



## Footwear and Athletic Wear

Volume 32 | Quarterly Survey

1,250 US Consumers Balanced To Census

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

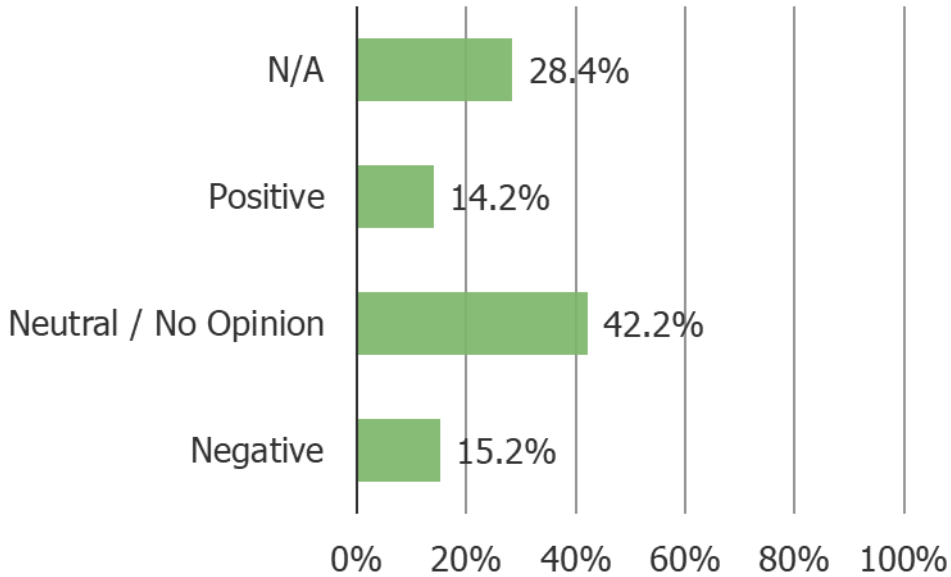
### **Key Takeaways:**

- ❑ Consumers have mixed opinions of the Yeezy brand. There is a cohort that is negative on the brand specifically because of the association with Kanye West.
- ❑ On the other hand, there are some consumers who would consider buying them, especially at a discount (particularly those who have owned or used Yeezy's now or in the past).
- ❑ While buying footwear online and directly from the retailer has grown in popularity since the inception of our survey, progress of these KPIs in our survey have been flatter of late. Power buyers in particular (younger respondents and respondents who buy sneakers multiple times per year) are more likely to prefer online and direct from brand.
- ❑ In recent volumes (over the past year or so) self-reports footwear purchase frequency and recency has pulled back some. The data is in-line with historical levels prior to Covid/initial post-Covid quarters.
- ❑ Consumers are increasingly saying that they wear athletic clothing. Customers of Nike and Lululemon are the most likely to call them out as superior to other brands.
- ❑ Nike continues to test well for footwear across both the general population and runners in particular.

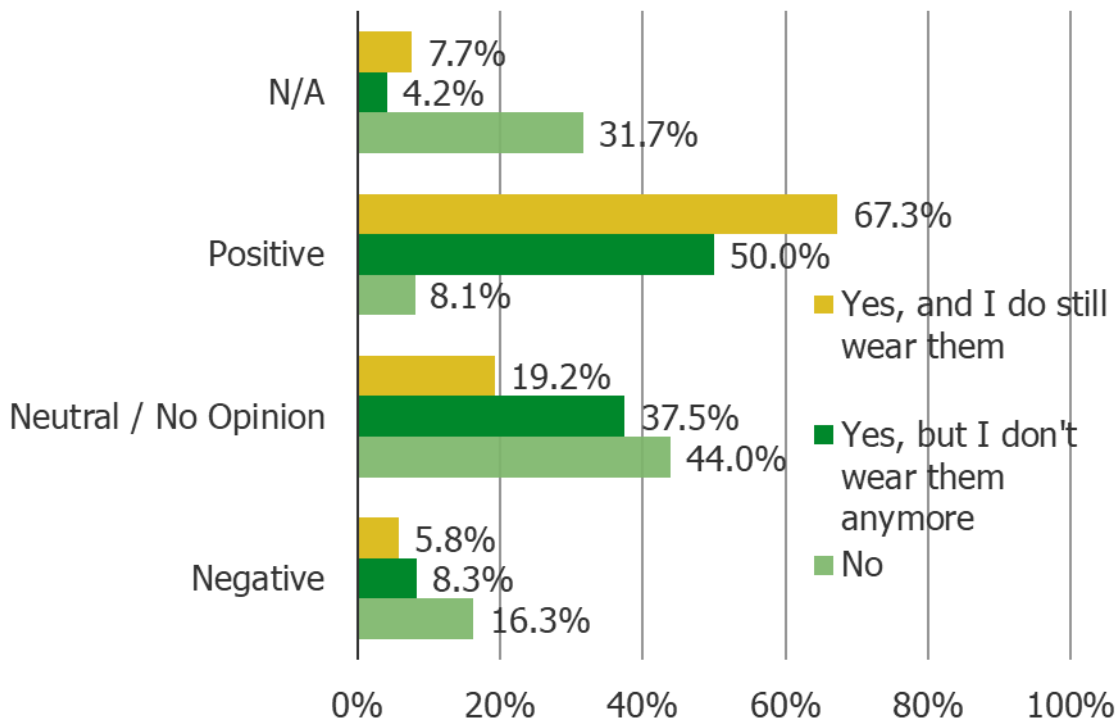
## NEW QUESTIONS

WHAT IS YOUR OPINION OF YEEZY FOOTWEAR?

Posed to all respondents

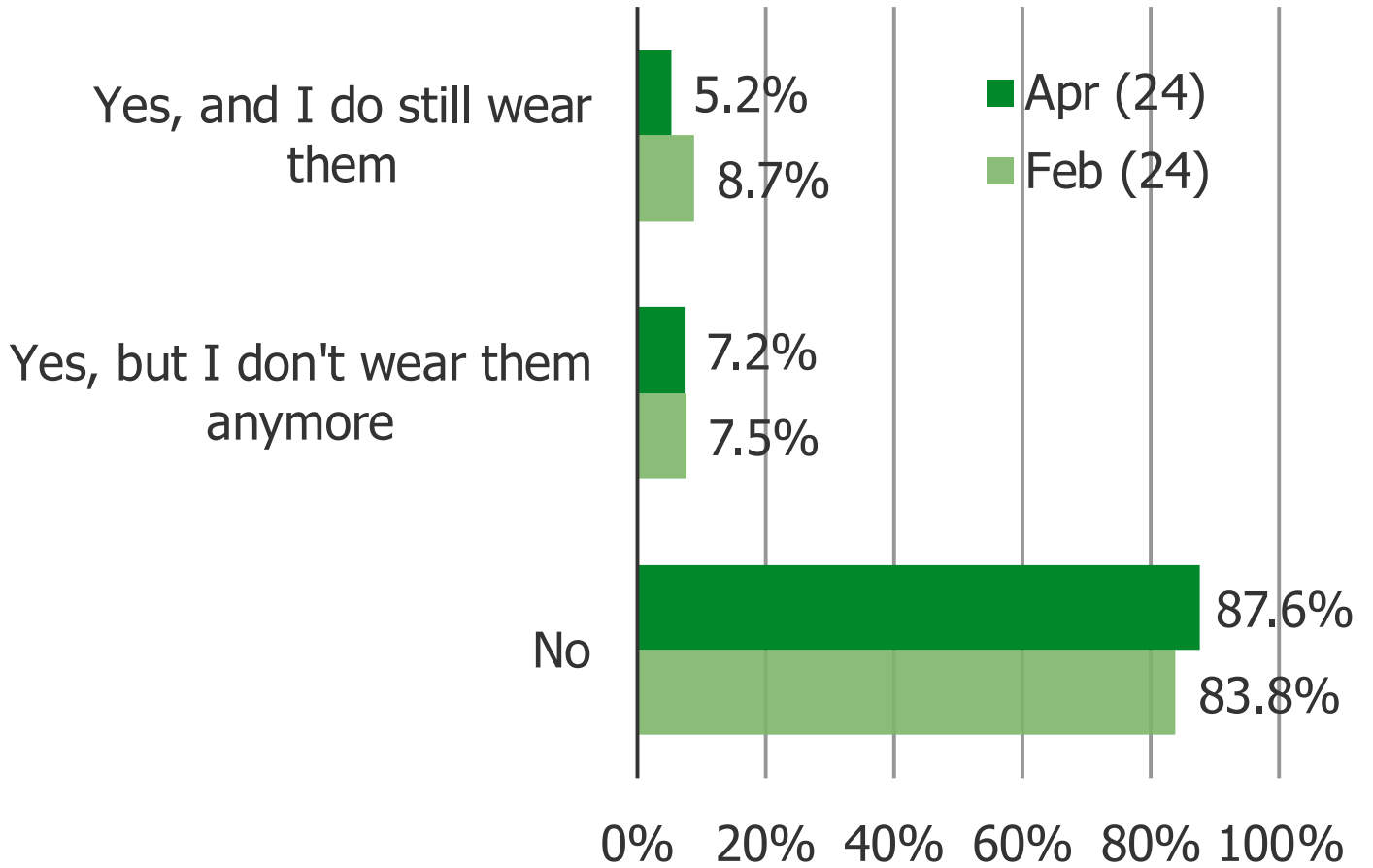


Cross-tabbing the data above by experience with Yeezy footwear...



