



# THE ACTIVEWEAR REPORT: Analyzing Sports Fashion Trends

The history, psychology, and top trending categories of activewear today





# THIS IS CROBOX

As experts in the fields of eCommerce, data, and consumer behavior, the Crobox team has a unique set of skills and knowledge. With this, we want to help brands stay on top of the market, and make retailers into industry leaders. How? Through the years, we've helped top activewear retailers sell their products online in what we consider a more human way (vis a vis guided selling and zero-party data).

Today, our activewear industry report covers top trends, history of sportswear, consumer buying behavior, and a category analysis of outdoor, athletic footwear, and athleisure. Throughout, we'll give you a glimpse of Crobox data to help you deep-dive and get a grip on your industry as a whole.

Get stuck in. Here's your industry report!

**Rodger Buyvoets**  
Crobox CEO & Founder

A handwritten signature in black ink, appearing to read 'R Buyvoets', with a long horizontal flourish extending to the right.

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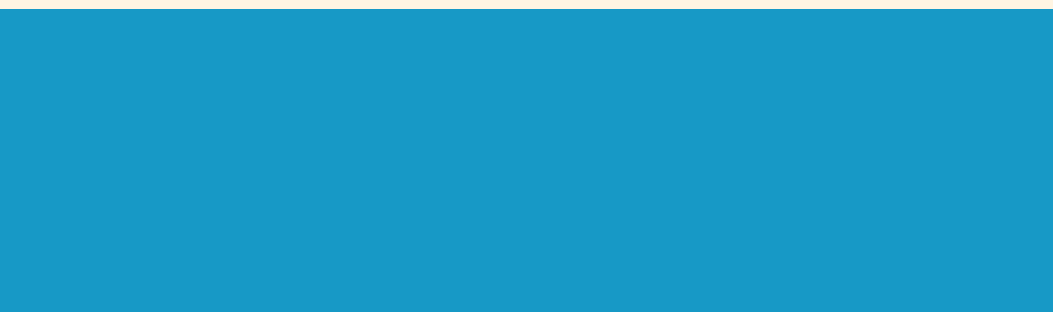
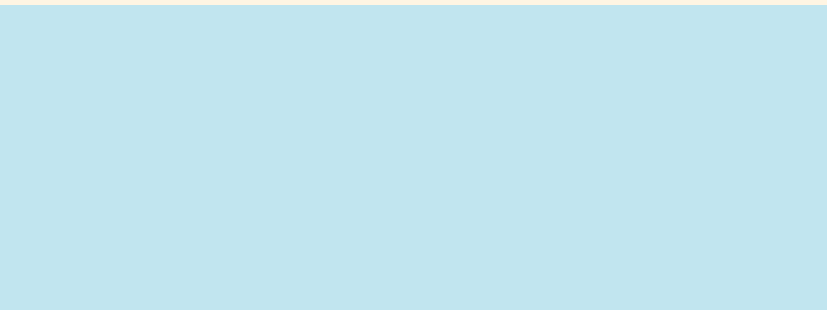
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# INTRODUCTION

If you're living and shopping in the 21st century you've no doubt witnessed the rise of activewear. Activewear is on your doorstep, in the streets, at the clubs you frequent, and on the holidays you take. From yoga leggings to heat tech, ski gear to sneakers, activewear is chosen as the consumer's number one product of choice – regardless of the impulse to be fashionable or functional.

More people are working out than ever before. With two years of lockdown across many countries, individuals started choosing active and outdoor holidays such as hiking and bird-watching. Exercise is up 88% more than in the last three years, and half of the world's population say they will continue to work out despite a dramatic change in lifestyle (i.e., the reopening of clubs and gyms and a new normal way of living).

As a result of the COVID-19 pandemic, retailers and consumers have also seen the rise of the wellness market. Apparel and footwear retailers have responded by producing products that promote healthy, more active, lifestyles. Wellness is at the crux of their campaign messaging, and sports fashion now goes hand-in-hand with consumer wellbeing.

Psychologically, it seems that functional clothing has not only evolved into a fashion statement but one that represents the greater good (sustainability, self-care, and self-expression). And where wellbeing takes over retail marketing, comfort and performance are pushed as unique

selling points (USPs) for activewear products. In other words, the more performance-enhancing attributes the better. Or, the comfier the better.

Parallel to this, we see the importance of inclusivity and diversity in a brand's marketing strategy. With more participation of women, the disabled, and older populations in sports, activewear brands react by offering more inclusive product sizes, categories, and messages. Women's activewear now makes up 35% of the market but will increase in the years to come.

The activewear market and rise of sports fashion represent a retail market in flux. 'Holistic' shopping and customer-centric marketing are imperative to the success of activewear brands. More often than not, benefits outshine attributes.

This report will examine to what extent this is the case for products that rely on their attributes. We'll look at the psychology behind activewear consumption to trace how and why consumers value these products beyond their appeal as functional sports products. Then, by doing an industry analysis as a whole, we'll look at activewear in the context of its top trending categories:

- Outdoor
- Athletic footwear (running shoes and sneakers)
- Athleisure

Supplanting our research with unique data from our own activewear clients, our aim is to analyze consumer behavior in the context of the retail market today.

# CHALLENGES

Top challenges facing activewear brands and products

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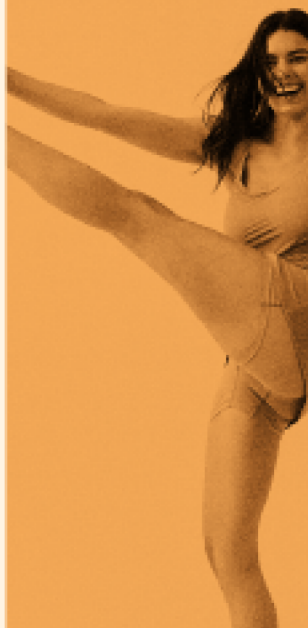
*Sports retailers are crippling in similar ways. Many are businesses that naturally grew out of wholesalers not made for DTC. Other brands that have started as pure players online are native, with better IT infrastructures.*

*- Claudia Moron, eCommerce Manager at Love Stories  
(formerly New Balance)*

The activewear market is fragmented



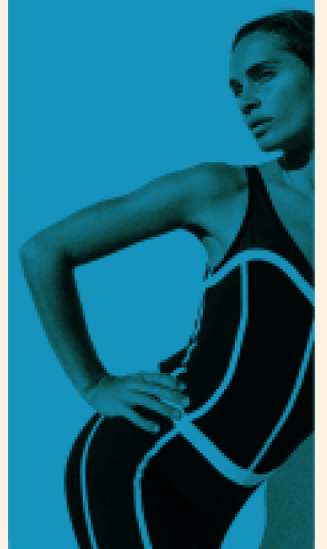
Fitness and health are primary trend-drivers



Omnichannel will become an expectation



Competition from luxury big brands is coming



## The activewear market is fragmented

Shoppers want to shop anywhere and at any time. With multiple touchpoints available to both the consumer and brand, this disrupts traditional shopping experiences. For example, with the rise of initiatives like click-and-collect or BOPIS (buy online pick up in-store), the traditional divide between brick-and-mortar and eCommerce is fading.

The goal for activewear retailers is to bridge the bricks to clicks gap in a way that innovates the in-store experience while bringing the human element online.

In many countries, the pandemic is over, but with the war in Ukraine and economic instability worldwide, there is no shortage of supply chain disruptions. In February 2022, inflation was up 8.5% YoY in the U.S.



Source: Isaora



Source: OutdoorVoices

## Fitness and health are primary trend-drivers

What's important for activewear brands to consider when selling products is the shopper's context. Health, wellness, and fitness are top-of-mind for shoppers buying activewear. Of course, there are certain psychological drivers that are at play in the shopper's decision-making process (which we'll take a look at in our chapter on psychology).

But the main rational reason consumers invest in activewear is to be healthy and appear fit. Brands that don't have a similar ethos of well-being and health will fall short. Here, as in many other categories, authenticity is key.



