

BESPOKE SURVEYS

US Footwear Vol 23

1250+ Consumers Per Wave

CHECK BREAKDOWN:**TREND CHECKS****ONLINE AND DIRECT TRENDS**

Preferences have shifted in the direction of retailers vs. brand direct more recently (though brand direct has gained over a longer time horizon). Preferences have gradually moved over time towards online with fairly steady trends q/q.

ONLINE AND DIRECT BUYERS ARE YOUNGER

Consumers who prefer to buy footwear online and direct skew younger.

BRAND AND RETAILER SPECIFIC FEEDBACK

Nike continues to outperform peers on a number of fronts including future purchase intentions. Skechers has shown some strength more recently (though is still behind Nike).

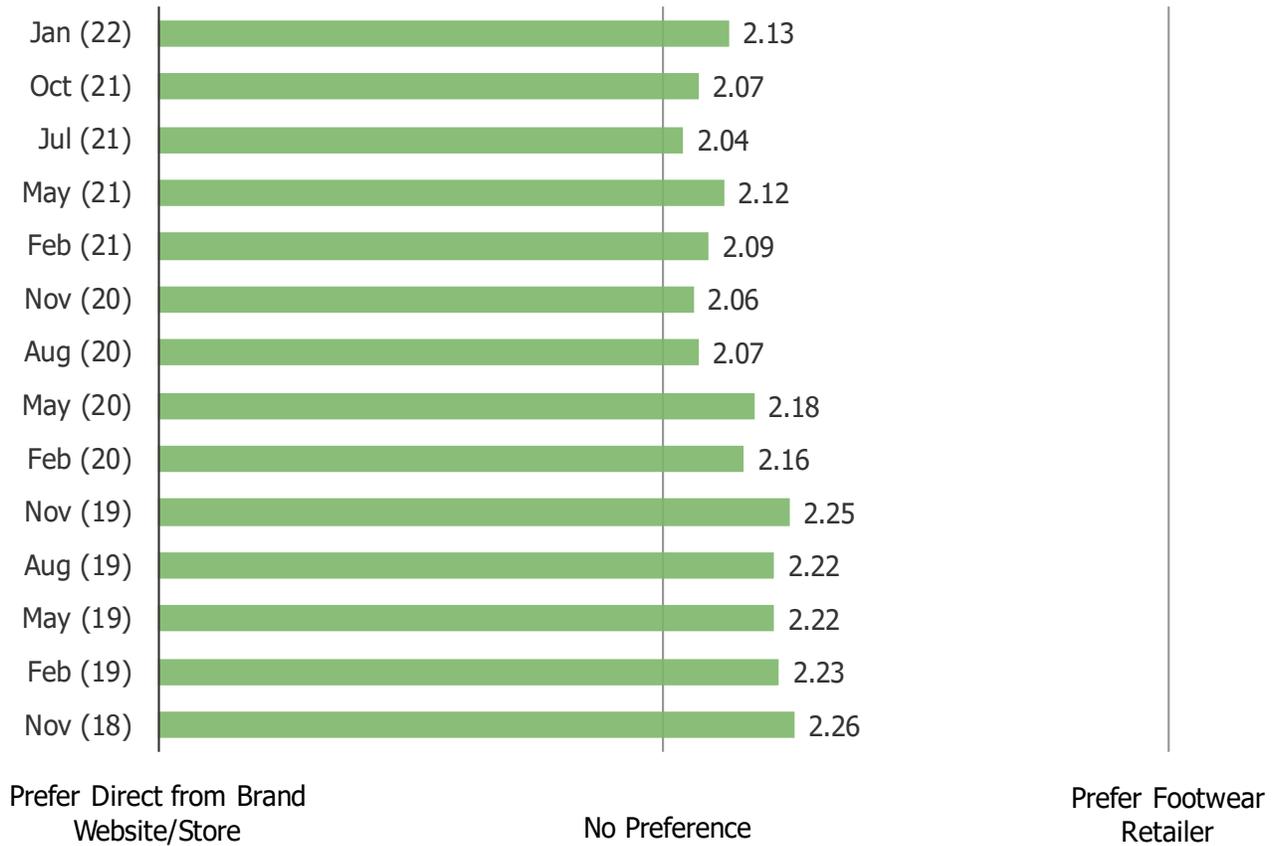
ATHLETIC CLOTHING TRENDS

The percentage of consumers who wear athletic clothing casually continues to trend near historical highs (despite declines q/q). Sentiment toward Nike and Under Armour has improved in recent months

FOOTWEAR PURCHASE PREFERENCES

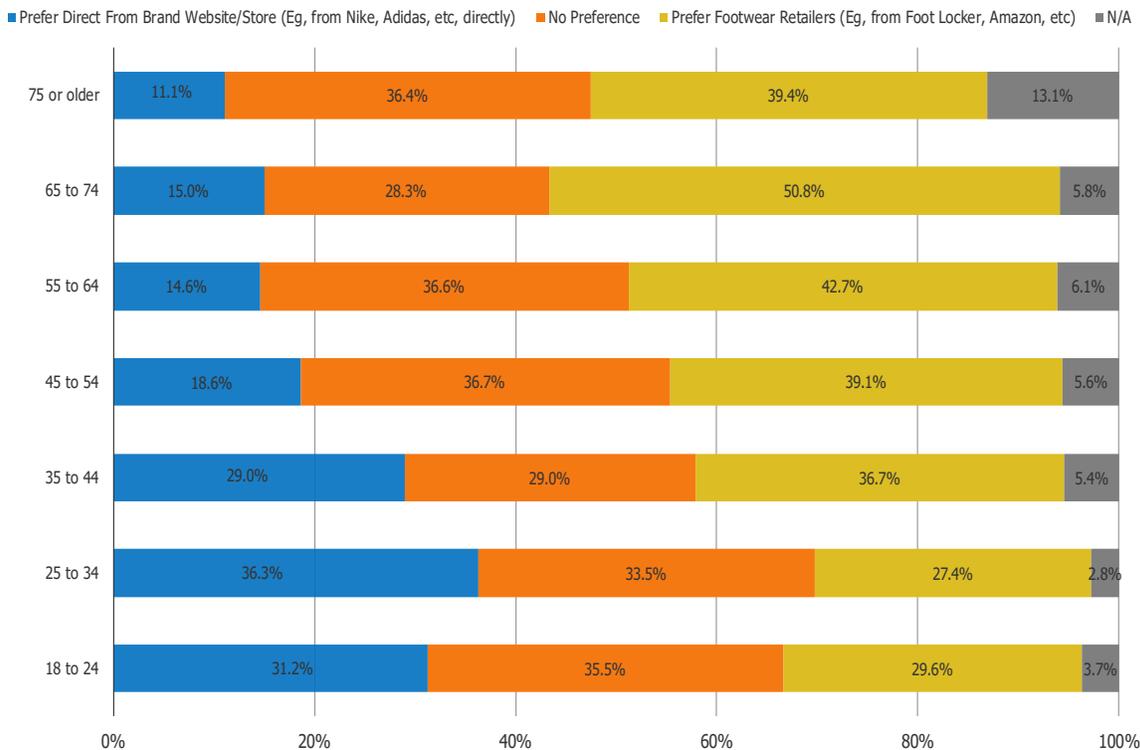
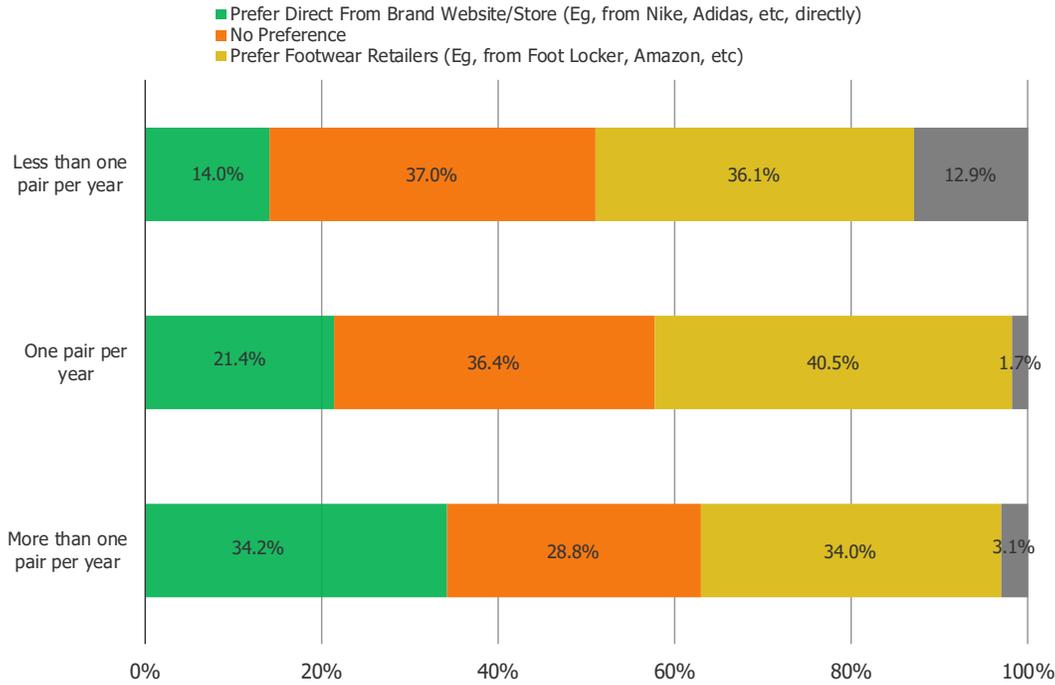
WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

Posed to all respondents



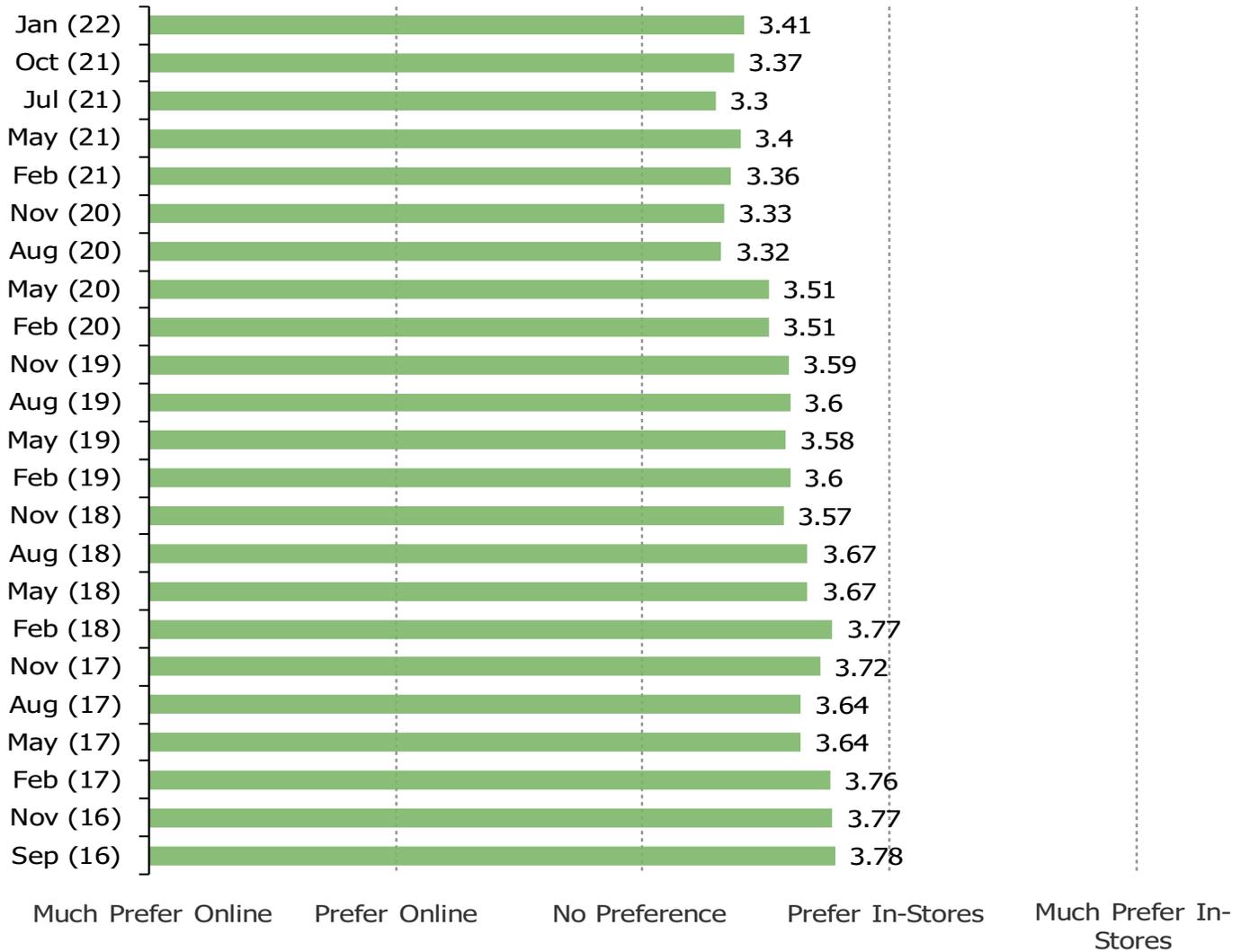
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Cross-Tab Analysis