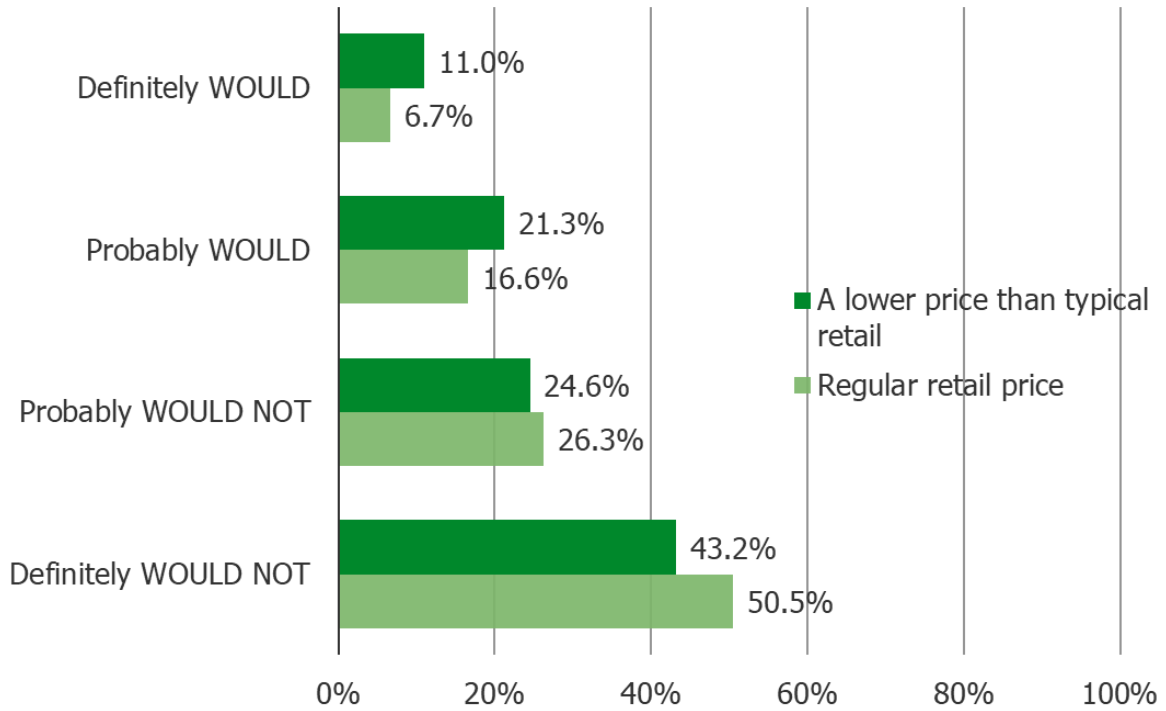
DO YOU OWN ANY PAIRS OF YEEZY SNEAKERS? EXAMPLE PICTURED ABOVE

Posed to all respondents

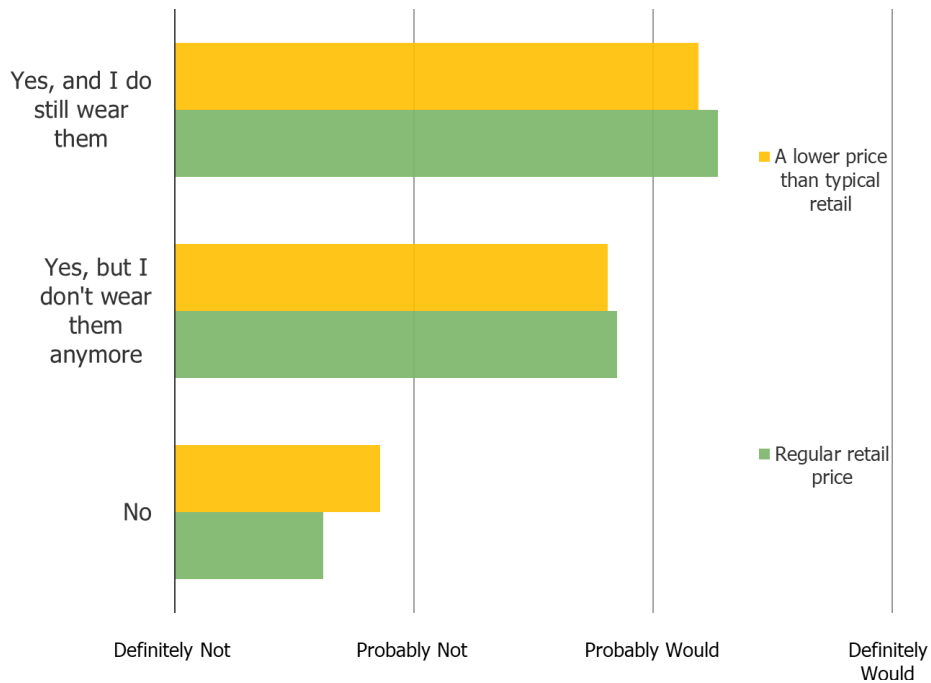


HOW LIKELY WOULD YOU BE TO BUY A PAIR OF YEEZY'S IF THEY WERE RELEASED AT...

Posed to all respondents

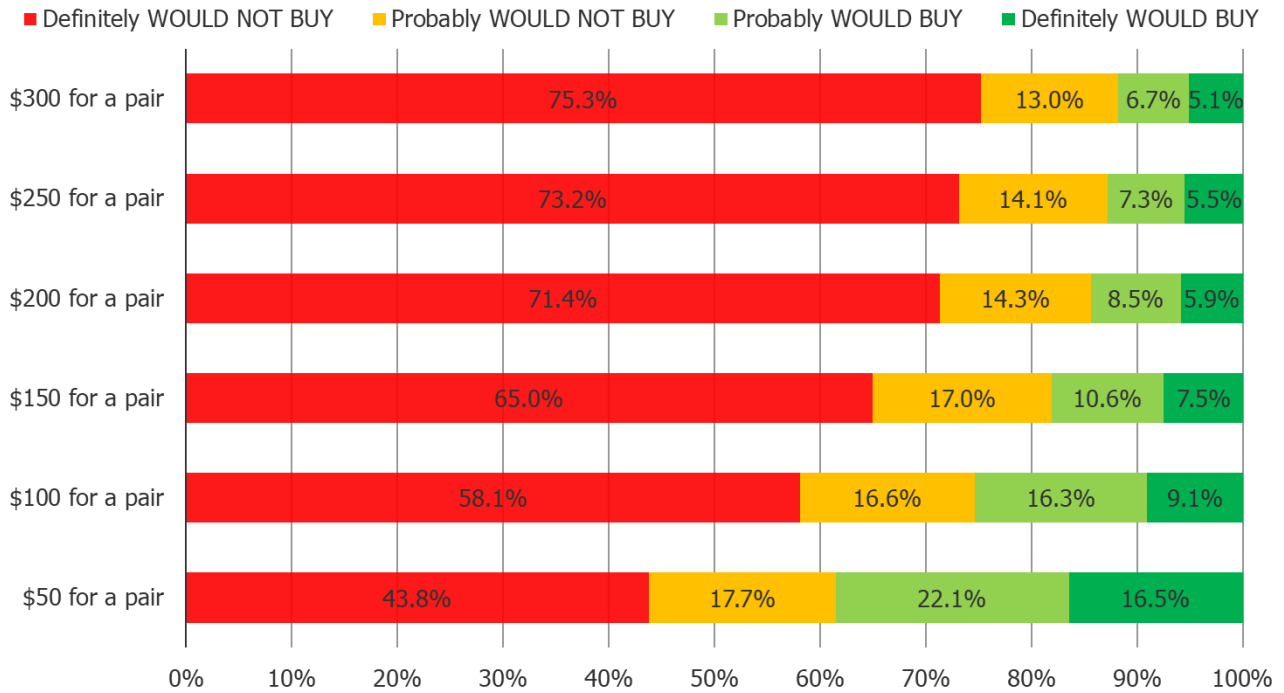


Cross-tabbing the data above by experience with Yeezy footwear...

