

# A LIFE THAT MOVES





I work out to  
preserve my sanity.

It's almost like a  
fresh start  
to the day no matter what it is.

IT'S JUST – YOU KNOW,  
I'VE GROWN UP WITH IT.  
AND SO, FOR ME, I CAN'T IMAGINE  
A WAY OF LIFE THAT DIDN'T INCLUDE  
SOME SORT OF ATHLETICS OR A SPORT  
THAT WE REALLY ENJOY.

I WORK OUT BECAUSE  
I FEEL GREAT  
AFTERWARDS.  
IT HELPS  
CLEAR MY HEAD.

RUNNING, IT'S VERY THERAPEUTIC,  
ESPECIALLY IF I'M KIND OF MAD ABOUT SOMETHING OR HAVE  
SOMETHING ON MY MIND

I MOSTLY JUST DON'T WANT TO  
GET FAT

BASKETBALL  
IS THE

IT'S MY OUTLET  
AWAY FROM EVERYTHING.

I play because it makes me

FEEL GOOD

to the point where nothing else matters.

You got to look good playing.

IT GIVES ME SOMETHING  
TO BOND WITH MY DAD OVER  
WHEN I GO HOME

AND IT JUST SEEMED  
HOW YOUR BODY CAN GO SO  
MUCH FURTHER  
THAN YOU THINK

It's more competing  
against myself...  
trying to push myself  
to do something that  
I've never done...

I want girls to play

HIGH SCHOOL SPORTS  
because they can always maintain a  
HEALTHY LIFESTYLE.





# OUR JOURNEY

WHY WE'RE DOING THIS

TRAVEL GUIDES

OVERVIEW

DEFINITIVE START

METAMORPHOSIS

STAYING STRONG

CHANGING ROLE OF TEAM AND FRIENDS

EVOLUTION OF SPORT AND FITNESS

GIRLS VS BOYS

FAMILY IS A BIG INFLUENCE

SHIFT IN RELATIONSHIP TO NIKE

MISSED OPPORTUNITIES





# WHY WE'RE DOING THIS

Do we truly get what motivates a woman to work out—and how those reasons shift as she moves through different life stages? Are we speaking to Sport Girls and Fitness Females as powerfully as we can? This journey is a quest to answer these questions—and to reveal opportunities for connecting more authentically with the Sport Girl and Fitness Female as they evolve their fitness choices to meet their changing needs and lifestyle.



# WHAT DEFINES THE SPORT GIRL & THE FITNESS & FEMALE

Whether she's playing a rival basketball team in high school, triumphing over the freshman 15, or sweating out the workday's stress and disappointments in spin class — a Sport Girl/Fitness Female stays active and sticks with it because it makes her feel good, it makes her feel accomplished, and it makes her feel confident about taking on the world in front of her. Her love of sport and movement isn't just an activity. It's what she does when hanging out with friends. It's what Mom did, it's what Dad did, it's what cousins do. It's her entertainment. It's her networking tool. It's her source of knowledge and inspiration for inner strength, for navigating work, relationships and life at large!

AT HER  
CORNER?

"FEELING,  
ACCOMPLISHED"

*"Feeling Accomplished"*  
is the **#1 motivator** for  
women in all life stages, in  
their online conversations  
around sports and fitness



**HIGH SCHOOL**  
TAILOR & FRIENDS TOY AND  
KIM; PLUS 22,375 TEEN SPORT  
GIRLS ONLINE



**COLLEGE**  
ASHLEY & ROOMMATES MORGAN, JACKIE,  
CASEY & TENNIS FRIEND IVIE; PLUS 12,361  
COLLEGE FITNESS FEMALES ONLINE



**POST - COLLEGE**

KIAL & SISTER LAINE & GYM BUDDY/  
EMPLOYER BETSY; PLUS 72,468 FITNESS  
FEMALES AGED 23-40 ONLINE



# OVERVIEW



**A Definitive Start in High School**



**Metamorphosis in College**



**Staying Strong Post-College**

**Defining Feature**

**Identity & belonging**—To define who she is, what she does well, where she fits

**Metamorphosis**—explore independence, balance freedom & discipline

**Balancing act**—find an anchor as she juggles multiple roles & responsibilities

**Why She Plays/ Works Out**

**Defines who she is**  
Passion & identity with the sport & the team

**Physical fitness**  
Fight freshman 15  
To take back control of her body

**To center herself, to clear her head, to re-energize**

**The Arena**

Literally, the field or the court

Her body & mind

Her life

**Whom They're Competing Against**

The rival team

Herself

Ever-expanding demands on her time

**What Accomplishment Means**

**Winning**  
Beat the rival team, take home the scholarship, break the record

**Finding motivation and self-discipline** to keep fit

**Finding the time to work out, inner strength** to deal with whatever life throws her way



# DEFINITIVE START IN HIGH SCHOOL

A girl's high school life is centered around identity and belonging. Her in-group, the "thing" she does, the type of shoes she wears—this is a life stage where a girl is keen to define who she is through her activities and friends.

## I PLAY BECAUSE...

"IT'S A PART OF ME. IT'S WHAT I DO." "BASKETBALL IS LIFE!"  
"I PLAY BECAUSE IT MAKES ME FEEL GOOD TO THE POINT WHERE NOTHING ELSE MATTERS." "IT'S MOTIVATION. IT'S THE INTENSITY, THE AGGRESSIVENESS, THE CHALLENGES THAT KEEP ME GOING AND GOING AND LOVING IT MORE."  
"I REALLY DON'T CARE ABOUT MY WEIGHT. BUT IF YOU'RE IN SHAPE, THEN YOU COULD GET UP AND DOWN THE COURT FASTER. LIKE YOU'RE LOOKING GOOD BEATING EVERYBODY!"

## I'M COMPETING AGAINST

"WE'RE...I'D SAY A PRETTY HIGH LEVEL TEAM. WE PLAY AGAINST A LOT OF HARD COMPETITION. TOP TEAMS AND ALL THAT. TOP TEAMS ALL THE TIME." "WE WANT TO STAY IN SHAPE AND STAY FIT, AND BE ABLE TO RUN SO THAT WE COULD COMPETE WITH THEM AND BEAT THEM, YOU KNOW, SO WE COULD BE AT THE TOP OF THE FOOD CHAIN."