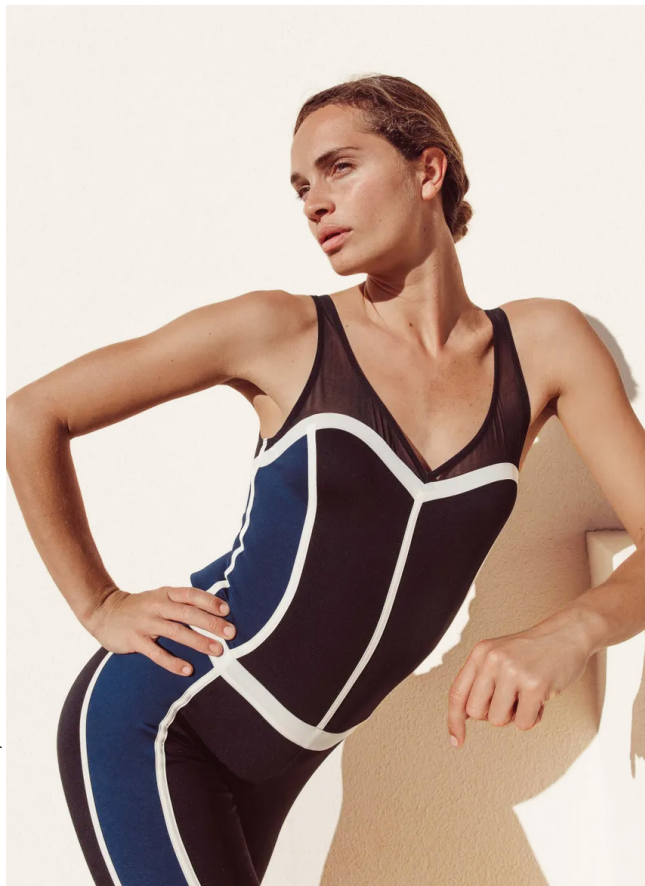
## Omnichannel will become an expectation

While consumers expect the same brand leadership and product offering across all channels (consistency is key), they demand these experiences be personalized. Omnichannel is expected – personalization is demanded.

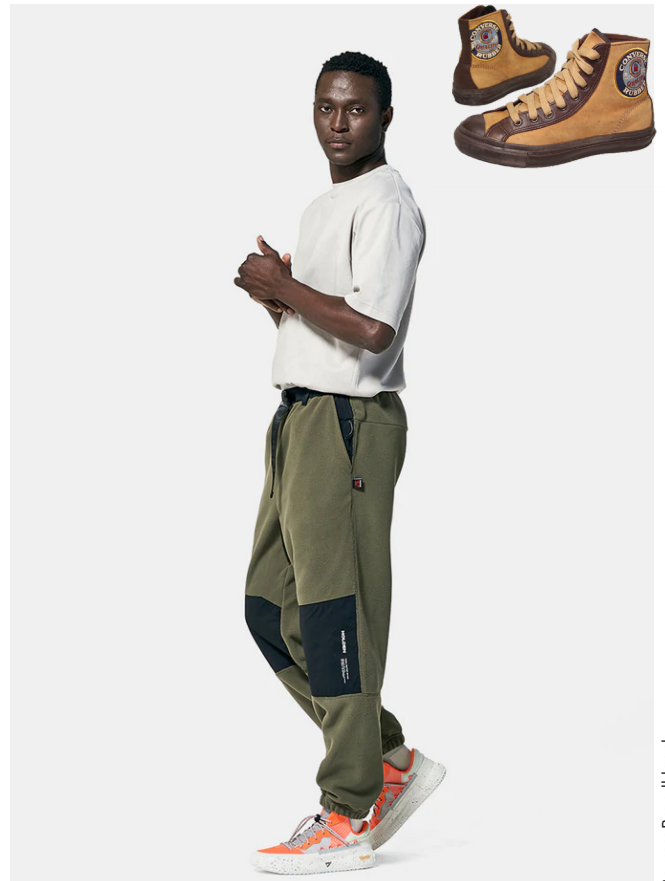
Many brands are struggling to be fully in control of their own ecosystems, and some are even creating their own marketplaces independent of behemoths like Amazon, eBay, or Alibaba. This makes omnichannel as competitive as personalization is lacking.

For consumers who want individualized experiences across distribution channels, activewear brands need to start by having an understanding of who is shopping on which channel and, more importantly, how.

Activewear brands that are shifting from commerce to content will have to invest in an on-brand UX while remarketing to individuals in a way that is both data-compliant and personal. This will separate the omnichannel strategy of pure player brands (like Amazon) from brands that are selling reactively across multiple distribution channels.



Source: Ernest Leoty



Source: Brandblack

## Competition from luxury big brands is coming

Activewear used to attract a niche audience. However, it's become so popular that even luxury brands are embracing disruption and jumping aboard. This is particularly true for the sneaker market.

What makes this challenging for smaller activewear brands is that luxury labels have more resources and designers to expand and delight in activewear marketing and selling. Luxury brands can also offer higher quality products and celebrity endorsements to justify their price points.

What this shows is that everyone wants a piece of the activewear market. With luxury brands in the race, it's even harder to stand out. Yet many of these challenges also represent an opportunity: Fragmentation and disruption can drive growth. Relying on fitness and health will see activewear brands win the race for customer-centricity.

# CHAPTER ONE: ACTIVEWEAR IN CONTEXT

## A brief history of sportswear



**1906:**

New Balance Athletics, Inc. is founded making it the oldest sports apparel company in the world.

**1908:**

Converse Rubber Corporation opens for business.



**1908:**

Women are allowed to swim both recreationally and for sport, and the first bathing suit for women is made.

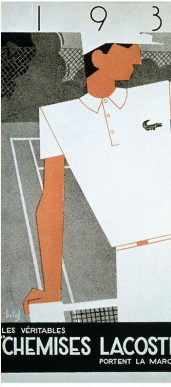
**1911:**

The Titanic hosts an indoor gym where travelers can exercise. Activewear is worn to show people with the time to 'work out', i.e., the wealthy.



**1917:**

Converse's Chuck Taylor sneaker is considered the world's greatest sneaker, and was produced as an All-Star basketball shoe.



**1933:**

Rene Lacoste developed the polo shirt for

**1968:**

North Face is founded in the United States.

**1970s:**

Lycra and Spandex dominated the market thanks to the rise in popularity of aerobics and cycling.



**1977:**

ASICS is founded in Japan

**1979:**

The term "athleisure" is first used in an issue of Nation's Business.



**1984:**

Nike turns 'air' into a buzzword with the help of Michael Jordan and the 'Air Jordan' basketball shoe.



**1994:**

Nike shoes are immortalized by Gump when he wears them as he runs the world in the winning film.



Activewear products transform just as textile and performance technologies evolve. This market has expanded at unprecedented rates. Triggered by global events like the COVID-19 pandemic, Black Lives Matter, and the women's emancipation movement, activewear has now reached an all-time high in the 21st century. How did activewear start? How did sports gear evolve into fashion statements? A brief timeline.



the modern tennis.



**1939:**  
Le Coq Sportif created the world's first version of the 'tracksuit'.



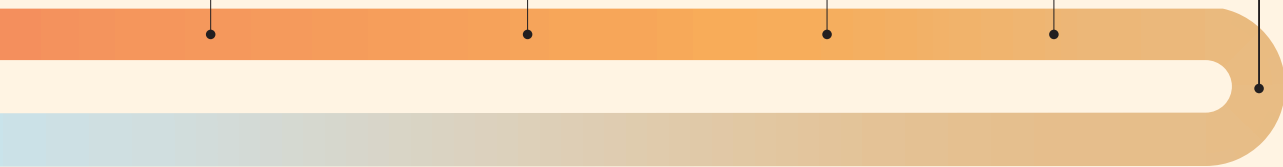
**1949:**  
Adidas is founded in Germany.



**1960s:**  
Onitsuka Tiger becomes the top brand for racing and training shoes.

**1964:**  
Nike is founded as Blue Ribbon Sports by track-and-field coach Bill Bowerman and his former student Phil Knight.

**1938:**  
Columbia Sportswear Company is founded in the United States.



**1995:**  
ASICS puts GEL packets in its Kayano running shoe, demonstrating again an innovation in features.

**1997:**  
Lululemon is founded.

**2018:**  
Nike launches the 'sports hijab' for female athletes.

**2020:**  
For Nike, sports apparel takes up 69% of revenue and sports footwear takes up 32%

y Forrest wears s around Oscar-



**2021-2027:**  
CAGR OF ACTIVEWEAR MARKET IS EXPECTED AT 3.7%

# CHAPTER TWO: ACTIVEWEAR BEHAVIOR EXPLAINED

## The psychology of activewear

**W**hen fitness transforms into fashion, products are always accompanied by the complex world of purchase decisions. There exists, more often than not, subconscious drivers that tell you a little bit more about how shoppers make choices based on who they are as individuals. At Crobox, we're committed to discovering the why behind the buy. With the help of our in-house behavioral psychologist and academic research, we unpacked the psychology behind activewear.

### Enclothed cognition:

According to this principle, clothing can influence behavior. E.g., running shoes makes the individual one step closer to the behavior of running.



### Conspicuous Consumption:

Activewear products are bought to show off one's socioeconomic status. E.g., Polos make an individual appear wealthy and posh, and wearing outdoor gear will make someone seem outdoorsy.



### Influencer Psychology:

Michael Jordan cemented the celebrity appeal of being athletically superior. Activewear products leverage Authority and Social Proof.



