



In second place...

Footwear keeps on running up the street, but apparel only walks off the shelf, says The NPD Group

The running market is worth £415million in Great Britain for the year ending June 2008, according to NPD Group's Consumer Panel. Footwear accounted for around three-quarters of sales (£300million), with apparel accounting for the remainder. Is this a normal trend among the main sports? No - football apparel regularly generates over 70 per cent of all football category sales and there's a similar pattern with the other two largest sectors (leisure and outdoor), both achieving 60 per cent of their sales from apparel.

So why do running shoes account for such a high proportion of their category sales? Using NPD's Consumer Panel, we can see that running shoes are the second largest footwear category behind leisure and carry the highest average price per pair (£38). Running shoes are amongst the most technical of all footwear and the top 10 brands cover over 90 per cent of overall sales. However, running apparel is a noticeably more fragmented market, with the top 10 brands making up just over 70 per cent.

Spend big?

In contrast to footwear, running specific clothing is the fifth largest apparel category and does not command the high average price achieved in footwear (£11 vs £38 for footwear). So it appears that consumers do not feel the need to spend big on running clothing, seeming quite happy to run in apparel made for other sports, or may even just use t-shirts and shorts.

NPD's Consumer Panel can also track usage in order to determine what activities people are using their purchases for. Looking at running apparel purchases, 50 per cent of consumers use their goods specifically for running. The second highest usage is for leisure, but is some way back at 27 per cent, showing that consumers mainly use running apparel for the purpose it is made for. If you study the reasons for purchase, 'Fit' is the top answer with 'It was cheap' the second most popular. What is interesting is the average price of consumers

answering 'It was cheap' is £10, a figure that's only £1 lower than the running apparel average.

Within running footwear 'Fit' is again the top reason for purchasing, but 'It was cheap' is also ranked high. So how does the price compare with apparel? In footwear £23 was considered cheap, which is a marked difference and an indication of how much people are prepared to pay for performance footwear.

Crossover

Running footwear differs again from apparel in that consumers also wear their footwear for leisure (37 per cent of running footwear purchases are bought for leisure usage). This is a noticeable difference to apparel where leisure usage accounts for a much smaller percentage, showing that running clothing doesn't necessarily crossover into the mainstream.

Looking at average prices again, the other two top sports (football and outdoor) command



apparel prices far higher than the market average, indicating that consumers have a high regard for performance clothing when taking part in these activities. Running has nowhere near this type of balance, which points to the high number of entry-level runners who currently run in non-performance fabrics.

This situation needs to be addressed so that consumers see the same benefit in technical apparel fabrics as they do in technical footwear. Breathable fabrics are now commonplace in gyms and for runners, but there needs to be more education and awareness with regards to their functionality. For now it seems the message comes across on footwear, but not apparel. 💡

The NPD Group monitors the sales of sports footwear and sports apparel in many countries around the world. For more information contact The NPD Group sports team on 01932 355580.