## ACCOMPLISHMENT IS ALL ABOUT WINNING—

"BEAT THE OTHER TEAM, SHOWED THE GIRLS WHAT I COULD DO"

This is the lifestage where the competitive nature of Fitness Females is at its strongest: 29.8% of sports-related online conversations by teen girls are centered around competition; that drops to 9.8% of all sports-related online conversations when Fitness Females are in their post-college years.



**NO. 01** | TAILER, 17, SENIOR AT NARBONNE HIGH SCHOOL  
 BASKETBALL TEAM SINCE FRESHMAN YEAR  
 (HAS RECEIVED BASKETBALL SCHOLARSHIP OFFERS  
 FROM UTAH STATE & CAL STATE FULLERTON)

# A CULTURE OF & COMMUNITY SPORTS

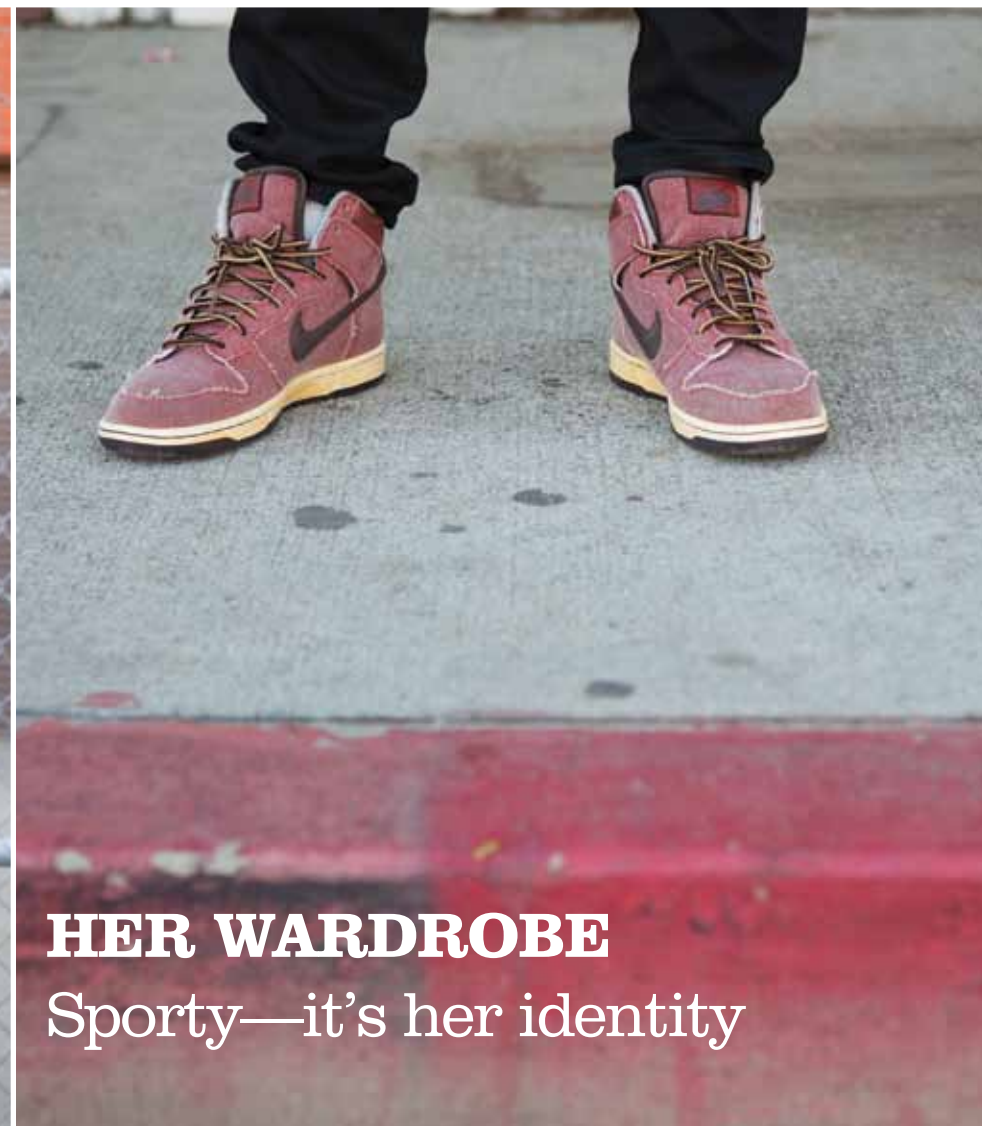
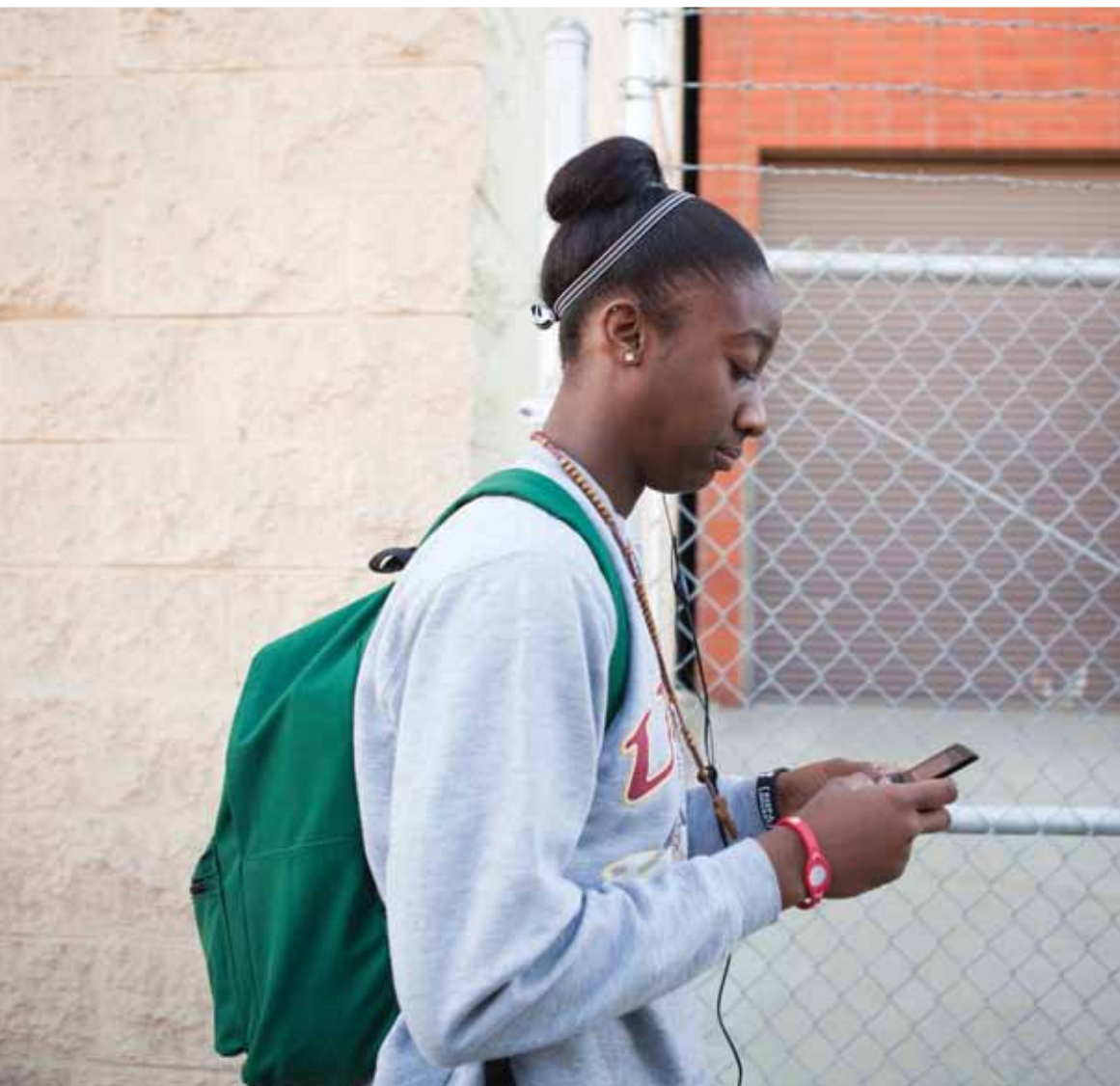
“feeling connected” is an important motivator for women, ranking #2 in all life stages—just behind the #1 motivator, “feeling accomplished.”

