Brand Loyalty in the U.K. Sportswear Market.

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Abstract

This study investigates brand loyalty and other brand performance metrics in the UK sportswear market. It utilises consumer purchase data kindly provided by Taylor Nelson Sofres. The study finds that empirical regularities discovered by Andrew Ehrenberg and colleagues apply to sportswear brands - including iconic brands such as Nike and Adidas. The main findings are that (1) sportswear brands enjoy polygamous loyalty from their buyers; (2) the market exhibits the classic double jeopardy pattern whereby smaller brands have slightly lower loyalty; (3) consumers switch between sports brands approximately in-line with their market share; and (4) a brand's performance with respect to any demographic-based consumer sub-group is approximately the same as it is in the population generally. That is, sportswear brands tend not to have markedly different appeal to particular demographic segments. Therefore, even iconic brands and self-expressive, emblematic product categories show predictable patterns in brand performance. These well-documented empirical patterns should be used by research providers and brand managers to contextualise brand performance.

Introduction

There are many aspects to successful brand management. Principal among them is a sound understanding of the brand's competitive situation as reflected in performance metrics. Managers turn to their market research providers for these metrics, in many cases from consumer panels. How should brand performance metrics be interpreted - is a given score good, bad or 'about right' ? (Ehrenberg 2001). This study examines brand performance for sportswear brands, and does so using prior knowledge based on analyses of dozens of other markets (e.g. Ehrenberg, Uncles and Goodhardt 2004; Uncles, Hammond, Ehrenberg and Davies 1994). Three brand performance metrics are examined as part of this study:

Brand Loyalty – of the people who buy the brand, how loyal are they to it ? Does any particular brand get more loyalty, or less loyalty than it should ?

Brand Switching – if some buyers, at least, are not 100 percent loyal to a particular brand, which other brands do they buy ? Are there some brands that compete intensely against other particular brands, or does a brand compete equally against every other brand in the market ?

Brand Share among consumer groups. Market share is an essential performance metric, and is easily assessed. A step beyond simple market share measurement is to examine the brand's market share among various consumer groups, such as young or old; high income or low; small household or large. Does the brand have roughly similar market share across the spectrum of buyer groups ? Or does the brand have a higher market share in some groups and a lower market share in others. Answers to these questions can help the marketer more fully understand the competitive situation facing the brand.

Evidence

The precise answers to the questions posed above will differ for any particular brand and any market context. However, there is an array of evidence stretching over decades that gives broad expectations for these questions. First, brand loyalty has been found to follow a predictable pattern: large brands enjoy somewhat more loyalty (e.g. Ehrenberg and Goodhardt 2002; Ehrenberg 1991). Likewise, brand switching has been found to generally form a coherent pattern: brands share customers with other brands in-line with the market share of those competitors (Ehrenberg 2000; Ehrenberg and Goodhardt 1968). Functional differences between brands can mitigate this effect, but competitive imitation generally diminishes functional differences between brands over time. There has been less work on differences in brand performance among particular buyer groups, but analysis of dozens of product categories found that the users of competing brands have similar demographic and psychographic profiles (Kennedy, Ehrenberg and Long 2000). Indeed, demographics apparently explain little of the variation in brand choice (Fennell, Allenby, Yang and Edwards 2003). These findings suggest brand performance in consumer markets tends to be fairly evenly spread across the buying population: large brands are generally large in all demographics, small brands are generally small in all demographics.

But always ?

While there is an impressive evidence bank on these issues, marketers should still question whether these widespread patterns *always* apply. Surely there are some brands that are just so powerful they would not obey any 'laws' of marketing. Perhaps there are some product categories, such as those that allow consumer self-expression, which may not exhibit law-like patterns in buyer behaviour or brand performance. One product category that could fit this description is sportswear. Sportswear has grown

from an athletes-only niche market to become part of mainstream fashion. Some sportswear brands are argued to have become highly iconic. Nike is a well-publicised example. Nike is said to have a strong brand personality - consumers tend to see Nike as "the athlete in all of us" (Schiffman and Kanuk 2006 p. 133). Marc Gobe, a prominent marketing author says Nike "...[is] a good example of an emotional brand. It made sportswear accessible to non sportspeople with a brand story that inspired not just success but energy and determination" (Bouwman 2008). The famous Nike 'Just Do it' campaign is one of the top five advertising campaigns of the twentieth century (Aaker and Joachimsthaler 2000). Kevin Roberts, CEO of the famous advertising agency Saatchi and Saatchi, considers Nike to be more than just a brand. Rather, he sees Nike as a 'Lovemark' (2004). Among the criteria to be such a paragon of branding, a Lovemark has the requirement of inspiring "loyalty beyond reason" (see Roberts p. 78-79). The precise operationalisation of this term was not elaborated on in Roberts' book, but its use suggests that Nike's brand loyalty levels should be extremely high.