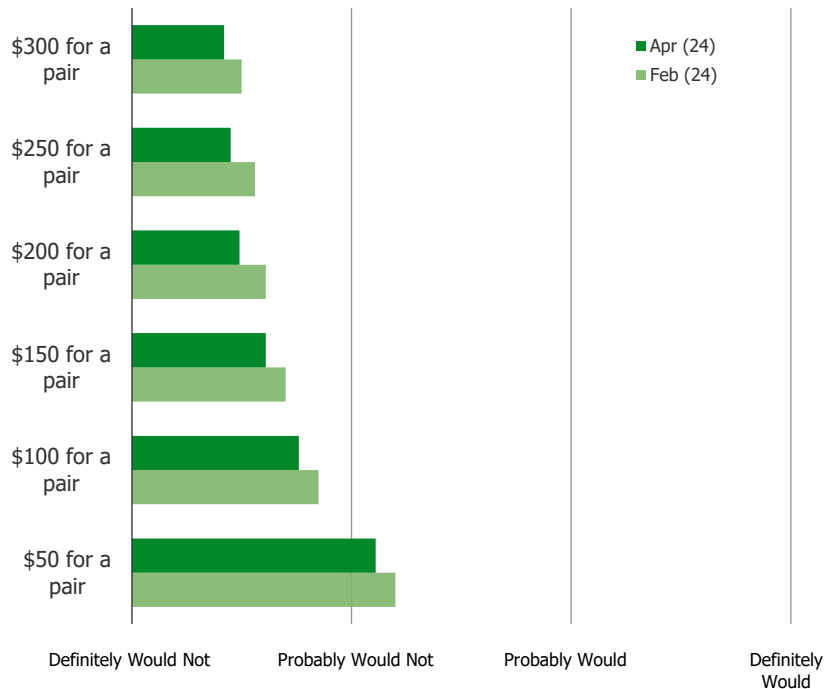


IF YOU LEARNED THAT YEEZY'S FOOTWEAR WAS AVAILABLE FOR PURCHASE AGAIN AND COST THE FOLLOWING AMOUNTS OF MONEY, HOW LIKELY WOULD YOU BE TO BUY A PAIR? FOR REFERENCE, AN IMAGE OF YEEZY'S ARE PICTURED ABOVE.

Posed to all respondents



Historical Readings...



IF YOU LEARNED THAT YEEZY'S FOOTWEAR WAS AVAILABLE FOR PURCHASE AGAIN AND COST THE FOLLOWING AMOUNTS OF MONEY, HOW LIKELY WOULD YOU BE TO BUY A PAIR? FOR REFERENCE, AN IMAGE OF YEEZY'S ARE PICTURED ABOVE.

### Optional Comments...

Definitely would not buy.  
Discount programs stimulate shopping.  
Disgusting  
Do not like the style  
Don't approve of Kanye anymore  
don't know the brand  
don't know the brand  
Don't know, never tried a pair on!  
Don't like the style  
Don't like the style of shoes  
Don't like the style, would not buy them.  
Don't like them they are ugly.  
For a good price I would buy a pair for myself an my daughter  
Fck Kanye  
He is a disgusting person  
Hunny, I am not paying more than 20\$ for a pair of shoes. I am poor.  
I buy sneakers for running not for style  
i cant afford these at that price point. I am functionally broke.  
I couldnt buy them as my feet are narrow and delicate and hard to find a comfortable pair of shoes  
i did not like the styles of yeezy's  
I do not like the look of them. I do not support the person who is associated with this brand.  
I do t like the color or style  
I don't give money to Nazis  
I don't know  
I dont like their looks  
I don't like this style  
I don't like Yeezys  
I don't prefer this brand.  
I don't purchase garbage footwear.  
I don't want to put money in Kanye's pocket.  
I have a ton of shoes. I don't need any more. Converse would be a comfort shoe. Sketchers are extremely comfortable. I also love my Tiger Blue Lines. I still have a beautiful pair still in the box.  
I have never paid more than \$60 for a pair of shoes  
I have never seen a pair of sneakers worth more than \$15.  
I have no interest  
I like more feminine styles.  
I never heard of them  
I think they are ugly looking shoes definitely not my style  
I think they're ugly, and have no interest in them whatsoever.  
I won't give Kanye a dime  
I would buy a cheap pair in order to resell  
I would buy them  
I would have to try them on, depends on how much I like them  
I would if they had a good sale on them  
I would love to buy them  
I would never buy no matter what the cost  
I would never buy these because i dont believe in the makers beliefs  
I would never buy this brand

IF YOU LEARNED THAT YEEZY'S FOOTWEAR WAS AVAILABLE FOR PURCHASE AGAIN AND COST THE FOLLOWING AMOUNTS OF MONEY, HOW LIKELY WOULD YOU BE TO BUY A PAIR? FOR REFERENCE, AN IMAGE OF YEEZY'S ARE PICTURED ABOVE.

### Optional Comments...

I would never buy those shoes

I would not buy at all no matter the price. I don't like them

I would not buy because of the affiliation with Kanye and it doesn't matter what the price. I wouldn't even wear them if they were free.

I would not buy these ugly looking shoes even at 1 dollar

I would not buy this brand. I have 3 friends who had them and they all broke in less than a year. You couldn't pay me to wear them.

I would not buy those kind of shoes

I would not consider Yeezy brand based on the poor behavior of the business owner.

I would purchase for the correct price

id buy it if it went back on sale

I'd never give him my money.

If you gave a pair of sneakers to me I would give them away

I'm Brooks sneaker fan

Inflation is kicking our ass 80.00 shoes to much

I've never heard of them so I probably would not buy them.

Might buy if I was in need of them

Neither to expensive

Never

Never heard of that brand

never heard of them

never heard of them

Never heard of them or seen them

Never heard of them, but the might be worth looking at

No

No

no clue

No opinion

no wzy

None

none

None

None thay are ugly

Not a fan of Yeezy

Not a style I would choose

Not familiar with them

not interested

Not interested in them.

not interested in yeezy footwear

not my style

not sure

Nothing

Only if sold at Yeezy.com

Probably wouldn't

Resale

Sorry, but they look really ugly

The cut doesn't flatter my legs, so even on sale or not most probably would not buy