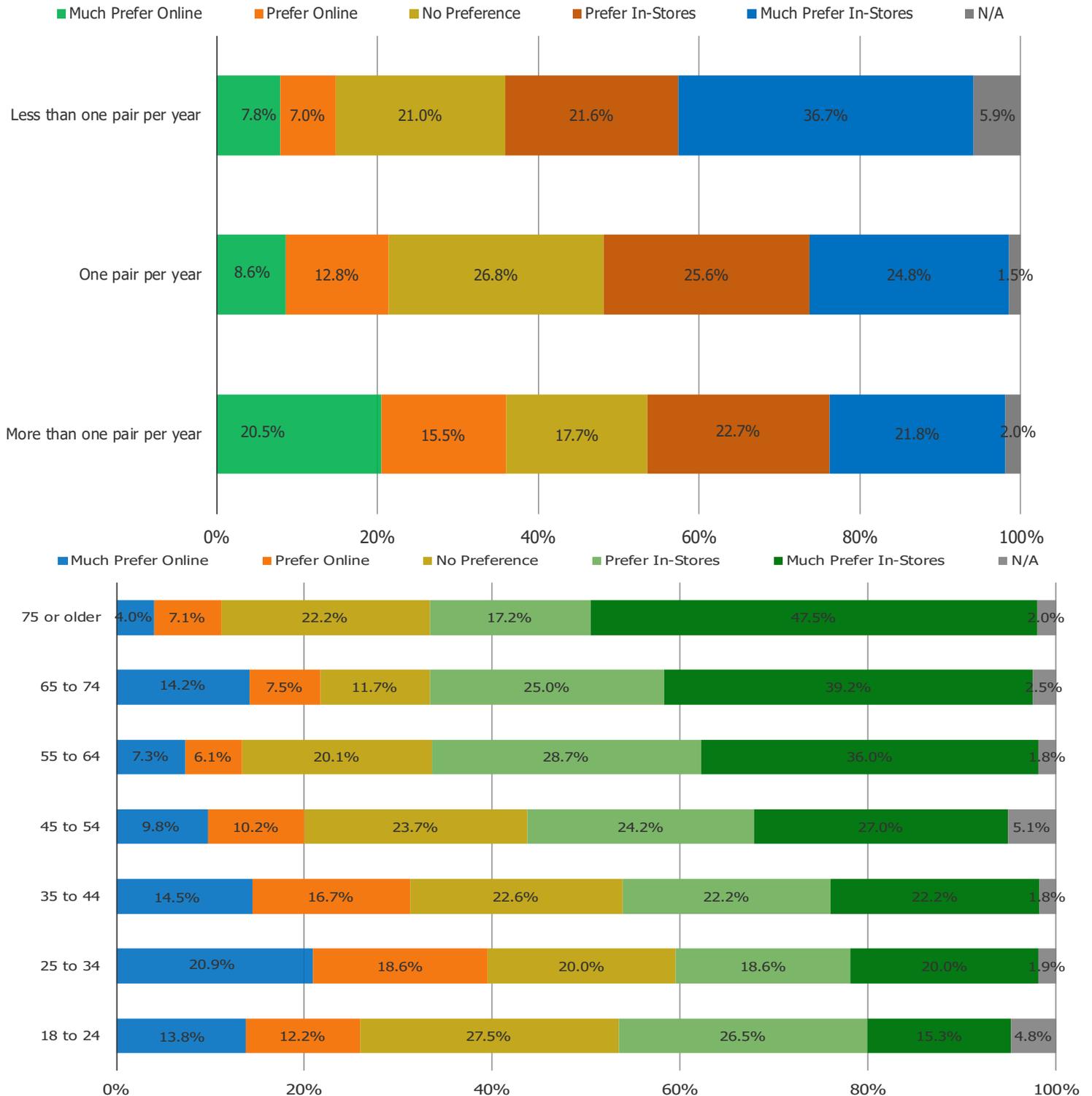
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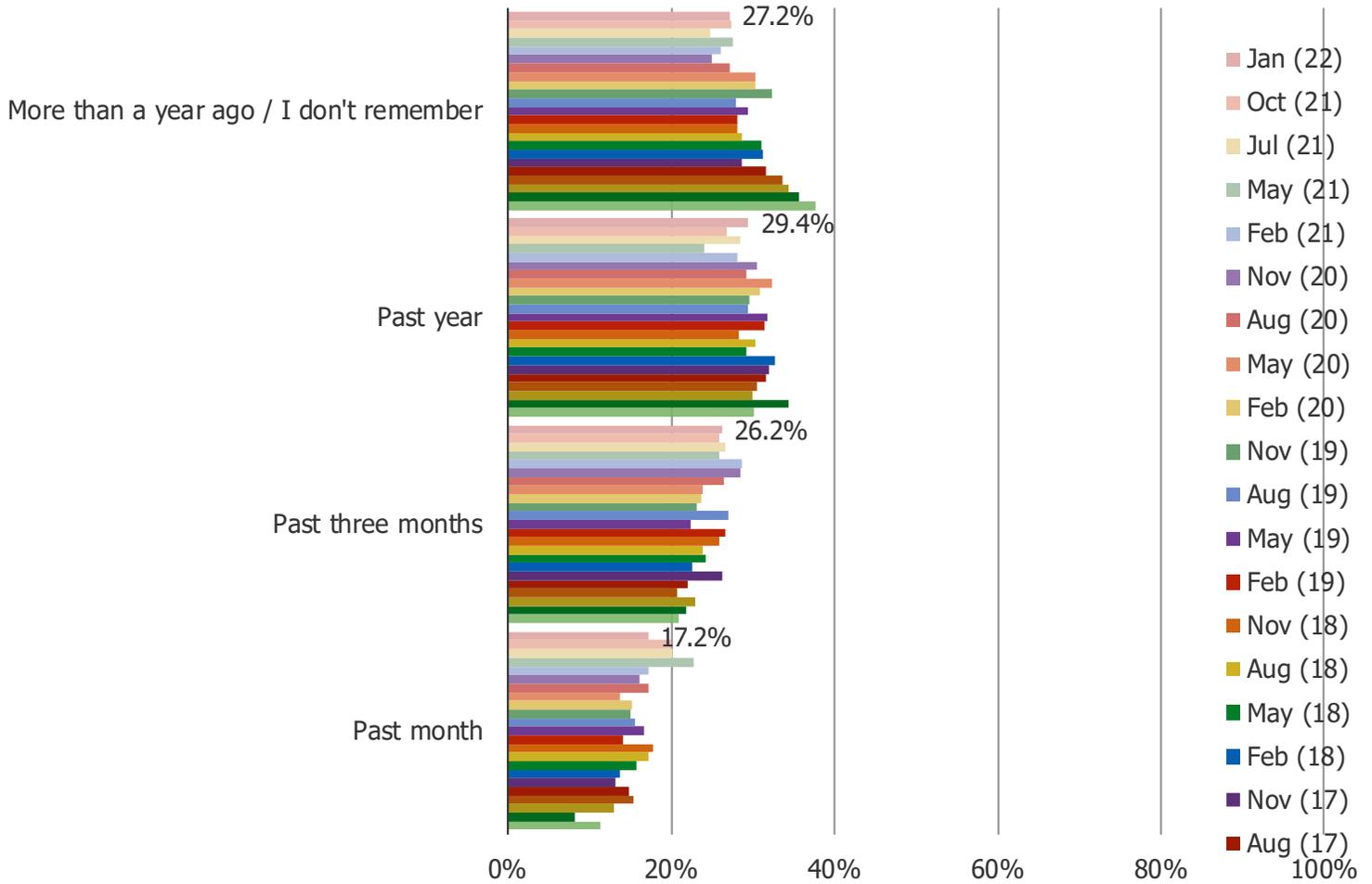
Cross-Tab Analysis



SNEAKER BUYING TRENDS

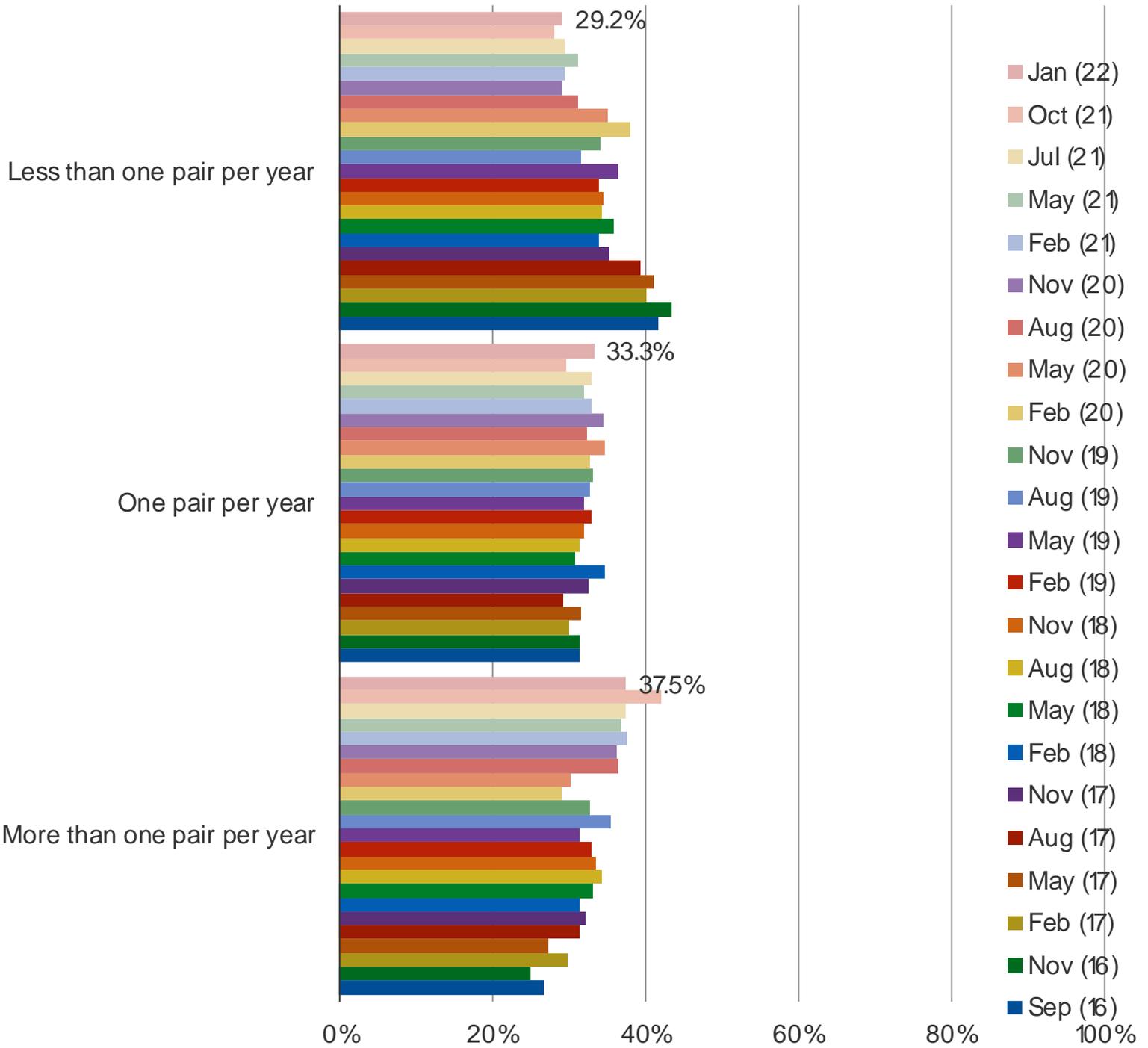
WHEN IS THE LAST TIME YOU BOUGHT A NEW PAIR OF SNEAKERS?