Of course, Nike is not without competition. Adidas is also a marketing behemoth. Over the decades, Adidas has built a strong association with sport and elite sportspeople (e.g. Aaker and Joachimsthaler 2000 p. 168) to build an impressive brand franchise. Adidas ranks at number 71 in the list of the world's top 100 brands, ahead of Rolex, Audi, and BP among others (Interbrand 2007). Other competitor brands in the analysis include Reebok, which is a very well known and well-regarded brand (e.g. Barry 2007; Howard 1996). Reebok, like Nike and Adidas, is supported by massive spending on club sponsorships as well as advertising. The other internationally known brands examined in this study are Umbro, Puma, Fila, and Diadora. Umbro has traditionally been somewhat different to the other brands in that it has focused on football wear, however its inclusion with this set of brands is still valid.

Aside from the iconic nature of some of the brands under examination, some authors suggest consumer motivations in relation to this category are unique. Sportswear and sportswear brands are argued to be consumed, at least in part, for symbolic (Piacentini and Mailer 2004) and emblematic purposes (Hogg, Bruce and Hill 1998). If these beliefs are true, then we might expect high levels of loyalty / commitment to sportswear brands.

Based on these observations, sportswear and the top brands that dominate it may represent a unique market, in which normal patterns of consumer loyalty, switching and brand performance may not be exhibited. This study examines purchase record data from the U.K. to identify if sportswear is indeed a unique market, or whether the empirical regularities documented by Ehrenberg and colleagues are exhibited. The study examines brand loyalty and brand switching; as well as brand market-shares across different demographic groups. If we find Ehrenberg-like patterns in sportswear data, this tells us that even iconic brands have predictable performance metrics. Conversely, the data might show that sportswear is a unique market. If that is the case, it is important to document its uniqueness, and then conduct further research to determine why sportswear is unique.

The analysis is based on data kindly provided by TNS from its Superpanel in the UK, comprising over 15,000 households. Consumer participants in the TNS Superpanel continuously record their purchases using in-home electronic terminals. The panel is demographically and geographically weighted to accurately represent the UK population. As such it represents a reliable and valid source of data for a study of this type.

The data was extracted as a subset of a general 'clothing' category in the TNS data. Sales records for the top seven recognised international sportswear brands were used. The market share figures are therefore not for the total market, but represent each brand's share of the unit sales of international-brand sportswear in the U.K.

Brand Loyalty Analysis

Brand loyalty is examined first. Only behavioural brand loyalty is examined – actual re-purchasing behaviour. Is there 'polygamous loyalty' ? Do some sportswear brands enjoy markedly higher levels of loyalty than others ? Is brand loyalty closely related to market share ? For this analysis, and the switching analysis that follows it, only households designated as 'singles' are used. This is to minimise the possible confounding effect on loyalty metrics of purchasing for a family's requirements.

Table 1 shows the share of category requirements for the seven sportswear brands. The brands are arranged in descending order of size. The loyalty measure is share of category requirements ('SCR') over a 12-month time period.

Insert Table 1 here

Table 1 shows that these buyers allocate around 60% of their requirements to one brand over a period of a year. This is consistent with Ehrenberg's observations of polygamous brand loyalty (Ehrenberg 2000). Of course, this figure partly reflects the fact that some buyers only buy once in the time period, therefore their loyalty rates are 100%. Over longer time periods the average share of requirements may be lower. The

more important issue is the comparison between the brands. We see the brands vary considerably in market share (the biggest is 16 times the size of the smallest), but there is much less variation in loyalty (68 percent SCR to 50 percent SCR). The brands are in market share order, and if we look down the 'share of category requirements' column we can see that the smaller brands obtain lower share of requirements (r=0.75). This is the famous 'double jeopardy' effect. This is an extremely useful generalization as it helps marketing managers and researchers to contextualise the brand performance of their particular brand: a manager of a large brand should expect somewhat higher loyalty, and a manager of a smaller brand should expect somewhat lower loyalty.

