

**Nike (NKE)**

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# **Nike Is Well-Positioned With Consumers For The Long Haul**

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**March 18, 2020**

# I

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**Sneaker Purchasing is Shifting Direct, Driven by Millennials and Nike/Jordan**

**Footwear Purchasing is Shifting Online**

**Nike Customers Are Among The Most Loyal**

**Nike and Under Armour Flagged As “Up and Coming Brands” Generating Excitement**

**Athleisure’s Upswing / Usage For Casual Wear is Being Driven By Millennials**

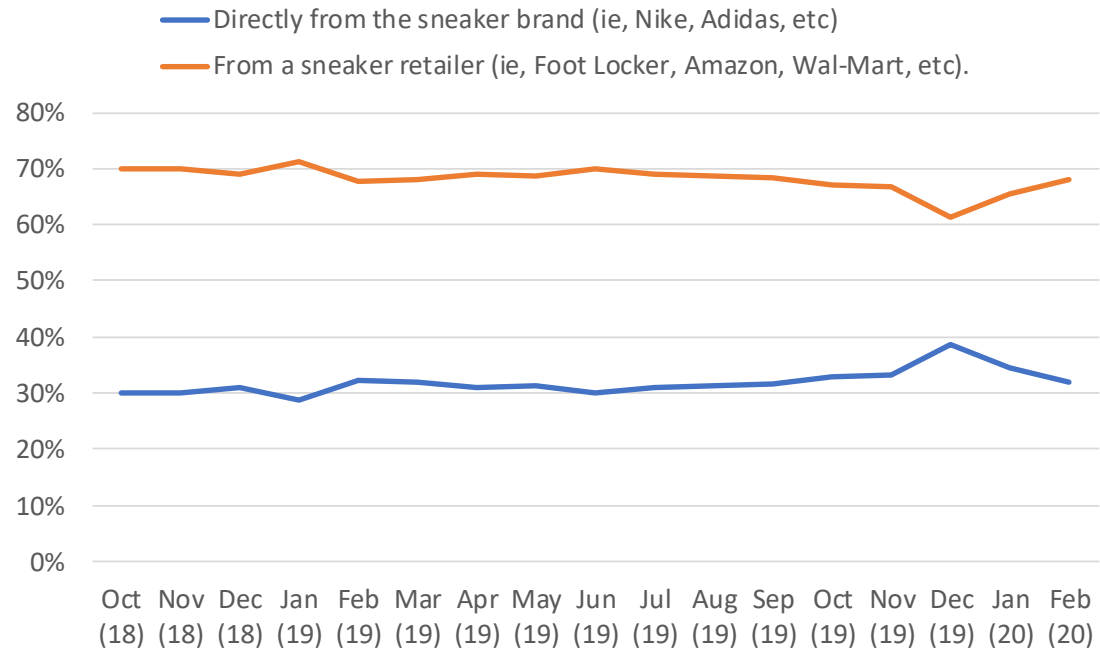
**Nike and Under Armour Viewed As Having Better Athletic Performance Than Competitors**

**Sentiment Toward Nike in China is Very Positive**

## Consumers have gradually shifted in toward buying footwear direct. Going direct peaked/hit a high during the holiday months.

Thinking about the most recent pair of sneakers you bought, did you get them directly from the sneaker brand's website/app or from a retailer of multiple sneaker brands?

