

APRIL 2010 VOLUME 5 | ISSUE 4

PSR

NEWS & INFORMATION FOR THE RUNNING & TRIATHLON MARKET



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PERFORMANCE SPORTS RETAILER, Volume 5, Issue 4, is published monthly by SportsOneSource, LLC, 2151 Hawkins Street, Suite 200, Charlotte, NC 28203; 704-987-3450. Subscription: one year, \$99.00 (U.S. funds) in the U.S. and its possessions; Canada and Mexico, \$149.00 (U.S. funds); all other foreign delivery, \$249.00 (U.S. funds); Printed in USA. Postage paid at Charlotte, NC and additional locations. POSTMASTER: Send address changes to PERFORMANCE SPORTS RETAILER, 2151 HAWKINS STREET, SUITE 200, CHARLOTTE, NC 28203; 704-987-3450.

IRONMAN RULE CHANGES SPARK CONTROVERSY AMONG COMPETITORS

It's happening again. Similar to FINA's decision last summer regarding swimwear in international competition, the World Triathlon Corporation's new rule changes for wetsuits – set to take effect this September – are designed to level the playing field and standardize rules for all global competitions.

The changes, which apply to all Ironman and Ironman 70.3 events, involve the water temperature at which a competitor can wear a wetsuit, the elimination of swimskins in non-wetsuit legal swims and legal materials for those suits.

Here's the breakdown. Wetsuits may be worn in water temperatures up to, and including, 24.5 degrees Celsius / 76.1 degrees Fahrenheit. Any athlete choosing to wear a wetsuit in water temperatures exceeding that temperature will not be eligible for awards, including World Championship slots. Wetsuits will be prohibited in water temperatures greater than 28.8 degrees C / 84 degrees F.

Ironman's Head of Officials Jimmy Riccitello believes the rules are only fair. "We believe these amendments place more emphasis on performance and function and less on technology, therefore staying true with the Ironman spirit."

In addition, the new rules say that all swim apparel must consist of 100-percent textile material such as nylon or Lycra, and may not cover the neck or extend beyond a swimmer's shoulders or knees. Competitors are allowed zippers and can wear tri-suits underneath their swimwear.

Finally, swimsuits may not contain any rubber, polyurethane or neoprene material, and wetsuits may not exceed 5 millimeters in thickness.

While it appears that Ironman's intentions on swimskins sought to mimic FINA's rules on racing apparel, the regulations seem to mirror the governing body's rules on pool swimming. It didn't take into account the drastic difference between FINA's more relaxed rules on open-water swimming.

"For any particular event, a race director may request from USA Triathlon a specific exception or addition to these rules and all requests for rule changes must be made in writing," Charlie Crawford, USA Triathlon's commissioner of officials says, referencing article 1.4 of the ruling.

Crawford says Ironman submitted a "long list" of exceptions in January, and that the aforementioned rules were accepted by the USAT shortly thereafter. He expects Ironman's race directors to adhere to their own rules within compliance of USAT standards.

Most of the concerns stem from competitors who have already purchased De Soto's Water Rover, a \$600 wetsuit with side panels that exceeded the 5-millimeter cap on thickness. While USAT will allow it, competitors may not use it in Ironman-sponsored events. "The recent ban of the T1 Water Rover by WTC in its 20 races is trivial," says Emilio Desoto, founder, president and designer of the Desoto Water Rover. "There are over 3,000 races in the United States where it is legal. The most intelligent people in our sport can figure this out."

Desoto speculates that Ironman's decision to ban wetsuits that exceeded 5 millimeters in thickness was made because the company couldn't design something better – an "if you can't beat em', make it illegal" proposition. "How will this affect us – not very much," he says. "I don't care what Ironman does."



PUMA LOOKS TO DECREASE ENVIRONMENTAL 'PAW' PRINT



In a move that could revolutionize the way footwear and apparel is packaged and shipped, Puma is embarking on the next phase of its long-term sustainability program. Called "Clever Little Bag," the initiative is set for the second half of 2011. The bag will replace the cardboard shoebox that accounts for 65 percent of Puma's paper usage. The new re-usable bag will house each pair of shoes from the manufacturer to the point of sale.

