

Bespoke Survey Research

November 2023

Footwear and Athletic Wear

Volume 30 | Quarterly Survey

1,250 US Consumers Balanced To Census

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

Key Takeaways:

1. Over the history of our survey, consumers have preferred buying from footwear retailers, as opposed to buying directly from the brand/store. The share who prefer direct has grown over time, but the data has been mostly consistent/unchanged over the past few years. Younger respondents, and more frequent footwear purchasers are more likely to prefer going direct to the brand. We observe a very similar trend with preferences related to buying online vs. in-stores.
2. Footwear purchase recency in our survey has softened over the past few quarterly waves (a reduced percentage of consumers say they bought a new pair of sneakers in the past three months).
3. A similar trends shows up in footwear purchase frequency – ie, the share of consumers who buy more than one pair per year has pulled back a touch from near series highs set in February of 2023. We would note that purchase frequency is still above pre-pandemic levels.
4. The report contains a battery of questions for specific footwear brands, including: Nike, Veja, Common Projects, Oncloud, Adidas, New Balance, Skechers, Hey Dude, Hoka, Converse, Allbirds, Jordan, Under Armour, Golden Goose, Vans, and Uggs.
5. The report contains a battery of questions for specific footwear retailers, including: Amazon, Foot Locker, Wal-Mart, Dick's, Finish Line, Goat, Target, StockX, Champs, etc.
6. Over time, consumers have increasingly said they wear athletic clothing for both casual wear and for exercise. Nike and Adidas have grown in popularity over the history of our survey.
7. Consumers have increasingly viewed Nike as superior to competition. The same is true of Lululemon, and more recently, of Adidas.

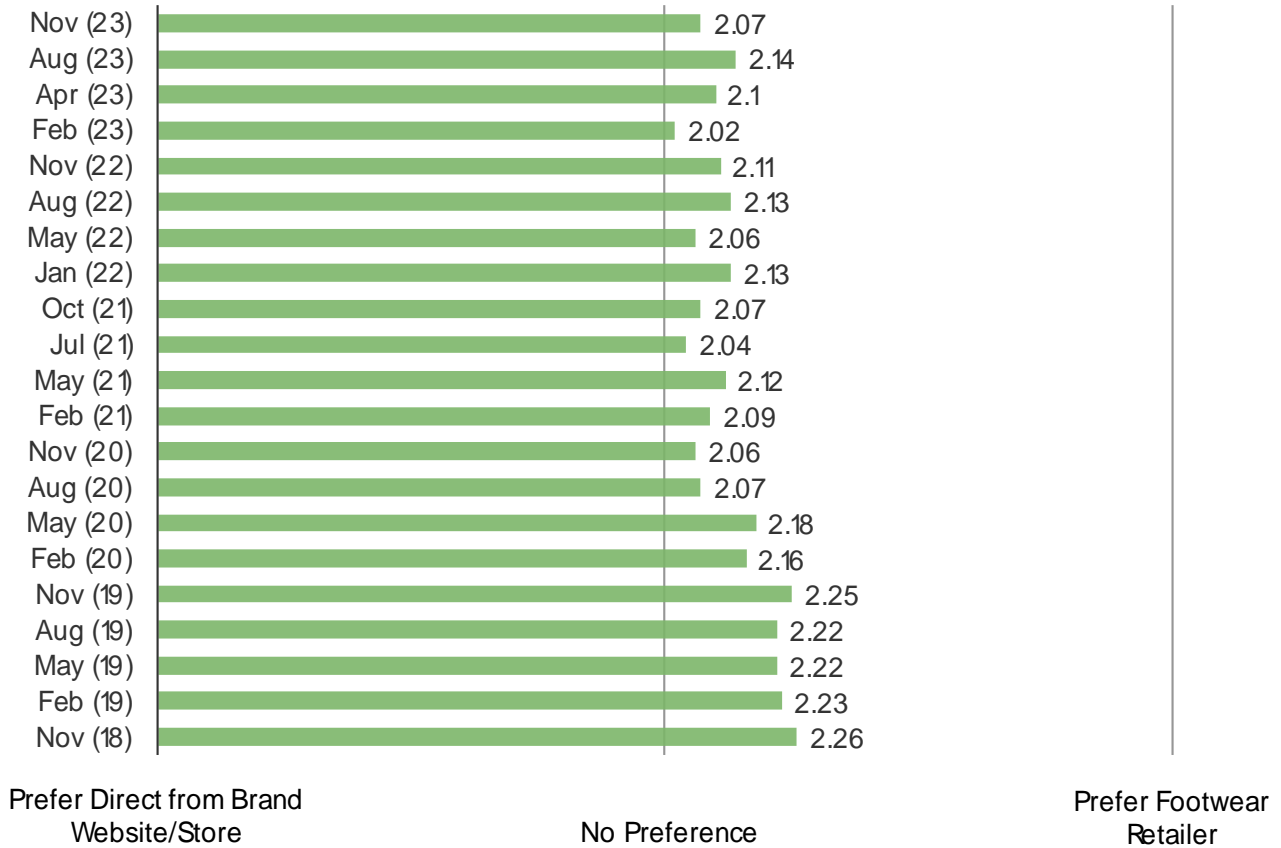
Noteworthy Stats:

- 15.8%** Of respondents said they bought a new pair of sneakers in the past month.
- 35.6%** Of respondents said they buy more than one pair of sneakers per year.
- 34.1%** Of respondents said they made their most recent footwear purchase online.

FOOTWEAR PURCHASE PREFERENCES

WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

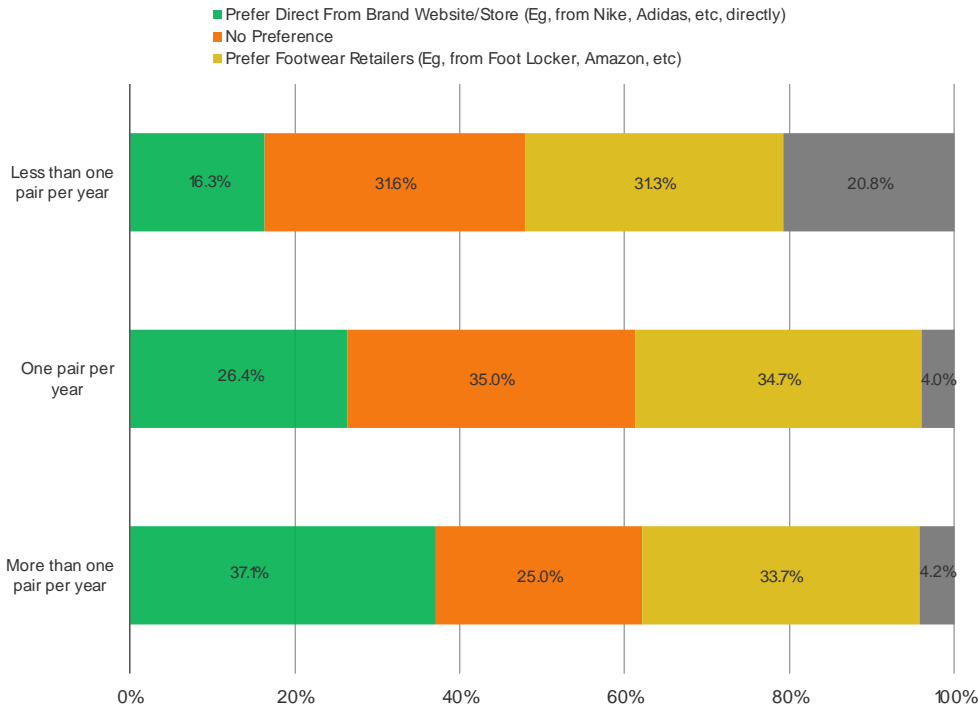
Posed to all respondents



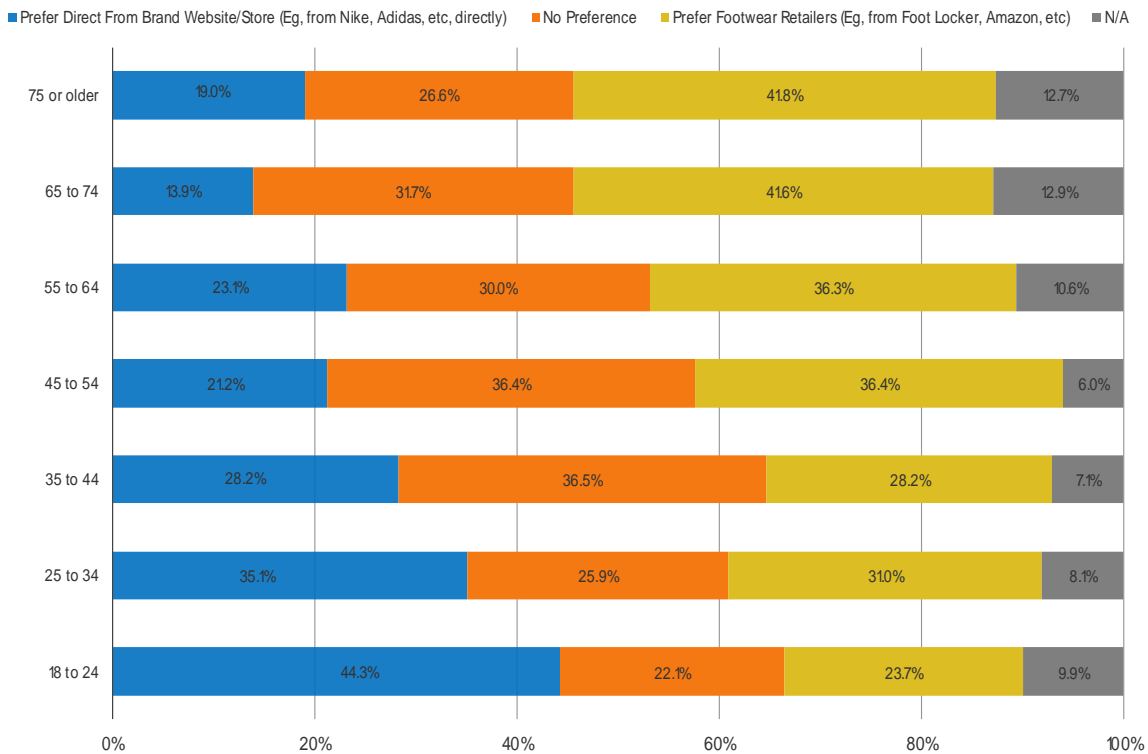
WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

Cross-Tab Analysis

By How Often Consumers Buy Footwear

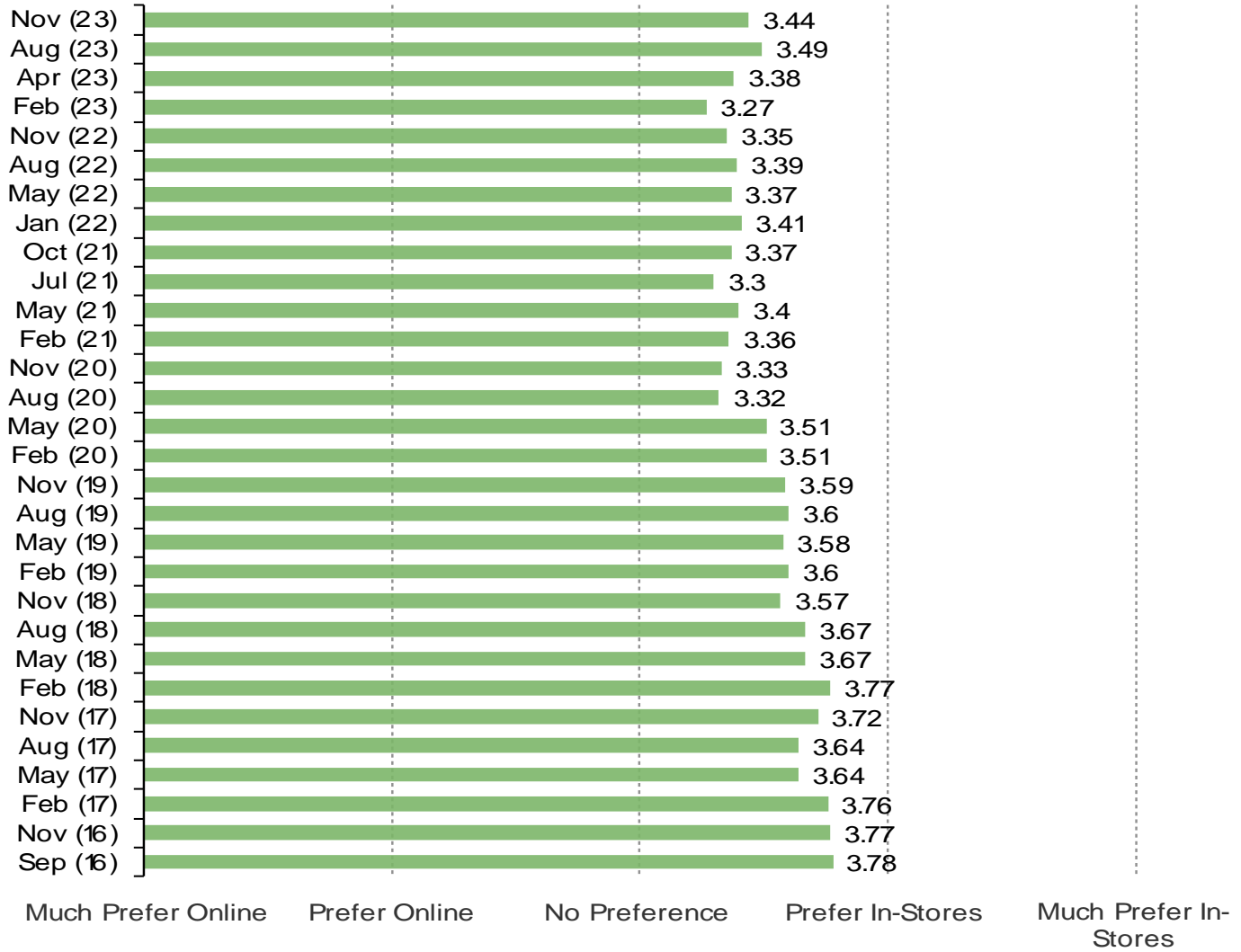


By Age



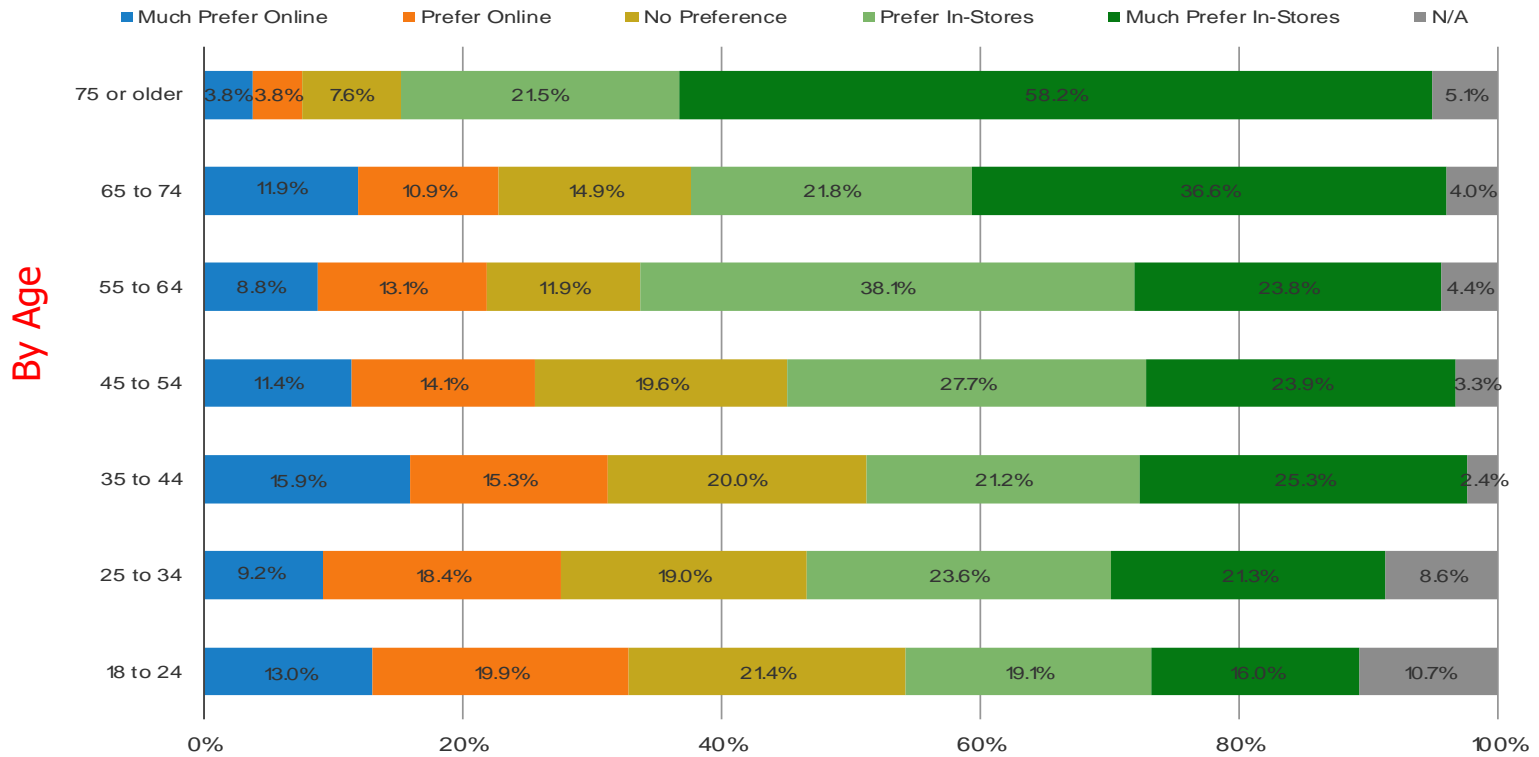
WHERE DO YOU PREFER TO BUY SNEAKERS?

