

# INSIGHTS

## ATHLETIC SOCKS — A COTTON OPPORTUNITY



Accounting for 43% of the total sock offerings at U.S. retailers, athletic socks are gaining attention from industry and consumers. Consumers now view socks as “equipment” and choose socks that enhance their athletic performance. Major athletic brands have capitalized on this trend by expanding their product lines to include performance socks. Following recent trends in athletic apparel, retail offerings of athletic socks have shifted towards synthetic fibers—according to data from Cotton Incorporated’s Retail Monitor™, the percentage of cotton-dominant (51%–100% cotton) athletic socks in stores declined from 46% in 2007 to 34% in 2009. This trend runs counter to consumers’ preference for cotton in athletic socks, expressed in recent consumer surveys and wear tests.

### HOW CONSUMERS SHOP FOR ATHLETIC SOCKS

When shopping for athletic socks, consumers evaluate fit and/or comfort before all other qualities, including price and brand. Advertising campaigns showcasing celebrities or pro athletes’ choices in socks have the least influence on purchase decisions. Instead, the technical aspects of high-performance athletic socks, including functionality, durability, and extra cushioning, have a greater impact. Notably, consumers prefer cotton fibers over synthetic fibers in socks.

### FIT, COMFORT & PERFORMANCE DRIVE PURCHASES

Relative importance based on maximum difference scaling

Most important	Fit / Comfort
	Overall functionality or performance
	Durability
	Sock style
	Extra cushioning
	Price
	Made with cotton
	Reinforced heel and/or toe
	Breathability
	Arch support
	Color
	Brand name
	Made with synthetic fibers
Least important	Worn by pro athletes or celebrities

*Cotton Incorporated’s 2008 Consumer Athletic Sock Study*

### PREFERRED STYLES OF ATHLETIC SOCKS

% of athletic sock purchasers responding\*



	Ankle/quarter	Crew/cuff	Low-cut/footie	No-show/foot liner/cover	Tube/knee-high/over-the-calf
Avid athletes	38	25	20	12	5
Moderate athletes	26	36	14	16	7
Total	34	29	17	14	6

\*Respondents who indicated no style preference are not included.  
*Cotton Incorporated’s 2008 Consumer Athletic Sock Study*

About 63% of consumers prefer ankle and crew socks, making them the two most popular styles of athletic socks. Specifically, avid athletes (those who work out four days a week or more) favor ankle socks (38%), while moderate athletes (those who work out less than four days a week) prefer crew socks (36%). Socks are most often purchased in packages of six pairs (48%) or three pairs (22%). Although other factors trump price in consumers’ purchase decisions, the majority of consumers (68%) buy most of their athletic socks at mass merchants. Chain stores (38%) and sporting-goods stores (28%) are the next most popular retail channels. Avid athletes are more likely than moderate athletes to purchase socks at sporting-goods stores, where they shop for more specialized athletic gear.

### KEY INSIGHTS

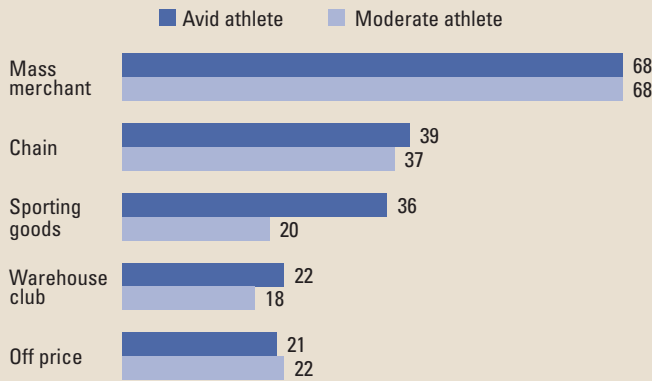
- Although the share of cotton-dominant socks in the athletic-sock market has declined, most consumers prefer athletic socks made of cotton or cotton blends.
- Purchases of athletic socks are driven by fit and comfort, overall functionality or performance, durability, style, and price.
- Consumers who wear-tested cotton athletic socks treated for moisture management rated them highly for comfort, absorbency, and breathability.
- Consumers’ preferences for cotton athletic socks, especially among avid athletes, runs counter to the retail trend towards synthetics — suggesting a market opportunity for cotton athletic socks with performance features.



