

Bespoke Survey Research

August 2023

Footwear and Athletic Wear

Volume 29 | Quarterly Survey

1,250 US Consumers Balanced To Census

Tickers Covered: FL, NKE, ADDYY, SKX, UA, AMZN, LULU, GPS.

KPIs and Key questions

1. Consumer preferences had been slowly shifting toward online over the history of our survey, but over the past two waves preferences shifted back in the direction of in-store a bit.
2. Consumers who prefer to buy online continue to buy footwear more frequently than respondents who prefer to buy in-stores.
3. Consumer preferences had been slowly shifting toward buying footwear direct from the brand as opposed to getting it from a retailer, but over the past two waves preferences data shifted back toward getting it from the retailer a bit.
4. Younger respondents and more frequent footwear purchasers are more likely to prefer to buy direct.
5. Self-reported footwear purchase recency and frequency softened a touch in recent quarters.
6. Nike and Adidas have the strongest consumer opinions (among those who are aware), but many of the other brands are also viewed favorably. Where Nike and the Jordan brand really stick out is in consumer perceptions around pricing power.
7. Most of the feedback around footwear retailers was consistent with prior waves.
8. In recent years, consumers have shifted toward buying into athletic clothing for both exercise and casual wear (the share of consumers who do not wear athletic clothing has declined over time).
9. Nike and Lululemon stick out as brands that consumers feel are superior to competition (most peers we test are most likely to be viewed as the same as competition).
10. Overall, consumers have very positive opinions of both Nike and Adidas. That said, there is a small cohort who say their opinions have worsened of both brands (more for Nike). Cross-tab analysis shows us that these cohorts behave very differently based on whether their opinion recently worsened or improved (respondents who say their opinion worsened were much more likely to say they have been buying less). The reasons for opinions worsening range from pricing and inflation to reasons related to politics.

Noteworthy Stats:

14.9% Of respondents said they bought a new pair of sneakers in the past month.

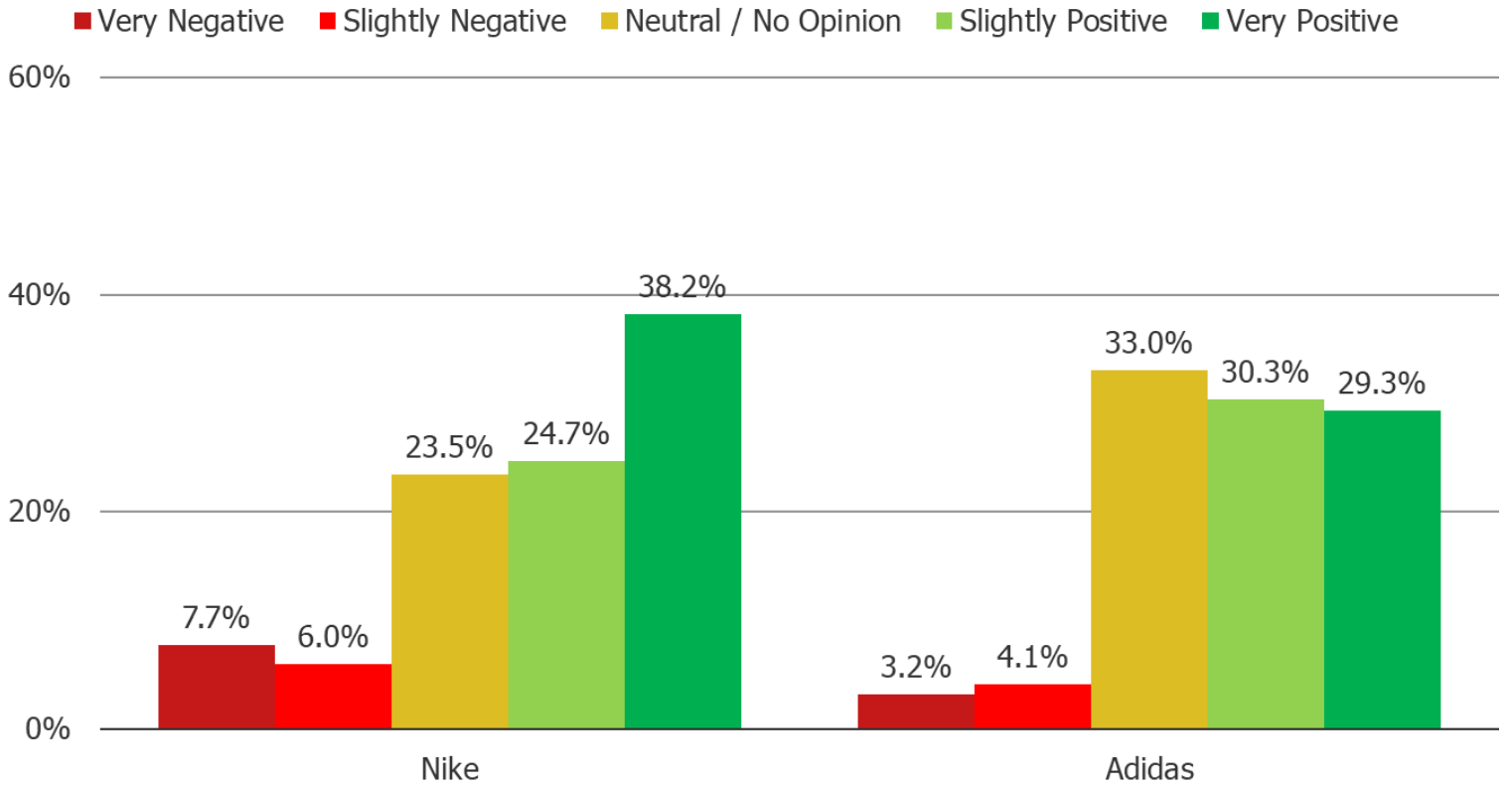
35.3% Of respondents said they buy more than one pair of sneakers per year.

36.2% Of respondents said they made their most recent footwear purchase online.

NEW QUESTIONS THIS QUARTER

WHAT ARE YOUR PERCEPTIONS OF THE FOLLOWING, OVERALL...?

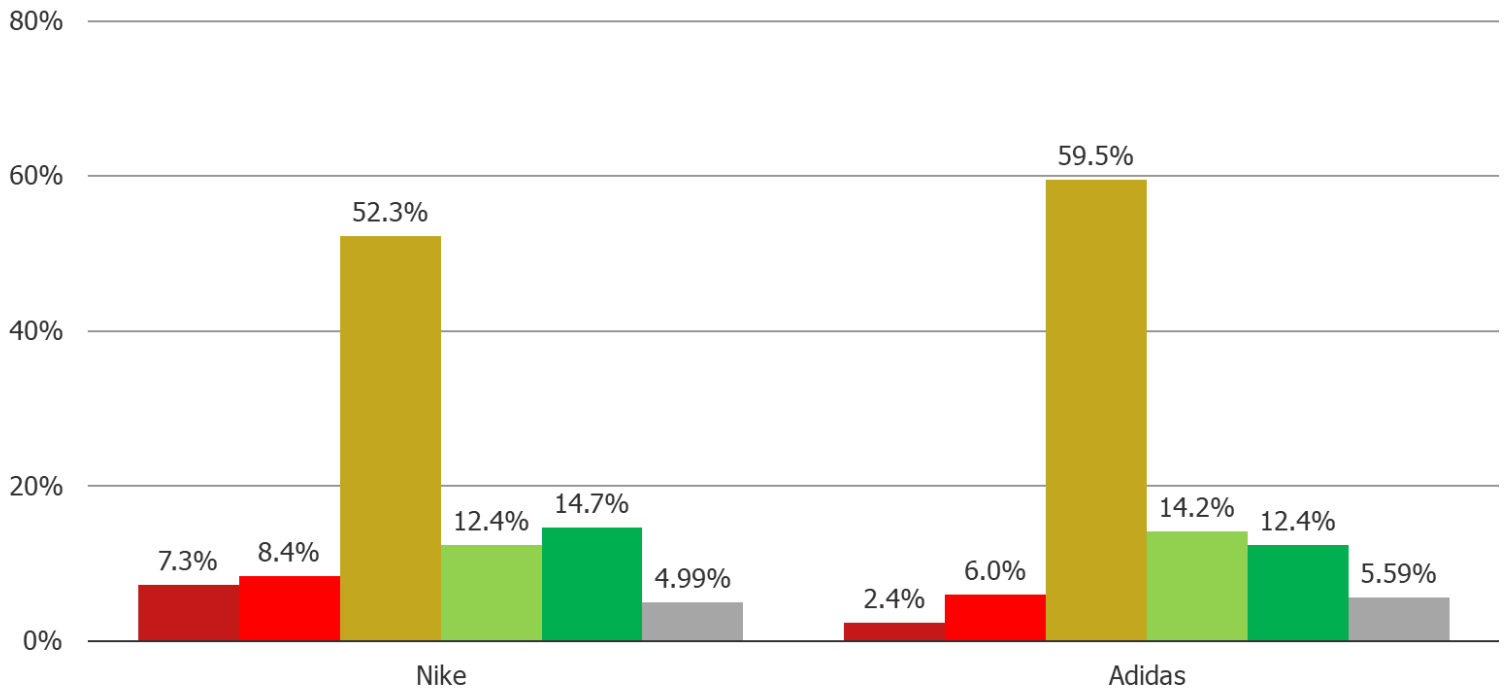
Posed to all respondents



WOULD YOU SAY THAT YOUR OPINION OF THESE BRANDS HAS CHANGED IN ANY WAY OVER TIME?

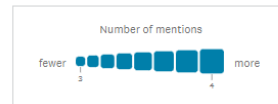
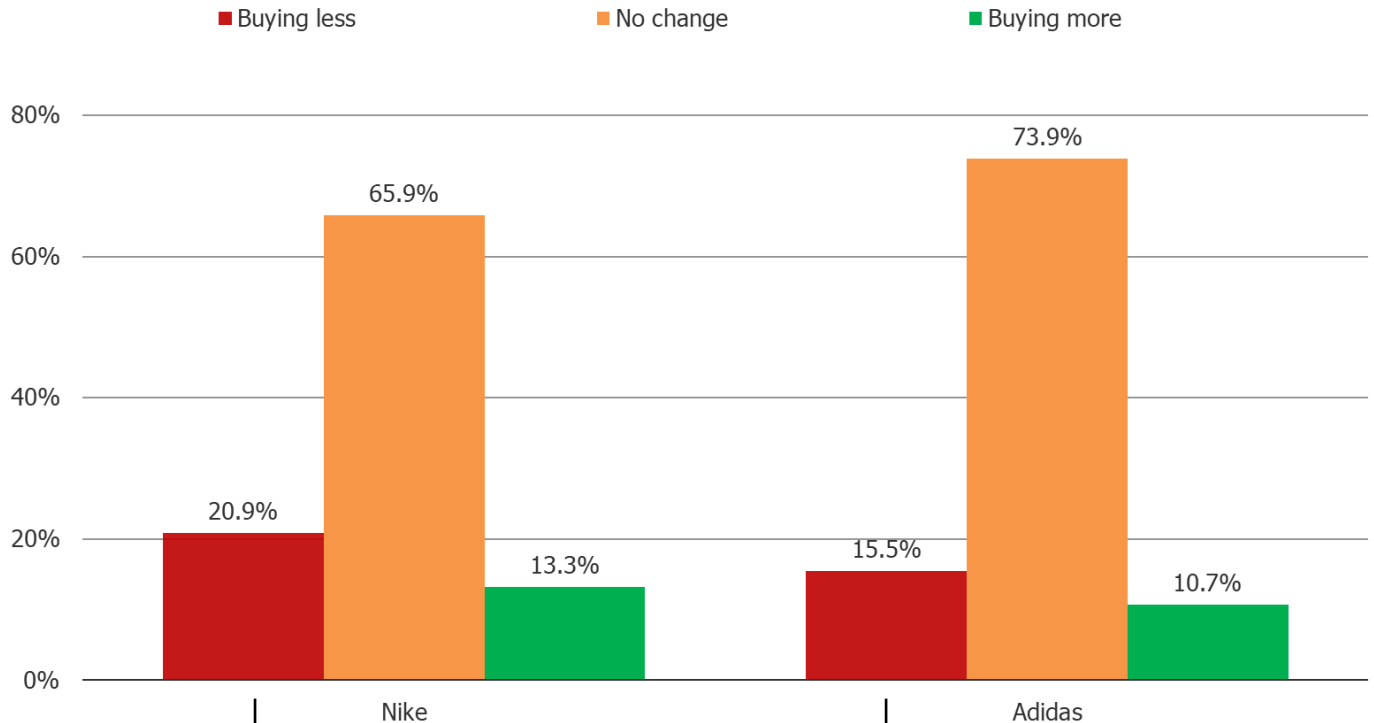
Posed to all respondents

■ Much worse over time ■ Slightly worse over time ■ No change ■ Slightly better over time ■ Much better over time? ■ N/A



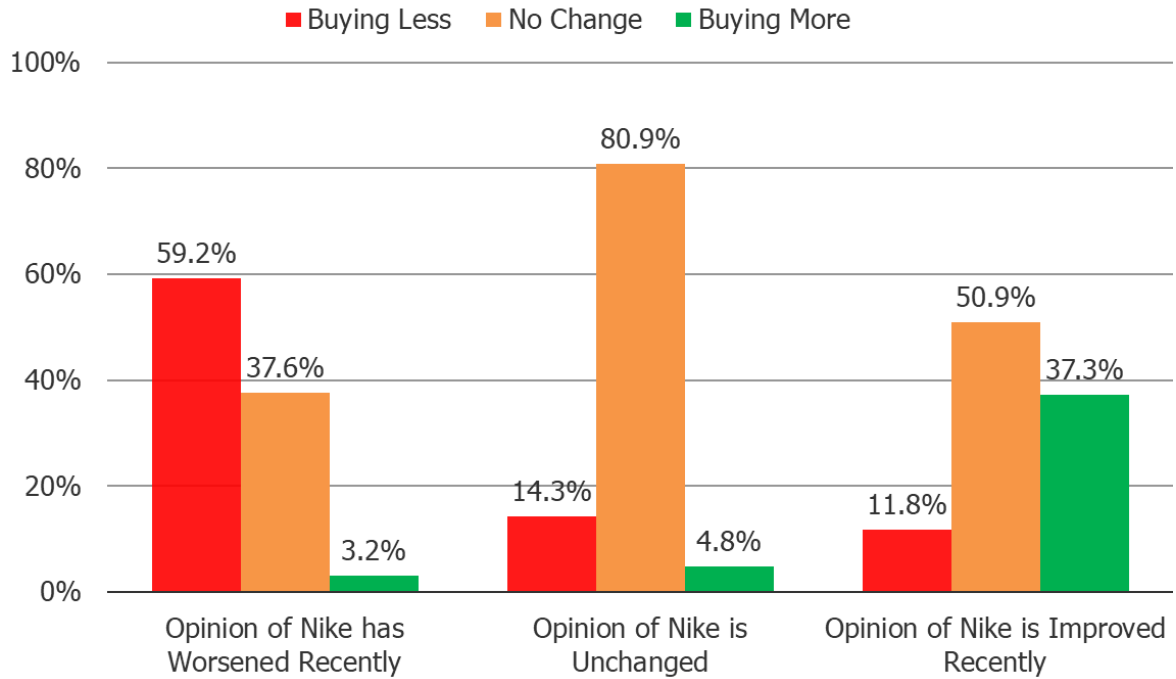
HAVE YOU BEEN CHANGING HOW OFTEN YOU BUY PRODUCTS FROM THIS BRAND OVER TIME?

Posed to all respondents

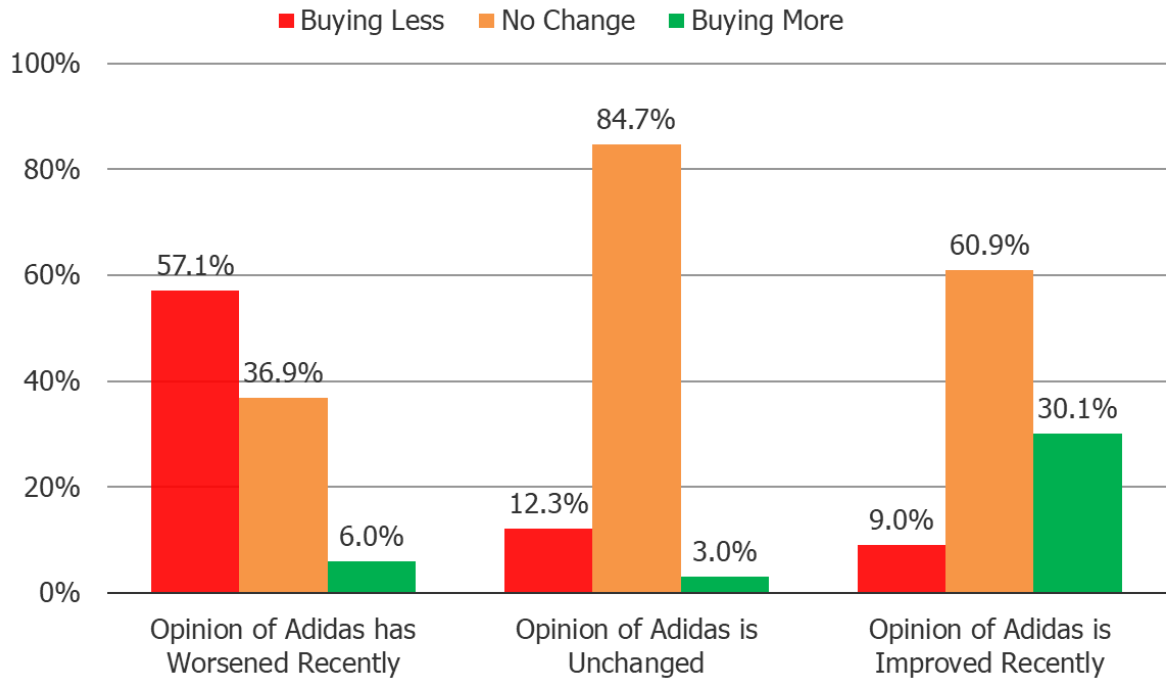


HAVE YOU BEEN CHANGING HOW OFTEN YOU BUY PRODUCTS FROM THIS BRAND OVER TIME?