Posed to all respondents



WHERE DO YOU PREFER TO BUY SNEAKERS?

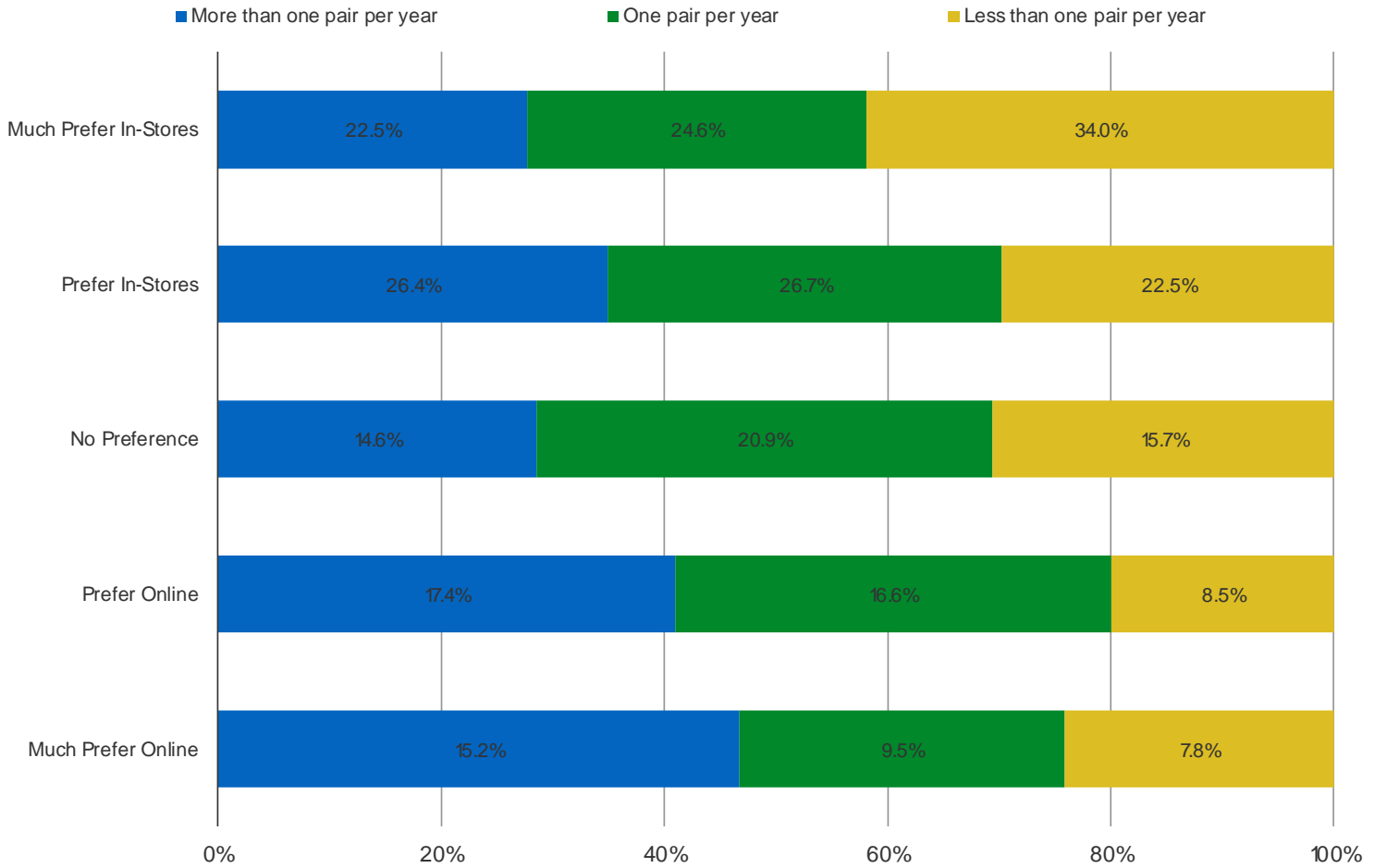
Cross-Tab Analysis



HOW MANY PAIRS OF FOOTWEAR DO YOU BUY PER YEAR?

Cross-Tab Analysis

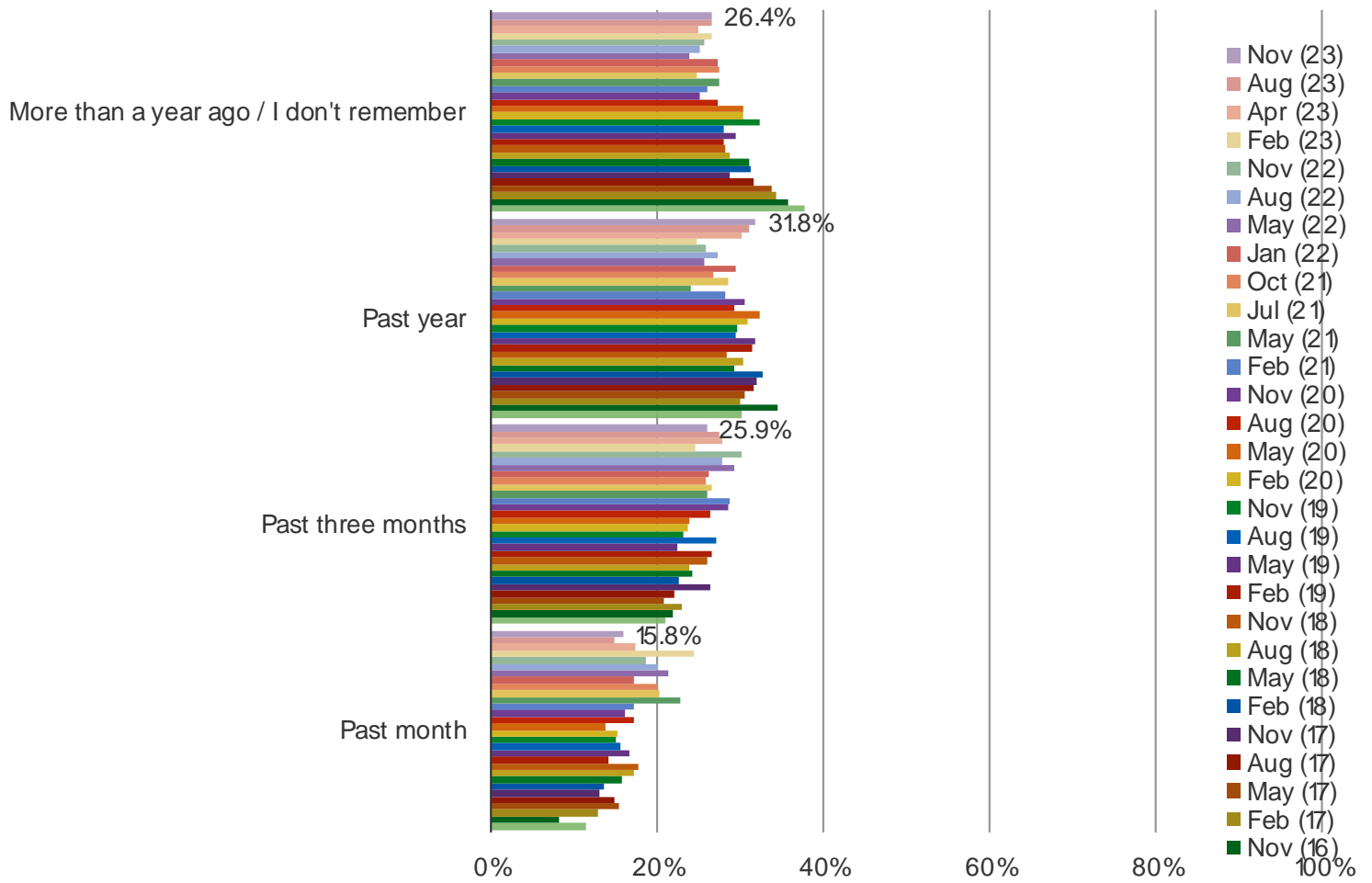
By How Consumers Prefer To Buy Footwear



SNEAKER BUYING TRENDS

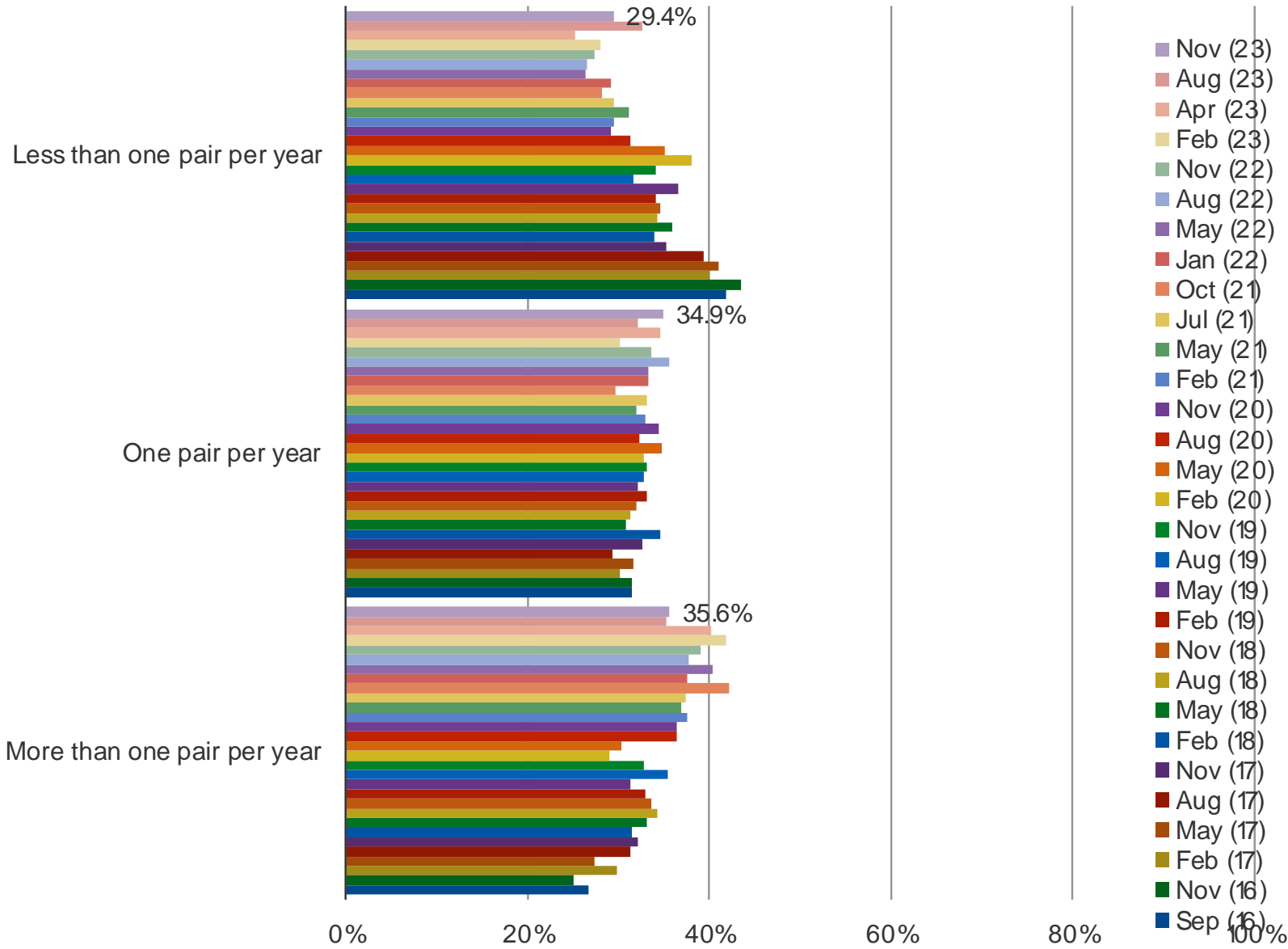
WHEN IS THE LAST TIME YOU BOUGHT A NEW PAIR OF SNEAKERS?