Puma also plans to reduce its usage of water, energy and diesel consumption within the manufacturing phase by more than 60 percent annually. That's an annual savings of nearly 8,500 tons less paper, 20 million mega joules of electricity, 1 million liters of fuel and 1 million liters of water.

Set for completion by 2015, the program is part of Puma's goal to reduce company-wide carbon, energy, water and waste by 25 percent, and adhere to its sustainability standards with 50 percent of its international products.

Along with footwear, Puma's apparel division also is going green. Apparel will be bagged with sustainable materials, replacing the current polyethylene bags. The move will save the company 720 tons of poly material – or enough plastic to cover 1,000 soccer fields.

Puma also is using space saving methods during shipping. For example, it will fold T-shirts an additional time, which ultimately will result in fewer shipments. Puma plans to replace the plastic bags in its retail locations with sustainable, biodegradable bags that could save approximately 192 tons of plastic and 293 tons of paper annually.

RUNNING COMMUNITY WIDELY REPRESENTED AMONG SGB 40 UNDER 40 AWARDS



A number of young turks in the running community were selected as part of the third annual SGB 40 Under 40 awards for 2010. These included Robyn Goby, director of marketing and communication, Fleet Feet; Parks Robinson, owner/general manager, Fit 2 Run; Dan Sullivan, footwear product, Saucony; and Thac Lecong, general merchandise manager, Frontrunners.

Others in the footwear industry garnering recognition include: Angela Dominick, buyer, women's footwear, Dick's Sporting Goods; Ronnie Jefferson, division merchandise manager for life-style footwear, Finish Line; Todd Krinsky, vice president, sports and entertainment marketing, Reebok International; Jonathan Lantz, president, La Sportiva N.A.; Jason Lutz, founder, Sneaker Villa; Marshall Merriam, footwear buyer, Eastern Mountain Sports; Christopher Peake, senior buyer, Zappos.com; Craig Throne, vice president of marketing, outdoor group/Wolverine WorldWide; and Jon Vacca, vice president of customer relations & credit, Puma North America.

The recipients were selected from a list of more than 300 nominations by a panel of SportsOneSource analysts and editors, and a team of industry executives. They will be honored during a week-end event in South Beach Miami, FL, May 21-23, 2010.





DICK'S TO LAUNCH 'NATIONAL RUNNERS' MONTH' IN MAY

At Dick's Sporting Goods, it's all about the runners. To cater to the sport's renewed growth, the retailer is turning May into "Dick's Sporting Goods National Runners' Month." The month-long celebration of all things running kicks off at the Alexandria Running Festival in Washington, D.C., May 2, and culminates at the Starlight Run in Portland, OR., June 5.

Overall, Dick's has scheduled 10 events that could target approximately 75,000 participants. The goal: position itself as a running authority. "There is a real need to make sure [our] associates can speak to the different products," says Jeff Hennion, executive VP and chief marketing officer for Dick's. "Just as specialty running shops offer advice as to the proper fit for running footwear, [we] hope to provide the same experience to customers."

To help bolster the events, Dick's is working with several key partners and employing a series of marketing approaches, including in-store promotions. For starters, Dick's has enlisted the help of running legends Dean Karnazes (known as the Ultramarathon Man and one of Time magazine's 100 Most Influential People) and Bart Yasso (noted runner and chief running officer for Runner's World magazine). Both will serve as ambassadors to the sport during the month.

The retailer also is teaming with Michael J. Fox Foundation's Team Fox, which will serve as the campaign's official charity partner and beneficiary. Dick's initially agreed to donate \$50,000 to Team Fox, and will encourage individual fundraising via the Web, social media and Team Fox's large community of members.

On the marketing side, Dick's will employ a special event Web site, national advertising, social media and a new running-related iPhone application available through Apple's App Store. It also will rely heavily on consumer support from its Facebook fan page. Hennion says its Facebook fan base has grown from 7,000 to around 70,000.

NUUN & CO ADDS TWO SALES SPECIALISTS

NUUN & Co, the hydration tablets specialists, have added two new senior members to its sales team, including Jeff Dean as director of specialty sales, and Scott Schilter as manager of run/tri/outdoors.