Nike more or less, cross-tabbed by opinion changes of the Nike brand...



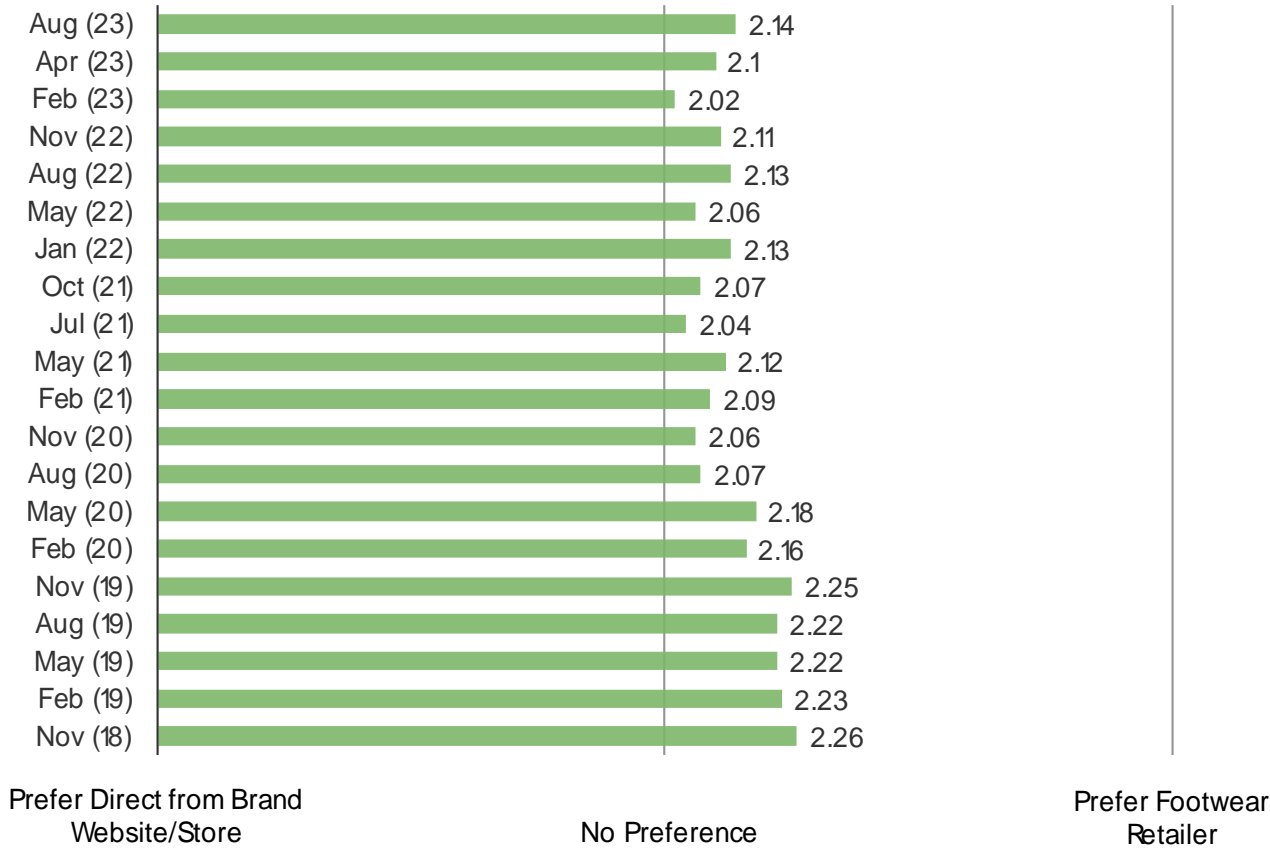
Adidas more or less, cross-tabbed by opinion changes of the Adidas brand...



FOOTWEAR PURCHASE PREFERENCES

WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

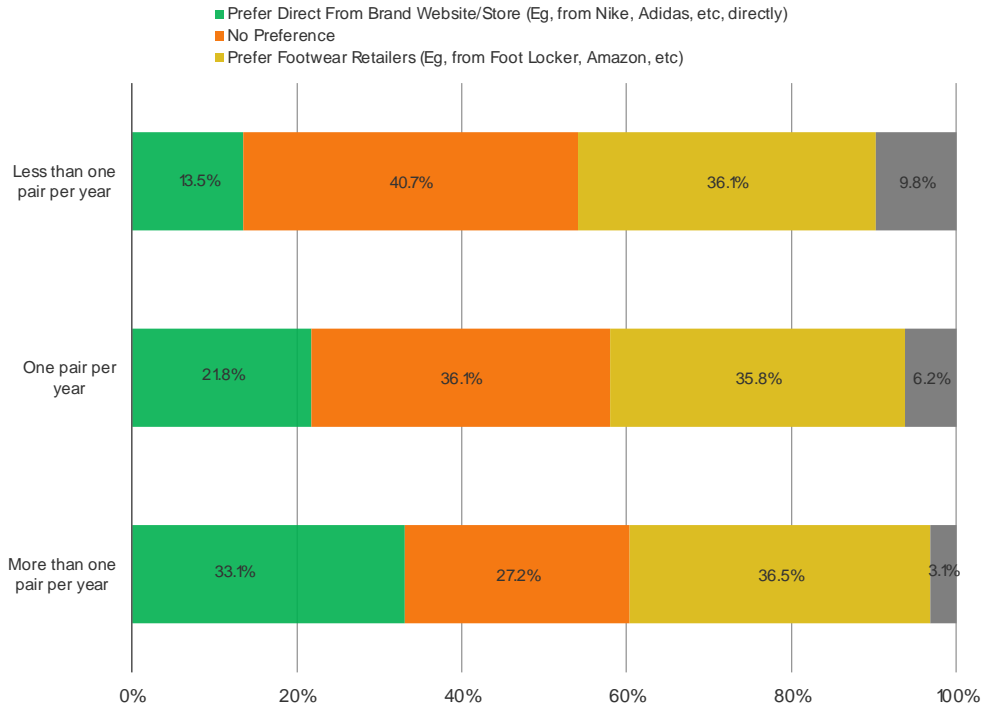
Posed to all respondents



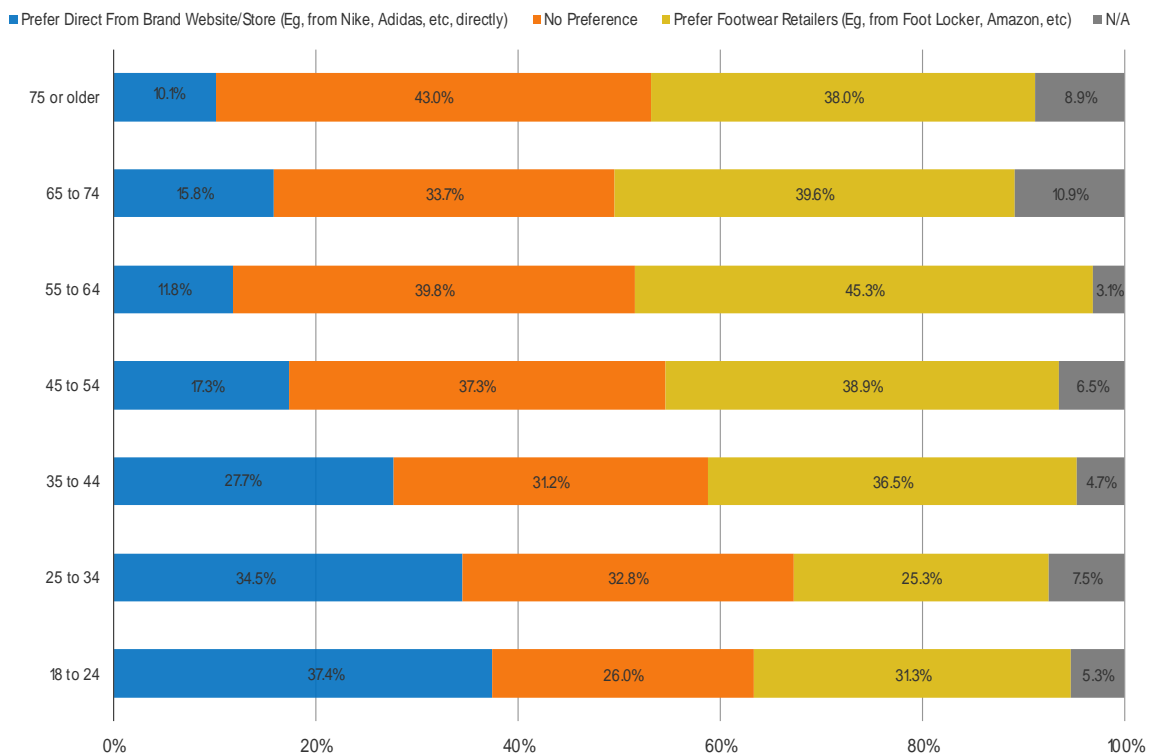
WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

Cross-Tab Analysis

By How Often Consumers Buy Footwear

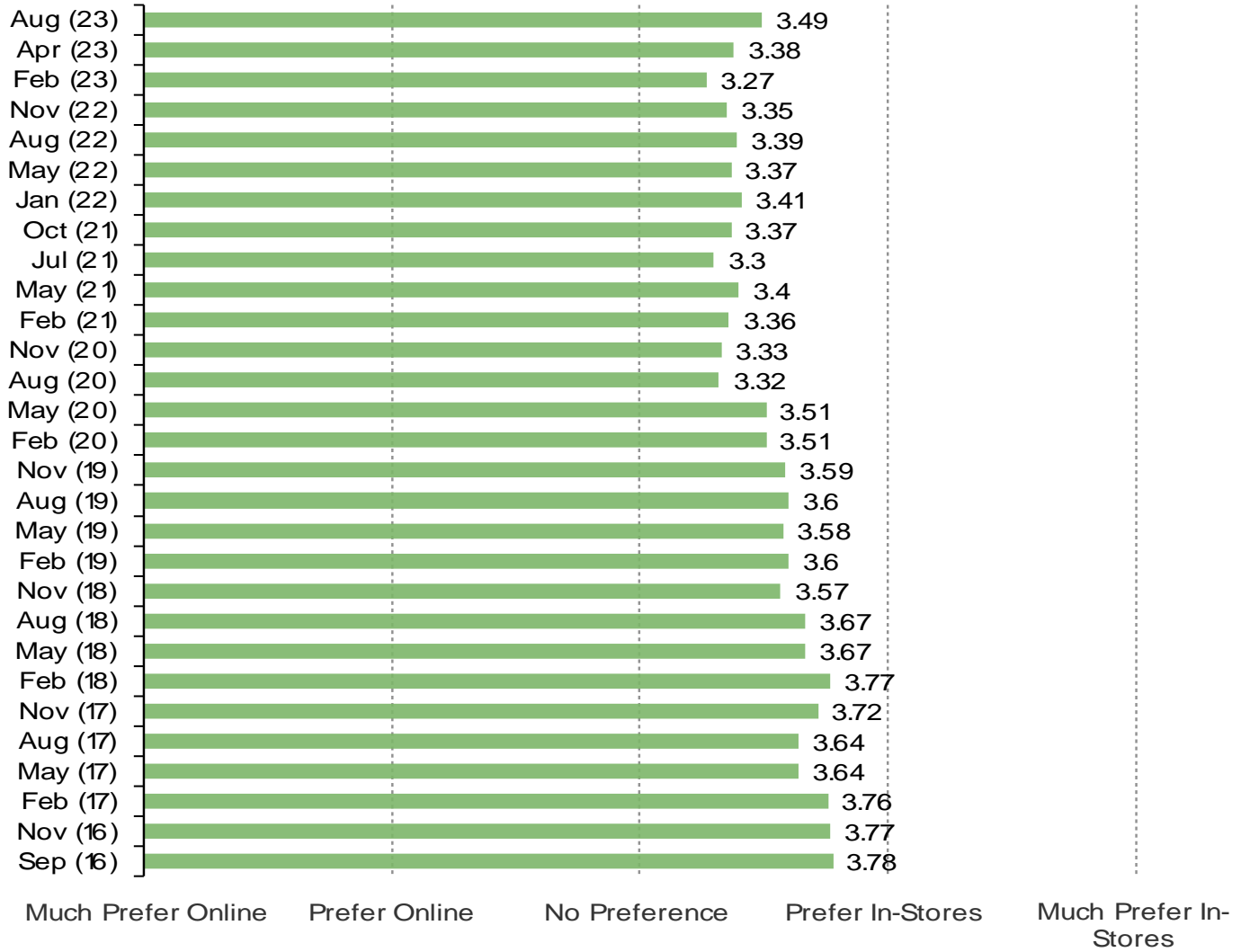


By Age



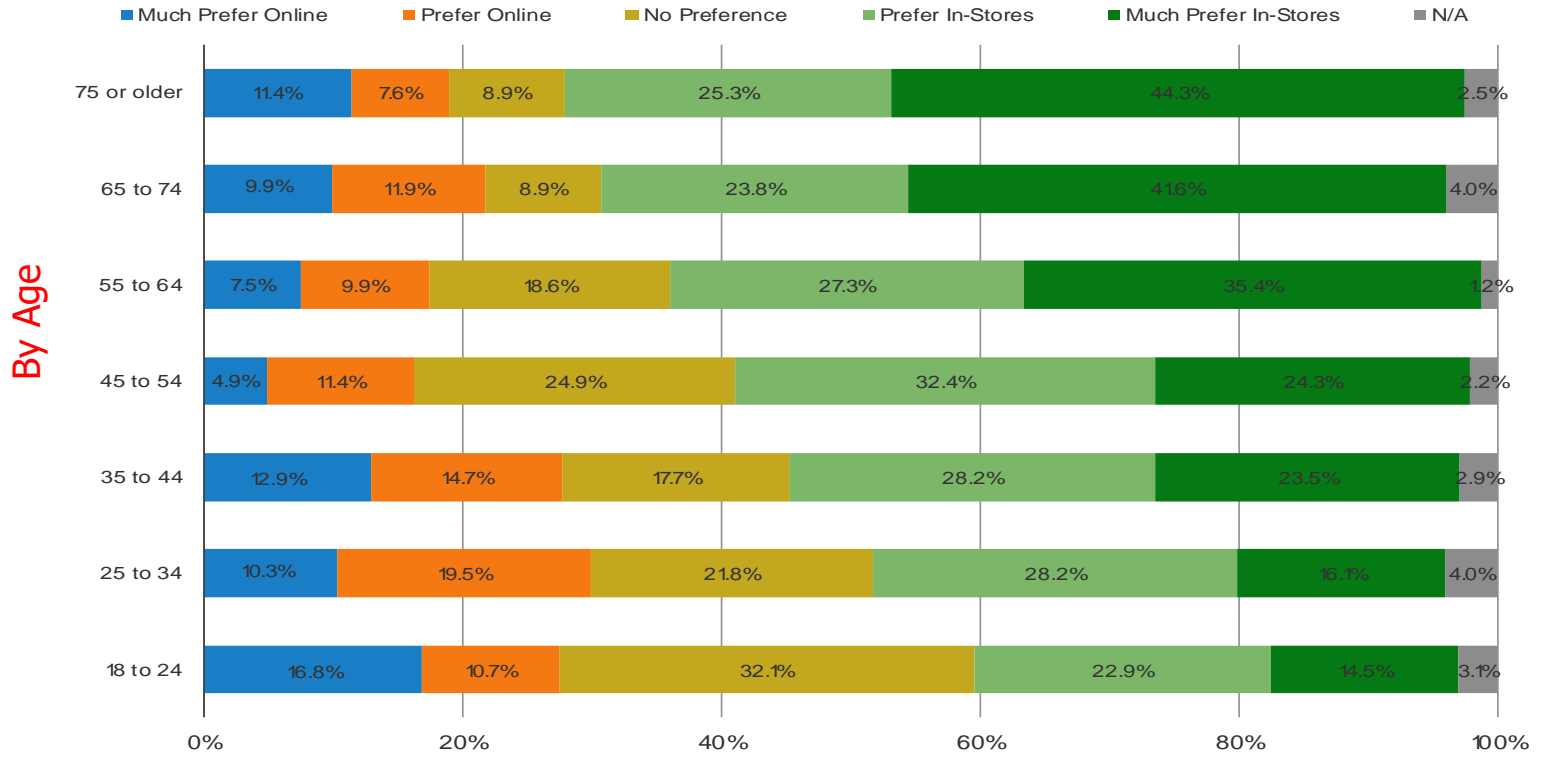
WHERE DO YOU PREFER TO BUY SNEAKERS?

Posed to all respondents



WHERE DO YOU PREFER TO BUY SNEAKERS?