Posed to all respondents



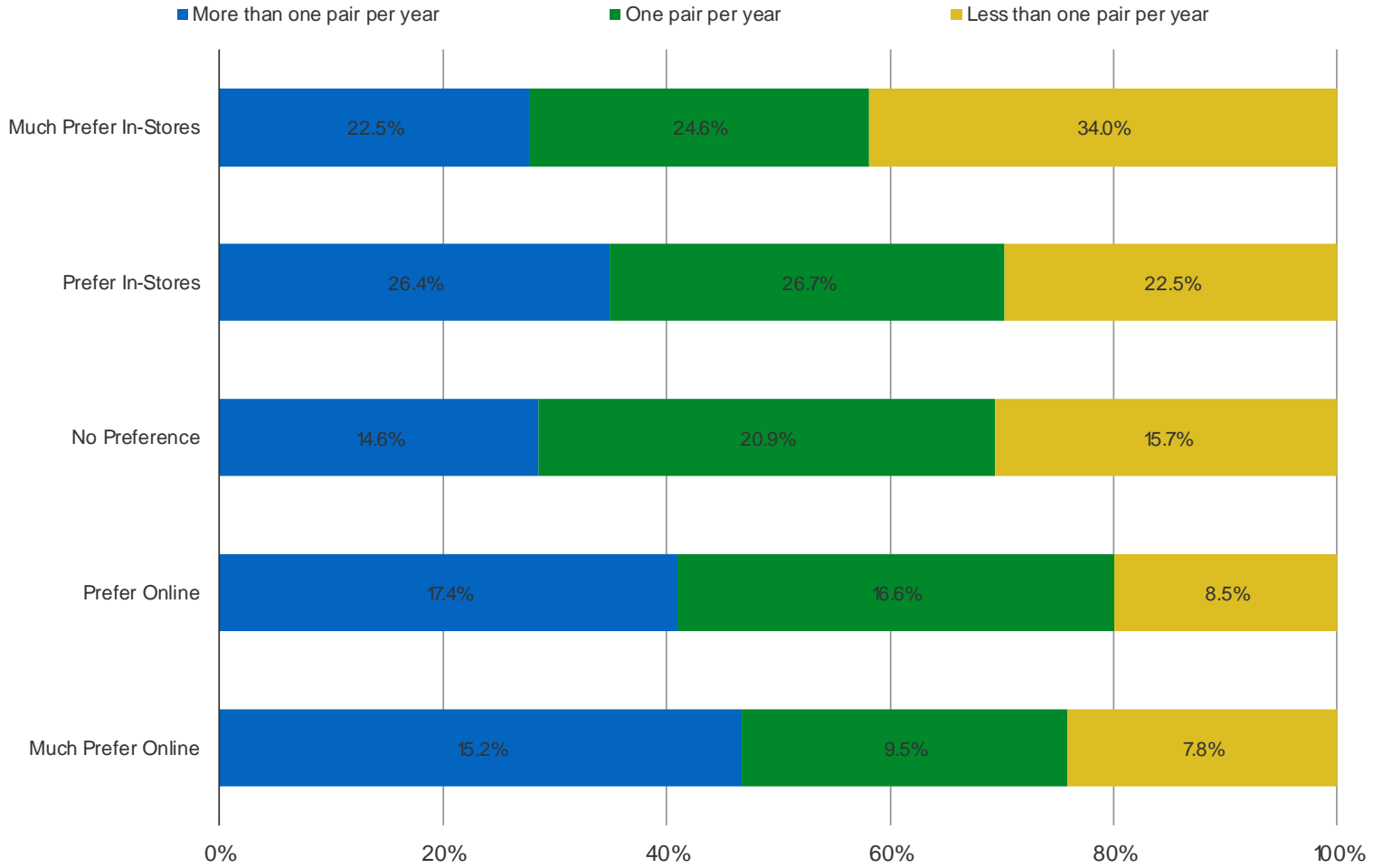
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

Posed to all respondents



HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

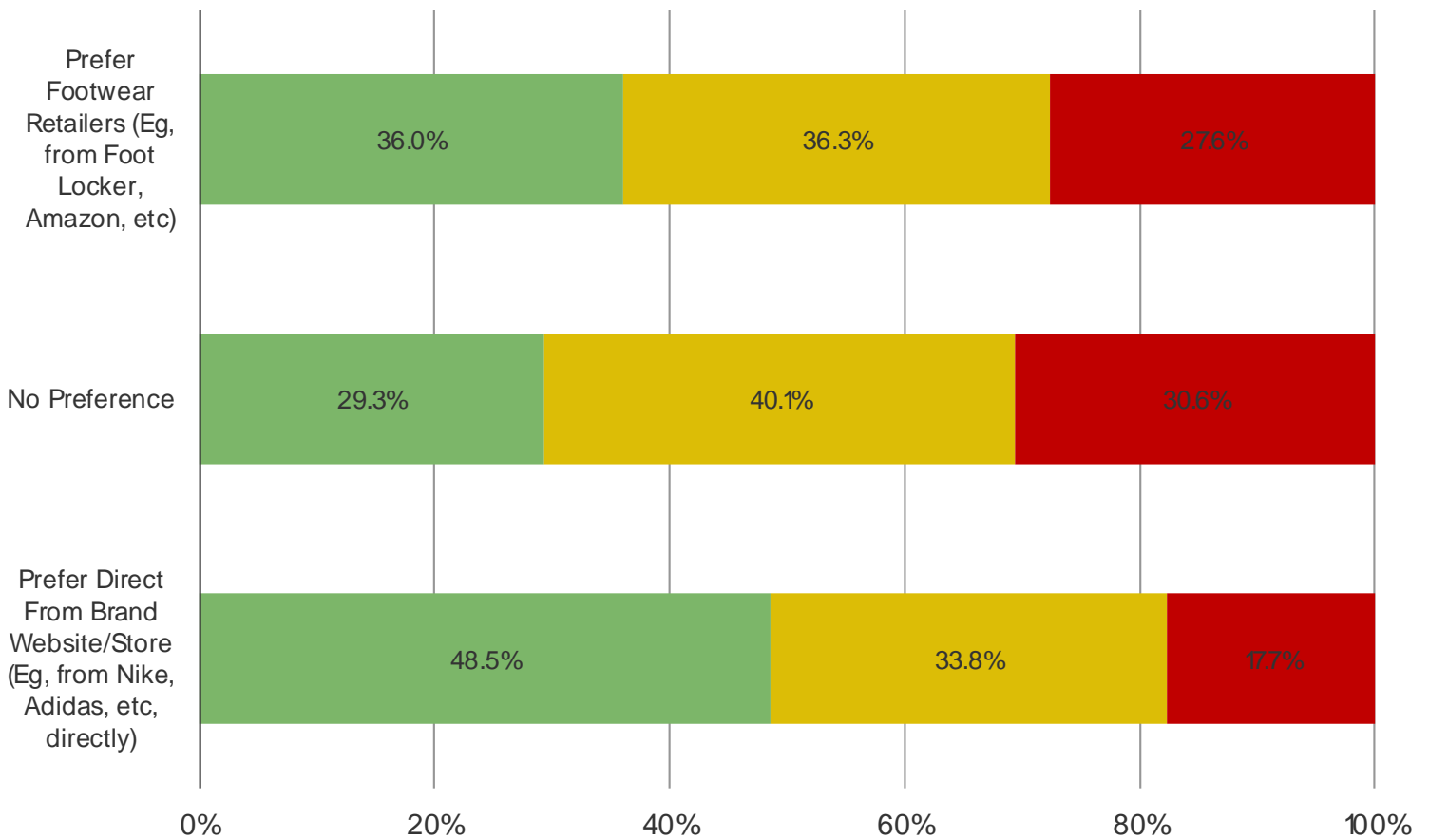
Posed to all respondents – Cross-tabbed by if they prefer to buy online vs. in-stores.



HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

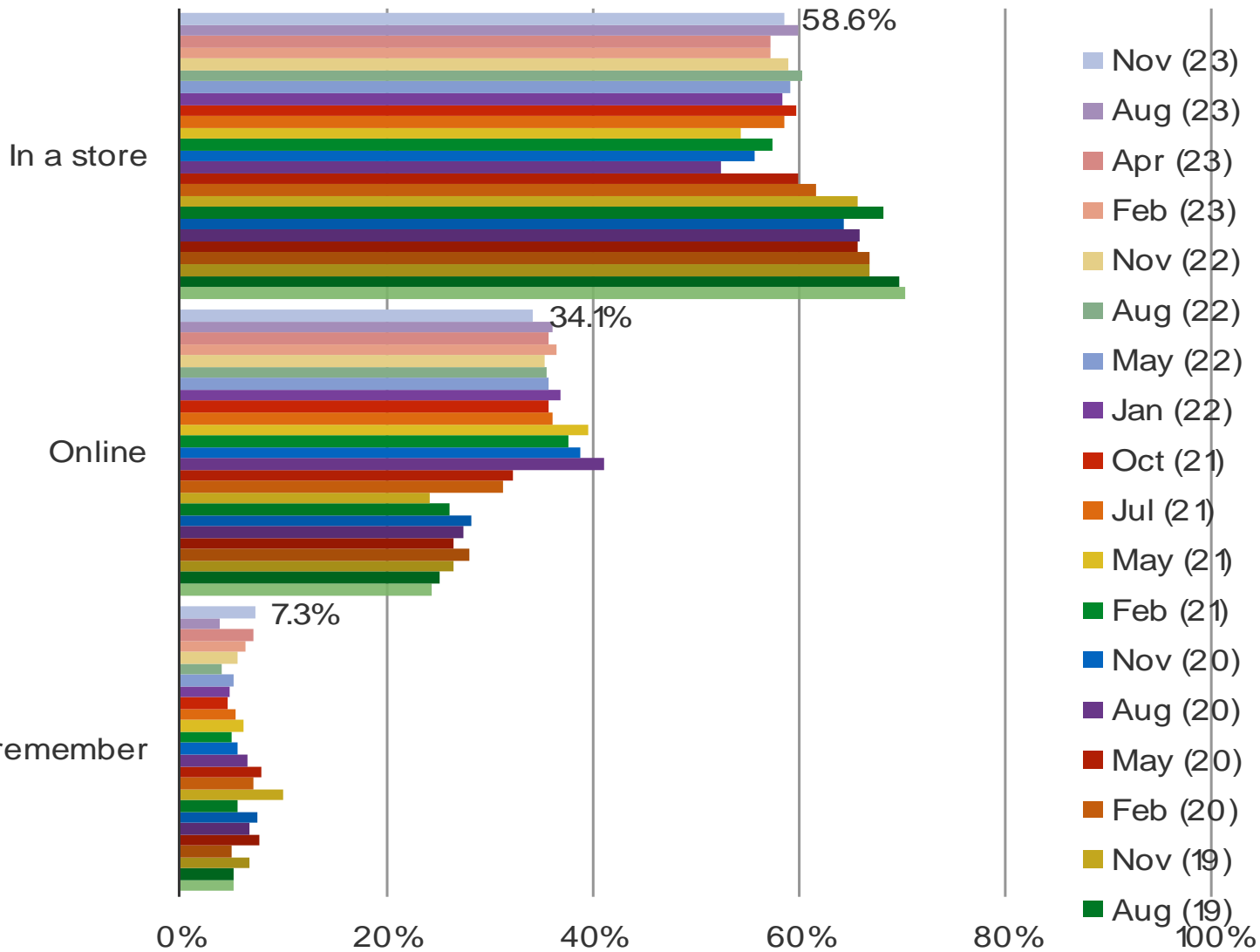
Posed to all respondents – Cross-tabbed by if they prefer to buy direct or from retailers.

■ More than one pair per year ■ One pair per year ■ Less than one pair per year



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

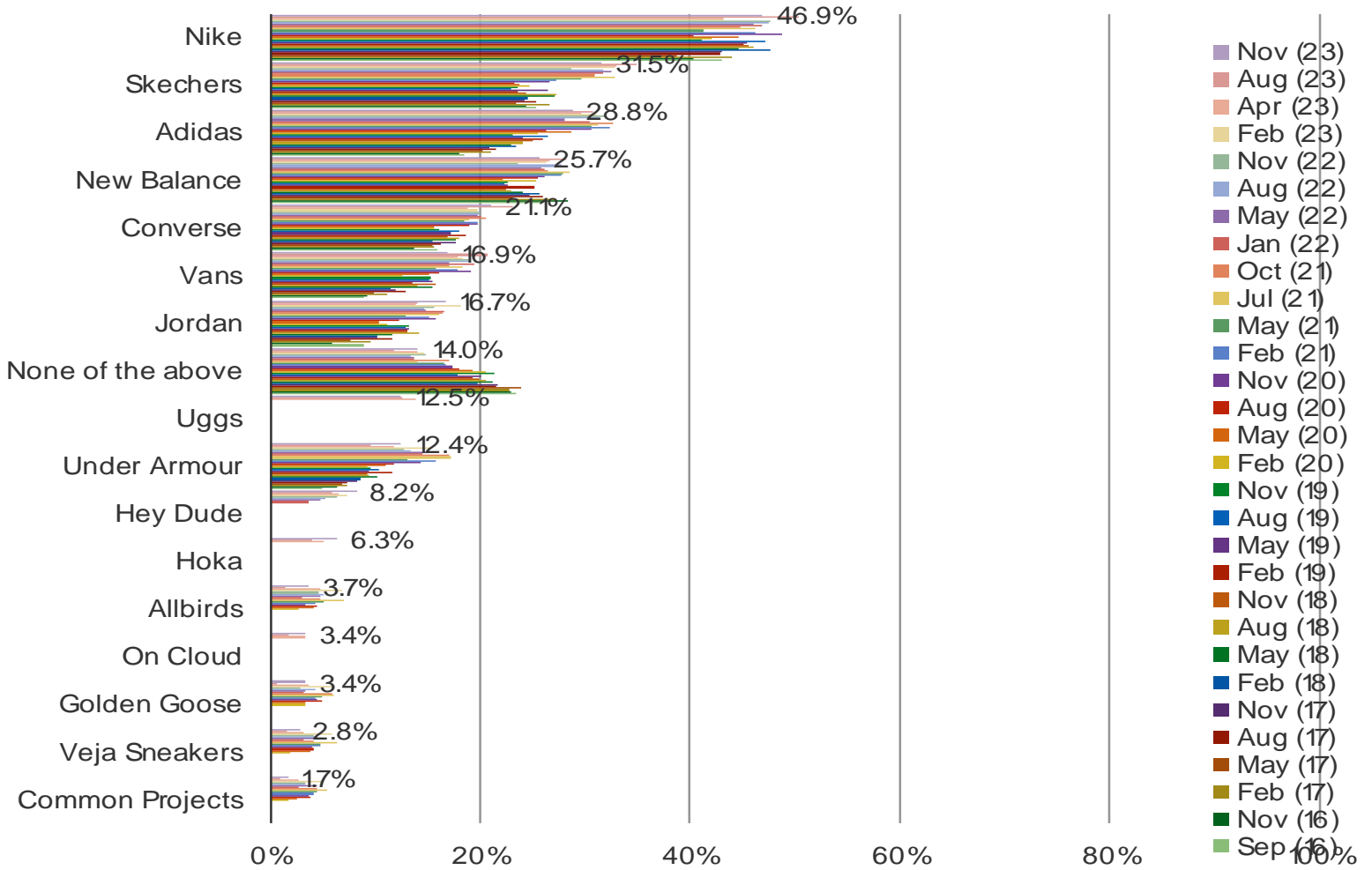
Posed to all respondents



SNEAKER BRANDS

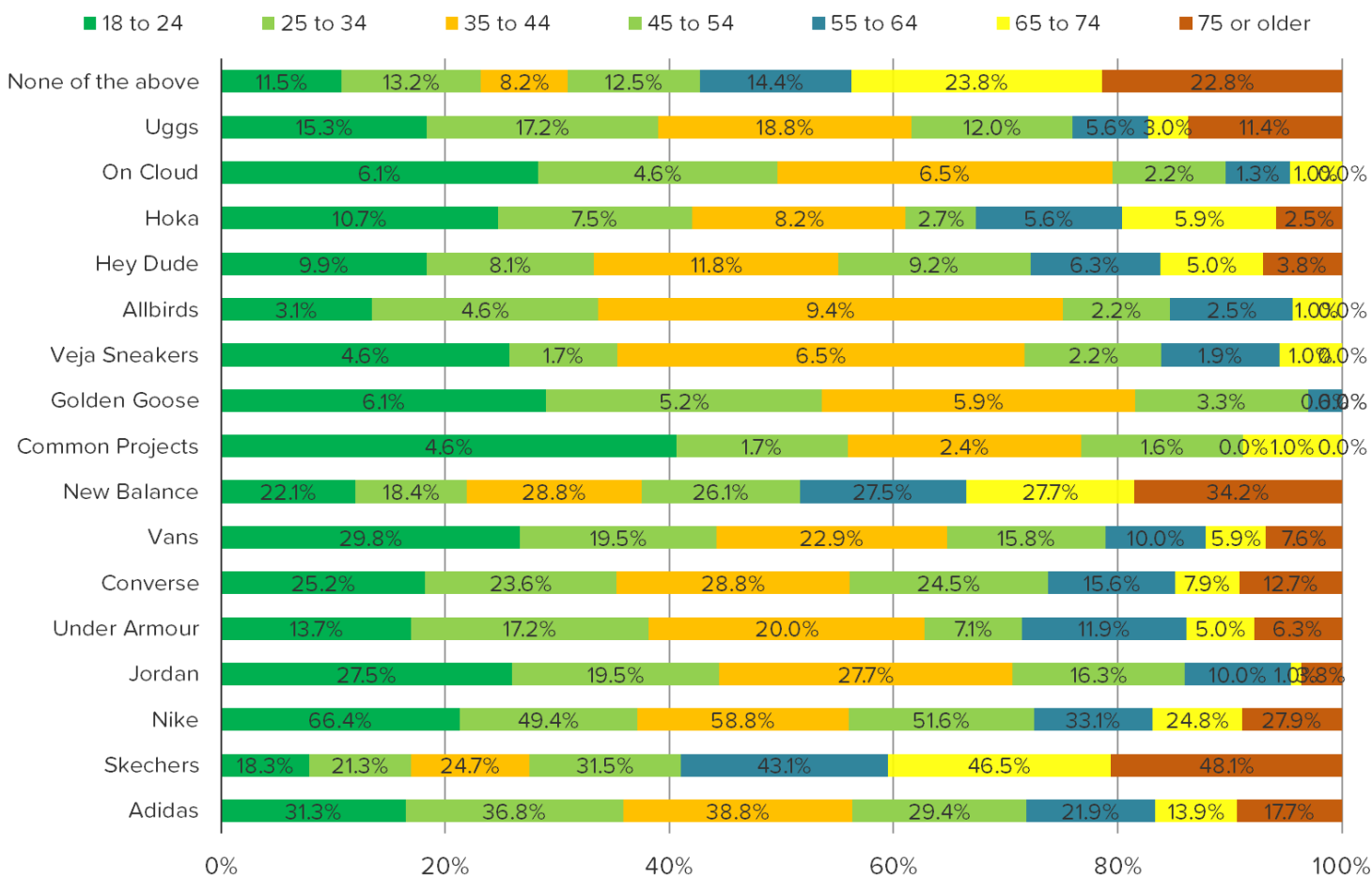
WHICH OF THE FOLLOWING BRANDS DO YOU OWN SNEAKERS FROM?