# ENCLOTHED COGNITION

Can clothing influence behavior? This is the premise of a theoretical framework called Encllothed Cognition: 'the systematic influence that clothes have on the wearer's psychological processes'.

## Example: Running shoes.



Source: On Running

Imagine waking up and thinking 'I want to go running'. Putting on running shoes and a running tracksuit will make you one step closer to accomplishing that behavior. In this way, running shoes are the nudge that might just get you out the door.

*"Wearing running shoes is halfway towards the behavior of running. Clothes can set your intention from the beginning, and with activewear, that intention becomes 'being active'. In this way, wearing clothes can make it more likely that the person will carry out the behavior."*

- Joris Fonteijn, Chief Product Officer at Crobox

According to the principle of Encllothed Cognition, activewear can represent your inner motivation and help facilitate the behavior of being fit. Many activewear products carry the symbolic motivation of being fit, giving the consumer the tools to carry this behavior out (e.g., the behav-

ior, 'now that I bought expensive running shoes, I should probably use them to go running').

On a more practical level, however, athletic gear like workout leggings are designed to support a workout. In a social context, if someone is wearing leggings but doesn't practice the activity meant for leggings, it could cause friction or rejection for those persons that do practice the activity and belong to the active 'in-group'.

Many activewear products are hence based on a kind of recognition. Meaning, many consumers will buy activewear to signal to the in-group of active people that they are working out. This is where fitness transforms into fashion.

*"Wearing activewear is like the Halo Effect. Where more 'beautiful' people are privy to positive traits (based on the perspective of others), individuals who wear activewear may also be seen as to excel in other areas of their life."*

- Joris Fonteijn, Chief Product Officer at Crobox

# CONSPICUOUS CONSUMPTION

Conspicuous consumption is the buying of products or goods to show off one's socioeconomic status. This behavior is typically associated with the wealthy and has often been used to explain the behavior of luxury shoppers.

## Example: From sportswear to streetwear (Adidas' Stan Smith).

The streetwear trend has its origins in activewear – or at least in the peak of athleisure in the '80s: Comfortable tracksuits, sneakers, and parkas were taken from urban culture and started to be worn every day.

Take Adidas' Stan Smith. Originally a tennis shoe in 1955 and then marketed to the masses over the course of the years, the Stan Smith today is more of a fashion item than a sports shoe.

*“Fashion is always going to be correlated to peacocking behavior, and activewear is no exception. It becomes a fashion statement as soon as people see others doing it. Think of the big activewear brands out there – logos have become more important than the products sold.”*

*– Joris Fonteijn, Chief Product Officer at Crobox*

Nike, Adidas, Patagonia, and North Face have all leaked into mainstream, hip, fashion culture. Individuals will buy activewear from these brands to signal to others they can afford to do so. Wearing these brands signals belonging to an in-group of wealthy people. Wealthy here equating to both economic and health wealth.

This relies on the principles of Conspicuous Consumption. Based on the theories of Thorstein Veblen who coined the term in his book *The Theory of the Leisure Class* (1899), Conspicuous Consumption covers Costly Signaling and Veblen goods. So-called Veblen goods are products that are purchased based on how they outwardly display the consumer's social status.



Source: Adidas

# INFLUENCER PSYCHOLOGY

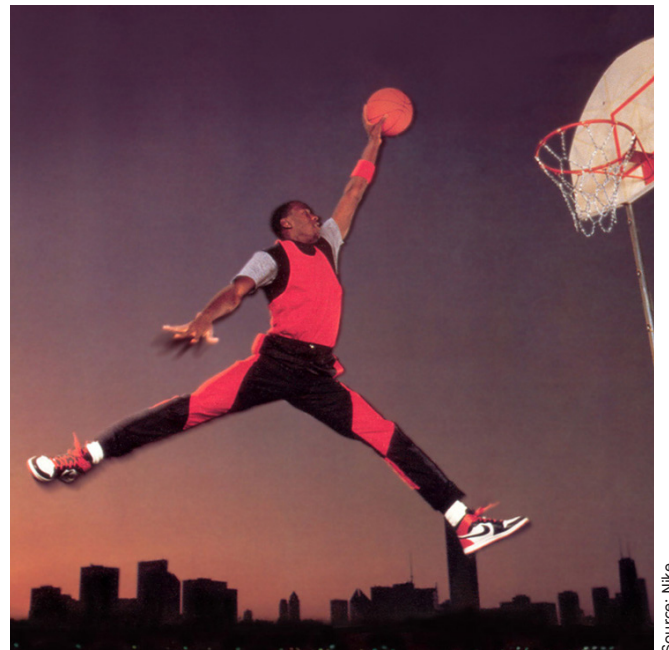
Influencer psychology is how our modern-day influencers have the power to move trends and inspire purchase decisions.

This psychology is at the same time a question of:

- Social Proof (often leveraging social media to spread awareness)
- Authority (those with the authority to influence the way people think)

Influencers are people who have desirable qualities that others are likely to follow, and these characteristics are carefully curated on social platforms to encourage following, liking, and sharing. For rising activewear brands, influencers have been crucial for promoting products.

## Example: Michael Jordan's Air Jordan



Source: Nike

In 1973, Walt 'Clyde' Frazier was the first NBA player to sign his Puma sneakers. In the same decade, marketing in the NBA shifted from pure sports watching to pure entertainment. Athletes suddenly had celebrity appeal.

By the time Nike recruited Michael Jordan to wear his now-legacy brand of black and red, Jordan was already the best basketball player of all time.

The Air Jordan's were against the NBA's uniform rules, and legend has it that Jordan was fined \$5,000 for wearing them every time he came on court. Of course, controversy makes for good marketing, and Nike were not only

rumored to pay the fines but actually created a whole campaign around Jordan's sneakers called 'Banned'.

This instilled the celebrity appeal of Michael Jordan, and therein Nike sneakers. Psychologically, they became as associated with counter-culture as they were with athletic superiority.

For the activewear market, influencer psychology represents an opportunity for athletes to be the ultimate influencer. It's now just as socially acceptable to wear Nike to work, at a club, or at home and working out – and we have, in part, Michael Jordan to thank for that.

# CONSUMER BEHAVIOR & ACTIVEWEAR EXPLAINED USING TWO THEORIES

1

## Lululemon leggings as a Veblen Good

To recap, a Veblen Good is a product that is more demanded if the price of the product increases, and can signal to others the consumer's social status. It's a great example of how the irrational consumer shops, leveraging cognitive biases to pursue more hedonic (rather than rational or utilitarian) purchases.

Veblen Goods are also used to explain the psychology of luxury shoppers, who prefer exclusive and expensive products because of their price point. On a rational level, more expensive products are often assumed to be of better quality. The same psychological theory can be to blame for some activewear products.

Take Lululemon leggings. While their quality is indeed a justifiable USP, there are many similar materials on the market. But owning a Lululemon will make you signal your belonging to the 'in-

group' of Western yoga practitioners.

According to The Atlantic, "the modern fixation on healthy appearance has made yoga pants an effective vector for 'conspicuous consumption'". For instance, Lululemon's logo is strategically placed in a way that caters to other yoga onlookers.

In this way, activewear becomes a way for connoisseurs to point out to other connoisseurs that they are in the know, keeping up with the Johnson's, part of the in-group, or however psychological theory chooses to call it.

In short, it's a vehicle to express belonging. This behavior explains why activewear has become such a hit. It's not purely functional anymore. It becomes a part of fashion's way to express the self. And to reach a higher self – someone who is fit, healthy, and can afford to workout.