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## TOP RETAIL CHANNELS FOR ATHLETIC SOCKS

% who most often buy athletic socks at the retail channel\*



\*Consumers could cite more than one channel.  
Cotton Incorporated's 2008 Consumer Athletic Sock Study

## FACTORING IN FEATURES

According to the Retail Monitor, nearly half (48%) of athletic socks in the retail market offer at least one feature designed to enhance the wearer's comfort and performance. The three most common technical features are moisture wicking (offered in 47% of the socks), followed by anti-microbial properties (24%), and odor resistance (14%). Both avid and moderate athletes show high awareness of available performance features. However, given their strong focus on functionality, avid athletes show higher awareness and are more likely to purchase socks with performance features. Although awareness does not always translate into purchases, the percentage of avid athletes who have historically or recently purchased socks with a given feature roughly tracks their level of awareness of the feature—76% of avid athletes are aware of athletic socks with moisture wicking, and nearly half (44%) have purchased socks with that property.

## AVID ATHLETES: AWARE OF PERFORMANCE

% who are aware of or have purchased socks with the feature;  
% of socks offered at retail that have the feature

Feature	Aware of	Ever purchased	Offered at retail
Moisture wicking	76	44	47
Odor resistant	68	25	14
Anti-microbial	56	18	24
Temperature control	56	18	3
Blister control	40	11	5
Stain resistant	38	11	1
Ventilated	36	14	1

Cotton Incorporated's 2009 Athletic Socks Wear Test  
Cotton Incorporated's Retail Monitor™

## WEAR TEST PROVES COTTON PERFORMANCE

According to results from Cotton Incorporated's 2009 Athletic Socks Wear Test, more than 90% of respondents expressed a preference for cotton or cotton blends in athletic socks. Consumers do not just say they want cotton—when given the option, they actively choose cotton. In a three-week blind wear test comparing the performance of three types of socks—cotton-dominant socks treated with a moisture-management finish, untreated cotton-dominant socks, and synthetic-fiber socks—respondents were asked to rate the socks' performance during exercise before and after laundering. When asked what they liked most about the cotton socks, they cited comfort, softness, fit, and moisture management. In comparisons with synthetic socks, significantly more consumers rated the treated cotton socks as very comfortable, effective at moisture management, and breathable, and all of these positive qualities held up through repeated wearings and launderings. When respondents were asked whether they would purchase the socks they had tested, avid athletes were significantly more likely to say they would buy the treated cotton socks than the synthetics.

For consumers who exercise regularly, athletic socks are not an afterthought, but a necessity, and when given a choice, consumers prefer cotton on their feet. Given that comfort, fit, and functionality are key purchase drivers for athletic socks, consumers are trending towards cotton or cotton blends, because they appreciate the qualities afforded by natural cotton fiber. Avid athletes, who are the innovators of the athletic-sock market, express a clear preference for cotton's comfort and performance. However, synthetic fiber currently has a large presence in the sock market. As a result, current retail offerings fail to reflect consumer preference—indicating an unmet need and a market opportunity for high-performance cotton athletic socks.

### About the Research

Cotton Incorporated's **2008 Consumer Athletic Sock Survey** was conducted via the Internet by Bellomy Research, Inc., in a nationwide sample of consumers aged 13 to 60, 50% female and 50% male, who had purchased athletic socks in the past six months. Cotton Incorporated's **2009 Athletic Socks Wear Test** was conducted by Bellomy Research, Inc., in a nationwide sample of consumers aged 21 to 60, 48% female and 52% male, who were recruited via the Internet to participate in a three-week wear test of athletic socks and complete an Internet survey. The samples for both studies were representative of the U.S. population based on the ethnicity, income, education, and geography. In both studies, comparisons were made between consumers who exercised at least four days a week ("avid athletes") and those who exercised less than four days a week ("moderate athletes").

