

BESPOKE SURVEYS

US Footwear Vol 24

1250+ Consumers Per Wave

CHECK BREAKDOWN:**TREND CHECKS****FOOTWEAR PURCHASING PREFERENCES**

Over the history of our survey, we have seen shifts in consumer preferences in the direction of buying footwear direct and buying online. The data has been flatter sequentially in recent waves, but over time preferences are bending toward direct and online. Our cross-tab analysis continues to show that younger respondents and more active footwear purchasers prefer to buy direct and online. Preferences to buy online gained considerably during the pandemic. The % who prefers to buy online remains above pre-pandemic levels, but over the past year in-store has recovered some of its share losses to online.

FOOTWEAR PURCHASE FREQUENCY

Over time, the percentage of consumers who buy more than one pair of sneakers per year has increased (and less than one pair per year has declined considerably).

FOOTWEAR BRANDS COLOR

Data was mostly constructive toward footwear brands that we ask about in our survey. Nike continues to test well with consumers and brands like Hey Dude, Common Projects, and Veja received strong sentiment scores. Skechers feedback has also improved in recent quarters in our survey.

FOOTWEAR RETAILERS COLOR

With regard to footwear retailers, Footlocker has recovered some ground when it comes to some of the KPIs we track that were negatively impacted during the pandemic.

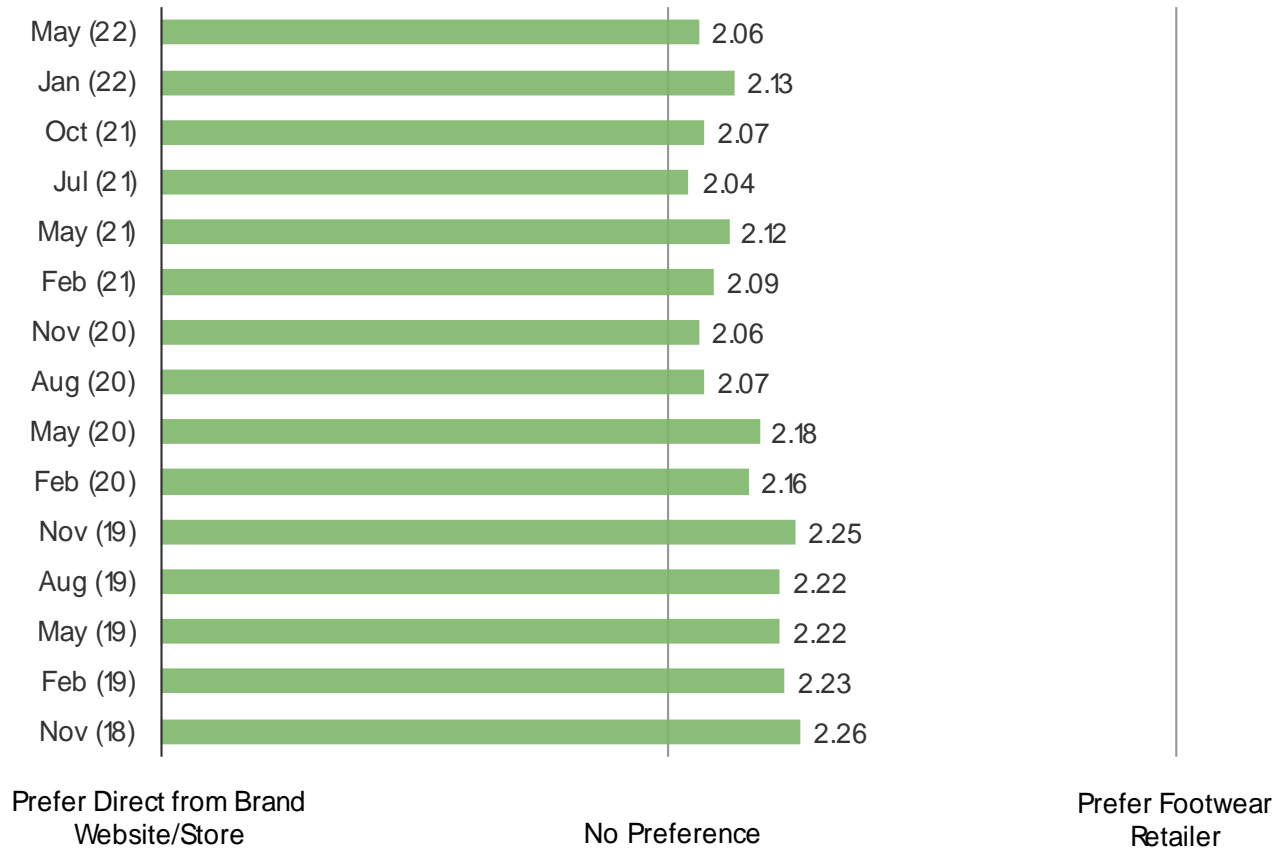
ATHLETIC APPAREL NOTES

The % of consumers who use athletic clothing continues to be on the rise. Nike and Lululemon stick out as brands that have seen consumer feedback/sentiment improve sequentially.

FOOTWEAR PURCHASE PREFERENCES

WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

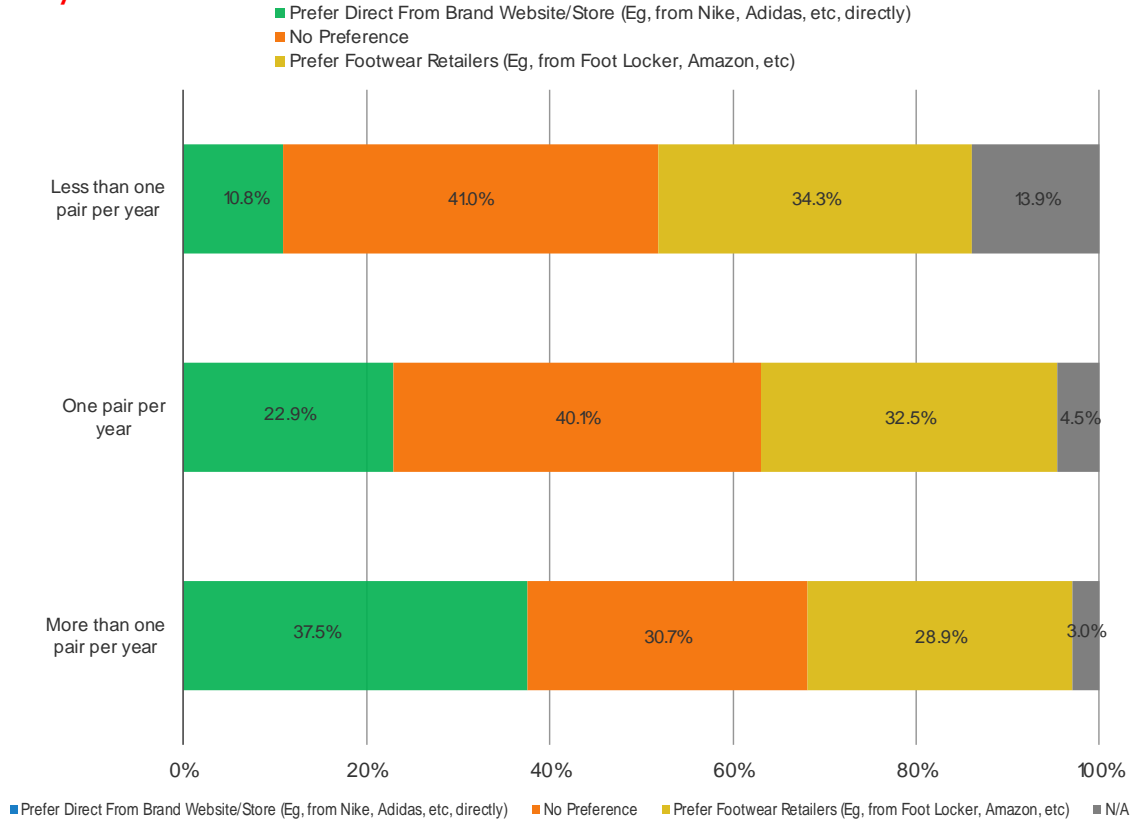
Posed to all respondents



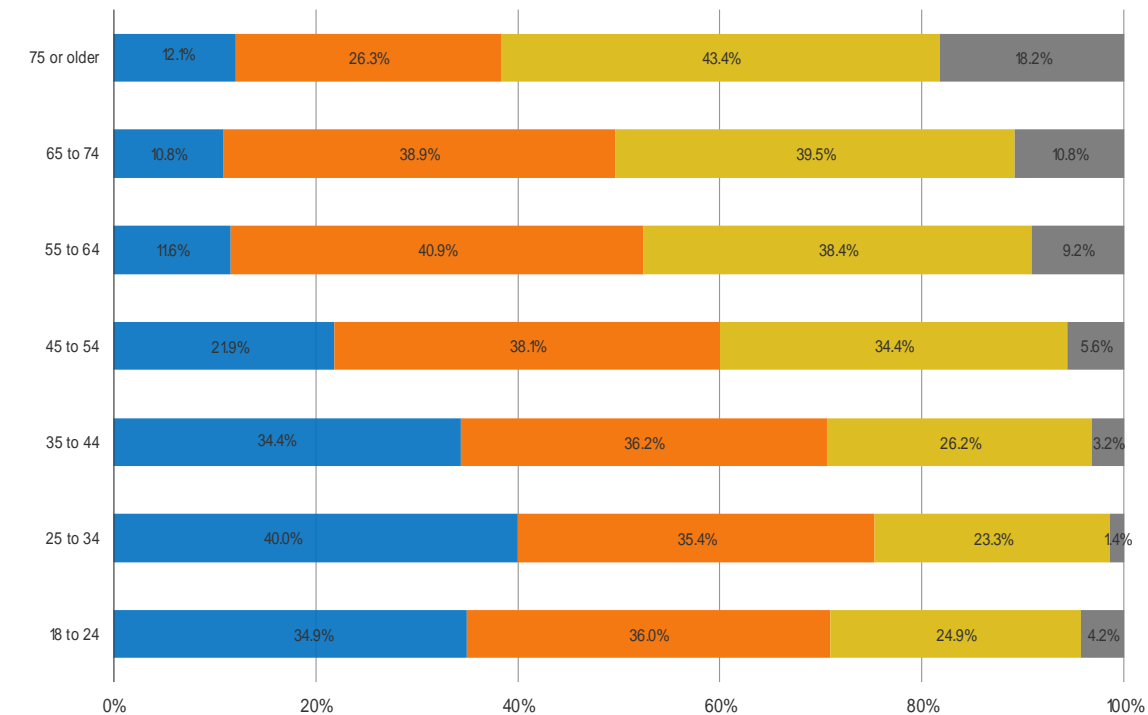
WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

Cross-Tab Analysis

By How Often Consumers Buy Footwear

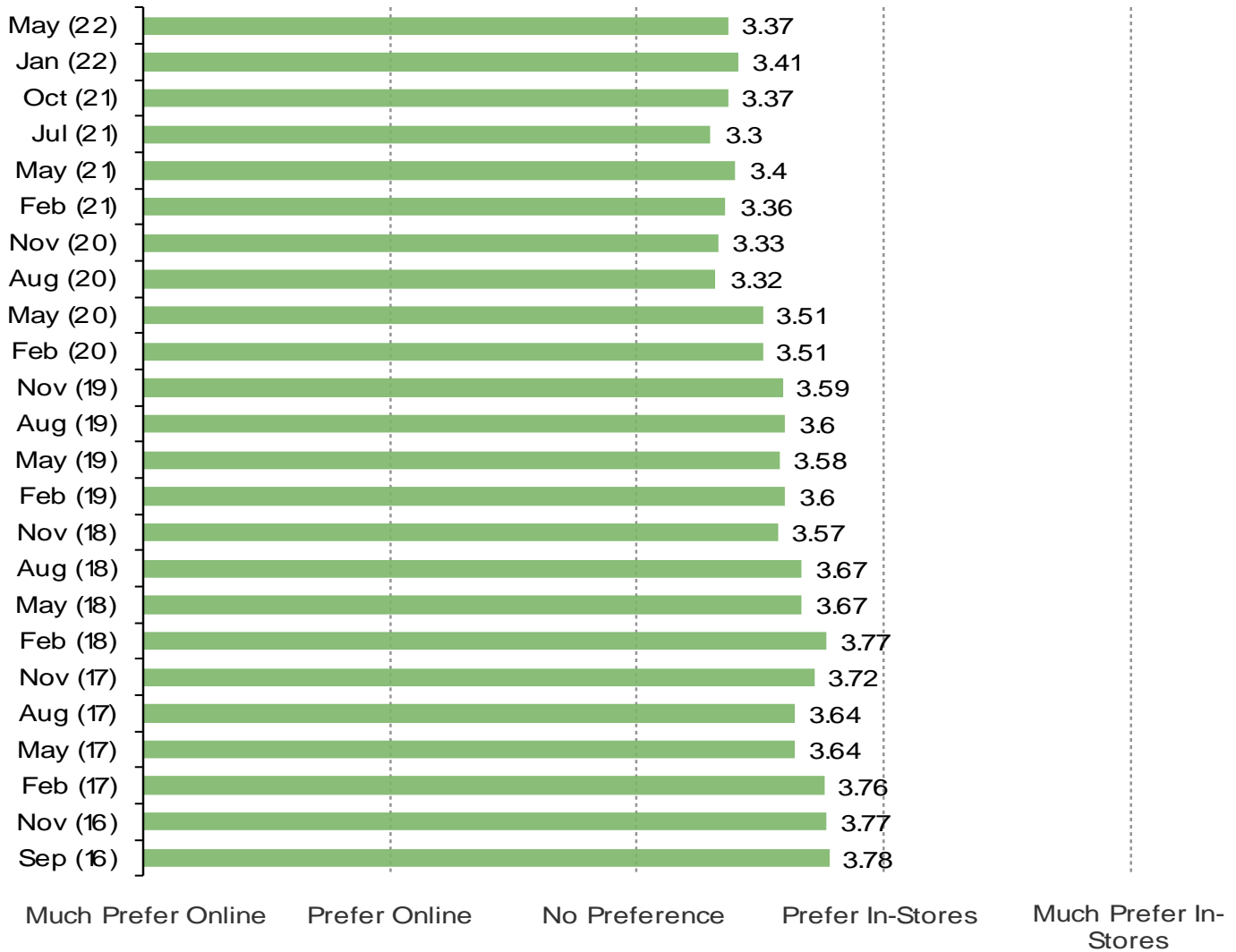


By Age



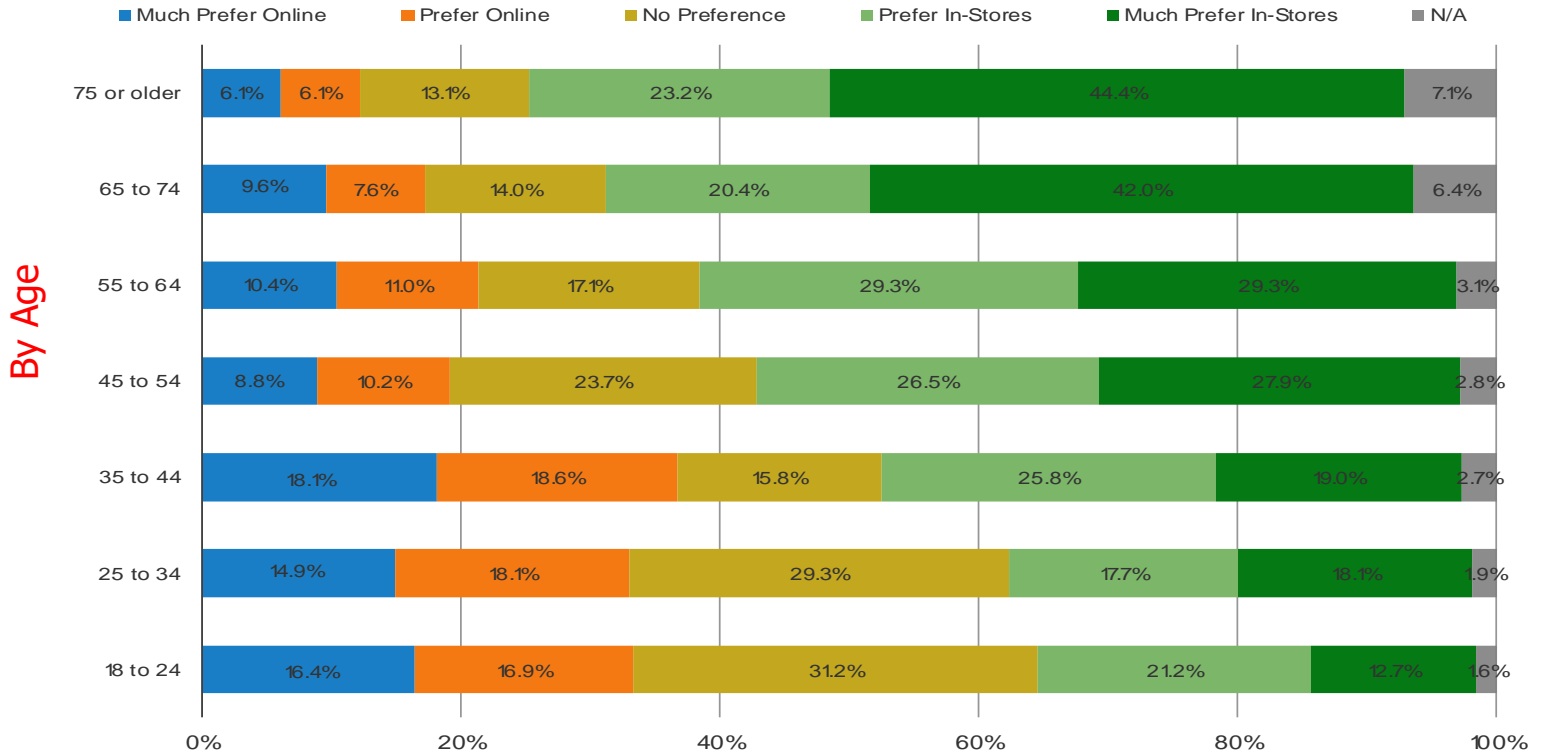
WHERE DO YOU PREFER TO BUY SNEAKERS?