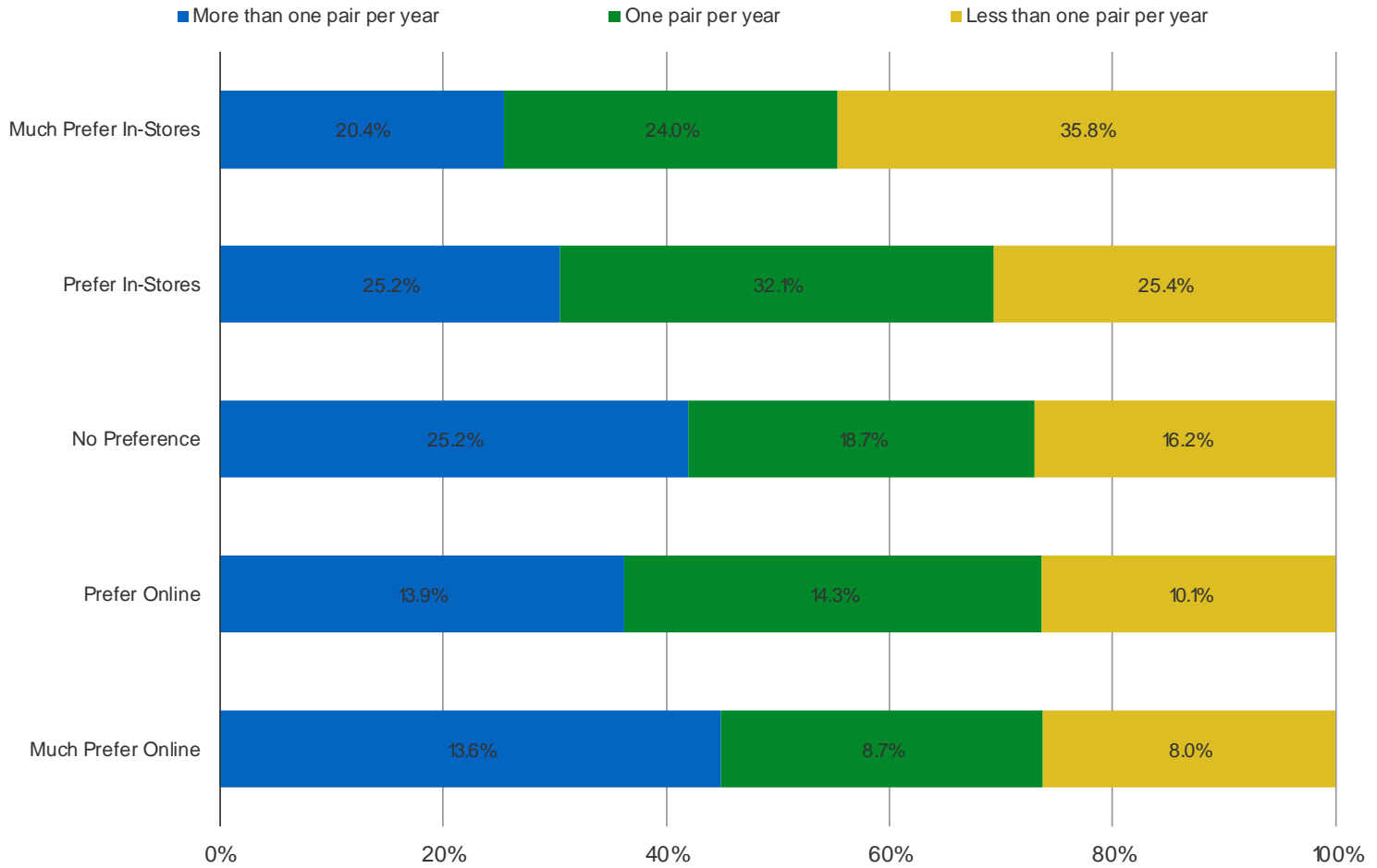
Cross-Tab Analysis



HOW MANY PAIRS OF FOOTWEAR DO YOU BUY PER YEAR?

Cross-Tab Analysis

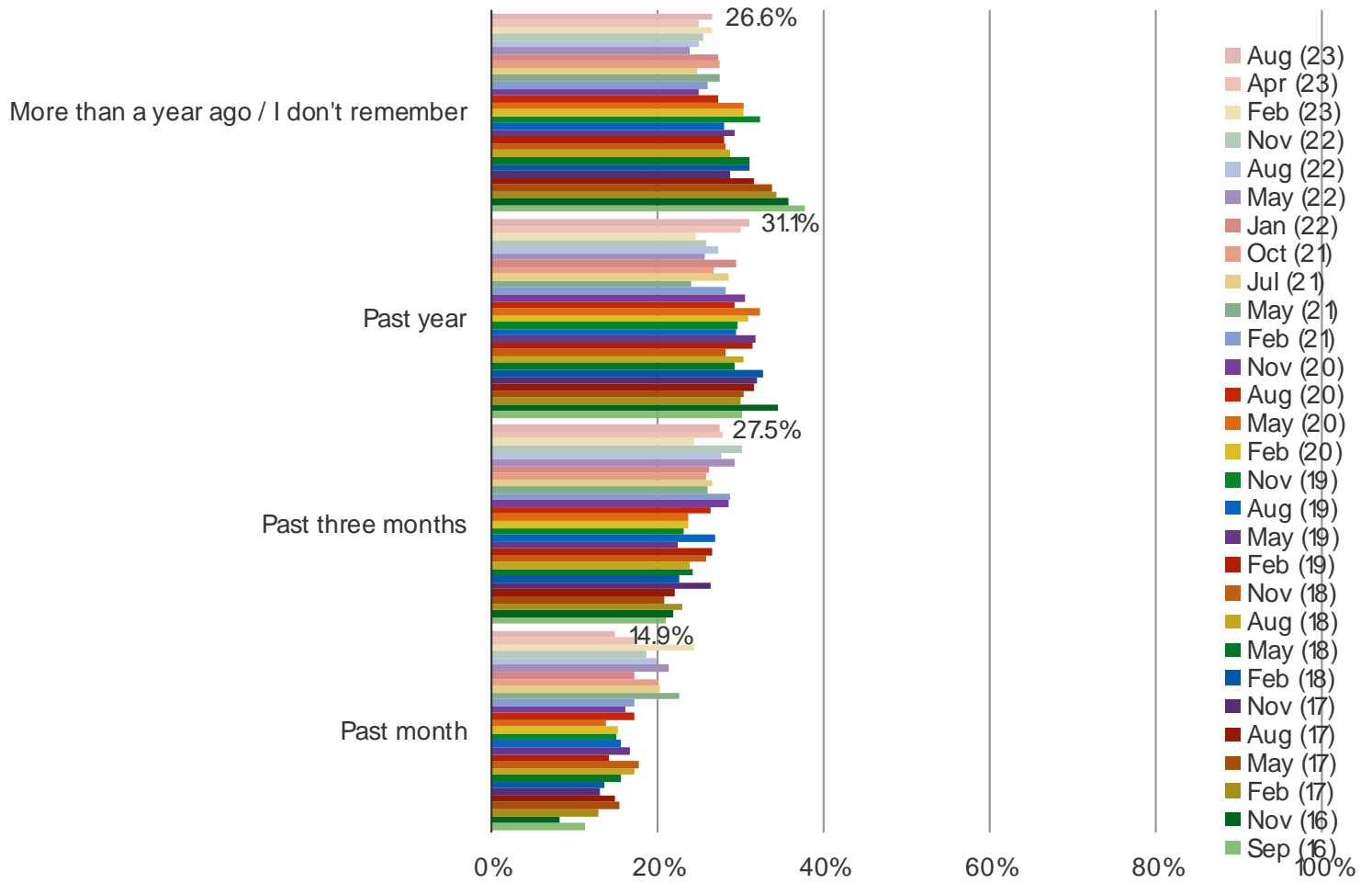
By How Consumers Prefer To Buy Footwear



SNEAKER BUYING TRENDS

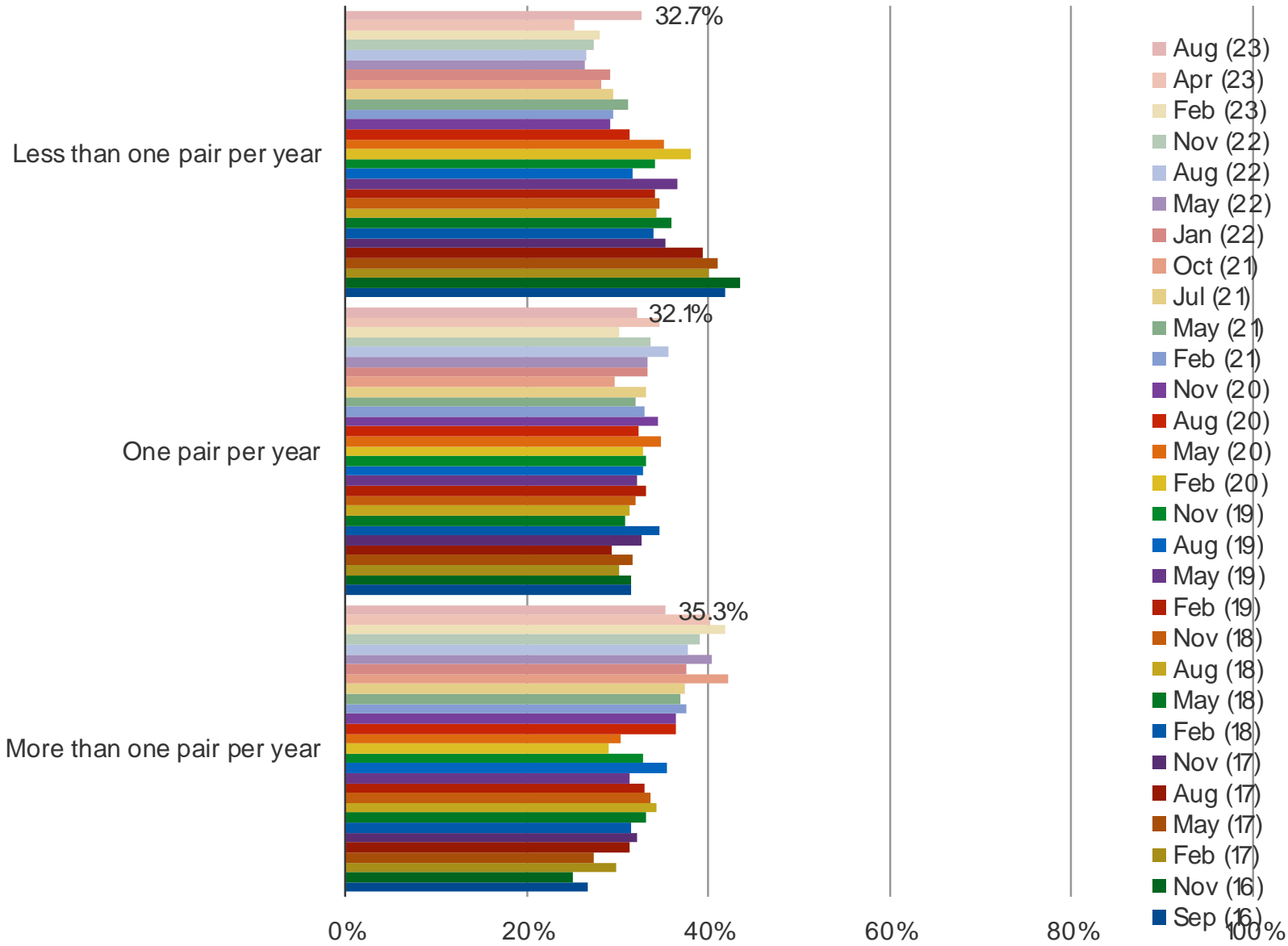
WHEN IS THE LAST TIME YOU BOUGHT A NEW PAIR OF SNEAKERS?

Posed to all respondents



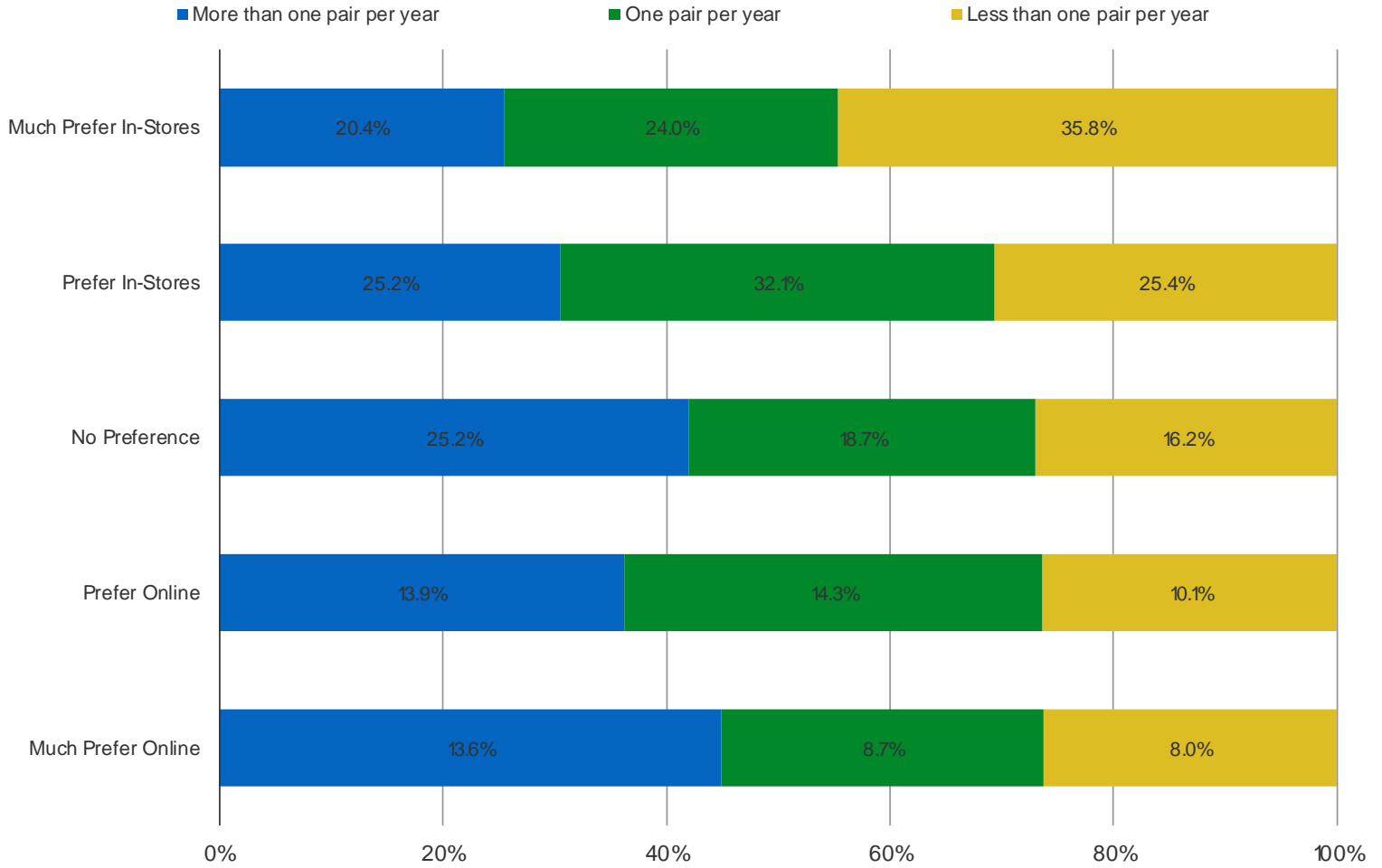
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

Posed to all respondents



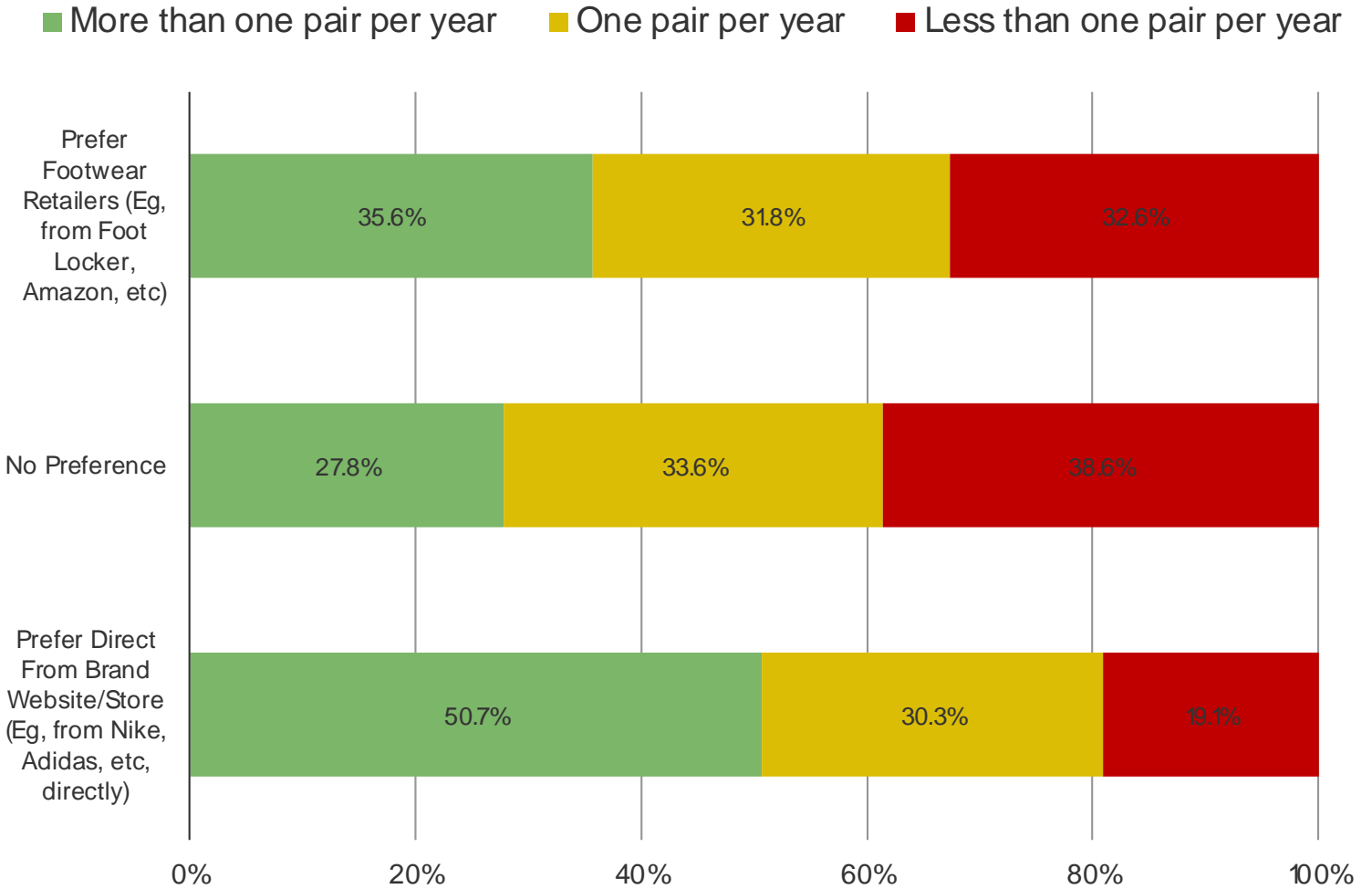
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