SAUCONY INKS DECORATED SPRINTER TO ENDORSEMENT DEAL

Saucony, Inc. has signed world champion sprinter and two-time U.S. Olympian Lauryn Williams to a multi-year endorsement contract. Known as one of the fastest women in the world, she also is recognized for her passion for charitable giving. In 2009, Williams was honored with the Jefferson Award for Public Service. She also was awarded the USA Track and Field Humanitarian of the Year Award in 2006.

ASICS LAUNCHES 'LIVE RUNNING' CAST

ASICS launched its first "Live Running Casting," which was held during the 2010 Paris Marathon on April 11. The race featured more than 1,500 women – or 25 percent of the marathon's female runners – registered for the event. ASICS' 'Live Running Casting' was organized so that the company could find the face of its Spring-Summer 2011 multi-media campaign for the AYAMi women's running collection.

64

The percentage of running footwear dollar sales that Nike accounts for in the 2010 year-to-date period

Did you know?

The average selling price of Nike running footwear for the 2010 year-to-date period

\$80.37

Reebok's Running Footwear dollar sales have more than doubled for the 2010 year-to-date period compared to the same time period in 2009.

Did you know?

8

Over half of all dollars shelled out on running footwear for the 2010 year-to-date period were spent in athletic/urban specialty retailers.

The percentage dollar sales growth of the running footwear market for the 2010 year-to-date period

SGB UNDER FORTY AWARDS 2010

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VP of Product
Saucony

BROOKS LOOKS TO BECOME NEXT BILLION DOLLAR RUNNING BRAND

By Tom Ryan





Jim Weber, Brooks' president and CEO,

The goal was simple. Brooks Sports is embarking on a bold 10-year plan to reach a billion dollars in sales by 2020. Last year, it did about \$200 million globally. While expecting to benefit from the running category's continuing momentum, Brooks plans to make significant investments in product and marketing.

THE MISSION: "OWN" THE RUN CATEGORY.

"We think we're at a unique time in the industry," Jim Weber, Brooks' president and CEO, told PSR in an exclusive interview. "The opportunity to build our brand is wide open. Our strategic plan is to be the leading brand in the running category. That doesn't mean the biggest, but we're going to define what leading means."

Leading the way means expanding its resources. So, with support of parent company Berkshire Hathaway, Brooks grew its 2010 marketing budget 42 percent, R&D expenses 33 percent, and sales development spending/promotions 21 percent.

Like many companies during this economic downturn, Brooks rethought its business model in 2009. While the brand benefited from its decision to focus solely on performance running in 2000-2001, Weber felt the message wasn't being projected as strongly over the past few years, especially as new running brands entered the market. So Brooks decided to become "more aggressive in leading the pack." That means capitalizing on its unique position as the only brand focused solely on running and the running community.

"Running is all we do," Weber says. "It's in our DNA. We're the only brand where it's our complete focus."

Overall, Weber says there are three growth drivers:

- the running market's strength
- product innovation
- a run-centric marketing positioning.

The category is strong, including 90 million runners worldwide (42.1 million in the U.S.) and an 11 percent increase in road race participation last year. And there's more good news on the way. Weber says that 60 percent of runners didn't run a race, while a bevy of new runners are taking to the activity, thanks to a growing health and wellness movement.

"It's less of a sport than a fitness activity," Weber says. "Although sport is an important part of it, the activity is capturing lots of people."

There's also strength in the specialty run channel, which grew 7 percent last year, to \$682 million, despite the downturn. The number greatly exceeded the estimated \$200 million level at the start of the

decade. "This channel is very healthy," Weber says, echoing the comments of members of the IRRRA, who believe run specialty can be a billion dollar channel.

At Brooks, there have been a number of successes over the past several years, including growing top-line growth, increasing "shoe counts" at major marathons, gains in Runner's World's "Last Shoe Purchased" survey, more review awards, and market share gains in Specialty Running Accounts.

Weber says this gives Brooks increasing credibility with influencers in the run category. "We're not going to be a marketing-driven brand, where we'll run a couple hundred million in TV commercials to convince people we're cool. We're always going to work on the most discerning people in the business, whether they're SRA owners, [sales] clerks who can sell any shoe they want to that day, coaches, podiatrists, sports medicine professionals, etc. We want those people to respect our product as a shoe that's going to work and perform. The neat thing about this business is that you'll know within two weeks after a shoe is launched whether it's working."