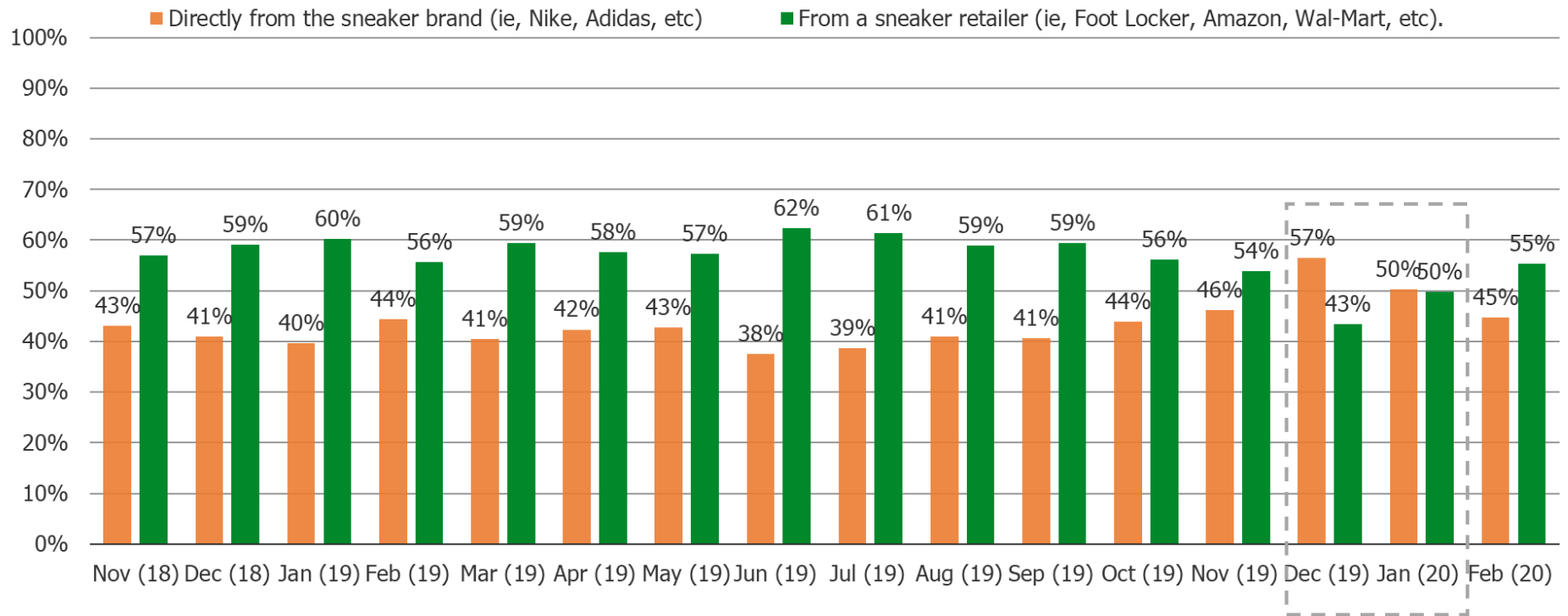
### POSED TO ALL RESPONDENTS



## Millennials are more likely than 35+ year-olds to buy direct. They were actually more