Posed to all respondents



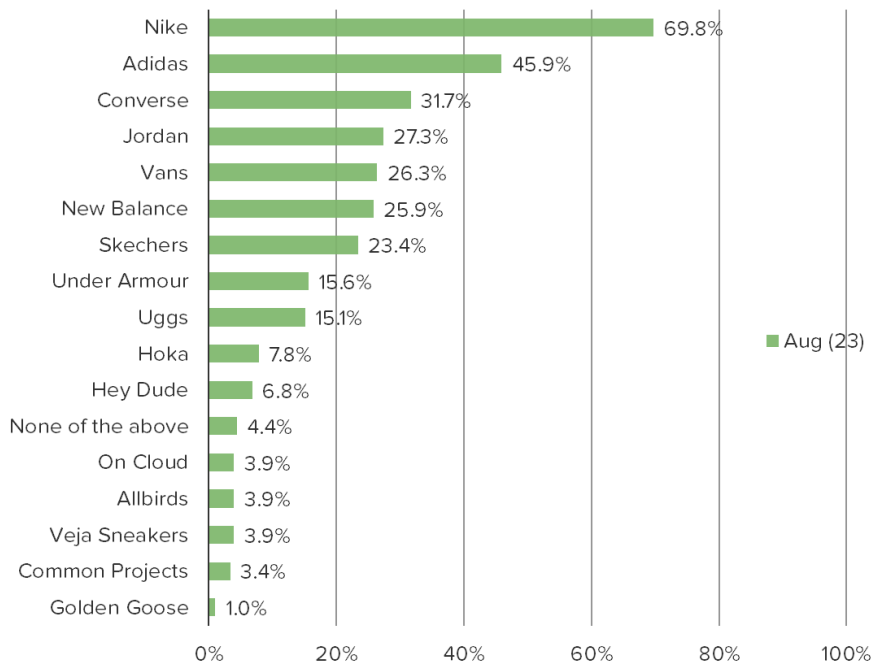
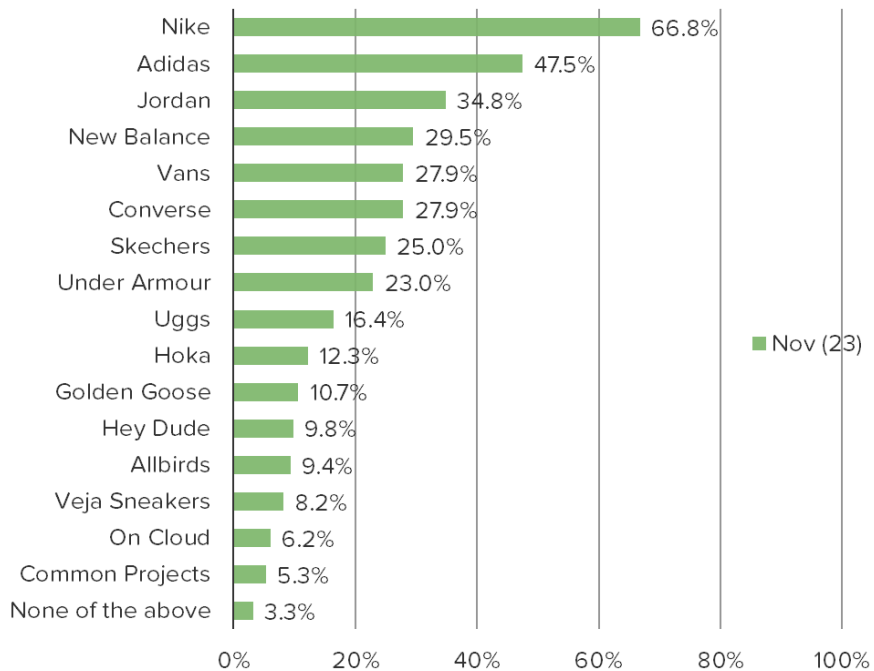
WHICH OF THE FOLLOWING FOOTWEAR BRANDS DO YOU OWN SNEAKERS/FOOTWEAR FROM? (SELECT ALL THAT APPLY)

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



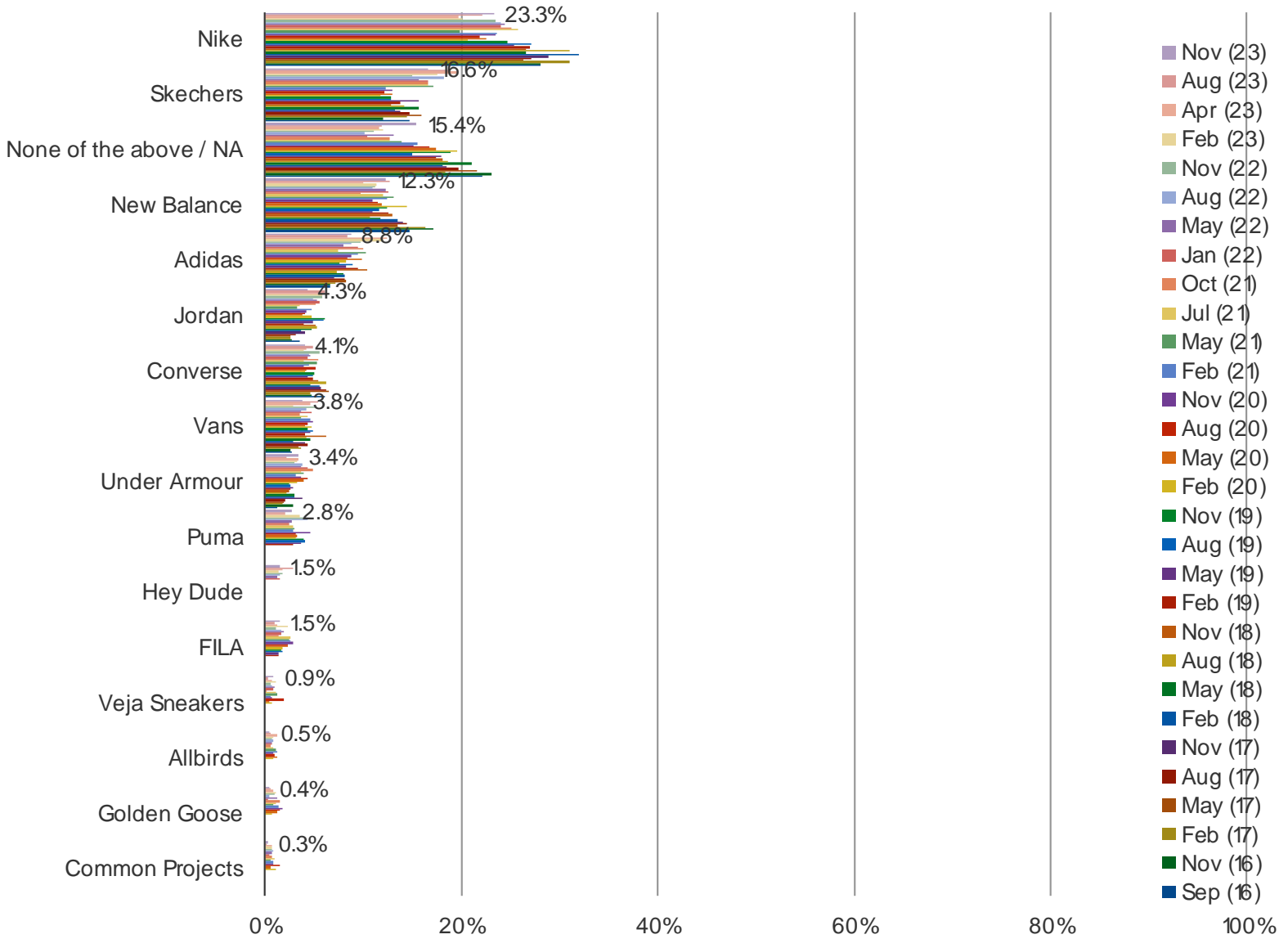
WHICH OF THE FOLLOWING FOOTWEAR BRANDS DO YOU OWN SNEAKERS/FOOTWEAR FROM?

Posed to respondents who said they run for exercise frequently or very frequently (N = 244)



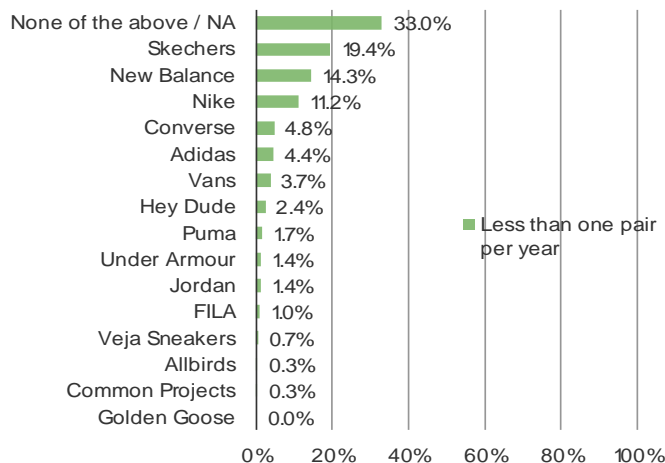
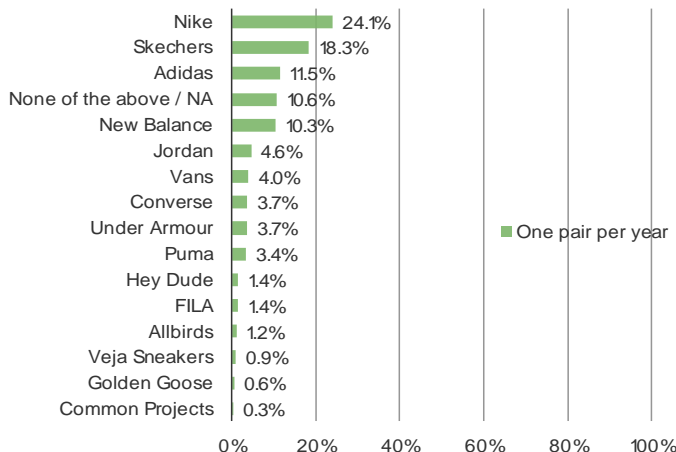
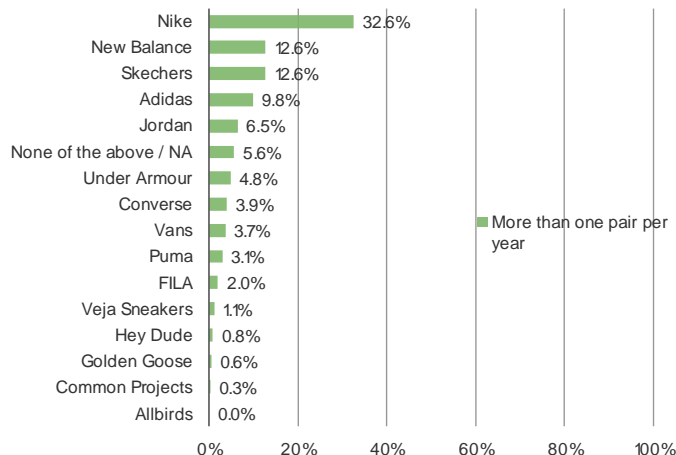
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

Posed to all respondents



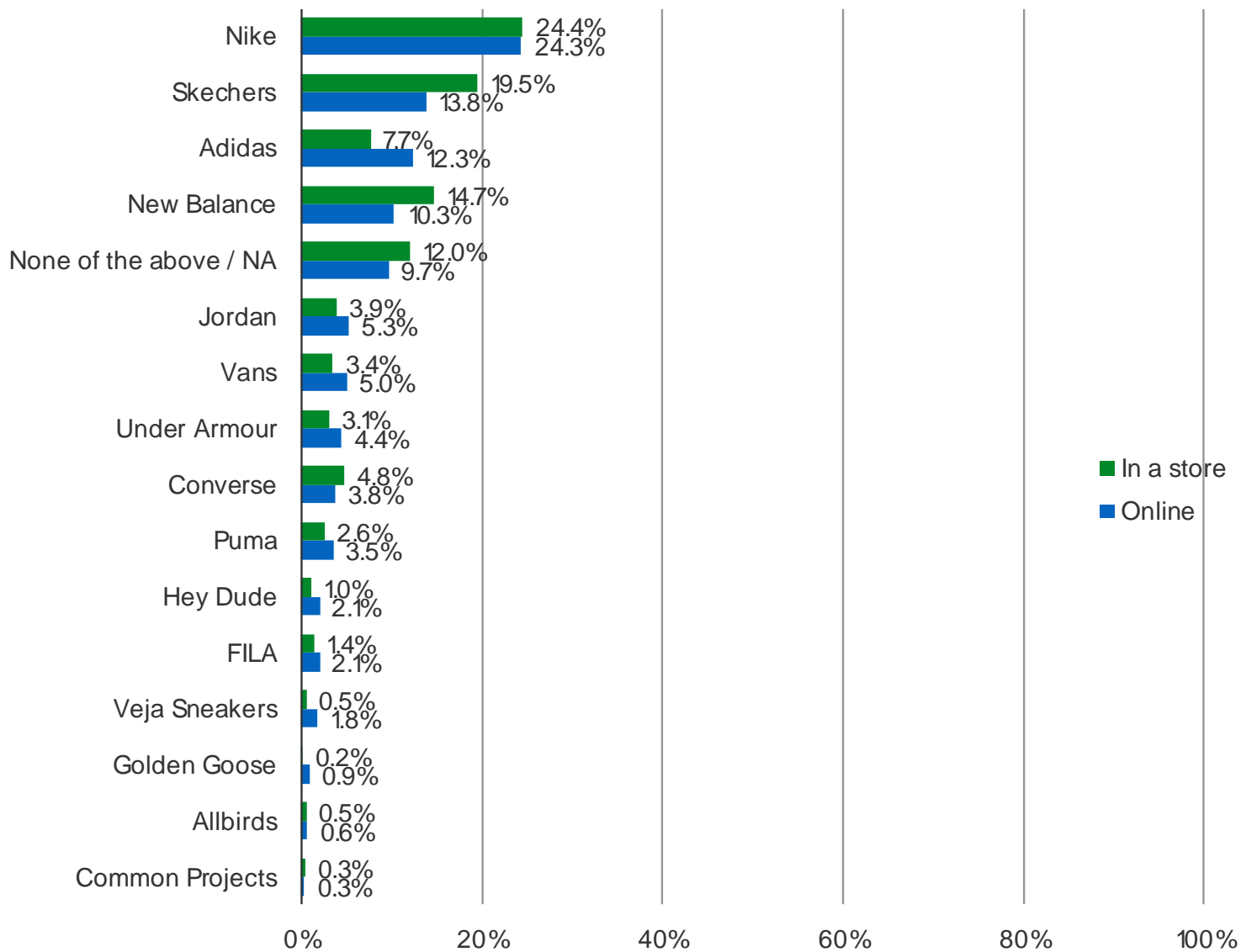
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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