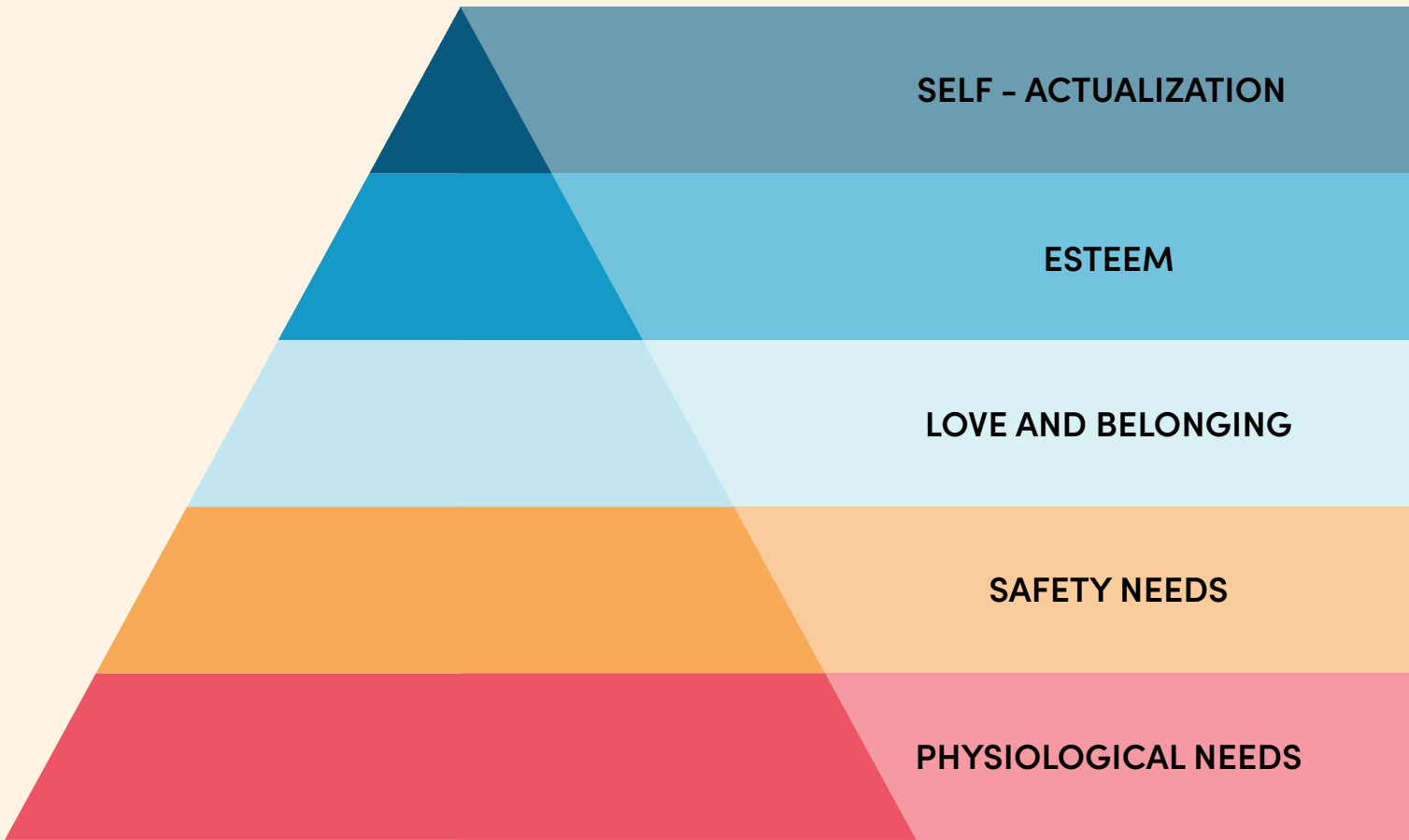


Source: Lululemon



## 2

## Maslow's Hierarchy of Needs



**T**his brings us to the next theory behind activewear. According to Maslow's hierarchy of needs, belonging and acceptance are deeply ingrained in our social needs. But you can't focus on these deep needs without first having a foundation that encompasses things like safety, employment, resources, etc.

This explains how activewear is for the wealthy and accounts for the other behaviors around its

consumption like signaling. The same accounts for how the hierarchy of a consumer's needs develops.

To be fit, you first need to be healthy. To be outdoorsy, you need to care about the planet. In this way, activewear (because it reaches the top of the pyramid when it comes to Maslow's Hierarchy) becomes symbolic of self-actualization.

# CHAPTER THREE: ACTIVEWEAR TRENDS

Top trends inspiring the rise of the activewear market

## Performance

Comfort  
Technological textile  
Trademark attributes



## Inclusion

- Cultural diversity
- Female empowerment
- Non-binary
- Plus-sized sizings
- The disabled
- The older population



## Sustainability

- Transparent supply chains
- Durability of materials
- Reducing textile waste
- Recycled and resell fashion



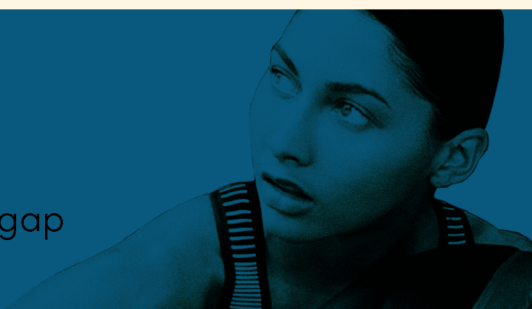
## Athleisure

- Yoga
- Loungewear
- Hybrid gear



## Digital Innovation

- 3D
- AI and IoT
- Social commerce
- Bridging the bricks-to-clicks gap





# INCLUSION



Source: Nike\Hart + Leshkina

**A**nother activewear trend taking shape (all shapes) is that of inclusion, which directly correlates with the increase in female participation in sports globally.

In 1967, Katherine Switzer made history by circumventing the ban on women participating in the Boston Marathon. Today, 76% of women who participate in sporting activities at school have a chance of remaining interested in sport for the rest of their lives.

In 2019, 33% of the Olympic committee members were women. But on the other side of the coin, Serena Williams is the only woman on the Forbes list of the top 100 highest-paid athletes of all time.

While there is still a long way to go to close the gender pay gap and for women everywhere to ‘break the glass ceiling’, inclusion and participation are trends that many activewear brands are either taking a stance on or remarketing their whole brand towards.

**This trend also includes (as the name suggests) empowering:**

- Cultural diversity
- Non-binary genders
- Plus-sized sizings (Target has launched an entire line of athletic wear that runs from XS-4X for women and S-3X for men),
- The disabled
- The older population (as health consciousness takes precedence for the young, so too are the older population connecting activewear to a more healthy lifestyle). According to Vogue, “the hope [for activewear brands] is to appeal to an older generation by offering looser styles that can be a middle ground between gym clothes and business wear.”

# SUSTAINABILITY

Activewear and love for the environment go hand-in-hand (as we've seen with Maslov's Hierarchy). Outdoor apparel especially has its roots in narratives for environmental protection.

For women, style and comfort are important. For both men and women, durability is a driver. According to Crobox data, 5.47% of people who saw sustainability messaging on a sneaker marketplace webshop were more likely to buy (compared to 1.72% of people who didn't see sustainability messaging).

Patagonia has had a singular purpose when it comes to selling their clothing and their marketing is based on green activism. For example, they sued Donald Trump in order to protect agricultural land (the former president wanted to open up public lands for drilling and mining).

And their Don't Buy This Jacket campaign took a hard look at the environmental impact of Black Friday. Many other sustainable brands boycotted Black Friday in 2021: Nudie Jeans, Veja, Alohas, Everlane, REI, and Cuyana.



Source: Nike\Hart + Leshkina



## Sustainability for activewear means:

- Having a transparent supply chain that promotes sustainability across all touch-points
- Brands should help consumers lower their carbon footprint
- Brands should offer durable products
- Products with little to no textile waste and recyclable fabrics

That activewear apparel and footwear are made from sustainable materials is one aspect of the trend. But where 'greenwashing' is an underlying shadow to this, it's the brands that follow through and engage authentically in sustainable behavior that come out on top.

## ATHLEISURE

As much as athleisure started off as a category of activewear, it has now gripped the market so much that it's become a trend unto itself. InStyle suggests that 'the norm has become dressing to feel your best, with an extra emphasis on comfort.'

We'll explore how athleisure works to both contribute and disrupt the activewear market later on. What's important to keep in mind is that this trend shows the important and desirable crossover between sportswear and leisurewear.

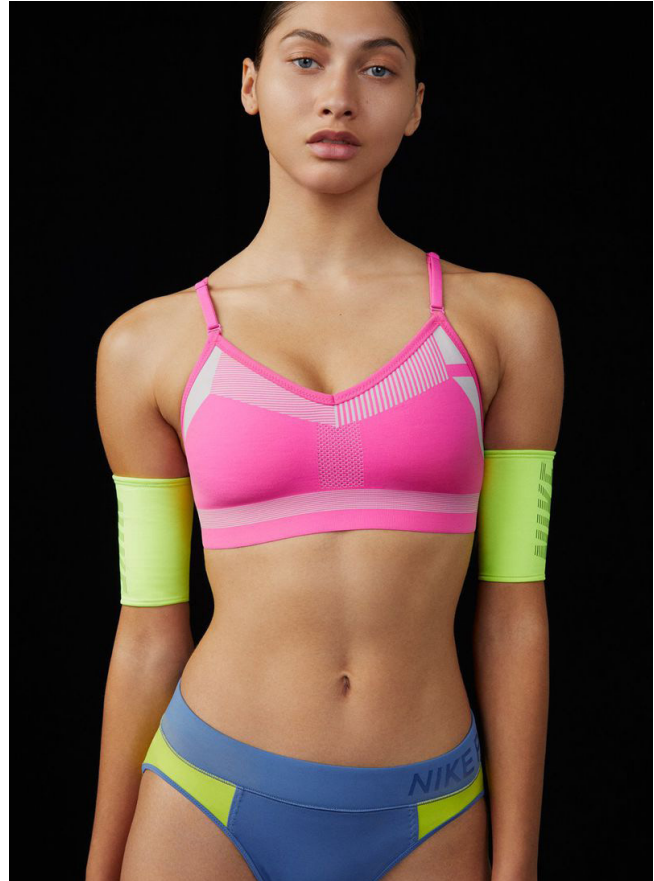
Popularized by Lululemon, athleisure became popular when the New York fashion industry used the word to advertise comfortable and functional apparel. This, coupled with apparel at a lower cost, became known as athleisure. Today, athleisure is an unparalleled phenomenon when it comes to sports fashion, and something we'll analyze in-depth later on.

