

The Challenges of Bringing Pro Sport Tech to the Mass Market Consumer

What we're
going to
cover.....

- A Growing Need
- The Existing Options
- Market Potential
- Smart Clothing's Status
- Changing Our Mindset
- Everything To Play For

There's a growing demand/need for helping people take control of their body.....

- 7.8m people live with heart disease with healthcare costs of £9b per annum
- 63% of UK adults are overweight (BMI +25), that's 35m people
- Orlistat is prescribed every 2.5 mins; 20% of UK adults wants to lose weight; 4000 people a day search online for ways to lose weight fast
- 1 in 4 of us will suffer some form of mental health problem
- 79% people believe wellness is important and 42% consider it a top priority
- 70% adults were motivated to get healthier in 2021 – lose weight, exercise more
- 10.3m people have gym membership
- Reasons for not exercising – lack of ability/knowledge, lack of support, fear of injuries, lack of motivation

.....and wearables used in pro sport, defence and space offer insight to help.....

	STATSports®	Zephyr	HEXOSKIN	equivital®	ATHOS	FIRSTBEAT
Heart function	●	●	●	●	●	●
Breathing function		●	●	●	●	
Stress						●
Motion	●	●	●	●	●	●
Muscles (sEMG)					●	●
Temperature		●	●	●		

.....and the market penetration of wearables suggests there is consumer demand for the insight

- Smart wearables market was estimated to be \$18b in 2021 with a forecast of \$20.6b this year
- Growth rates to 2028 range from \$42b to \$118b
- Clothing is ubiquitous
- Who is delivering the majority of the revenue?

 **WATCH**

Galaxy Watch4

 fitbit®

GARMIN®

POLAR®

.....yet Smart Clothing hasn't kept pace with this growth.....

Zephyr

FIRSTBEAT

HEXOSKIN

equivital

MYANT HEALTH

AiQ[®]
Smart Clothing

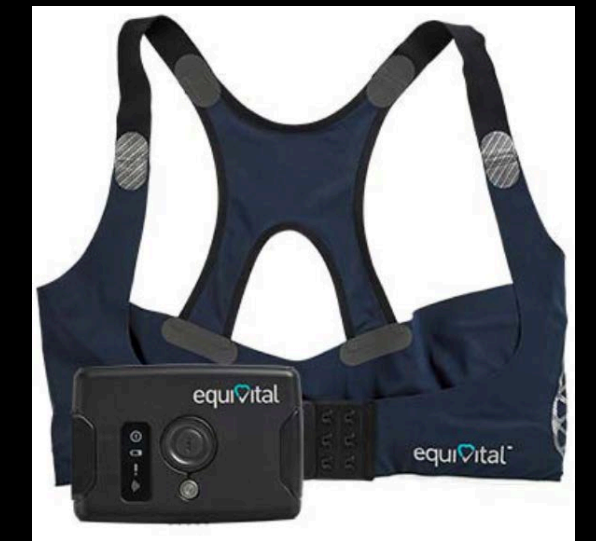
ATHOS

NURVV

signal

.....so what's preventing Smart Clothing from gaining traction with consumers?....

- We have a choice – look, feel, comfort
- We don't have deep pockets
£250-500+
- We're time poor
- Lots of data ≠ lots of value add
- We don't employ a team of specialists
- Most of us don't want to be, or can't be, pro athletes



.....however, there are things that can be done to reverse this.....

- Consumer led design, not engineering led
- Target a sensible price point
- Easy to use, easy to care for garments
- Th electronics are not the star of the show
- Insight should educate users and empower them
- Answer *the* four simple questions.....
- Make the Insight relevant for the user's ability and lifestyle
- Keep driving for independently validated accuracy, people will care about it

.....there's every opportunity for Smart Clothing to win, and you can help us.....

- There's everything to play for in the Smart Clothing sector
- Designing for consumers is really hard, but it's the only way to succeed
- We often need things faster than University project timelines allow
- We need more female-centric research
- The usual small MOQs you ask for are large for a start-up sector