



Beyond the Game: The Transformation of Women's Sportswear

August 2024

EXECUTIVE SUMMARY

Why read this report?

INTRODUCTION

Key findings

Women's sportswear outperforms men's, driven by heightened interest in women's sports

IGNITED INTEREST: THE RISE OF WOMEN'S SPORTS

Increased advocacy for gender equality reaches the sports world

2023 FIFA World Cup success reflects the growing popularity of women's football

Record attendance in basketball boosted by rising stars and record-breaking performances

Paris 2024 Olympic Games expected to further increase fan interest in women's sports

Brands, big and small, eager to capitalise on women's sports boom

GAINING GROUND: WOMEN'S SPORTSWEAR OUTPERFORMS MEN'S

Growing interest moves to off the court, but gap still exists

Women's sports footwear outperforms sports apparel over the historic period

Men's products still concentrate majority of sales of leading sportswear brands

Can e-commerce facilitate access to a wider offering of women products?

Women's sportswear gains ground in Latin America boosted by wellness trends

Sports brands capitalise on the increasing popularity of football in Europe

A changing message, wellness trends and domestic brands boost sales in Asia Pacific

Renewed attitudes towards exercising favour growth in the Middle East and Africa

CLOSING THE GAP: DIVERSE PATHS TOWARDS A COMMON GOAL

Brands can take diverse paths to tap into underserved women's sportswear market

Tapping into underserved segments opens new pockets of growth

Women's sportswear requires change through their life cycle, calling innovation around it

Knix diversifies offerings with leakproof selections across life occasions

Sports aficionados, growth opportunities beyond the court

Women's sports boom attracts beauty brands and beyond

Selfridges focuses its summer offering on the " Sportopia " concept

Gender equality remains a pending task in sports science/sports medicine research

Promote women's health through physical activity

Women value brands that advocate for them and are willing to change the message

New Balance partners with the WNBA to grow in women's sports

CONCLUSION

The transformed women's sports segment: Opportunities for growth

Bridging sports gaps: a boost for women's sportswear

Evolution of women's sportswear

The transformation of women's sportswear: Questions we are asking

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