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

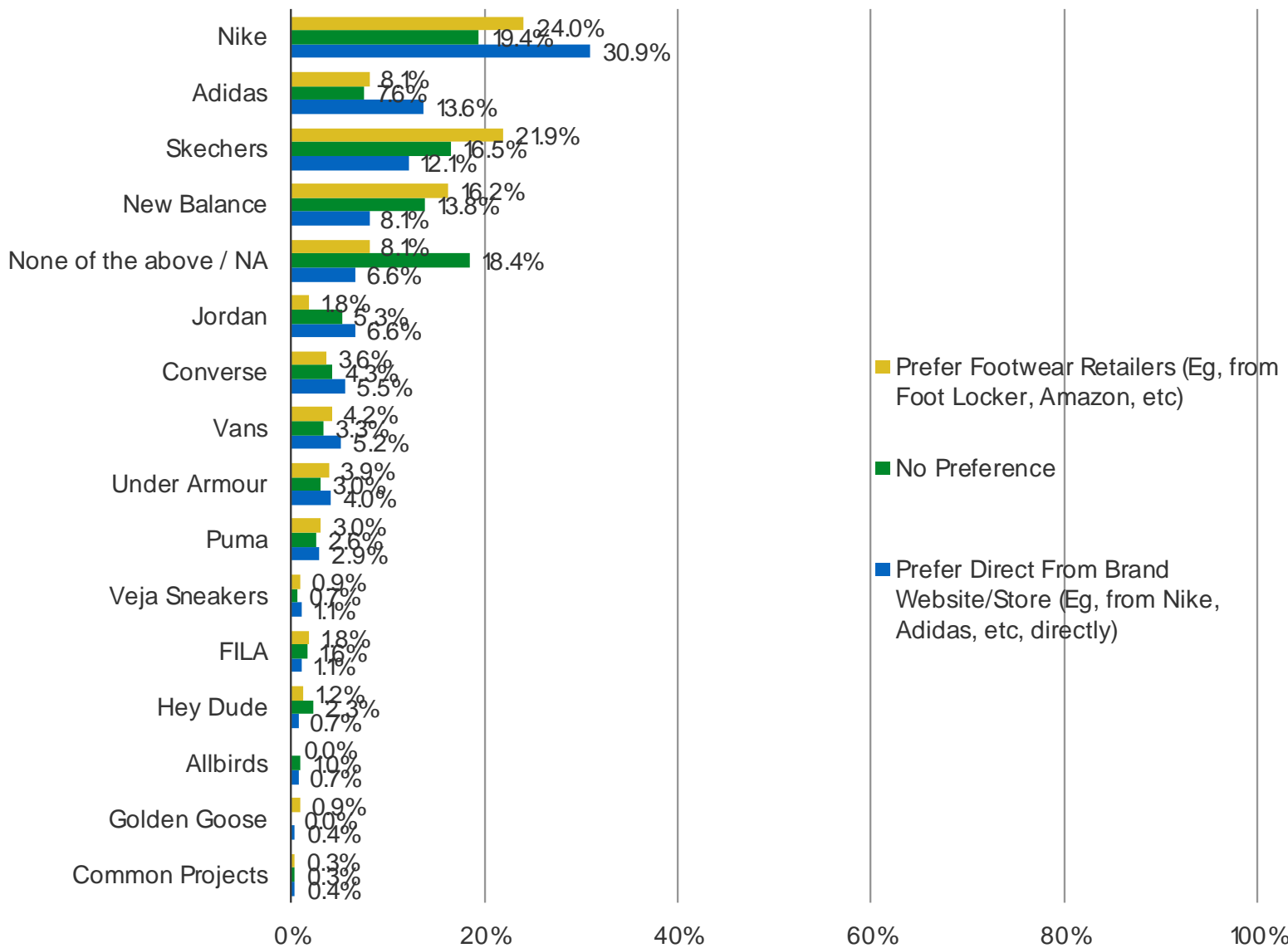
Posed to all respondents – Cross-tabbed by those who prefer to buy online vs. in-stores.



Footwear and Athletic Wear

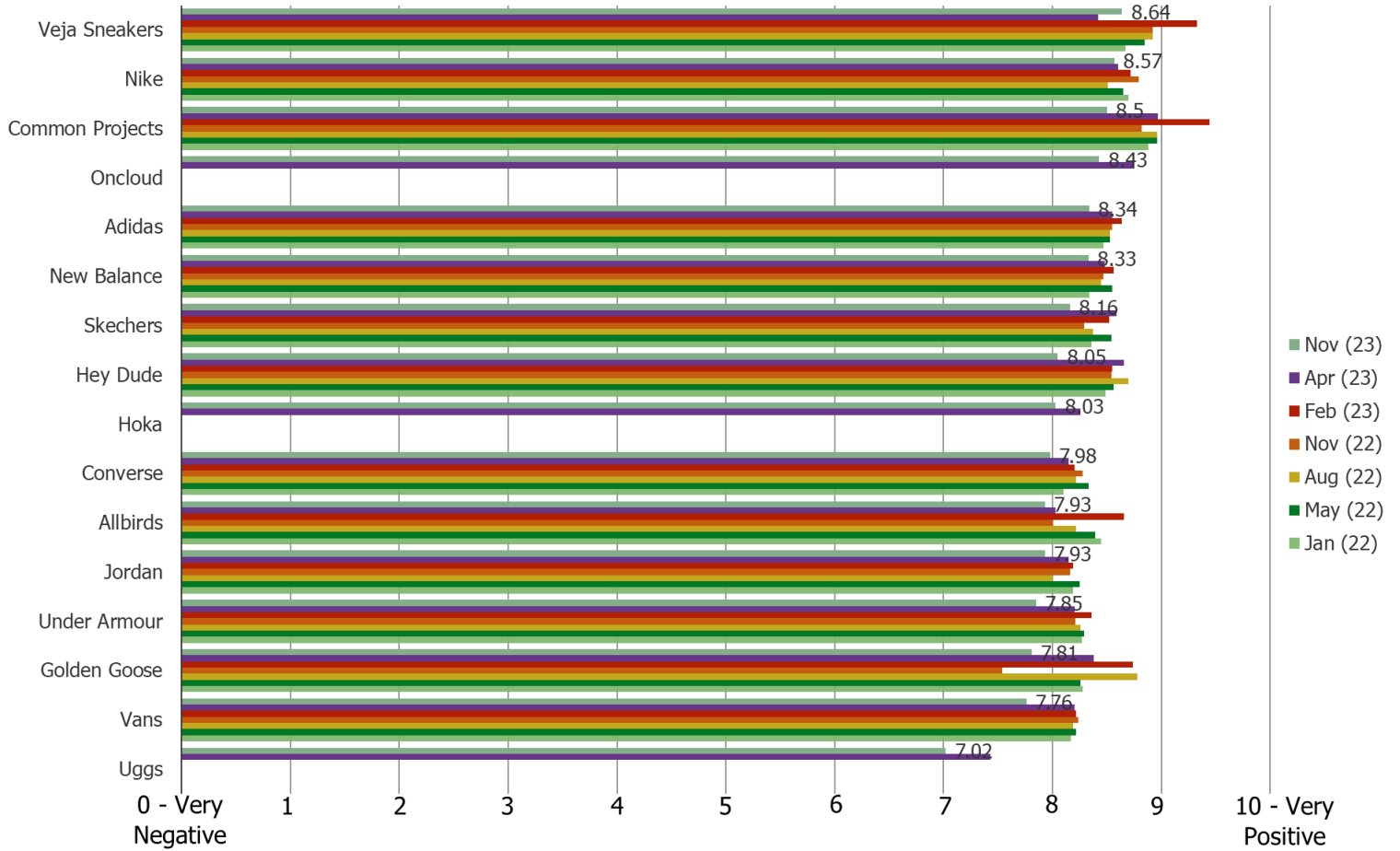
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

Posed to all respondents – Cross-tabbed by those who prefer to buy 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

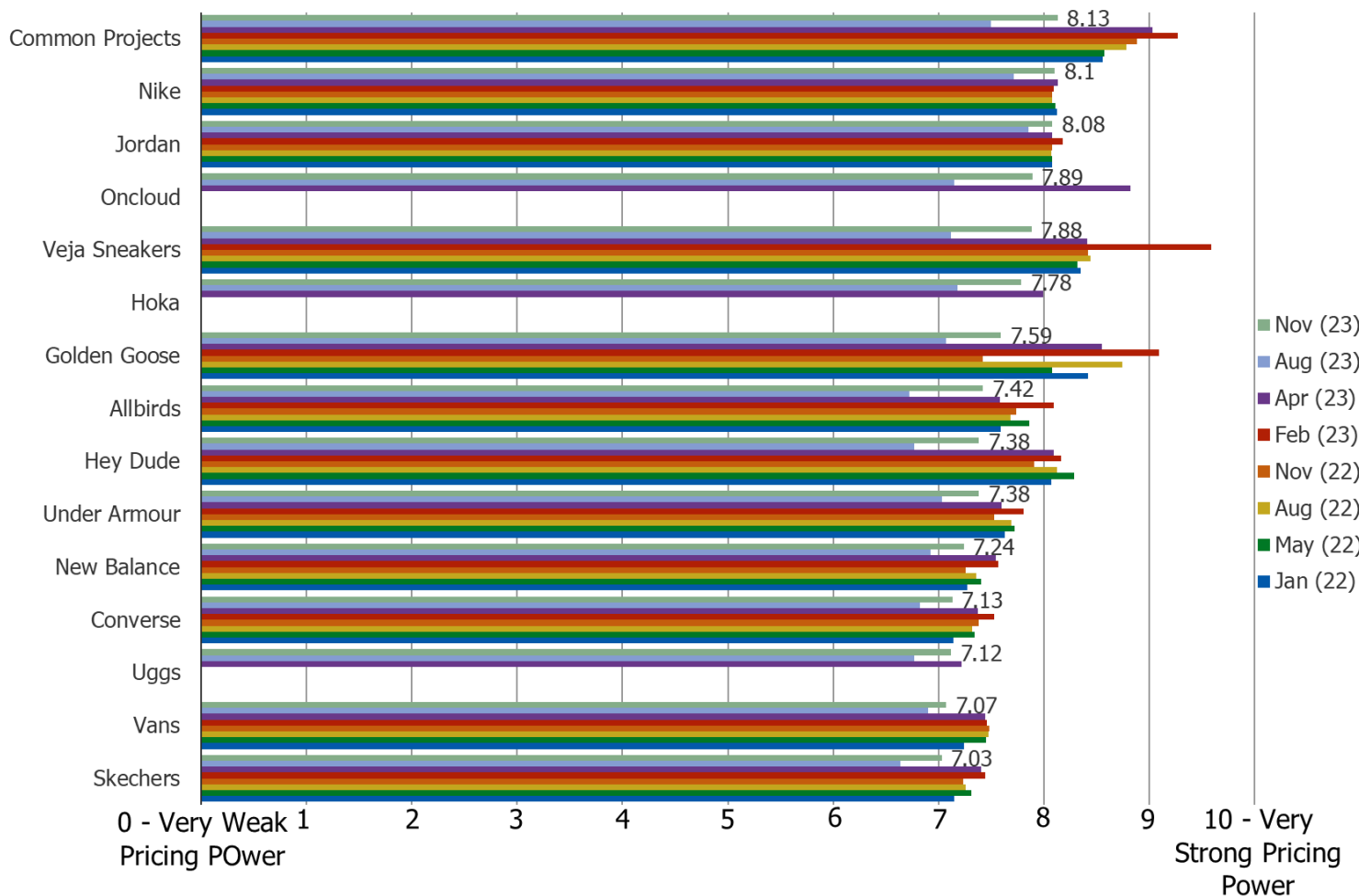
1 = Very Negative

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

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

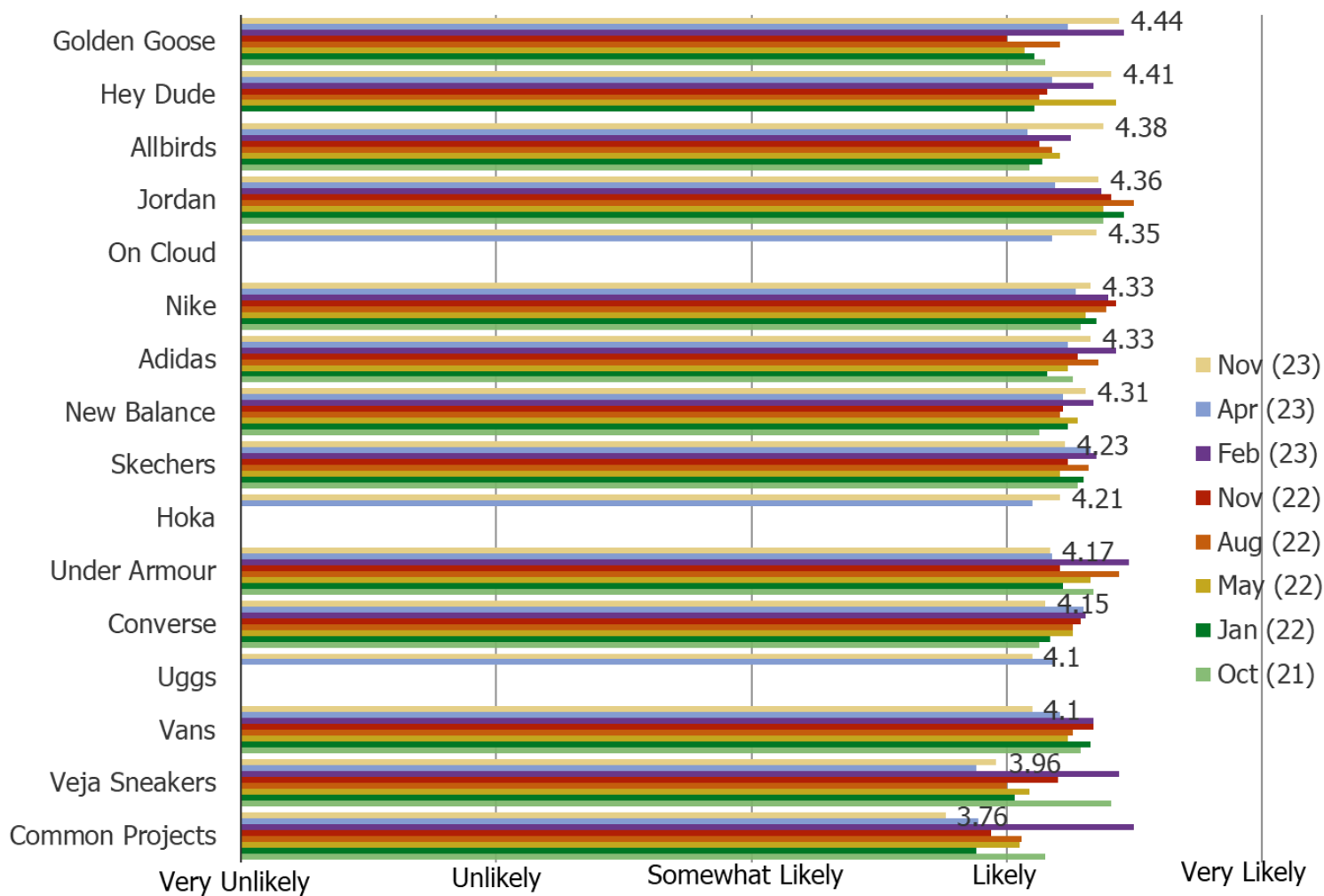
1 = Very Weak Pricing Power

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?

