Lululemon Men's Product Segmentation and Positioning

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Executive Summary

This research represents a segmentation strategy to create a target market profile for Lululemon men's line of apparel clothing. After presenting the full target market profile, a correspondent positioning statement is developed based on segmentation findings of this research and analysis of Lululemon competitors for this specific segment. For this purpose, this study is primary driven by customer demand for men apparel clothing and segmentation that fits the most to highest possible demand.

First, a careful review of previous studies revealed that most male customers of high-end apparel fashion have tendency to purchase for sport specific apparel clothing rather than general clothing. Next, data from Statistics Canada supported the fact that Golf is the most popular sport activity between Canadians and have the highest sports participation between men. In addition, previous studies proved that consumer behaviour of Canadian and American golf players are very similar. As the result, this research's segmentation strategy is primary based on golf players and with a perspective for potential expansion to a larger target market profile.

Finally, by cross matching data from three different resources (Statistics Canada data for Active Sports Participants, Golf Canada and PGA Canada for gold statistics, and Vividata for general demographic data) a full segmentation has been performed.

According to Geographic, Demographic, Psychographic and Behaviour response analysis of this research, following segmentation fits the best segment for Lululmen men line of apparel clothing.

"Men golfers, aged 30 – 59, living at Alberta (City of Calgary), with University Level education, and household income of more than $80,000. They are married with a child aged 12-17, and work as a professional, executive manager or owner of a business. They are opinion leaders, play golf as much as they can, and they believe the cost is justified. Moreover, they play the game on any possible occasion such as for socializing, business and competition. They are also very loyal to the game, and take a specific pride in playing it. Moreover, they purchase high-end apparel clothing and half of them spend at least $250 per year only on golf clothes"

Following the above segmentation, and based on careful market analysis of Lululemon competitors, a mixture of Head-On, Technical Innovative and Lifestyle positioning strategy was chosen for Lululemon men line of apparel clothing. The following positioning statement have been developed for the mentioned segment.

"*For all dedicated men golfers, who believe golf is not just a game, but a life style, the Lululemon Alpha-series, are golfing apparel gear, that is exclusively crafted with state-of-the-art technology. Unlike Under Armour products, our product is not just a sportswear like any other sport; it's the secret language of real golfers*"

Introduction

Lululemon Athletica is the designer and manufacturer of apparel athletic products. The company has a reputation for producing high-end quality products with a focus on the female yoga pants. The main customers of the brand are sophisticated and educated females with a trendy passion for healthy life style. As part of the Lululemon expanding strategy, the company has decided to tap into men's line of apparel products.

This report represents marketing segmentation strategy followed by positioning strategy for the Lululemon new menswear line of products. At first, the Preliminary Segmentation Strategy explains what the main centerpiece for this segmentation is and why. Further, the segmentation is performed based on cross-matching data from four different sources, including Statistics Canada, Golf Canada, PGA Canada and Vividata. Following the segmentation, a detailed analysis of Lululemon competitors for this segment are presented and analysed in details. Finally, based on what have been discussed in earlier sections, a positioning strategy and positioning statement are created.

Preliminary Segmentation Strategy

In order to find the best segment for Lululemon men's products, first several studies from different sources are analysed to find out which segment of the market has highest potential of being the best segment.

1. Men aged 18-34, with 43% are the largest consumers of athletic clothing. However, they have a much more interest in buying specific sports clothing such as basketball or hockey jerseys (Schaneberg, 2016).

2. (Heroux, 2017) Suggests that Golf is the most popular sport between Canadian male players. Moreover, he mentions that marketing strategies for Canadian and American golf players are very similar in nature, with Canadian market having a higher standard in terms of product and services.