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



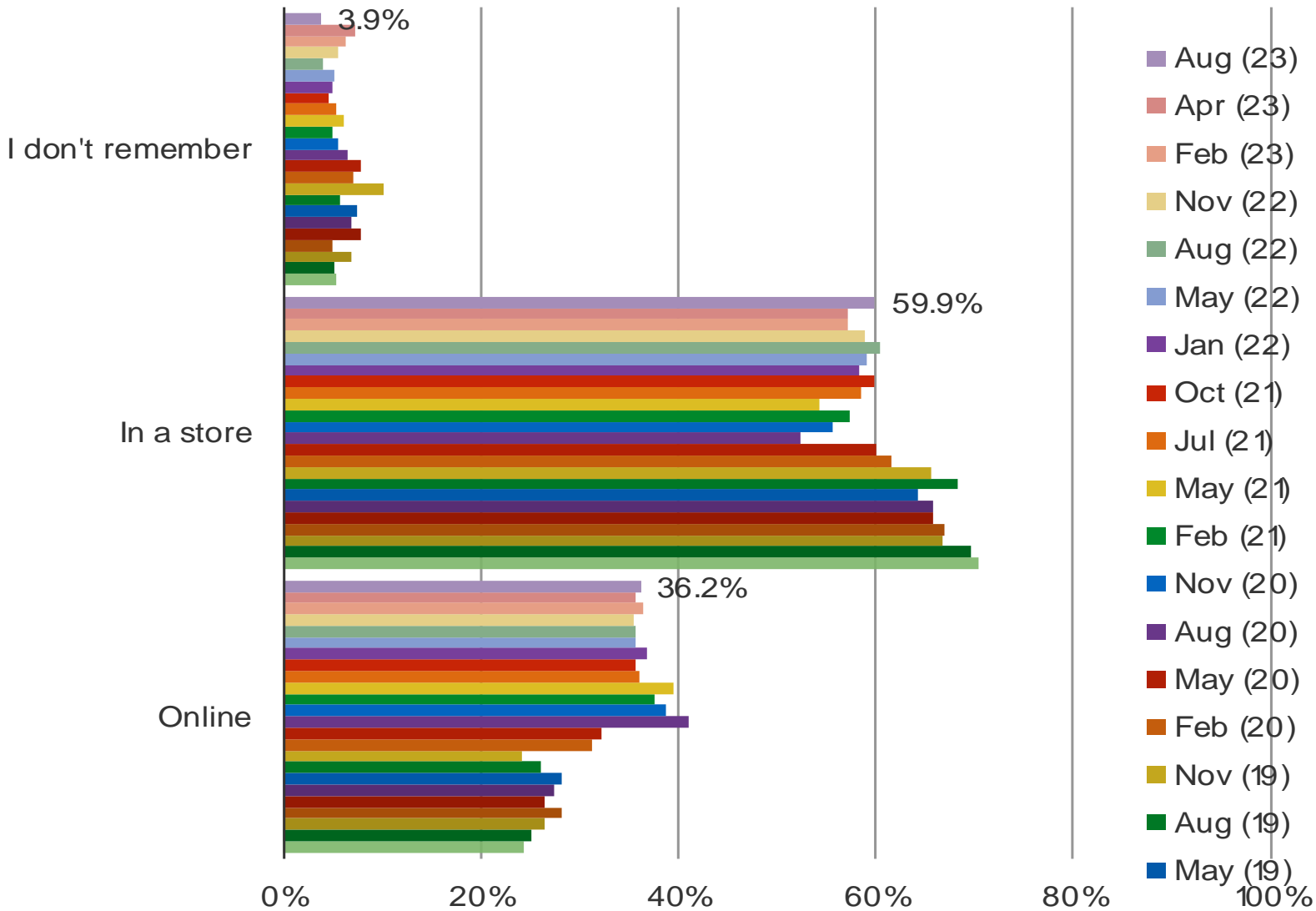
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

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?

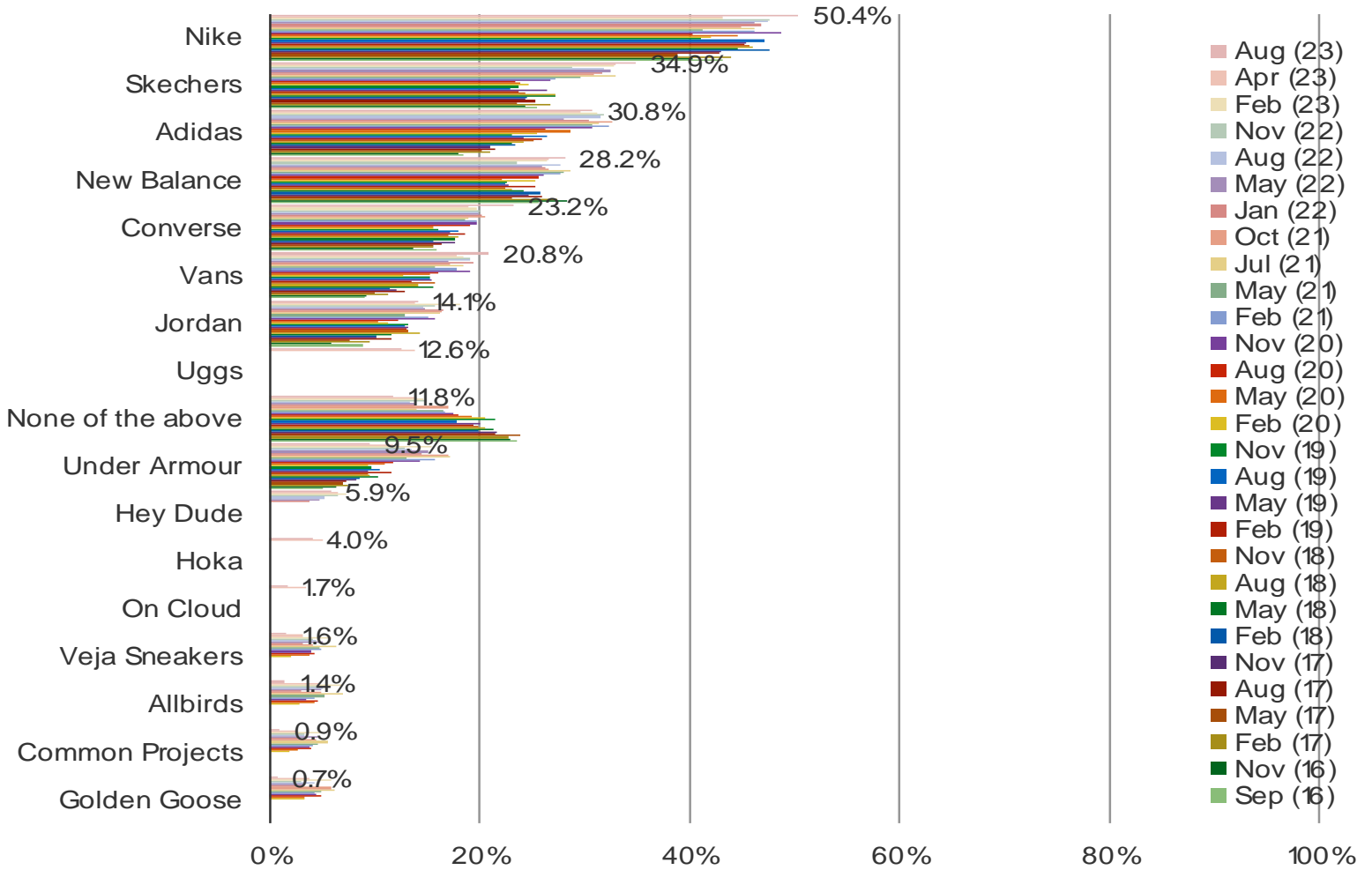
Posed to all respondents



SNEAKER BRANDS

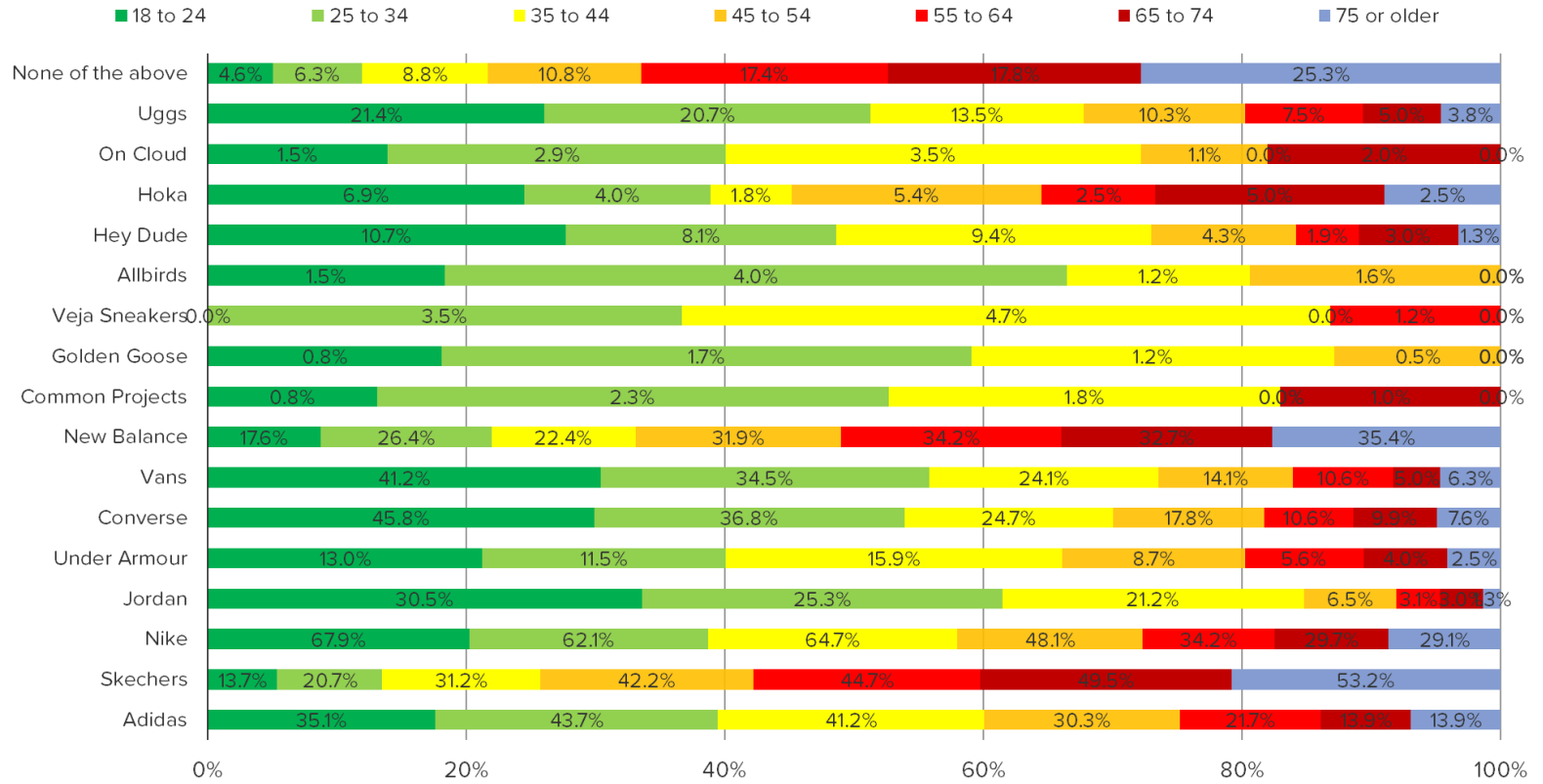
WHICH OF THE FOLLOWING BRANDS DO YOU OWN SNEAKERS FROM?

Posed to all respondents



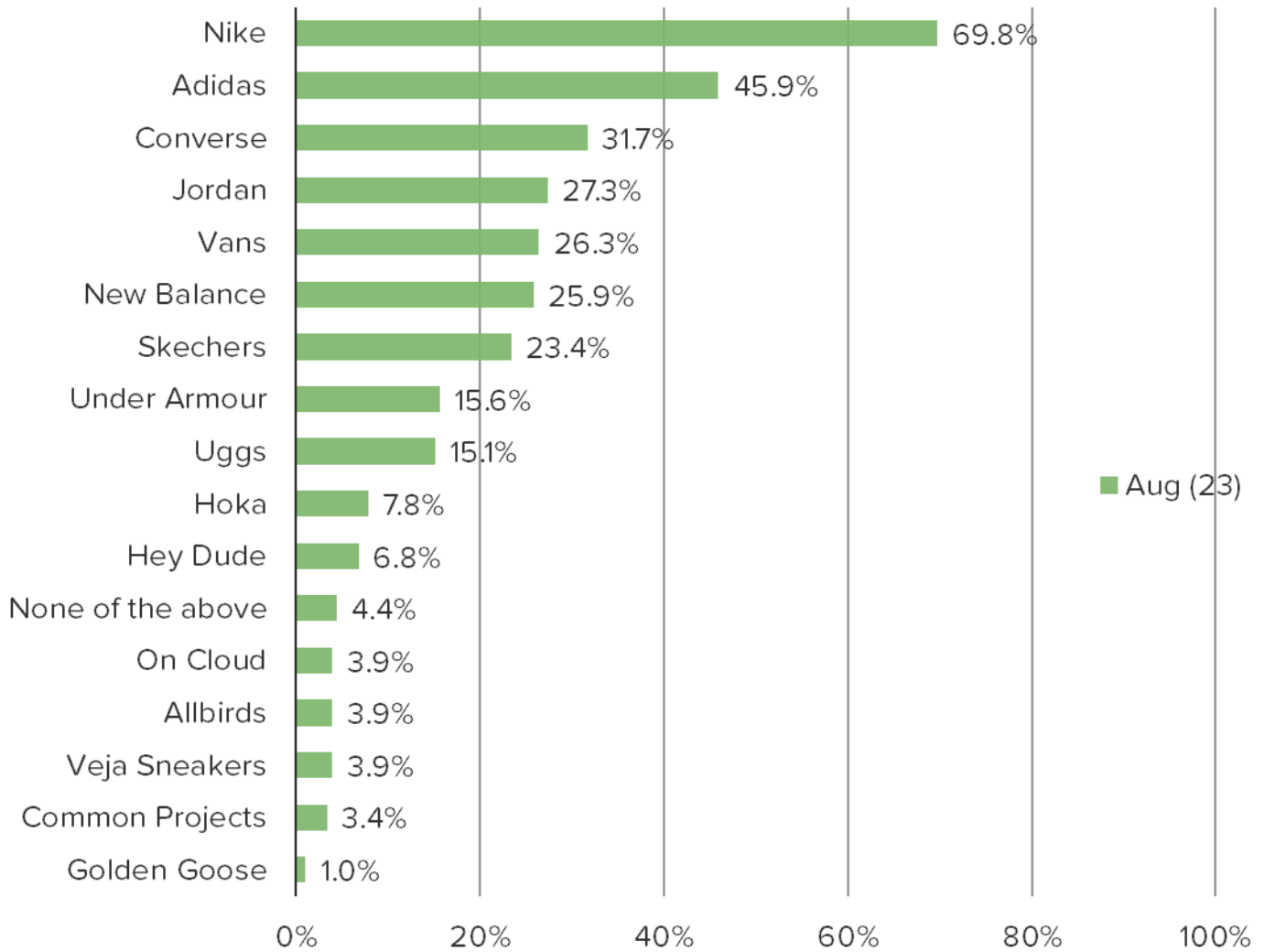
WHICH OF THE FOLLOWING FOOTWEAR BRANDS DO YOU OWN SNEAKERS/FOOTWEAR FROM? (SELECT ALL THAT APPLY)

Age of respondents who selected each of the below...



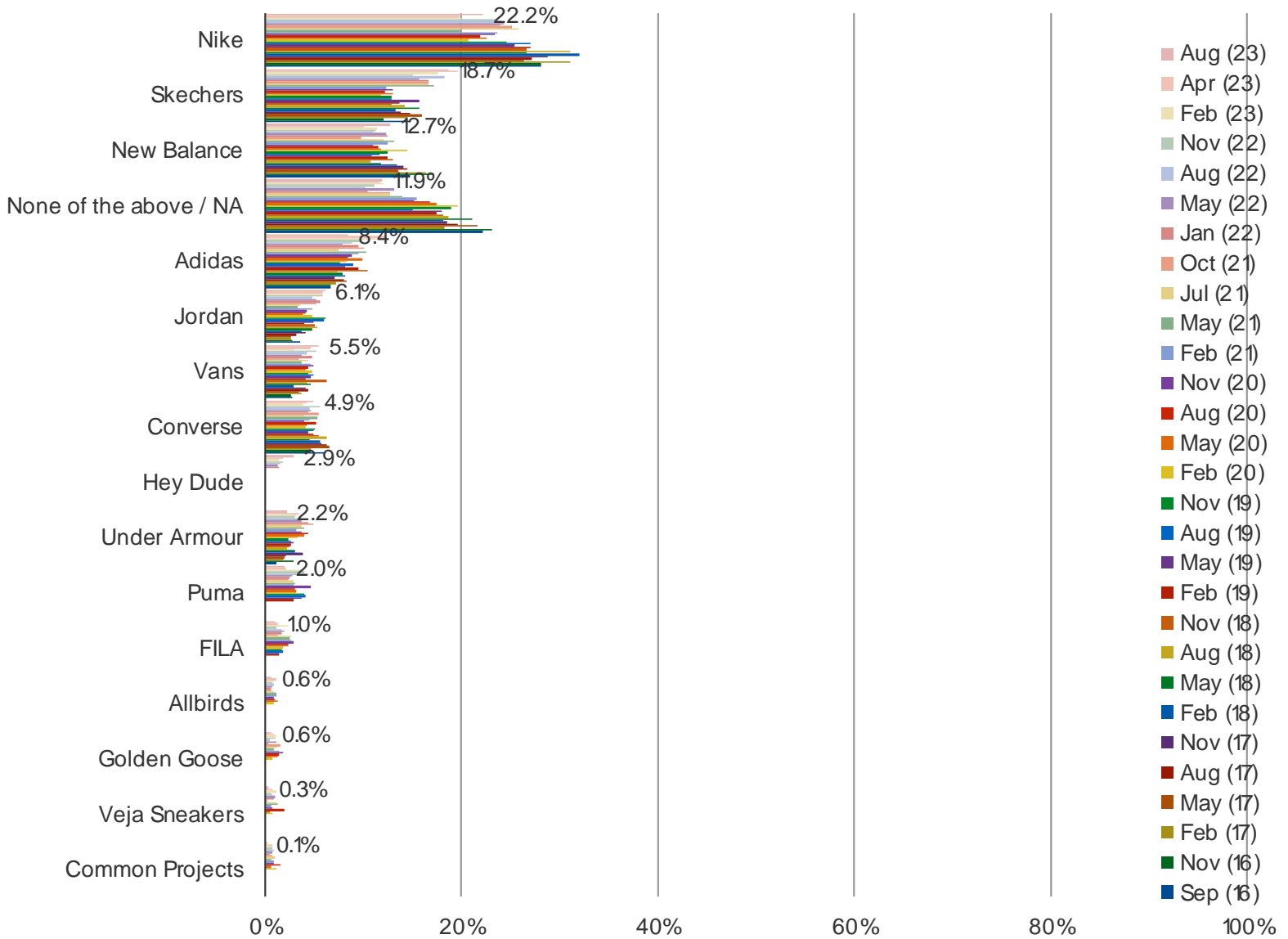
WHICH OF THE FOLLOWING FOOTWEAR BRANDS DO YOU OWN SNEAKERS/FOOTWEAR FROM?