Posed to all respondents



WHERE DO YOU PREFER TO BUY SNEAKERS?

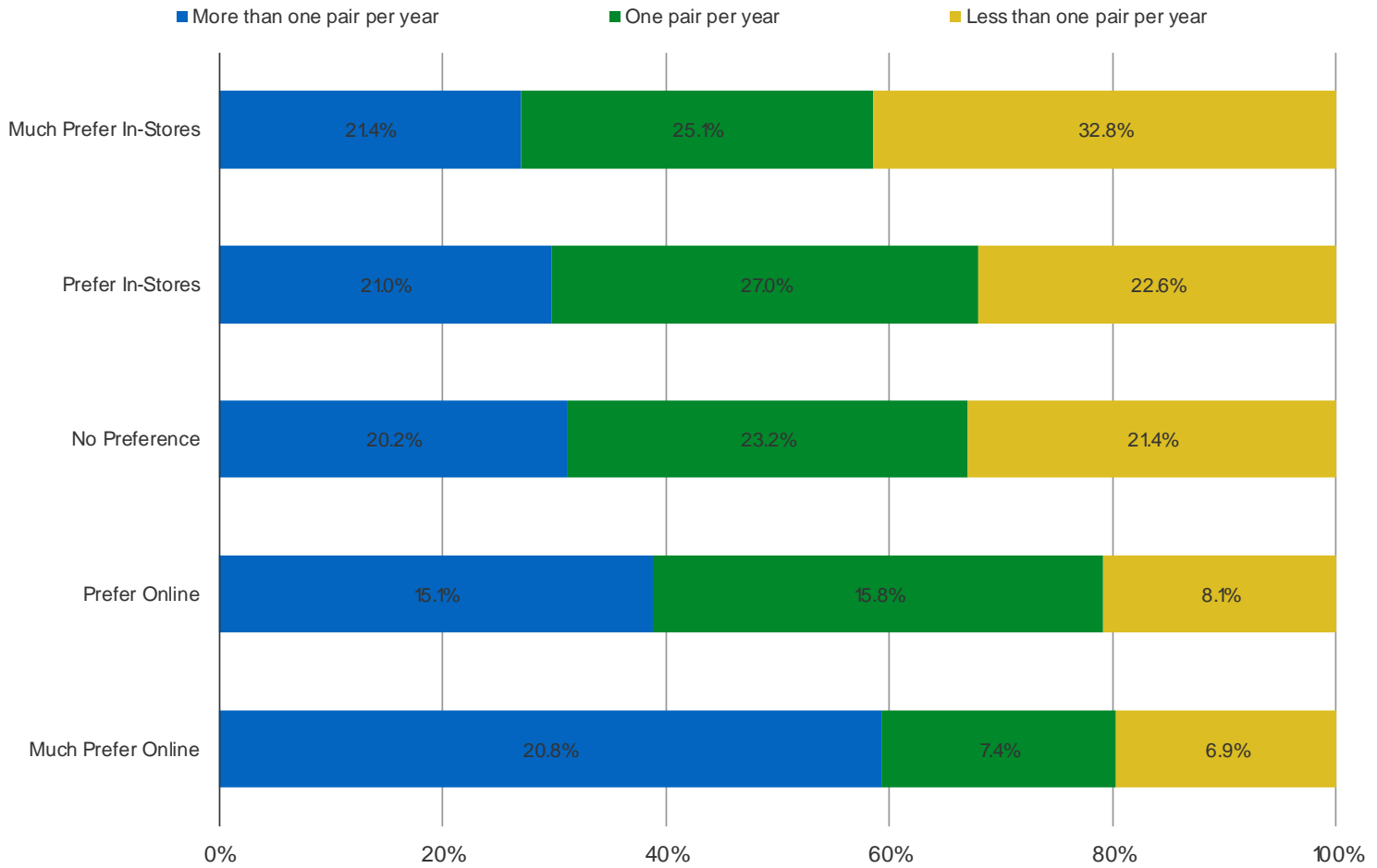
Cross-Tab Analysis



HOW MANY PAIRS OF FOOTWEAR DO YOU BUY PER YEAR?

Cross-Tab Analysis

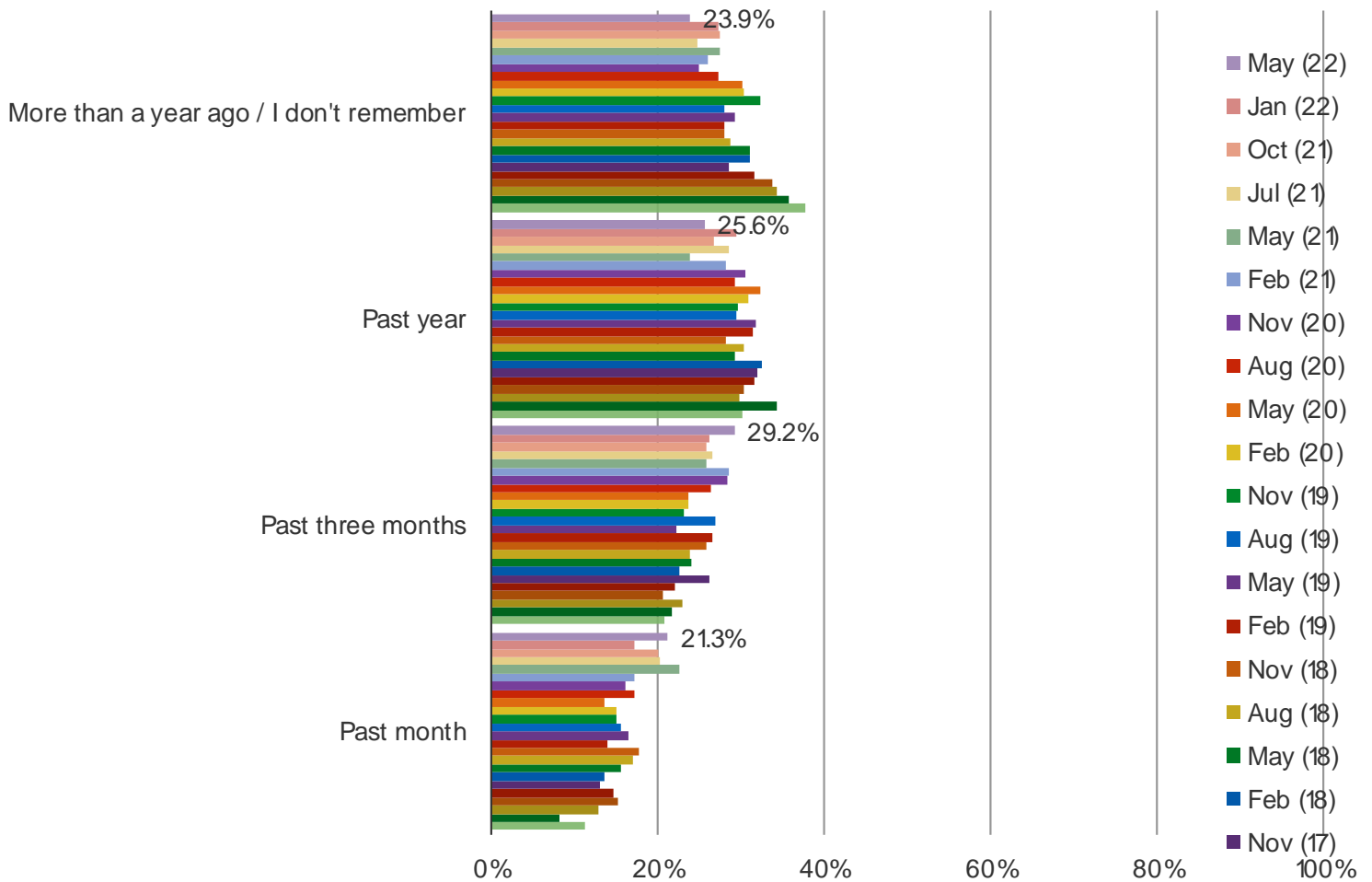
By How Consumers Prefer To Buy Footwear



SNEAKER BUYING TRENDS

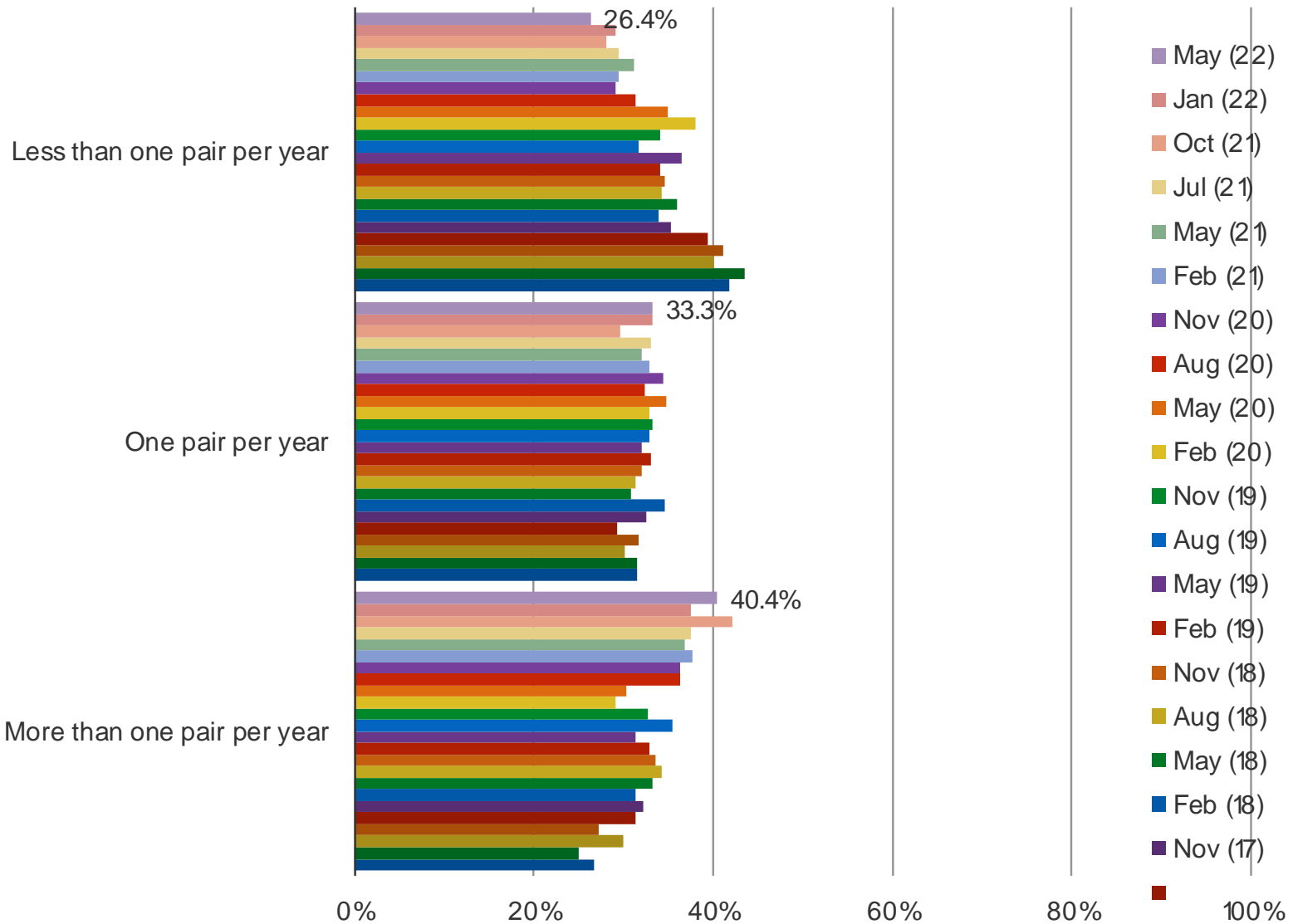
WHEN IS THE LAST TIME YOU BOUGHT A NEW PAIR OF SNEAKERS?

Posed to all respondents



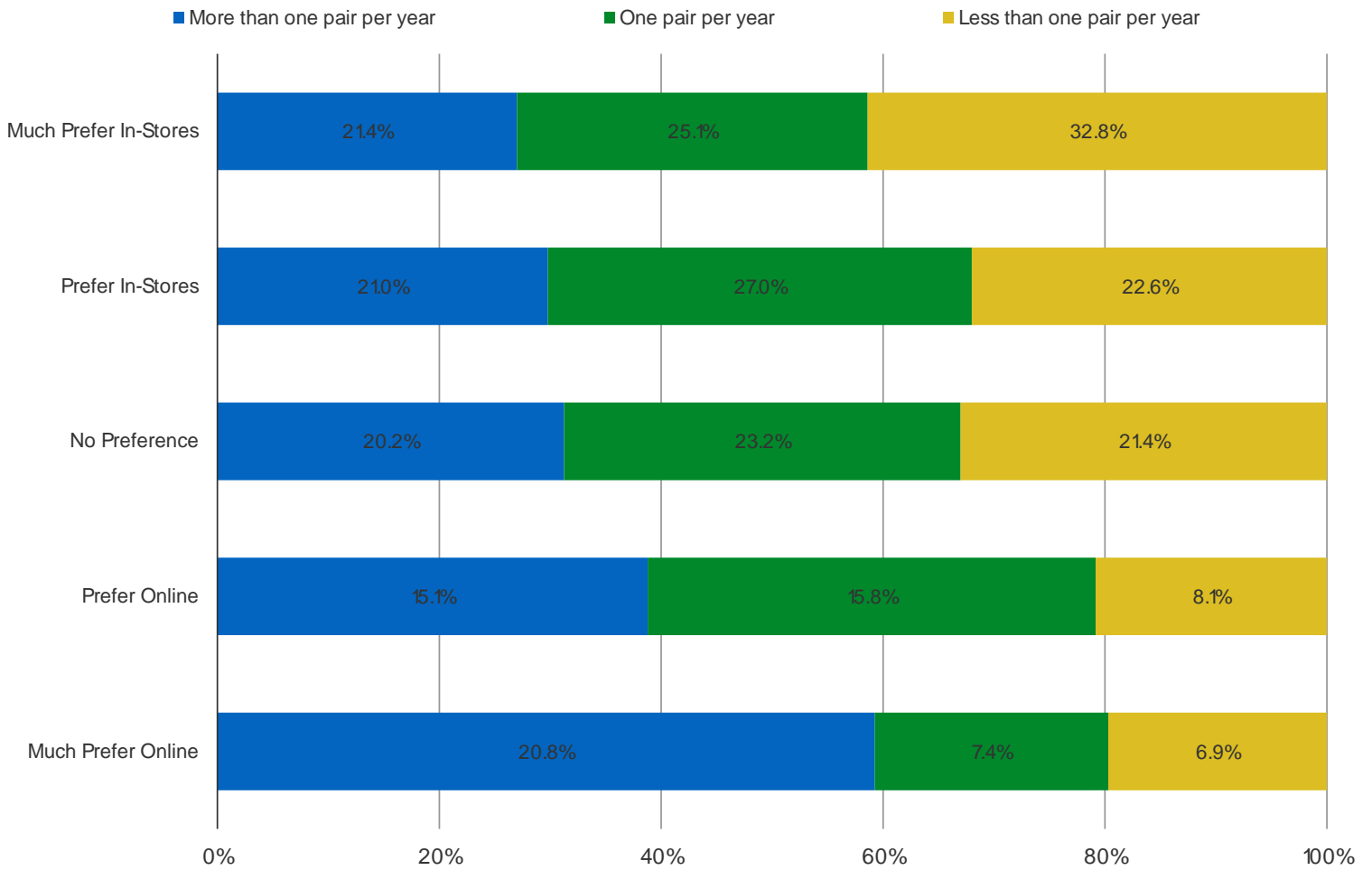
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