The competition unfolds on the basketball court, on the soccer field—wherever the sport is played

## Sports is a community effort

Her team, her coach, her family, and her school-mates are all part of her rally team. “Uncle Tyrone taught her how to dribble, but I gave her her first basketball.”

TAILER'S AUNT



**HER WARDROBE**  
 Sporty—it's her identity



### Messaging opportunity:

Talk about the **sport**, talk about **winning**, talk about “we” not “me”

While this is the age when a Sport Girl's connection with Nike is strongest, that connection still misses the mark in terms of underscoring the importance of “team” and “we” for girls. Winning is still important for girls. But what they revel in is the COLLECTIVE POWER of a team of fearsome women. They're not self-absorbed in the herculean effort of a single athlete. What's more, coaches also perceive an imbalance in the programs and support that sports companies extend to the girls' teams, in contrast to what they make available for the boys' teams.

OTHER INTERESTING TRENDS

CONVERSE SHOES ARE EVERYWHERE.



ROSARY NECKLACES ARE MAKING A COMEBACK.



TOMS SHOES APPEAR IN JUST A FEW NICHE GROUPS



UGG BOOTS ARE STILL IN VOGUE!





# METAMORPHOSIS IN COLLEGE

College life is an exploration of independence, as girls learn to navigate the balance between freedom and discipline. Whether it's managing their time, their body, or checkbooks and credit card bills, college girls relish the freedom and struggle to gain control as parents, coaches and other familiar support systems disappear.



The competition unfolds in  
**MY MIND &  
BODY**

## I WORK OUT BECAUSE...

"I MOSTLY JUST DON'T WANT TO GET FAT."  
"I WORK OUT BECAUSE I REALLY ENJOY LIFE,  
AND IT WILL ONLY ADVANCE ME IF I KEEP MY  
BODY HEALTHY." "I THINK IT'S IMPORTANT TO WORK  
OUT BECAUSE IT REALLY DOES HELP YOUR MOOD,  
AND IT JUST MAKES YOU FEEL OVERALL BETTER  
ABOUT YOURSELF."

## I'M COMPETING AGAINST MYSELF

"IN HIGH SCHOOL I DIDN'T REALLY LOOK AT IT AS  
WORKING OUT. IT WAS MORE GAMES AND WINNING.  
THAT'S DIFFERENT NOW THAT I'M IN COLLEGE. IT'S  
MORE COMPETING AGAINST MYSELF, TRYING TO PUSH  
MYSELF TO DO SOMETHING THAT I'VE NEVER DONE."