3. A 2005 study by Statistics Canada (Hurst, 2005) indicates several facts that contribute to higher participation in a sports activity. Although this research is from 2005, most of the facts can still stand due to their native.

    a. Canadians with more leisure time are more likely to participate in a sport activity. Every hour increase in leisure time would result in 1.2 x chance of being involved. As a result, older generations participate more because of the higher leisure time.
    b. Living with a partner increases the odds of participating. However, parents tend to have low participation due to low leisure time.

c. People in Quebec and British Columbia have a higher sports activity with British Columbia as the leader due to its West Coast weather conditions.
d. Higher income Canadians are more active in their leisure time than other categories.

4. The last study on Sport Participation from Statistics Canada in 2013 (Canada, 2013), indicates following facts:
   a. Men Participate in sport much more actively than women do.
   b. Age is significant factor in sport participation. Men aged 20-24 with 55% involvement followed by 25-34 with 40% and 35-54 with 30% involvement are the most active age group between males.
   c. Alberta has the highest number of participation in sports followed by Manitoba and British Columbia.
   d. The report indicates that people with College/Diploma and University degree have the highest sports participation across Canada.
   e. Students with 45%, part-time workers with 30% and full-time workers with 27% are the most active in sport in terms their job status.
   f. Level of household income influences the activity level. Household incomes with $80K + with 31% sports activity, followed by $50K- $80K with 25% sport activity are the highest.
   g. Most popular sports between men are Golf followed by ice hockey and swimming. Golf with 1.5 million adult players, which are dominantly men (76%). Ice hockey with 1.3 million players ranked second and other sports such as baseball, volleyball, basketball and soccer having players around 500K to 1 million ranked after them.

Given the fact number 1 and 3.g, this research is focused on finding a segment of male consumers that are interested in Golf or Ice Hockey sport. Since fact number 2, suggest that consumer behaviour of Canadian and American Golf players are very similar, we focus our segmentation on a segment of the market that plays Golf, regularly in order to increase chances of Lululemon products quickly adapting to US market in case of successful segmentation.

As the result, the main segment of Golf players that will be analysed are:

Men aged between 25-54(fact 1 and fact 4.b), have a higher household income than 50K+ (fact 3.d and fact 4.f), have a secondary education level or higher (fact 4.d and fact 3.c), living with their partner but not have a child (fact 3.c) and are living in Alberta, Manitoba or British Columbia.

In order to further insight in golf players to accomplish perfect segmentation, let us first have a look at Canadian Golf consumer behaviour.

Canadian Golf Players general statistics

According to (NAVICOM, 2012) golf population in Canada is 5.7 million (27% of Canadians) and is dominantly played by men with 70%. Golfers are well educated with 62% of them being post-secondary graduates and have a rather high income (26% 50K-75K and 42% above 75K).

12% of this population (approximately 3 million people) are very interested in the game.

On the other hand, number of people leaving the game is same as number of people joining the game with 18% meaning. This number would stay rather steady.

The population of golfers is generally segmented into two main segments:

- **Maintain The Base**: Golfers that "Golf is more than just a game, it's a way of life" – 26% of players = 1.5 million players
- **Sustain The Game:** Infrequent, Occasional, Frequent and Avid players – 74% of players = 4.2 million players.

For the purpose of this study, Maintain The Base golfers have been selected for several reasons which will be discussed in following sections.

1. Geographic Segment

In 2017, Golf Canada and PGA release a report on Golf facilities in Canada (Golf Canada and PGA, 2017). Canada with 2,298 Golf Facilities is the second rank in the world after Unites States with 15,014.

86% of all Canada's golf facilities are concentrated in Ontario, Quebec, Alberta and British Columbia. Ontario with 805 facilities, followed by Quebec with 359, Alberta with 308 and British Columbia with 304 are the top suppliers of golf facilities in Canada.

Since fact 4.c suggests that Alberta has the most number of people with active sports participation as their leisure time, Alberta has been chosen as primary choice of segmentation. Although in British Columbia, golf can be played all year round, and it has second most active participants in sports, Alberta with 16.5% leads in golf sport compared to 14.6% in British Columbia (NAGA, 2014). In addition, given that Alberta is ranked third in top supplier of golf facilities in Canada, it has been chosen as the Geographic Segment.