Posed to all respondents



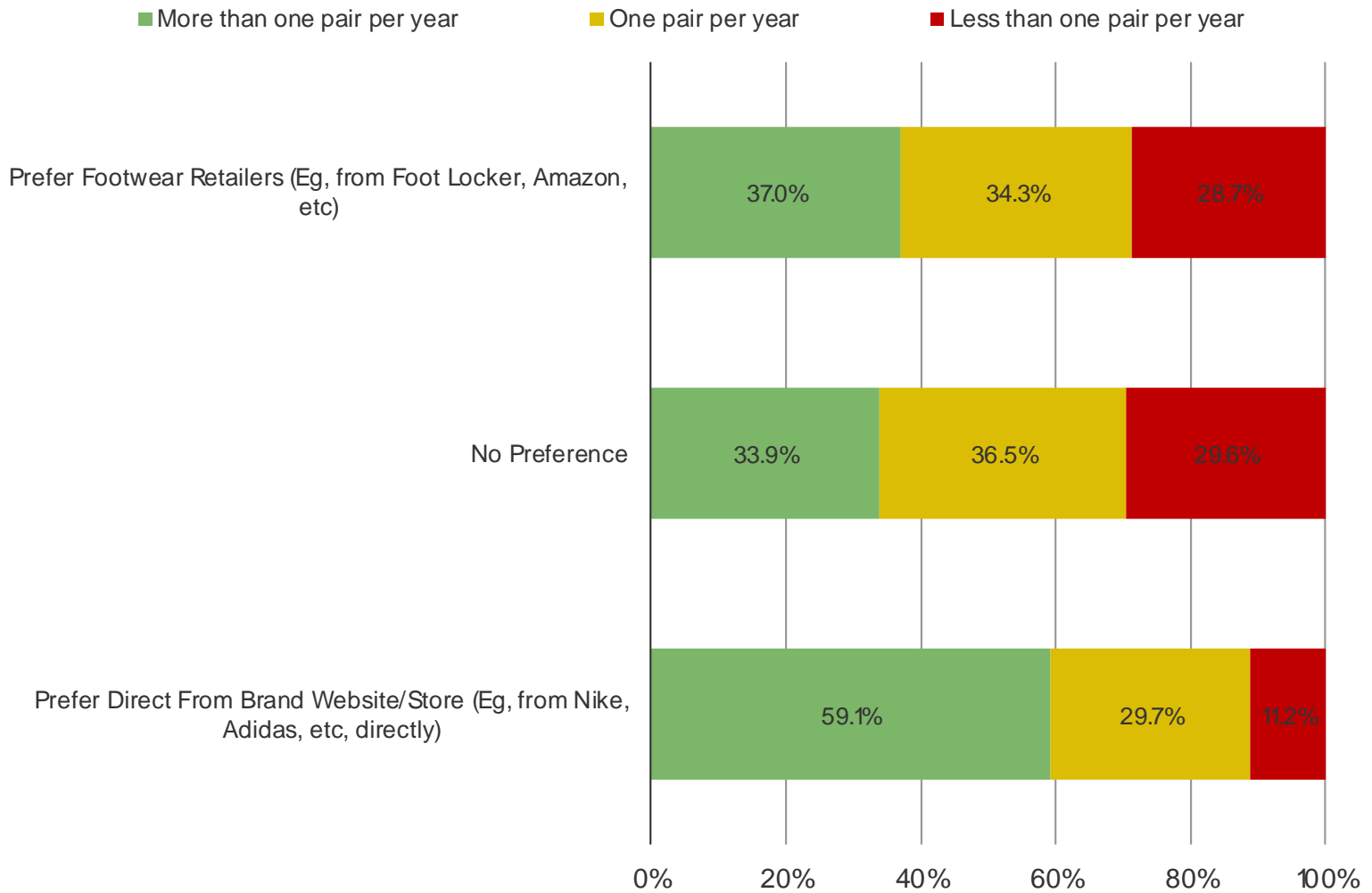
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

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



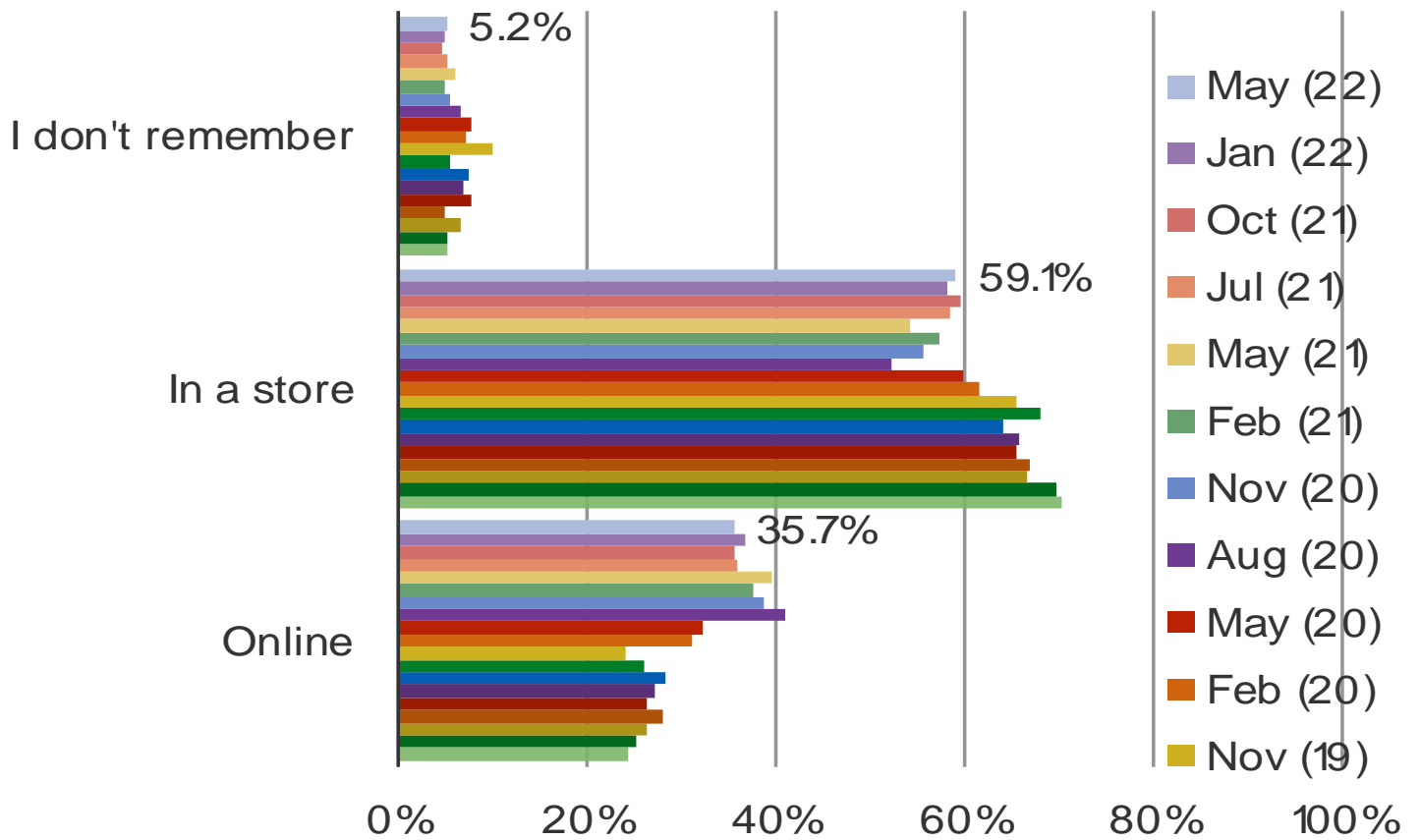
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

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?

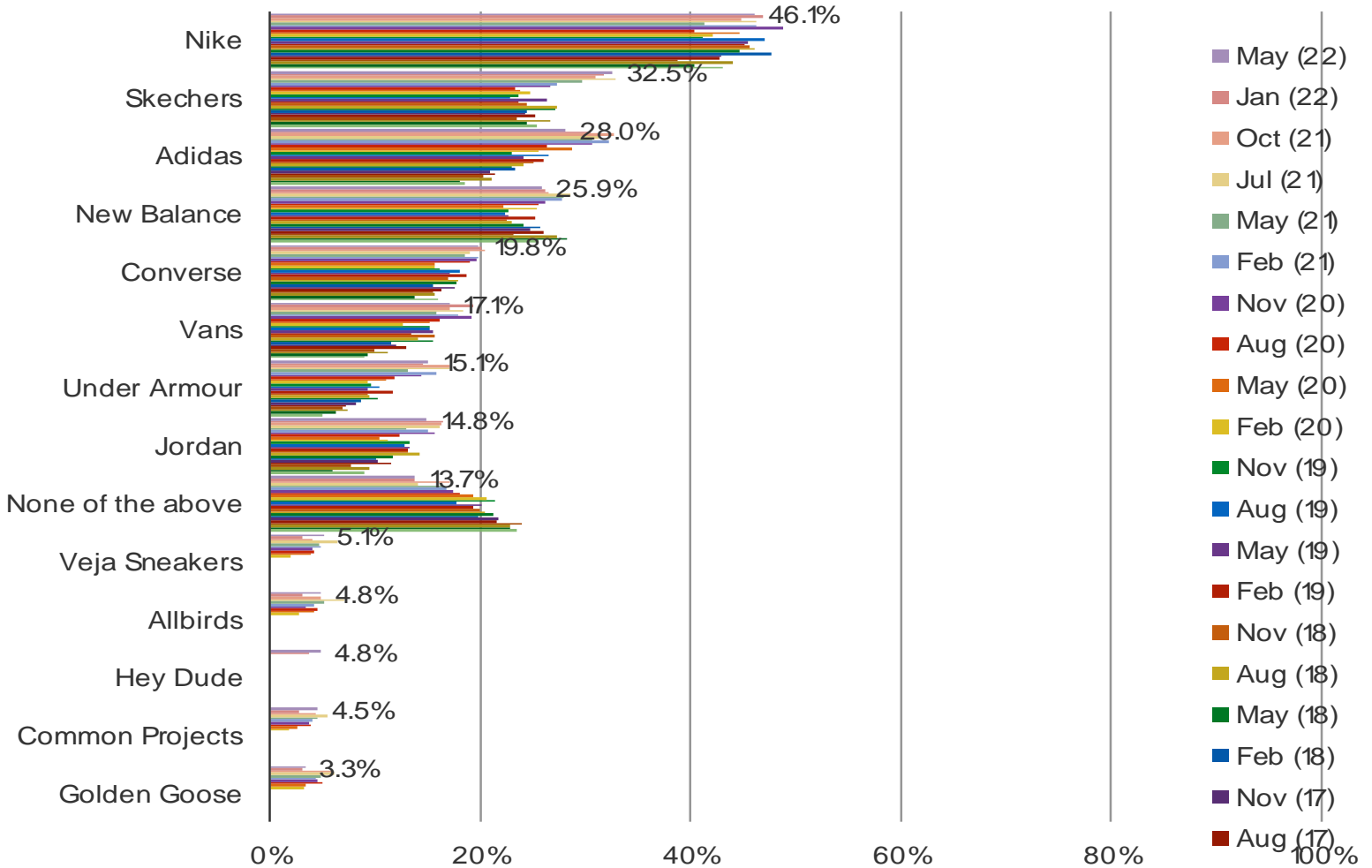
Posed to all respondents



SNEAKER BRANDS

WHICH OF THE FOLLOWING BRANDS DO YOU OWN SNEAKERS FROM?

