



Polished performer

Despite tough economic conditions, the running sector remains relatively strong, says The NPD Group

Over the past 18 months the running category has remained one of the jewels in the sports footwear market's crown. While many categories have seen sales decline over this period, sales of running footwear used for sport have continued to grow.

The NPD Group reported that volume sales grew three per cent during 2009 when compared to 2008, while total footwear sales declined by three per cent during the same period. Average selling prices were slightly down on the previous year, but performed better than many other categories. This is a particularly strong performance when you factor in the state of the economy and rising unemployment. So what drove this trend?

Mature buyer

Running differs to other categories in that it has a noticeably older average age - nearly 50 per cent of purchases are made by people over 30. This more mature buyer may be one of the reasons the category has held up so well, since youth unemployment has risen faster than for those over 25.

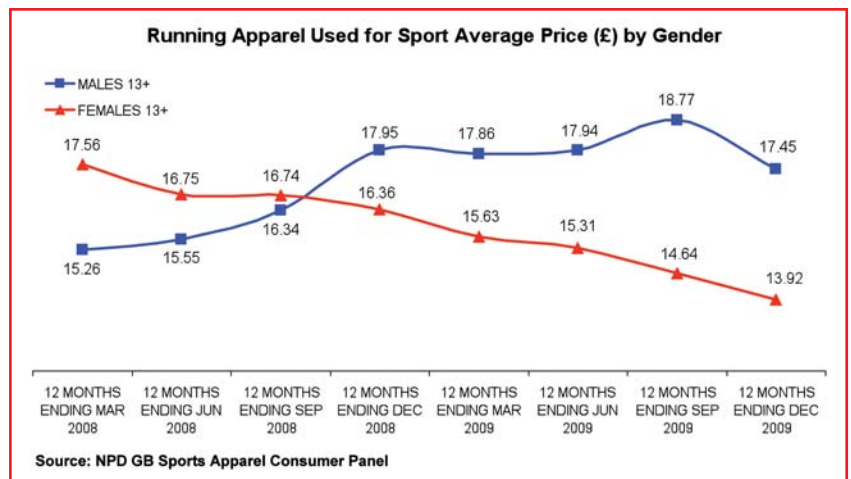
Interestingly, we have not seen sales

growth in running apparel used for sport. In fact, we see a higher number of runners wearing non-running specific apparel. This tells us that people see a running shoe as essential to the sport, but not so with apparel, which obviously reduces the cost of participation. No costly gym memberships are needed, or specialist clothing, just a pair of running shoes and the open road.

Throughout 2009 value sales to females grew faster than to males. This

could be a by-product of the lower prices charged in the female sector. The average price for female core running apparel has been on a gentle quarterly decline since March 2008, whereas males prices have been creeping up. Value sales to males have always been higher than females, but this gap has closed consistently since prices have declined.

It was during Q3 in 2009 that the level of volume turned round - females began to purchase more products and



pricing was at its most effective. During this period males were spending almost £4 more on running apparel than females - and then a change occurred.

During the 12 months to December 2009 sales of male apparel started to dip on a like-for-like basis for the first time since March 2008. Volumes were declining quarter on quarter, however we have seen a full circle swing with male prices falling and females increasing. It appears there is a price needed to reinvigorate the market, but also a maximum price that the consumer will tolerate.

Similar to footwear, the larger proportion of sales in core running apparel are generated by people aged 30 and over. This is at a more prevalent level in the male sector, as around 70 per cent of purchases are made by men over 30. In the female sector there is close to a 50/50 split, with the younger age groups in this category spending more. This could be because of the widely held belief that younger males take a greater interest in team sports, whereas females often prefer to train alone.

Influencing purchases

When we look at the factors that most influenced the purchase of core running apparel, the answers given by males and females are very different. Males are swayed by technical function and quality while, as you would expect, the fit of the product was the most popular answer, but not by much.

With females, how well apparel fits is the number one reason for purchase; however, cost is also an important factor, and one that is becoming increasingly important. For both genders price is an important consideration, but the scale of reductions in female apparel leads us to believe that they may be upscaling. Certainly this appears to be true when you look at the growth of the top running brands.

Nike, adidas, Marks & Spencer and Reebok account for over 90 per cent of the growth of female running apparel. Smaller brands are not challenging the large established labels for the attention of the running female. It is possible that this may change as the economy becomes more stable, but for now running apparel might not be a must-have for females, but the lure of the brand is. **51**

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.

