

Cotton and the Athleisure Market

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Abstract

The focus of our research is to examine the athletic wear and athleisure market and evaluate the effectiveness of recent technological advancements within the cotton industry to rise as a top competitor in this market. Through our exploratory research, we would like to grasp a better understanding of what kinds of needs and expectations consumers may have for the products within this market so that we may understand how the cotton industry is addressing these needs. We found out through our research that not many people know about the efforts being made to enhance cotton to be a performance-ready fabric and that fit and comfort are two of the most important factors consumers consider when purchasing athletic wear.

Objectives

- To determine the current role and significance of cotton in the athleisure market and how it can grow in popularity
- To investigate the purchasing process of consumers and grasp a better understanding of their needs and expectations from athleisure apparel
- To evaluate how those needs and expectations are being addressed by recent cotton-focused developments in the athleisure market

Background/Literature

Athleisure is the trend of wearing active wear, clothing designed for fitness and performance, both at the gym and for everyday apparel (Weinswig, 2016). Social media plays a huge role in this upbringing because it allows brands to develop an emotional attachment between the consumer and the clothes. Fitness Instagramers, or influencers, are one of the main reasons for the emotional bond that is created because as they showcase their healthy lifestyles, millions of consumers have begun to adopt the same habits in hopes of following in their footsteps. This results in a boost in demand for the trend. As athleisure continues to grow in popularity at rapid speed, brands of all market segments have incorporated this trend into their fast fashion lines because it is apparent that athleisure will be around for a long time. According to the Cotton Incorporated Lifestyle Monitor™ Survey, more than 60% of Americans claim activewear as their new casual wardrobe, and 90% wear activewear for purposes other than exercise (The Irresistible Athleisure Trend, 2017). With this, consumers are developing fabric preferences without realizing, and cotton is making its way to the bottom of the list. When an experiment was done on a focus group of female activewear consumption, the moderators discovered that the women could tell the difference between brands due to their fabrics used (Dress for fit, 2018). Cotton is now being referred to as an inferior fiber for athletic apparel manufacturing and the demand for high-tech synthetic fibers and materials has increased tremendously, causing cotton sales to fall (Morrison, 2017, para. 3). In recent years, athletic wear has had an average annual growth of 9% which is triple the usual 3% of all other apparel (Sherman, 2014). By 2024, the athletic wear market size is expected to reach \$567 billion, making this market one of the largest in the entire fashion industry (Market Watch, 2018). This rapid growth has developed an uproar for cotton farmers everywhere because the more the market grows, the lower cotton will be on the priority list of fibers. Traditional cotton fibers are more prone to absorb moisture and become saturated, retaining up to 20-40% more moisture than synthetic fibers (TransDRY). Cotton is generally known as being one of the least versatile fibers with its lack in flexibility and wicking capabilities, which is why consumers prefer synthetic materials over natural cotton. It's safe to say that the cotton industry is aware of severity of this issue and they know something must be done. Certain companies have already begun developing unique cotton technology to introduce a new way of viewing cotton in the athleisure market. For example, Cotton INC. has developed TransDRY. Just like a synthetic fabric, TransDRY provides a breathable and moisture wicking effect (Morrison). It is designed to keep you cooler and dry faster and will wash clean of odors (TransDRY). Cotton INC has hope that this new innovation will encourage consumers to consider cotton fabrics with TransDRY in their future purchases. In a research study done by Cotton INC, they found that consumers are most concerned about the comfort of the apparel they wear and the study also revealed that active wear made from synthetic fibers are significantly more likely than cotton to receive complaints about itching, scratching, and chaffing (Winning in the U.S. Activewear Market, 2014). The Doneger Group's Roseanne Morrison stated "women especially are buying athleisure for comfort" (A Matter of Comfort). Because the athleisure trend is growing so rapidly, brands are embracing this new category and are developing true athleisure that is meant for streetwear/loungewear and not for physical exercise which has potential to be an open door for the cotton industry. Athleisure, to put it simply, is a perfect combination of fashion and comfort due to the trendiness and ease it provides. Since cotton is notorious for being comfortable and breathable, consumers are more likely to choose cotton garments when shopping for leisure-specific activewear, so while charged cotton technology is becoming a success, the cotton industry should take into account the idea of athleticwear that isn't meant for performance but more for fashion. CEO and founder of Trendalytics, Karen Moon, explained "Going to the gym — and where you go — is now part of your fashion status, and everything you wear in-between is an opportunity to make a fashion statement," (Athleisure Works a New Angle, 2017). The athleisure category will be around for a long time, some say permanently, so it is vital to the success of cotton farming for these research efforts to continue.

Methods

Content Analysis

- Our body of material is made up of comments collected by searching "charged cotton t-shirts" on a number of websites and reading the reviews left by consumers
- We collected consumer comments from online websites such as Amazon, Under Armour, Nike, Walmart, etc..
- Through a priori coding process we were able to determine categories that allowed us to see what our customer was most interested in when purchasing.
- Our categories include Durability, Style, Comfort, Moisture Management, Price/Perceived Cost, Brand Loyalty, Charged Cotton, Odor, Weatherproof Performance, and other

Survey

- When conducting our survey, we analyzed our research objectives to form 18 questions that would get us closer to our goal
- Our questions ranged from demographic, to shopping patterns, and then knowledge/opinions of cotton in the athleisure market
- We opened the survey for our friends and family to take. We were able to reach 125 survey participants.