## DIGITAL INNOVATION

While textile technology is still revolutionizing activewear from the fabrics used to how it looks and feels on the skin, the market is also becoming dominated by manufacturing and merchandising going digital. Look-and-feel (for eCommerce and social) is still a top priority for design innovators – if they can convey this in a digital universe.

Instead, the question for activewear brands – and many other brands across verticals, for that matter – is how to sell products online without the haptics present in-store (i.e., touch, smell, try-on).

For example, 3D running shoes take personalization to the next level. Smart clothes integrate tech into clothing to optimize sports and performance. AI is using algorithms to automate the right kinds of collections for the customer while hyper-personalizing the products a shopper sees.

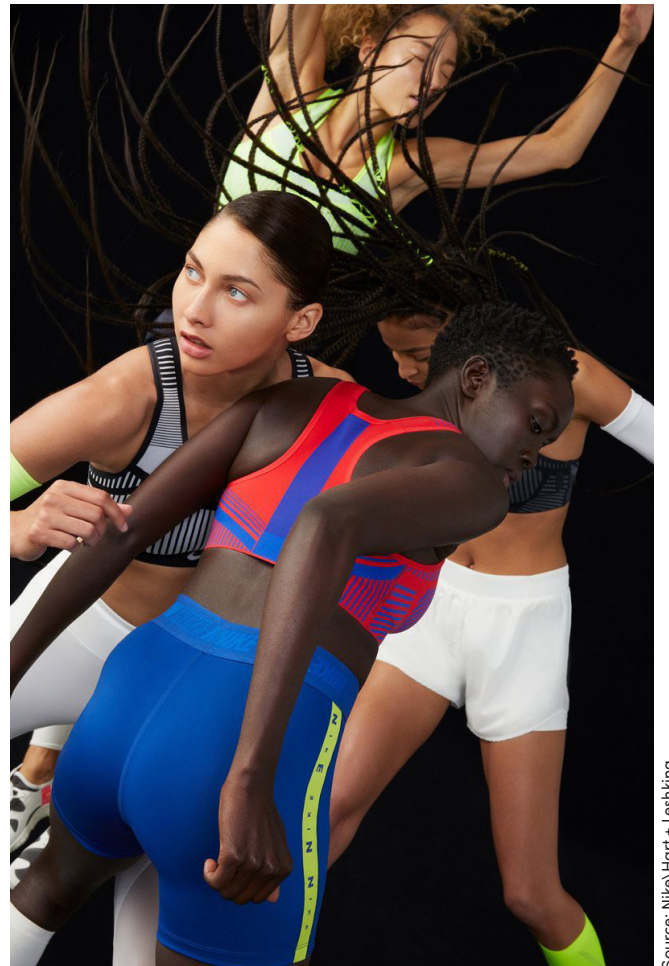


Source: Nike\Hart + Leshkina

Nike's Digital Sport division (launched in 2010) is dedicated solely to fostering digitization by providing skilled resources and coordination across digital channels. As a result, Nike's Instagram interactions have been increasing 150% year over year, showing that digital innovation isn't just about leveraging sexy technologies like AI or IoT but reinvesting in the channels that do work.

The North Face, for instance, rules mobile shopping with enhanced buy-online-pick-up-in-store strategies and digital loyalty programs. Vans' robust product merchandising affords it 6th place in Gartner's 2019 report on top 10 activewear brands in digital.

Market professionals agree that digital innovation starts with making pre-existing channels like social and eCommerce robust. Brands that succeed in capturing shopper attention here can then turn to innovative technologies.



Source: Nike/Hart + Leshkina

# CHAPTER FOUR: ACTIVWEAR CATEGORY ANALYSIS

Top trending activewear categories:

Outdoor apparel



Athletic footwear  
(running, sneakers)



Athleisure





# OUTDOOR APPAREL

**DEFINITION:** Outdoor apparel consists of performance-enhancing clothing and footwear for activities that can only be practiced outdoors. Sports and activities such as fishing, hiking, rock climbing, sailing, kayaking, cycling, surfing, etc. This usually encompasses outdoor ‘gear’ including (but not limited to) coats, jackets, fleece, sweatshirts, rain pants, etc.

According to the UK Environment Agency, the average UK person plans to spend fourteen hours outdoors during a typical week over the summer. Emerging activities that are of growing interest include bird-watching, gardening, and fishing.

In the US, 48% of the population participates regularly in outdoor activities. In data gathered on one of our outdoor apparel brands, we found that men are more likely to shop for skiing and snowboarding apparel, with everyday outdoor taking a backseat (although this could be seasonal).

Women, on the other hand, chose trekking before skiing and snowboarding. In the US, hiking in 2020 was up 171% compared to the previous year. It’s clear that across demographic segments, more people are engaging in outdoor sports.

While outdoor activities became more of a norm during the COVID-19 pandemic, more people are also choosing active holidays. Making the impulse for purchasing outdoor apparel twofold:

- I want to get gear appropriate for outdoor activities
- I want to participate more in outdoor activities

Statista forecasts the outdoor activewear market to be a \$19 billion industry by 2026. Top brands include Arc’teryx, North Face, Patagonia, Marmot, and Columbia Sportswear. Popular brands are a mix between legacy (Columbia) and DTC (Arc’teryx).

Legacy brands that have often operated within a niche can now sell selective gear to the average consumer. These brands are predictably driving the compound annual growth rate (CAGR) of the outdoor apparel industry by 4.6% between 2022 to 2028.

These past years, the market also had a spotlight on winter sports. The Fall Winter 21 runway show focused on puffer jackets, knitted balaclavas, and apres-ski loungewear. Chanel featured salopettes inspired by winter sports.



Source: Nike

## Gorpcore

One of the most popular activewear brands of the season, Arc'teryx is considered by High Snobeity as 'the sleekest gear on the market, the Range Rover of techwear. Stylish, expensive, and beastly at the core.'

Outdoor apparel is dismembered from its dad-gear perception. In other words, it's no longer clunky but chic. Chic outdoor gear is dubbed 'Gorpcore', inspired by the name for trail mix when hiking ('Good Ol' Raisins And Peanuts'). According to Grailed, Gorpcore is camping-chic and focuses on wearing utilitarian, functional, outdoor gear every day.

To chart the success of this trend, even non-outdoor brands feature outdoor themes in their campaigns. Urban Outfitters sent a camping-themed email showcasing a breadth of products like sandals and trail shorts. Free People has a dedicated Camp Shop page offering outdoor essentials.

Bucket hats have seen a 51% increase in searches on eBay and 16.4% of the American population have been fishing more than once. But, as the gorpcore trend validates, consumers don't buy activewear products to suit their outdoor activity needs. The strange popularity of bucket hats is a good example of this.

Karl Lagerfeld brought the bucket hat to the runway in 2018, once again deconstructing the boundaries between high-fashion and activewear. Or, in other words, bringing gorpcore to the forefront of the activewear industry.



For one of our activewear customers, we tested a Product Finder to understand more about outdoor apparel shoppers. 68% of users were looking for technical outdoor gear, 21% of users were looking for outdoor apparel only for everyday use, and only 11% were looking for technical gear that can be used every day. This disproves the Gorpcore hypothesis but is easy to explain. People using a Product Finder on an outdoor apparel webshop will be more goal-oriented and therefore look for technical products. The attribute 'waterproof' was 4x more chosen than 'windproof'. On the whole, our data found that the majority of Product Finder users were making choices based on technical outdoor activities; i.e., mountaineering, trekking, and skiing.



Source: Nike

## Most important factors for purchasing decisions: Outdoor apparel

1. **Breathability and comfort:** The waterproof breathable textiles market is projected to reach \$2.3 billion by 2027, growing at a CAGR of 4.4% over seven years. Consumers want comfort when they shop and wear outdoor gear, especially as the top three outdoor activities that are popular in the market at the moment (running, fishing, hiking) require specific, comfortable gear.
2. **Middleground between functional and fashionable:** According to Edited, brands should 'pair seasonal color palettes and silhouettes with high-performance materials and products' (including products like swimwear). In 2019, Carhartt generated over \$1 billion in revenue, the ultimate cross between functional clothing and fashion (their cargo pants have multiple pockets made for multi-environment durability).
3. **Nature as the foundation:** Patagonia has long been popular with outdoor aficionados. Their mission has always been solid: Protect the planet at all costs. It's so political that it's almost in your face – but it works. Patagonia holds 30% of the share of outerwear products compared to other outdoor apparel brands. Unlike other activewear brands, they place outerwear as a top priority, with green activism at the core of their marketing.