Posed to respondents who said they run for exercise frequently or very frequently (N = 205)



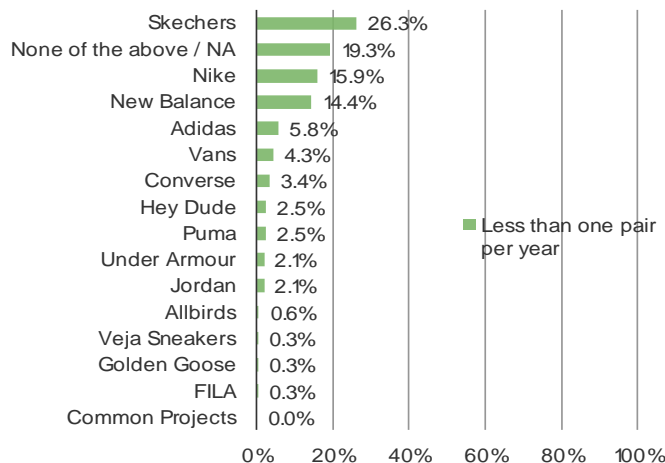
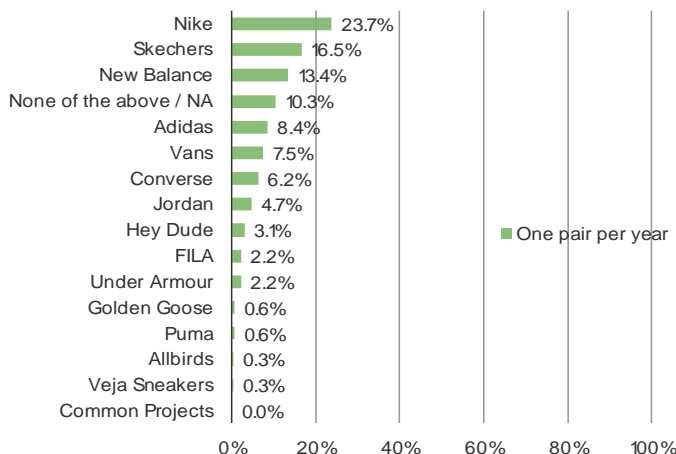
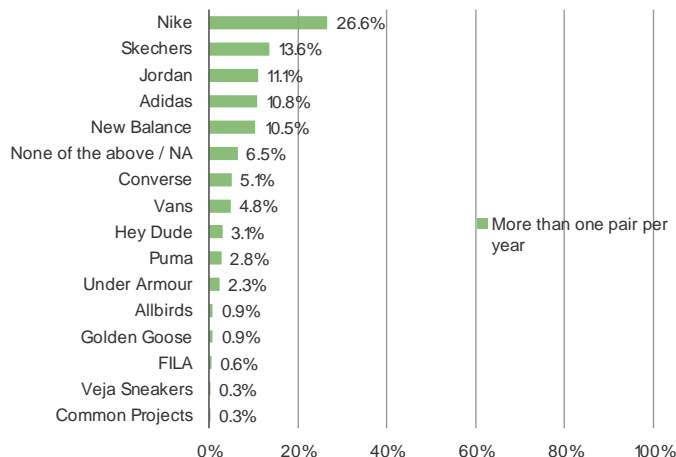
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

Posed to all respondents



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

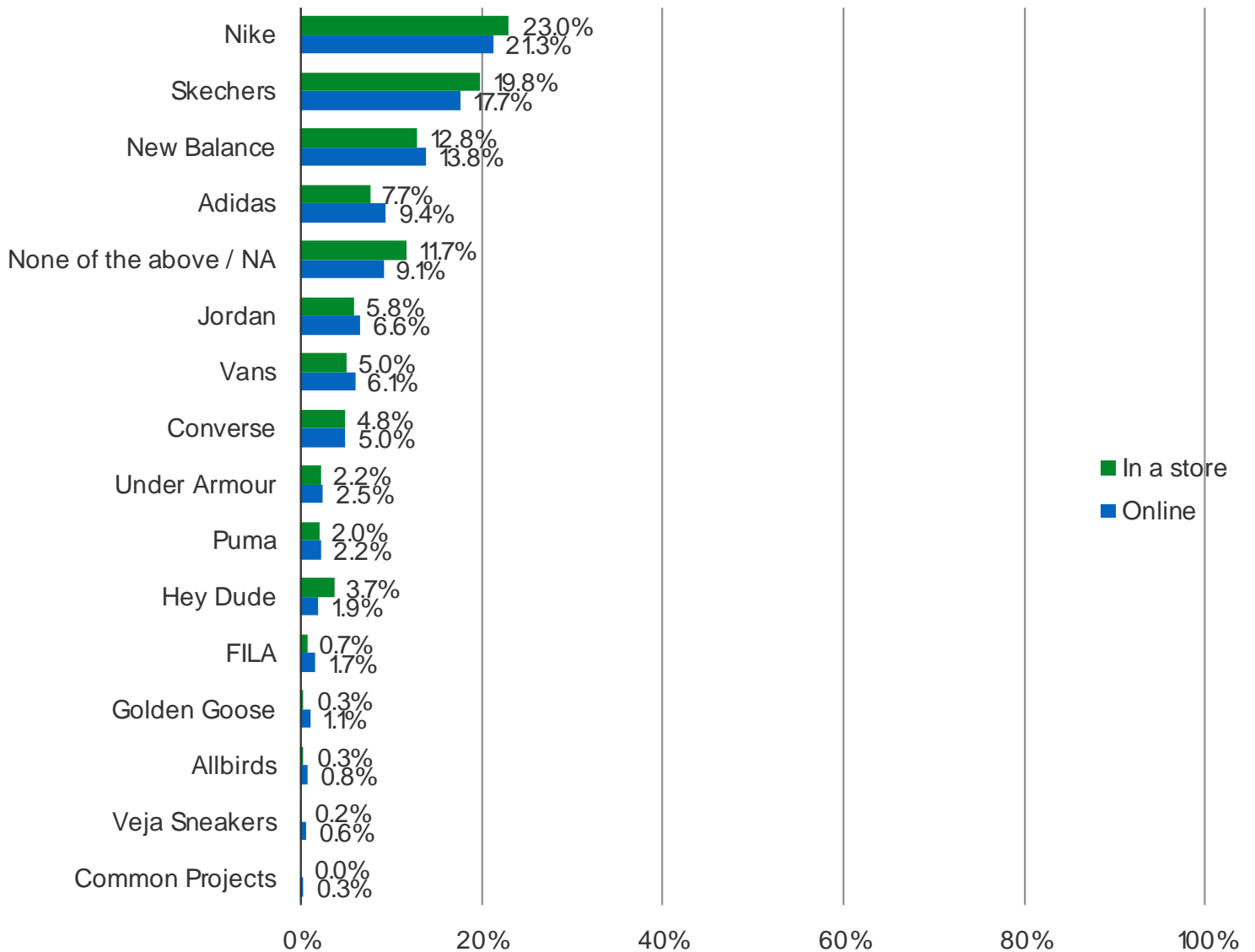
Posed to all respondents – Cross-tabbed by how often they buy sneakers.



Footwear and Athletic Wear

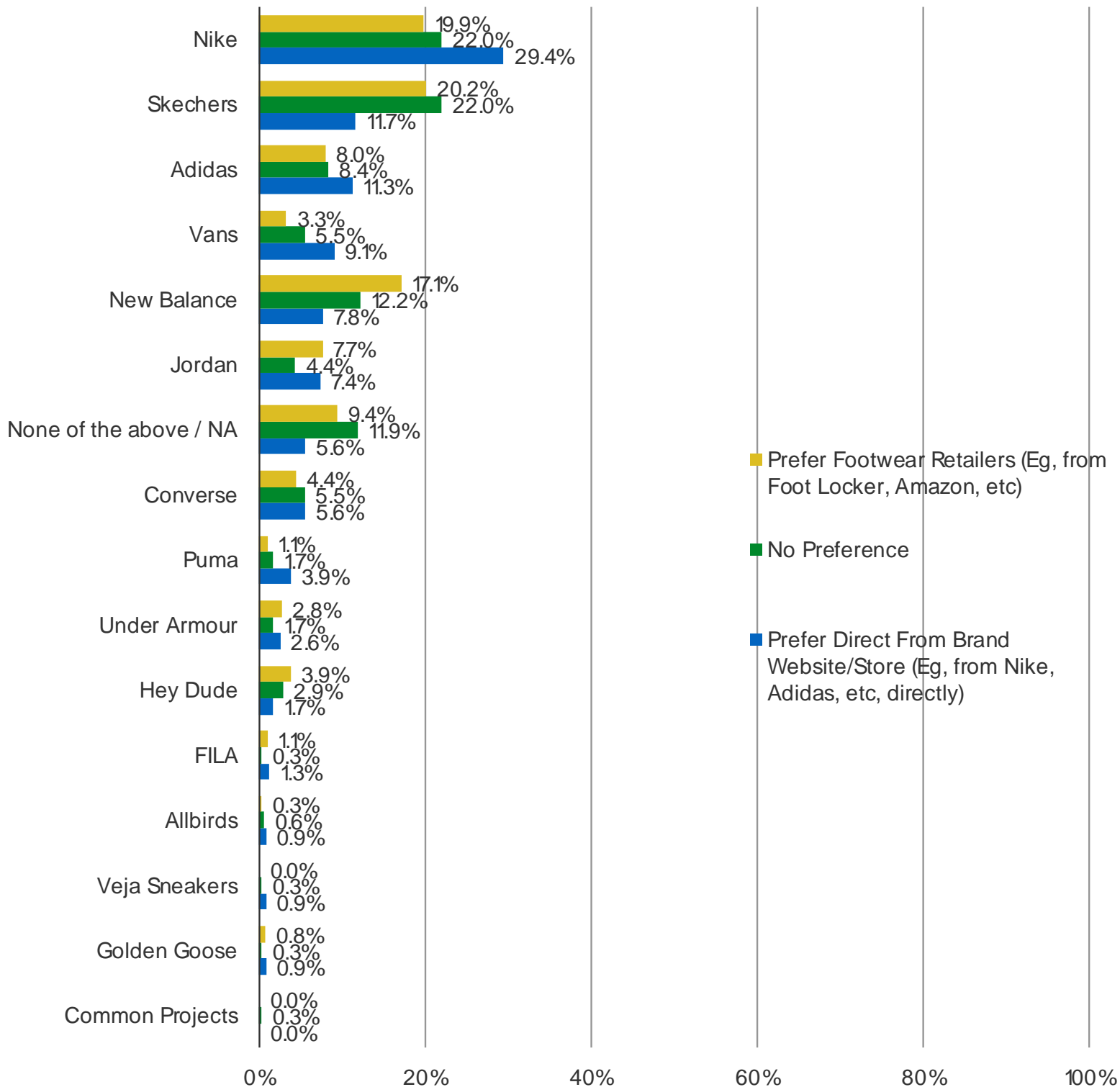
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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



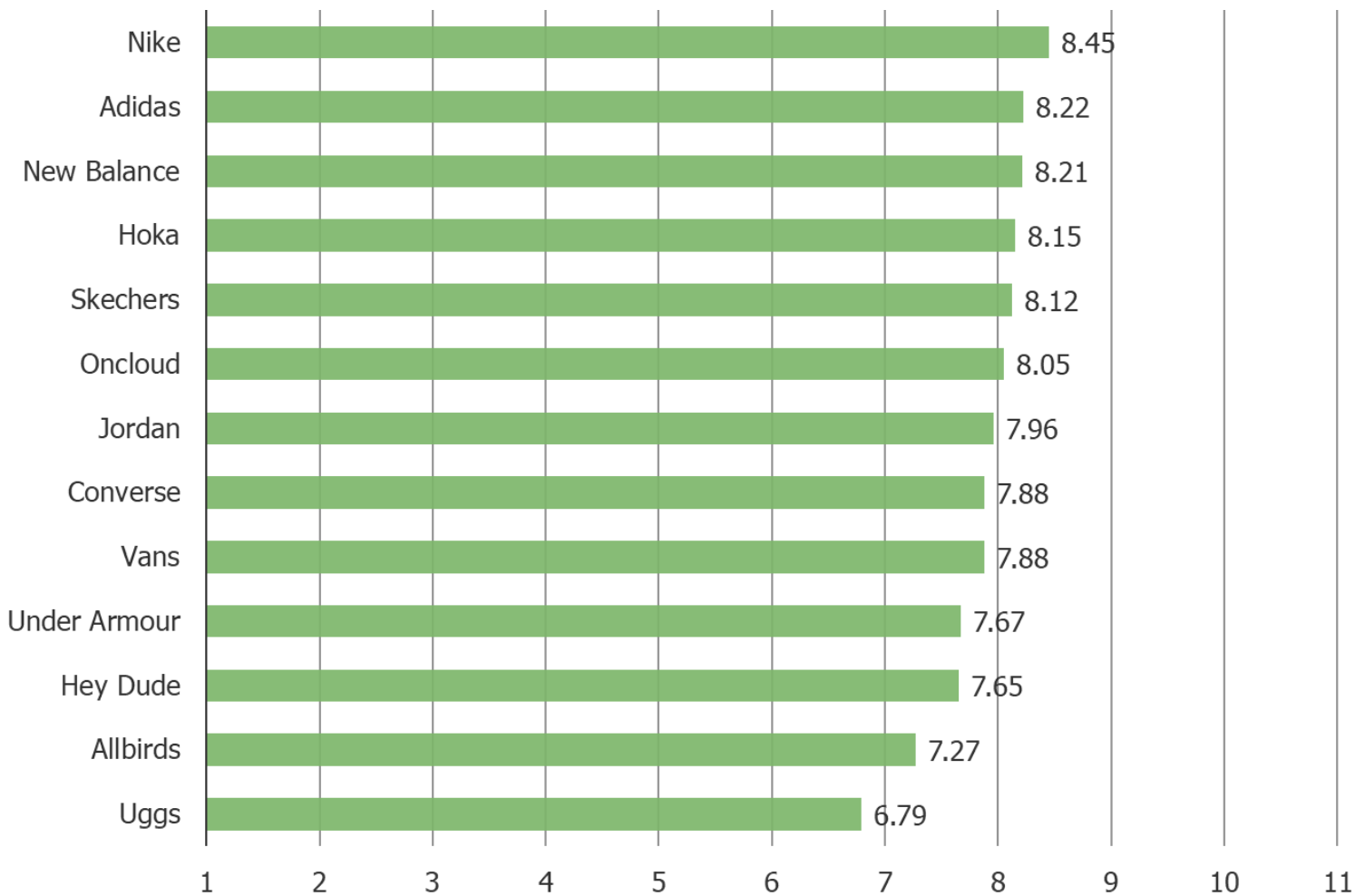
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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



WHAT IS YOUR OPINION OF THE FOLLOWING FOOTWEAR BRANDS?