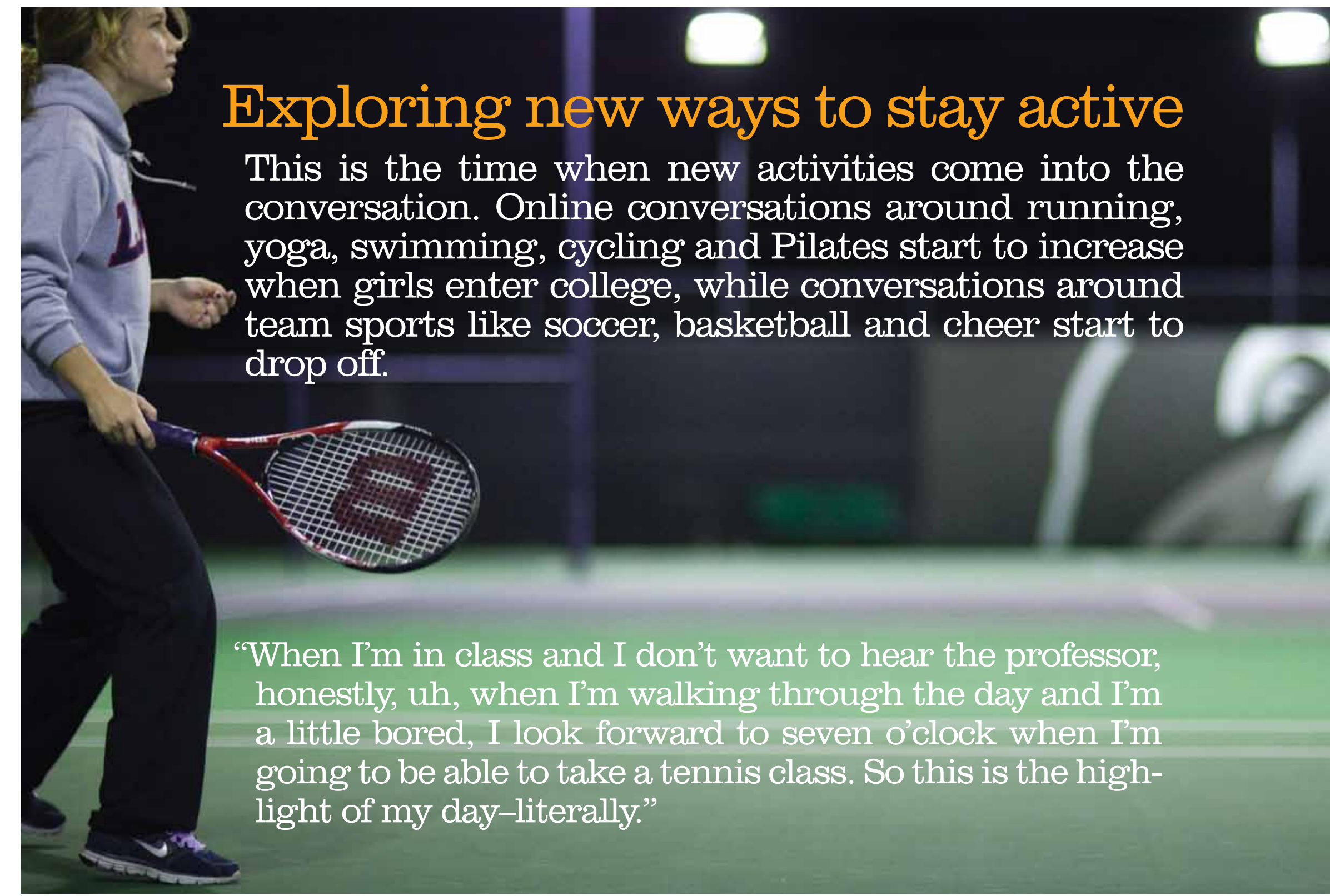
## ACCOMPLISHMENT IS ABOUT FINDING THE MOTIVATION & SELF- DISCIPLINE TO KEEP FIT

"A LOT OF THINGS MAKE IT DIFFICULT TO WORK OUT.  
PEOPLE COME FIRST, MY FRIENDS COME FIRST,  
MY HOMEWORK COMES FIRST. BUT I TRY TO FIT IT IN  
BETWEEN." "STAY SKINNY." "ON A STRESSFUL DAY LIKE  
THIS, I FEEL BETTER AFTER I GO TO THE GYM."



# A CULTURE OF EXPERIMENTATION & EXPLORATION

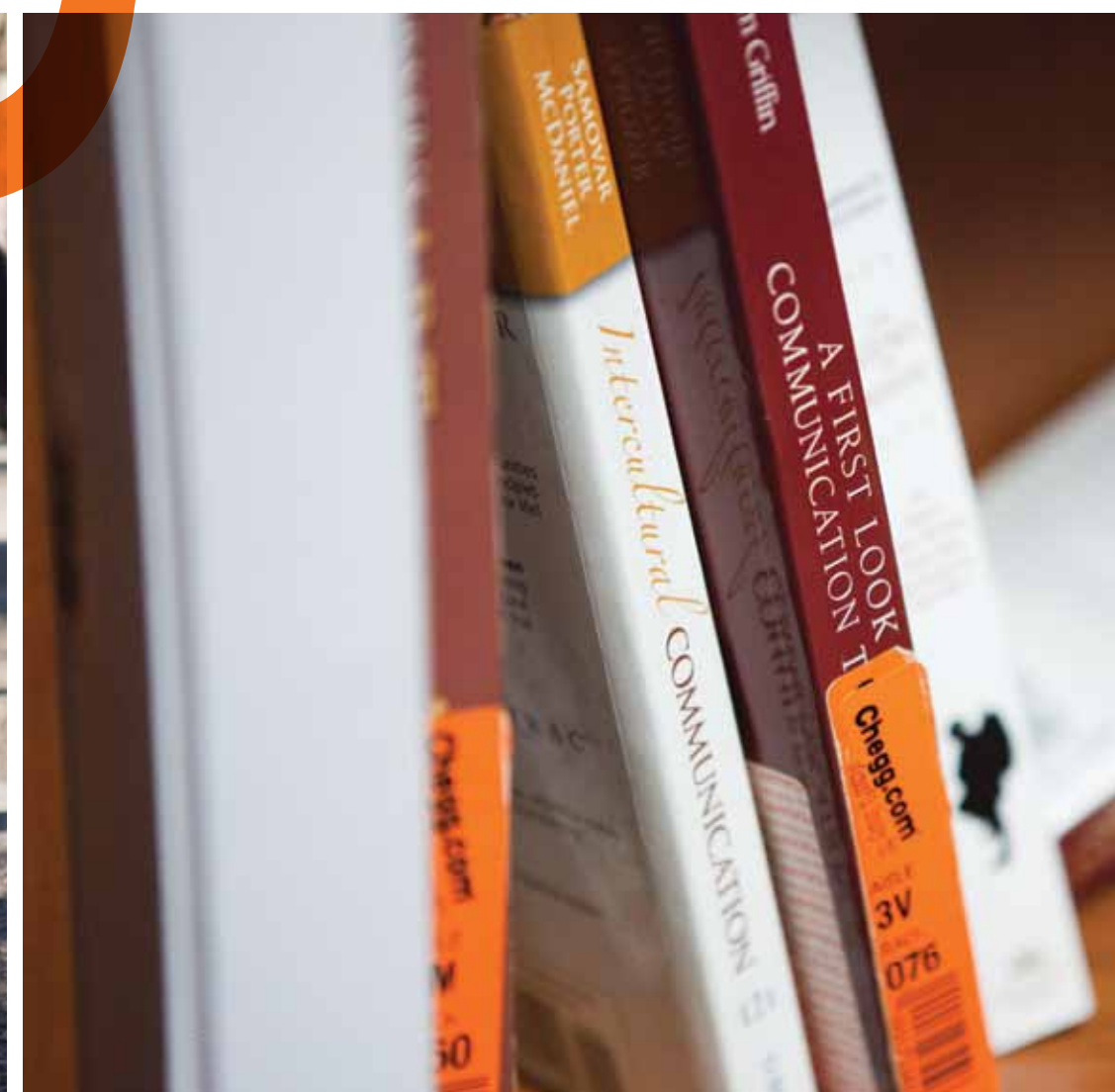
Her wardrobe is changing but **EASE & AFFORDABILITY** are key! She's opening her wardrobe to more styles and brands, but mostly she's looking for things that are easy to throw on and just go, easy to care for, and easy on the wallet.



