

NPD: Specialty Stores Expand Apparel Share

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Specialty stores gained apparel market share at the expense of mass merchants during the 12 months through February, as consumers began to place more emphasis on fashion in their revised definition of value.

According to a study released Tuesday by market research firm The NPD Group, specialty stores expanded their dollar share of the apparel market 1.3 points to 32.4 percent, up from 31.1 percent during the 12 months ended in February 2010. During the same interval, mass merchants saw their share of the U.S. apparel market drop to 19.8 percent, off 1.6 points from 21.4 percent.

Department stores and national chains again finished third and fourth on the list of the most popular distribution channels for apparel purchases. Department stores were off 0.1 points to 13.3 percent from 13.4 percent in the earlier period, while national chains advanced the same amount, coming in at 13 percent from 12.9 percent. Off-price retailers maintained their 9.4 percent share of apparel dollars in the year-on-year comparison.

"What these numbers show is that the consumer is seeking 'value,' and 'value' in the context of their new value equation," said Marshal Cohen, chief industry analyst for NPD. "They are looking for product that is priced right and does more than last a week or a wearing or two. And consumers are looking for fashion again, and looks that feel and look right, and are willing to pay a little more for it."

Other channels monitored by NPD were direct mail and e-tail pure plays (5.4 percent versus 5.5 percent) and factory outlets (2 percent versus 1.8 percent).

By gender, specialty stores stretched their dominant share of women's apparel purchases 1.8 points to 36.3 percent, versus 34.5 percent a year earlier, while mass merchants lost 1.2 points, dropping to 15.8 percent from 17 percent. Changes in men's wear share were less pronounced, with specialty stores down 0.1 points to 28.9 percent and mass merchants down 0.9 points to 18.3 percent. Off-price and outlet retailers both expanded their share of men's wear dollars 0.4 points, to 5.9 percent and 2.9 percent, respectively.

NPD didn't provide total volume figures for the period studied. Previously, it reported that overall apparel sales last year grew 1.9 percent to \$192.73 billion, with women's up 2.9 percent to \$107.61 billion, men's up 3.3 percent to \$52.82 billion and children's down 3.6 percent to \$32.3 billion.

Cohen allowed that higher gas prices are costing consumers an additional \$10 a week, but said that won't deter customers from seeking purchases of merchandise that is "new, exciting and innovative."

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