The double jeopardy effect is also graphed to make the relationship between market share and loyalty more apparent. We see that Adidas and Nike get more brand loyalty – they are big. Puma, Fila and Diadora get a little less brand loyalty – they are smaller. Umbro's loyalty is a little below what it perhaps should achieve given its size, given the general relationship between market share and loyalty. This effect could be partially attributed to its narrow focus on football, which restricts its capacity to cater to consumer's range of sportswear requirements. But to reiterate, there is not that much difference between the brands in terms of loyalty, with the smallest brand receiving around 50 percent share of requirements and the biggest brand receiving around 68 percent share of requirements. So there is no brand – not even Nike - that receives "loyalty beyond reason" from its user base. If Nike – a 'Lovemark' - can't do it, what hope do other brands have ?

Cross-Purchasing Analysis

We now examine how consumers spread their purchases across the competing brands over time. Table 2 is a 'cross-purchasing analysis'. It shows where each brand in this group took its sales volume from, and where the buyers of each brand allocated their future purchases. The numbers in the cells are the proportion of sales volume for the respective row – column brand pair. The rows sum to 100 percent.

To interpret the table, we look across the Adidas row in Table 2. We see the pool of Adidas buyers on average allocated 68 percent of their sportswear requirements to Adidas over the time period, 14 percent to Nike, 8 percent to Reebok, 5 percent to Umbro and so on. The brands share their customers with other brands about in-line with market share. This pattern has been found in numerous other categories, ranging from instant coffee (Ehrenberg, Goodhardt and Barwise 1990) to soft drinks (Bass 1974) to aviation fuel (Uncles and Ehrenberg 1990). For a wide ranging summary, see Ehrenberg, Uncles and Goodhardt (2004). The usefulness of identifying patterns such as this is, again, to contextualise the competitive situation: the buyers of any brand are, on average, most likely to *also* purchase Adidas or Nike sportswear - because they are the biggest brands. The buyers of any particular brand are far less likely to also buy Fila or Diadora, because they are the smaller brands in the market.

Insert Table 2 Here

Brand Performance Analysis across Consumer Segments or Groups
The third piece of analysis is to see how the performance of each brand is spread across various user groups. Modern marketing theory heavily emphasises market targeting,

which involves selecting a buyer group with a specific profile, rather than all buyers. While there is ample evidence that marketers try to target their brands, there is little evidence that this results in specific competing brands having a very high market share in certain targeted groups and little share among non-targeted groups[1]. While we cannot identify the target markets for these brands, or even if they have specified target markets, we can look at the spread of each brand's market share among a variety of consumer classifications and make some inferences from the results. This analysis approach links two key marketing concepts: segmentation, and brand performance measurement. To link these two concepts, consider that if a brand appeals to a particular consumer group, its user base will differ somewhat from that of other brands. For example, if a brand particularly appeals to younger buyers, then a bigger proportion of its user base will be young, compared to the user bases of its competitors. This is indicative of brand-level segmentation. Similarly, if a brand appeals to a particular consumer group, then it will have a higher market share among that user group than it has in the rest of the market. Therefore, examining the brand's market share in the market generally, and for buyer sub-groups (such as those based on demographics), simultaneously identifies the extent of brand-level segmentation as well as informing the marketing manager about the composition of overall brand performance.

For this brand performance analysis, we are interested in the wider population of buyers, so we do not restrict the analysis to 'singles' households as in the preceding analyses. We initially examine two basic demographic classifications that are widely used in commercial research. The first is the presence or absence of children in the household, The youth market is said to be particularly important to Nike and Adidas

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[1] By 'share' I am meaning a share of the purchases of people who do actually purchase the product category.

(Duncan 2005). If these brands are positioned for 'youth,' we would expect them to be markedly more popular in households with children. The second classification variable is social class. Social class is a typical segmentation variable as prescribed in marketing textbooks, for example Kotler and Keller (2006 Ch. 8). Social class also impacts on affordability, as it incorporates income and wealth status. Therefore if some brands are priced at a premium, this should be reflected in lower share among lower social class groups.