Posed to all respondents



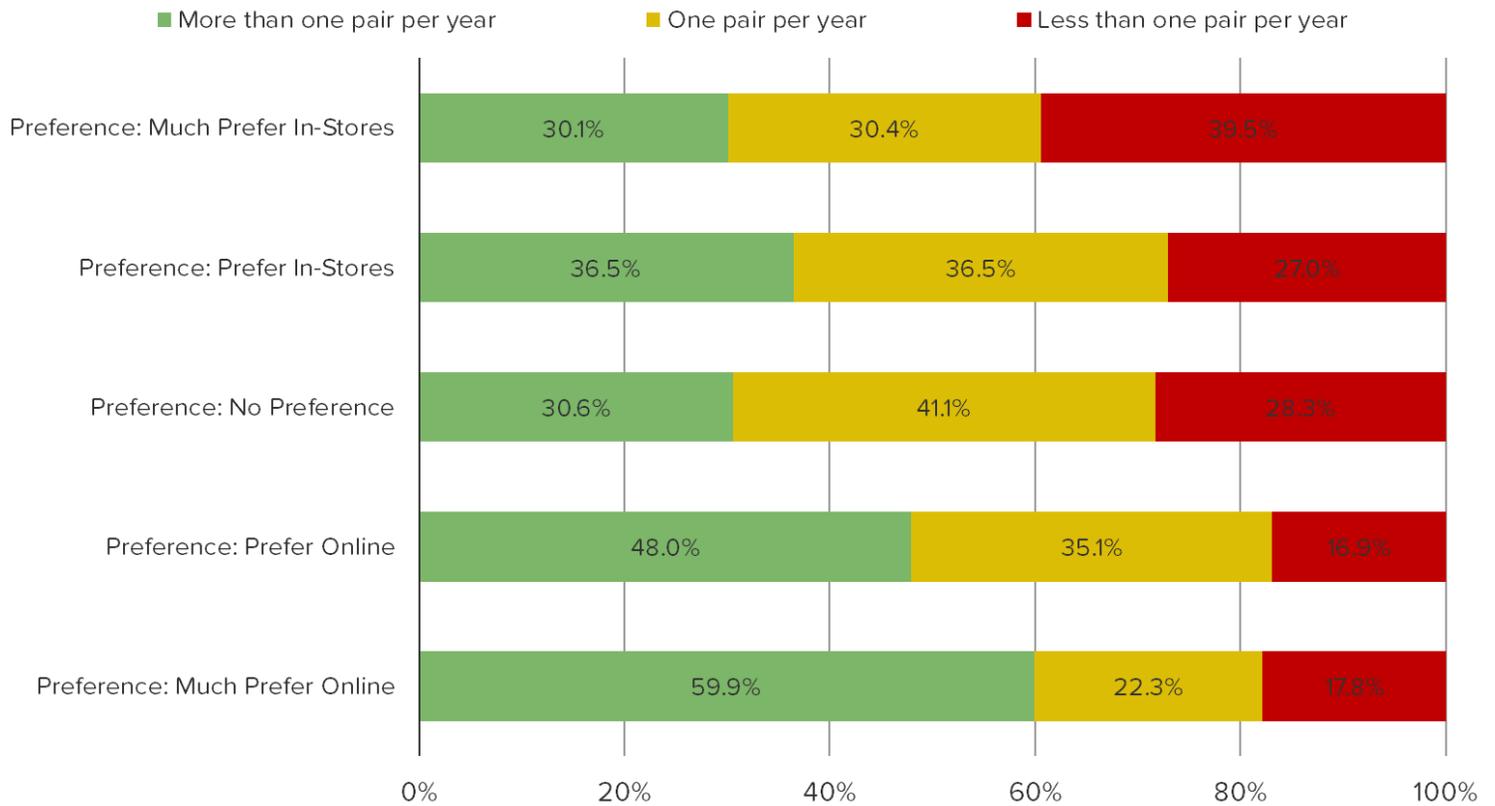
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

Posed to all respondents



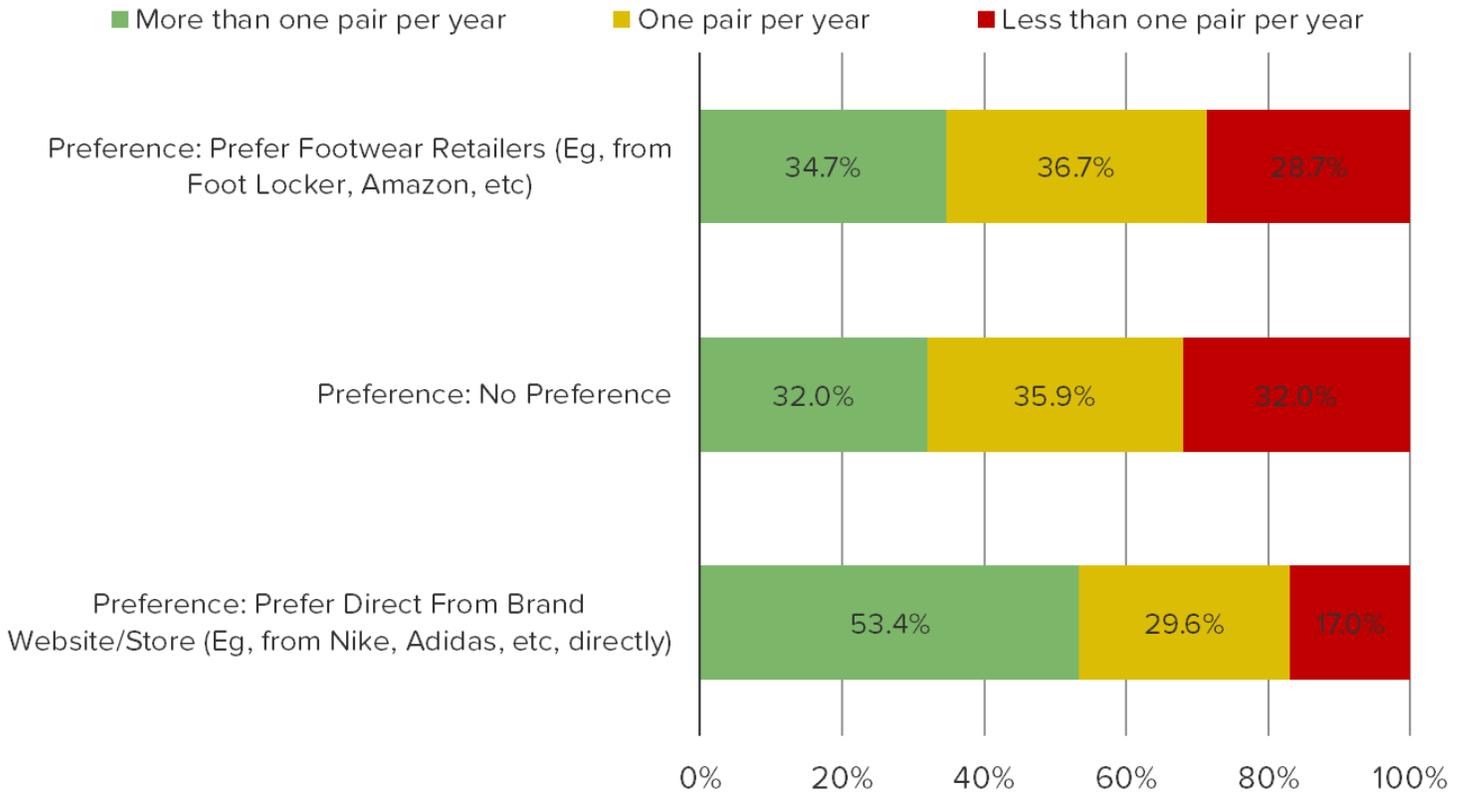
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

Posed to all respondents – Cross-tabbed by if they prefer to buy online vs. in-stores.



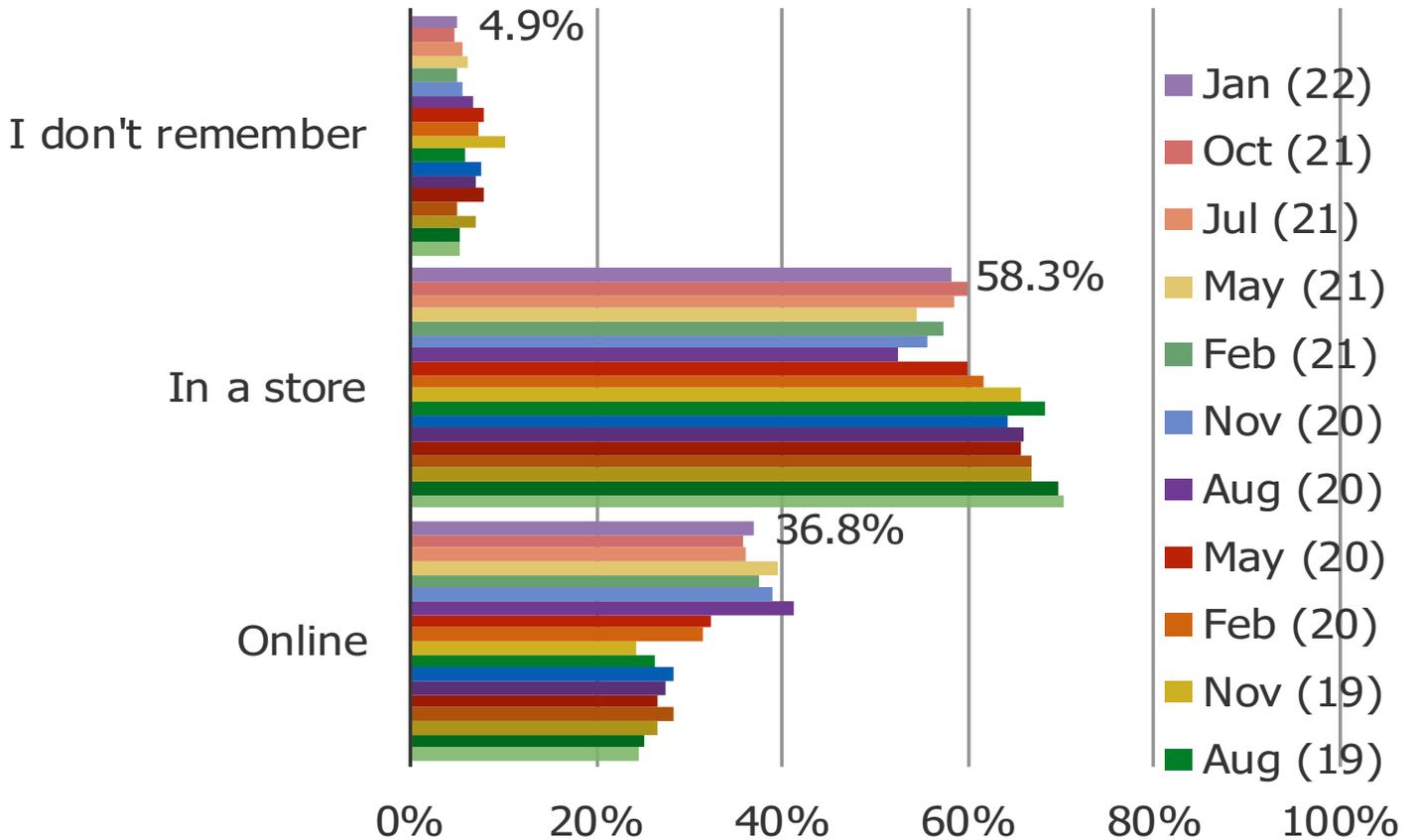
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

Posed to all respondents – Cross-tabbed by if they prefer to buy direct or from retailers.



THINKING OF THE LAST TIME YOU BOUGHT A PAIR OF SNEAKERS, DID YOU BUY THEM ONLINE OR IN A STORE?