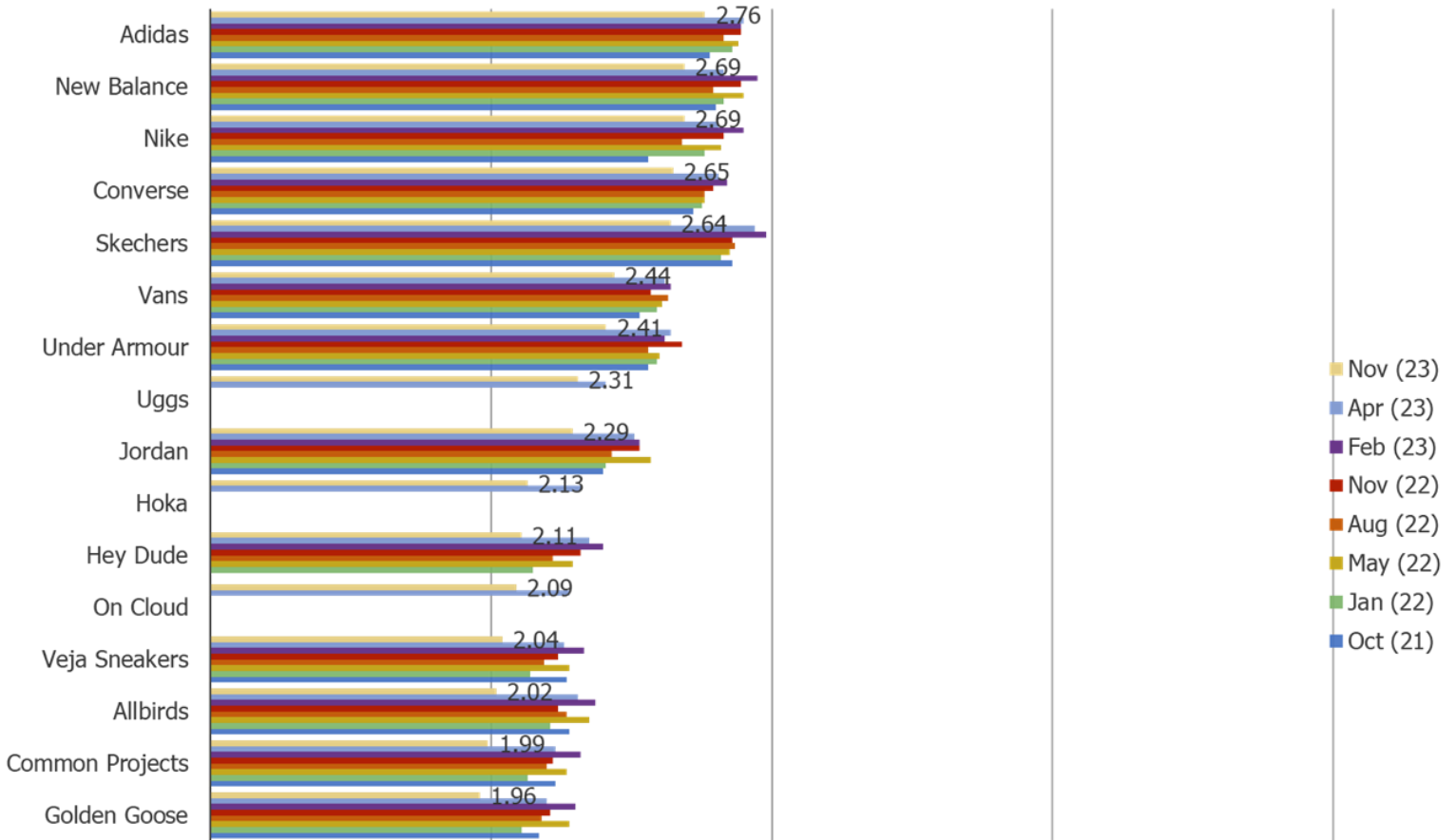
Posed to respondents who own footwear from each of the following.



	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.



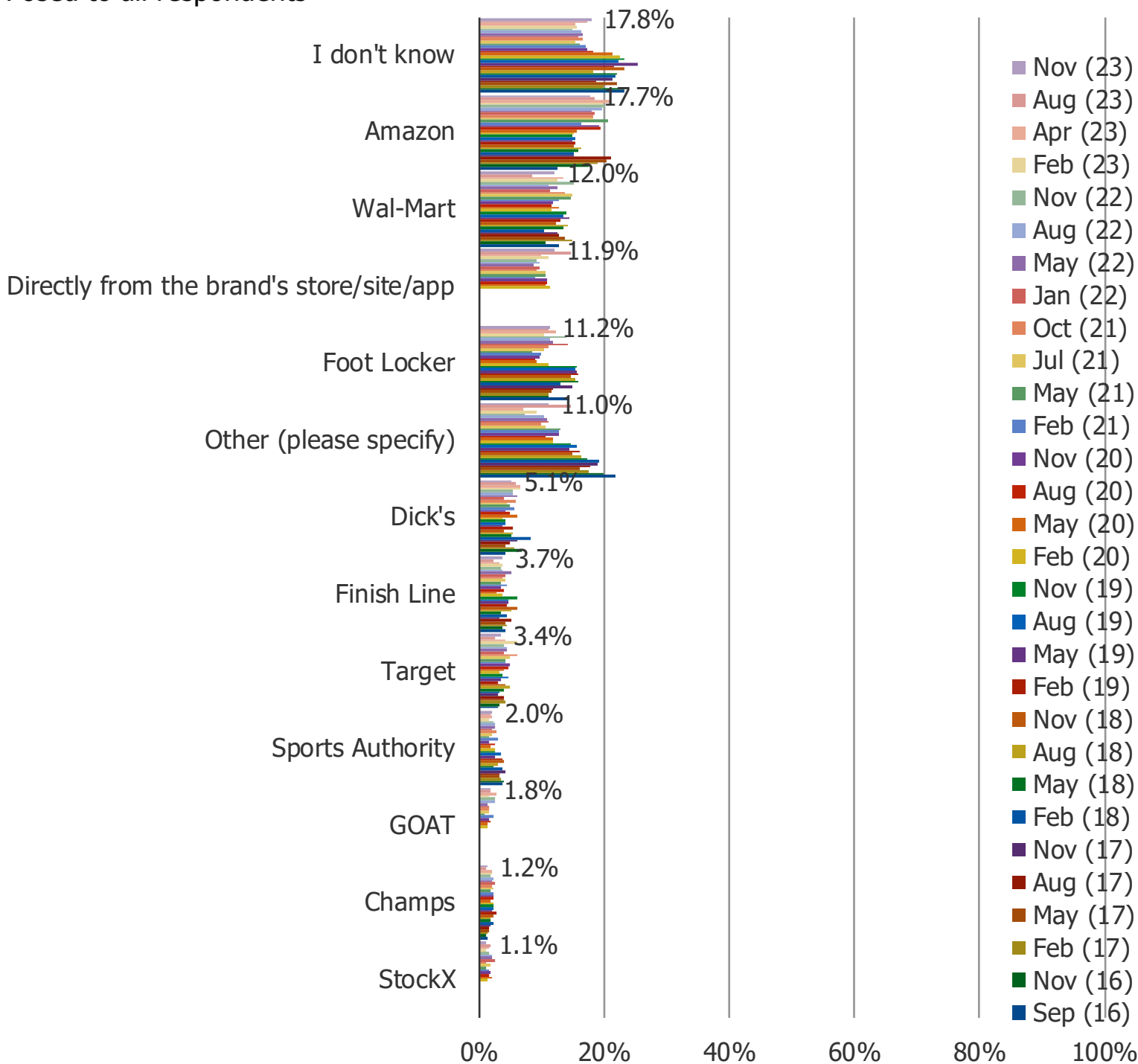
Very Unlikely Unlikely Somewhat Likely Likely Very Likely

	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

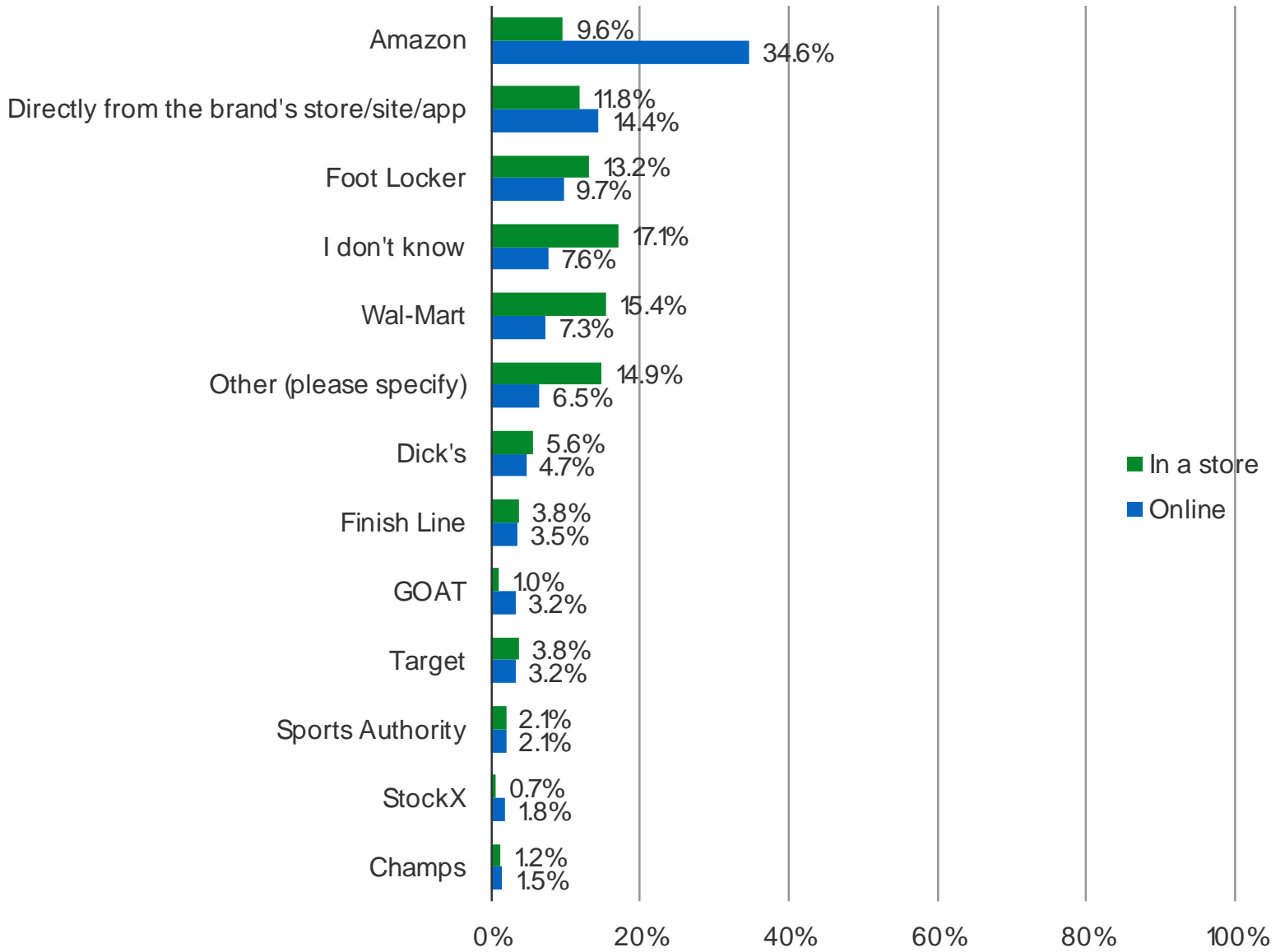
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

Posed to all respondents



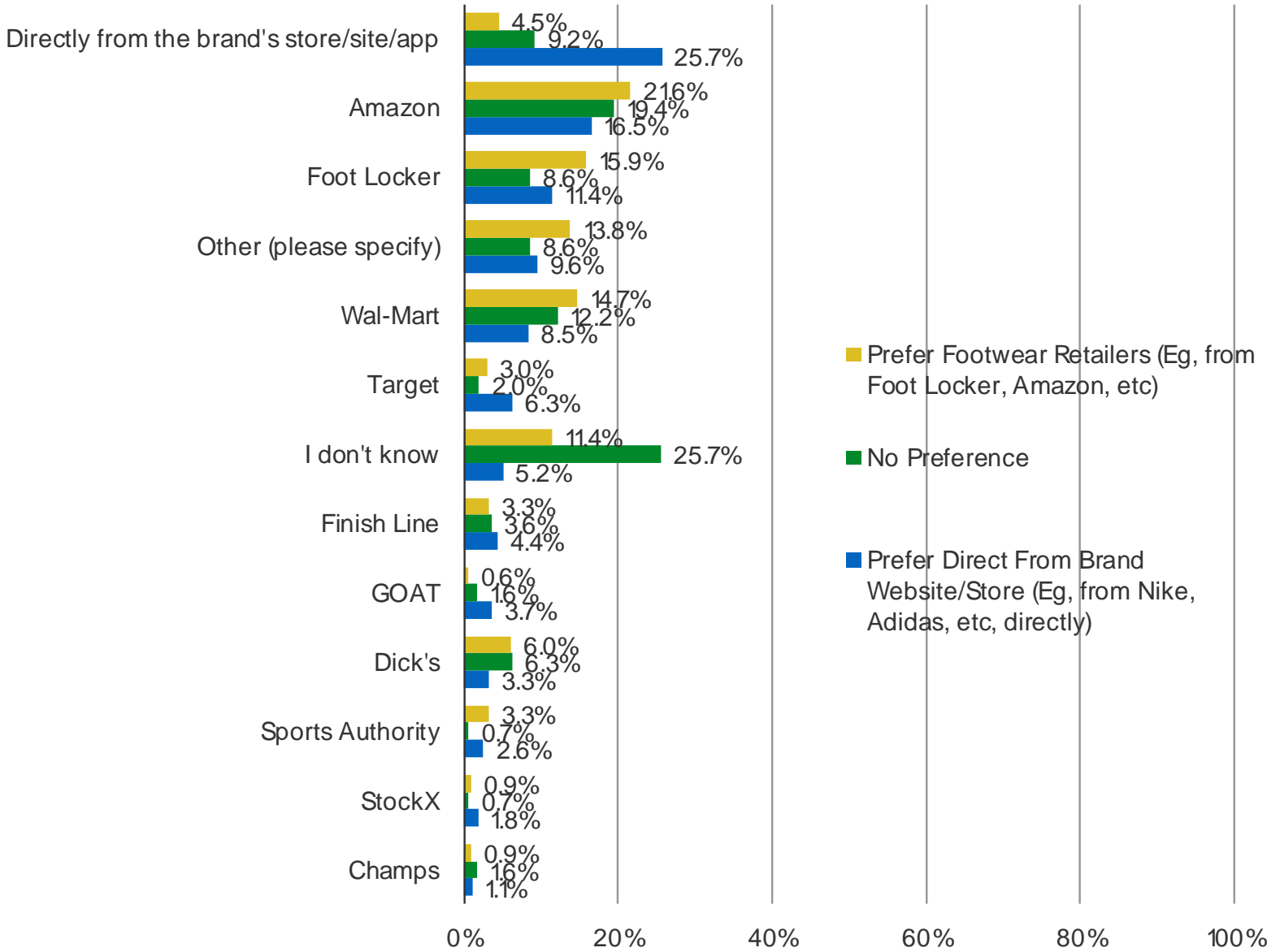
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