Posed to all respondents



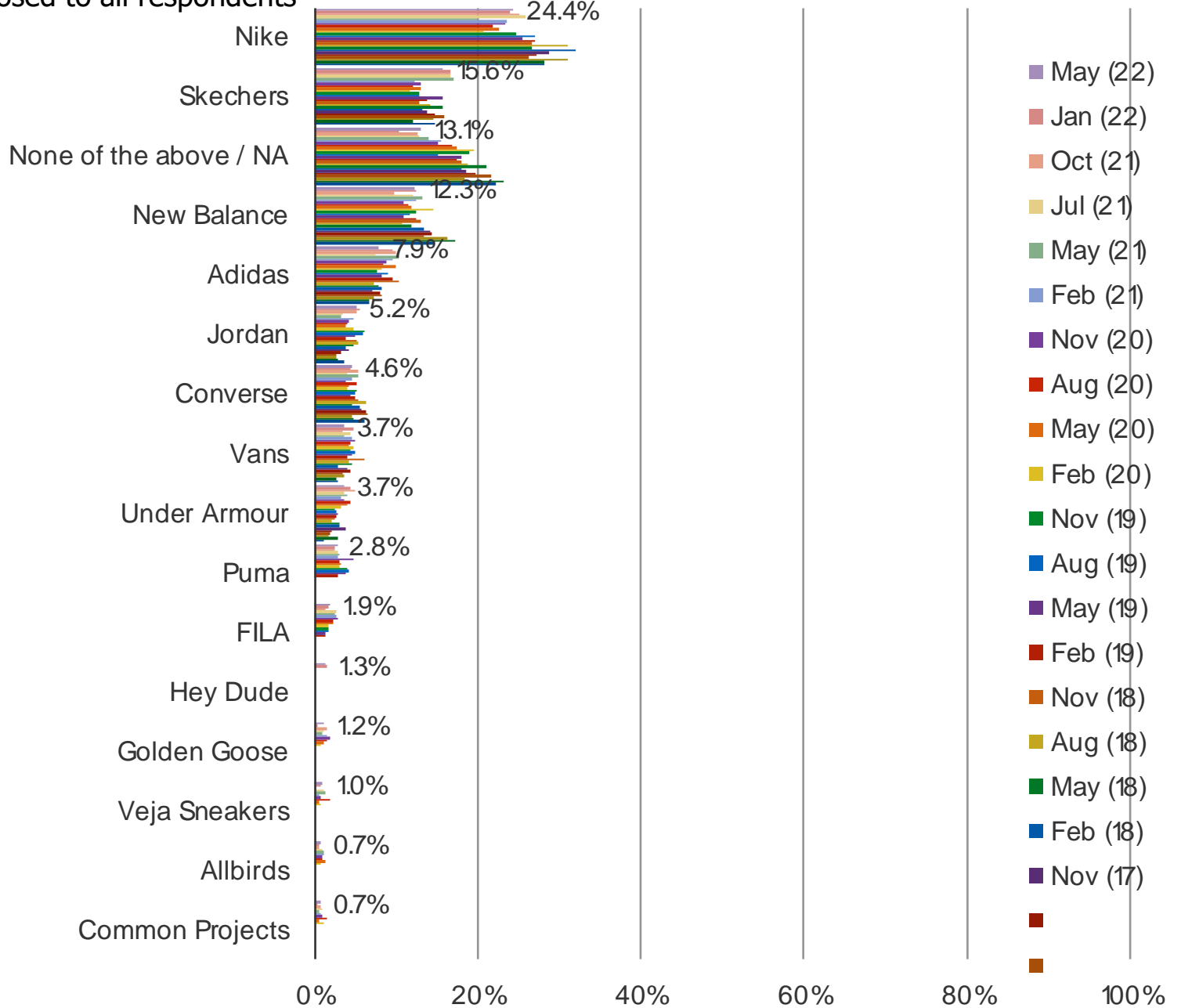
Looking into Their Soles

Audience: 1,250 US Consumers

Date: May 2022

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

Posed to all respondents



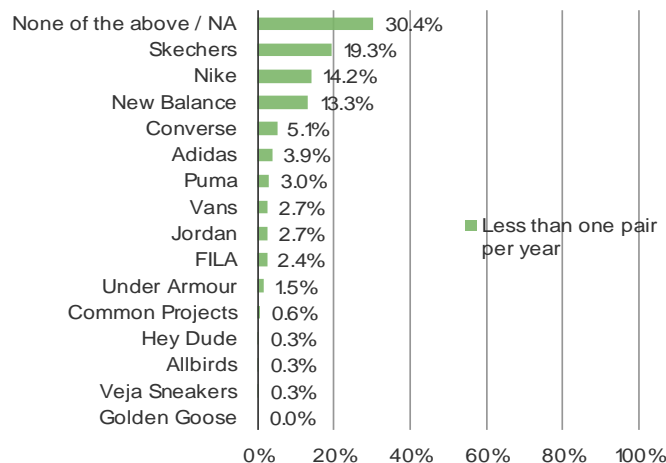
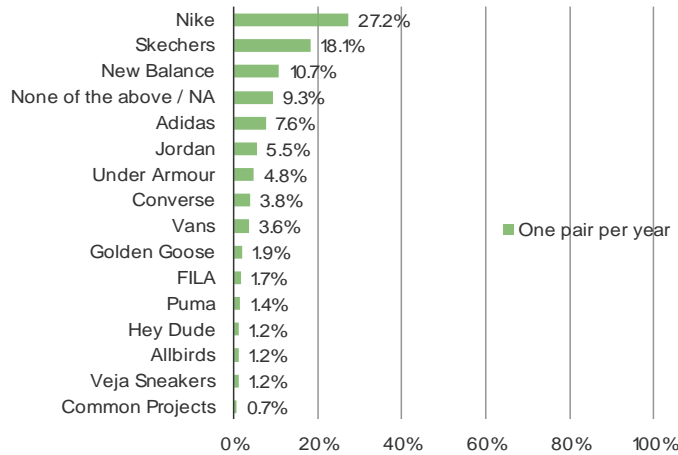
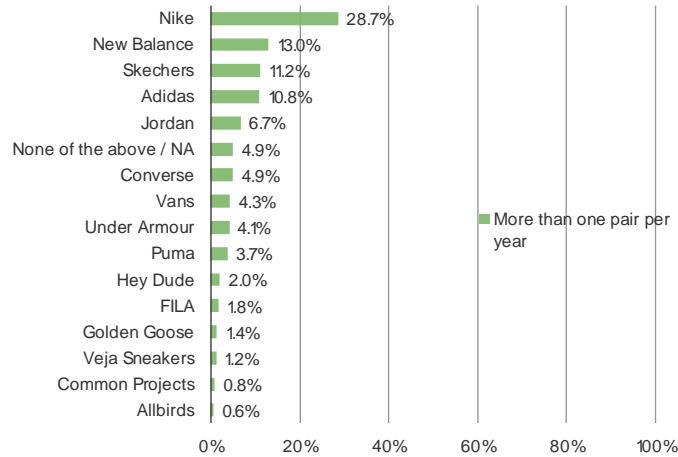
Looking into Their Soles

Audience: 1,250 US Consumers

Date: May 2022

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.



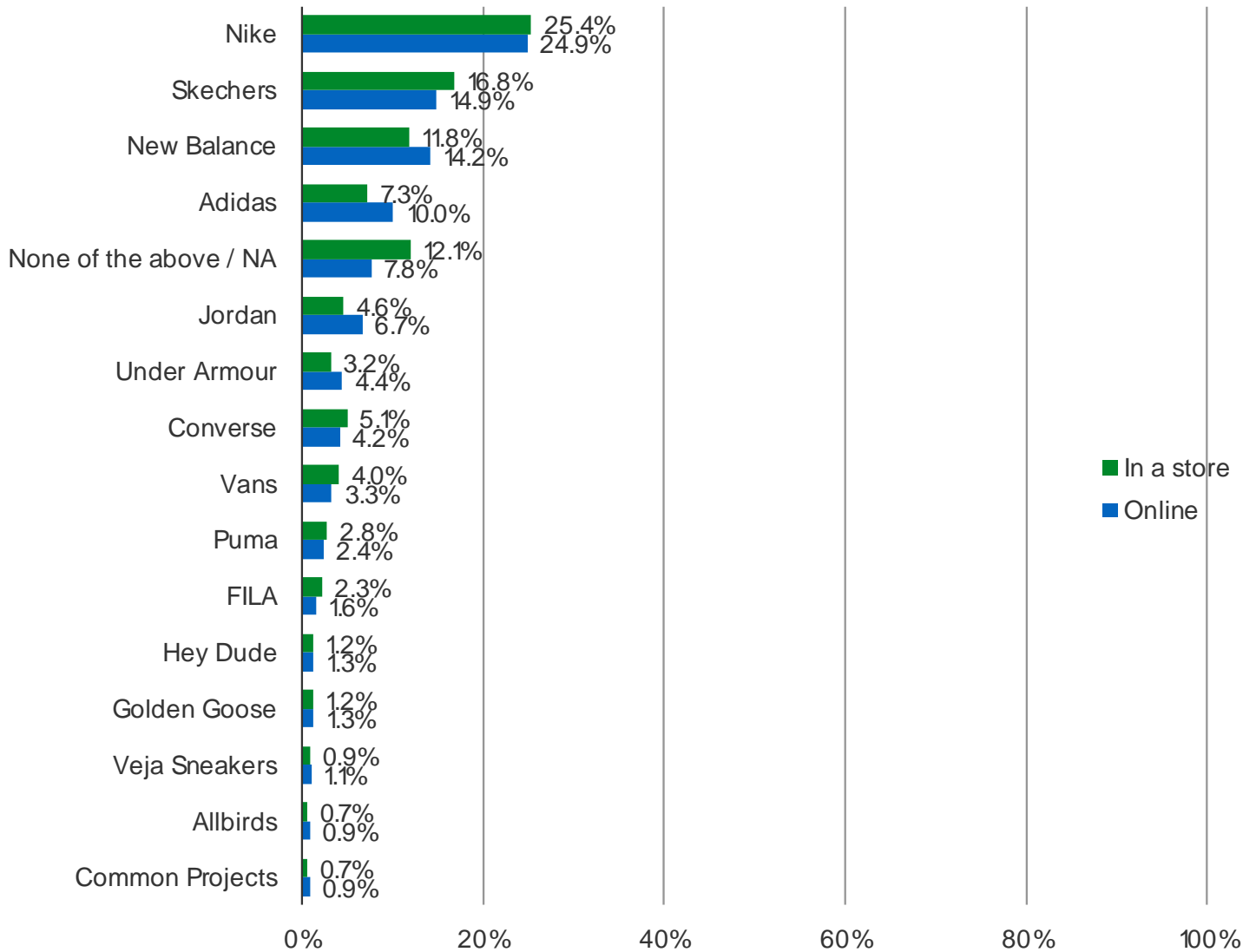
Looking into Their Soles

Audience: 1,250 US Consumers

Date: May 2022

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 those who prefer to buy online vs. in-stores.



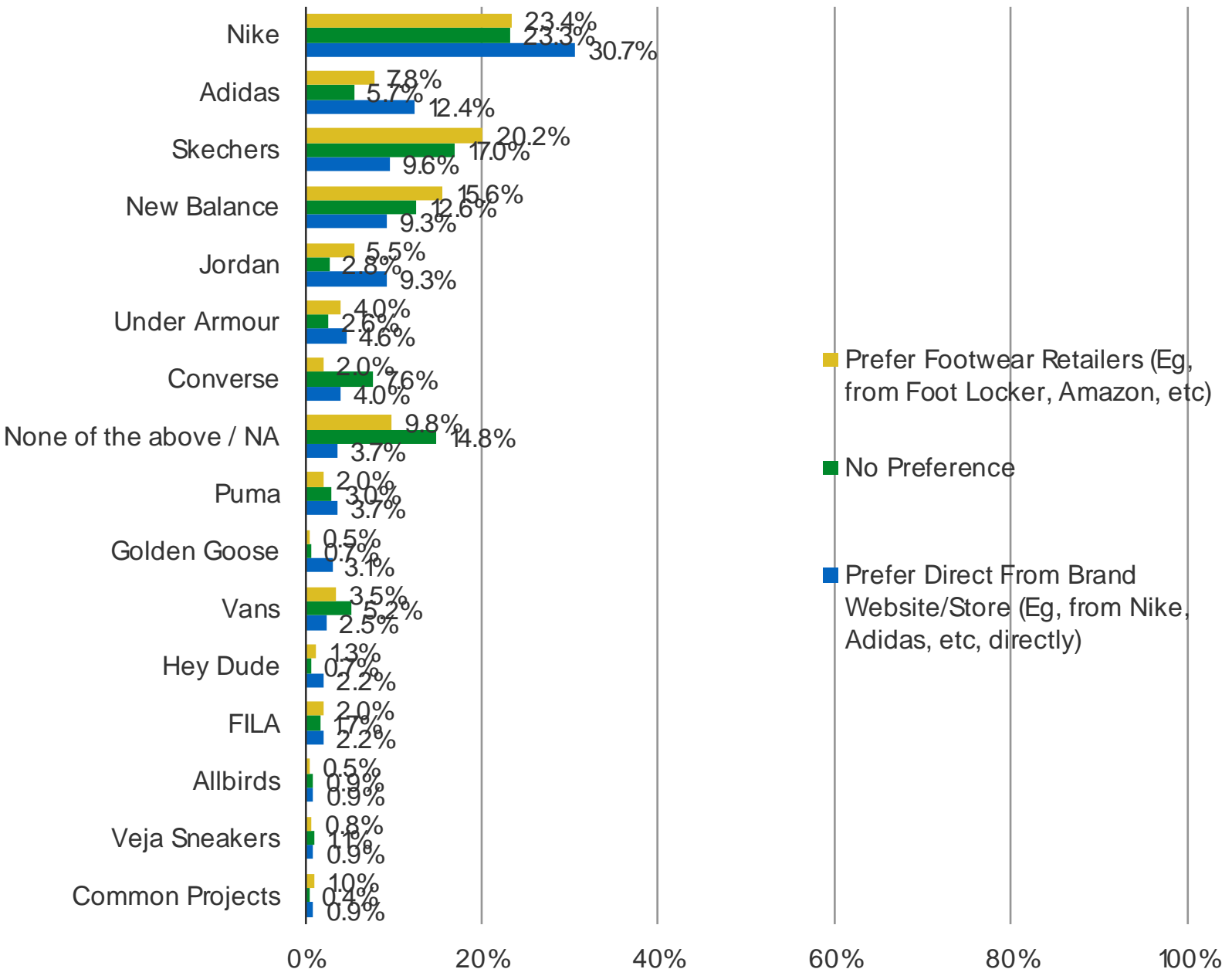
Looking into Their Soles

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Date: May 2022

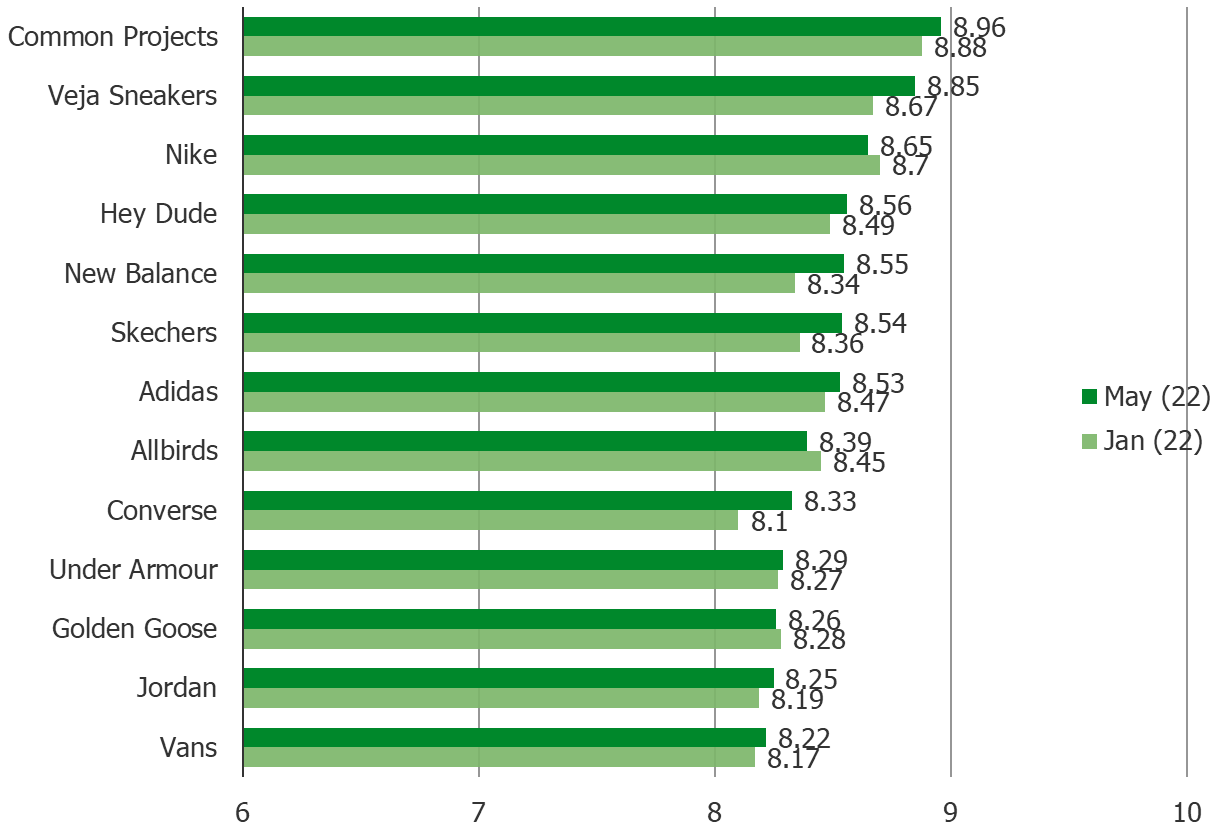
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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



WHAT IS YOUR OPINION OF THE FOLLOWING BRANDS?

Posed to respondents who have heard of each of the following:



Weighted Average Guide:

11 point scale, 1 = Very Negative, 11 = Very Positive

	N =
Adidas	926
Skechers	851
Nike	995
Jordan	778
Under Armour	641
Converse	825
Vans	703
New Balance	799
Common Projects	68
Golden Goose	106
Veja Sneakers	65
Allbirds	166
Hey Dude	141
Crocs	778

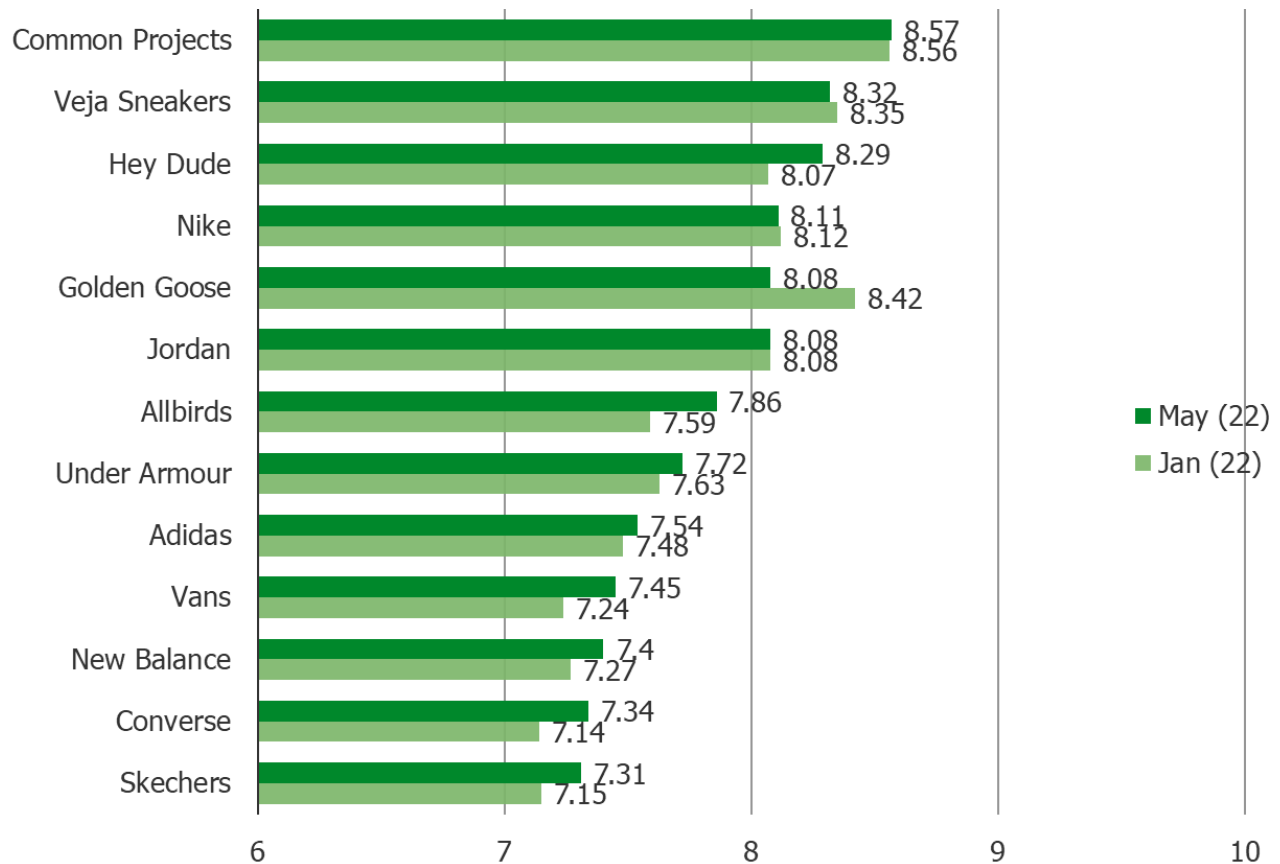
Looking into Their Soles

Audience: 1,250 US Consumers

Date: May 2022

IN YOUR OPINION, HOW MUCH PRICING POWER DO THE FOLLOWING FOOTWEAR BRANDS POSSESS? IE – HOW MUCH CAN THEY RAISE PRICES WITHOUT IMPACTING HOW DESIRABLE THEY ARE TO PURCHASE?