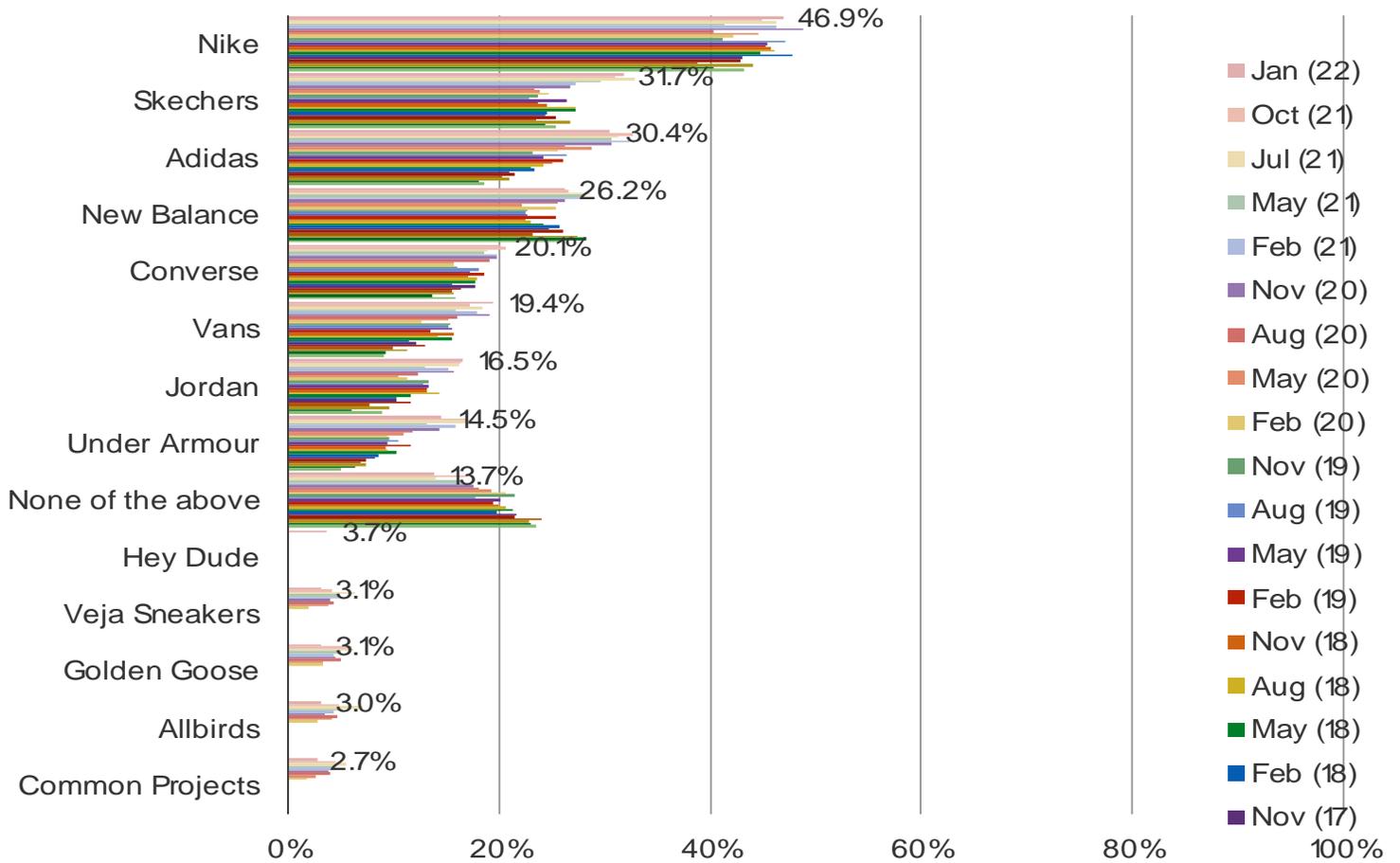
Posed to all respondents



SNEAKER BRANDS

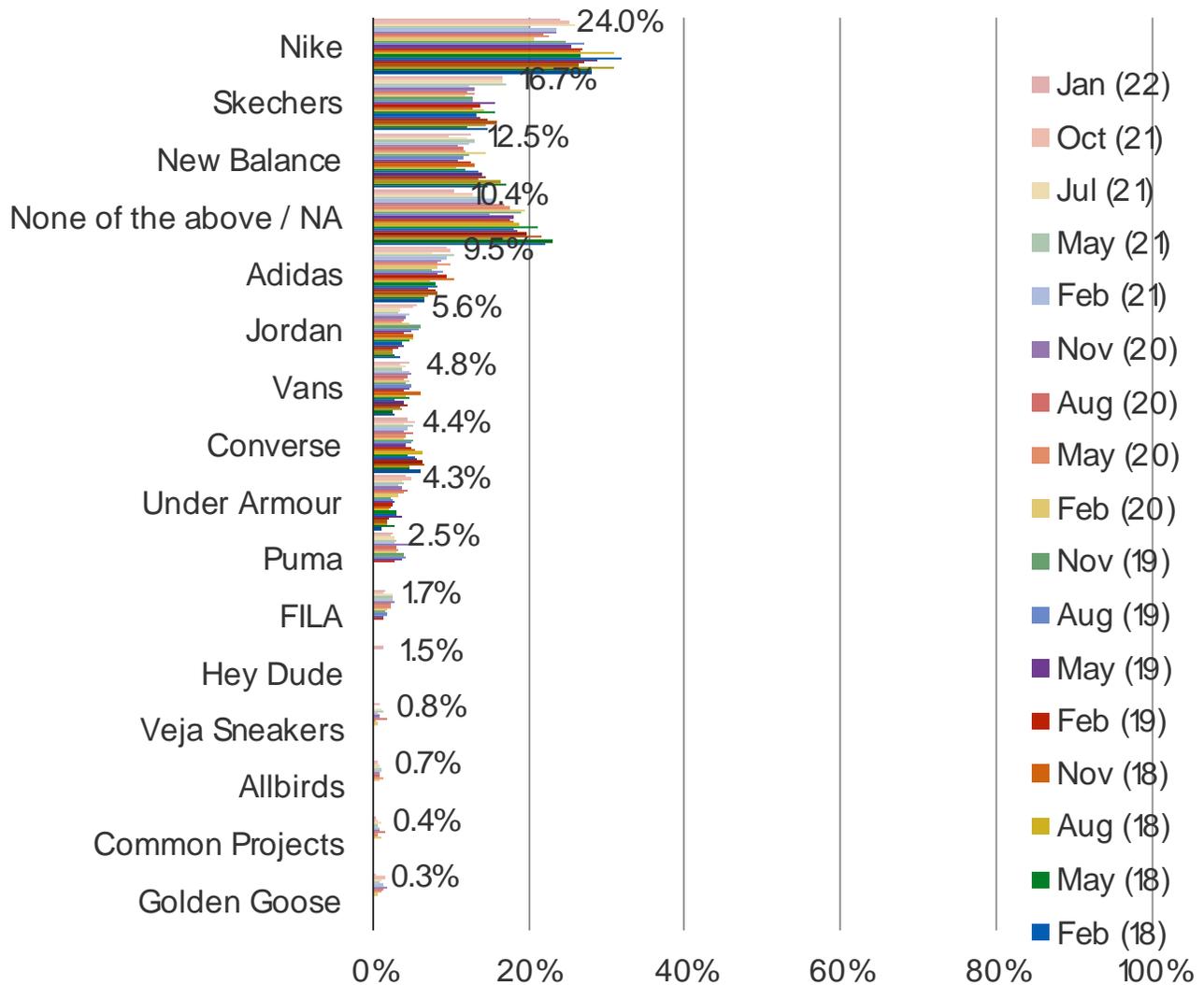
WHICH OF THE FOLLOWING BRANDS DO YOU OWN SNEAKERS FROM?

Posed to all respondents



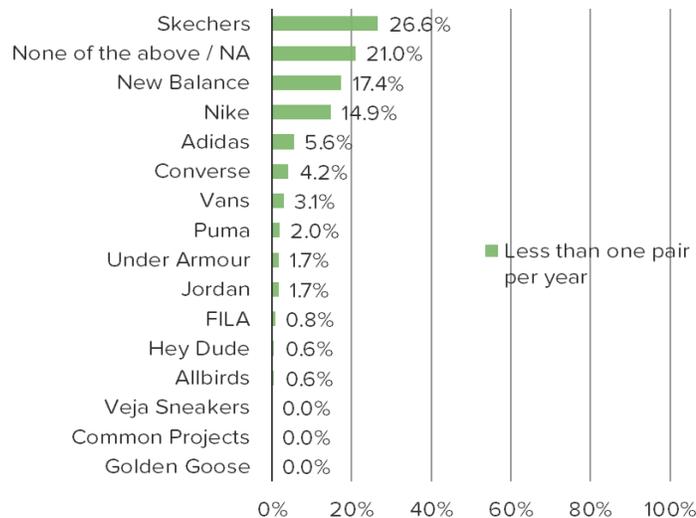
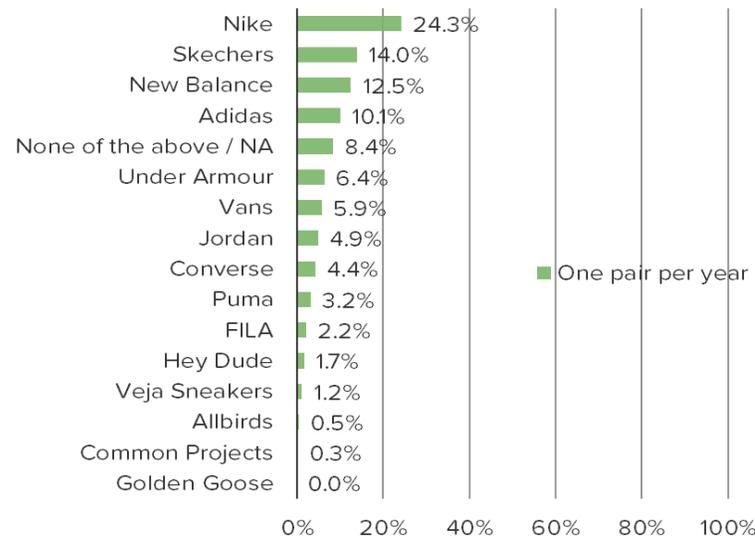
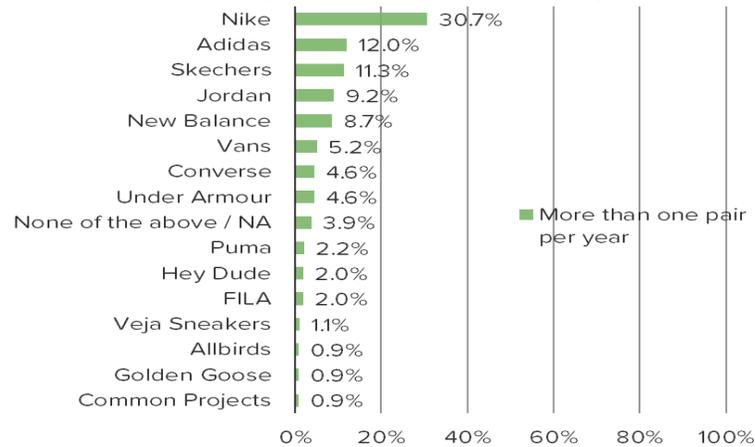
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

Posed to all respondents



IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

Posed to all respondents – Cross-tabbed by how often they buy sneakers.