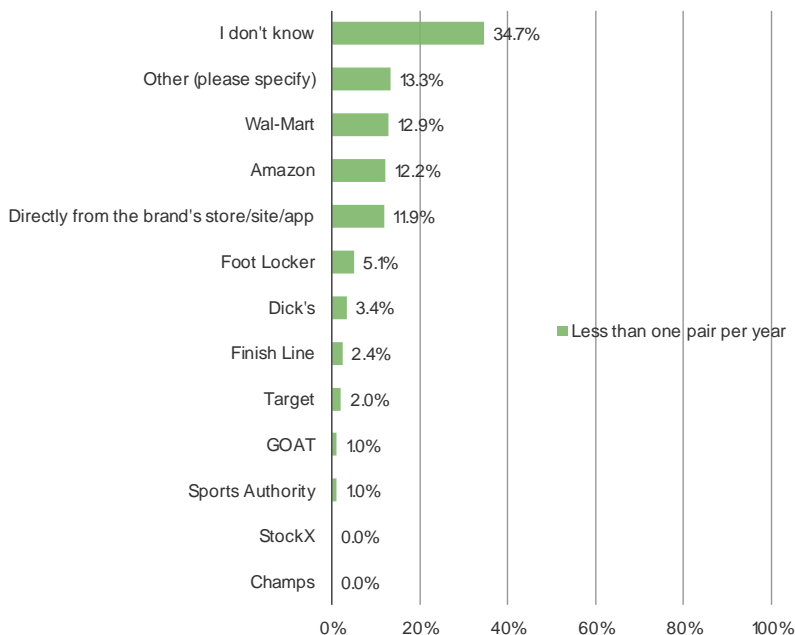
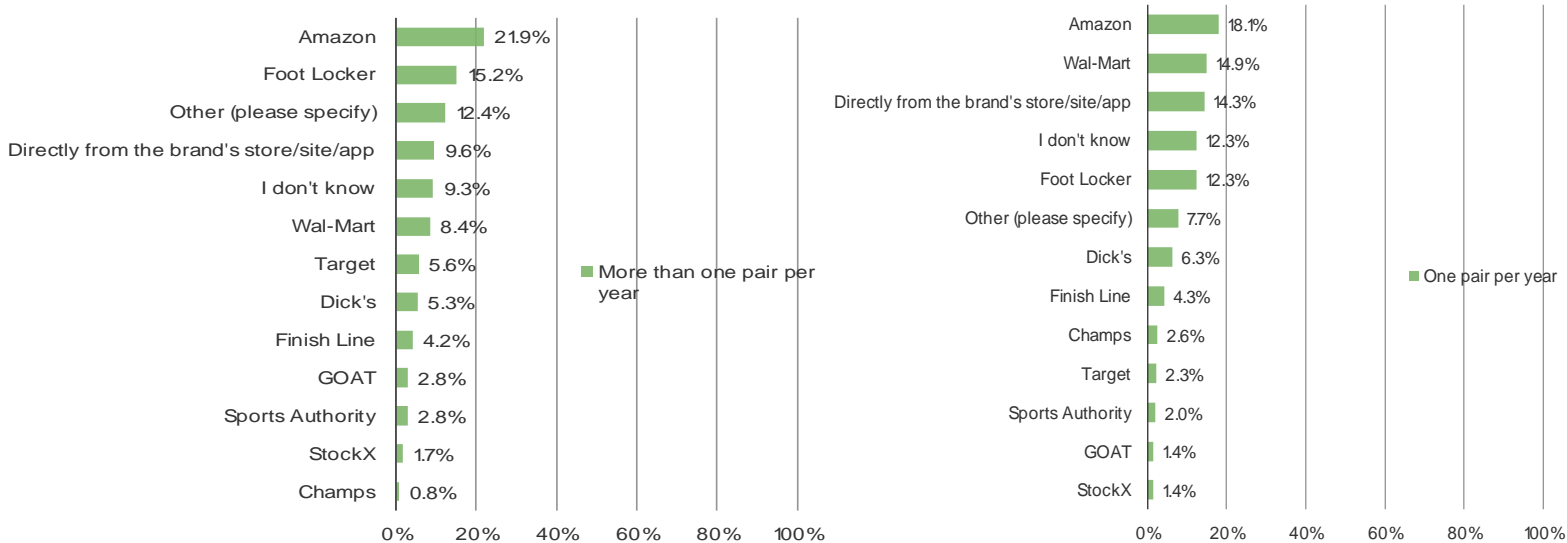
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



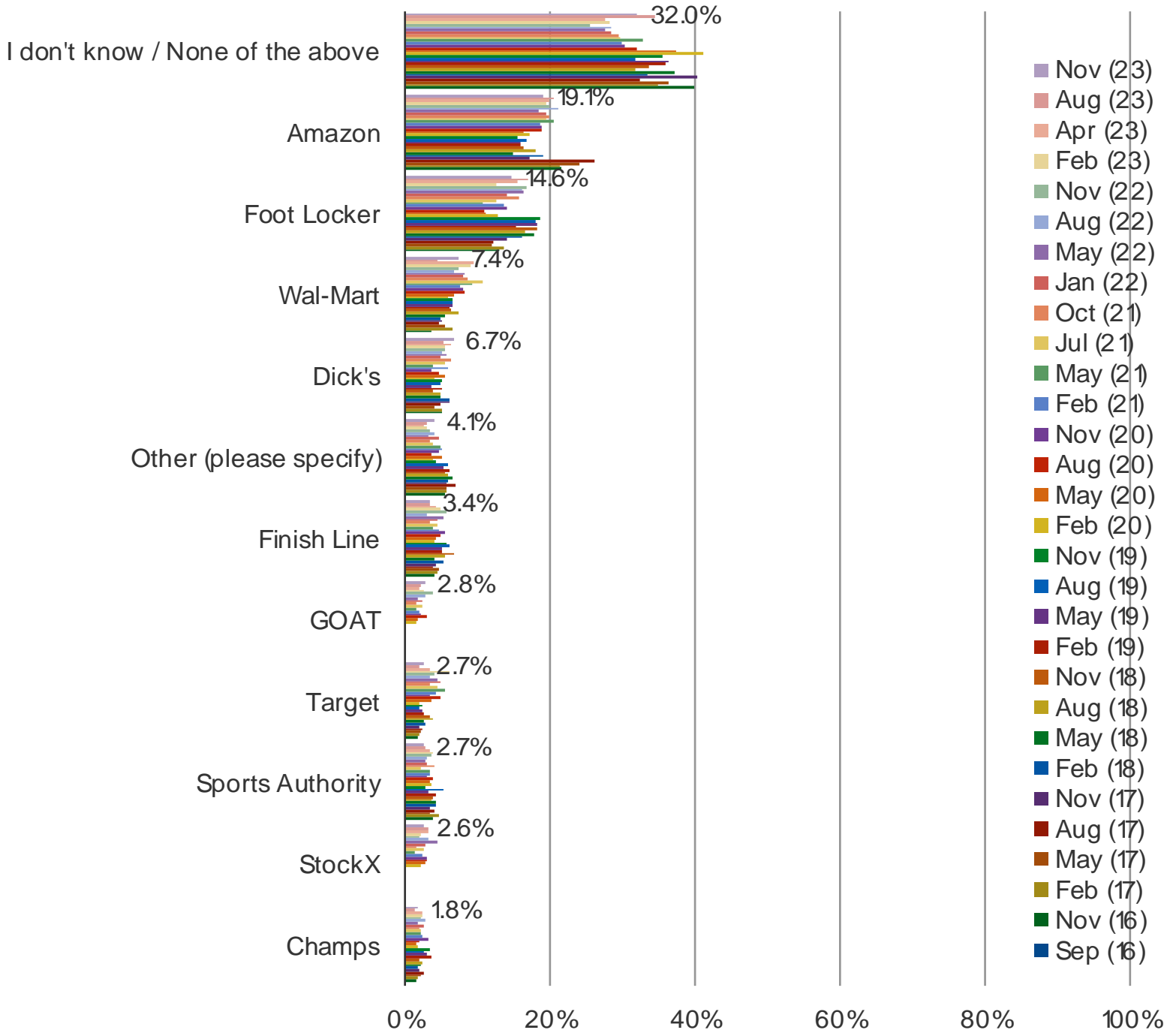
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



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

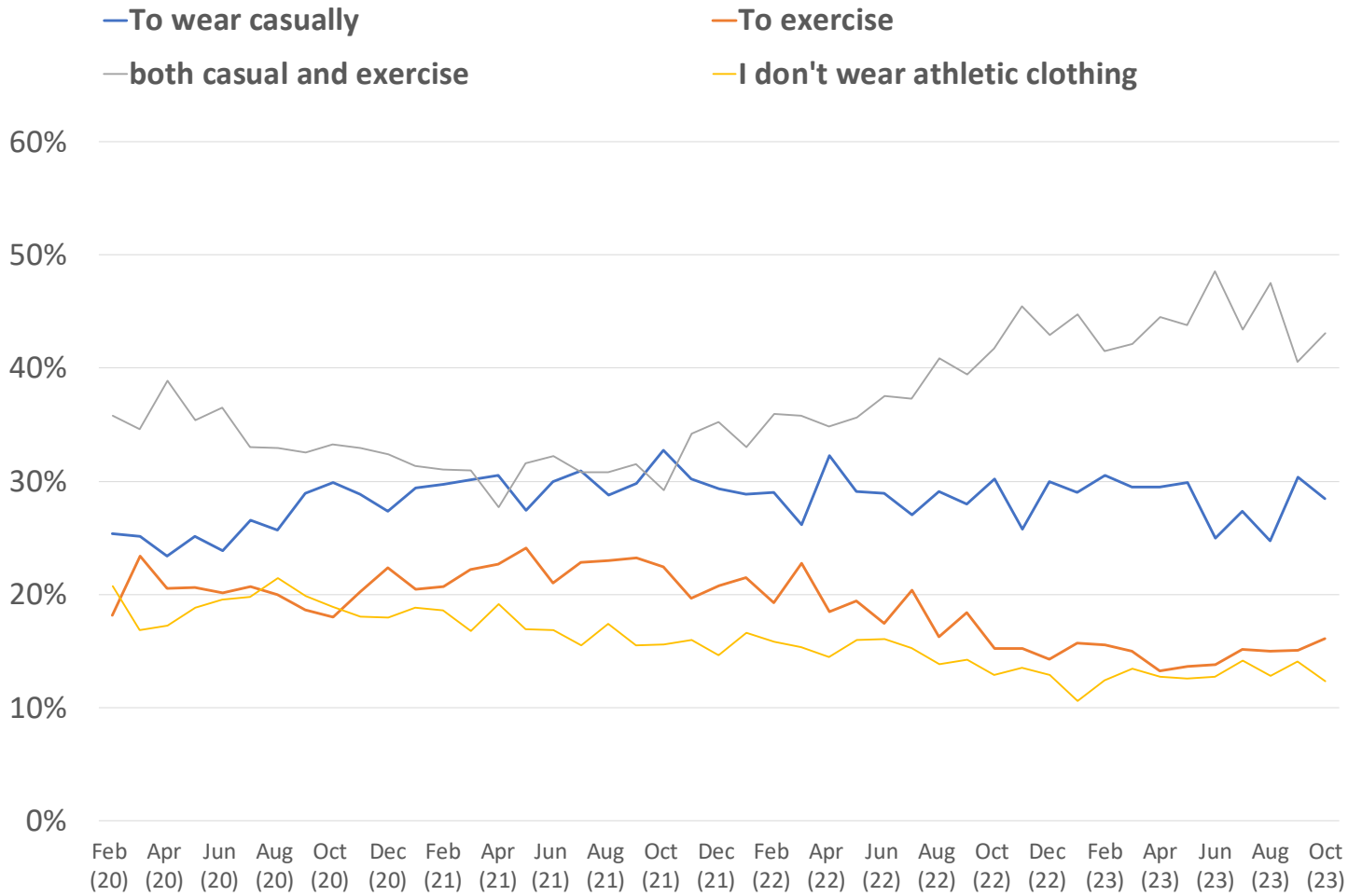
Posed to all respondents



CASUAL WEAR

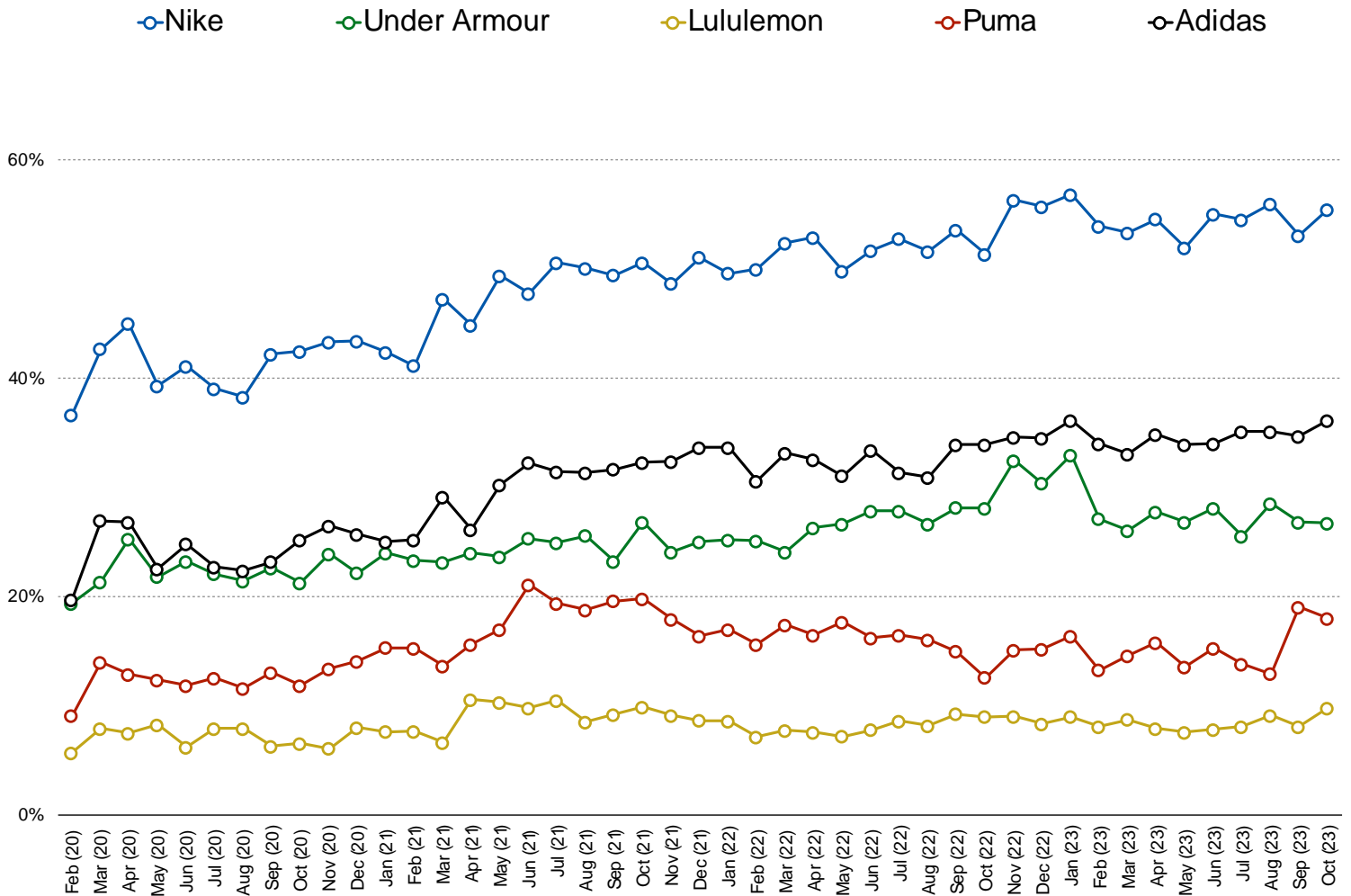
WHAT DO YOU USE ATHLETIC CLOTHING FOR?