INNOVATION IS KEY

The key to making continued strides is innovation. "Our footwear has never been better," Weber says. "The way I describe it is that we have doubled down on the science." Take its DNA technology, its first patent since Hydroflo. The technology – and others – is expected to open up opportunities as it rolls across its brands (see Run, Baby, Run, page 12). And the look of the product also is receiving greater attention.

"I think in any brand leader, great product should not only work, but should look fantastic," Weber says. "Form follows function. So, it's coming from purposeful function, but we're really challenging



ourselves to step out. Part of the reason is all the noise in the marketplace. There's so much product out there, and everybody's copying everybody, so we're pushing ourselves to step out in design, materials and aesthetic."

On the branding front, Weber says many brands come from an athletic or outdoor heritage. As such, Brooks plans to further capitalize on its distinct sole running focus. Moreover, he believes its "Run Happy" campaign, which celebrates the running spirit, is more closely aligned to the running culture.

"It isn't a football field," he says. "It isn't a baseball diamond. It's standing at the start of the New York or Chicago marathons, or even the St. Paddy's Dash in Seattle with 15,000 to 20,000 people running down a 3-mile hill for green beer. When you look at the energy and flavors of people, and why they're running, that's what Run Happy is about. We're bringing that authenticity, that kind of fun and spirited approach to it."

On the marketing side, the Run Happy mantra is reflected in its new sponsorship of the Rock n' Roll Marathon series. It also shows up in various antics played out across road races. For example, recognizing that the Porta Potty was one of the most dreaded experience for nearly all runners at a road race, Brooks introduced its "VIP Porta Potty." Anyone wearing Brooks gear can use a posh bathroom in a heated trailer, with Brooks' employees in faux-tuxedo T-shirts guiding the events. "We started it at the Marine Corps Marathon, and now it's a phenomenon," Weber says.

At the recent Chicago Marathon, Brooks introduced the BRASH Tent – a play on the old M*A*S*H television series. Runners were wheeled around in gurneys, received dog tags and given chances for prizes for undergoing a gait analysis. A local comedian even mimicked series character Radar on the intercom. Some 700 runners underwent a gait analysis during the two-day event.

"I was standing by watching the whole BRASH tent event, and this guy says to his wife, 'Come here. You got to see this. Every event we go to these guys are doing something weird,' " Weber says. "That's exactly what we're looking for. We're bringing it alive."



MAKING ITS RUN

Ask Jim Weber and he'll tell you that the near-term goal for Brooks is to become the No. 1 brand in the SRA channel. Year-to-date, Asics has a market share of 25 percent in SRA vs. 21 percent for Brooks. Among national accounts, Brooks is the sixth largest performance running brand. Among national accounts, the leader is Nike (41%), followed by Asics (28%); New Balance (10%); Saucony (5%); Adidas (4%) and Brooks (3%).

"We're already there in specialty, but in better sporting goods, and the right retailers and other venues, we want to be the No. 3 brand," says Weber, Brooks' president and CEO. "We're not going to put [Nike and Asics] out of business, but I think with a run focus we can get to No. 3."

Weber believes that growth can come outside the U.S., too, where sales accounts for nearly 40 percent of its business. Brooks remains the leading brand in Australia, with strong footholds in Europe

and Canada. Subsidiaries also opened up over the past decade in the U.K., while Germany continues to be successful. The brand also recently was re-launched in Japan and is making inroads in Korea, China, Israel and Pakistan. It also recently entered South America and Mexico.

The 10-year growth plan comes on the heels of Brooks' mid-single digit gain in a tough 2009 market. Through early April, U.S. footwear is up over 25 percent, with the backlog for the balance of the year up double-digits. "The momentum we have has never been stronger," Weber says. "What's most exciting for us is it's our best shoes. It's in the new Glycerin and the Adrenaline. It's in the core of our performance running offering. In the past, we have had motion control shoes – the Beast and Addiction – that have been huge franchises for us. They still are. But this growth is being driven by neutral and stability, which is where the core of the market is."



RUN, BABY, RUN . . .

By Michael Pallerino

Sell running shoes, apparel and accessories to today's technologically savvy runner. That's what Brooks does. So what do you do when the student starts getting as astute as the teacher when it comes to understanding the product – or at least thinks he does? If you're Brooks, you join forces with two of the world's leading biomechanics researchers and dedicate your resources to helping elevate the research and development standards for everybody.