92% of Alberta's golf courses are open to the public. Interestingly, 61% of Alberta courses are 18-holes or more. On the other hand, 39% of 9-hole facilities are abundant in the province, implying that most of Alberta's golf population have tendency toward longer games. Above all, Alberta has seen a 5% increase in population of golfers since 2015, more than any other province in Canada.

In Alberta Province, Calgary with 31 facilities has largest number of facilities more than any other city in Canada. In addition, since 48% of Maintain The Base golfers are living in Urban areas and 31% living in suburban areas (NAVICOM, 2012) and Given the fact that city of Calgary is an urban area with many suburbs, this city is chosen as exact geographic segmentation.

2. Demographic Segment

In this segment the demographic characteristics of Calgary is analysed and compared to key factors that imply customer tendency to buy Lululemon Men line of apparel clothing based on Calgary golfers.

In order to make the best segmentation, first all the data from sources are taken into a table, and then after analysing the data corresponding to the segment with highest chance of purchasing Lululemon Men apparel clothing is performed by comparison.

Demographic data from three different resources, corresponding to Calgary population Demographics (Vividata, 2016), Canadian Maintain The Base golfers (NAVICOM, 2012), and Canadian Active Sports participation (Canada, 2013) are used to display data across all demographic sections. In other word, the segment that offers best purchasing demand based on demographic population of Calgary that correlates with having characteristics of an Active Sport Participant and Maintain the Base Golfers.

In each section, the demographic data will be trimmed down to sub-sections and at the end of this section the final decision will be demonstrated based on analysis of individual sections.

2.1 Age

As discussed above, Table 1, demonstrates the age demographic population of Calgary, age demographic characteristic of Canadian Maintain the Base Golfers and Age characteristic of Canadian Participants of Active sports. The goal here is to find the largest population of Calgary people that are have similar age characteristic of being a Maintain the Base golfers and being participants of active sports.

Age	18-24	25-34	35-49	50-64
Calgary (Vividata, 2016)	10%	21%	27%	22%
Canadian Maintain the base Golfers (NAVICOM, 2012)	22%	24%	33% (35-60)	21% (60+)
Canadian Active Sports participation (Canada, 2013)	34%	29%	23% (35-53)	17% (55+)

Table 1- Demographic segmentation based on Age- Raw Data from three sources to identify which category suits the suits the best segmentation

Now, In order to find a certain age group, it is necessary to unify these segments into smaller ones. Assuming that these percentages illustrate an even distribution in their range, following can be calculated.

Segment 30-50:

- Calgary population $= 27\% + \frac{21\%}{2} = 37.5\%$

- Canadian Maintain The Base Golfers = $\frac{24\%}{2} + 33\% * \frac{50-35}{60-35} = 31.8\%$
- Canadian Active Sports participation = $\frac{29\%}{2} + 23\% * \frac{50-35}{53-35} = 33.6\%$

Segment 18-30:

- Calgary population $= 10\% + \frac{21\%}{2} = 20.5\%$
- Canadian Maintain The Base Golfers = $22\% + \frac{24\%}{2} = 34\%$
- Canadian Active Sports participation = $34\% + \frac{29\%}{2} = 48.5\%$

Segment 50+: The rest of the probability would create the 50+

Following the general rule of probability of two events occurring together, the percentages are multiplied to find out which segment corresponds to compound probability of all events happening and therefore:

Age	18 – 29	30-49	50+
Calgary (Vividata, 2016)	20.5%	37.5%	42%
Canadian Maintain the base Golfers (NAVICOM, 2012)	34%	31.8%	34.2%
Canadian Participant of Active Sports (Canada, 2013)	48.5%	33.6%	17.9%
Calgary population that is the Maintain the Base Golfers and are participants of active sports	3.38%	4%	2.57%

Table 2-- Refined the data from Table1to find out which segment best suits the age segmentation

According to results of Table2, the segmentation of age between 30-49 years old with 4% of compound probability is the best age group, representing percent of Calgary Population that is the Maintain the Base golfer and are participants of active sports.