The fit is much more important than cost to me



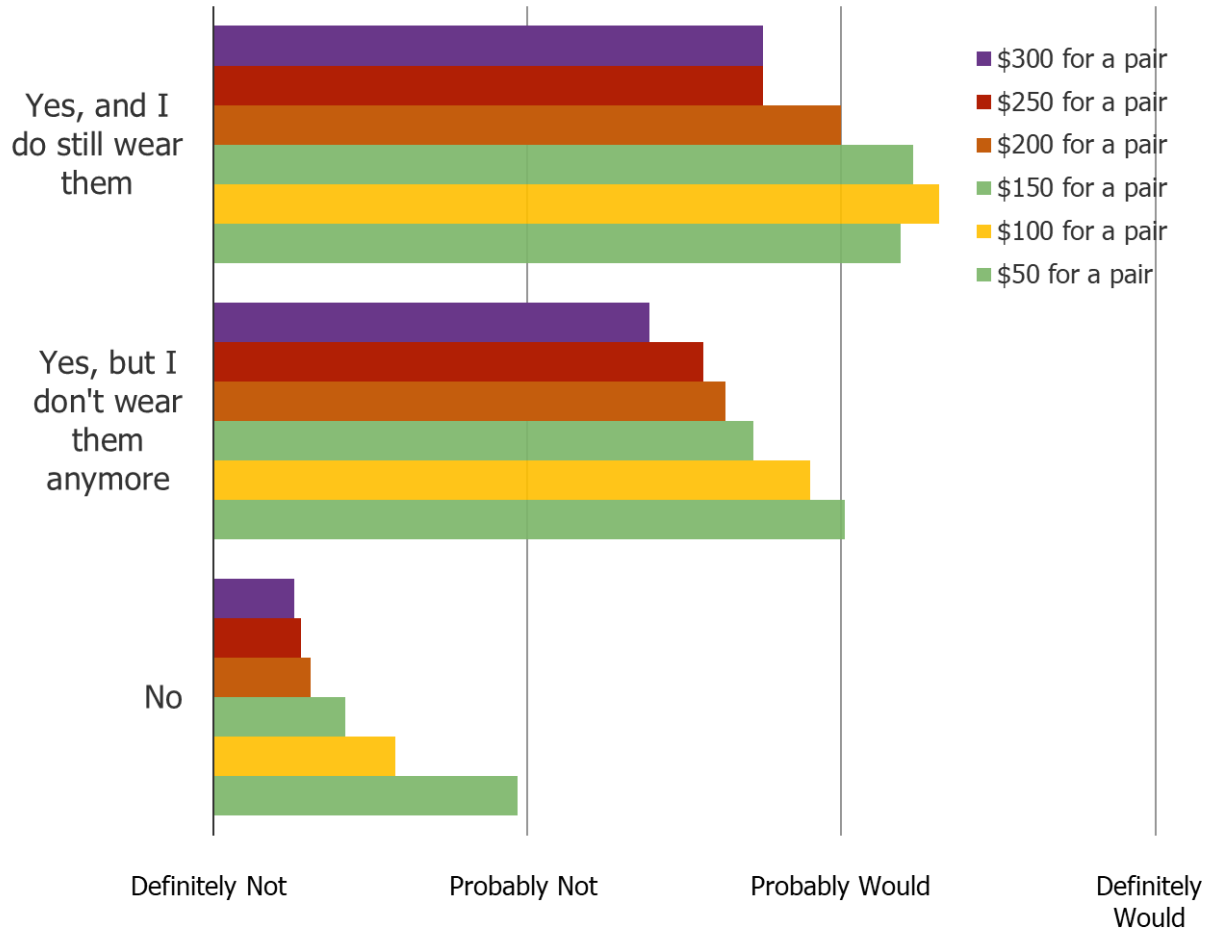
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### Optional Comments...

I would never buy those shoes The shoes are too expensive new.  
There shoes has a comfortable appealing look to them  
these are very nice looking shoes  
They are for running I am mobility challenged can not use these  
They are hideous  
They are not visually appealing shoes  
They are ugly  
They are ugly and, I can't stand making a guy I hate richer  
they are ugly to me  
They are UGLY!  
They don't look comfortable. I'm not interested in purchasing these.  
they look kinda cheap.  
They look terrible and Kanye West is a genuinely bad person  
they look ugly  
They look ugly, so even if they weren't associated with Kanye I wouldn't want them.  
They wouldn't last a day in my lifestyle.  
They're not very attractive.  
They're ugly  
They're ugly and weird looking. I wouldn't care how low the price was.  
This is nice and very good.  
Throw them in trash  
Too expensive!!!  
Ugly  
ugly style  
ugly!  
Was not interested before and will not be in the future  
Would  
Would definitely consider  
would NEVER buy a product from Yeezy  
Yeezy is a Terribly Bad Influence...  
Yeezys are ugly sneakers  
Yeezys look stupid  
Yes \$50  
Yes only at a great price

IF YOU LEARNED THAT YEEZY'S FOOTWEAR WAS AVAILABLE FOR PURCHASE AGAIN AND COST THE FOLLOWING AMOUNTS OF MONEY, HOW LIKELY WOULD YOU BE TO BUY A PAIR? FOR REFERENCE, AN IMAGE OF YEEZY'S ARE PICTURED ABOVE.

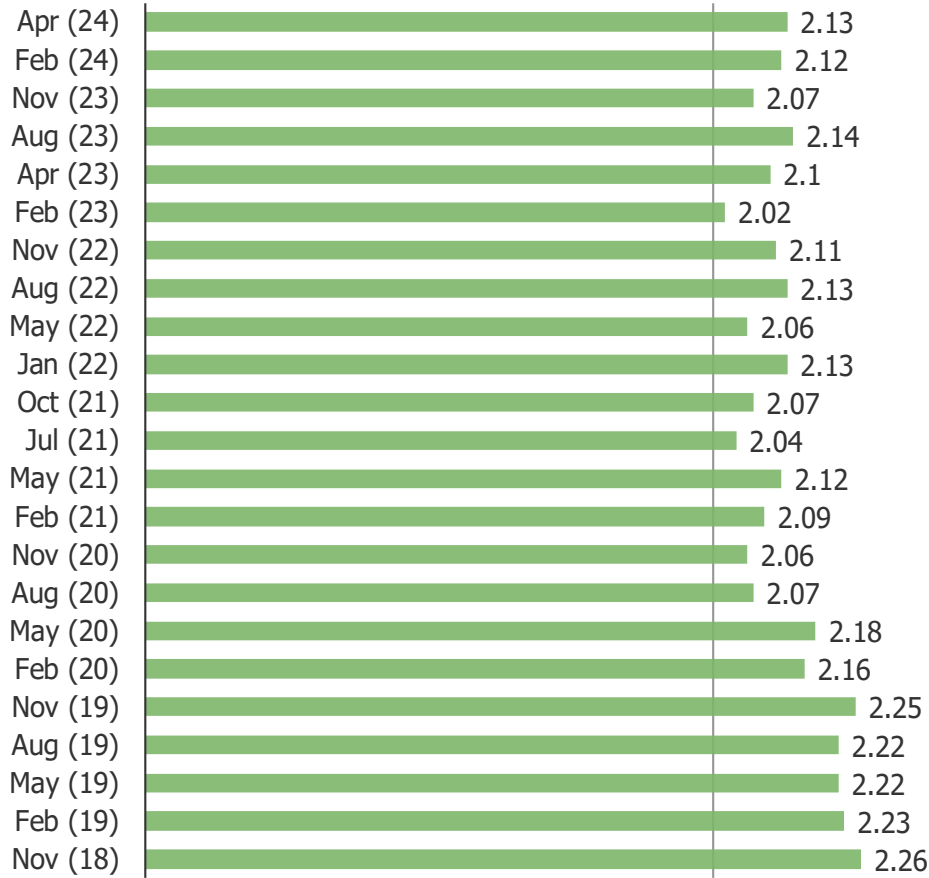
Cross-tabbing the data above by experience with Yeezy footwear...