Source: Nike

# ATHLETIC FOOTWEAR

DEFINITION: Athletic footwear is shoes designed to be worn for sports, exercising, or recreational activities. In our definition of athletic footwear we include:

- Running shoes
- Sneakers

A running shoe is a high-tech sneaker designed specifically for running and usually leverages lightweight and cushioning features in the foot and heel to promote forward movement. Sneakers are trainers that can be worn for sports OR casual occasions.



## Running shoes

*“Running shoes are constantly evolving. And thanks to the continual ebb and flow of creative innovations, bizarre fads, and leaps in science and our understanding of the human body, they will continue to do so as long as humans are lacing up shoes and running for competition and recreation.”*

*Brian Metzler, Kicksology*

According to Kicksology, there are six patents that changed the running shoe design:

- Bill Bowerman’s Waffle Outsole
- Air-Sole cushioning system (evolution of Air Max)
- Stabilizing midsole design
- Barry bates promotion plus (Barry Bates designed and patented shoes for ASICS in 1980 with midsole inserts)
- Decoupled outsoles
- Articulated toes by Vibram FiveFingers

Running shoes are predicted to have a CAGR of 4.85% between 2022–2025. The top brands within this vertical are Nike (valued at over \$36 billion), Adidas (\$16 billion), Puma, Under Armour, Reebok, New Balance, Skechers, and ASICS.

In 2021, Puma launched five new lines of running products including Liberate, Velocity, Deviate, Deviate Elite, and Eternity to jump on the running shoe trend in full force.

From the 1990s and beyond, the trail running market also saw unprecedented growth. In 2019, the American Trail Running Association found that 83% of runners actually used trail-specific shoes. This supports the rise of the outdoor apparel market: More people are not just running, but running outdoors and over extreme natural terrains.

We validated this by running experiments with one of the top running shoe retailers on the market. Together with the UX-research company Brangineers, we spotted the interest in ‘trail running’ on ASICS’ webshop.

Brangineers tested ASICS Running Shoe Finder using eye-tracking and EEG scanning. They found that many users were missing a trail running option. ASICS then optimized their Running Shoe Finder by including an option for trail runners.

**Read more about this case study here.**

Female participation in running has also impacted the trail running shoe market. From 2014–2017, female participation in running increased from 22% to 34%. For one of our running shoe brands, we found that more men were buying single running shoe products, but women were spending more per transaction.

According to balanced running, women would spend on average \$1,100 on running gear, whereas men would spend around \$900, once again validating our own data. Perhaps because women have historically been left out of the running shoe market means there is more thought required before buying a running shoe.

In further data we collected on one of our running shoe brands, we found that more men were completing a Running Shoe Finder than women (58% vs. 38%). Men were also more likely to look for running shoes to run on the road, instead of on trail or track.

For another running shoe brand, we found that men completed the Shoe Finder more than women (drop-offs for women 85% vs. 88% for men). It’s possible these running shoe brands don’t capture the attention of women enough. If more women are choosing trail or track options, running shoe brands should have categories that respond to this.

In general, women are also more risk-averse than men. This will instill the need for a type of running shoe (especially for trail running) that is easy to run with, and grips well over dirt, mud, gravel, and roots to minimize foot injuries. Having a running shoe finder that is information-driven, and explains these features well will capture attention and drive behavior better for both segments.

*“Most companies focus on running faster, sweating harder, being a beast. ASICS flips that around to help the shopper with every movement they make. We believe it’s about clearing your mind and training your body. Hence, ASICS stands for anima sana in corpore sano; ‘healthy soul in a healthy body.’”*

*- Rick Hoving, Senior eCommerce Manager at ASICS*

## Sneakers

The sneaker isn't strictly an activewear product anymore, not in the same way that running shoes are. But like the tennis polo, sneakers start off as activewear and go on to represent a cultural zeitgeist. And consumers opt for wearing sneakers not to participate in sports, but to signal to others. Making it an important emerging category that deserves attention.

By 2026, sneakers will account for a \$120 billion market. 62% of respondents in a Hypbeast survey chose footwear as their most bought streetwear market. Rare sneakers have recently become a global commodity according to The Times, with GenZ consumers making them an 'asset of choice'.

72% of luxury brands report sneakers as their best-selling product globally. When Air Jordan's took off in 1985, their sale showed just how popular meshing athletic footwear with leisure could be. Today, the appeal of sneakers is largely due to the rising trend of comfort. But rebellion, counter-culture, and individual expression aren't far behind.

Famous sneaker-celebrity collabs like Yeezy's (Adidas x Kanye) are priced anywhere from \$200 to \$600. The Yeezy model 350 ranks second behind the Air Jordan for iconic shoes. Their popularity symbolizes the sneaker market as a whole; ingrained in hip-hop culture, Yeezy disrupts traditional luxury while still cultivating scarcity.

In 2020, sales of Yeezy slides grew by 400%. The sneaker represents the power of marketing to a subculture, and how this can transform into solidifying a brand's legacy.

*"There is a pop-culture currency [to] footwear. For sneakerheads, there is a style of trainer for every taste and identity."*

- BBC

According to research by Lux and Bug, 'there is a complementary relationship between sneaker brands and the resale market; that product limitation is essential for value increases; that collaborations are necessary for sneaker brands to be relevant on the resale market and that the market is very fragmented.'

Consumers wear sneakers to carry out conspicuous consumption (i.e., signaling to the 'in-group' their wealth and social status). This has transformed sneakers into a Veblen Good, where the more the price goes up so too does the value. In fact, there was a drop in interest in Yeezy's back in 2019 when they increased supply.

According to Glossy, 'for a segment of [Yeezy's] core customers, the fact that the shoes weren't common was a selling point.' Collaborations between luxury brands and sneakers also drive demand in this market. StockX showed a 200% increase in collaborations between luxury and streetwear brands from 2019 to 2021.

In the resale market, sneakers are legendary. Scarcity drives up their value, with resale marketplaces like StockX, which generated \$400 million in revenue in 2020.

StockX's total revenue can be attributed to:

- Adidas (46%)
- Air Jordan (28%)
- Nike (24%)

Limited edition sneakers are a conversation starter for sneakerheads within this community. Lux and Bug's findings indicated that product authenticity in the sneaker resale market is key. Counterfeit sneakers saturate the market. But buyers will not spend on a sneaker unless they feel absolutely certain about their authenticity.



Crobox data showed that men spent 89.18% more than women in a sneaker marketplace over the course of a year. What this represents is a dramatic misrepresentation of women in this market. Although men spend on average 5.7 hours in sports activities per day (compared to 4.9 hours for women), our data actually shows that women are spending more on athletic footwear in general. Footwear brands should cater to this segment with as much care they do for others.

## 'Sneakerheads' is not gendered

There is a male-dominated perception of sneaker-wearing in the 21st century. Women are often sidelined in the sneaker market from sizing to pricing. For example, the Stussy x Air Zoom Spiridon 'Fossil' is listed on Goat for men at \$465, while a women's size resells for \$1,105.

This is only recently starting to change, especially as female celebrities are jumping on the collab-trend (Cardi B x Reebok, PUMA x FENTY).

*"As the fashion industry blurs the lines of what is perceived as feminine and masculine, naturally we are seeing gender neutrality take over. As the industry moves forward the sneaker industry seems to sadly stay the same. Women don't want another pink platform sneaker, they want to see the most coveted high-heat releases dropped in an inclusive size range without the inflated price point."*

- Klekt

### Most important factors for purchasing decisions: Athletic footwear

- 1. Guided selling:** Running, and other sport-specific shoes, require a pretty technical knowledge foundation to buy. Many running shoe brands will recruit the help of in-store experts to guide the sale. Online, guided selling can look very similar using the help of Product Finders or Virtual Assistants. But this can also look like product recommenders or comparisons. Especially for more technical activewear products, guided selling is important to facilitate and drive purchase decisions.
- 2. Direct-to-consumer (DTC):** Nike and Adidas are starting to obliterate their wholesale partnerships and focus on their DTC channels. The 25 fastest-growing DTC footwear sites saw a 64% bump in total traffic in Q3 of 2021 compared to the year before. Prioritizing a DTC approach will mean reinvesting into the brand's ecosystem, and personalizing the experience from there. This is something that will benefit both running shoe and sneaker brands. For DTC to succeed in the resale market, brands are beginning to leverage peer-to-peer resale, which will empower customers and give back autonomy at the shopper's end of the funnel.
- 3. Cultural significance:** Athletic footwear becomes valuable fashion items when it can tell a story or be worn by celebrities. This cements them in the cultural zeitgeist (e.g., Forrest Gump wearing Nike's waffle trainer or Seu Jorgen wearing white and yellow Adidas in Wes Anderson's film). According to Lux and Bug, "in order to be relevant for the secondary market, a shoe needs to possess a quality or meaning exceeding its functional values." The limited-edition or exclusive nature of sneakers is part of the success of storytelling. For running shoes, this story should be integrated into how the product will benefit the life of the consumer.
- 4. Representation:** Athletic footwear has long been dominated by masculine-targeted marketing. But the majority of consumers require more representation. Female sneakerheads are severely held back from being educated by the market. More inclusive content will drive purchase decisions. If women are spending more on running shoes and gear (as validated by Crobox data), then this is an opportune segment to capture, nurture, and retain. According to Edited, the global women's activewear market is forecasted to grow by \$37 billion in the next four years.