Posed to respondents who have heard of each of the following:



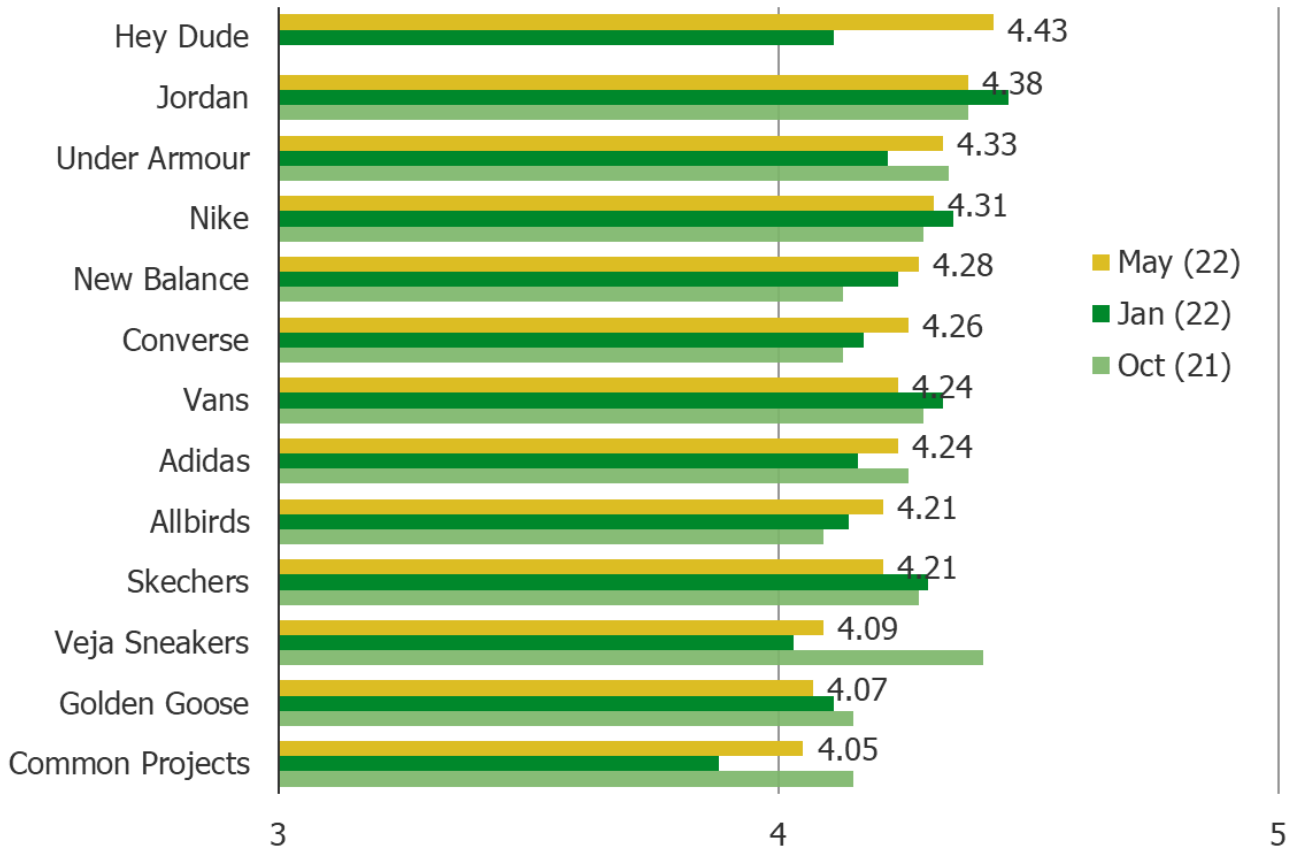
Weighted Average Guide:

11 point scale, 1 = Very Weak Pricing, 11 = Very Strong Pricing

	N =
Adidas	926
Skechers	851
Nike	995
Jordan	778
Under Armour	641
Converse	825
Vans	703
New Balance	799
Common Projects	68
Golden Goose	106
Veja Sneakers	65
Allbirds	166
Hey Dude	141
Crocs	778

HOW LIKELY ARE YOU TO BUY SNEAKERS FROM THE FOLLOWING BRANDS AGAIN IN THE FUTURE?

Posed to respondents who own footwear from each of the following.



Weighted Average Guide:

5 point scale

1 = Very Unlikely

2 = Unlikely

3 = Somewhat Likely

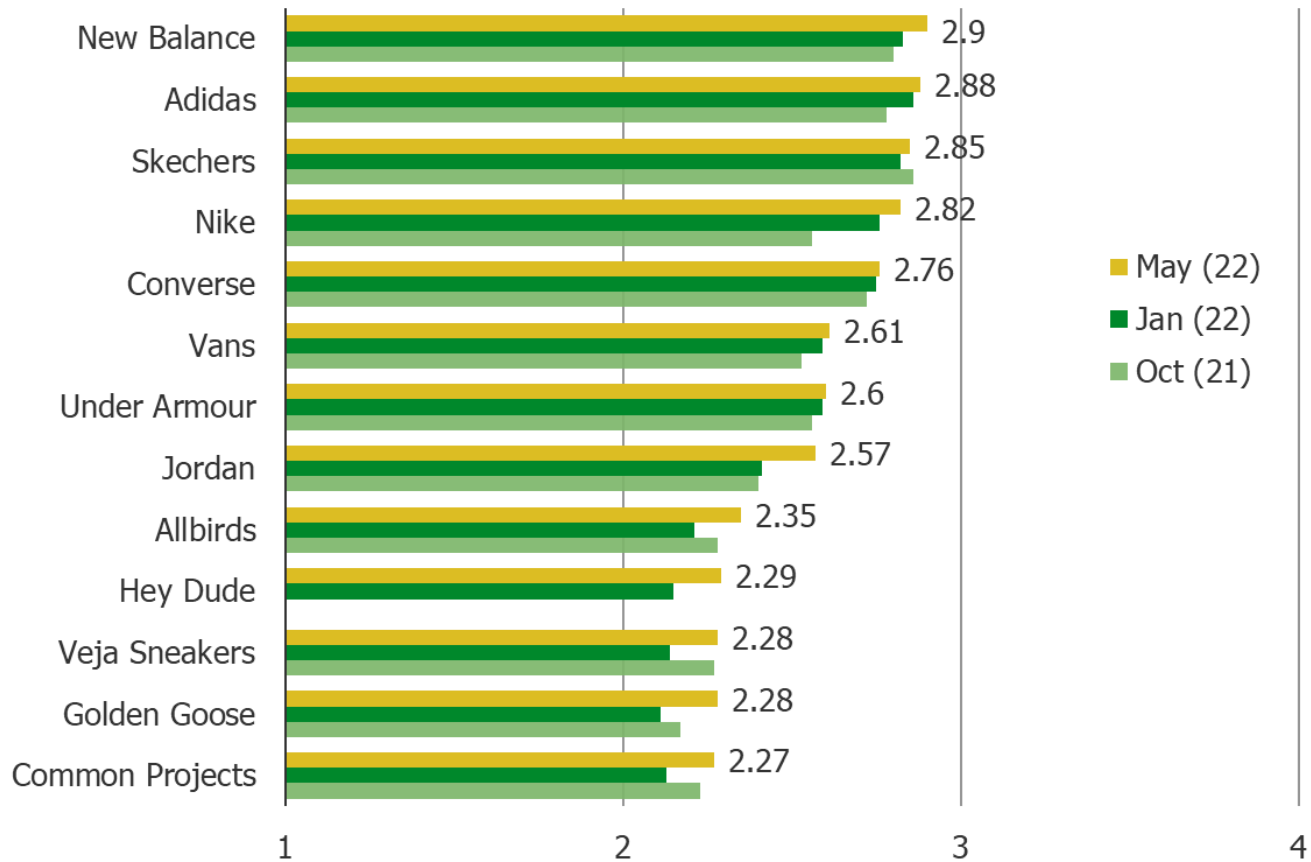
4 = Likely

5 = Very Likely

	N =
Adidas	353
Skechers	410
Nike	581
Jordan	187
Under Armour	190
Converse	250
Vans	215
New Balance	326
Common Projects	57
Golden Goose	42
Veja Sneakers	64
Allbirds	61
Hey Dude	60

HOW LIKELY ARE YOU TO BUY SNEAKERS FROM THE FOLLOWING BRANDS IN THE FUTURE?

Posed to respondents who DO NOT own footwear from each of the following.



Weighted Average Guide:

5 point scale

1 = Very Unlikely

2 = Unlikely

3 = Somewhat Likely

4 = Likely

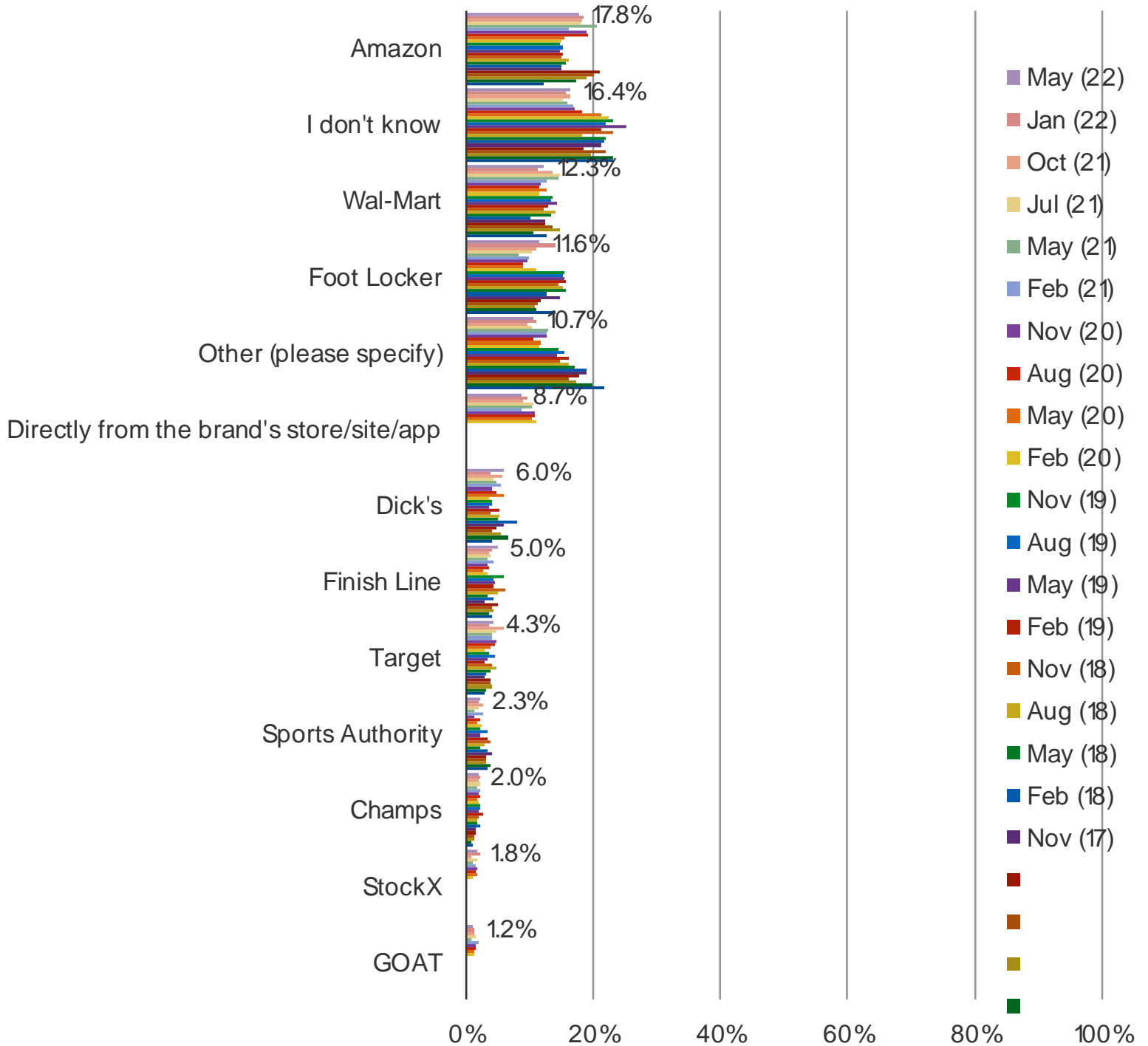
5 = Very Likely

	N =
Adidas	907
Skechers	850
Nike	679
Jordan	1073
Under Armour	1070
Converse	1010
Vans	1045
New Balance	934
Common Projects	1203
Golden Goose	1218
Veja Sneakers	1196
Allbirds	1199
Hey Dude	1200

FOOTWEAR RETAILERS

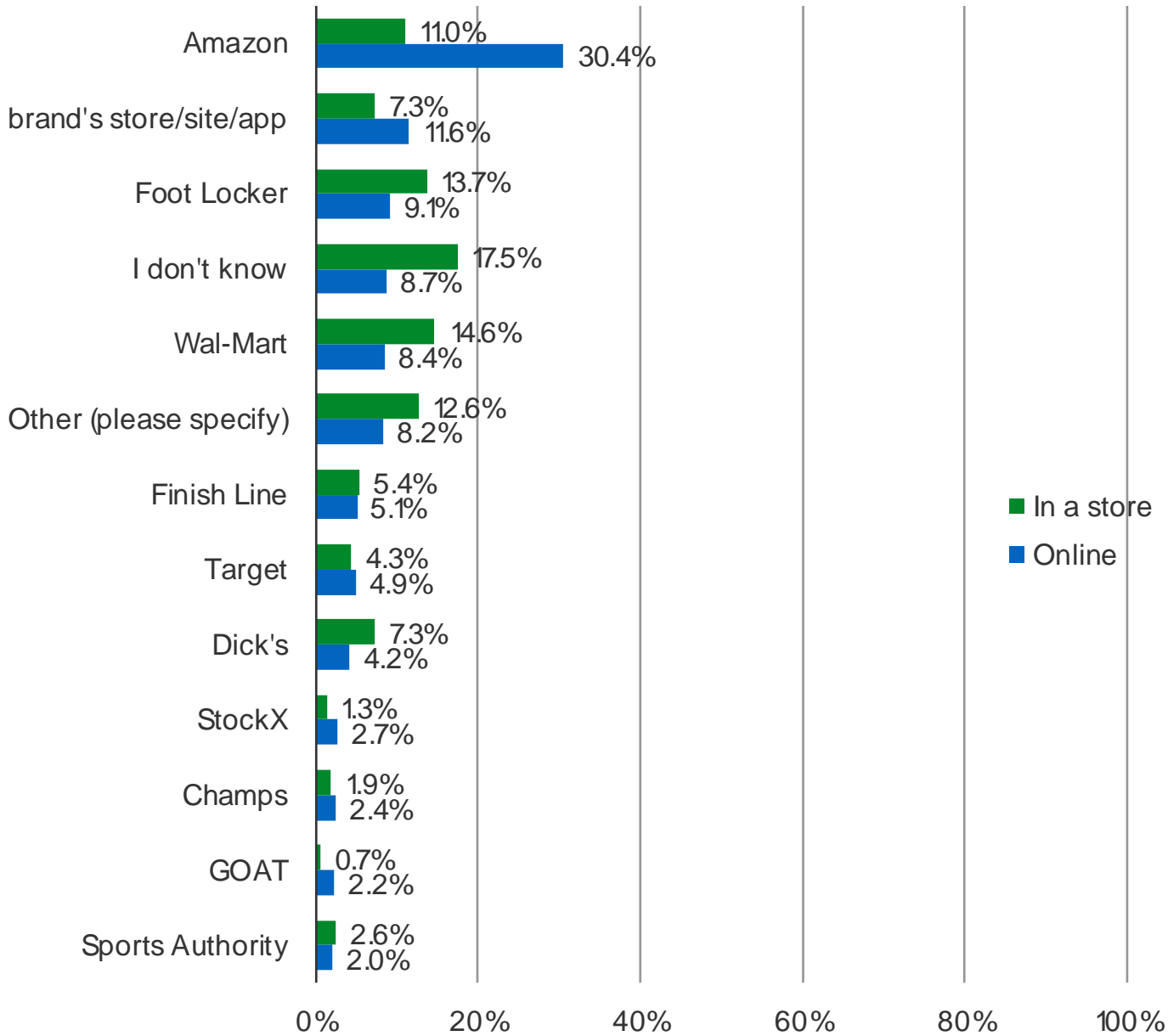
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