2.2 Income

Following same strategy as Age segmentation, The Table3 indicates the segments with their corresponding household income,

Income	20K<	20K-30K	30K-50K	50K-70K	80K+
Calgary (Vividata, 2016)	21%		12%	16%	51%
Canadian Maintain the base Golfers (NAVICOM, 2012)	32%			26%	42%
Canadian participant of Active Sports (Canada, 2013)	5%	15%	18%	23%	31%

Table 3-- Demographic segmentation based on Income- Raw Data from three sources to identify which category suits the suits the best segmentation

Looking at Table3 it is obvious that 80K+ is the best segmentation in terms of income segmentation.

2.3 Education

Education	No certificate or Less	Secondary/High School/Trade	University/ Non-University Certificates	Bachelor	Post Graduates
Calgary (Vividata, 2016)	12%	27%	23%	24%	15%
Canadian Majority of Golfers (NAVICOM, 2012)	Unknown			27%	24%
Canadian Active Sports participation (Canada, 2013)	28%	15%	25%	30%	

Table 4-- Demographic segmentation based on Education- Raw Data from three sources to identify which category suits the suits the best segmentation

Looking at Table4 the best segmentation would be individuals with University Level Degree and higher.

2.4 Occupation

Since in last sections we mentioned that we are looking at segmentation with rather higher incomes, this segmentation implies occupations with higher salary.

Occupation	Professionals	Senior Managers/Owners	Technical/Sales/ Teaching/Other	Clerical	Skilled/ Unskilled/ Primary
Calgary (Vividata, 2016)	9%	24%	10%	10%	47%
Canadian Majority of Golfers (NAVICOM, 2012)	35%		Unknown	Unknown	Unknown

Table 5-- Demographic segmentation based on Occupation- Raw Data from three sources to identify which category suits the suits the best segmentation- Professionals, senior Managers or owners as the segmentation

2.8 Marital Status and Household formation

Although there has not been a direct association between marital status, and active participation in sports or golf in specific, following facts from different researches are used to find best segmentation in terms of Marital Status and household formation.

According to fact, number 3.b, for every 1 hour of free time, there 1.2 times likeliness that individual participate in an active sport. As a result, married couples with children have less likeliness to participate. However, (NAVICOM, 2012) suggests that 50% of Maintain the Base Golfers have spouse that plays golf, and 40% have child that plays. As a result, the martial status of married with a child have been selected.

In Calgary, 60% of population is married and 24% have a child that is between 12-17 years old (Vividata, 2016). Given the fact that according to (NAVICOM, 2012), age of 12-17 with 23% engagement is the age when most golfers take up the game; it is highly likely for the children of Maintain the Base golfers to be engaged with the game.

Therefore, 24% of Calgary population that have a child aged 12-17 is selected as the segment for the martial status.

3. Behavior Response

(NAVICOM, 2012) has performed a full study on customer behavior of golfers. Results of this study are presented in following categories:

3.1 Benefits sought

They play the game for number of reasons: Socializing, Business, Passion for the game, Charities, Being the member of community, Learning and growing the popularity of the game.

3.2 Usage rate

They Play golf as long as they can, both in terms of rounds that are played and they play in variety of terms such as Competitive rounds, Business rounds, out of province, out of country and charity rounds.

3.3 Degree of loyalty

They are considered as the most loyal to the game as they take pride to the game and they consider golf as a game that is worthy of their support.

4. Psychographics

(Price, 2012) Suggests that consumer behavior of golfers are very much toward high-end brands. The study reveals that 50% of golfers spend at least $250 USD per year only on apparel clothing.