# ATHLEISURE

**DEFINITION:** Athleisure refers to clothing that is a hybrid between athletic gear and leisure. This style of clothing is both comfortable and aesthetically appealing, which can also be used for other activities and sports while at the same time being fashionable enough to be worn every day.

Since the start of the pandemic, athleisure sales jumped 84%. While comfort during lockdown days became the most important thing for individuals, the ease to go from lounge-wear to workout also helped propel this category forward. The market is expected to expand at a CAGR of 8.9% from 2022-2030.

## Yoga leggings

*“Lululemon has sparked a global fashion revolution, sometimes called athleisure or activewear which has injected prodigious quantities of spandex into modern dress and blurred the lines between yoga-and-spin-class attire and normal street clothes.”*

- The Atlantic

Yoga pants are generally made from a blend of cotton, nylon, wool, lycra spandex, and polyester, with more innovative textile technologies on the market making consumers interested in buying from the best. The year-round textile versatility of yoga leggings coupled with their underlying comfort makes yoga pants the top trending athleisure category worldwide.

Although this trend parallels the rise and popularity of yoga worldwide, it decries an activewear product responsible for the behavior towards comfort over performance. Under Armour’s marketing campaign during the pandemic reasserted the ‘performance’ of their products. Rather than focus on athleisure, Under Armour’s positioning actually cost them.

Yoga pant sales, for example, have increased 55% YoY according to research by Edited. In 2022, the top athleisure brands are still Lululemon, Adidas, Athleta, Gymshark, and Vuori. But even non-activewear brands are now launching their own athleisure lines, including Misguided, H&M, and luxury brands like Max Mara, Filippa K, or Redemption.

The product of choice for these brands is the yoga legging – the Veblen good that makes a consumer appear healthy and fit, while at the same time (and in some cases) driving the intrinsic motivation to workout. The yoga apparel segment held the second-largest revenue share for athleisure in 2021.

On the other hand, Gilly Hicks, A&F’s women’s loungewear brand, saw double-digit sales growth in Q4 2020, which led to a 100% increase in online sales.

In the US, there are 85% more yoga products in stock year-to-year at activewear brands. But these yoga leggings are not just for yoga – just as athleisure breaks boundaries between everyday wear and sports gear: Searches for ‘leggings with pockets’ were up 180% over three months in 2021, while searches for ‘zip leggings’ rose by 76% over a year (f-trend).

The impulse behind yoga leggings is that they are year-round, versatile, and one of the easiest products that bridge the gap between athletics and leisure (probably because the sport itself is as low-barrier as it gets).





## Most important factors for purchasing decisions: Athleisure

- 1. Athleisure communities:** Many athleisure brands intersect their commerce and content strategies. Alo Yoga, for example, is both a yoga platform and activewear brand and it's rare that people talk about Alo without one or the other. Hayo'u has a holistic approach to wellness, intersecting Chinese medicine, beauty, and athleisure. Communities here are important to place holistic wellbeing and health at the forefront of a DTC strategy.
- 2. Second-skin-feel:** We've seen how yoga leggings take the comfort game to whole new levels. But for any other athleisure product, this USP is paramount. A 'second-skin-feel' is what makes comfortable activewear also suitable for lounging. Brands should push authentic attribute messaging that encapsulates just how comfortable their products are – whether they feel like second-skin or have innovative design tech-specific for snugness, support, or a feeling of security.
- 3. Female empowerment:** Like many active-wear verticals, the inclusion of women in the athleisure movement also helps drive purchase behavior and customer loyalty. Sports bras are sold without seams to drive comfort for women alone (a huge trend according to research by Edited. 53% of sports bras at boohoo are described as seam-free). This is such an opportune segment that brands are starting to sell yoga wear specifically to women. Name a more niche segment that does so well. We'll wait. In 2020, women accounted for 69% of Lululemon's sales.
- 4. Natural materials:** While flexible and comfortable materials take precedence, many consumers are attracted to sustainable and durable materials. Yoga leggings with recycled fabrics, bamboo leggings, and leggings made from virgin synthetics, are keywords that are trending for athleisure buyers.



# CHAPTER FIVE: THE FUTURE OF ACTIVEWEAR

What many of these categories show is that these are trends that will only continue to grow. Outdoor apparel is based on a foundation of respect and appreciation for nature. Running shoes and sneakers demonstrate the consumers' desire to fit in and practice low-barrier sports. And athleisure makes comfort and wellness come out on top – again.

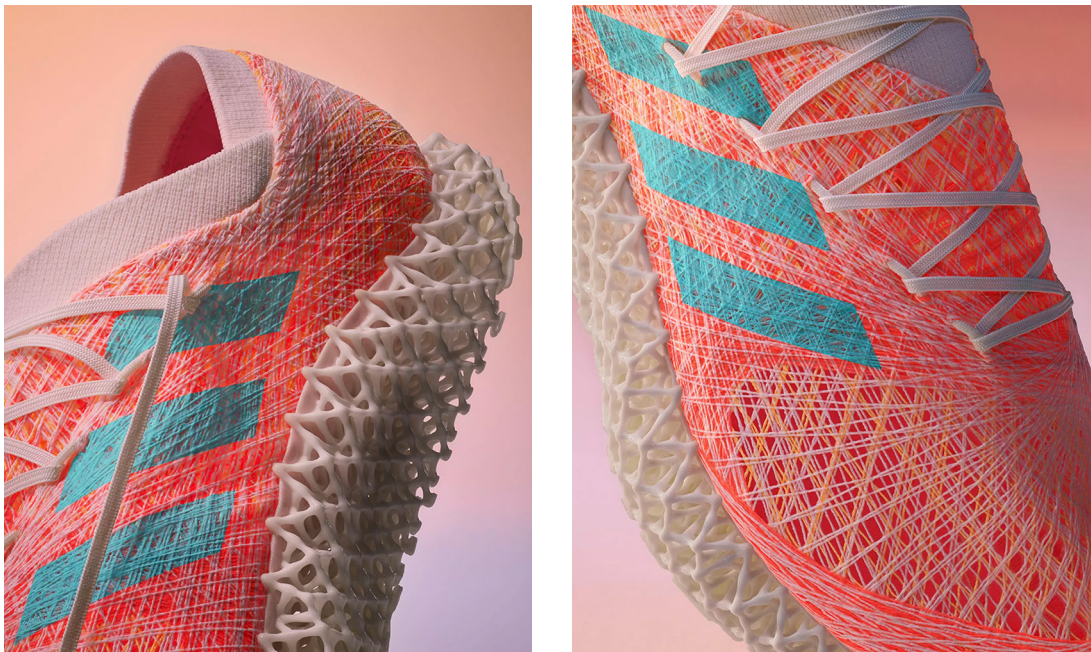
Along with this are inclusion and diversity which will become paramount clauses for any brand in activewear and beyond. Authentic efforts to make sustainability happen will be acknowledged. Supply chains will continue to be reinvented to accommodate less textile waste and more transparency. Going local with materials and craftsmanship will be as much part of the manufacturing process as it will be the brand's narrative.

Green activism or socio-political engagement will be a must-have for activewear brands, as

long as consumers continue to choose brands that reflect their values.

Furthermore, performance-enhancing gear will take over the market in subtler ways. Tech-wear (e.g., smart clothing that tracks health indicators) will dominate active performance, as long as these products stay within the confines of 'fashionable' for the everyday consumer (think of the minimalism and simplicity of wearable sports tech, like the FitBit).

Those active shoppers belonging to the 'in-group' will continue to buy activewear for its cutting-edge attributes, specific to their sport of choice. New product launches, partnerships, and design innovation will help activewear brands expand into new markets. Celebrity endorsements will be replaced by community commerce and localized influencers on platforms like Instagram and TikTok.



