWEATY
BETTY**



ACTIVEWEAR
CATEGORIES:

PANTS

SHORTS

SPORTS BRAS

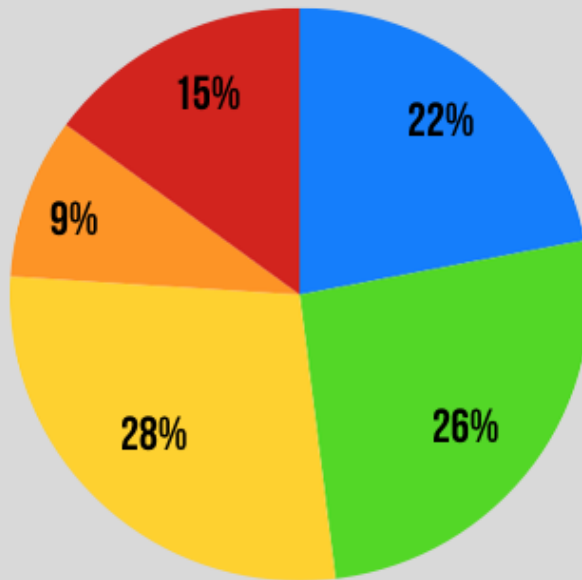
TOPS

JACKETS

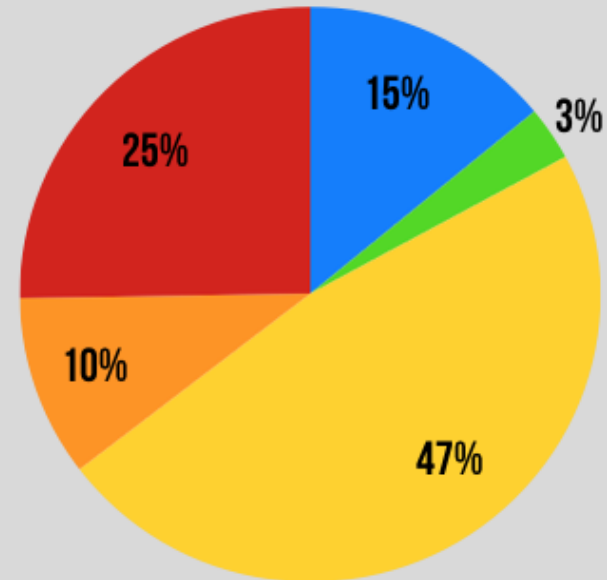
SWEATERS/HOODIES

RECENTLY INTRODUCED: MEN'S

PRODUCTS THAT HAVE
DROPPED IN THE PAST
TWO WEEKS.



LULULEMON



UNDER ARMOUR

ACTIVWEAR
CATEGORIES:

PANTS

SHORTS

SPORTS BRAS

TOPS

JACKETS

SWEATERS/HOODIES


STATE OF THE INDUSTRY

**AN AUDIT OF 5 ACTIVEWEAR BRANDS SHOWED
THAT BETWEEN OCTOBER 2015-2016**



**THERE WERE
40% MORE
ACTIVEWEAR SKUS
ON OFFER**

YET...



**A 1% DECREASE IN
AVERAGE PRICE**

WITH MORE BRANDS
JOINING THIS SPACE,
THERE'S A GLUT OF
PRODUCTS IN THE MARKET.

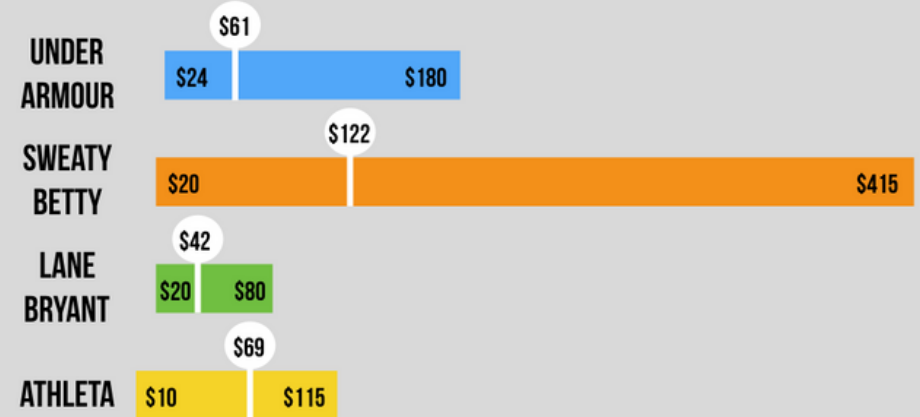
WITHOUT DIFFERENTIATION,
MOST BRANDS WILL FACE
CONTINUED DOWNWARD
PRICE PRESSURE.