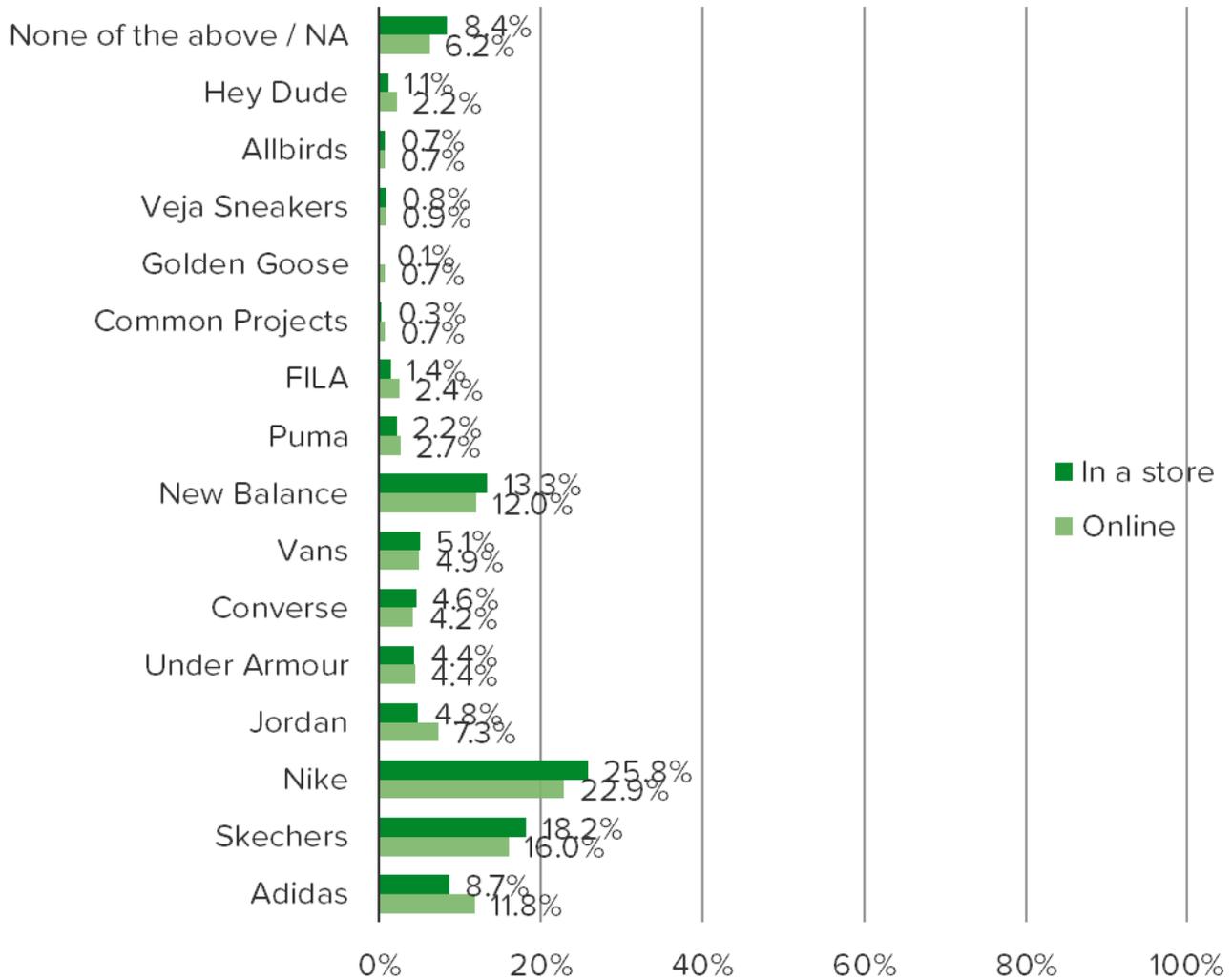
Looking into Their Soles

Audience: 1,250 US Consumers

Date: January 2022

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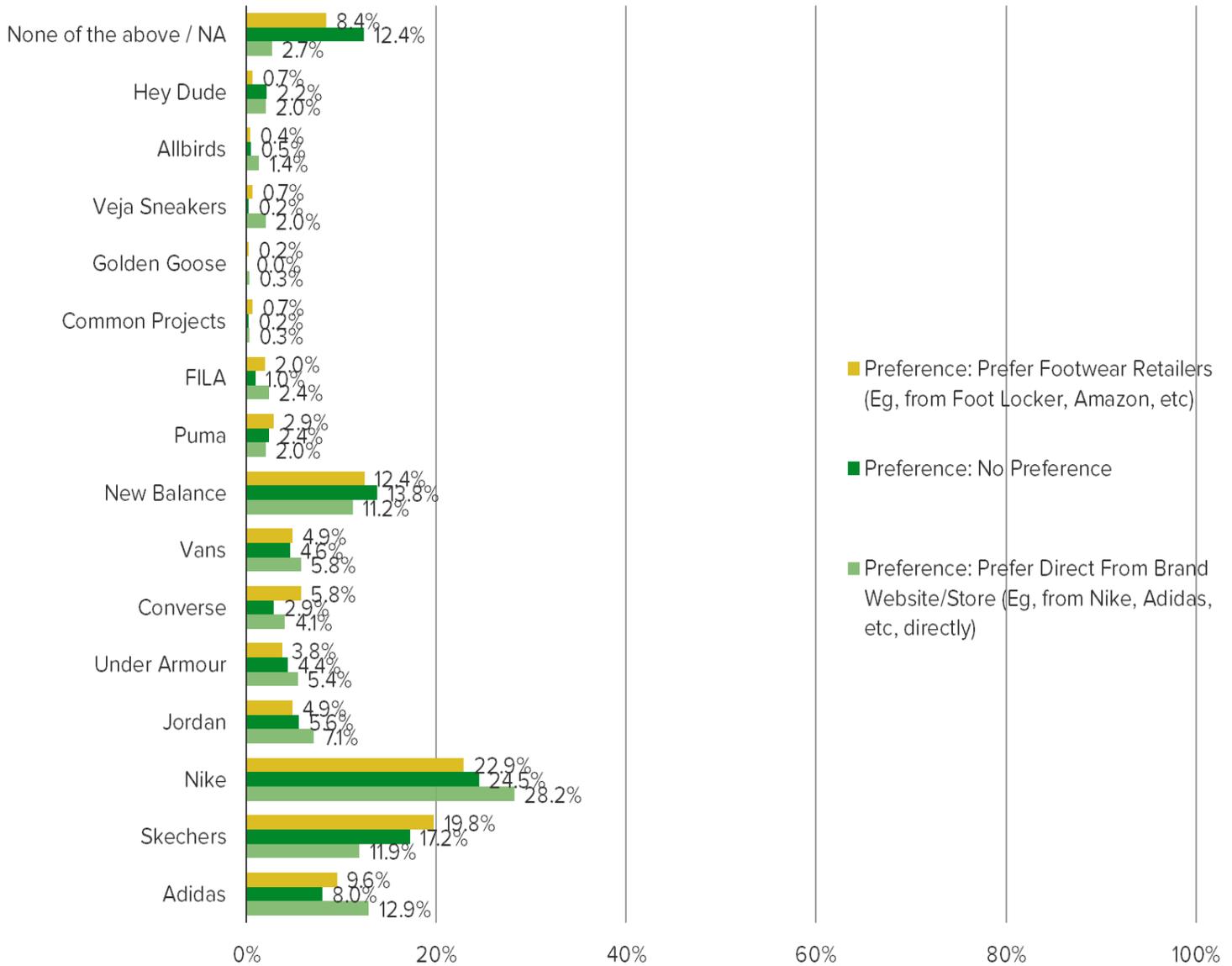
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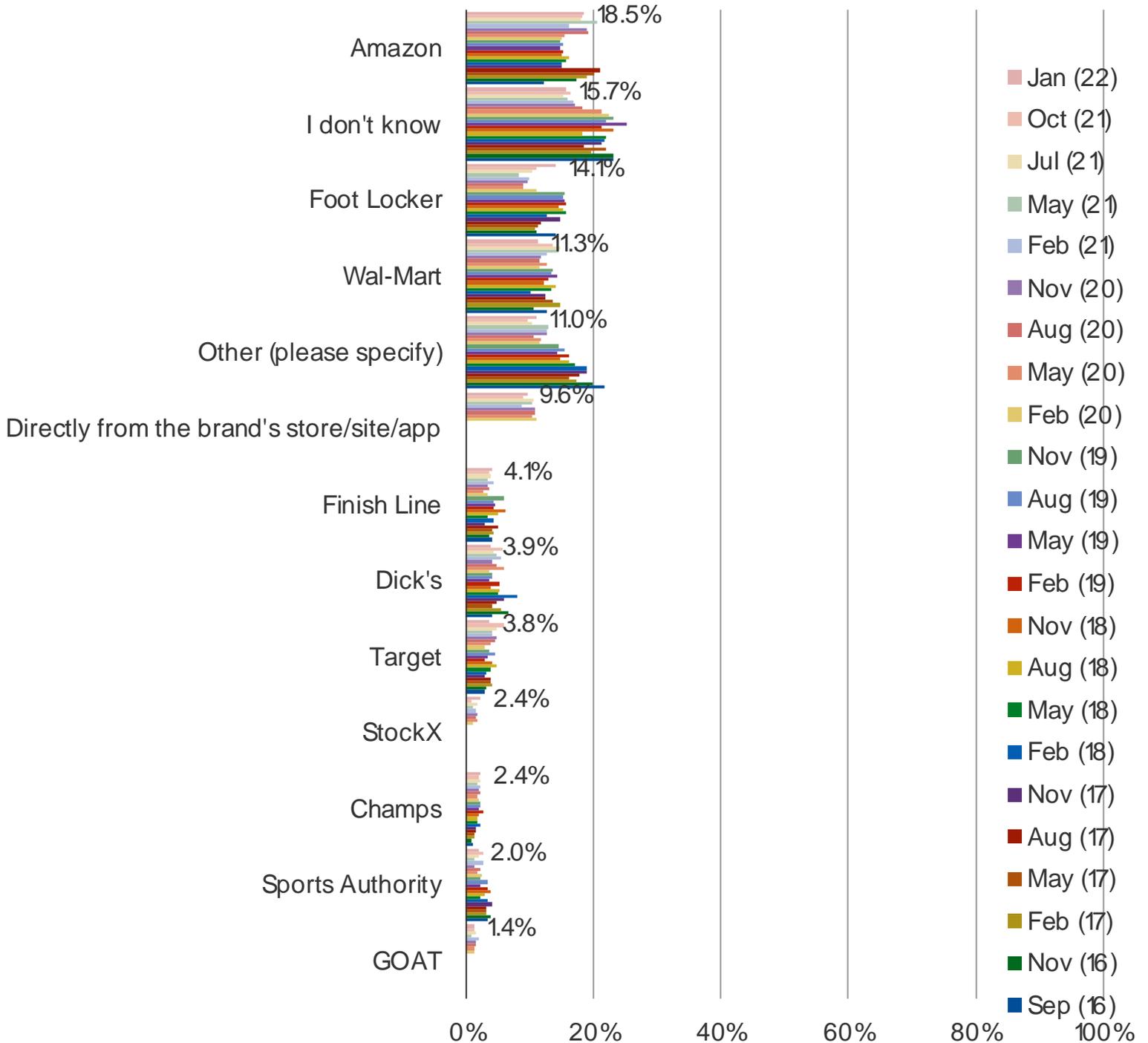
Posed to all respondents – Cross-tabbed by those who prefer to buy direct vs. from retailers.



FOOTWEAR RETAILERS

IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

Posed to all respondents



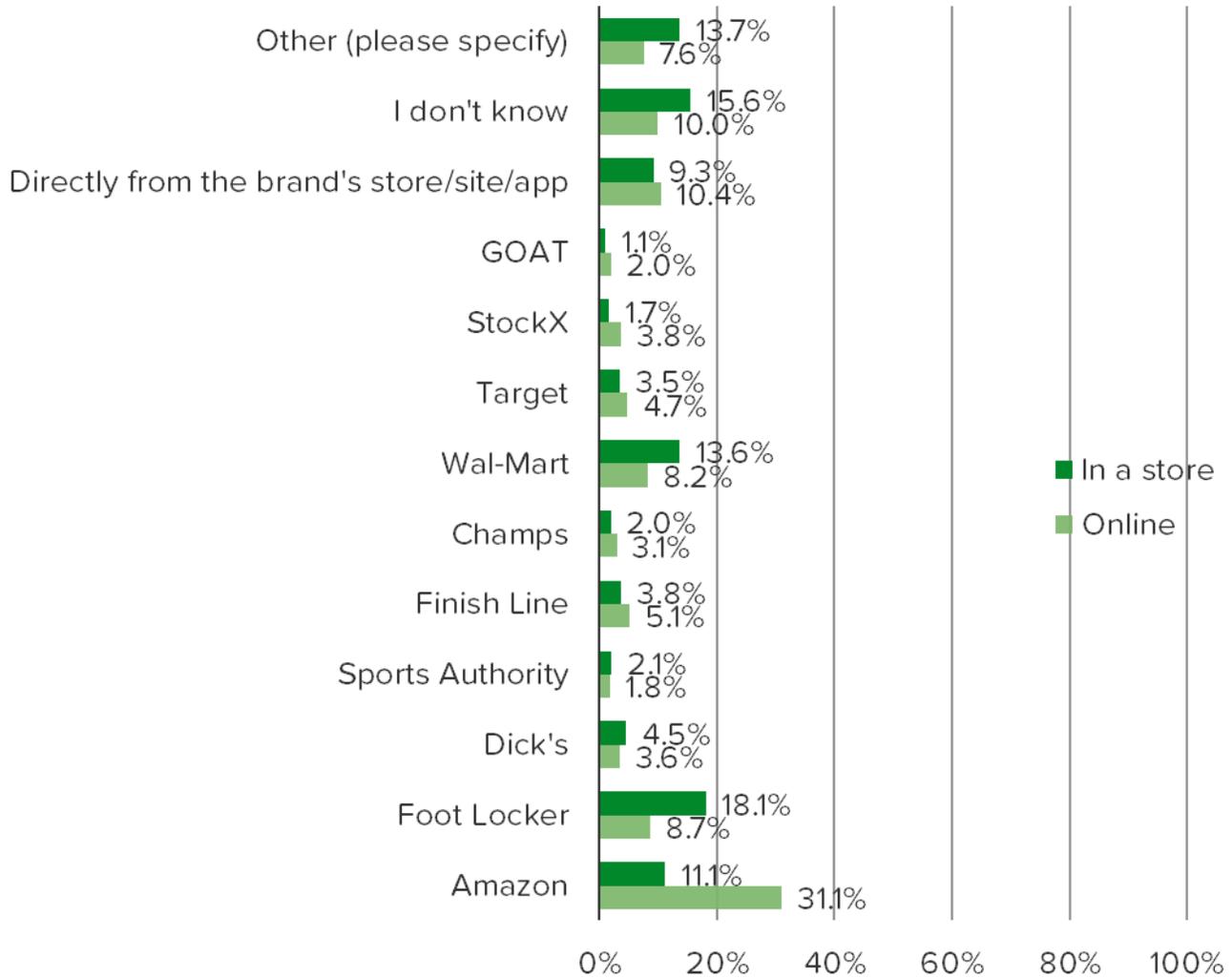
Looking into Their Soles

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Date: January 2022

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Posed to all respondents – Cross-tabbed by if they prefer buying online or in-stores.