The performance analysis is simple: to compare each brand's market share within each demographic group. For example, does brand X have more market share, or less market share in demographic group Y than it does in demographic group Z, or indeed in the wider population ? This analysis method has the advantage of controlling for the fact that the demographic groups may have differing propensities to purchase the product category (Dawes 2006). The default expectation is that any brand should perform about as well in any particular demographic group as it does in the overall buyer population. Exceptions indicate segmentation, as well as being informative as to the brand's strengths and weaknesses as indicated earlier in the paper.

We commence by analysing brand shares, split according to the presence or absence of children in the household, as shown in Table 3. To make the analysis clear, we arrange the brands descending order of market share across the columns. We see that Adidas has a 33% overall market share. This share figure hardly varies across households with no children, one child, or more than one child. Market share for Nike is more variable across the demographic groups, with Nike having a 23 percent share overall, and 27 percent among no-child households. Umbro has somewhat higher market share among households with children compared to those without. However, the brands tend to

perform *about* as well into any demographic as they do overall. The variation in market shares across the demographics could be called *mild differential appeal* – the brands tend to be mildly more popular, or mildly less popular in some demographics than other demographics, but not by very much.

Insert Table 3 here

Next we examine social class, in Table 4. If we look across the rows for each demographic group, the main feature of the table is that the brand's market share in that social class closely follows the rank order of overall market share. Looking down the columns, Nike tends to perform slightly better among the higher-wealth classes. Umbro tends to exhibit the opposite effect: it is more popular among low-wealth social classes compared to high-wealth ones. Again, the term *mild differential appeal* is one way of summarising the overall result.

Insert Table 4 here

In Table 4 we again see there is some variation among the brands when we look down each column. That is, their market share in a particular demographic is not always exactly the same as for the market overall. However, the main feature of Table 4 is that the brand's market share in any particular social class closely mirrors its overall market share. For example: in AB households – 33 percent share for Adidas, 25 for Nike, 24 for Reebok. The rank order of these brands in the AB group is the same as the rank order of those brand's overall market shares in the wider population.

What this analysis shows is that there is no brand that has a massive share in one social class and a very small share in another social class. That said, there is some indication that Nike is a little stronger in the higher-wealth social classes compared to its position in the lower-wealth social classes. Perhaps this indicates some slight price-based segmentation. Reebok is a little weaker in social class D's and E's, whereas Umbro is stronger in D's and E's. But *overall* the impression is of roughly equal share among the five social class groupings. What if the brand manager notices differences such as these ? For example, suppose Umbro's management notices that Umbro is a little stronger in a particular group – say, that it has somewhat more market share among social class E's. Should it specifically target this group ? The answer is probably not, because only a fraction of total sales – eight percent - come from this group.

More detailed analysis

Critics of segment classifications based on say, social class or the composition of the household might say they are too simplistic and so will not capture the nuances or subtleties of consumer behaviour needed for proper marketing planning. Instead, marketers should use consumer classifications that are *designed* to capture differences in consumer behaviour. In line with this, let us now turn to a method designed for this purpose: ACORN. ACORN is a sophisticated geo-demographic clustering scheme (CACI 2007). The name is an acronym for **A C**lassification **O**f **R**esidential **N**eighbourhoods. The TNS Superpanel data for this category allows brand shares to be tabulated against ACORN clusters, as shown in Table 5. We show the ACORN clusters that account for more than two percent of sales for this product class. Some very small clusters are aggregated as 'others' because even with the large panel size, for this product category and for small ACORN clusters, the numbers of buyers are so small as to cause undue random error.

Insert Table 5 here

We see from the ACORN analysis that brands tend to have about as much market share within any geo-demographic cluster as they do in the wider population. For example, Adidas enjoys 33 percent market share of all the sales among these seven leading brands, among the wider population. Its average deviation from this figure is 4 points across the fifteen ACORN groups. It is the biggest brand overall, and has this position in 11 of the 15 ACORN groups. Adidas' worst performance is among the 'Better Off Execs / Inner City' cluster, in which it enjoys 22 percent market share. It is only the third biggest brand among this group. To Adidas' management, this difference in brand share (number one overall, number three in this group) might either sound either concerning, or represent an opportunity to target the 'Better Off Execs / Inner City' group to boost share. However, we must temper this idea by looking at the total sales accounted for by any particular ACORN group. The group in question, 'Better Off Execs / Inner City' accounts for *only two percent of total category sales* – as indicated by the second column in the table. A lower, or higher performance in any one particular customer group like this therefore makes only a tiny difference to the overall result for the brand.