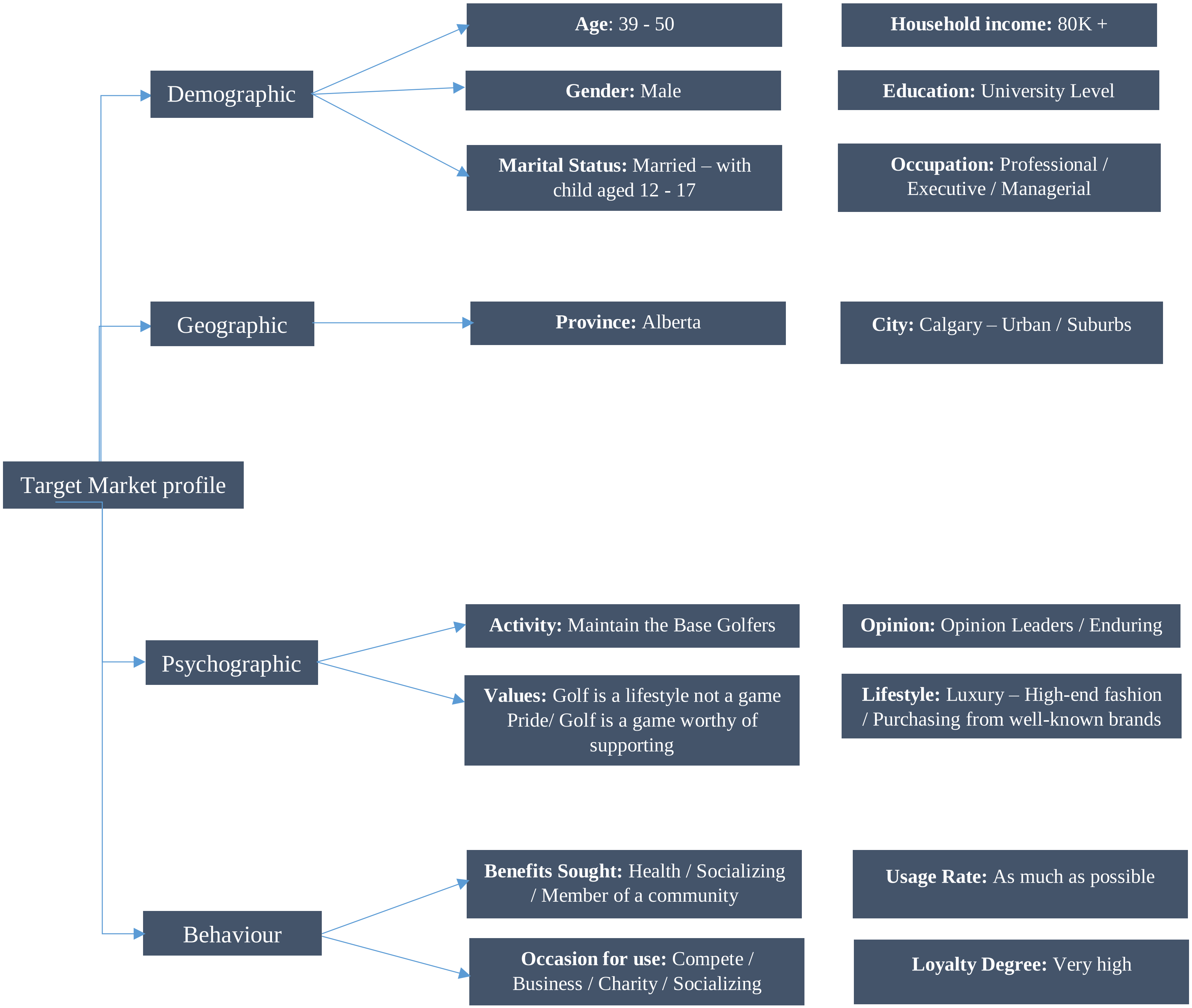
In this study, 45% of golfers voted that when buying golf apparel clothing, the stores physical design and appearance is very important.