## Exploring new ways to stay active

This is the time when new activities come into the conversation. Online conversations around running, yoga, swimming, cycling and Pilates start to increase when girls enter college, while conversations around team sports like soccer, basketball and cheer start to drop off.

“When I’m in class and I don’t want to hear the professor, honestly, uh, when I’m walking through the day and I’m a little bored, I look forward to seven o’clock when I’m going to be able to take a tennis class. So this is the highlight of my day—literally.”



Technology is an integral way of life. They love Apple, would rather wait than go to a competitive search engine when Google's down, and are on Facebook all the time.



## Messaging opportunity: Be my coach, my trainer, my connector

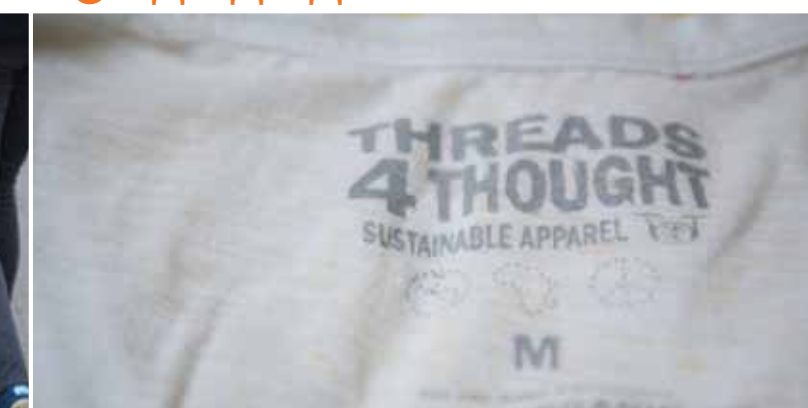
The love affair she had with Nike in her youth is no longer as pronounced. Where it reignites is when she has a chance to reconnect with the brand in a more intimate way—like the Nike Woman's marathon. They love it when Nike gives them a goal they can feel excited about, something to motivate them, and an avenue to connect with and find support from other women.

### OTHER INTERESTING TRENDS

VICTORIA'S SECRET PINK SWEAT PANTS ARE THE RAGE.



CAUSE-DRIVEN EVENTS AND PRODUCTS ARE EVERYWHERE.



TOMS SHOES ARE EVERYWHERE.





# staying strong POST college

The arena where the competition unfolds is  
**LIFE ITSELF.**

## I WORKOUT BECAUSE...

"I WORK OUT BECAUSE I FEEL GREAT AFTERWARDS.  
IT HELPS CLEAR MY HEAD."

"I WORK OUT TO PRESERVE MY SANITY."

"WORKING OUT IS DEFINITELY AN ANTIDEPRESSANT.  
AND IT'S ALSO A TOTAL DE-STRESSOR."

## I'M COMPETING AGAINST THE EVER-INCREASING DEMANDS ON MY TIME

WORK, BOYFRIEND, THE BOSS, PARENTS, HUSBAND, IN-LAWS, CHILDREN,  
SCHOOL, NEIGHBORS —THE CHALLENGE IS TO BALANCE IT ALL.

Life post-college is a delicate balancing act as women play more and more roles in life. Worker, wife, mother, daughter—she strives to maintain her center and not lose her sense of self as she takes on more responsibilities and demands on her time.



## ACCOMPLISHMENT IS ABOUT INNER STRENGTH

"ON A BAD DAY, WORKING OUT IS SOMETHING THAT JUST REINVIGORATES ME AND HELPS ME LOOK AT THE WORLD FROM A FRESH PERSPECTIVE AND JUST THINK, IT'S ONLY GOING TO GET BETTER." "AFTER THE PAST FEW RAINY DAYS THAT WE'VE HAD, IT WAS REALLY GREAT TO GET OUT IN CENTRAL PARK FOR A RUN. THE SUN POKED THROUGH THERE FOR A WHILE. AND I FEEL GREAT. I'M READY TO GO. PUMPED UP FOR THE REST OF THE DAY."



# A CULTURE OF LIVING WELL

## FITNESS AS A SOURCE OF INNER STRENGTH

**PHYSICAL:** working out calms the nerves, fortifies the body, and replenishes one's energy for work, for family, for life

**MENTAL:** perseverance, focus, determination, teamwork—

Fitness Females leverage lessons from sports to overcome life's challenges

**SOCIAL:** whether it's through running circles or yoga class, Fitness Females make new friends and network through their workout circles. Working out together is a way to build relationships with new co-workers and friends. And it's a great way to hang out with friends too!