Posed to all respondents



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

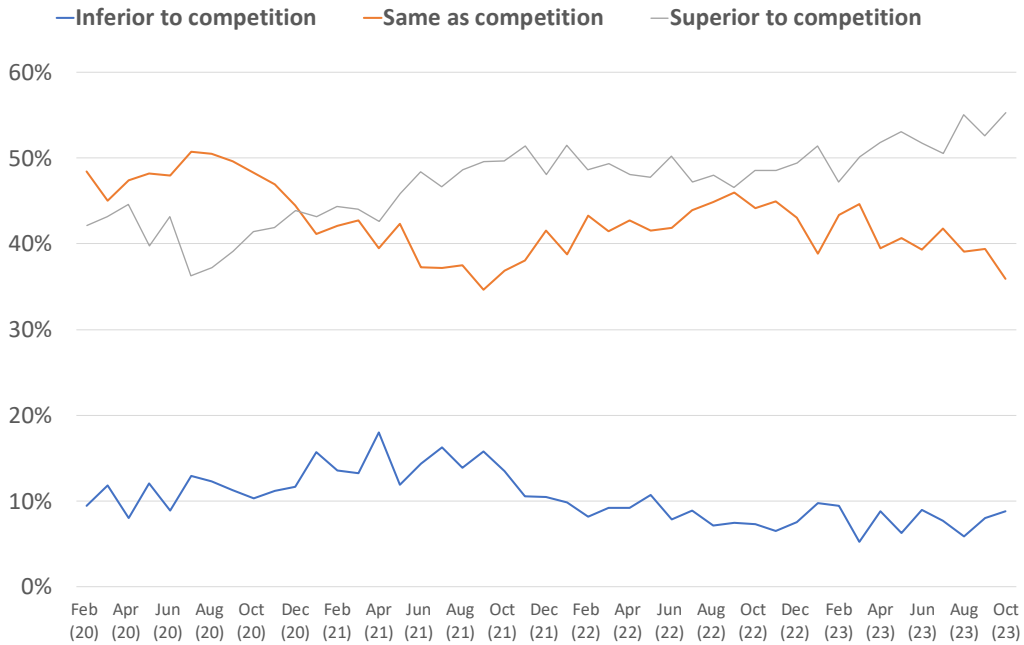
Posed to all respondents



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

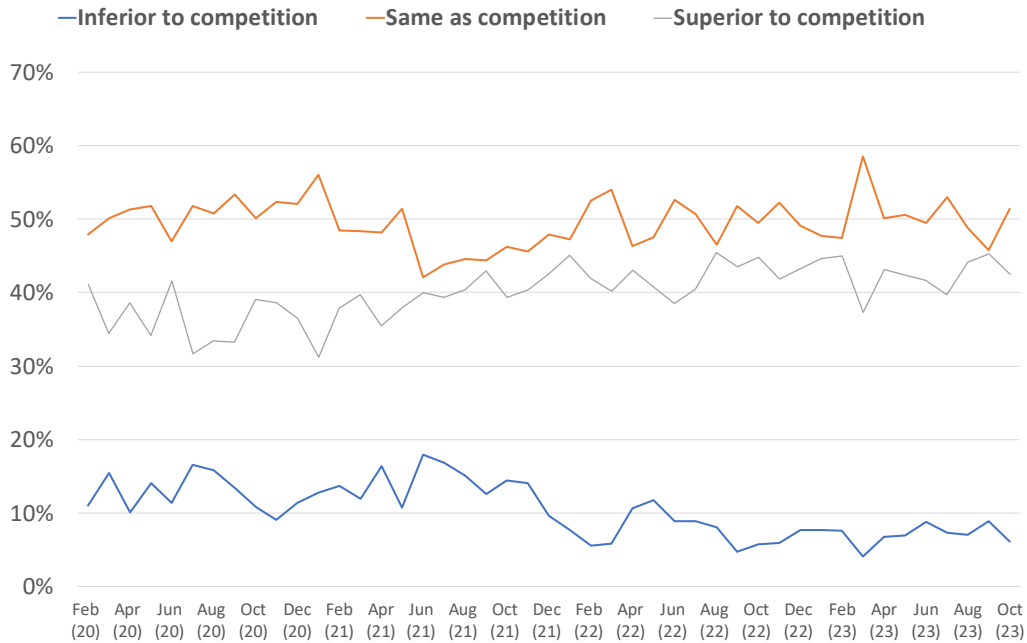
NIKE



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

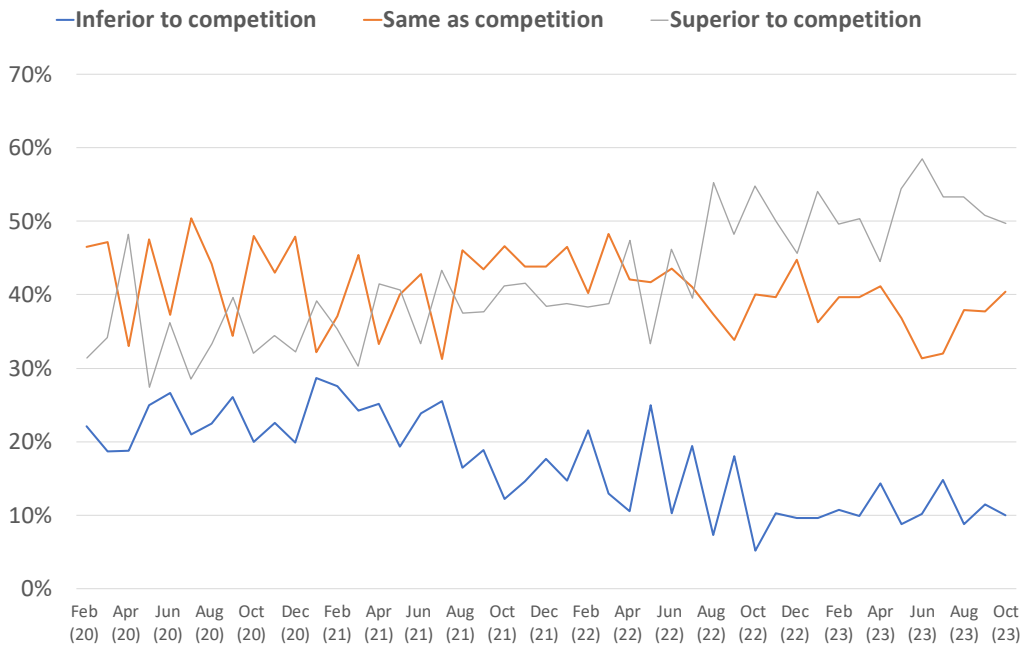
UNDER ARMOUR



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

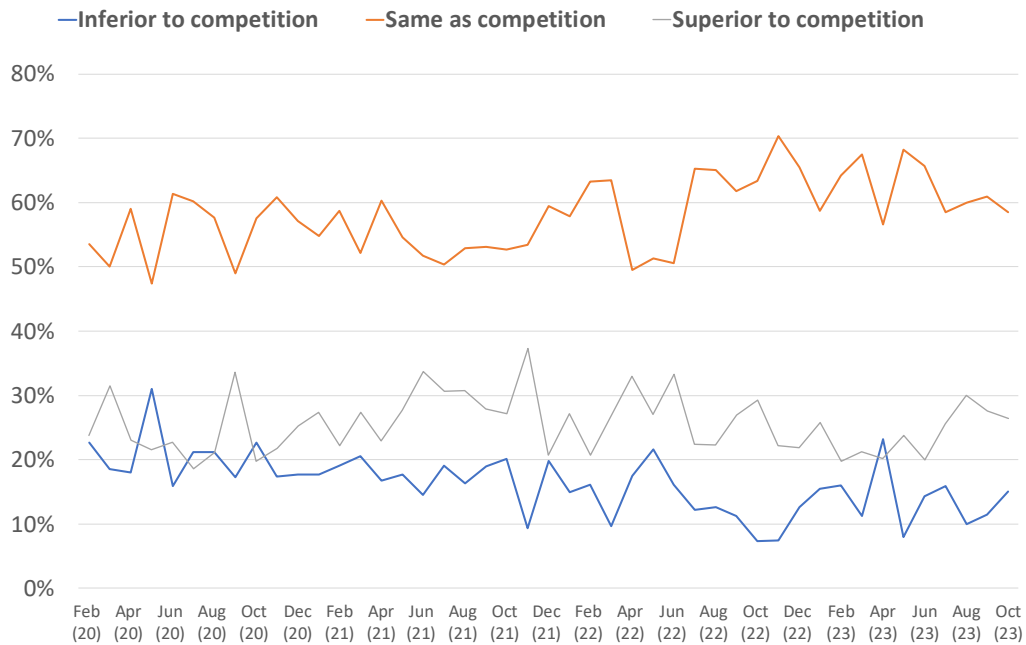
LULULEMON



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

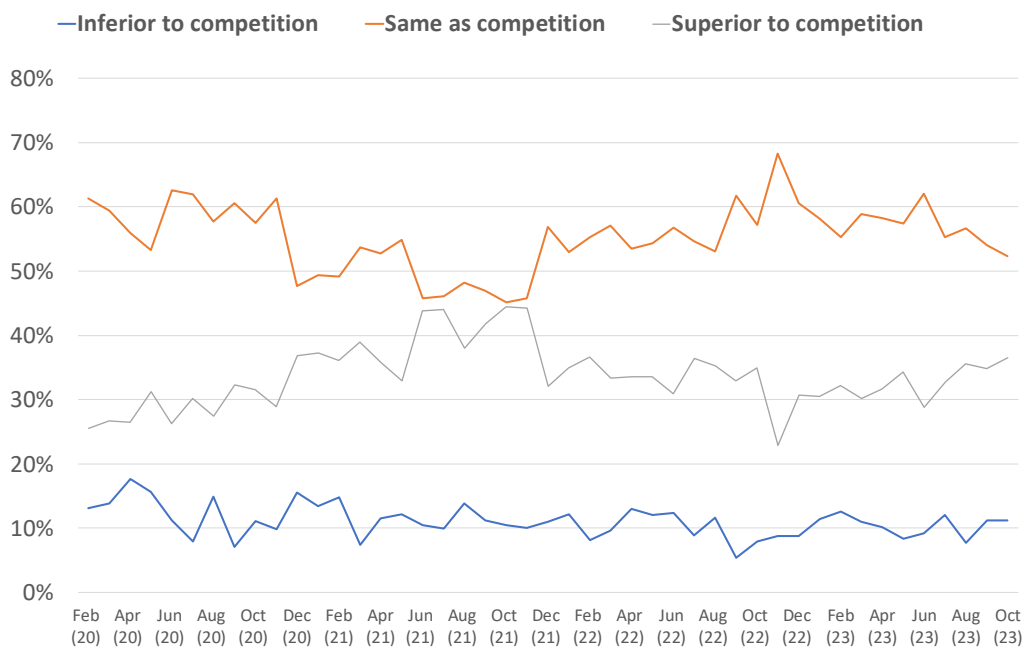
FILA



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

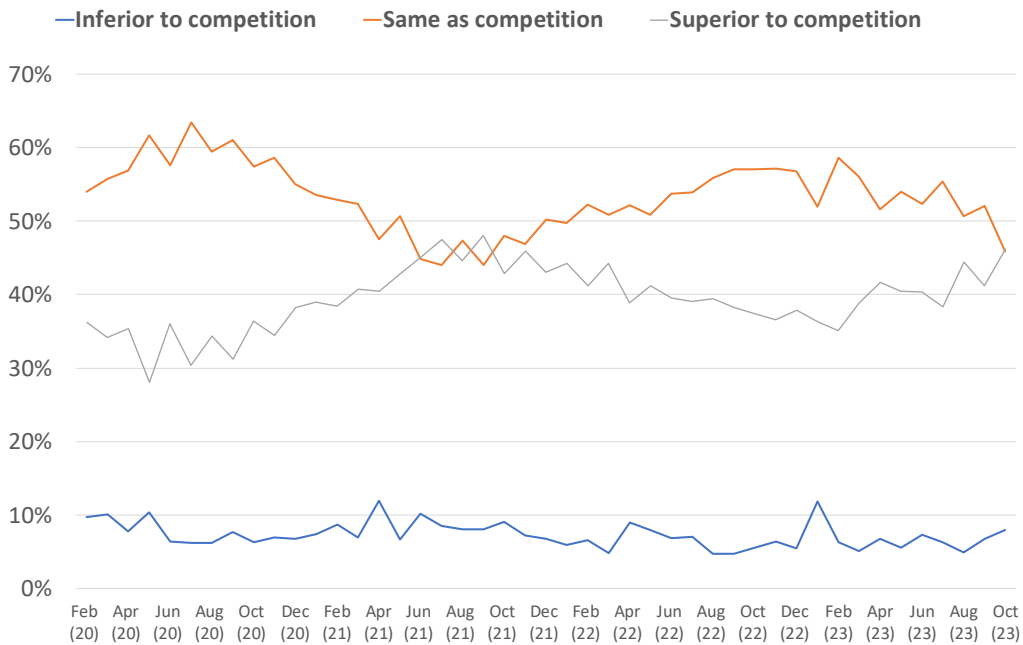
PUMA



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

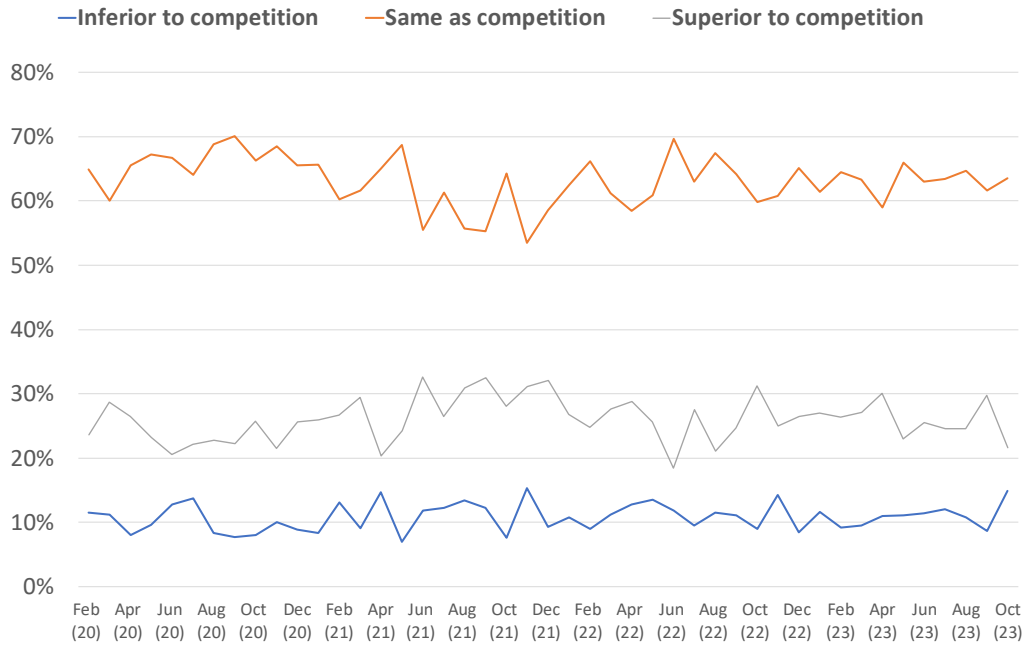
ADIDAS



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

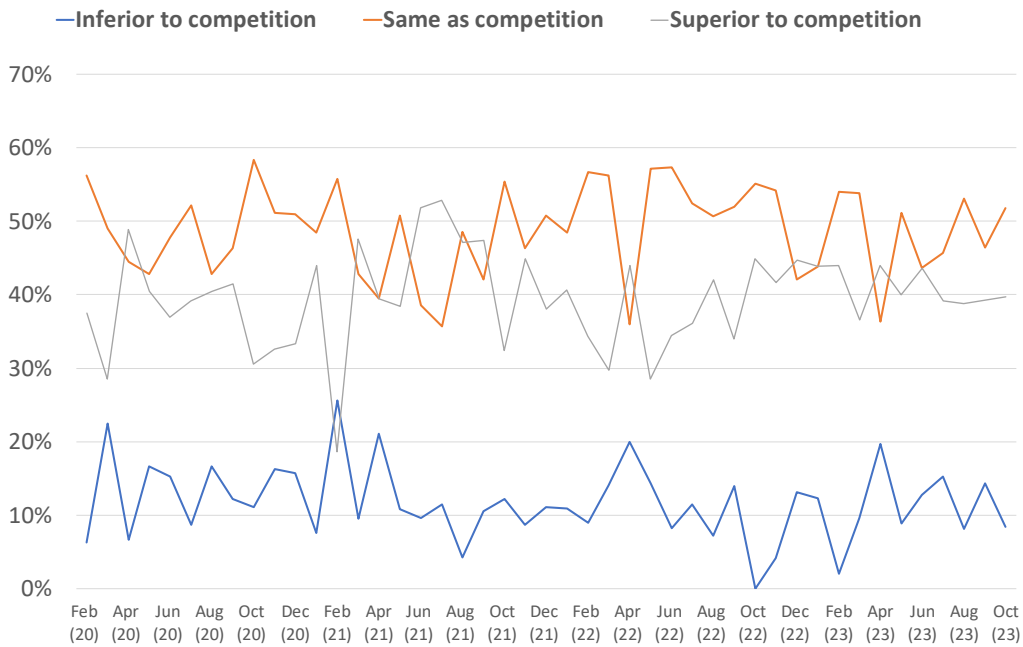
CHAMPION



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