59% of the golfers purchase their merchandise from golf Pro shops. Interestingly, unlike many other sports, like basketballs, the accessories are not bought from a general sporting goods store. Meaning, golfers definitely have a feeling of exclusivity because of their shopping patterns.

Moreover, 35% of golfers voted that it is *very important* for them to buy from well-known brand or designer products along with 49% that voted it *is important* for them.

(McGinnis, et al., 2004) Mentions several key factors relating to golfer’s psychographics. Most of the factors are focused on the fact that the game has a mediation element in it the game (Similar to yoga) that correlates with a sacred feeling. This feeling contributes to the game being considered as a ritual.

As a result, golfers tend to have a higher enduring involvement and therefore being opinion leaders who influence others opinion in a particular product category or activity


Target Market profile
Demographic
Age: 39 - 50
Household income: 80K +
Gender: Male
Education: University Level
Marital Status: Married – with child aged 12 - 17
Occupation: Professional / Executive / Managerial
Geographic
Province: Alberta
City: Calgary – Urban / Suburbs
Psychographic
Activity: Maintain the Base Golfers
Opinion: Opinion Leaders / Enduring
Values: Golf is a lifestyle not a game Pride/ Golf is a game worthy of supporting
Lifestyle: Luxury – High-end fashion / Purchasing from well-known brands
Behaviour
Benefits Sought: Health / Socializing / Member of a community
Usage Rate: As much as possible
Occasion for use: Compete / Business / Charity / Socializing
Loyalty Degree: Very high

Positioning

According to (Heroux, 2017) the apparel industry is expecting a 4% growth in next years until 2019 to 178 billion dollars. The leading market shareholders based on Forbes 2012 report are Adidas ($8.2 billion), Nike ($6.3 billion), Puma ($1.5 billion), Under Armour ($1.38 billion) and Lululemon ($1.37 billion). Therefore, the positioning strategy for new men line segment is set to compete with mentioned market leaders.

Positioning main strategy based on segmentation

Based on what was explained in the segmentation section, here are some of the key positioning factors that are important to be aware of before moving on to competitor's analysis.

- Golfers, and Maintain the Base golfers in specific, have a sense of pride in their interest in the game. They consider the game not just as a game, but as a lifestyle.
- They are opinion leaders. As a result, they are not scared of being different from usual which means with the right strategy they have the potential to bring Lululemon products in the industry.
- They have a taste for well-known, high-end brands of fashion.
- They are educated with a university level degree. This fact is very much associated with environmental awareness attitude.
- They take special pride toward the game.

Since this research's segmentation, income demographic indicates that customers have average household income of 80K+, this positioning fight is mainly focused on *exclusivity of the product* rather than the price or even quality.

With this fact in mind, next section will go through competitor's products and their positioning in the market.

Competitor's study

In order to analyze the competitor's activity towards golf products, a set of each competitor's golf related products are broken down here.

As mentioned earlier in section 4, 59% of golfers purchase their apparel products, in sport specific shops. Meaning they will look for products that are aimed exactly for golf. According to characteristic of this segmentation, the focus here is to find out the product variety and price range of each brand.

Table6, bellow is study of all available golf products of each brand with their related price range. All of this data have been gathered from online stores of the provider's website.

Brand	Golf Cap/Ac.	Golf Polo Shirt	Golf Shorts	Golf Shoe
Puma	$30	$75	$65	$200
	1 Product	1 Product	1 Product	1 Product
Nike*	$30 - $40	$80 - $150	$60 - $115	$140 - $265
	22 Products	26 Products	4 Products	18 Products
Adidas**	N/A	$75 - $95	$65 - $85	$80 - $230
	None	48 Products	27 Products	31 Products
Under Armour	$30 – $34	$64 - $94	$60 - $80	$180 - $300
	14 Products	95 Products	22 Products	9 Products

Table 6-Analysis of 4 top competitors of Lululemon men for Golf Sport - This table represents, each brand's price range vs number of available products

* Nike also offers variety of short and long sleeves, and Jackets, Hoodies and Gilets, Trousers and tights, socks and Accessories products that give the customers the option to choose one of them.