## FOOTWEAR PURCHASE PREFERENCES

WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

Posed to all respondents



Prefer Direct from Brand Website/Store

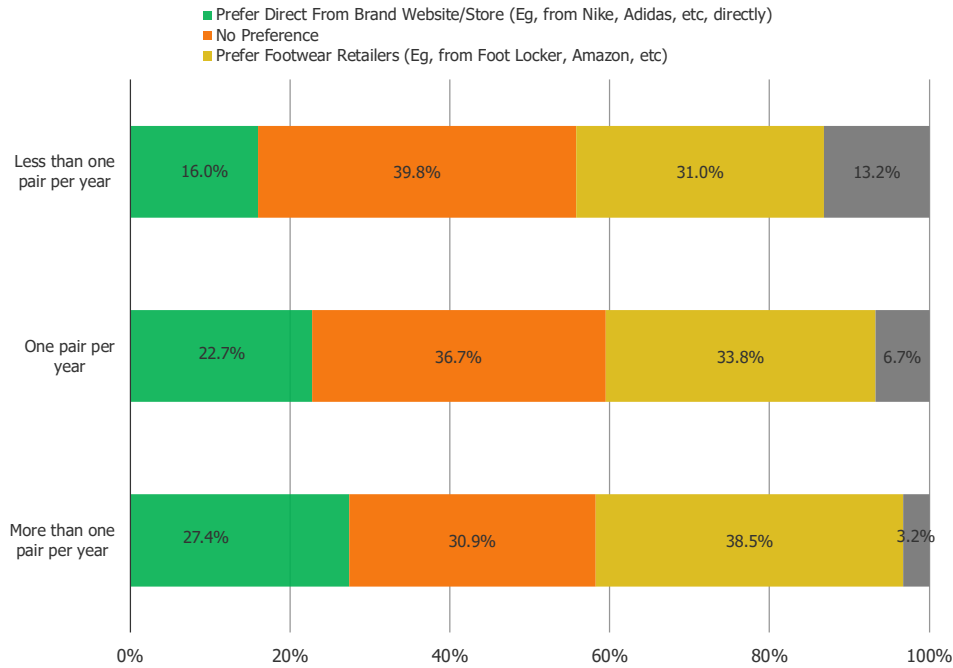
No Preference

Prefer Footwear Retailer

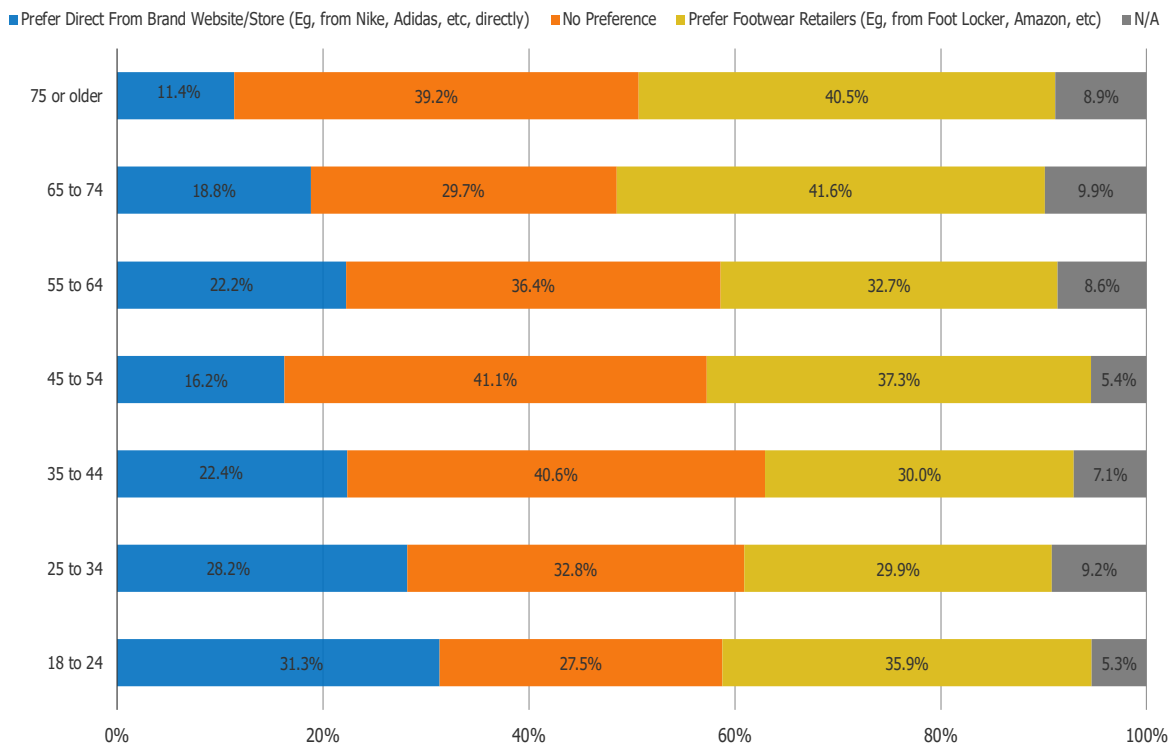
WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