Posed to all respondents



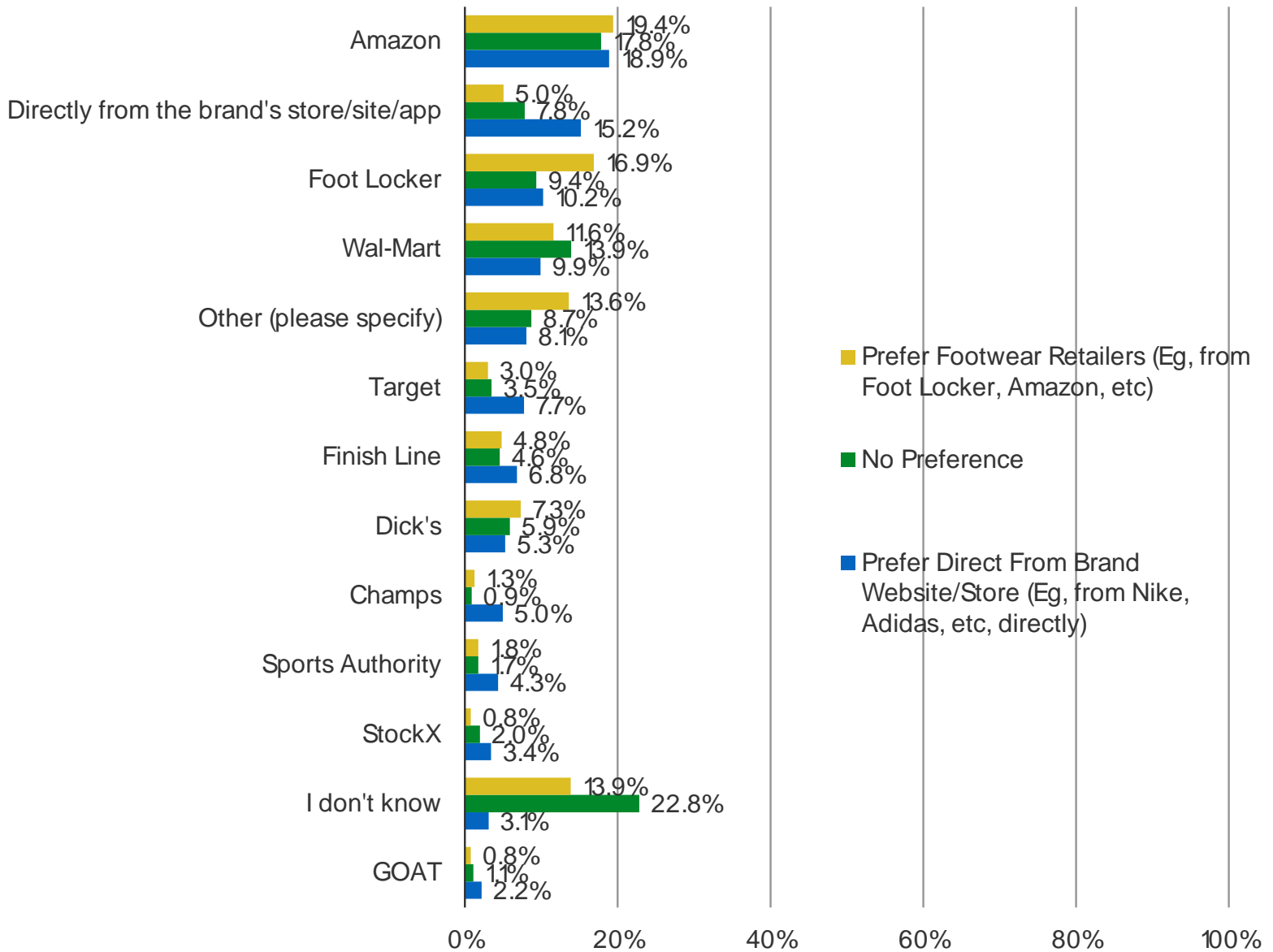
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



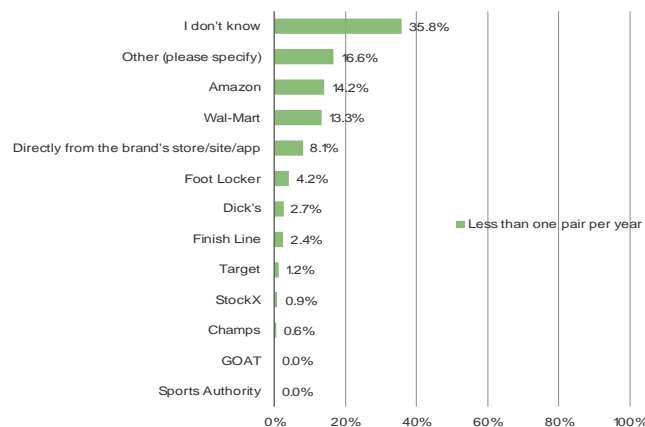
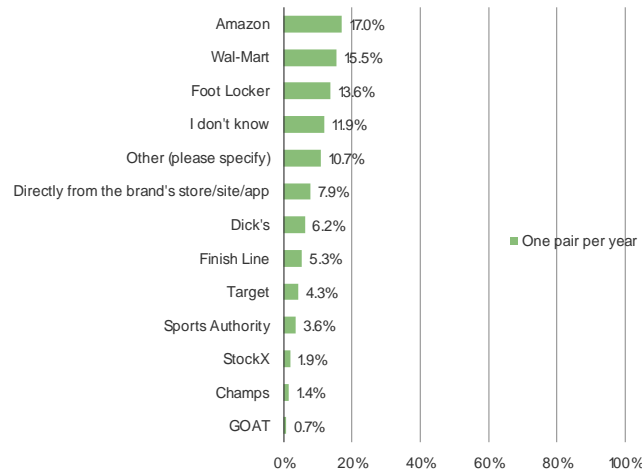
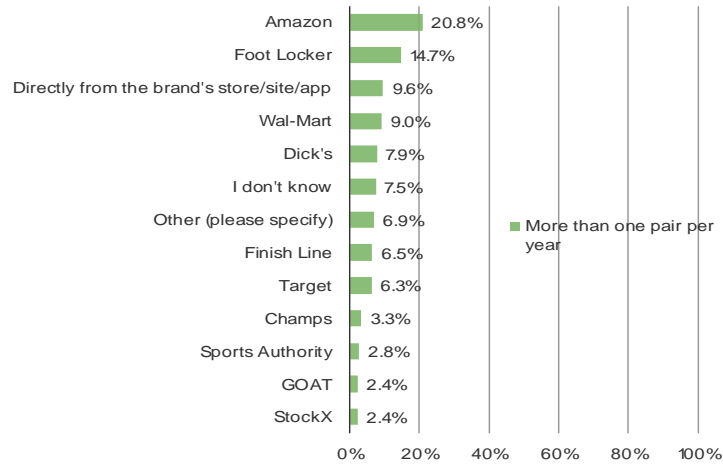
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



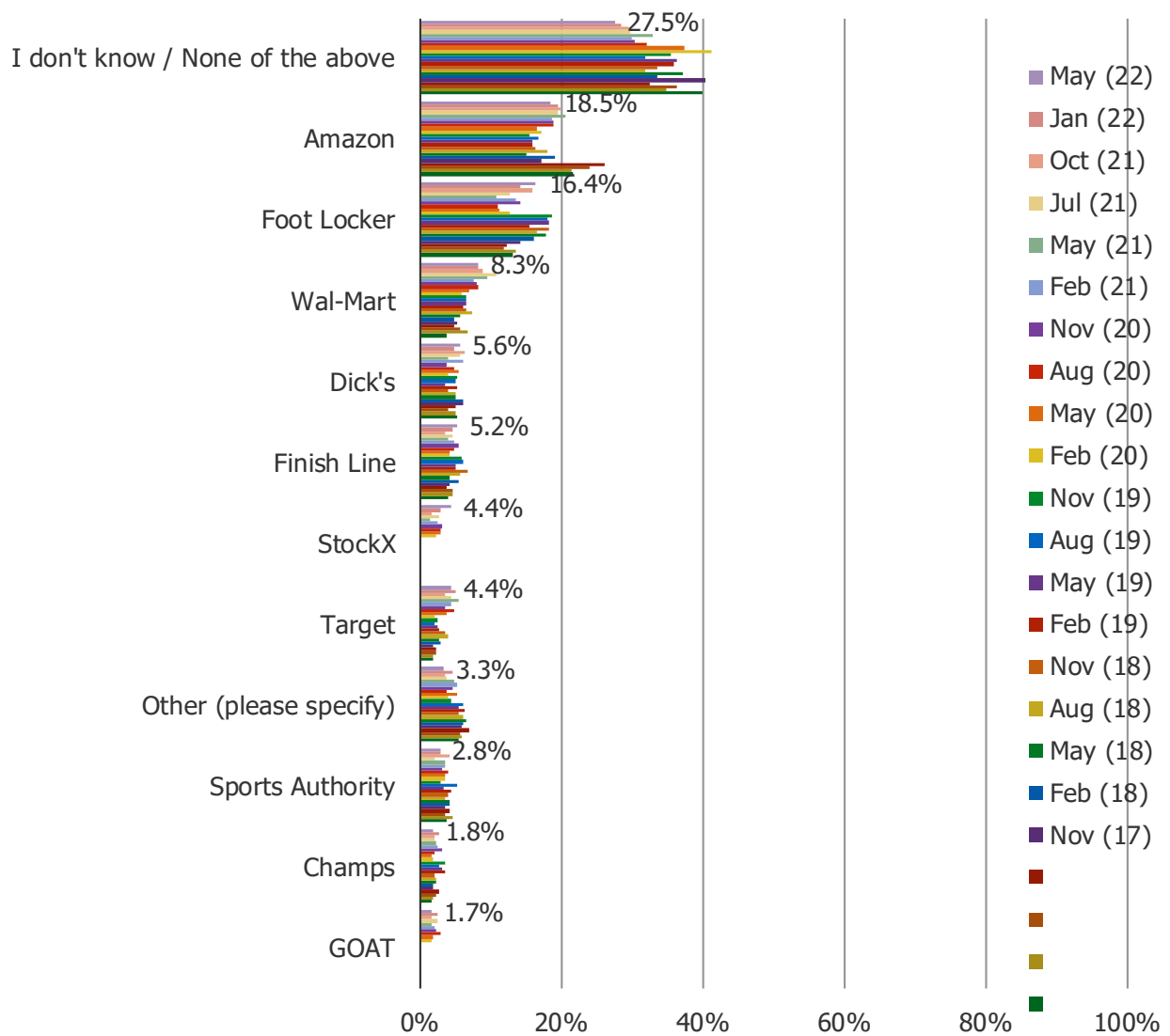
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



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

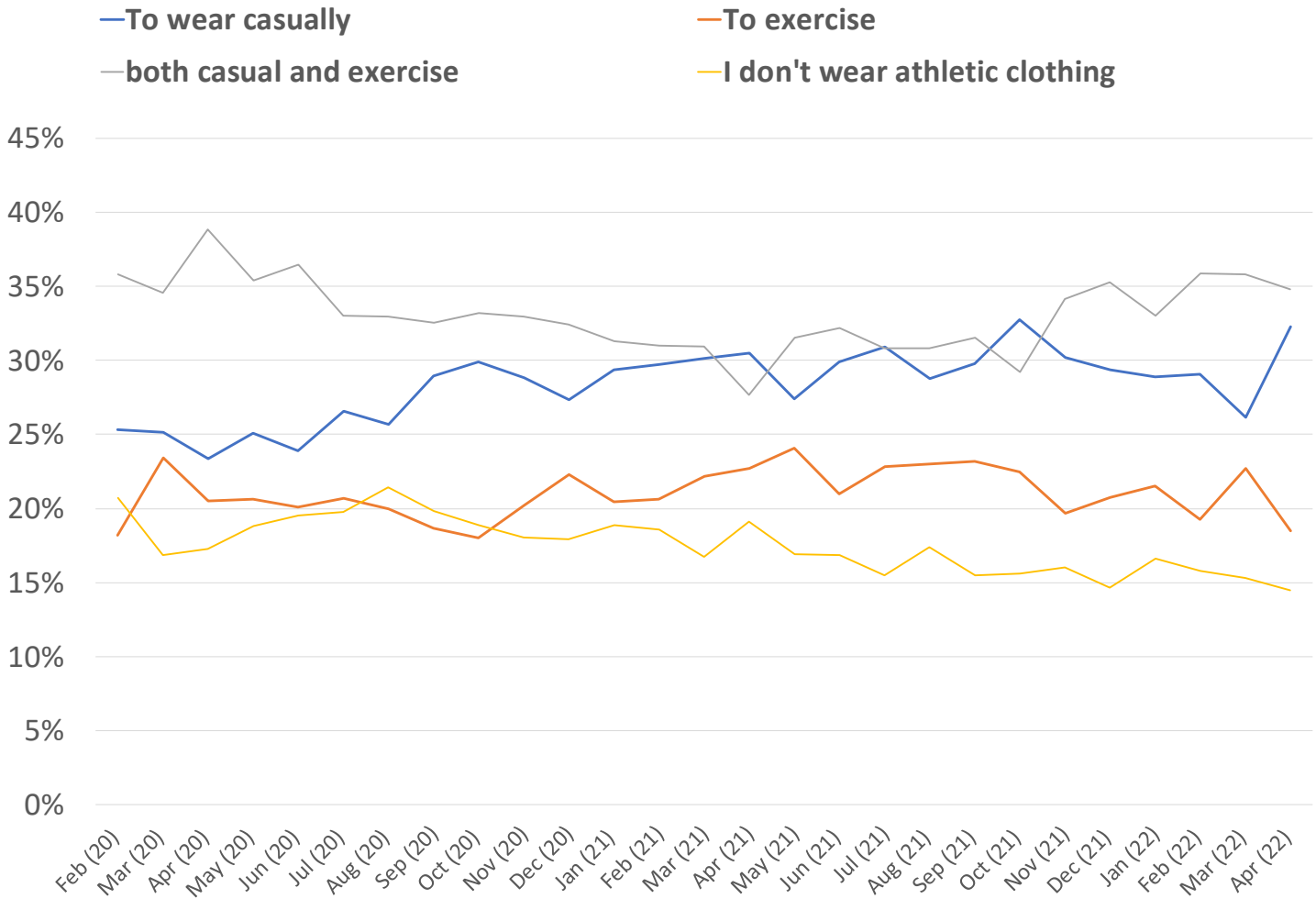
Posed to all respondents



CASUAL WEAR

WHAT DO YOU USE ATHLETIC CLOTHING FOR?