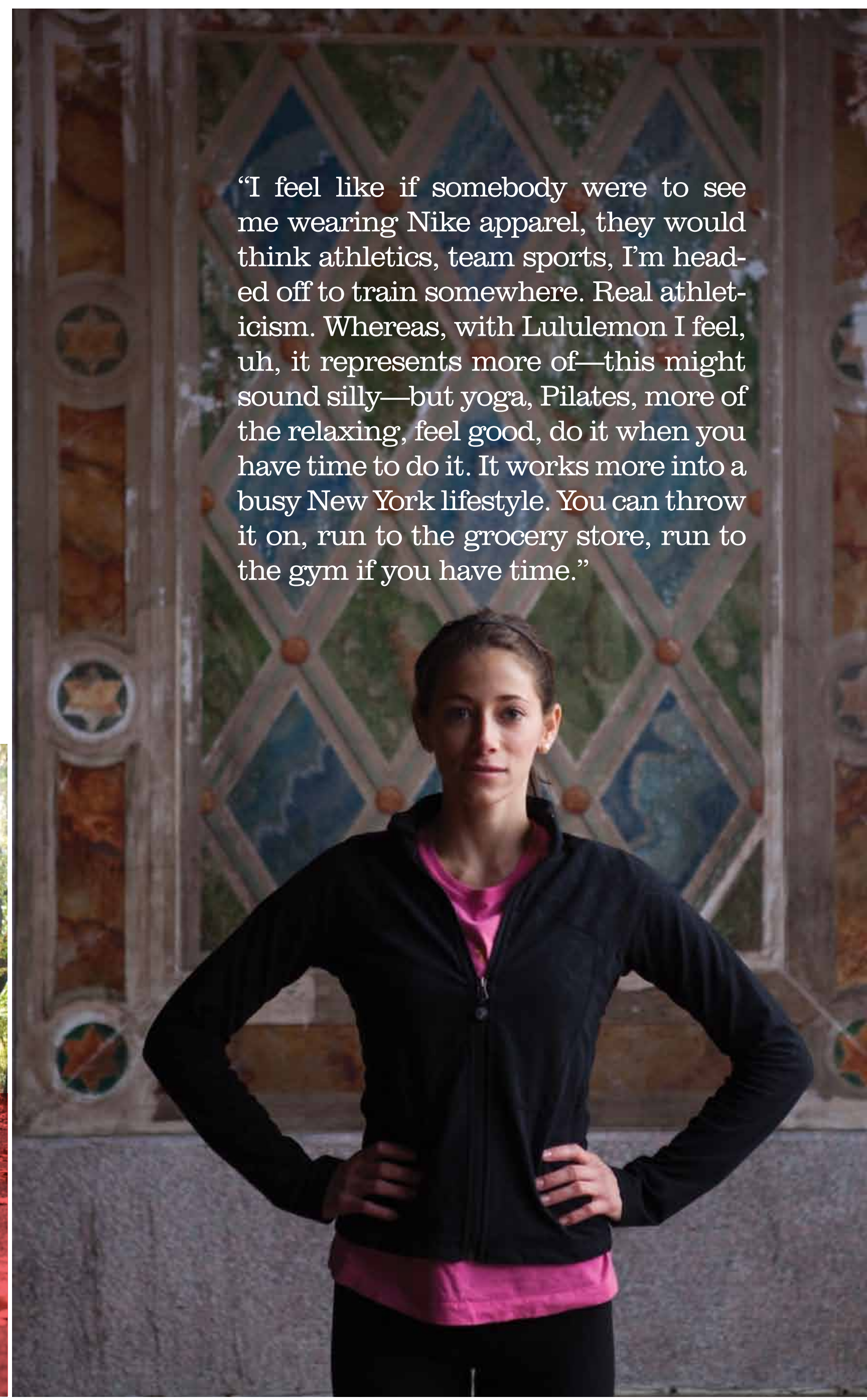
She wants a wardrobe that brings her joy and fits into her balanced lifestyle

"I like clothes that look cute. I don't love to wear things that screech, I'm headed to the gym. And while working out is something I love, I don't want to be one of those people who talks about it all the time to everybody they meet. So I tend to go for things that are comfortable, but also look cute and are diverse in that you're able to wear them anywhere in the city."

"I feel like if somebody were to see me wearing Nike apparel, they would think athletics, team sports, I'm headed off to train somewhere. Real athleticism. Whereas, with Lululemon I feel, uh, it represents more of—this might sound silly—but yoga, Pilates, more of the relaxing, feel good, do it when you have time to do it. It works more into a busy New York lifestyle. You can throw it on, run to the grocery store, run to the gym if you have time."



Mention of Lululemon in online fitness conversations **JUMPS 3-FOLD** from high school to post-college, while mention of Nike drops by almost **ONE-THIRD.**



## Messaging opportunity: My sport is my life

Her view of Nike is not negative. It's recessed, not top-of-mind. A warm memory from childhood. A memory of her days as a serious athlete. She still buys Nike — sports bras especially! But the spark in the relationship is gone. Yet the values that keep her going in life—being strong, being a team player, not losing belief in herself whatever life throws at her—all these are essential Nike brand values! The problem is that all these values are locked inside the world of competitive sports and athletics—something that is no longer relevant in many Fitness Females' post-college life.

OTHER INTERESTING TRENDS

DINING OUT WITH FRIENDS

TOMS SHOES

LULULEMON BRAND VALUES

CELEBRITY TRAINERS



Life is full of setbacks. YOUR OUTLOOK ON LIFE IS A DIRECT REFLECTION OF HOW MUCH YOU LIKE YOURSELF. DO IT NOW, DO IT NOW, DO IT NOW!



# CHANGING ROLE OF TEAM & FRIENDS

# 100 FEET

## POST-COLLEGE LIFE

**FITNESS → LIVING WELL**  
There's less time to work out but that time is sacred and an important anchor and source of inner strength for the post-college Fitness Female life.

## COLLEGE LIFE

**SPORTS → FITNESS**  
Self-motivation, discipline, exploring new workouts to fit her lifestyle – these are habits that the college Fitness Female will take with her for life.

## HIGH SCHOOL LIFE

**SPORTS**  
Is a huge part of the high school Sport Girl's life. Teamwork, perseverance, ability to take criticism – these are sports lessons she will take with her for life

## Evolution of & SPORT & FITNESS

### High School

Team = key reason why to play sports

### College

Friends = support to work out, but NOT the reason to work out

### Post College

Work out = social avenue to meet new friends, and common interest to strengthen new friendships





### We vs. Me

“And the girls uh, sometimes they start to play the sport because they just want to have that friendship – you know, meet new friends and stuff like that.”

COACH VICKI SANDERS

NARBONNE HIGH SCHOOL GIRLS' BASKETBALL

# GIRLS V. BOYS

## FEELING CONNECTED

trumps “feeling powerful” and “adventurous”

While the #1 motivation for both Fitness Females and Fitness Males is “feeling accomplished,” females are almost twice as likely to talk about “feeling connected.” Males, on the other hand, are significantly more likely to talk about about “feeling powerful” and “feeling adventurous” when it comes to online fitness discussions.