Cross-Tab Analysis

By How Often Consumers Buy Footwear

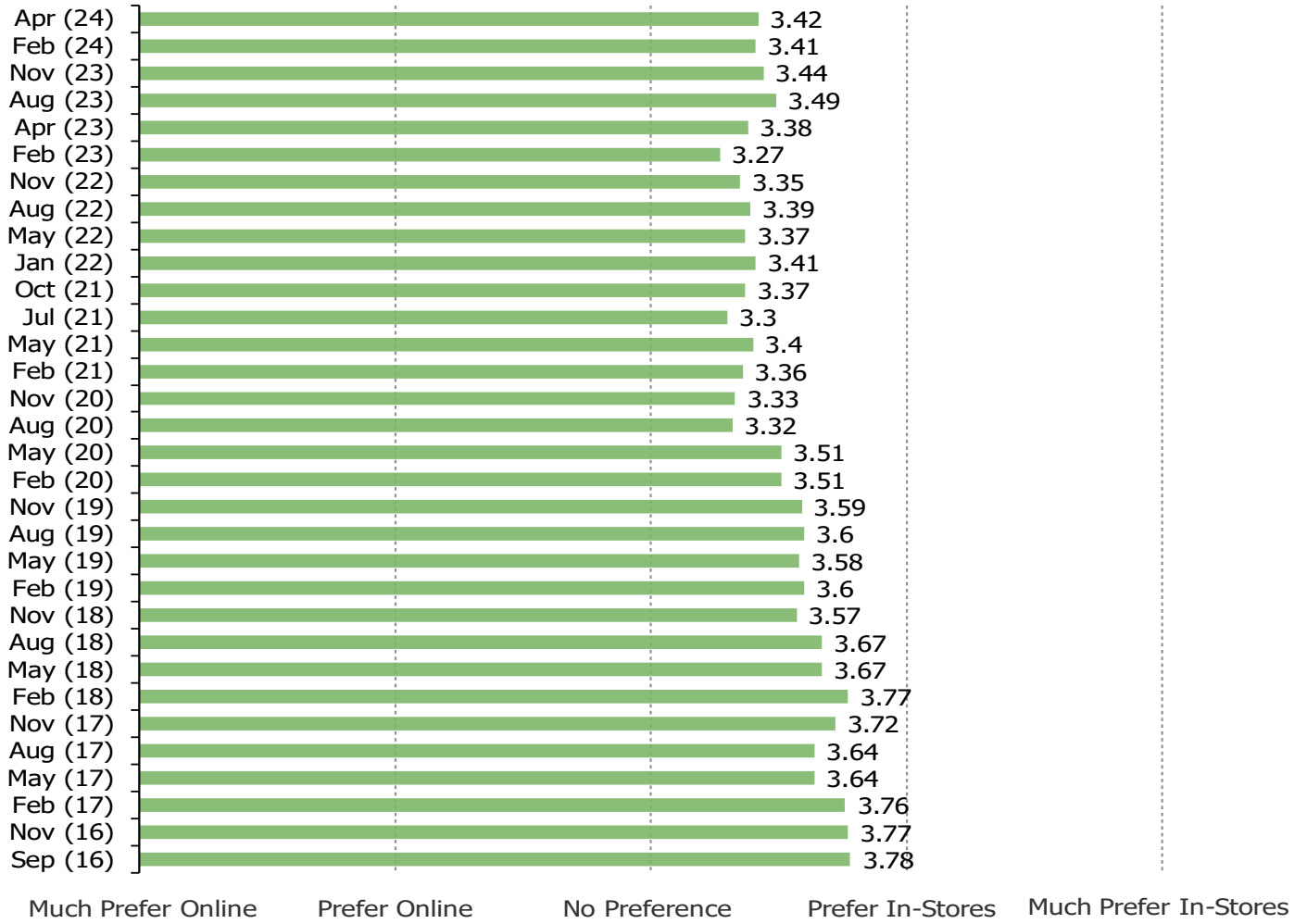


By Age



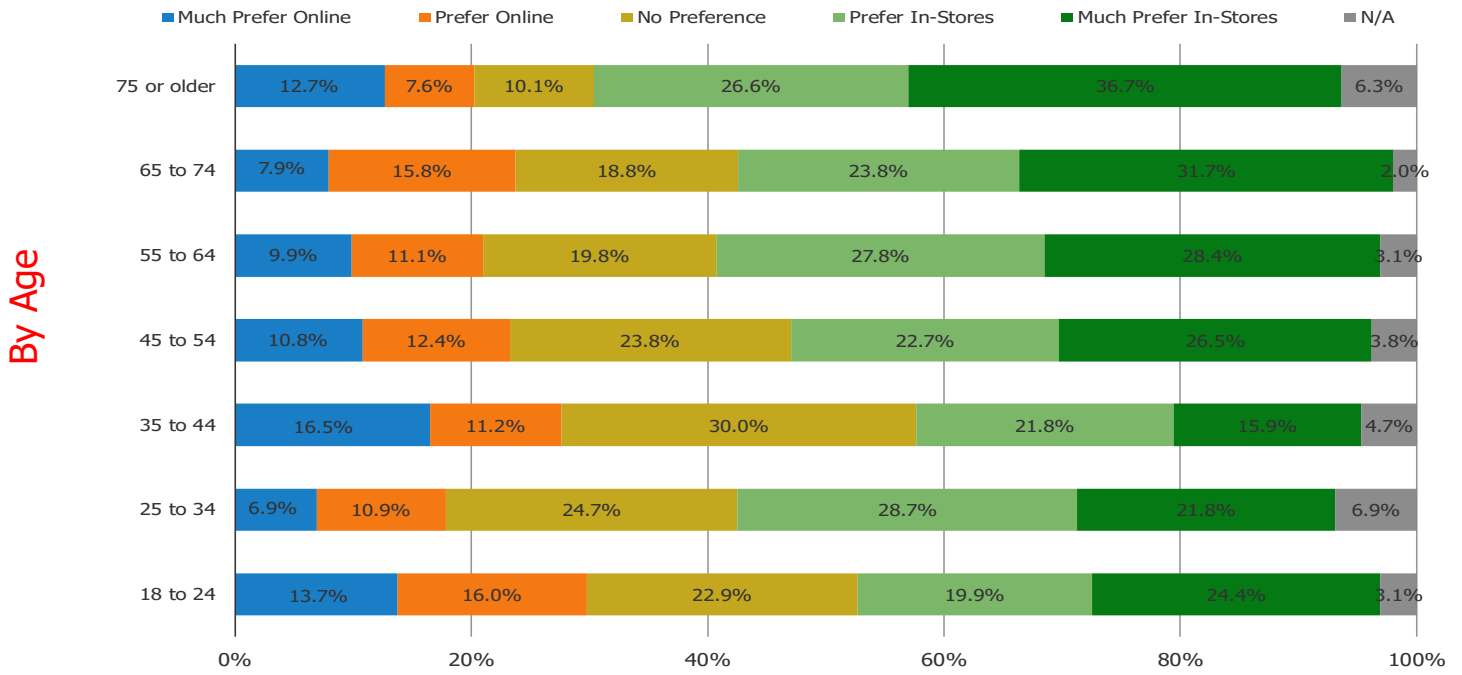
WHERE DO YOU PREFER TO BUY SNEAKERS?

Posed to all respondents



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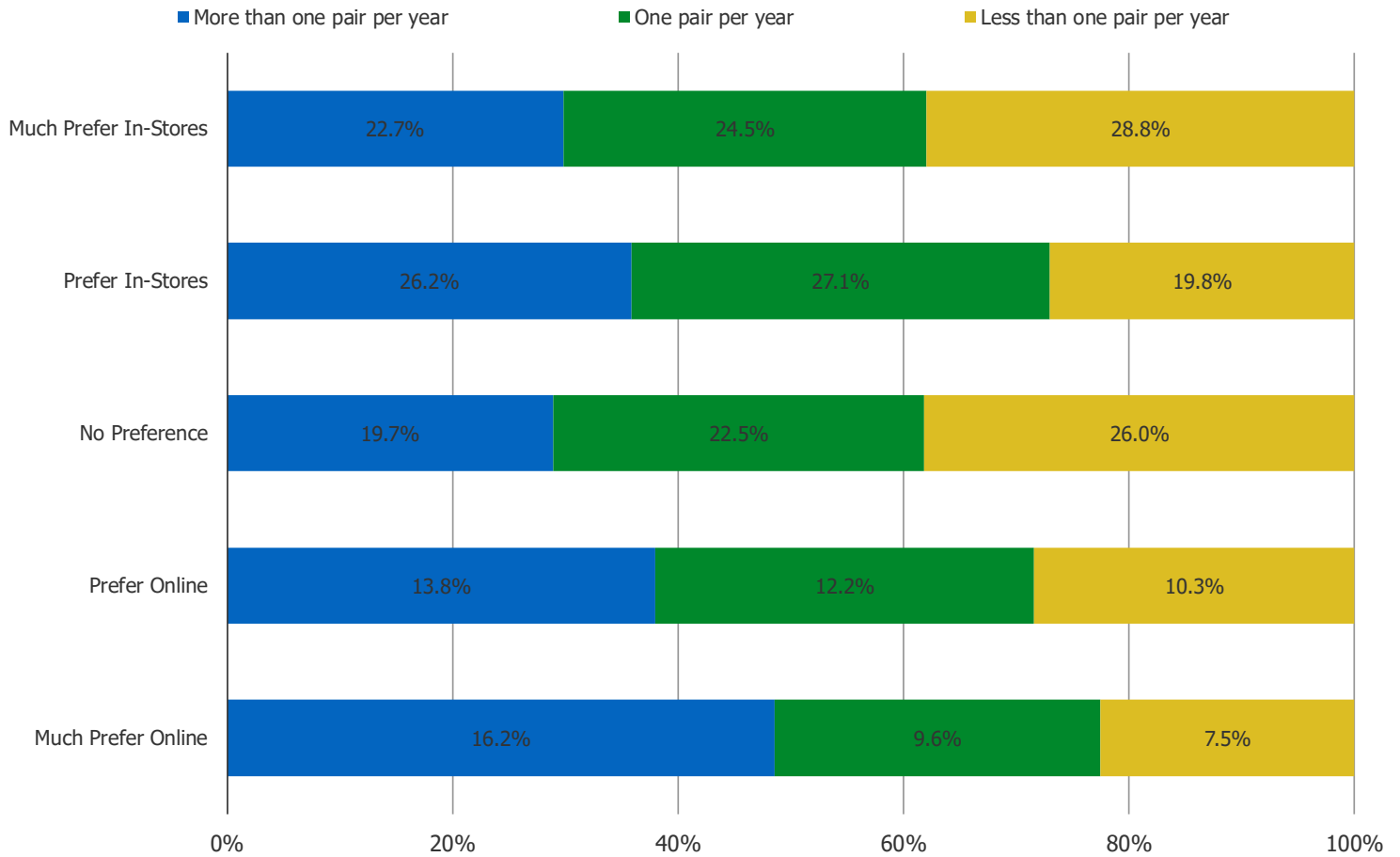
Cross-Tab Analysis



HOW MANY PAIRS OF FOOTWEAR DO YOU BUY PER YEAR?