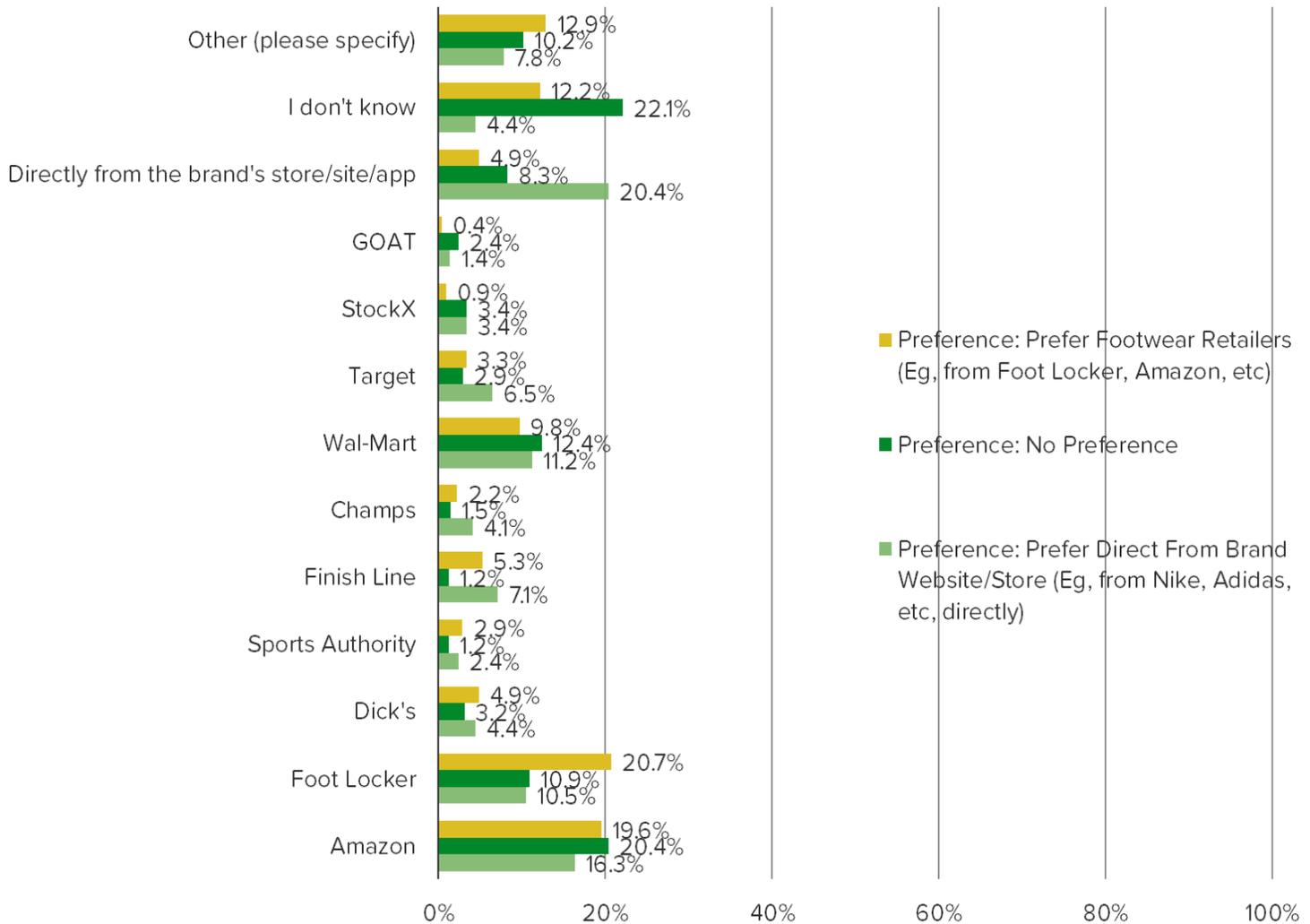
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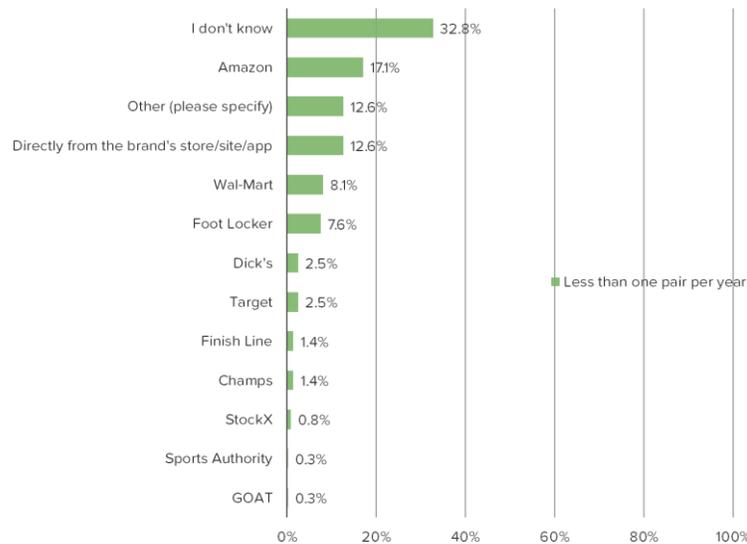
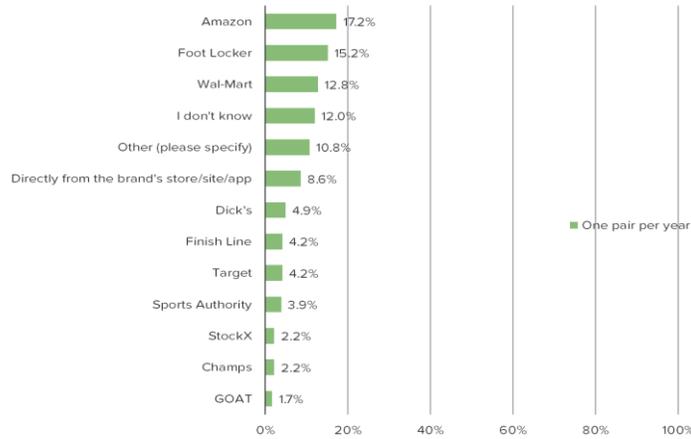
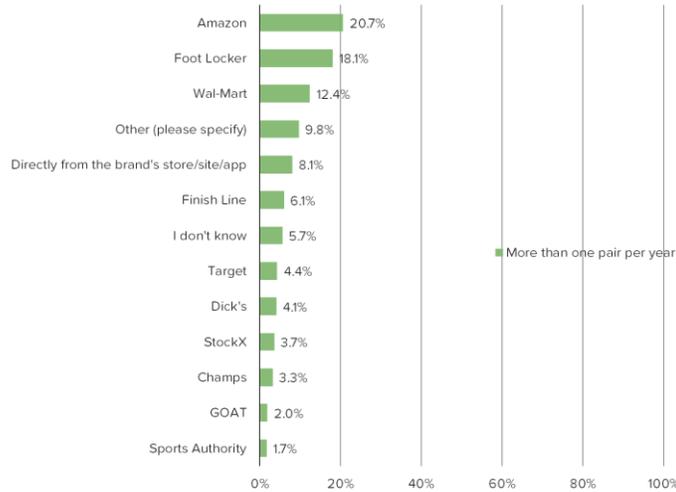
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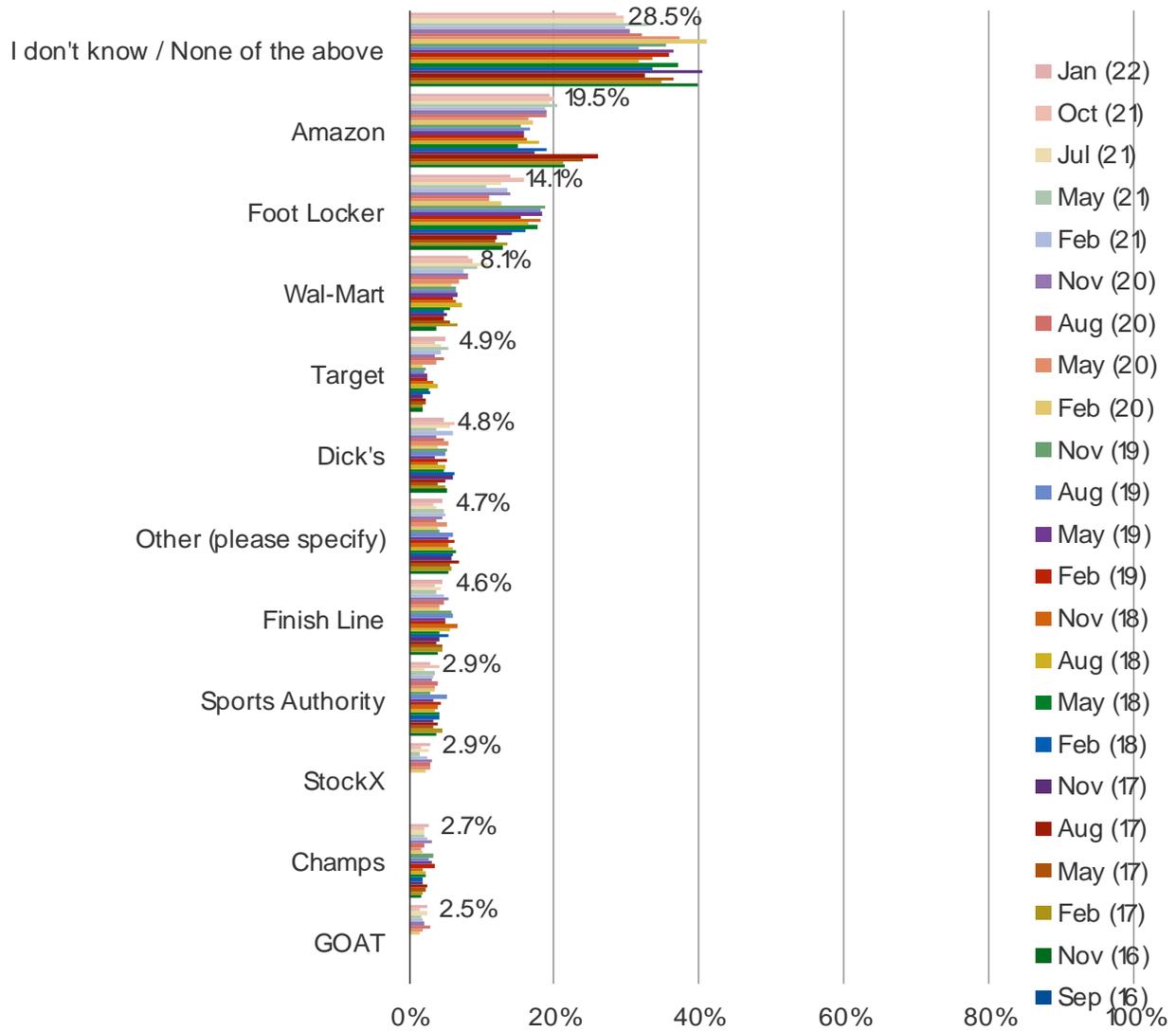
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

Posed to all respondents – Cross-tabbed by how often they buy sneakers.



WHICH RETAILER HAS THE MOST SNEAKERS THAT YOU CAN'T FIND ELSEWHERE?