Professors Dr. Gert-Peter Brüggemann and Dr. Joseph Hamill are teaming with Brooks to conduct major retrospective and prospective studies designed to influence footwear design. As part of the studies, they will examine large sects of runners to enhance their respective knowledge of running motion, and how to better determine the individual footwear needs of different types of runners.

With more than 20 years experience apiece, both have published more than 200 journal articles on everything from human motion, to biomechanics, to running, to injury

prevention and footwear, and performance enhancement. Today, Brüggemann directs the Institute of Biomechanics and Orthopaedics at the German Sport University in Cologne, Germany, while Hamill serves as a professor in the Department of Kinesiology at the University of Massachusetts Amherst.

PSR caught up with them to get their take on today's runners and how the newly formed partnership will help build a foundation for the market in general.

PSR: WHAT ARE SOME OF THE KEY DIFFERENCES THAT YOU SEE IN RUNNERS TODAY AS COMPARED TO WHEN YOU STARTED OUT 20 YEARS AGO?

HAMILL: Runners today are much more technologically savvy than they were. When they go to a store to purchase a shoe, they generally know what type they should be in. They [most likely] know more about their own preferred workout speed and performance speed. They know more about how to train – just overall, more about themselves. They are also influenced by different styles of running today, styles such as running barefoot, pose running and Chi running [even though they may be fads].

Today, they are getting their information from a number of sources, including popular running magazines. That's where many runners get the information they need. There are also more technical running stores, which continue to get more technologically savvy about the sport and what's needed.

BRÜGGEMANN: Another difference is that a part of this new population of runners is less prepared to run. There are a lot of people out there who started running later in life. They entered the sport when they were 40 or older. That's different. They know about technology. They know about shoes. But they don't have the history of physical preparation.

PSR: WHAT SHOULD THE ROLE OF THE SPECIALTY RUNNING STORE (AND OTHER TYPES OF RETAILERS) BE WHEN IT COMES TO EDUCATING TODAY'S RUNNERS?

HAMILL: The people in the tech running stores have to be very aware of what's happening in the market. It's a two-way street, really. The person coming into the store has to know more about how their body works. How do I run, etc.? But the salesperson has to know more about the different types of footwear out there and which styles go with whom. One of my hobbies is to hang around tech running stores. And what I see, quite honestly, is that sometimes the salesperson

puts a runner in the wrong shoe. These are typically the more novice salespeople, but it still happens.

[Remember] running shoes are a possible risk factor for injury. But they are not "the" risk factor for injury. If you combine improper training with the wrong running shoe, you may end up with an injury. It's very important for the person to get into the right running shoe – and it's a salesperson's job to know how to do it.

BRÜGGEMANN: I agree. It's a challenge for the running storeowner to always have the right person there to consult a customer. But you need to be much more educated on what a person needs. They [sales associates] must be re-educated on all the news and trends that are happening relating to training and technology, and the relationship between technology and the mechanics of the human body. So, yes, it's a challenge to be knowledgeable about everything that's out there, and to sell shoes today.

PSR: WHAT ADVICE WOULD YOU GIVE A SALES ASSOCIATE ON THE FLOOR TODAY?

HAMILL: You have to listen to the representatives from the footwear companies. What are the shoes for? Who should be wearing them? And who shouldn't be? You have to know a little bit about the person's running style. Is the person is a heel/toe runner? Is he a mid-foot striker? A forefoot striker? Does he have a stable foot or an unstable foot? It's not that you have to know everything, per se, but have to know the right questions to ask with the particular answers given.

You should also look at the old shoes the runner was wearing – look at the sole, look at the wear and tear patterns. This will give you an idea of the type of runner this person is.

BRÜGGEMANN: You must also know the relationship between the material of the shoe and the human foot. This is not an easy task, because you have to know about technology, biology and biomechanics. If you can understand these things, you will be able to consult a runner much better than you did.

INSIDE THE BROOKS PARTNERSHIP

Along with supplementing Brooks' internal Biomechanics Research Lab capabilities, professors Gert-Peter Brüggemann and Joseph Hamill have each established labs at their respective universities.