Results and Discussion

With our results from analyzing comments, we can conclude that fit is the most important aspect of concern to the consumers and weather resistance and odor are the least of concern. In Graph 1, you can see a detailed break down of our coding from our analysis of comments and reviews with red meaning positive, blue meaning negative and green meaning neutral. When comparing fit and comfort, which is a close second in importance, we can conclude that fit received more negativity than comfort, but it was the most mentioned implying that fit is the upmost concern for the consumer. Therefore, brands and developers are able to use these results to do more research into how to manipulate cotton fabrics into a better fitting fabric. They can do this by going more in depth about the aspects of fit that are most important to the consumer, such as the type of fit, how they want it to fit, and which areas of the garment they want to be tighter or more loose fitting.

In our survey, the most common answer, when asked how they decide what brands to buy from, is brand loyalty as 44.22% and 72.07% said yes when asked if fabric content matters during their purchasing process. This provides analysts with the idea that a possible, more efficient way of improving the quality of cotton in this particular market is to research the materials used for popular brands and apparel, and continue to research ways to manipulate cotton to perform in a more similar way to those pieces that are so desired by consumers.

Education on the topic of cotton in the athleisure market is something to be further researched as well because it is apparent that knowledge on this topic is slim. In Graph 2, you can see that when asked what their preference was on fabric content, 37.84% of the participants chose synthetic, followed by "I don't care" with 31.53% and last was cotton with 30.63%. This is almost an even split, but still shows that cotton in the least desired for the athleisure market. With this, we asked our participants how much they know about the efforts being made to enhance cotton in the athleisure market and 56.76% said none at all. 97.3% of the participants answered either at or below a moderate amount meaning that almost all of them know very little of the topic, yet many of them still claim that they prefer synthetic fibers for their athletic clothing. This is a great piece of information for anyone wishing to continue research on this topic because they can go into details about the most efficient ways to market these advances within the industry.

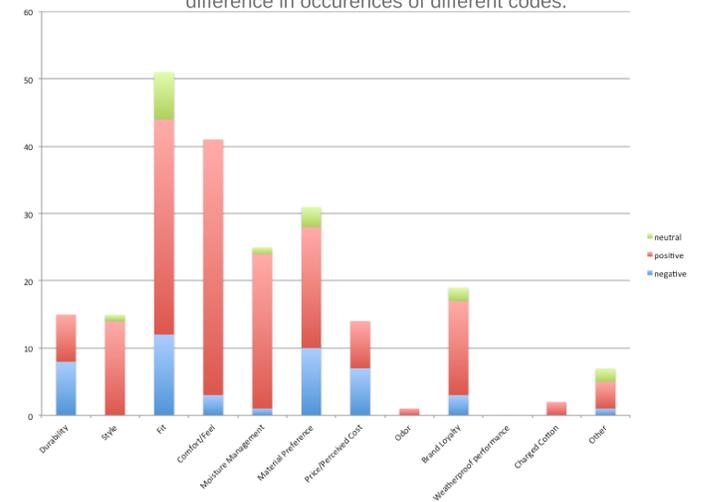
Survey Errors:

Our participants were at an imbalance of demographics. 60% of them are in the age range of 18-24 and the next highest percentage is 17.6% for the 45-54 age group. Females make up 81.6% of the participants. 70.97% are from a suburban area, and 96.8% classify as caucasian. This creates inaccuracy for an analysis of an entire balanced, dynamic population. However, our research is valuable for brands whose target market is the majority of our participants.

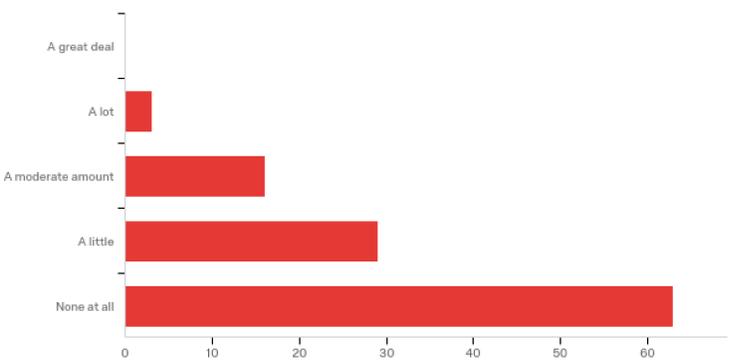
Summary/Conclusions

The results obtained from our research emphasize how important it is for the cotton industry to continue advancements in their fabrics in order to grow. Through our research and survey we are able to see what is important to the consumer. Consumers are concerned about the comfort and fit of their athletic wear and cotton does not come to mind when they go to purchase. It is also important to note that many people do not know much about the efforts being made to introduce new technology to cotton fabrics. I think the more people are informed on the benefits of the TransDRY technology they will be more inclined to purchase athletic wear made of cotton.

This stacked bar chart compares all of the comments in a color coded fashion that neatly depicts the difference in occurrences of different codes.



How much do you know about the efforts being made to enhance cotton to be performance fabric-ready?



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