likely in December to go direct.

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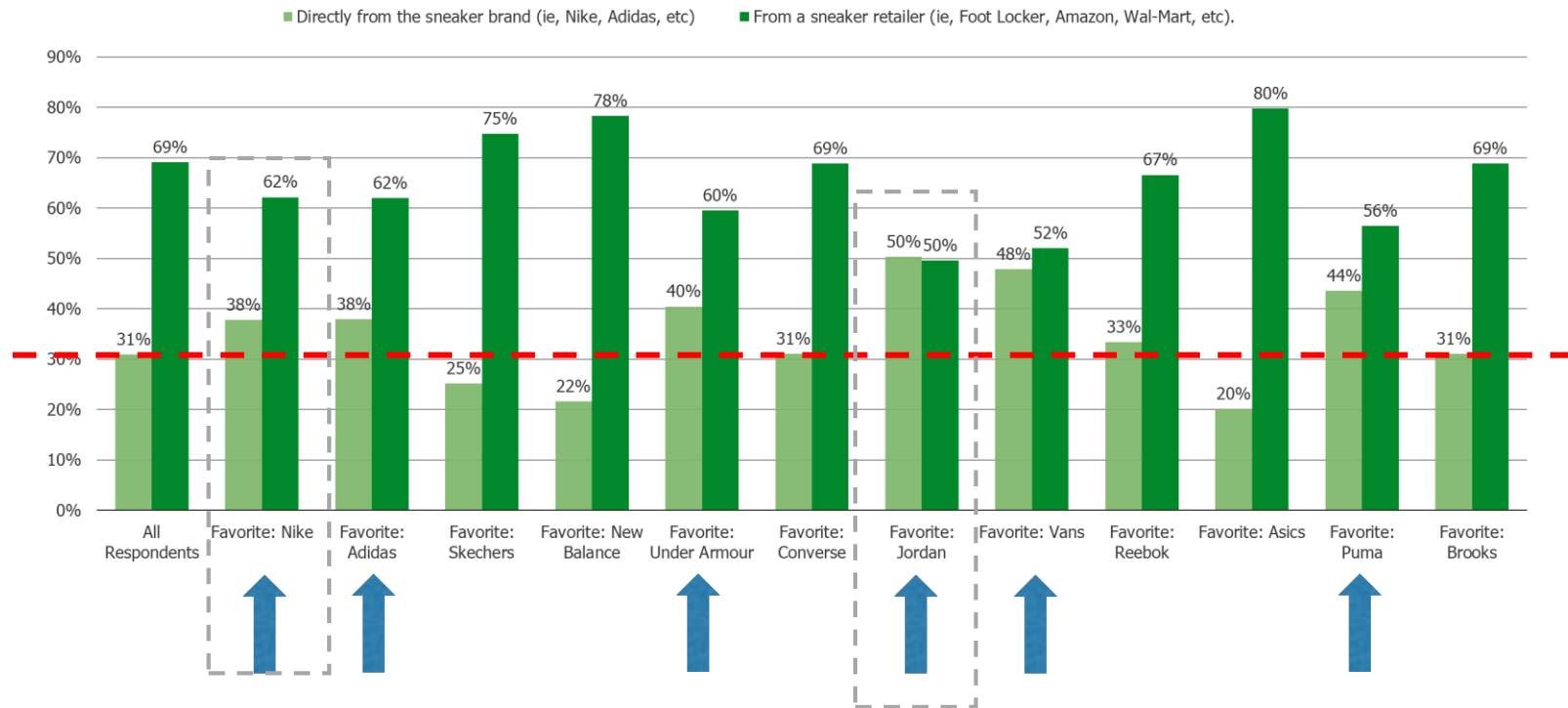
### POSED TO 18-34 YEAR-OLDS