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



Scale of 1-11

1 = Very Negative

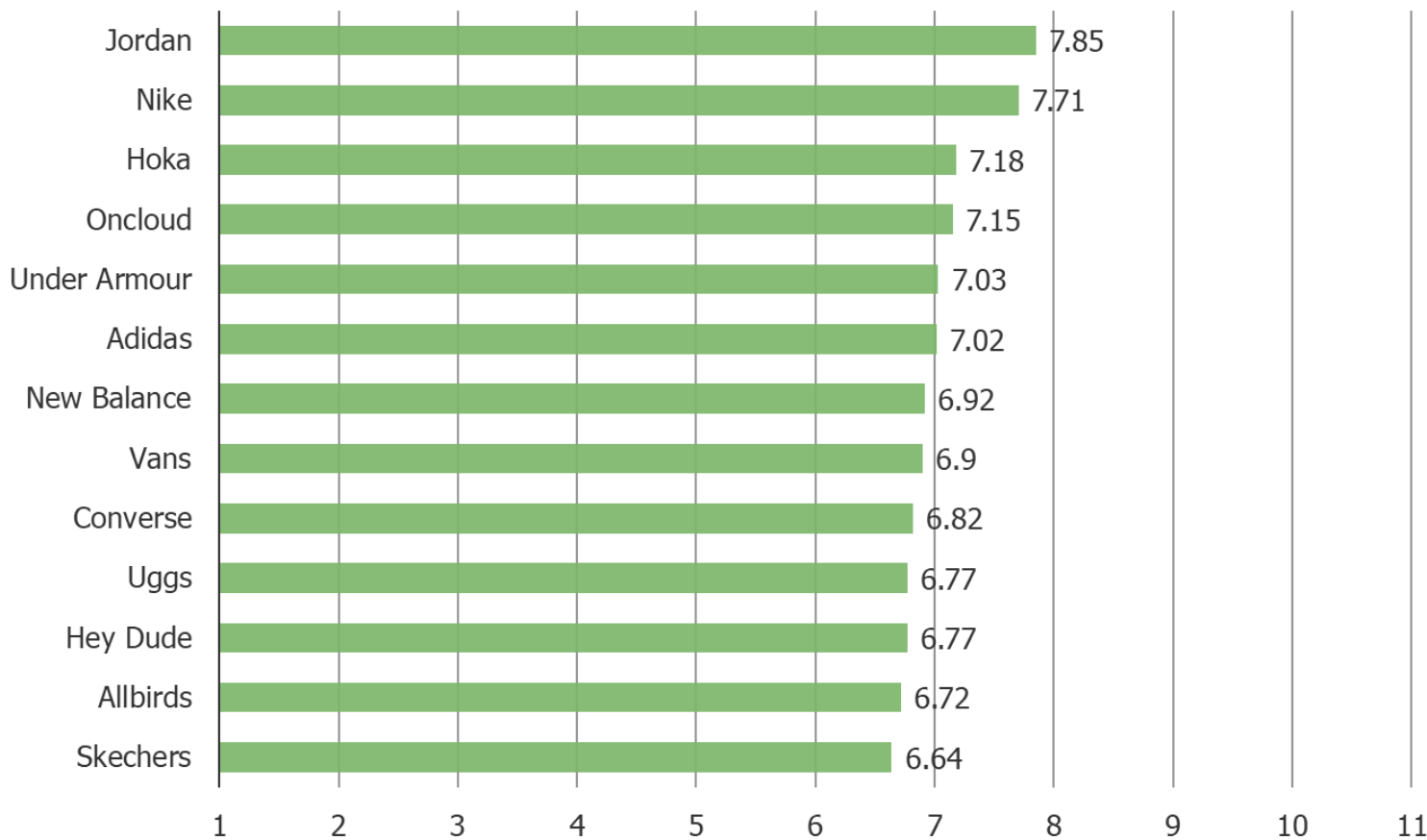
11 = Very Positive

Nike	905
Adidas	880
Skechers	819
Converse	800
New Balance	783
Vans	711
Jordan	697
Uggs	689
Under Armour	587
Hey Dude	217
Hoka	176
Allbirds	116
Oncloud	66

Footwear and Athletic Wear

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:



Scale of 1-11

1 = Very Weak Pricing Power

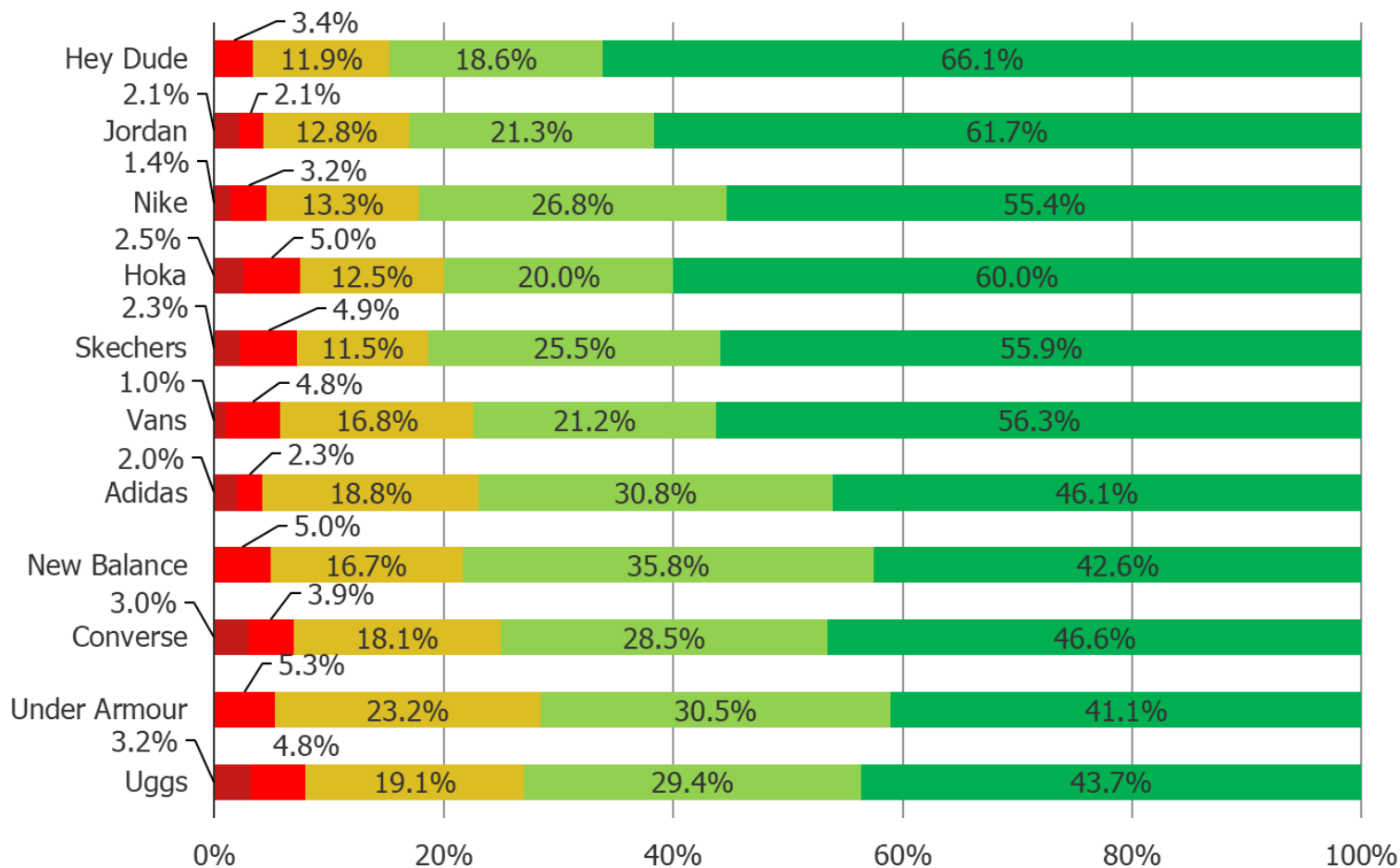
11 = Very Strong Pricing Power

Nike	905
Adidas	880
Skechers	819
Converse	800
New Balance	783
Vans	711
Jordan	697
Uggs	689
Under Armour	587
Hey Dude	217
Hoka	176
Allbirds	116
Oncloud	66

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.

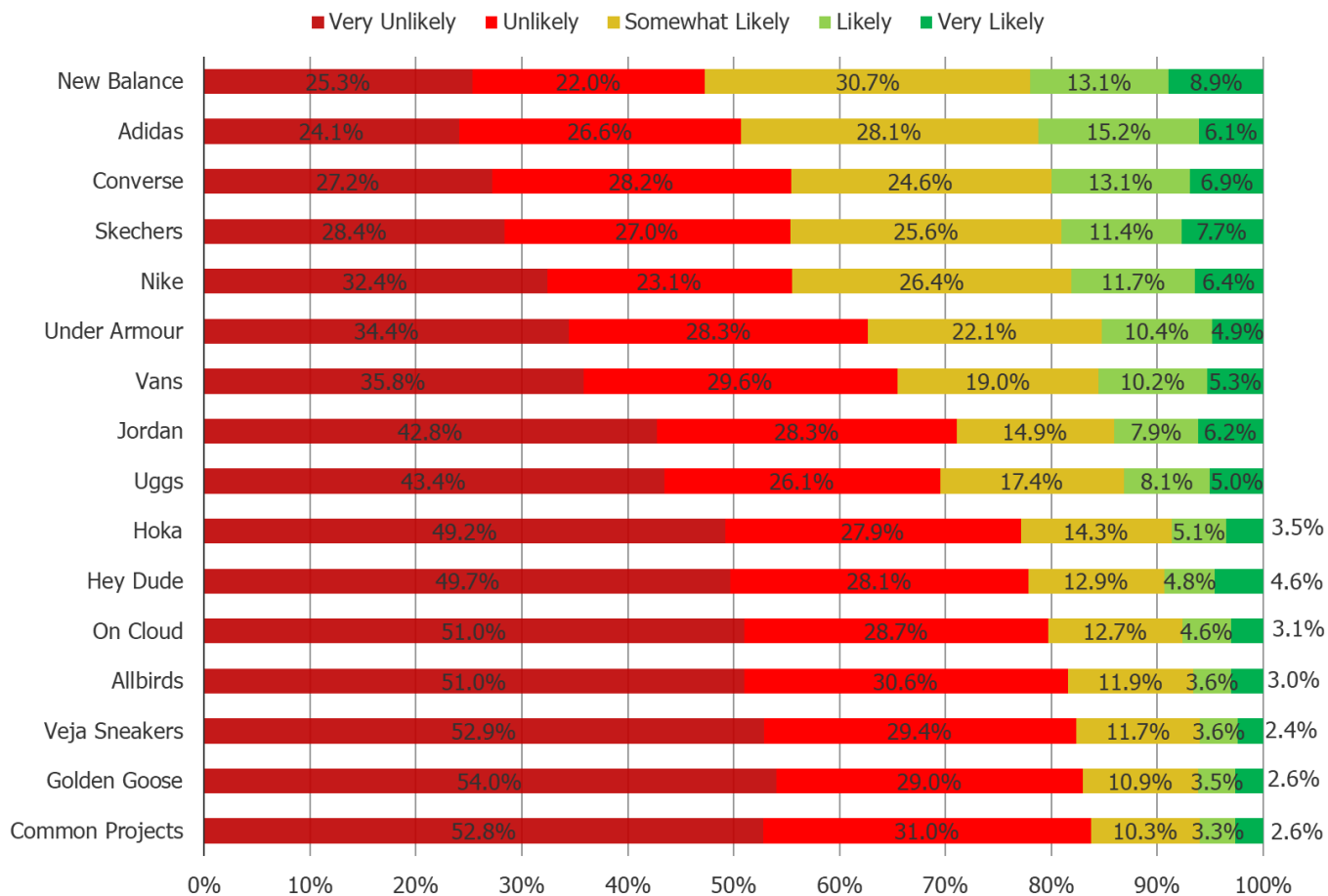
Very Unlikely Unlikely Somewhat Likely Likely Very Likely



	N =
Nike	504
Skechers	349
Adidas	308
New Balance	282
Converse	232
Vans	208
Jordan	141
Uggs	126
Under Armour	95
Hey Dude	59
Hoka	40

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.

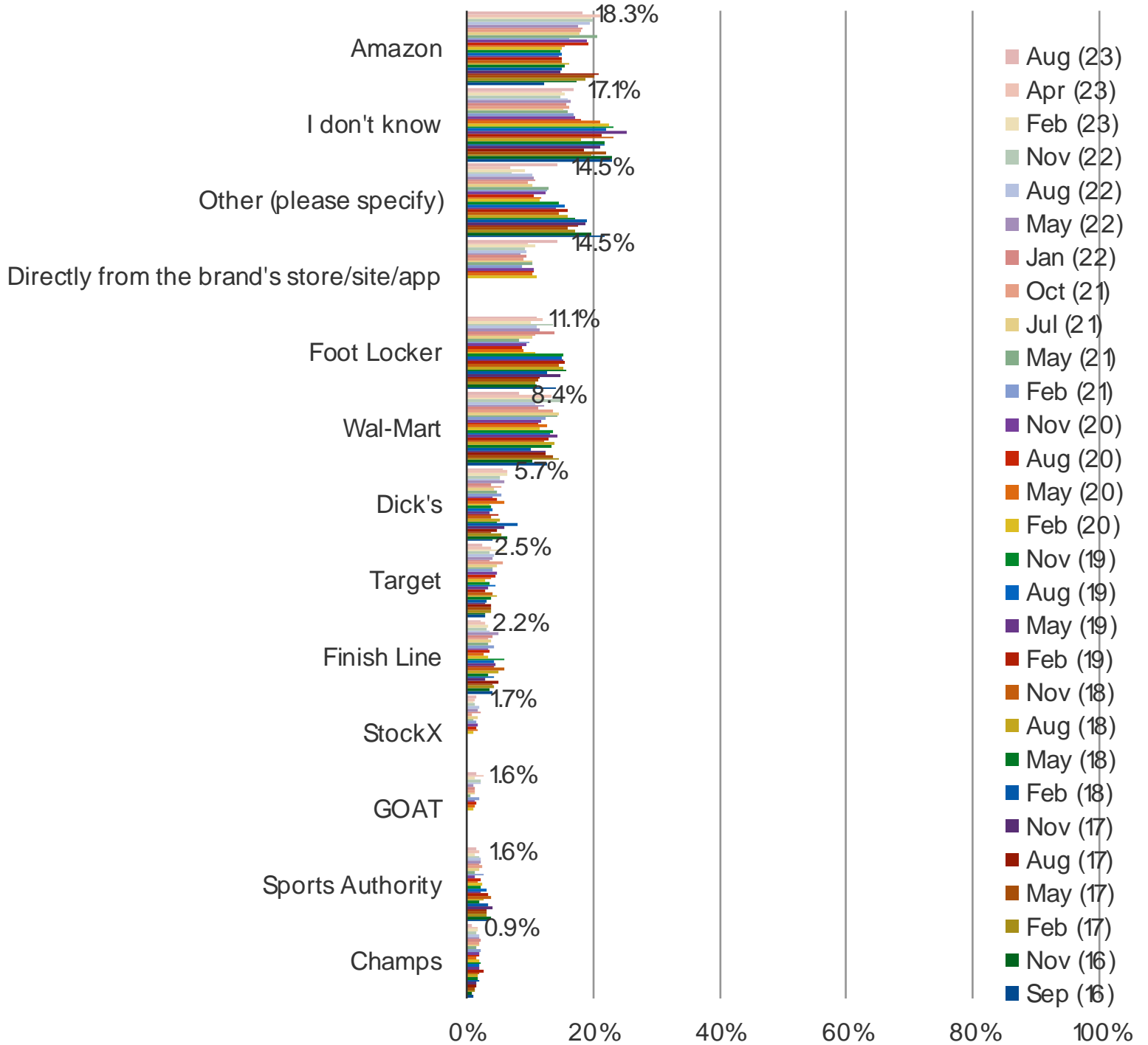


	N=
Adidas	693
Skechers	652
Nike	497
Jordan	860
Under Armour	906
Converse	769
Vans	793
New Balance	719
Common Projects	992
Golden Goose	994
Veja Sneakers	985
Allbirds	987
Hey Dude	942
Hoka	961
On Cloud	984
Uggs	875

FOOTWEAR RETAILERS

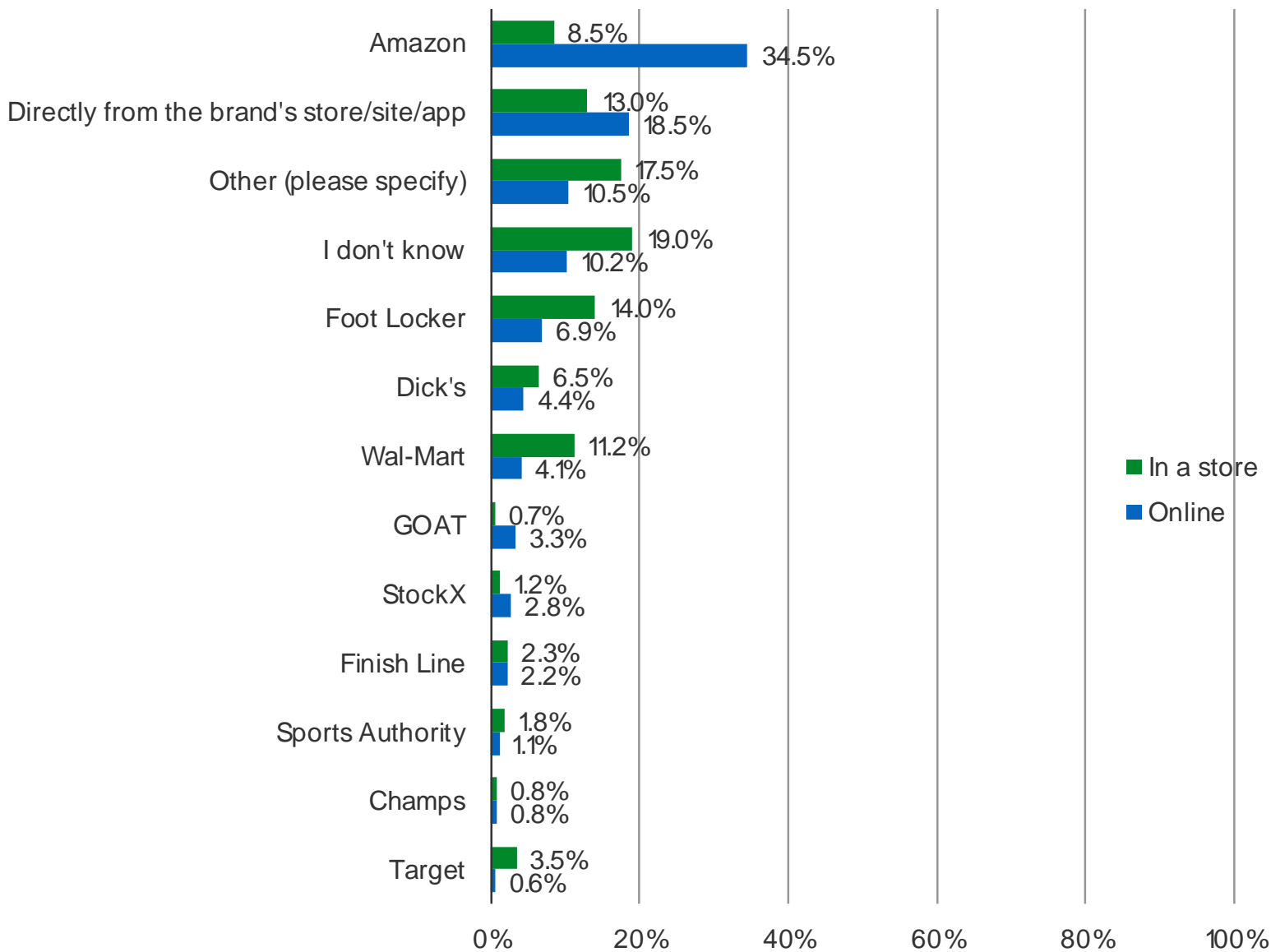
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

