

Photo: Interstoff Asia

Looking for winners #1

The future is good for design, bad for hype

The most common question that my work team raises after trade exhibitions is a variation of 'what's new/what's happening' - all expect something revolutionary, but breathe a sigh of relief when it transpires that there has only been evolution of designs.

Dynamic change is unsettling for all the industry; the parameters of the marketplace move over time and it is only those products which fall desperately behind the focus of the customer that need to catch up in such a way. If there is genuine dramatic change to introduce, then it is worth 'dumbing down' the technology for the launch stage so that the consumer can easily comprehend the new field of operation and hence is happy to convert to it. The sales team will also be grateful for the potential to introduce newer developments (gradual evolution) in the forthcoming seasons.

Push and pull

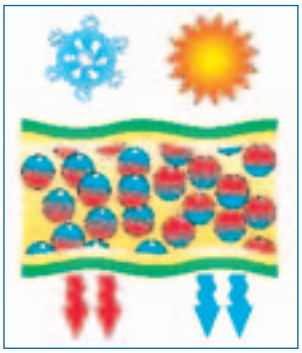
Technological developments fail to be accepted mainly because of poor communication through the chain of partners; the most famous of which was the breathable waterproof fabric which 'made you stop sweating', according to the shop assistants. As is well known, this led to disappointment with the product and affected repurchase patterns. To communicate a new message successfully is difficult and where the professional skills of marketeers should be trusted. The most desirable option is to create a 'pull' factor by educating the end consumer directly but this is the most costly method of communicating and makes the sales chain semi-redundant. With technological improvements, the strength of the 'push' tactics should be used more. The performance sports industry prides itself on its separation from the ordinary High Street retailers by the amount of technical knowledge available at the point of sale: it is advised to use this positive attribute in the enthusiasm of the sales team to enhance the product and provide it with the third party credibility that will sell it.

The failing is when the message about improvements has not been communicated successfully from the fabric producers, to the designers and brand marketing team, thence onto the retailers so that they can knowledgeably inform the consumer - this centres on what benefit it brings to the use of the product. If a company is that keen on educating the consumer directly then there is little need for partners in the sales chain and, in time, it will move onto direct sales methods.

The key to spotting the potential for improvement to be accepted by the end user is to examine the gear that is being used. Is it designed specifically for purpose or has the user adapted it? Another main indication of a product development required is whether the gear has been borrowed from another activity - Marigold washing up gloves being used for ice climbing were an obvious sign!

The hyped product

Introduction of new technologies that are not justified by features that are needed by the user end up being regarded as a hyped product. The younger consumers (especially Generation Y) are much more marketing literate and now shy away from such direct promotions - waiting for third party endorsement from their peer group before considering purchase. It is this recommendation that can be provided by the



The patented ComforTemp® DCC system contains micron-sized Thermasorb® additives. With their unique ability to absorb and release heat, they cool or warm your body. Using your own body heat, they will continuously "recharge" themselves for prolonged comfort and protection.

'push' marketing techniques. Partnerships between different levels of the selling chain combine to produce a stronger promotion than the parties acting alone, at a lower overall cost.

Using this analysis method, it is interesting to see what real developments are happening in the performance sports market. The overall theme is that clothing is having a new lease of life, taking the attention back from the equipment. Actual developments are centring on stronger, lighter, more efficient materials in garments which are more sport specific. The 'fashion' market has adopted the multi-sport garments; high performance sports now have a better level of functional design. A return to natural fibres is noticeable, although the synthetic bubble has not burst. Certainly ispo provided a complete contrast to 40 Degrees show in London, with few brands being showcased at both exhibitions.

In fabrics and fibres the introduction of phase change materials has begun at consumer level, and the silver thread of Xstatic, aimed to complement the human body, is being tried. Some brands are working more with wool products in baselayers - whether as Sportwool or as Merino. Certainly textures are taking on a more natural feel. The most noticeable development is that of UK retailer Marks & Spencer using a polyester mix in its underwear - a definite move away from its traditional heritage of white cotton knickers.