## Nike and Jordan brand customers are among the most likely to go direct.

If you were buying sneakers today, would you get them directly from the sneaker brand's website/app/store? (Point in Time)

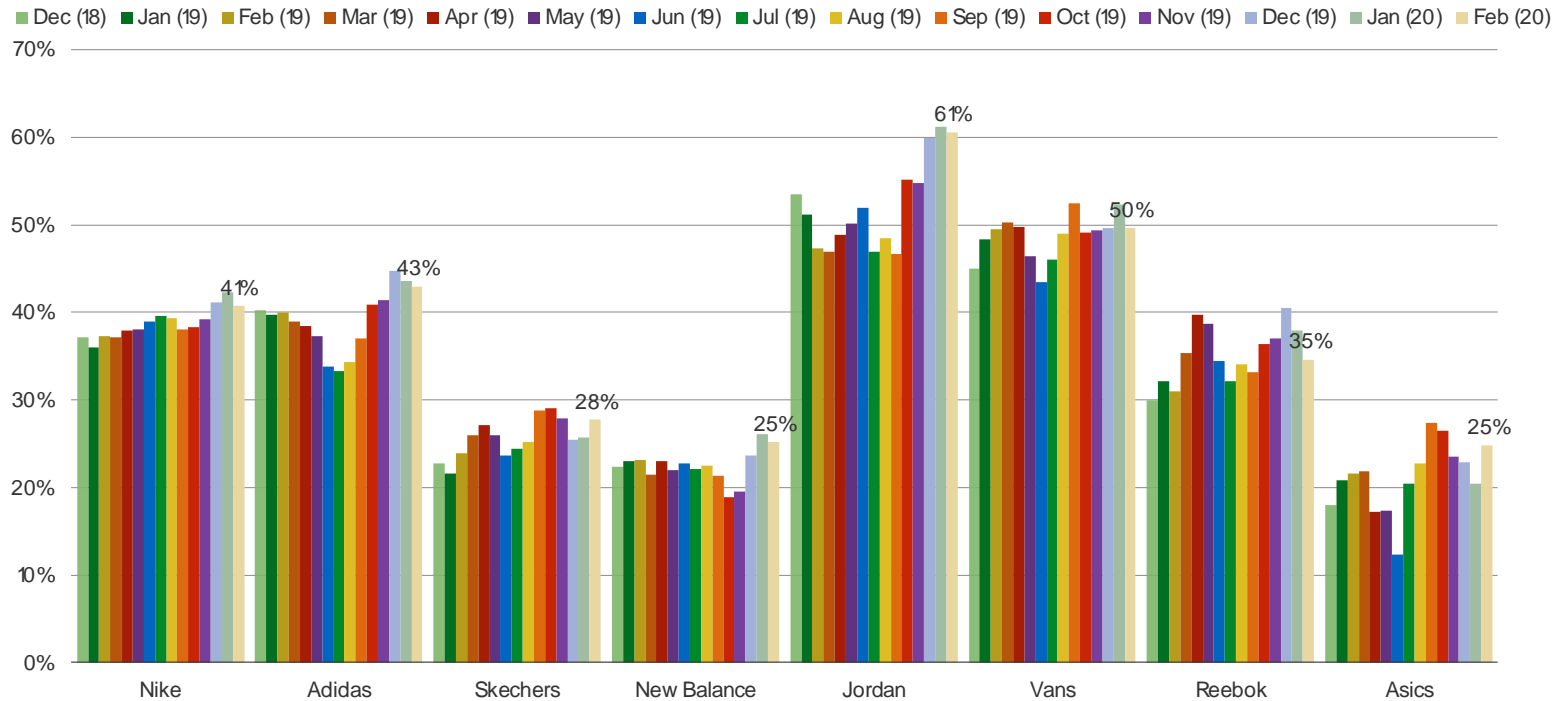
POSED TO RESPONDENTS WHO SAID THE FOLLOWING BRANDS ARE THEIR FAVORITES



# Over time, customers of Nike and Jordan have only gotten more and more likely to go direct.