These labs feature state-of-the-art motion analysis, extensive 3D running biomechanical analysis and the ability to measure muscle activity and energy consumption along with motion and forces. They also will employ state-of-the-art computer modeling capabilities and use these models to expand knowledge relative to the design effects of footwear.

Andre Kriwet, director of footwear merchandising, and Derek Campbell, future concepts manager, told PSR that the partnership is designed to align the respective biomechanical points of view from the professors and the Brooks team, and that they are using the right protocols; provide critical analysis and research to the Brooks designers; and create long-term studies that will become a vacuum of information for the overall running community.

"There's a vacuum of information out there right now, especially of long-term information following on what really happens to runners," Campbell says. "A lot of what people are pitching out there about injury prevention is theoretical, not true, actual solutions. We really want to start filling the void that's out there and start putting some research behind this, instead of all the information you see that really doesn't have any basis behind it. This will help runners understand what they should be worried or concerned about, and not being chasing the latest fad."

Did you know?

Brooks' Running Footwear dollar sales have increased by nearly 20 percent for the 2010 year-to-date period.

\$73.48

The average selling price of Brooks' running footwear for the 2010 year-to-date period

I AM...PSR



Chet with wife Judy and children Karsten and Chase at the Brandenburg Gate Berlin, Germany Summer, 2008

CHET JAMES Owner, Super Jock 'n Jill, Greenlake, WA

HOW DID YOUR MOM LAUNCH THE STORE? During my senior year in high school, my fourth brother's middle school cross-country coach came by for dinner and eventually moved into our basement. His name was Pat Tyson, who is now the track coach at Gonzaga University. He had been Steve Prefontaine's roommate at the University of Oregon. Pre would stay with us while doing assemblies for Pat's school. By the summer of 1975, our family was into running hook, line and sinker. The news of Steve's death shocked us all. Because of Pre's and Tyson's influence, Laurel, a single parent, decided she was going to start a running store. She opened in November of that year.

WHAT DID YOU WANT TO BE WHEN YOU WERE YOUNG? I always wanted to be in the Olympics. My dad was a pilot in the Air Force, which meant we moved quite a bit. Being a shy new kid and being fast really breaks the ice. Also, growing up with four other brothers keeps you pretty competitive.

WERE YOU A GOOD ATHLETE? I played a lot of baseball in California and Florida, and ran track as I got older. By the time I finished high school, I had torn my ACL and PCL on my right knee playing football. Being very active, I still ran track, played a lot of basketball and started playing indoor volleyball. By the time I was 23, I had ruptured my ACL two more times. So rehabbing a knee was becoming routine. In fact, having so many issues with my knee probably was one of the most important factors molding the direction of the store and myself.

WHEN DID YOU START WORKING AT THE STORE? Even though college was a two-hour drive, I'd come back during weekends to help with the store. When I finished with an education degree with classes in kinesiology, I helped manage and buy product. I was pretty young, but I was given a lot of latitude

with running the store. Not having a written set of rules really helped me. And it helped the store develop its personality. By this time, Nike hired my oldest brother, Brent, as a footwear developer. That gave us huge insight into how shoes were built – start to finish. And because we were one of the first running specialty retailers, and had a working knowledge of shoe design, I began attending biomechanical labs at the University of Michigan, University of California Davis, Nike, Adidas and Reebok. They were just starting to use videotape and reflective dots for analyzing running gaits.

WHAT DO YOU DO FOR FUN THESE DAYS? I love spending time with my wife, Judy, and my two boys, Karsten, and Chase. I do a lot of cycling. I still enjoy working with customers and our staff.

DREAM VACATION? Riding through the Alps and Pyrenees with a great bike – and my Visa card.

FAVORITE SUPERHERO? Flash. Just being able to run that fast would be great.

FAVORITE STORY ABOUT YOUR MOM? LJ (Mom), Brent and I were all attending a Chicago trade show, and somehow we all had gotten separated soon after arriving at O'Hare airport. This was before everyone had cell phones. We had just gotten separated. Brent was at one end of the airport; I was at the other; and LJ was somewhere in the middle. LJ has this obnoxiously loud whistle that she always used to get our attention. Its real meaning was, "Get your butt home now." I hadn't heard it for years, but boy did it work at O'Hare. Out went the "whistle," snap went our heads and damn if I didn't instantly see my brother and LJ. It still worked well into our late 20s.

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