Similarly, Nike's market share into any particular ACORN group also tends to mirror its overall market share. Its average deviation in market share is 3 points across the ACORN groups, compared to its overall market share. It is the second biggest brand overall, and is second biggest or biggest in 11 of the 15 ACORN groups. There is one large deviation in this performance, whereby Nike enjoys 33 percent market share among the 'All Others' category. However, 'All Others' is a small, aggregated group

comprising 6 percent of total sales, and it may be that sampling error is causing at least part of this fluctuation, even with the large overall sample.

Umbro also appears to exhibit some different levels of brand performance, indicating some broad-based demographic segmentation. This is evidenced by its lower market share among two ACORN groups - 'Older People / Less Prosperous' and 'Prosperous Pensioners'. This indicates Umbro is somewhat less appealing to older people. That may reflect its traditional positioning and product range: perhaps older people are less likely to dress in football outfits. That said, Umbro still manages 7 percent market share in these two demographic groups compared to 11 percent overall. Reebok has more share in 'Council Estate – Great Hardship' with 29 percent market share compared to 21 percent in the overall buying population, but apart from that deviation, its performance is reasonably evenly spread across the other ACORN groups.

Once these deviations are noted, the overall pattern is that brand shares in almost all geo-demographic clusters are very similar to what they are in the wider population. Looking now at the smaller brands, Fila is the second smallest brand and has this status in almost every ACORN group. Diadora is the smallest brand, and is indeed the smallest brand in every ACORN group.

Summary

This study examined three key brand performance metrics in a product category that has received little research attention to date. Based on the characteristics of the brands, and commentary by other authors and experts, we may have expected some of the brands in this category to exhibit quite different patterns in brand performance metrics than has been reported in other published research. However, this was not the case. These

sportswear brands, among them some of the biggest and most successful consumer brands in the world, exhibit (a) 'polygamous loyalty' with buyers allocating a share of their requirements to them over time, as well as the double jeopardy effect; (b) sharing of customer purchases with other brands about in-line with the market share of those other competitor brands; and (c) approximately equal performance levels among demographic sub-groups – that is, the bigger brands tend to be big in all demographic groups and the smaller brands tend to be smaller in all demographic groups.

Management Implications

There are implications from this outcome for managers, as well as for market researchers. For researchers, this study highlights that brand performance needs to be analysed in context. One cannot interpret brand performance metrics such as loyalty or switching without recourse to the established patterns found over decades of academic research on the topic (listed in the introduction). The discussion of results also highlights a potential danger in focusing too much on differences in brand performance among buyer groups. A brand might well show higher or lower performance in a particular buyer group, but if that buyer group accounts for only a small proportion of total sales, it presents limited scope for action.

There are also several implications for brand managers. First, it seems apparent that in order for a brand to grow from a small brand to a larger brand, it will probably need to grow its market share 'across the board' – that is, increase its sales to a broad range of demographic groups. Focusing on one specific target group may be counterproductive, as it may actually limit the ability of the brand to grow. Managers should appreciate the

brands in their category will probably exhibit mild differential appeal across various buyer groups, but it is unlikely there will be brands that are massively popular in one part of the buying population and very unpopular in others. Managers also need to appreciate that their competitive set is broad – brands do not compete against one or two other brands in the market, they compete against all other brands, and it is the other largest brands that they share their customers with the most. Lastly, managers should not be perturbed that their customers only allocate a particular share of their category requirements to their brand. Even buyers of brands like Nike and Adidas give them (only) a *share* of their sportswear purchases over time. Finally, the 'double jeopardy' effect gives some context to the loyalty exhibited towards a brand. A manager of a small brand should not be perturbed that loyalty to their brand is somewhat lower than what it is for larger brands in the category. Likewise, a manager of a larger brand should not be too self-congratulatory that their brand achieves somewhat greater loyalty compared to its smaller competitors – this is to be expected and appears to be a natural outcome of having high market share.
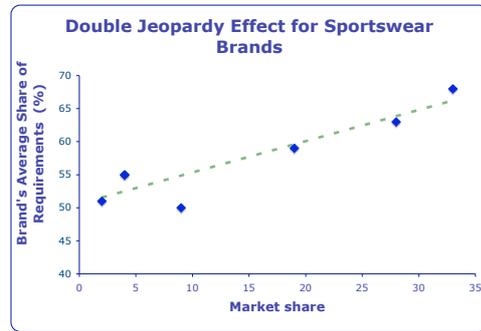
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Table 1: Market Share and Share of Requirements (analysis among 'singles' households).