## If you were buying sneakers today, would you get them directly from the sneaker brand's website/app/store? (Time Series)

POSED TO RESPONDENTS WHO SAID THE FOLLOWING BRANDS ARE THEIR FAVORITES



## II

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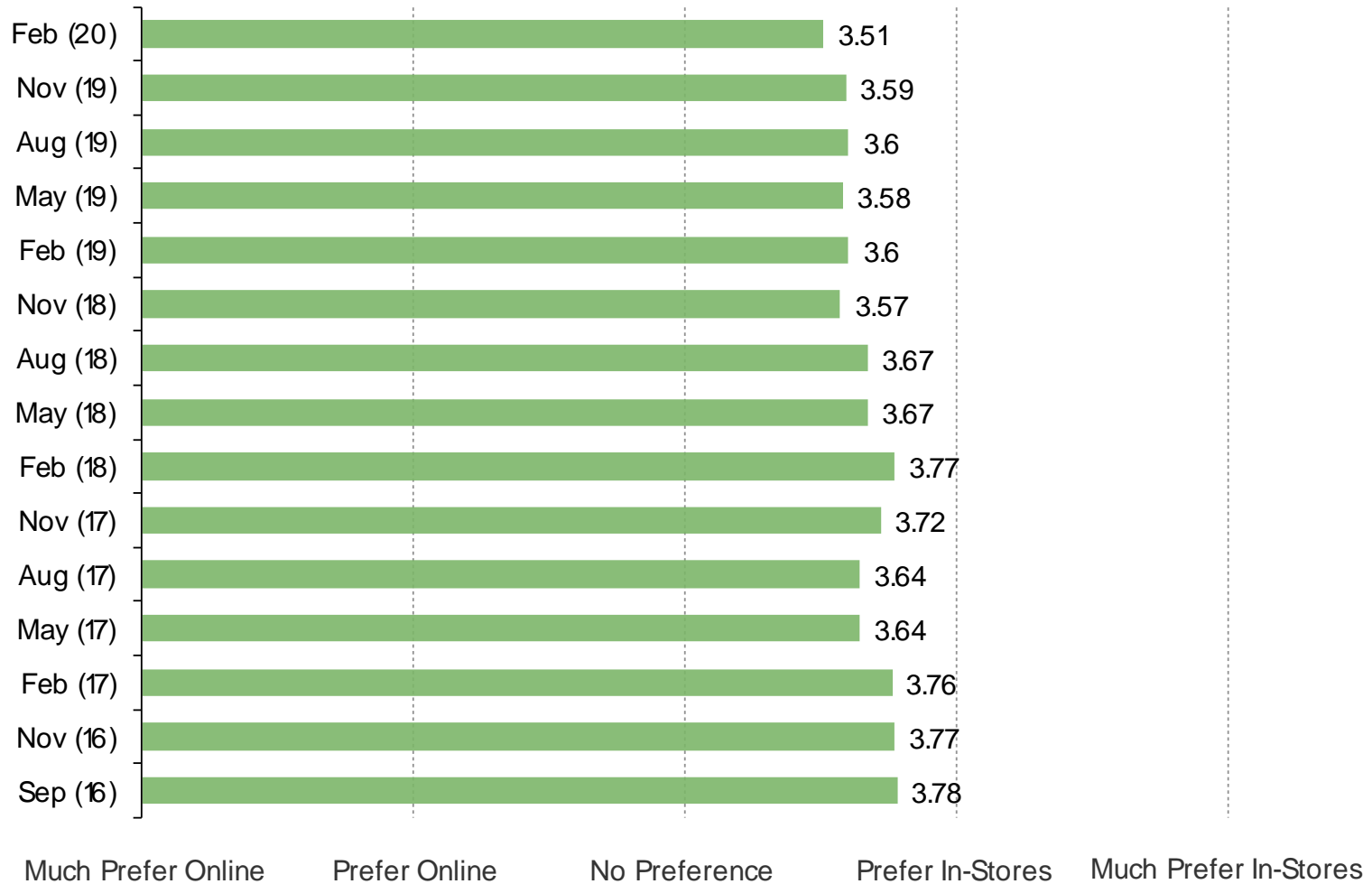
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# Consumer footwear shopping preferences are increasingly shifting toward online.