Cross-Tab Analysis

By How Consumers Prefer To Buy Footwear

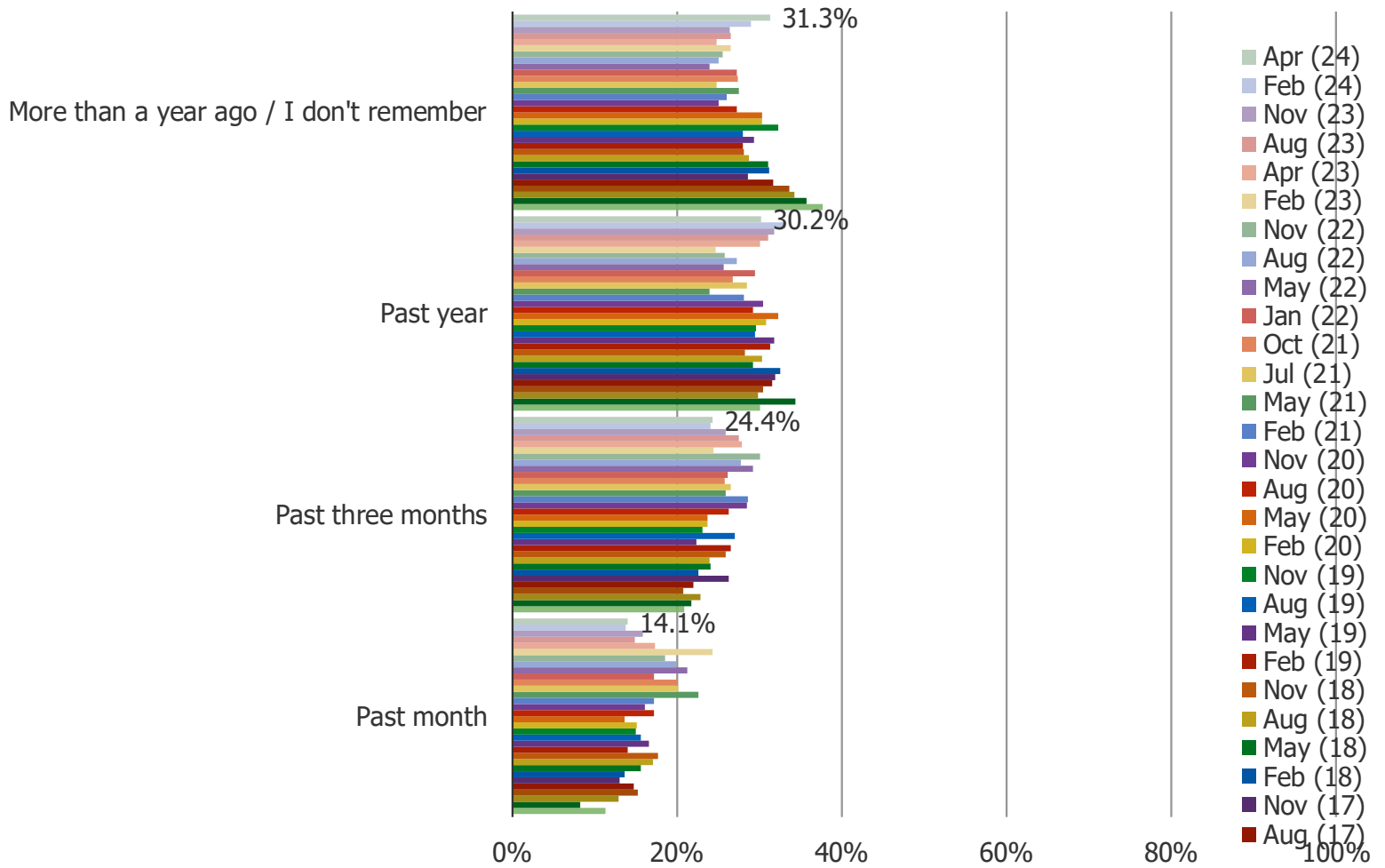




## SNEAKER BUYING TRENDS

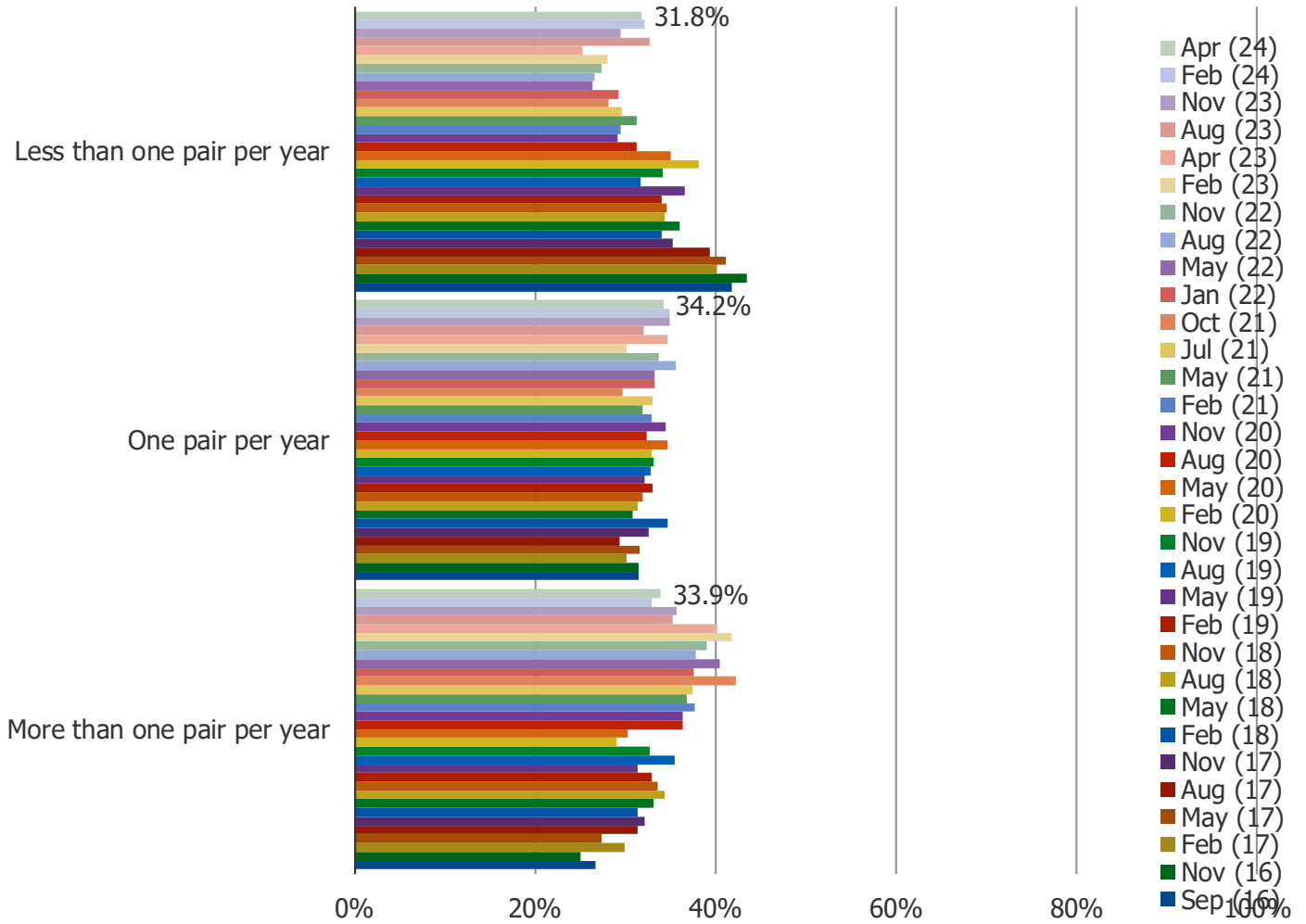
WHEN IS THE LAST TIME YOU BOUGHT A NEW PAIR OF SNEAKERS?

Posed to all respondents



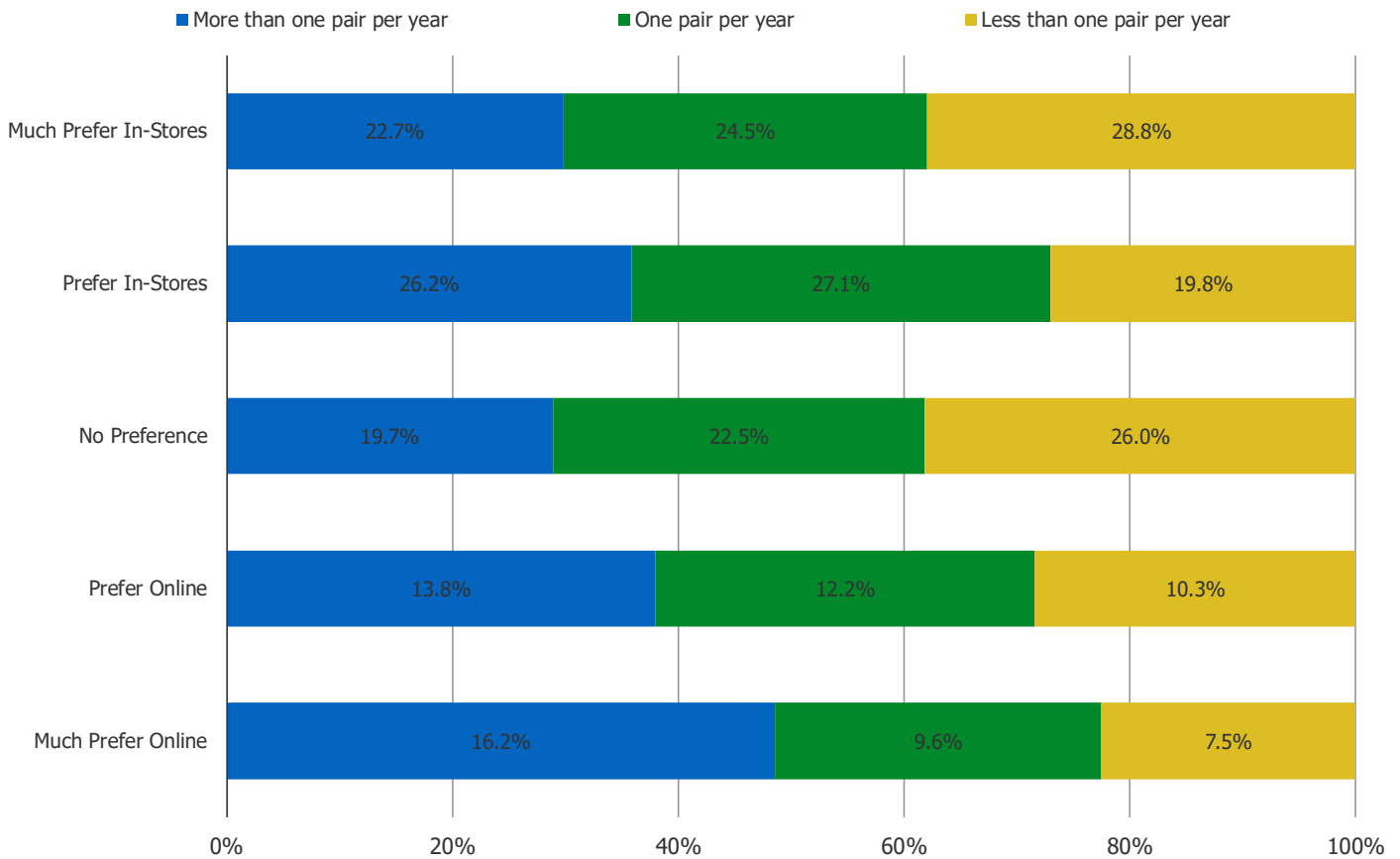
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