Posed to all respondents



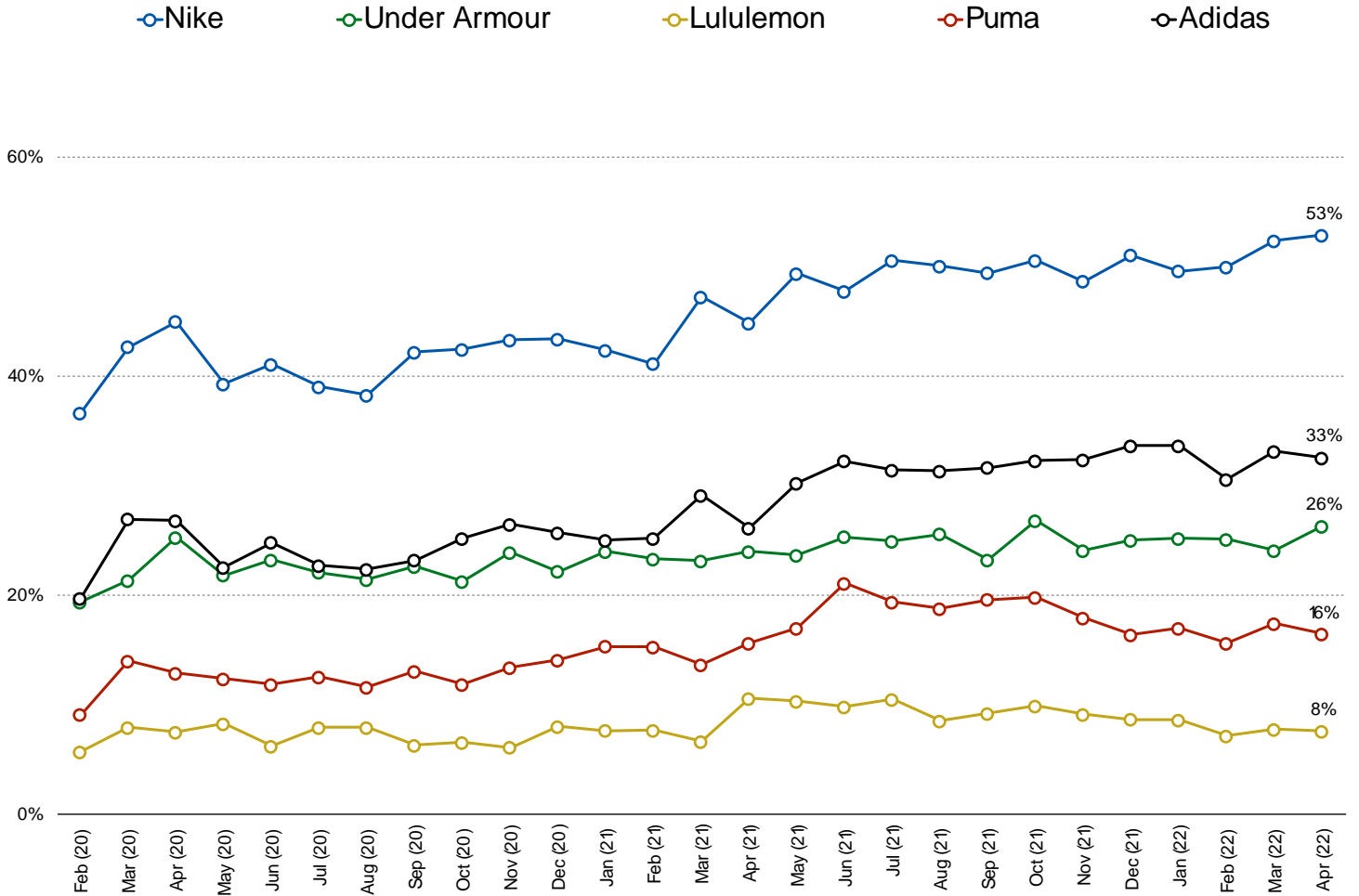
Looking into Their Soles

Audience: 1,250 US Consumers

Date: May 2022

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

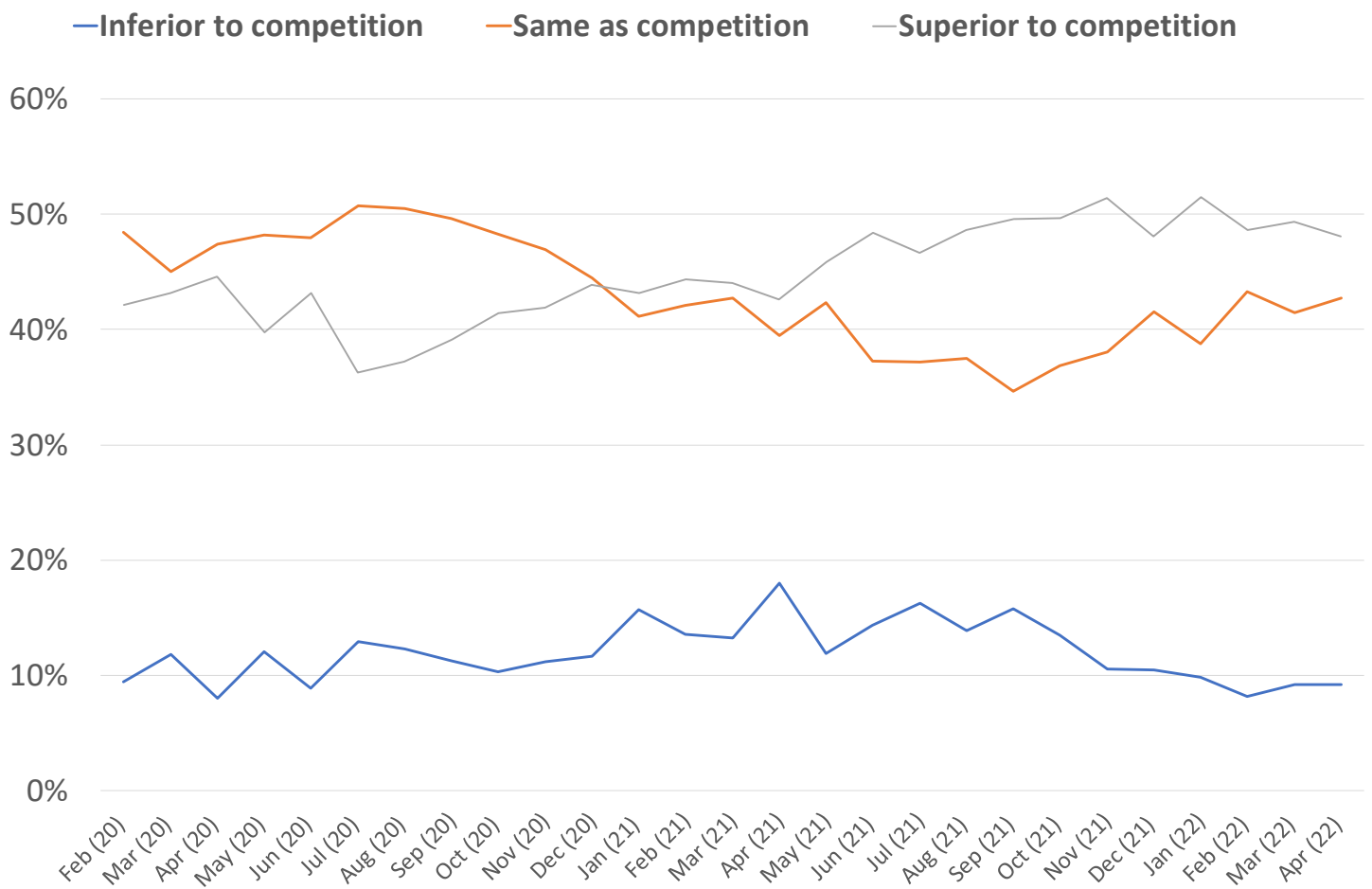
Posed to all respondents



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

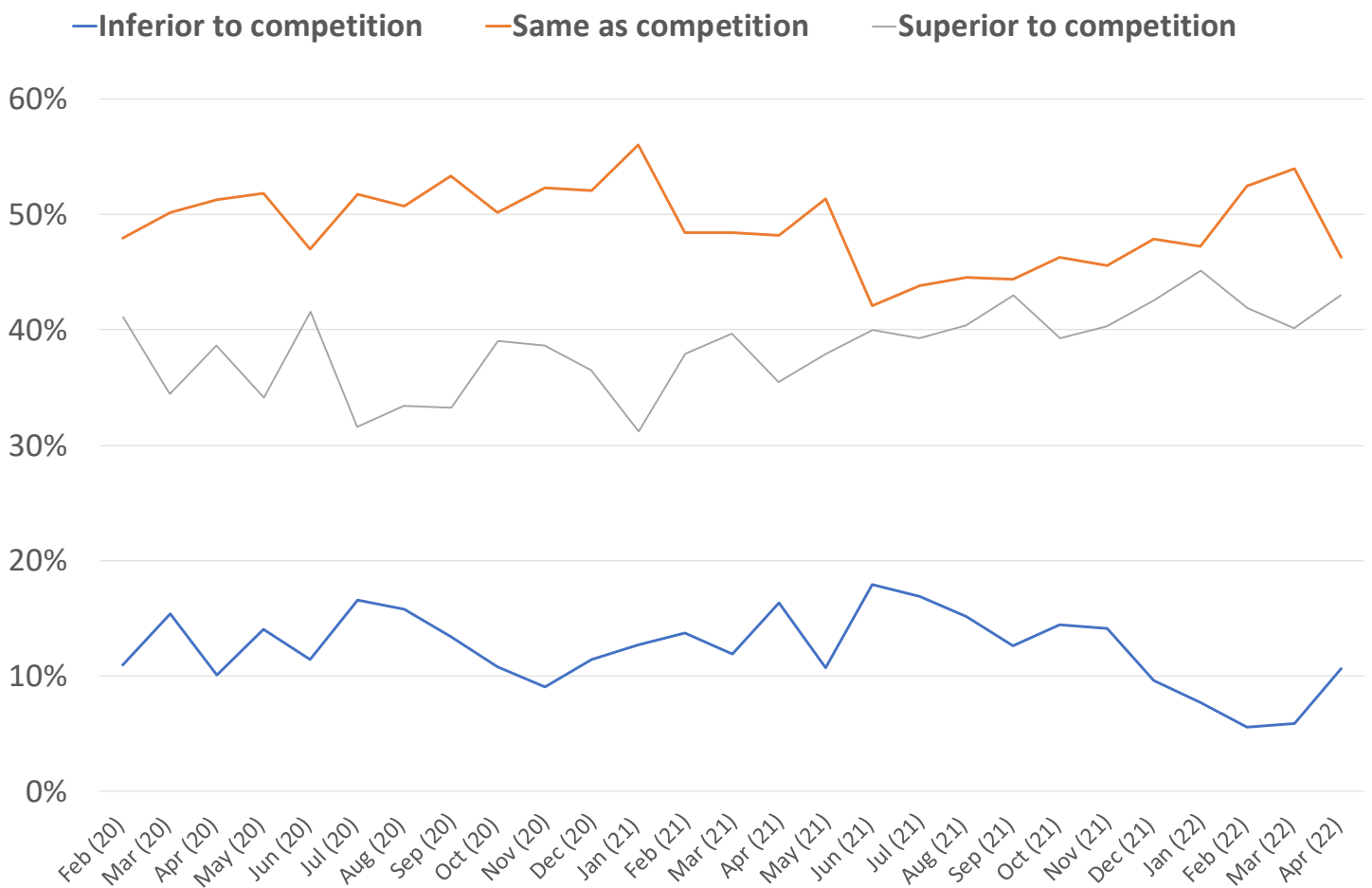
NIKE



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

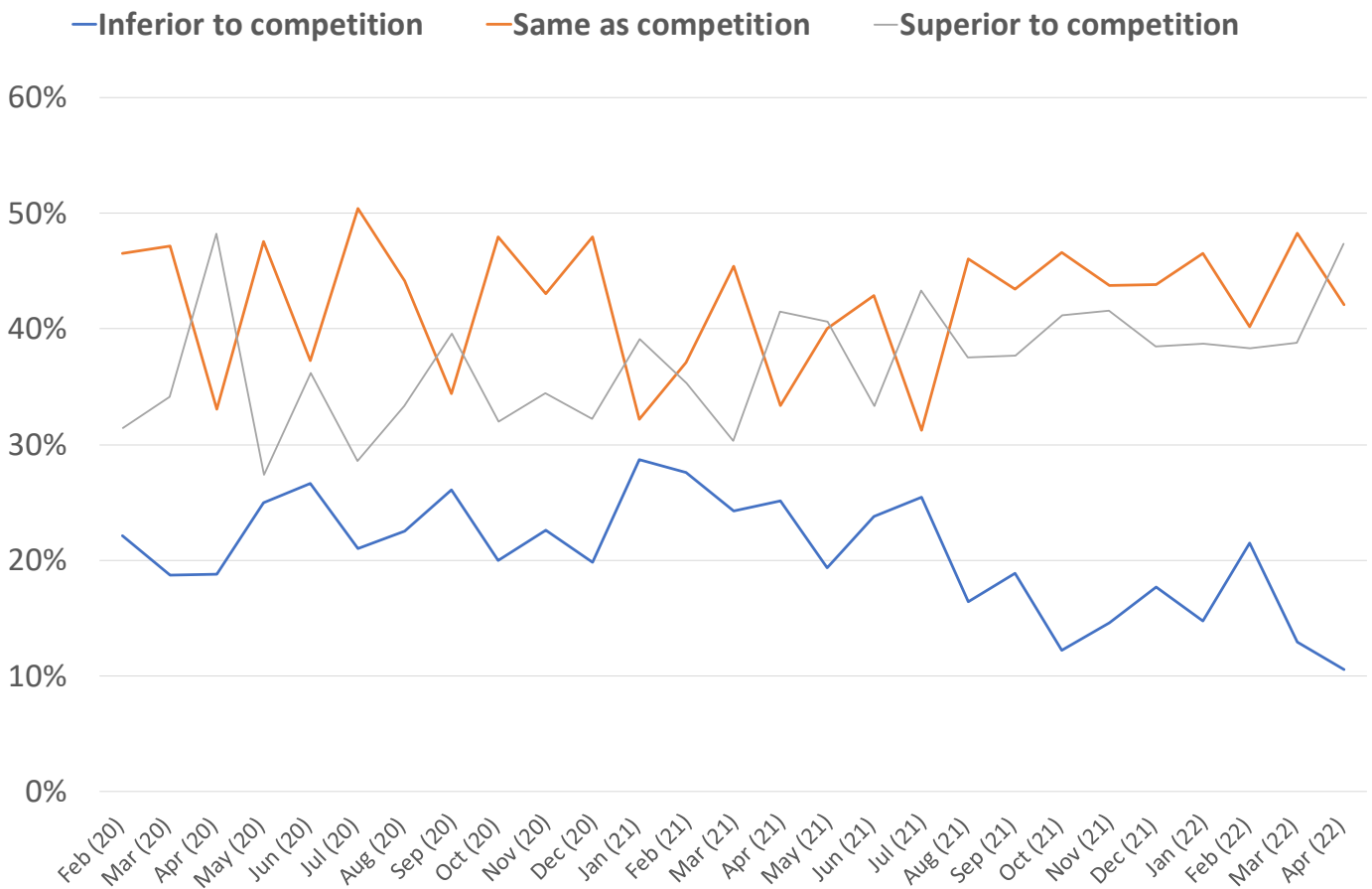
UNDER ARMOUR



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

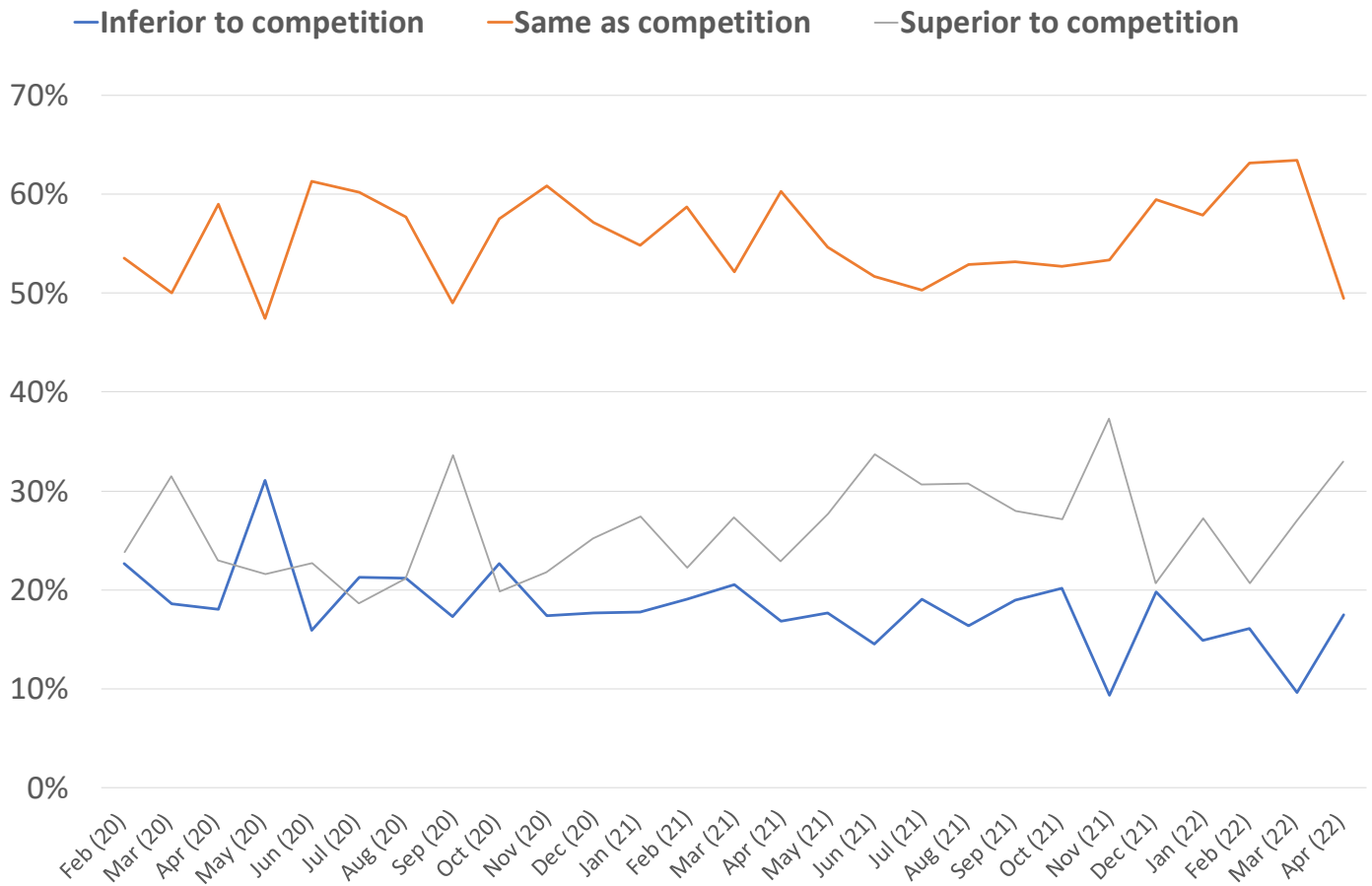