** Adidas has widest range of products and partnered with designers like Jon Rahm, Sergio Garcia, Dustin Johnson. In addition to all the above it offers 30 golf pants products, ranging from $65 - $90. Moreover, Adidas offers 13 variety of vests, 18 Jackets and 21 hoodies.

Analysing the Table6 would provide an insight on what each competitor is trying to focus on. Following table presents the result of analysis on and their perspective toward positioning strategy. In order to be more specific, each brand is categories in two main elements: Variety of products.

Brand	Strength	Weakness
Puma	- Known for quality of shoes - Price range at medium to low	- Extremely low number of product variation. - Active in many fields of sports and as a result, low exclusivity in golf. - Mass seller and therefore low exclusivity.
Nike	- Known for quality - Price range medium – highest - Medium range of product variation	- Associated with active athletics in wide range of sports. Therefore, low exclusivity on only golf sport. - Mass seller and therefore low exclusivity.
Adidas	- Product variation is almost double Nike, and a price range at medium, lower than its competitor, Nike. - Adidas has collaborated with designers like Jon Rahm, Sergio Garcia, and Dustin Johnson. Since golfers have a taste for designer's clothes, it can be an advantage for Adidas. - Since Adidas has many golf products it will elaborate on their exclusive activities in golf.	- Active in wide range of athletic sports, therefore low exclusivity for golf. - Mass seller and thus low exclusivity
Under Armour	- Under Armour has medium product variation in respect to Nike and Adidas, except its polo shirts with 95 products. - Price range aiming at medium except some of expert golf shoes at highest price. - Very high exposure in terms of muscularity image, which is in its advantage since golf is dominantly played by men.	- Mass seller and thus low exclusivity - Under armour is active in other sports as well, therefore if a competitor comes with a focus on golf, it can be a slight disadvantage to Under Armour.

Table 7- Analysis of strength and weaknesses of each brand as competitors of Lululemon Golf products for men

Studying Table7 revels that most Lululemon competitors are already working on this segment. However, they all lack one important element, and that is *Exclusivity* since they all are active in several athletic market, with a mass selling to public. Figure-1, bellow, demonstrates findings of Table 7 corresponding to positioning of brands in terms of price range versus exclusivity of their golf products.