PRICING BY CATEGORY: WOMEN'S

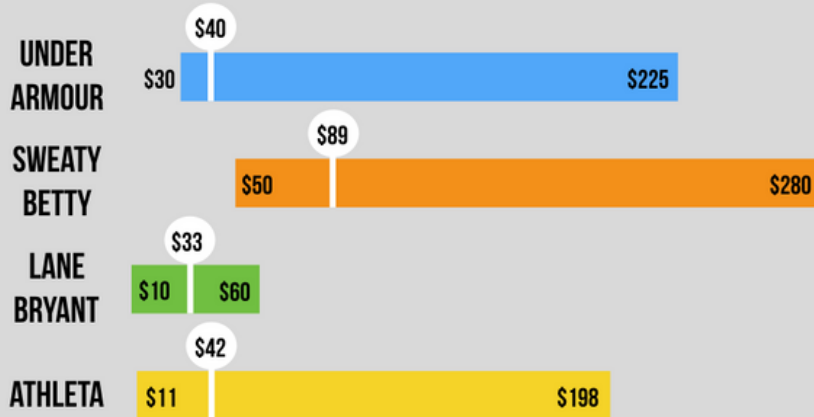
SPORTS BRAS



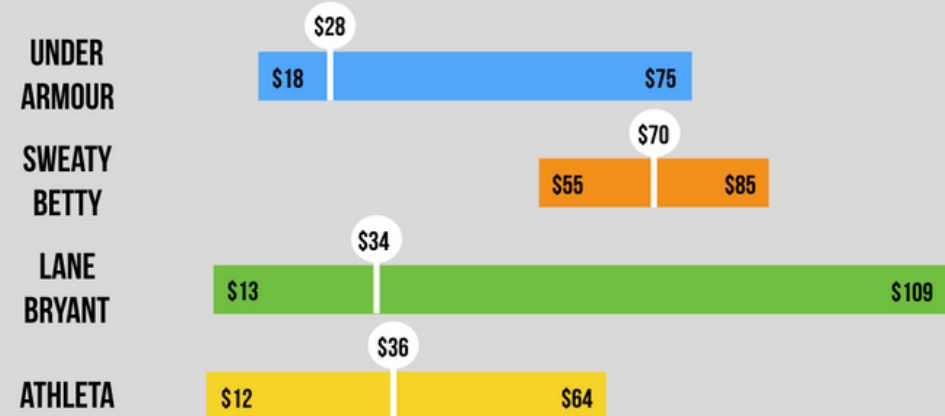
PANTS



TOPS

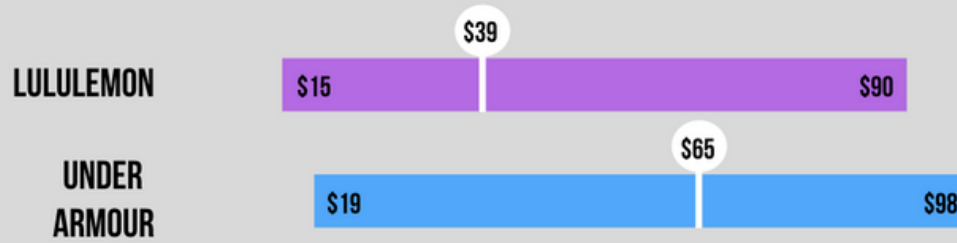


SHORTS

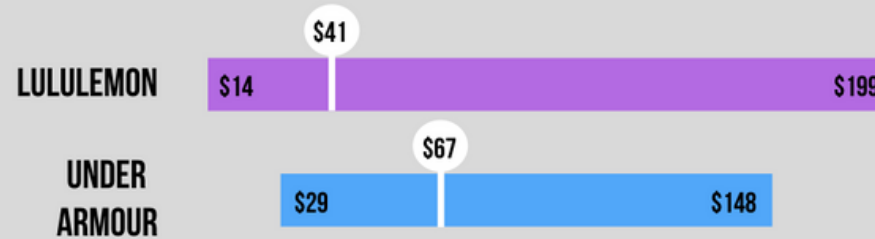


PRICING BY CATEGORY: MEN'S

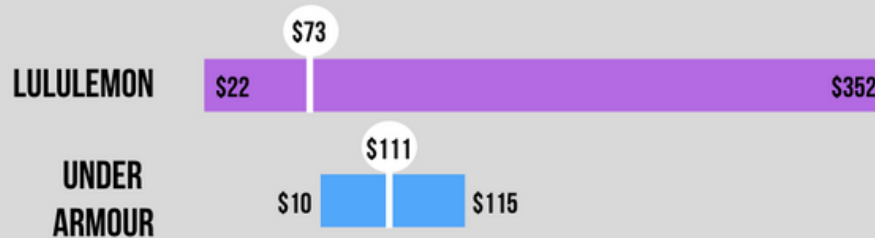
SHORTS



TOPS



PANTS



AVG. PRICE POINT



PRICE RANGE

ACTIVEWEAR CATEGORY EXPERTISE DELIVERED.

TALK TO US: HELLO@STYLESAGE.CO

STYLE**SAGE**