## INCREASING GENDER GAP in Nike's Cool Factor

The gap between males and females in Nike's TRU Cool Factor has been widening over the years, from just a **2 percentage point** difference in 1997 to a **15 percentage point** difference in 2010!



# FAMILY IS

## A BIG INFLUENCE ON FITNESS FEMALES' ACTIVE LIFESTYLE



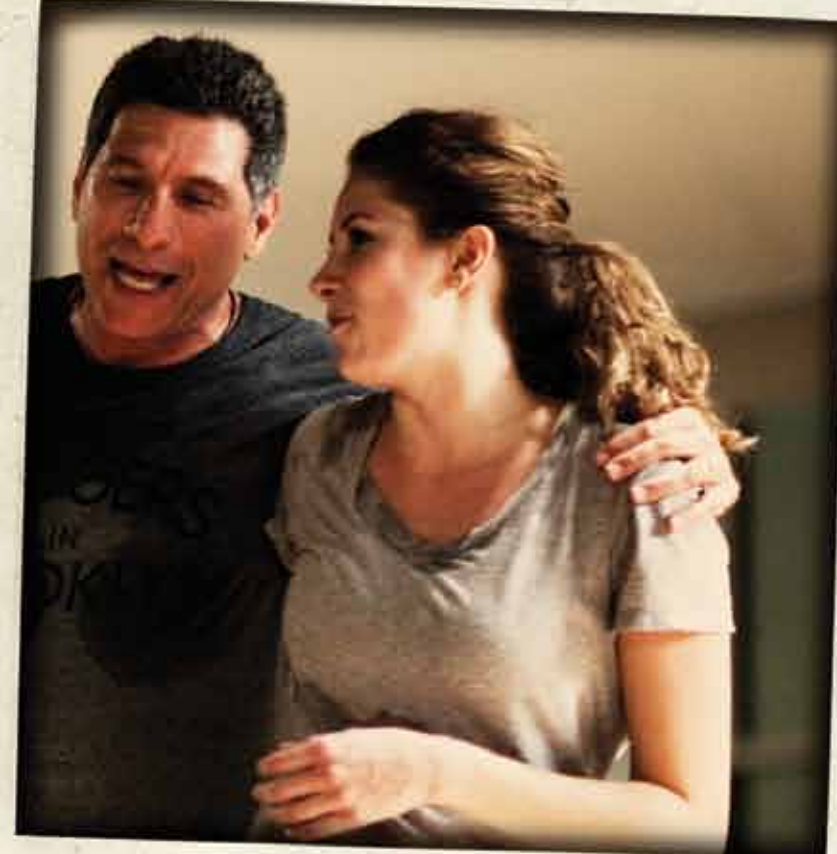
HIGH SCHOOL  
TAILER & FAMILY



COLLEGE: ASHLEY



POST-COLLEGE: KIAL



“My parents come to all the games. They never miss a game at all.”

**TAILER, HIGH SCHOOL SPORT GIRL AND SENIOR ON NARBONNE HIGH SCHOOL'S GIRLS' BASKETBALL TEAM.**

“This is Tailer's dream. This is the only way I can go. I can go no other way but with her on this, and if you help them follow their dreams, they'll achieve.”

**GAETRICE, MOTHER OF HIGH SCHOOL SPORT GIRL, TAILER.**

“I play tennis now because it's fun and it gets me better so when I go home I can actually, like, play with my dad—and compete. He beats me every time, but it gives me something to bond with my dad over when I go home.”

**ASHLEY, COLLEGE FITNESS FEMALE AT LOYOLA MARYMOUNT.**

“They've been skiing since before they could walk, actually; one on my back, one between my legs. I introduced my daughters to sports as soon as they were capable of doing sports because they meant so much to me. Sports gave me my greatest challenges, my greatest accomplishments, my deepest disappointments, the ability to overcome things, the ability to push myself. And also the greatest pleasures in life. And you want your kids to enjoy life and have the greatest pleasures in life.”

**JAY, FATHER OF NY POST-COLLEGE FITNESS FEMALE, KIAL.**





# HIGH SCHOOL



NIKE CONNECTS WELL WITH THE SPORT GIRLS COMPETITIVE SPIRIT AND DESIRE TO WIN—ALTHOUGH IT CAN DO BETTER BY TALKING MORE ABOUT “WE” INSTEAD OF JUST “ME.”



# EVOLUTION OF RELATIONSHIP TO NIKE



# COLLEGE



WHILE NIKE IS STILL IN THE MIX, MORE BRANDS COME INTO PLAY AS THE COLLEGE FITNESS FEMALE REDEFINES THE ROLE OF FITNESS AND WHAT MOTIVATES HER IN LIFE, AND BUDGET BECOMES A BIG DECISION INFLUENCE.



# POST COLLEGE



AS THE POST-COLLEGE FITNESS FEMALE SHIFTS HER FOCUS FROM HARDCORE SPORTS AND FITNESS TO BUILDING INNER STRENGTH AND WELL-BEING, NIKE'S PLACE IN HER LIFE DIMINISHES TO A NOSTALGIC MEMORY OF HER ATHLETIC PAST (AND A FEW SPORTS BRAS AND TOPS!).