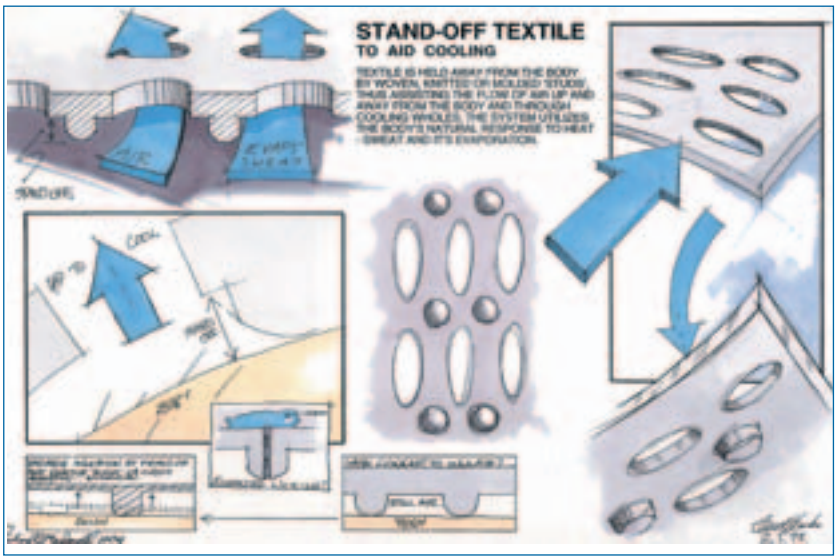
Insulation layers are still developing; fleece has been improved, fibre pile has not been well received, light insulation type fillings are appearing more often. New concepts of inflatable technology and electronics have not been fully accepted – yet. Advances in performance whilst wet and the ability to move body perspiration away from the base layer occupy the attention in this area.

Outer shell technology is still trying to provide a single layer which is both highly water resistant and very breathable: it has not yet been achieved. The windproof top layer still has room for development, especially as the potential of permanent water repellent finishes become more possible. This offers a better pricing structure and has more tactile quality.

Big and baggy

Shapes in sport fashion are still big and baggy - almost urban commando, whilst performance sport has become cleaner and slicker. Colours are too similar between the brands, caused perhaps by too much attention to the international style and colour specialists' briefings and the transfer of staff between companies on a regular basis.

Equipment offers some innovation but back systems need simplification - even a return to several different fixed back lengths. Waterproof zips, especially those mounted onto permeable fabrics, seem to be hype but do show potential for the future - if the consumer will wait around long enough. There is still room for progression here - people do not stand perfectly upright with horizontal shoulders - next there could be individual sides-of-body adjustment systems.



Nike design board illustration.

Children's clothing and equipment has benefited from the recent downturn in adult clothing sales; a period during which the performance brands have lost out to the fashion labels and the High Street. The new design energy is back in the established brands; expect little change on the toddler market whilst those brands take back their market from sport fashion territory.

Better individual cuts, more attention to the role of body functions, improved communication at point-of-sale, and a longer lifespan (not moving away from tradition so quickly) are the qualities of a brand which are as important as the publicised improvements from fabric providers. Asking the customer to keep up with the latest technology is harder than making a stronger bond with what they buy on comfort terms. Performance sportswear design developments have been around for a good 25 years; the generation which had purchased the most technology has grown up during this period, the styling has not.

The future customer is more informed, aware and individual; whether they still trust the promotion of the performance sports industry over the burst bubble of the fashion sports industry will be decided in the next few years. If they do, it means a smoother ride for all the partners in the sales chain; if they do not, then margins will have to increase to pay for the increased influence of branding. If customers are serious about their sport, they want the sportswear and equipment to take them just as seriously. That means specialised roles and gear.

The future, however, is more likely to be governed by the mistakes of the marketing teams than advances in the other areas.

Charles Ross is a visiting lecturer on the Derby University's (UK) postgraduate Performance Sportswear Design course & one of the contributors to the new EU funded Leonardo CD project on the role of design in the industry.