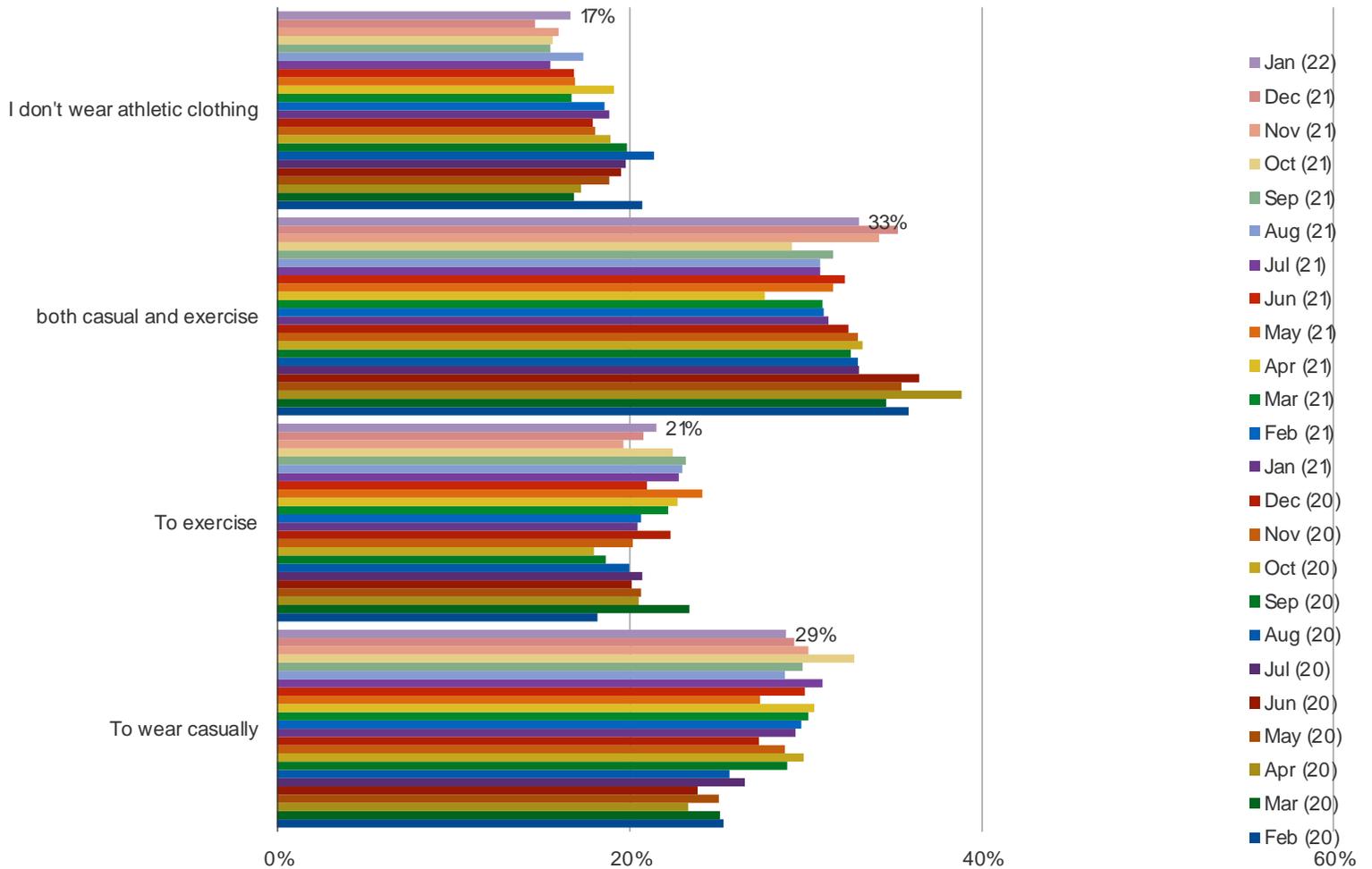
Posed to all respondents



CASUAL WEAR

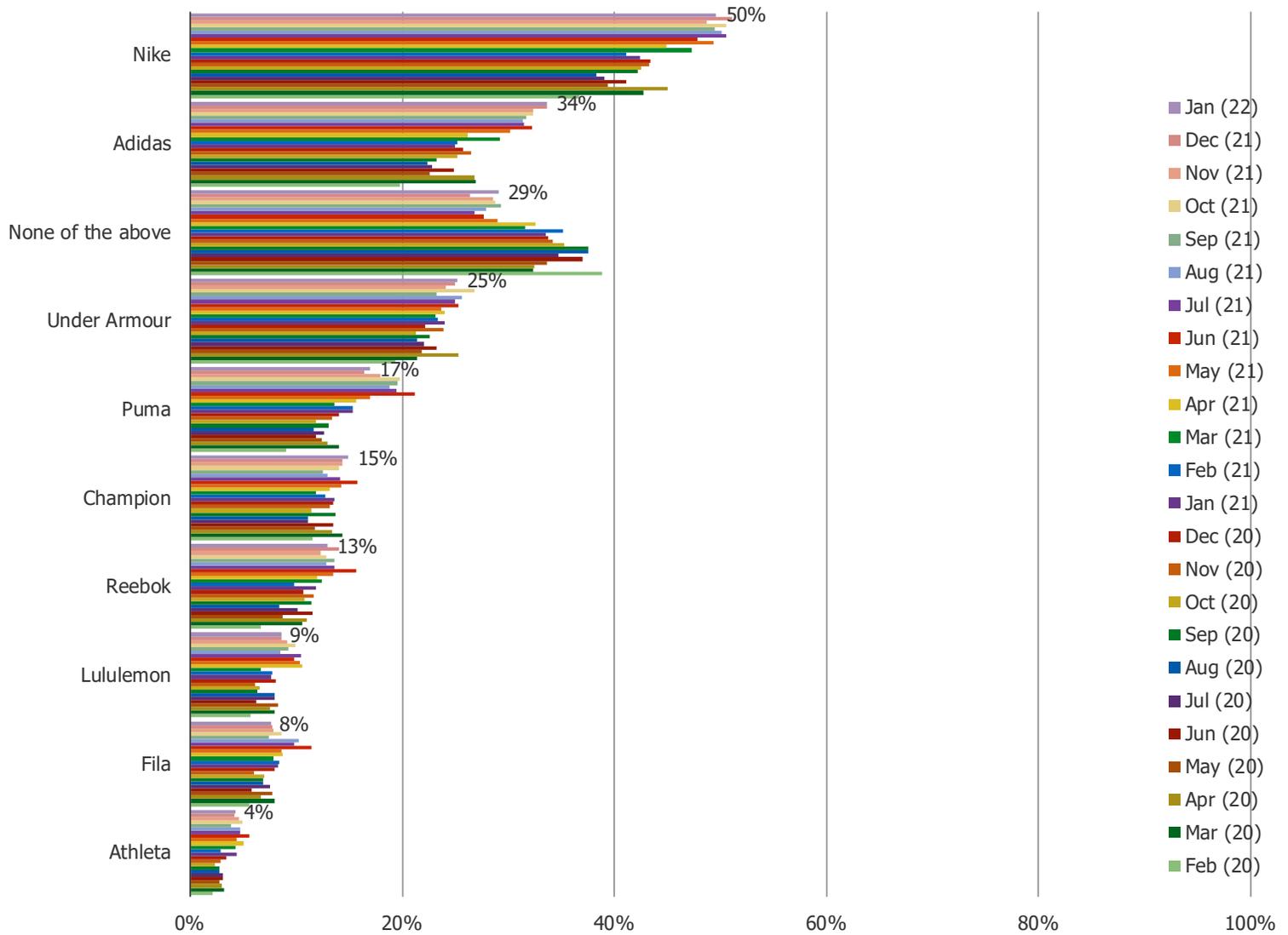
WHAT DO YOU USE ATHLETIC CLOTHING FOR?

Posed to all respondents



DO YOU REGULARLY OR OCCASIONALLY WEAR ATHLETIC CLOTHING FROM THE FOLLOWING BRANDS?

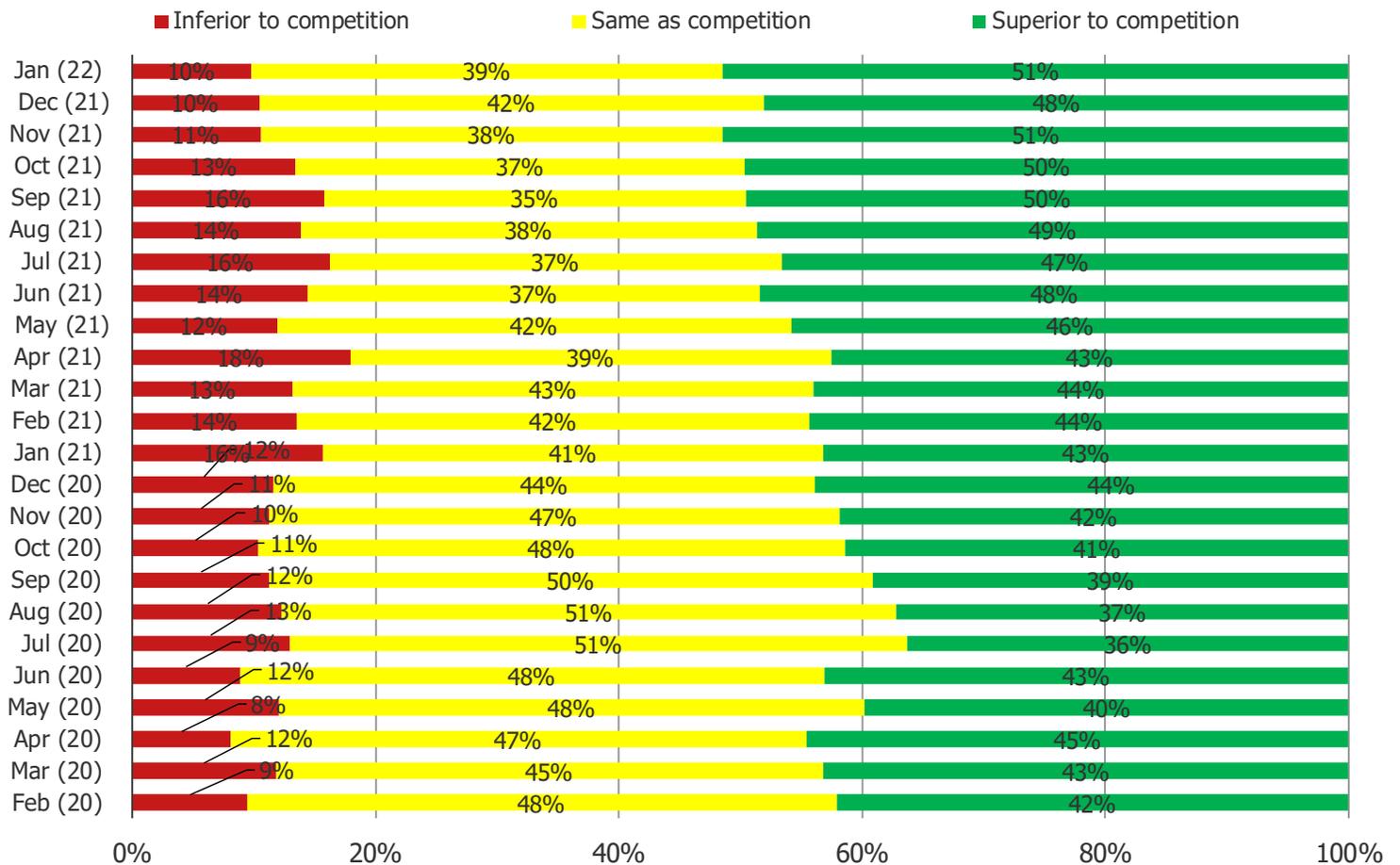
Posed to all respondents



IN YOUR OPINION, HOW DOES THIS BRAND'S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

Posed to respondents who regularly or occasionally wear athletic clothing from the following

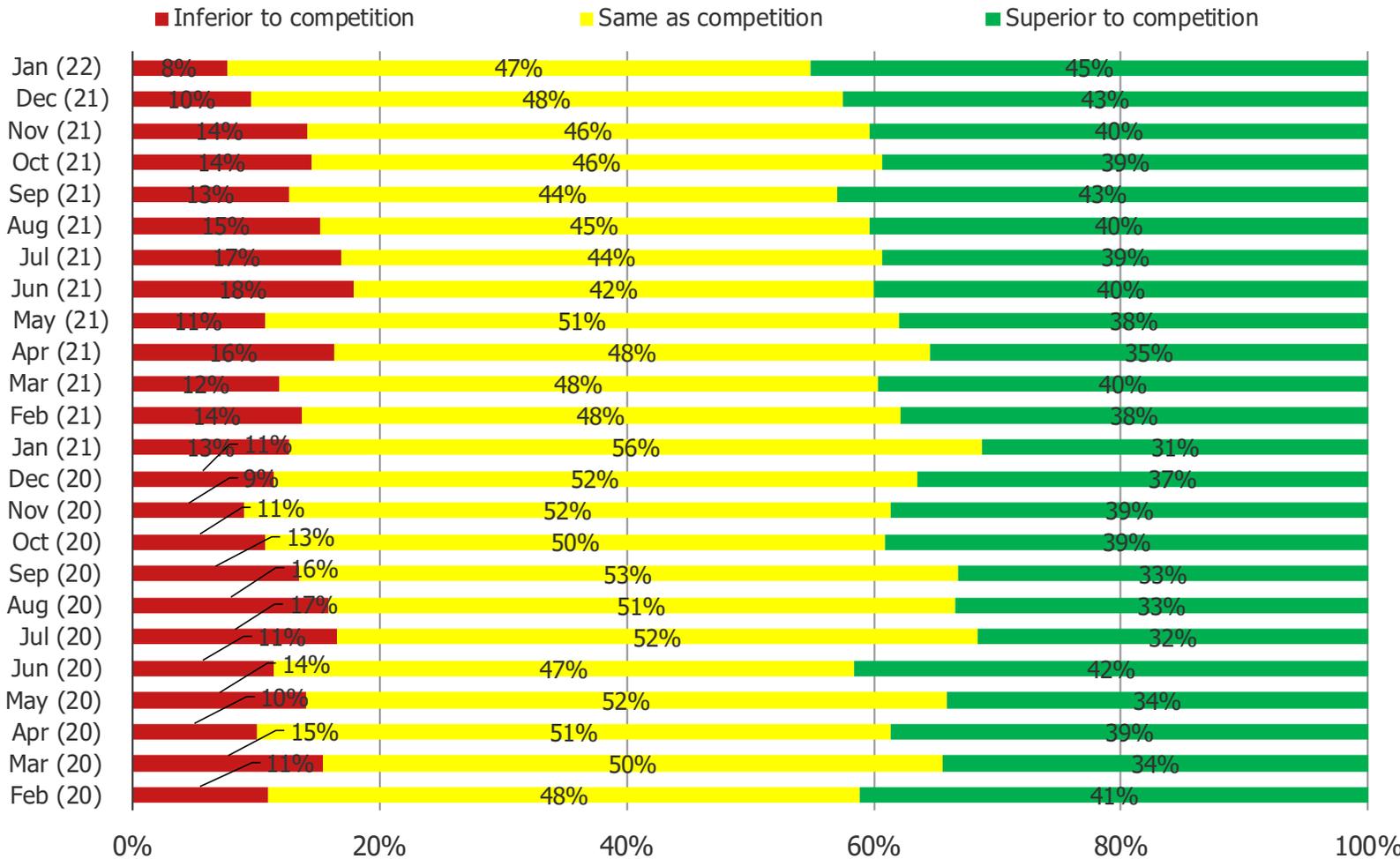
NIKE



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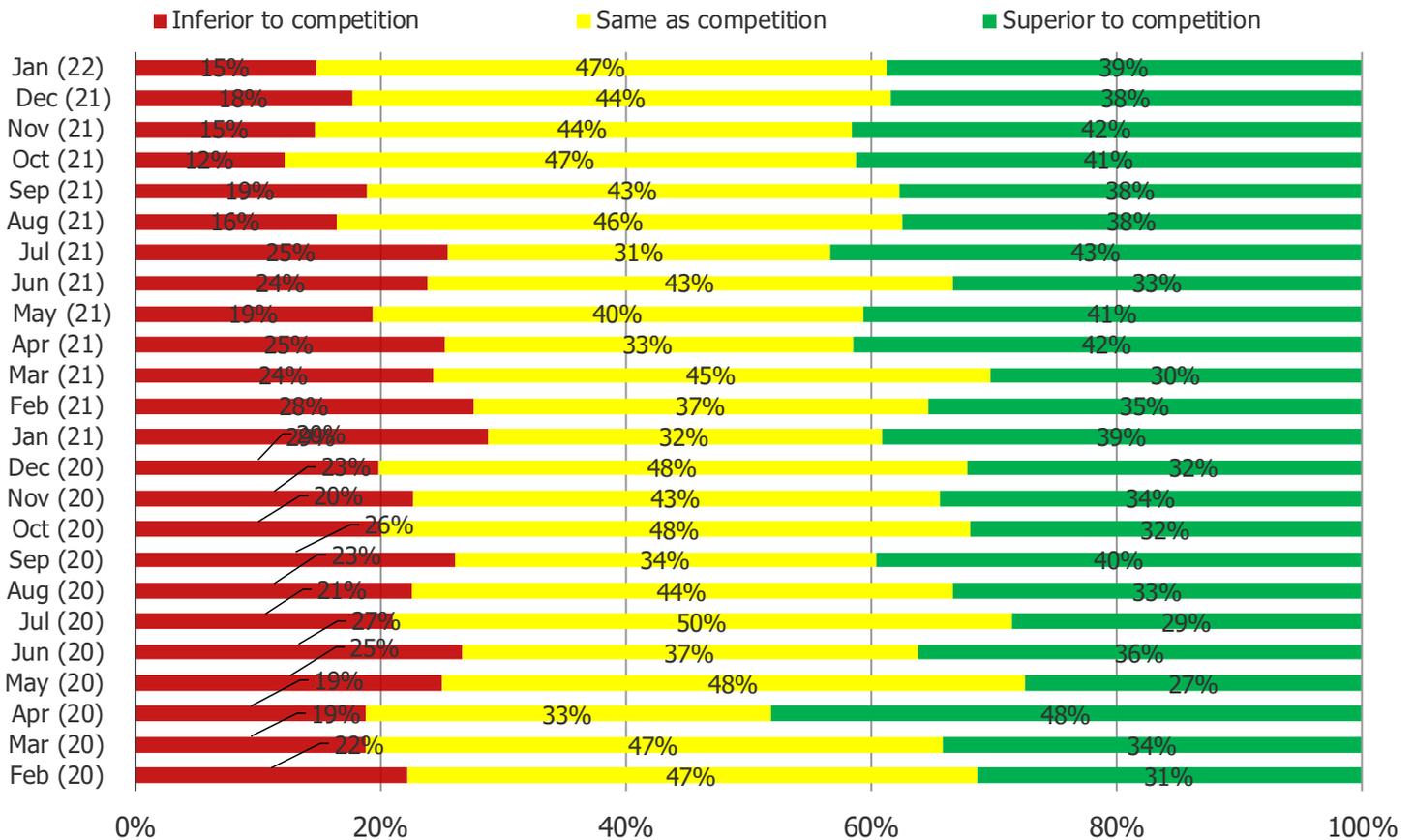
UNDER ARMOUR