# MISSED OPPORTUNITIES



NOW

NIKE GIRL = WORKOUT GIRL,  
INTO COMPETITIVE SPORTS,  
SERIOUS ATHLETE, FOCUSED  
ON PHYSICAL FITNESS



NIKE WOMAN = SOMEONE WHO  
DOESN'T GIVE UP, GETS THE JOB  
DONE, A STRONG WOMAN I WANT  
ON MY SIDE AND ON MY TEAM

OPPORTUNITY





# BEHIND THE SCENES

**FACTS, QUOTES AND OBSERVATIONS  
MADE IN THIS BOOK ARE BASED ON  
THE FOLLOWING SOURCES:**

• WITNESS ETHNO-DOCUMENTARY STUDY

CONDUCTED OCTOBER TO NOVEMBER OF 2010

15 ONE-ON-ONE TELEPHONE INTERVIEWS WITH SPORT GIRLS AND FITNESS FEMALES

3 IN-DEPTH TWO-DAY ETHNOGRAPHIES WITH:

# TAILER B., HIGH SCHOOL SPORT GIRL AT NARBONNE HIGH SCHOOL, LOS ANGELES

# ASHLEY N., FITNESS FEMALE SOPHOMORE AT LOYOLA MARYMOUNT UNIVERSITY, LOS ANGELES

# KIAL B., POST-COLLEGE FITNESS FEMALE IN NEW YORK CITY

• MOTIVEQUEST SPORT GIRL AND FITNESS FEMALE ONLINE RESEARCH STUDY

ANALYZED 382K ONLINE CONVERSATIONS AROUND FITNESS,

AUTHORED BETWEEN OCT '09 AND SEPT '10 BY 107K WOMEN UNDER 40 YEARS OLD

# 49K TEEN FITNESS CONVERSATIONS BY 22K TEEN GIRLS

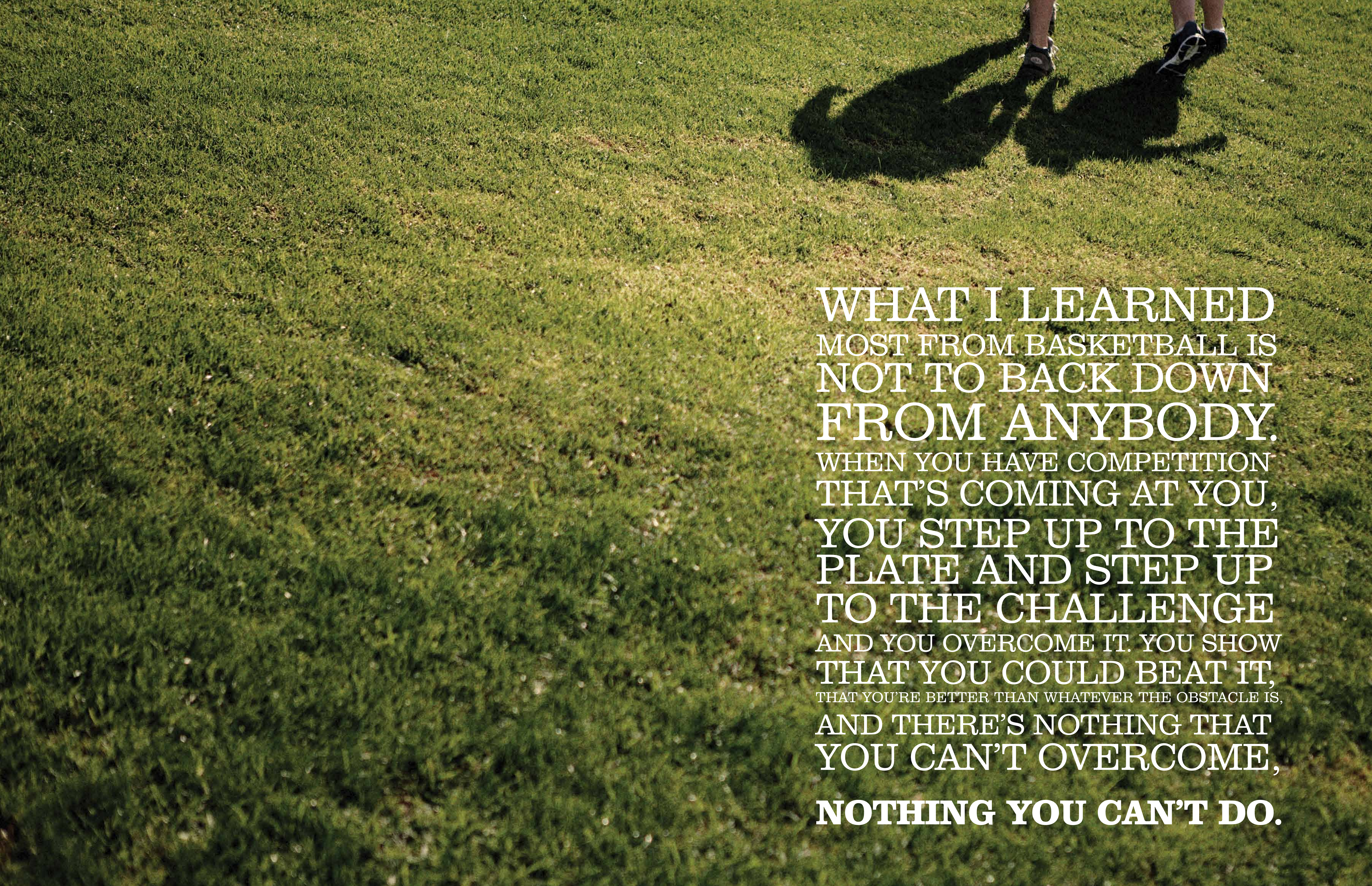
# 23K COLLEGE FITNESS CONVERSATIONS BY 12K COLLEGE GIRLS

# 310K POST-COLLEGE FITNESS CONVERSATIONS BY 72K WOMEN 23-40 YEARS OLD

• TRU NIKE COOL FACTOR QUANTITATIVE SURVEY, 1997 TO 2010







WHAT I LEARNED  
MOST FROM BASKETBALL IS  
NOT TO BACK DOWN  
FROM ANYBODY.  
WHEN YOU HAVE COMPETITION  
THAT'S COMING AT YOU,  
YOU STEP UP TO THE  
PLATE AND STEP UP  
TO THE CHALLENGE  
AND YOU OVERCOME IT. YOU SHOW  
THAT YOU COULD BEAT IT,  
THAT YOU'RE BETTER THAN WHATEVER THE OBSTACLE IS,  
AND THERE'S NOTHING THAT  
YOU CAN'T OVERCOME,  
**NOTHING YOU CAN'T DO.**



IF EVERYTHING ELSE IS FALLING APART  
ON THE JOB FRONT OR LIFE IN GENERAL,  
WORKING OUT IS THE ONE CONSISTENT  
THING THAT I KNOW I CAN CONSTANTLY  
PUSH MYSELF FURTHER AND HARDER AND  
KNOW THAT I'M ABLE TO ACCOMPLISH IT.