LULULEMON



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

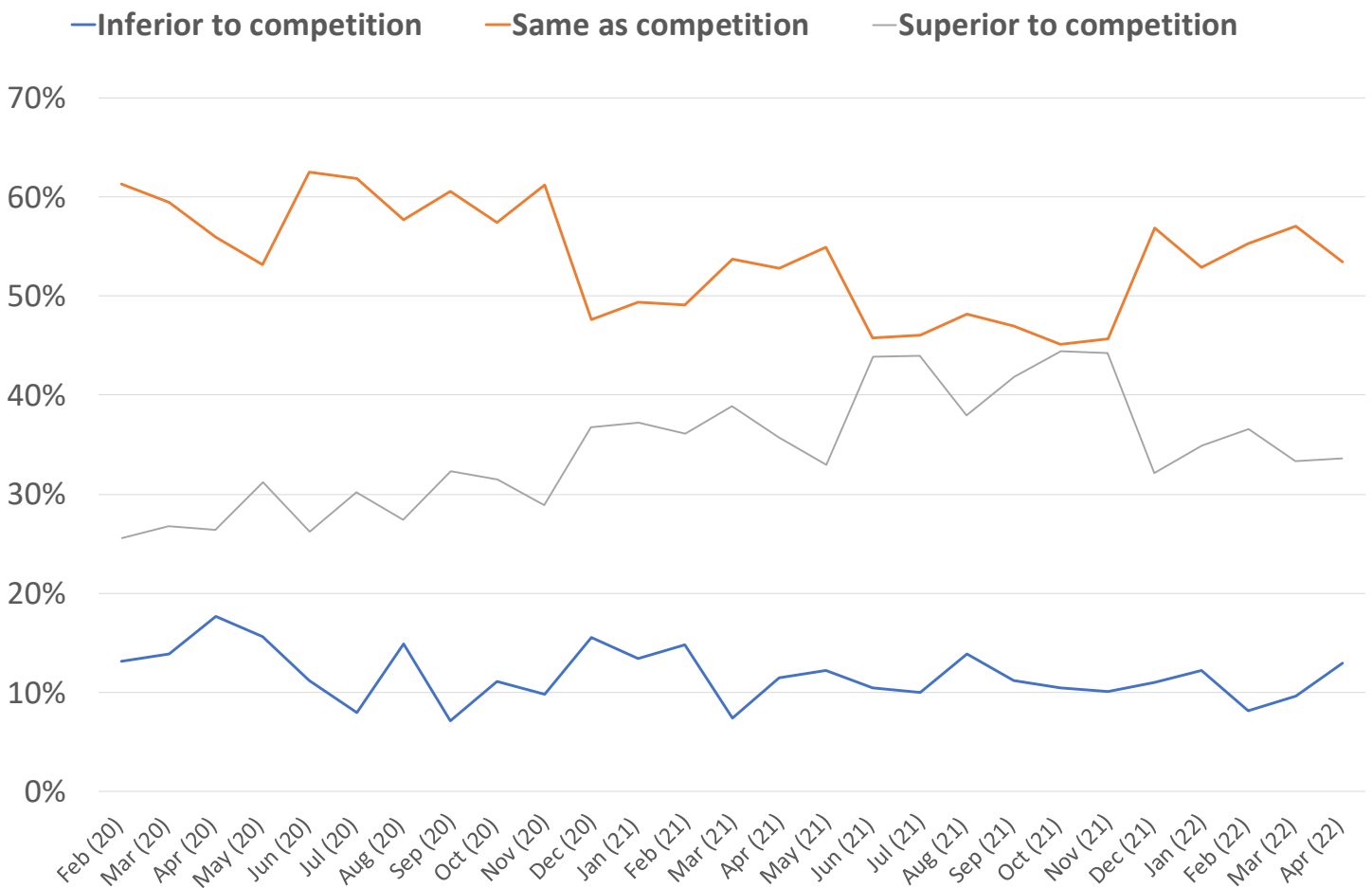
FILA



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

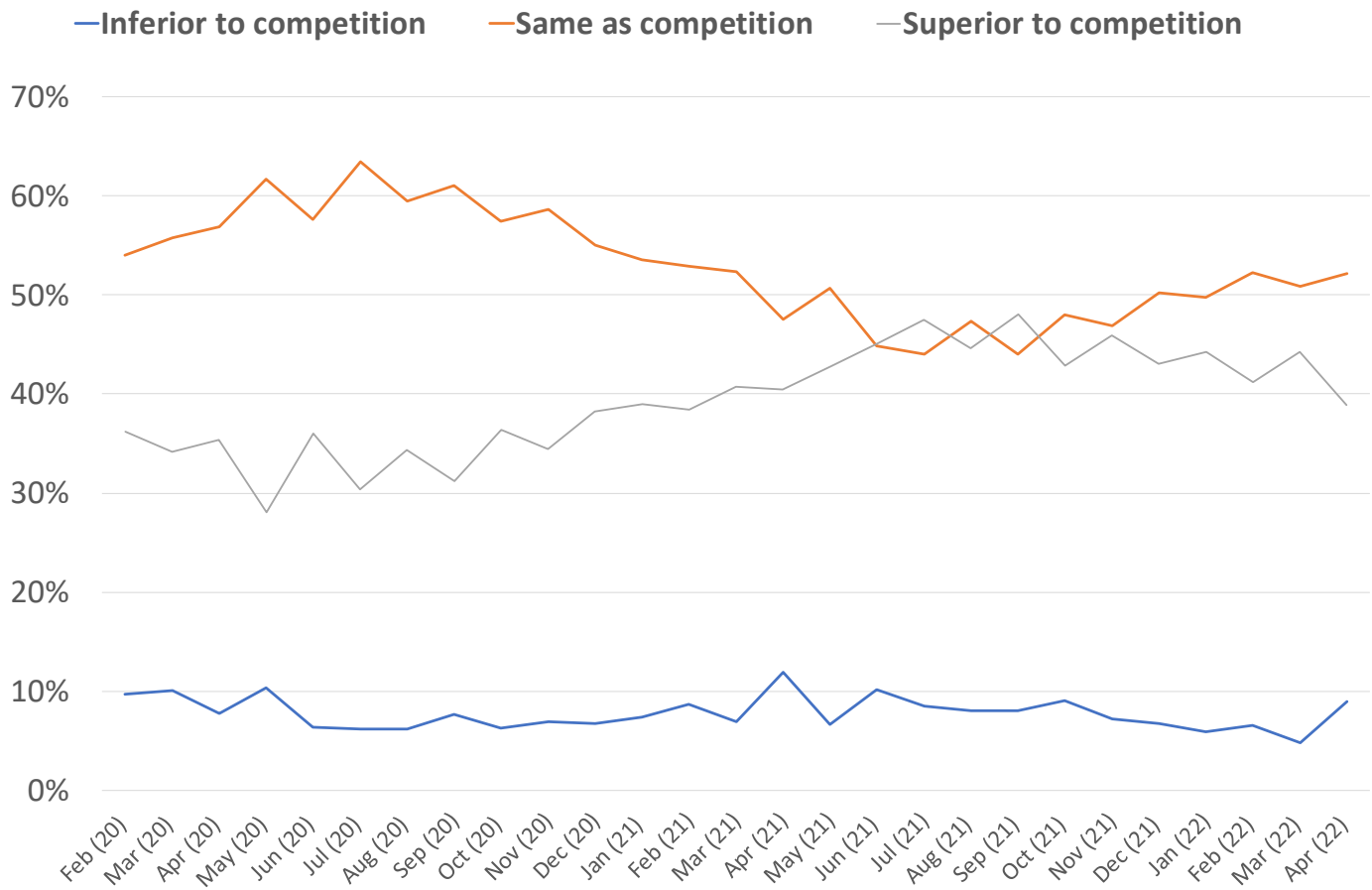
PUMA



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

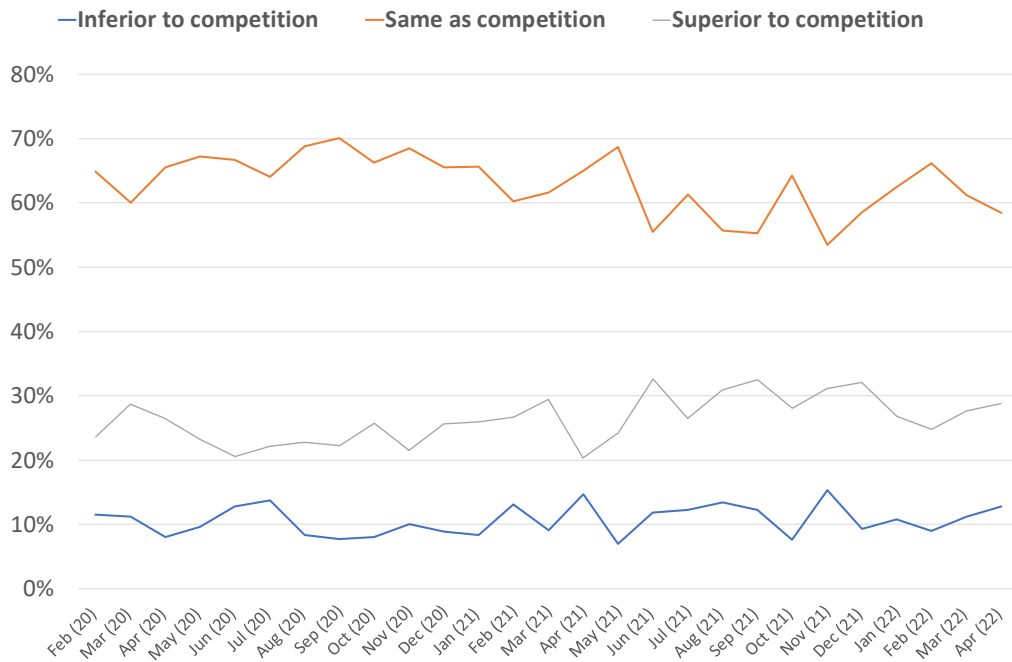
ADIDAS



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

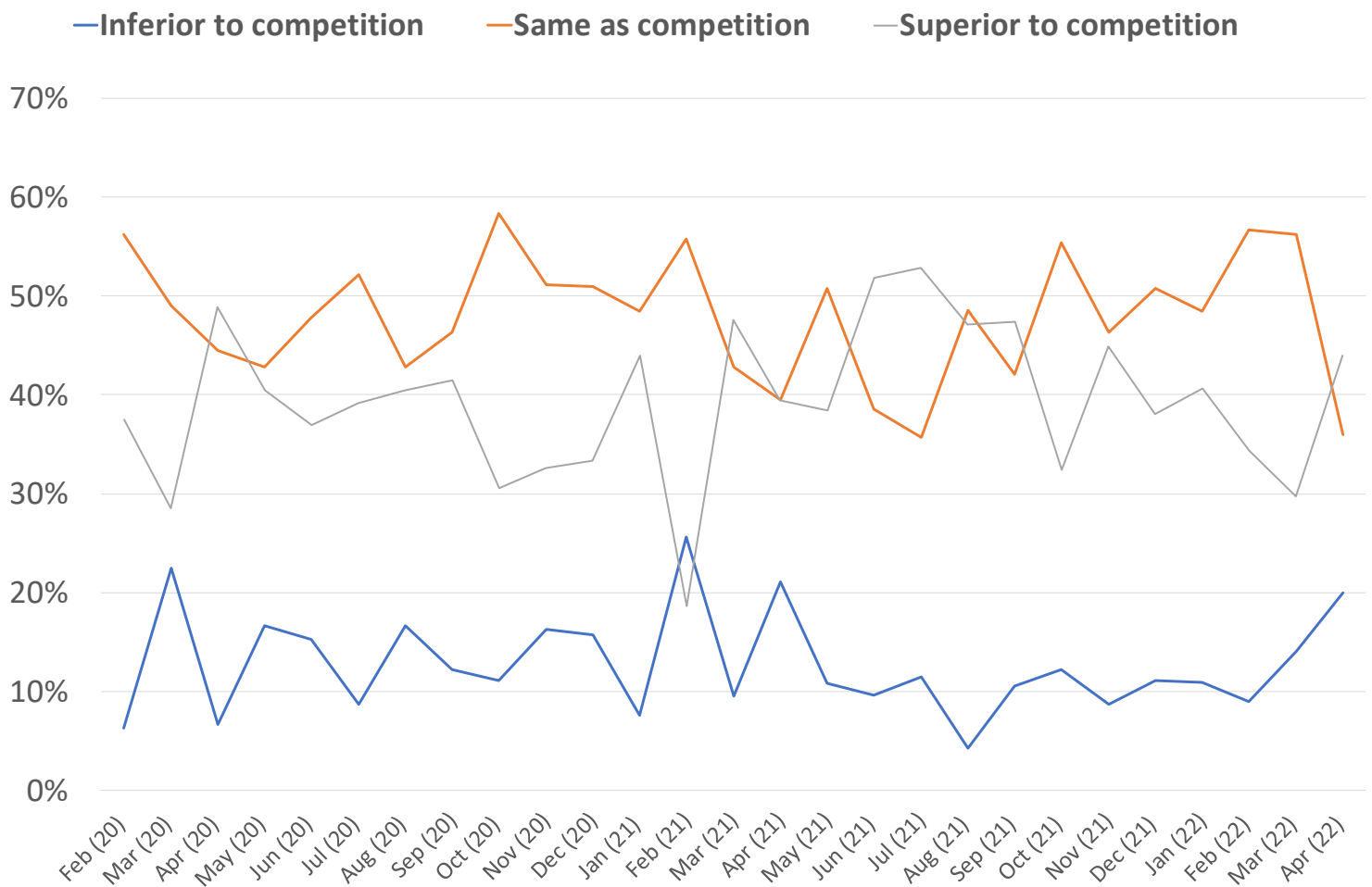
CHAMPION



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

ATHLETA



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