Posed to all respondents



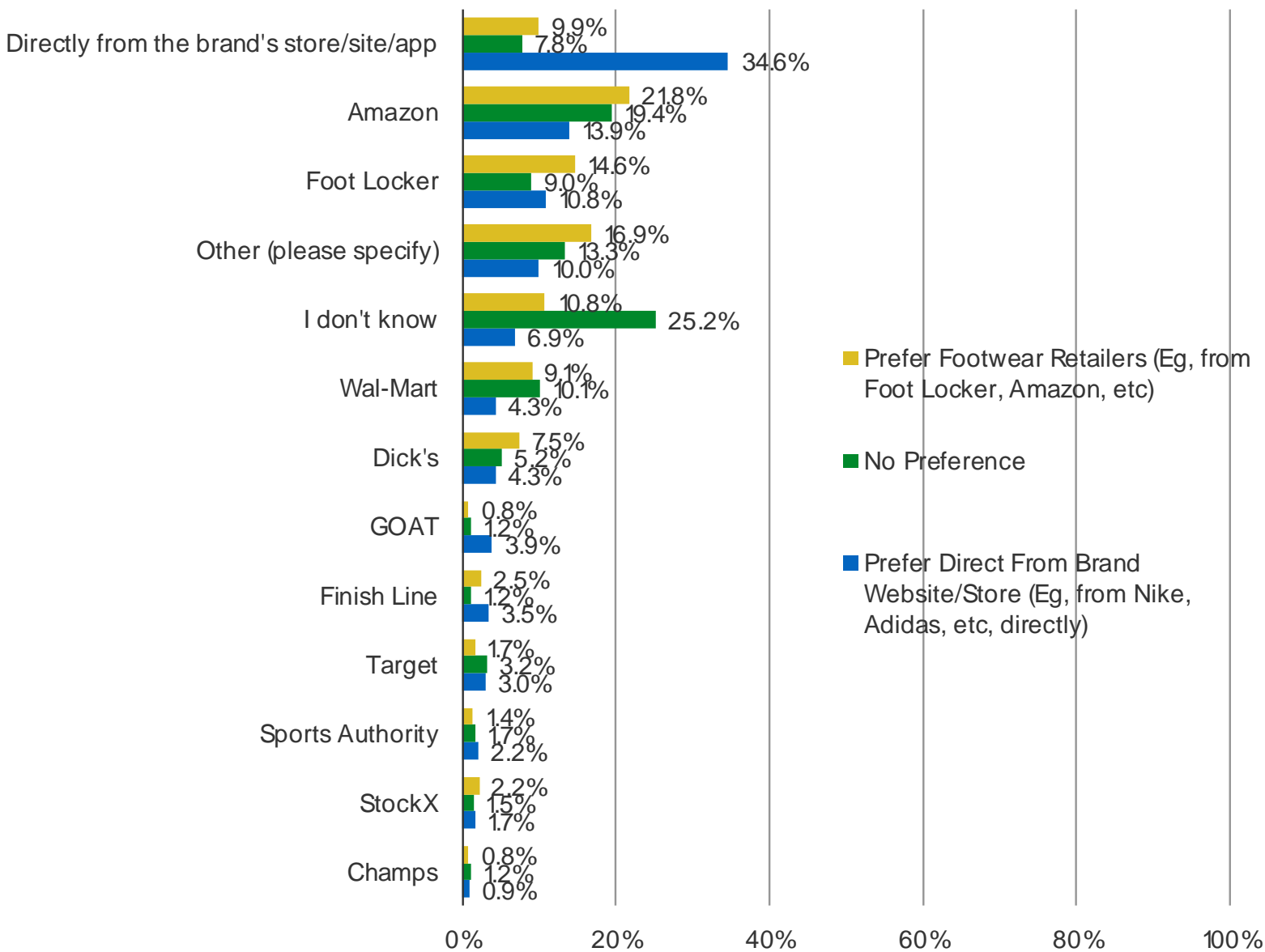
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



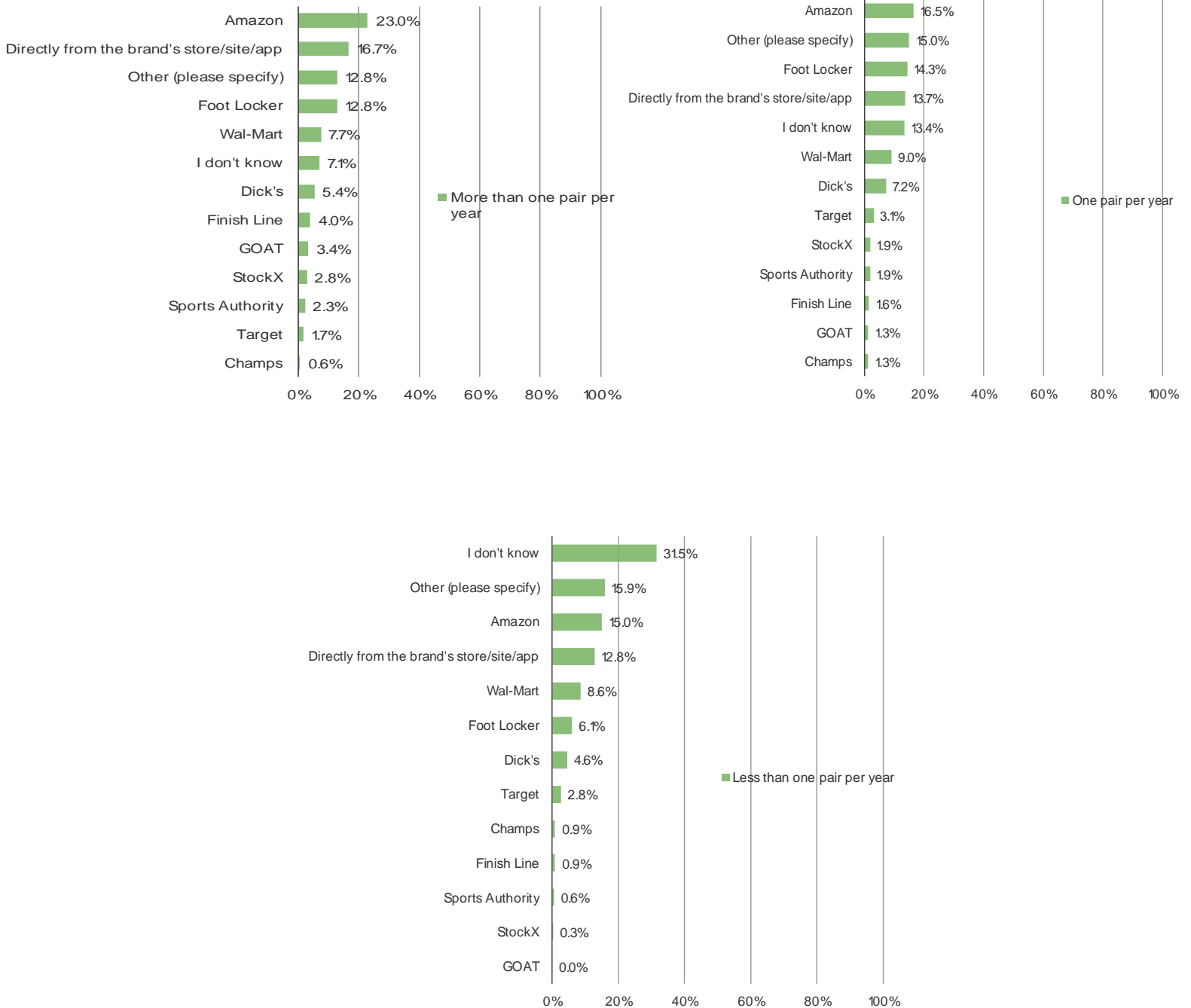
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



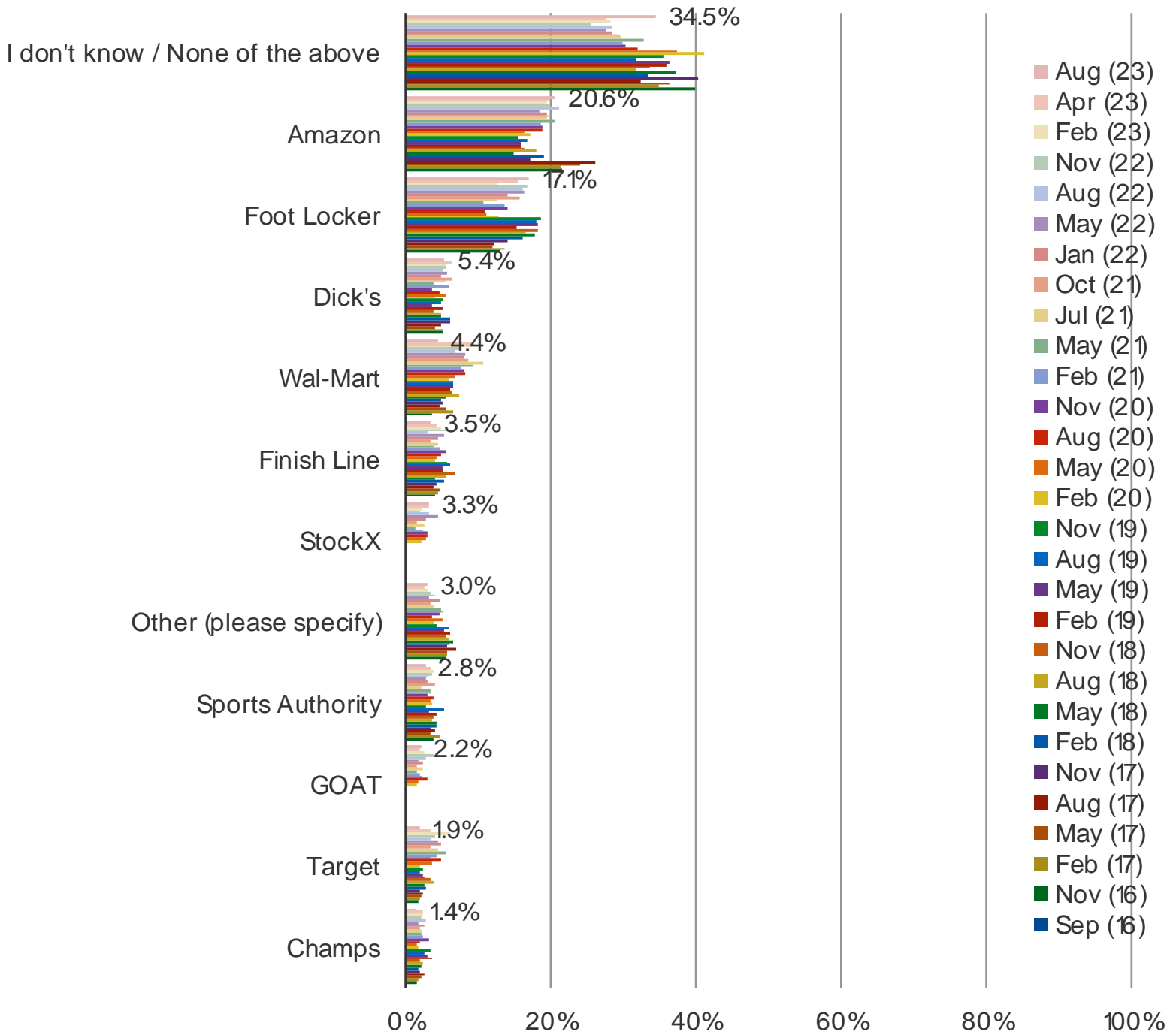
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



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

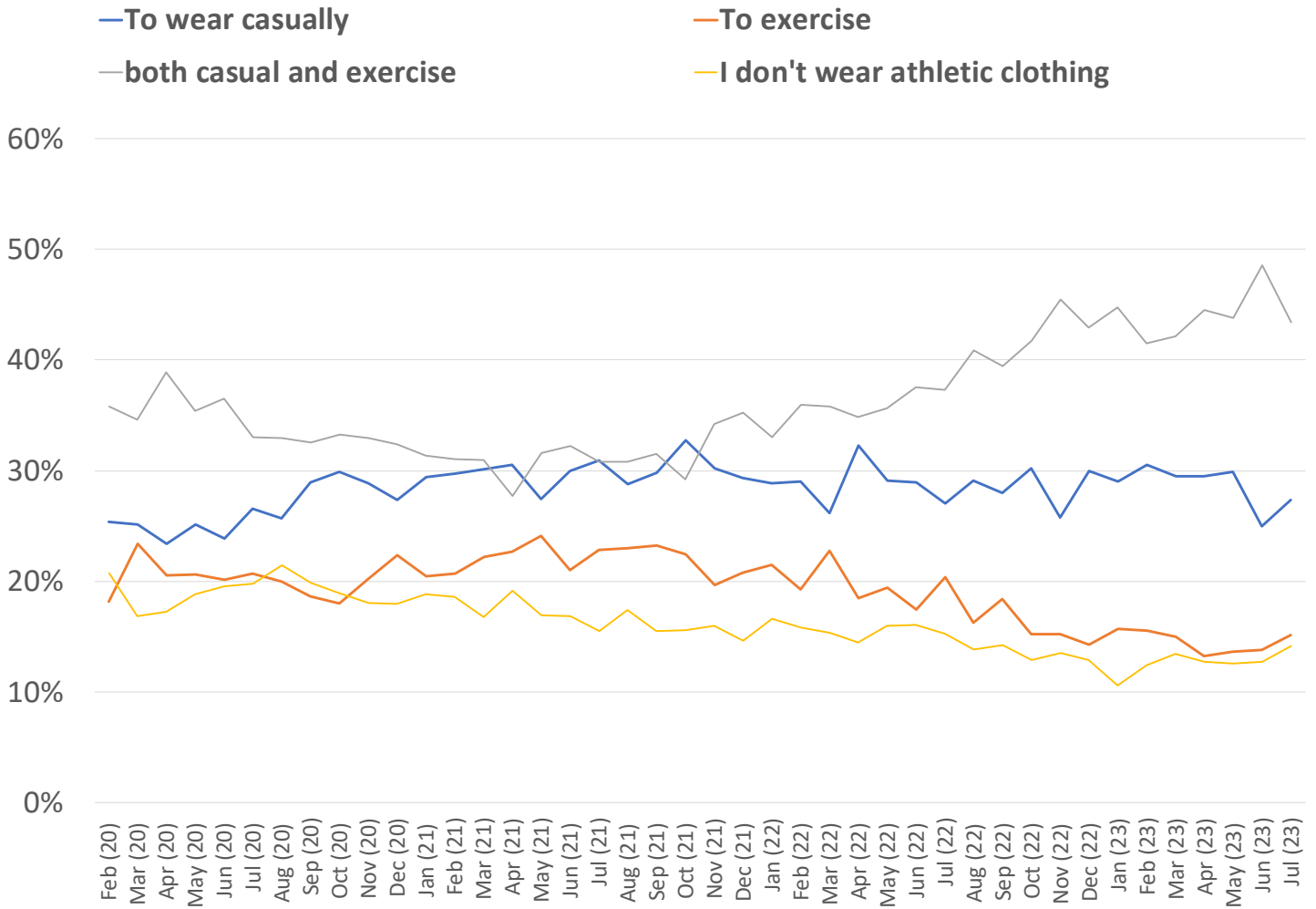
Posed to all respondents



CASUAL WEAR

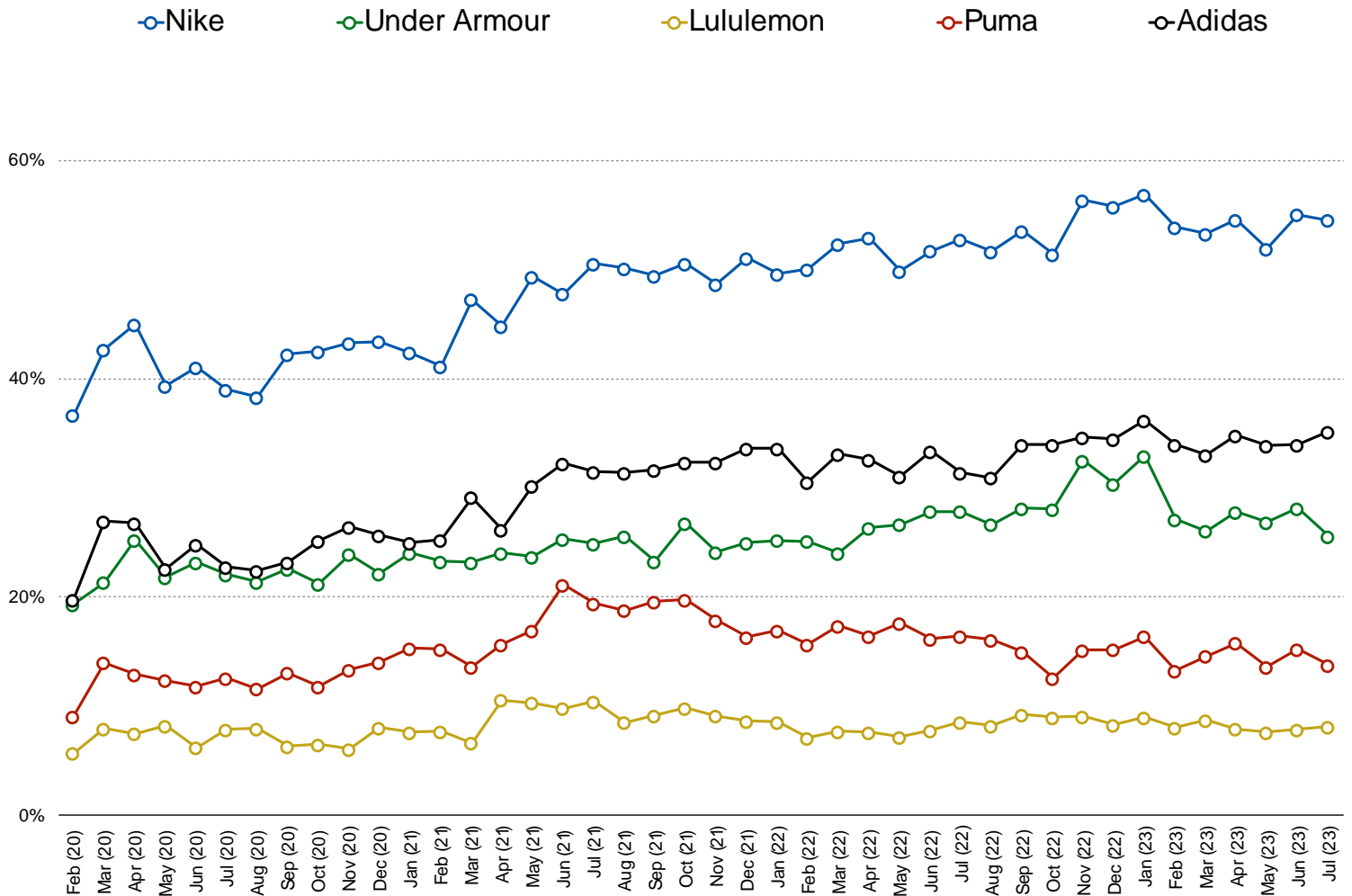
WHAT DO YOU USE ATHLETIC CLOTHING FOR?