## Where do you prefer to buy sneakers?

POSED TO RESPONDENTS WHO SAID THE FOLLOWING BRANDS ARE THEIR FAVORITES

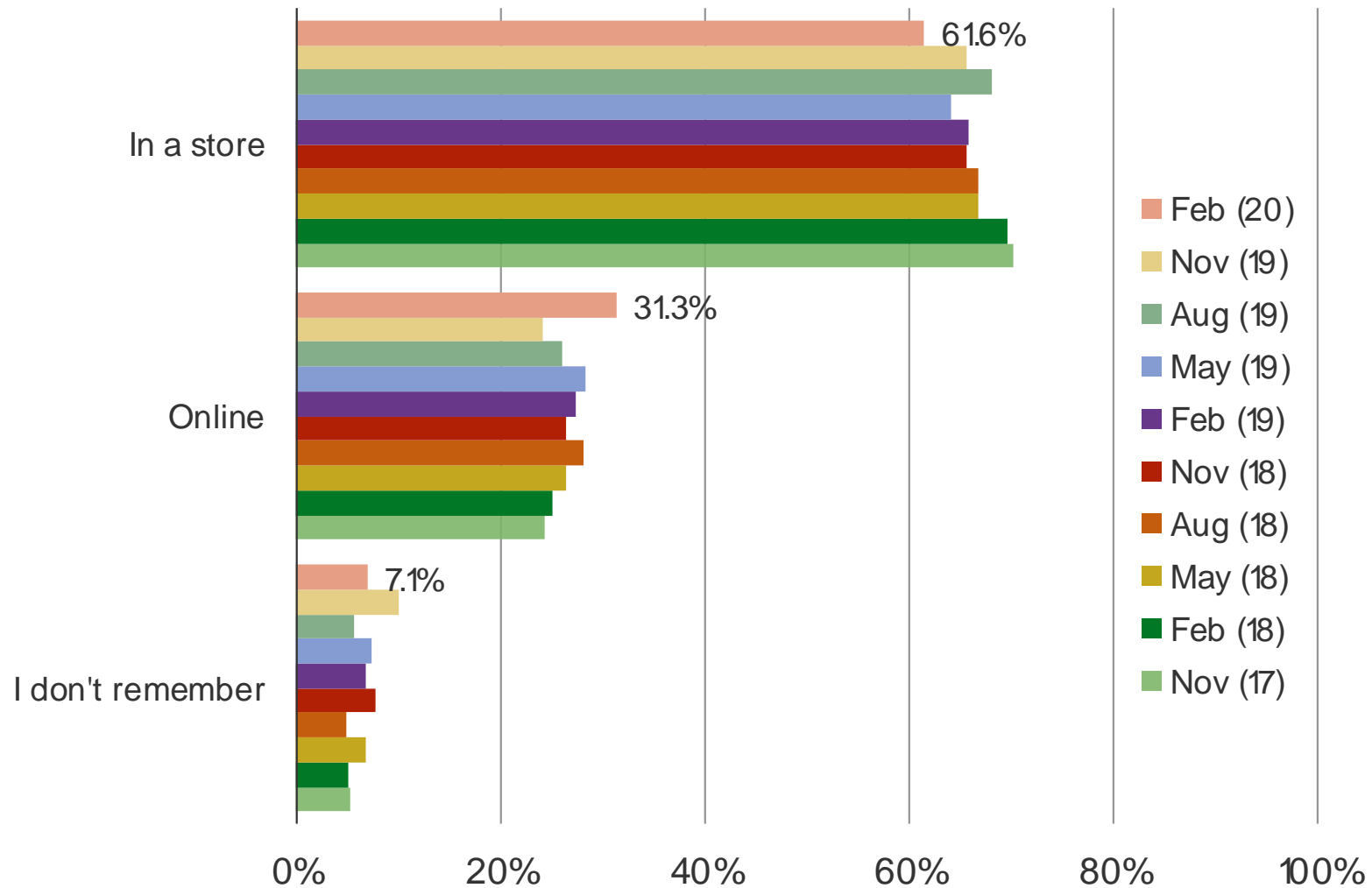




## A decreasing percentage of consumers bought their last pair of sneakers in a store.

Thinking of the last time you bought a pair of sneakers, did you buy them online or in a store?

POSED TO RESPONDENTS WHO SAID THE FOLLOWING BRANDS ARE THEIR FAVORITES



# III

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## Nike customers are among the most loyal.

Thinking about the last pair of sneakers that you purchased, which brand did you buy?

POSED TO RESPONDENTS WHO SAID THE FOLLOWING BRANDS ARE THEIR FAVORITES

Answer Choices	All Respondents	Favorite: Nike	Favorite: Adidas	Favorite: Skechers	Favorite: New Balance	Favorite: Under Armour	Favorite: Converse	Favorite: Jordan	Favorite: Vans	Favorite: Reebok	Favorite: Asics	Favorite: Puma	Favorite: Brooks
<b>Total</b>	N=22697	N=5886	N=1685	N=2008	N=2429	N=501	N=1012	N=1064	N=1003	N=726	N=864	N=550	N=378
Nike	23%	65%	12%	4%	5%	12%	9%	26%	12%	8%	6%	8%	6%
Adidas	7%	5%	56%	2%	2%	5%	5%	6%	4%	3%	3%	5%	3%
Skechers	10%	3%	2%	74%	4%	5%	5%	1%	2%	6%	2%	4%	1%
New Balance	11%	3%	4%	3%	72%	5%	4%	3%	2%	6%	5%	3%	3%
Under Armour	2%	2%	2%	1%	1%	50%	1%	2%	1%	2%	2%	3%	2%
Converse	4%	2%	3%	2%	1%	2%	49%	2%	6%	2%	1%	4%	2%
Jordan	4%	4%	2%	1%	1%	3%	2%	43%	3%	3%	1%	4%	2%
Vans	5%	3%	3%	1%	1%	3%	6%	8%	53%	2%	1%	5%	3%
Reebok	3%	2%	2%	2%	2%	3%	3%	2%	2%	54%	2%	3%	1%
Asics	4%	1%	2%	1%	2%	2%	2%	0%	1%	2%	71%	2%	2%
Puma	3%	2%	3%	1%	1%	2%	1%	3%	3%	2%	1%	47%	1%
Brookes	2%	1%	1%	0%	1%	0%	1%	1%	0%	1%	2%	1%	67%
None of the above/Other	22%	8%	9%	9%	8%	9%	13%	4%	9%	9%	5%	11%	7%