The Adidas FUTURECRAFT.STRUNG is a shoe that will be available using a recyclable 4D printing midsole. The shoe uses only one material knitted with 1000 threads, limiting production waste.



Source: Nike

# CONCLUSION

**D**o you want to understand more about your activewear categories? Or maybe you're an activewear brand looking for insights on a product level.

At Crobox, we collect and analyze millions of product data points in a GDPR-compliant way, keeping the end customer's data protected. Some of our clients include outdoor apparel leaders, running shoe retailers, and activewear marketplaces.

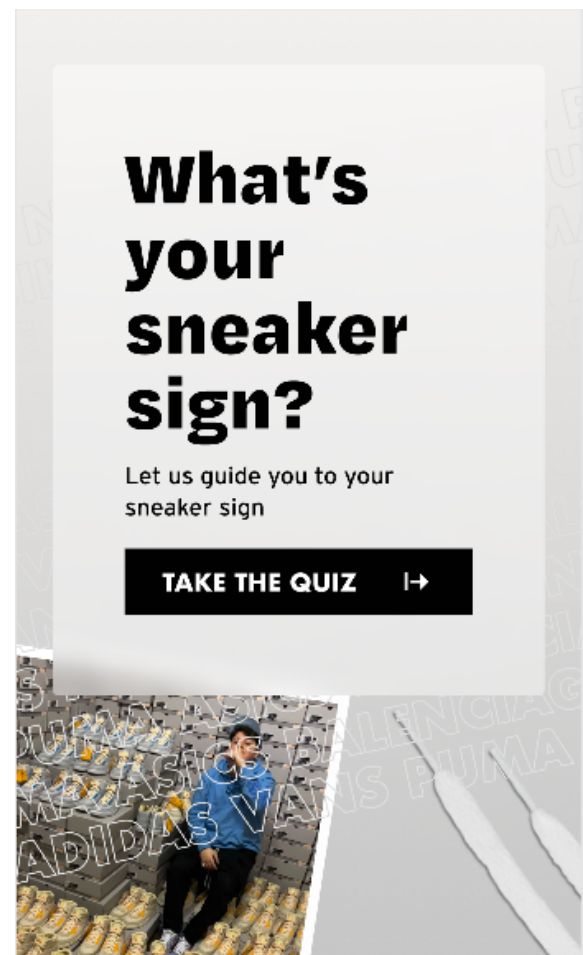
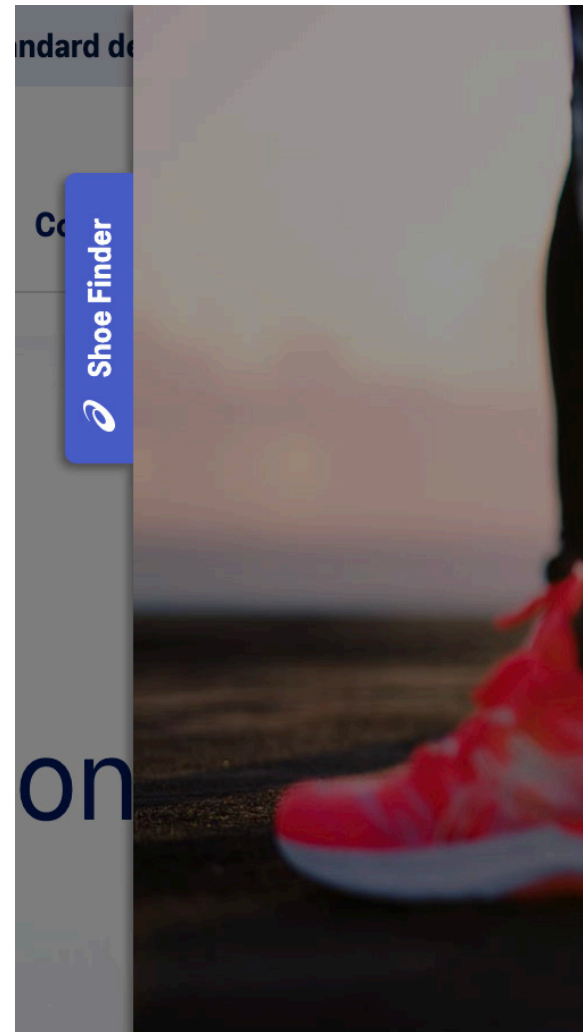
We also help other brands like home and apparel and bra and underwear. Our goal is to provide brands with data-driven decisions and unique insights into consumer behavior.

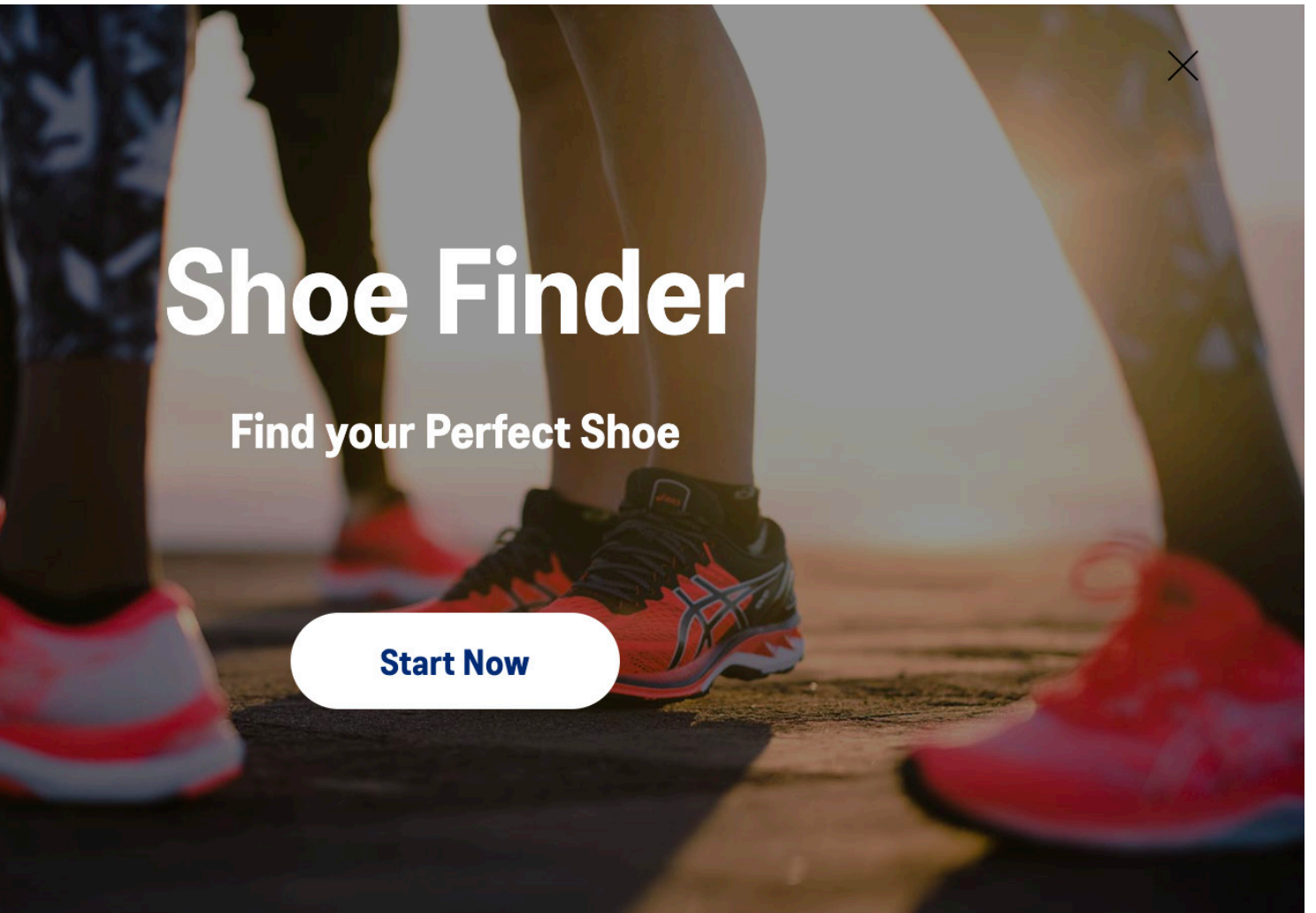
We do this by facilitating product discovery journeys on your webshop, and then collecting that data in one place so retailers can understand their audiences a bit better and drive discovery behavior on their webshops and in-stores.

**For more on how our product discovery platform works, feel free to plan a demo.**

To understand how we curated the research in this report, contact us! Or, if you're interested in a report about your own industry, let us know. Our goal is to create content that will help your brand do better while delighting your shoppers along the way.

**PLAN A DEMO**





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- Old school hip-hop
- Trap
- Top 100 charts
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YOUR SNEAKERHEAD

### OLD SCHOOL SNEAKERHEAD

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WEAKNESS: FASHION

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