Posed to all respondents



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

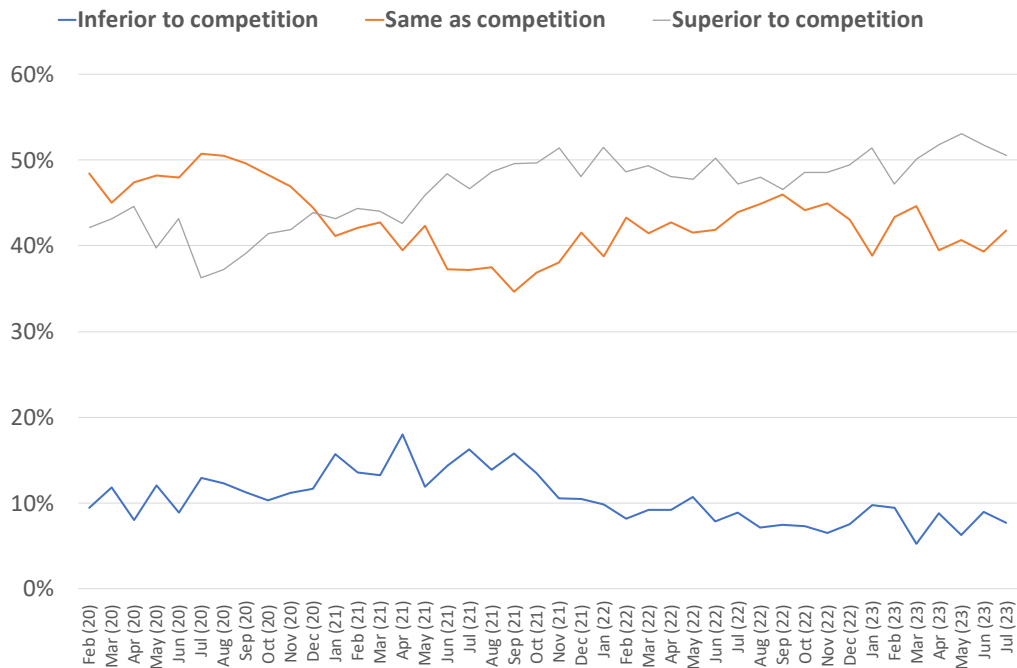
Posed to all respondents



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

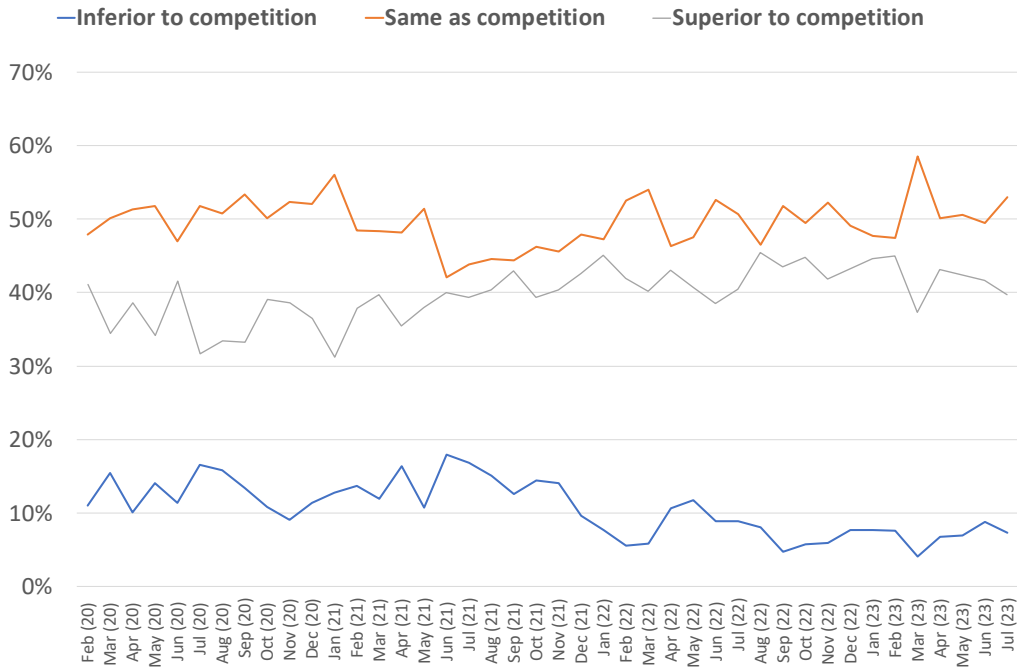
NIKE



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

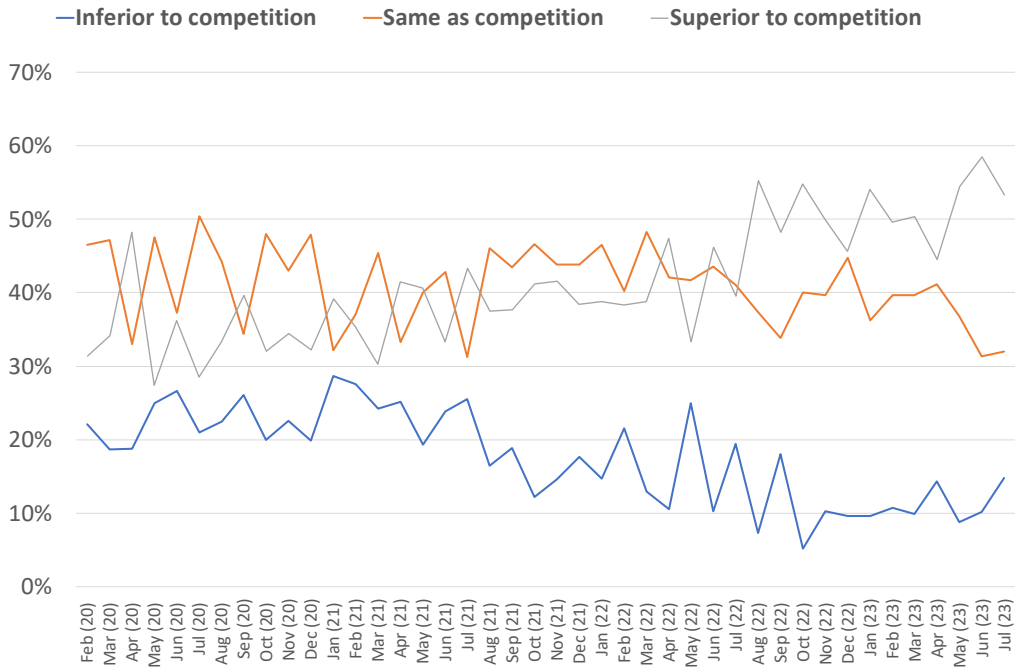
UNDER ARMOUR



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

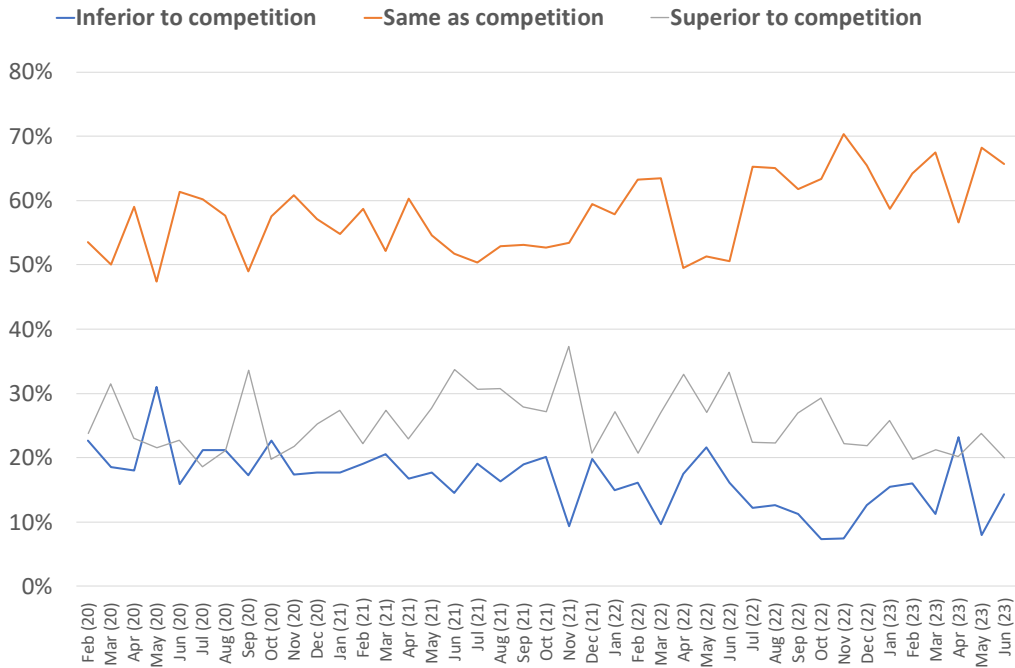
LULULEMON



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

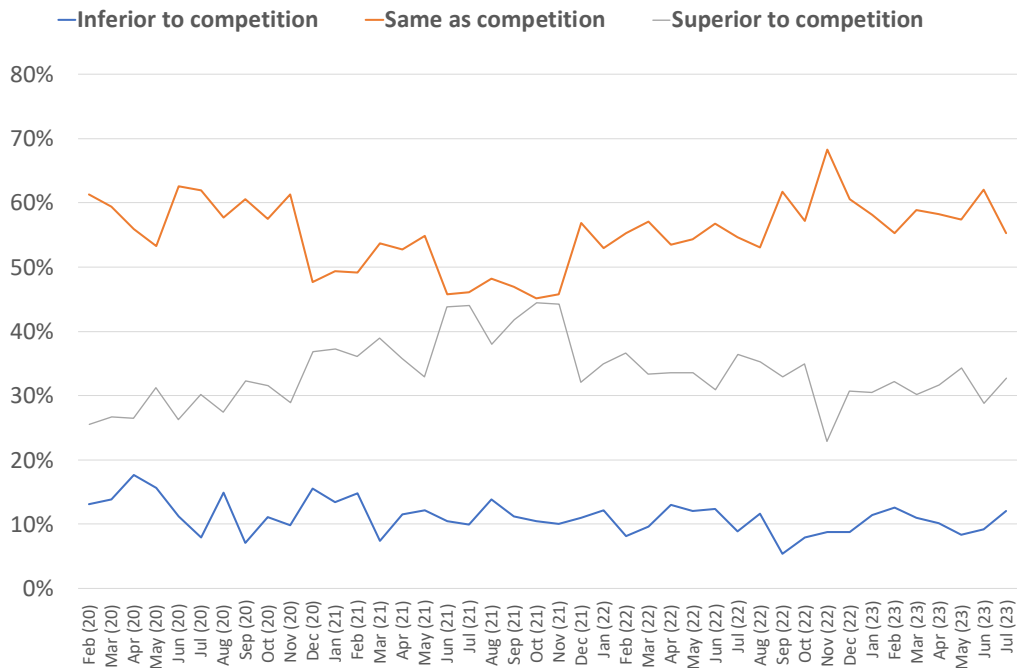
FILA



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

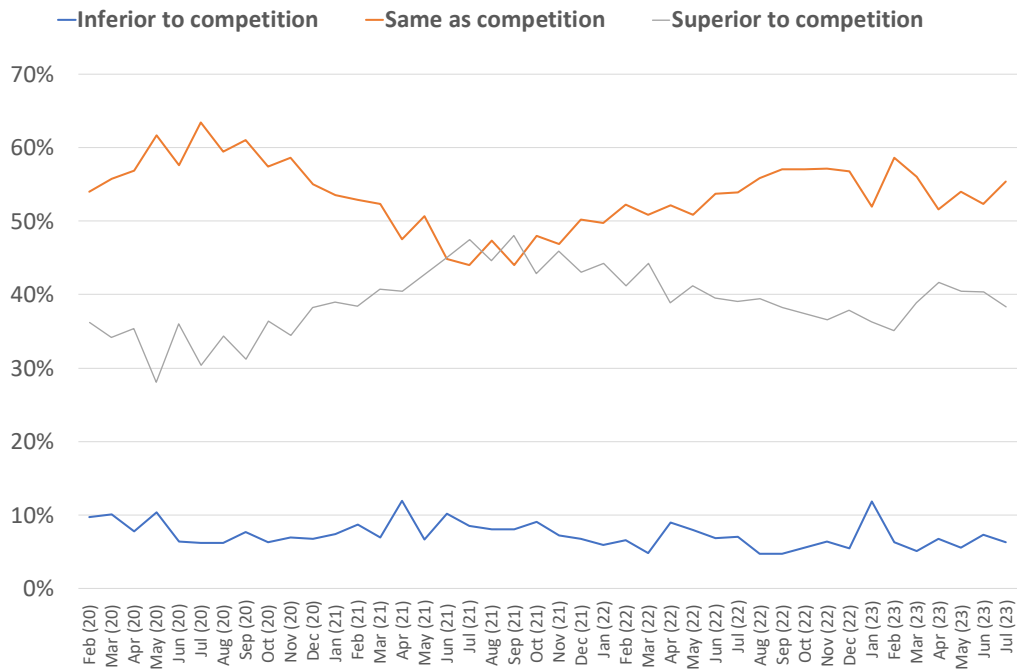
PUMA



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

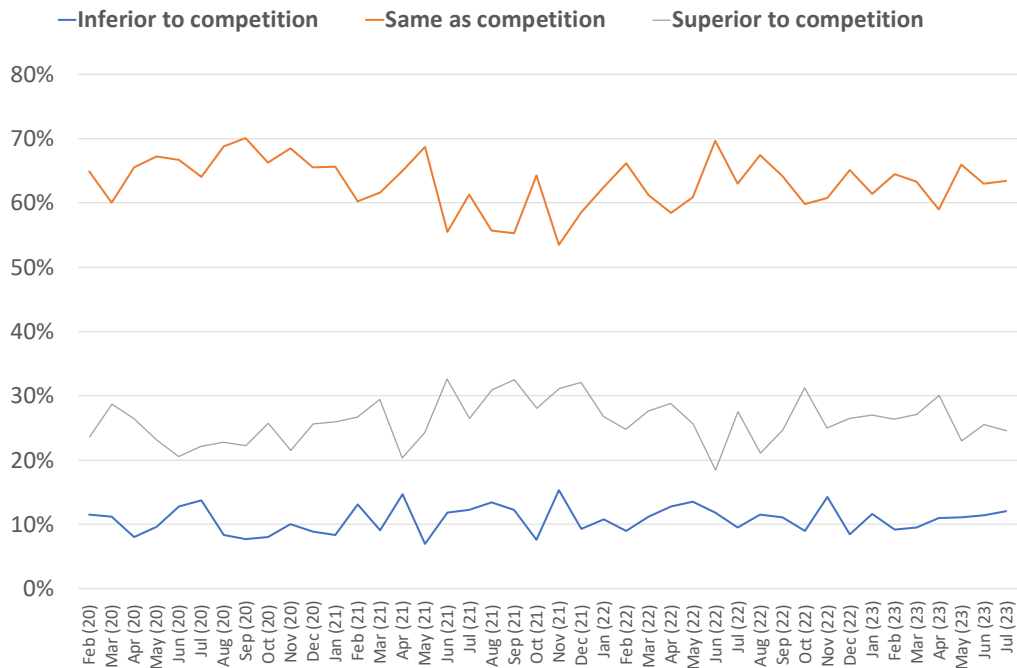
ADIDAS



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

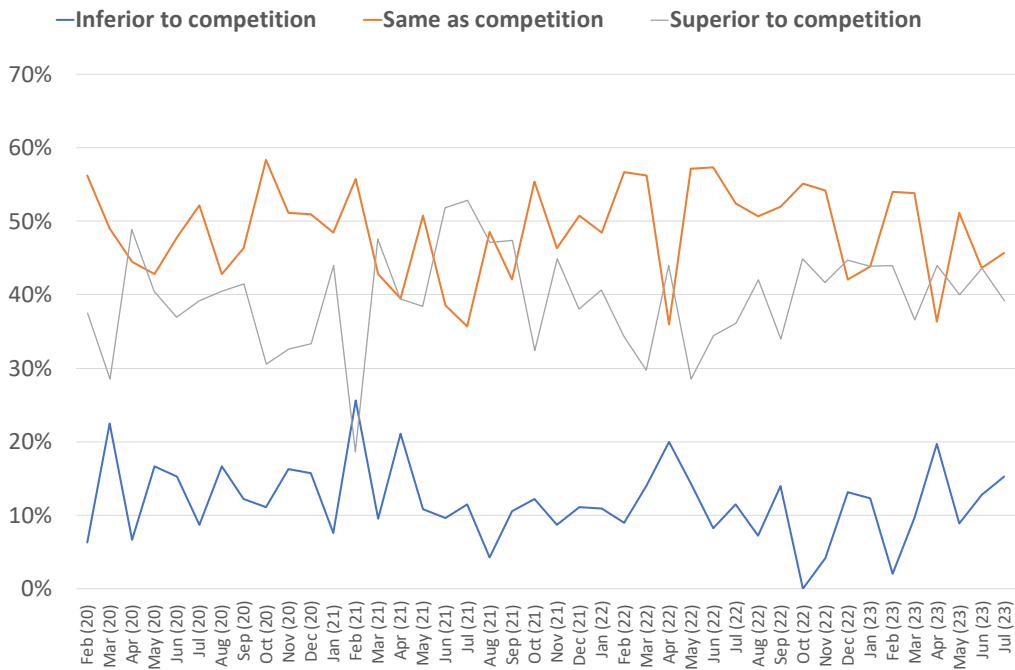
CHAMPION



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