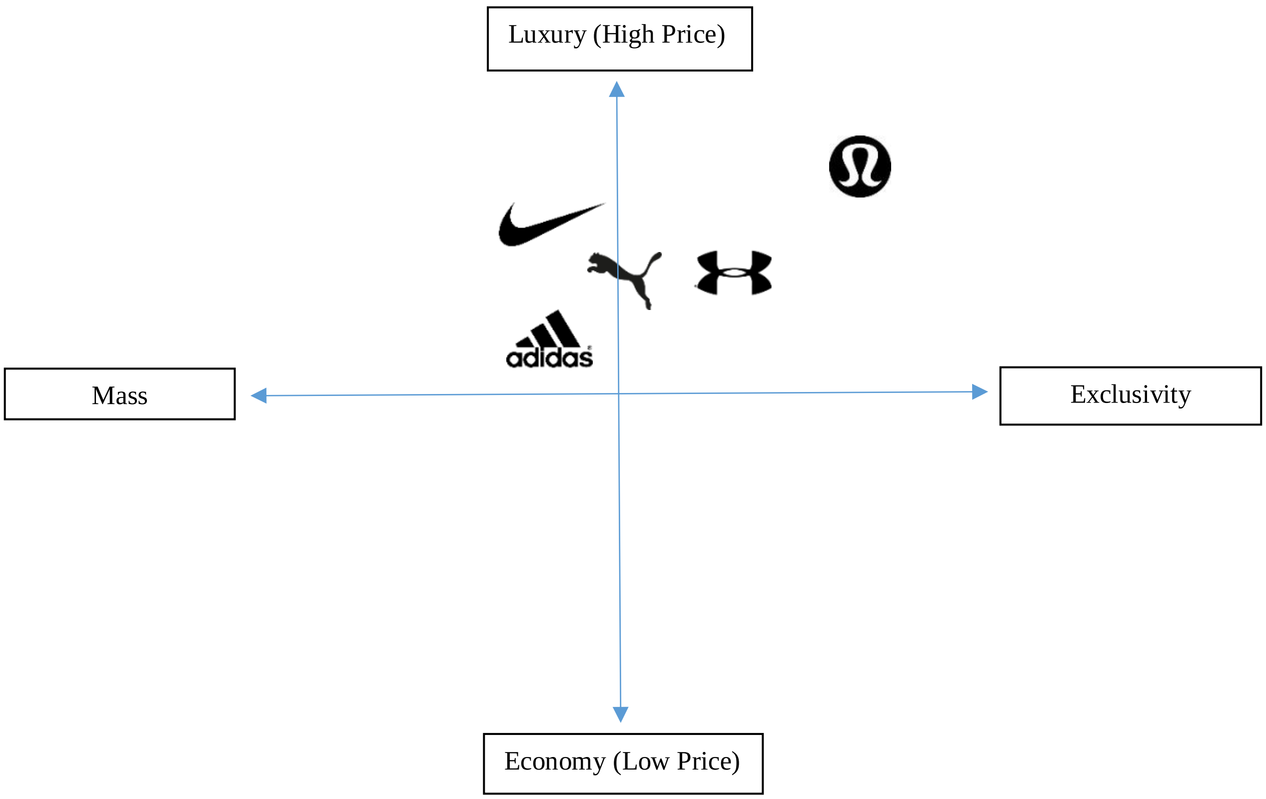


Figure 1- Comparison of positioning strategies of top 4 Lululemon competitors in men's products for Golf.

As it was discussed in the beginning of this section, the marketing edge for positioning strategy of this research's segmentation is "Exclusivity", given the certain characteristics of this segment.

Looking at Figure1, it is obvious that Lululemon clearly has a chance at entering the Golf products segments for its men consumers.

Developing a golf product for Lululemon menswear can work in exact same manner that it worked with yoga for Lululemon womenswear. The main reason behind this fact is that, the segment is screaming for a well-known, high-end brand to stand out as their exclusive choice. However, the main challenge for Lululemon will be presenting the brand as masculine, manly brand in oppose to Lululemon current picture as famine product since golf is a predominantly a men's sport with 82% male participants (NAVICOM, 2012).

Succession in this task can be a breakthrough in a very rapid expansion of Lululemon mens apparel products in golfer's segmentation and ultimately, spreading the product in other segments too. Similarly, Lululemon was first known for its yoga products for women, however, after a while, the yoga pants were used everywhere including, gym, jogging, and even work. Thus, using same strategy with golf for men can be a big winner for the company.

Positioning Statement

As the result of above-mentioned reasons, the positioning statement will focus at Exclusivity of Lululemon brand and its technological innovation and will try to make a very masculine, manly image of the brand in oppose to its previous famine image. In order to do so, the name of Alpha series are chosen to create a manly image of the products.

Using the For, Who, the, That, Unlike, Our Product formula, the following positioning message is made:

"*For all dedicated men golfers, who believe golf is not just a game, but a life style, the Lululemon Alpha-series, are golfing apparel gear, that is exclusively crafted with state-of-the-art technology. Unlike Under Armour products, our product is not just a sportswear like any other sport; it's the secret language of real golfers*"

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