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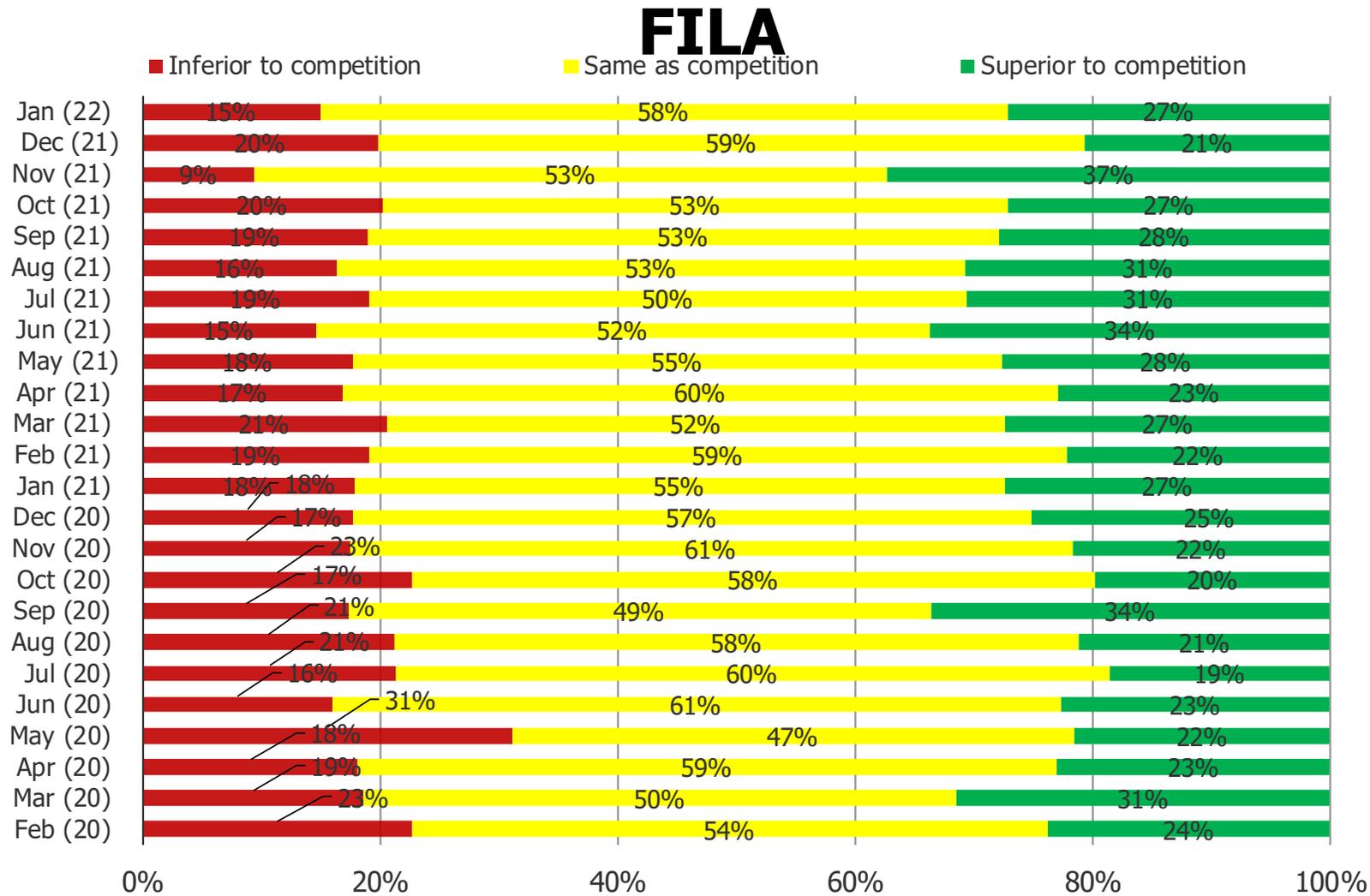
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LULULEMON



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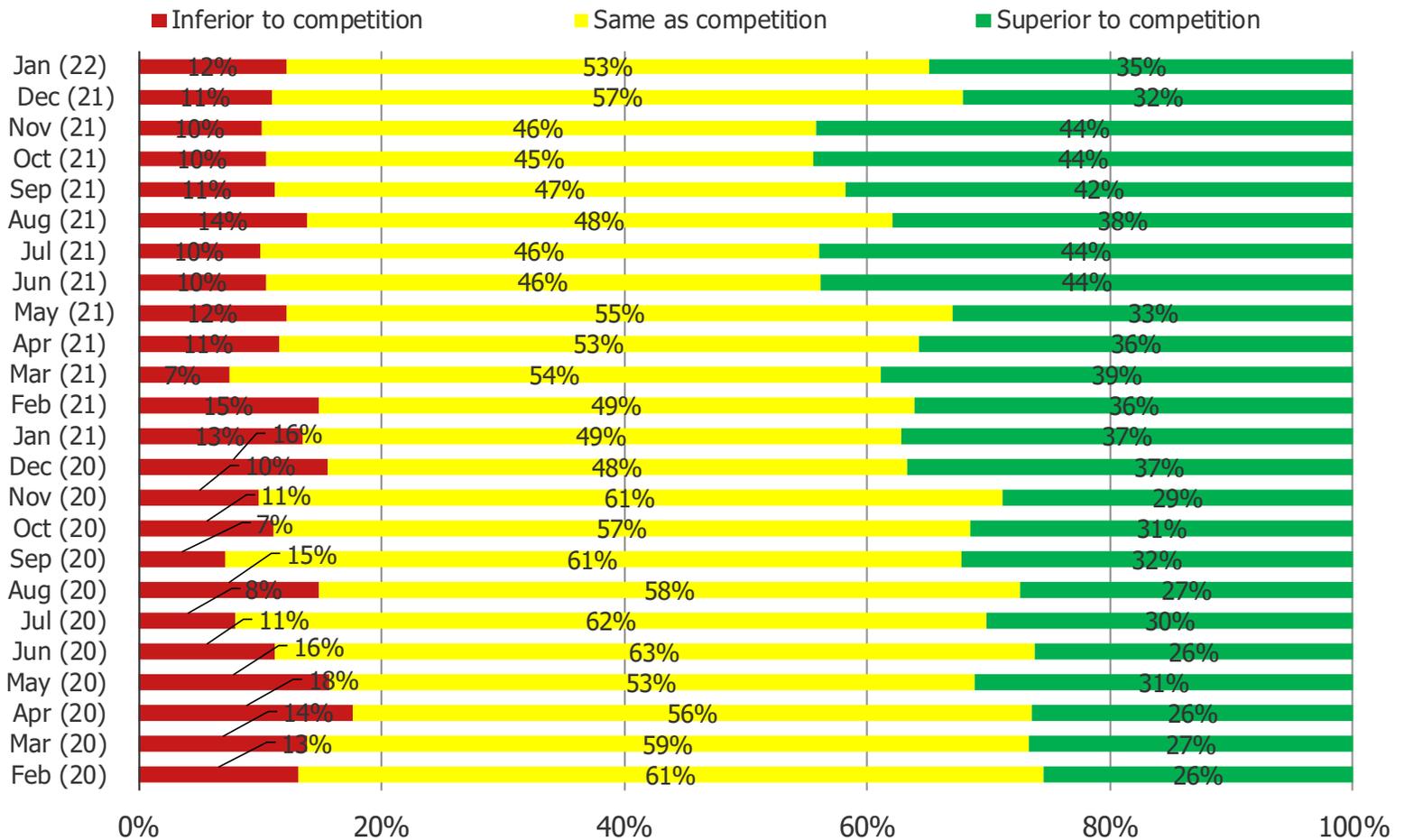
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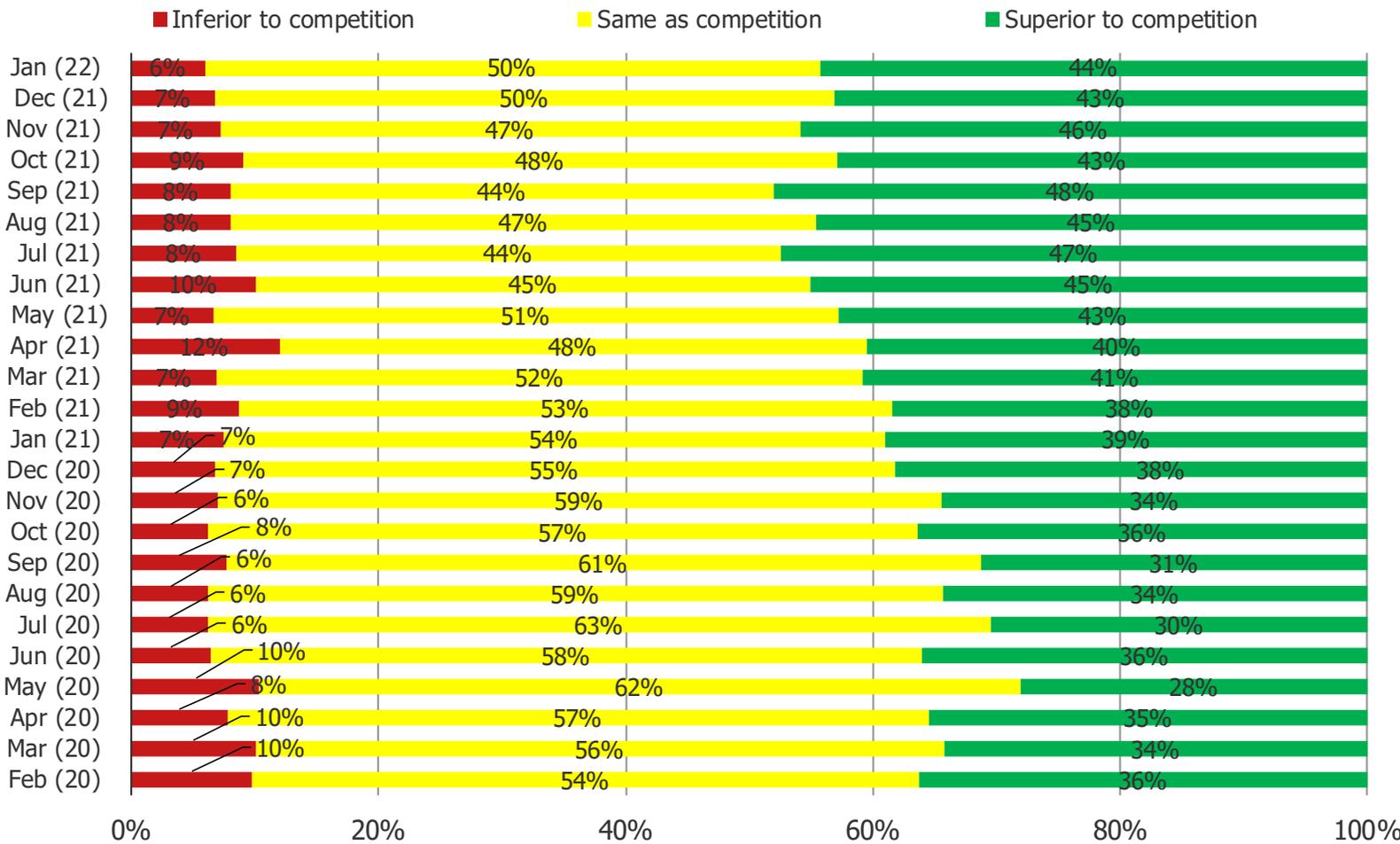
PUMA



IN YOUR OPINION, HOW DOES THIS BRAND'S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

Posed to respondents who regularly or occasionally wear athletic clothing from the following

ADIDAS



IN YOUR OPINION, HOW DOES THIS BRAND'S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

Posed to respondents who regularly or occasionally wear athletic clothing from the following

CHAMPION

■ Inferior to competition ■ Same as competition ■ Superior to competition



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Posed to respondents who regularly or occasionally wear athletic clothing from the following

ATHLETA

■ Inferior to competition ■ Same as competition ■ Superior to competition



IN YOUR OPINION, HOW DOES THIS BRAND'S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

Posed to respondents who regularly or occasionally wear athletic clothing from the following

REEBOK