Brand	Market share	Average Share of Requirements (SCR) over 12 months
Adidas	33	68
Nike	28	63
Reebok	19	59
Umbro	9	50
Puma	4	55
Fila	4	55
Diadora	2	51
Average		*57*

Double Jeopardy Effect for Sportswear Brands

Smaller sportswear brands enjoy somewhat less loyalty

Table 2: Cross-Purchasing Analysis (among Households classified as 'singles').

Brand	Market share	Share of Requirements of the *row* brand accounted for by this *column* brand						
		Adidas	Nike	Reebok	Umbro	Puma	Fila	Diadora
Adidas	*33*	*68*	14	8	5	2	2	1
Nike	*28*	18	*63*	9	6	2	2	1
Reebok	*19*	14	15	*59*	5	3	2	1
Umbro	*9*	21	16	9	*50*	2	3	0
Puma	*4*	13	13	11	4	*55*	3	1
Fila	*4*	12	10	10	8	4	*55*	2
Diadora	*2*	14	12	12	3	4	4	*51*
Average (not including diagonals)		**15**	**13**	**10**	**5**	**3**	**3**	**1**
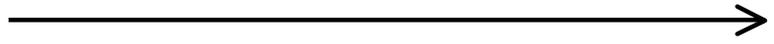
Buyers of any Sportswear brand allocate their purchases to other brands in-line with the size of those other brands

Table 3: Market shares split by presence / absence of children in Household.

	% of all sales *	Brand's Market share within this group						
Demographic group:		Adidas	Nike	Reebok	Umbro	Puma	Fila	Diadora
All buyers	100	33	23	21	11	6	4	1
HH with no children	38	32	27	22	9	6	4	1
HH with one child	26	35	20	22	12	6	4	1
HH with > one child	36	34	19	22	12	7	4	2
Average deviation from overall share across the household groups		1	3	1	2	1	0	<1

* this column represents the percentage of total sales accounted for by this social class group. For example 38 % of all sportswear sales to these 7 brands came from households with no children

Table 4: Market Shares split by Social Class.

	% of sales *		Brand's Market share within this group						
Demographic group:			Adidas	Nike	Reebok	Umbro	Puma	Fila	Diadora
All buyers	100		33	23	21	11	6	4	1
AB Households	15		33	25	24	8	5	3	2
C1 Households	26		29	28	21	11	6	3	1
C2 Households	32		34	23	20	10	6	5	2
D Households	19		36	21	20	11	7	4	1
E Households	8		39	18	17	13	7	5	1
Average deviation from overall share across the social class groups			3	3	2	1	0	1	0

* this column represents the percentage of total sales accounted for by this social class group. For example 15 % of all sportswear sales to these 7 brands came from social class AB.

Table 5. Brand Performance split by ACORN cluster

ACORN cluster	% of total sales*	Brand's Market share within this group						
		Adidas	Nike	Reebok	Umbro	Puma	Fila	Diadora
All buyers	100	33	23	21	11	6	4	1
Council Estate Better-Off	15	33	24	22	9	7	4	1
Skilled Workers/Home Owning	14	35	23	21	11	6	4	1
Comfy Mid-Agers/Mature Home Owners	12	33	23	23	11	5	4	1
New Home Owners/Mature Communities	11	39	20	18	12	5	4	2
Well-Off Workers/Family Areas	11	35	22	20	12	7	3	1
Wealthy Achievers/Suburban area	10	30	25	23	10	7	5	1
White Collar/Better Off Multi-Ethnic area	4	28	29	25	11	3	4	2
Affluent Executives/FamilyArea	3	35	22	20	11	9	2	1
Older People/Less Prosperous	3	40	19	21	7	9	3	1
Council Estate Great Hardship	3	29	18	29	8	7	9	1
Council Estate High Unemployment	2	28	27	25	10	6	2	2
Better-Off Execs/Inner City	2	22	29	25	10	9	5	1
Prosperous Professionals/Metro area	2	27	27	25	10	7	3	1
Prosperous Pensioners/Retired	2	29	23	26	7	6	6	1
All Other / Not specified	6	31	33	17	10	3	4	2
Average deviation from overall market share across the ACORN groups		4	3	3	1	1	1	<1

this is the percentage of sales for all brands accounted for by this ACORN cluster