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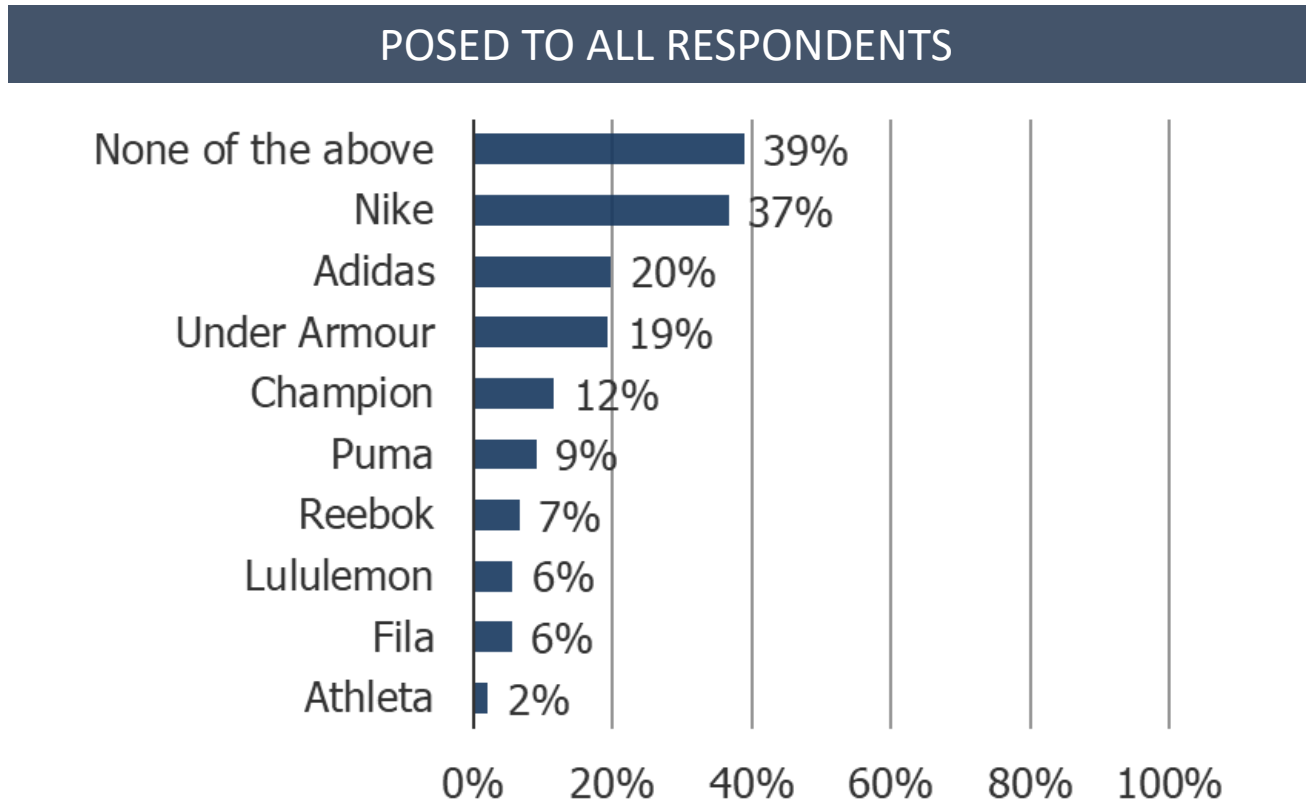
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## Nike is the most popular of all the brands tested for athletic clothing.

Do you regularly or occasionally wear athletic clothing from any of the following brands?



The shift toward using athletic clothing for casual wear is largely being driven by younger cohorts. Suggesting the trend will continue as the population ages.

## What do you use athletic clothing for?

### ALL RESPONDENTS, BROKEN DOWN BY AGE

	Total	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75 or older
	N=1508	N=265	N=319	N=323	N=286	N=165	N=75	N=75
To wear casually	25%	21%	23%	28%	28%	29%	27%	21%
both casual and exercise	36%	43%	40%	37%	36%	26%	23%	24%
To exercise	18%	20%	21%	21%	14%	18%	16%	8%
I don't wear athletic clothing	21%	15%	16%	15%	23%	27%	35%	47%



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**Nike and Under Armour are viewed by customers as being superior to competition when it comes to athletic performance.**

**In your opinion, how does this brand’s clothing compare to competitive options when it comes to athletic performance.**

**POSED TO RESPONDENTS WHO WEAR EACH OF THE FOLLOWING BRANDS**

	<b>Nike</b> N=553	<b>Under Armour</b> N=292	<b>Lululemon</b> N=86	<b>Fila</b> N=84	<b>Puma</b> N=137	<b>Adidas</b> N=298	<b>Champion</b> N=174	<b>Athleta</b> N=32	<b>Reebok</b> N=101
Inferior to competition	9%	11%	22%	23%	13%	10%	11%	6%	5%
Same as competition	48%	48%	47%	54%	61%	54%	65%	56%	72%
Superior to competition	42%	41%	31%	24%	26%	36%	24%	38%	23%

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## Consumer perceptions toward Nike in China are very positive.

### What are your perceptions toward the following brands?

#### RESPONDENTS IN CHINA