Posed to all respondents



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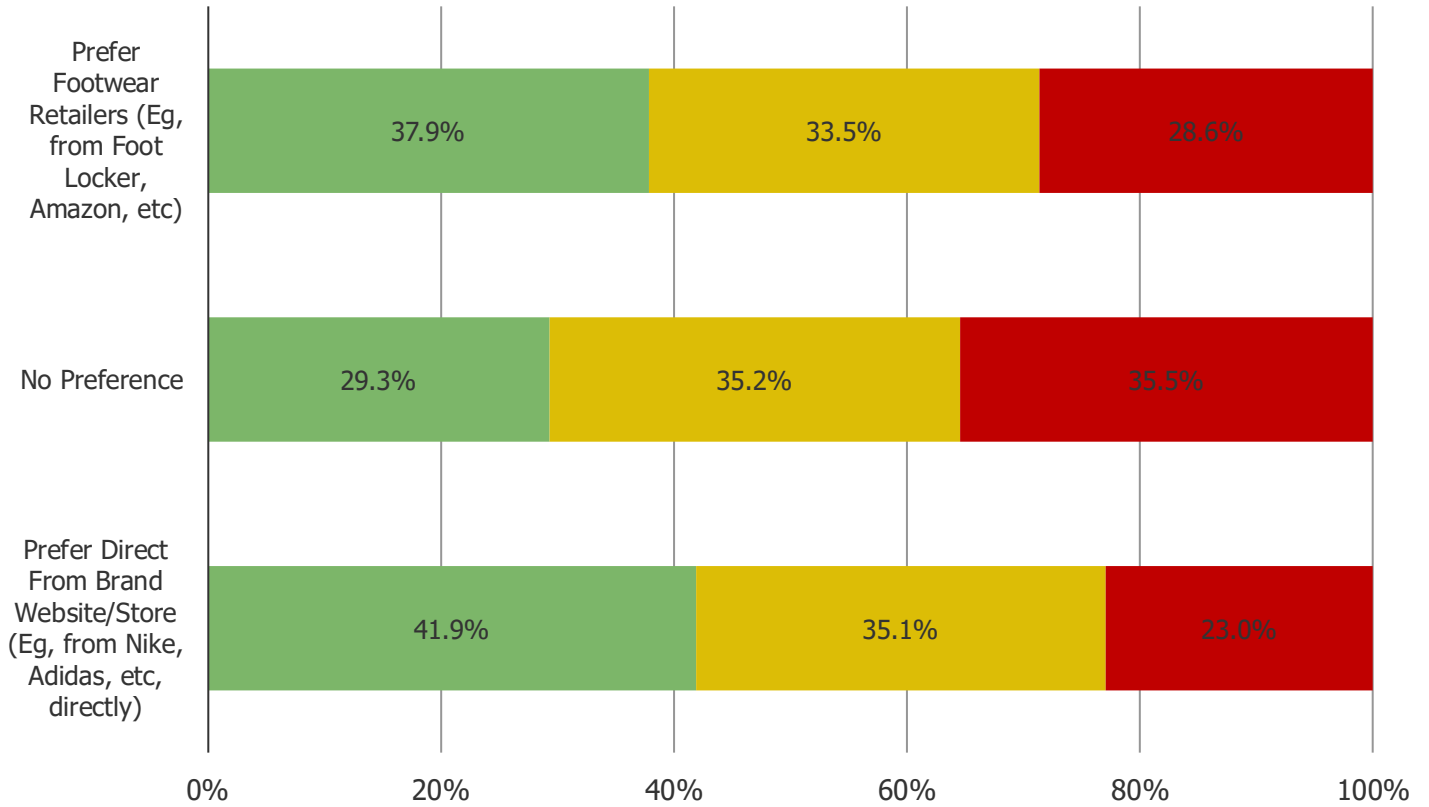
Posed to all respondents – Cross-tabbed by if they prefer to buy online vs. in-stores.



HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

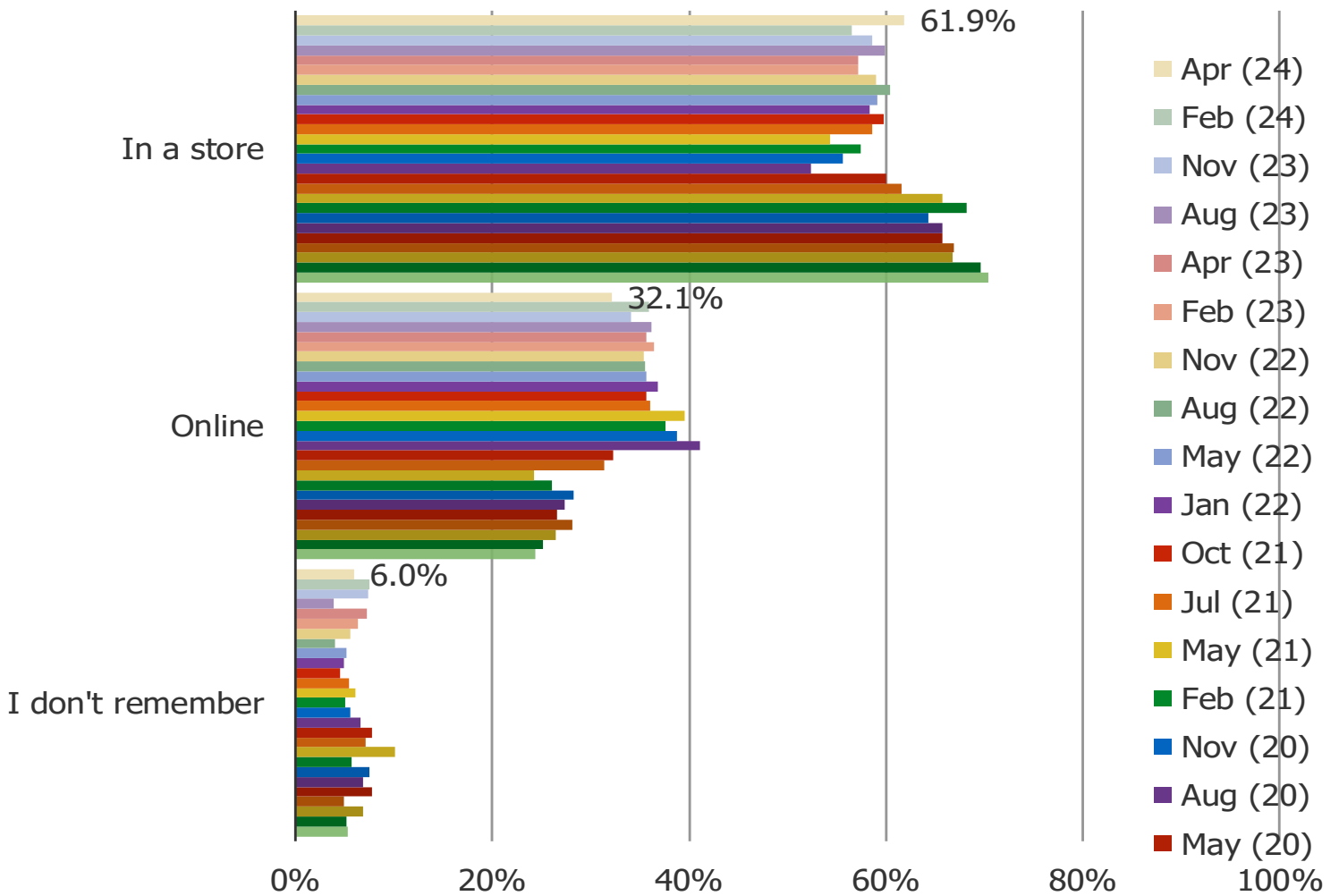
Posed to all respondents – Cross-tabbed by if they prefer to buy direct or from retailers.

■ 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?

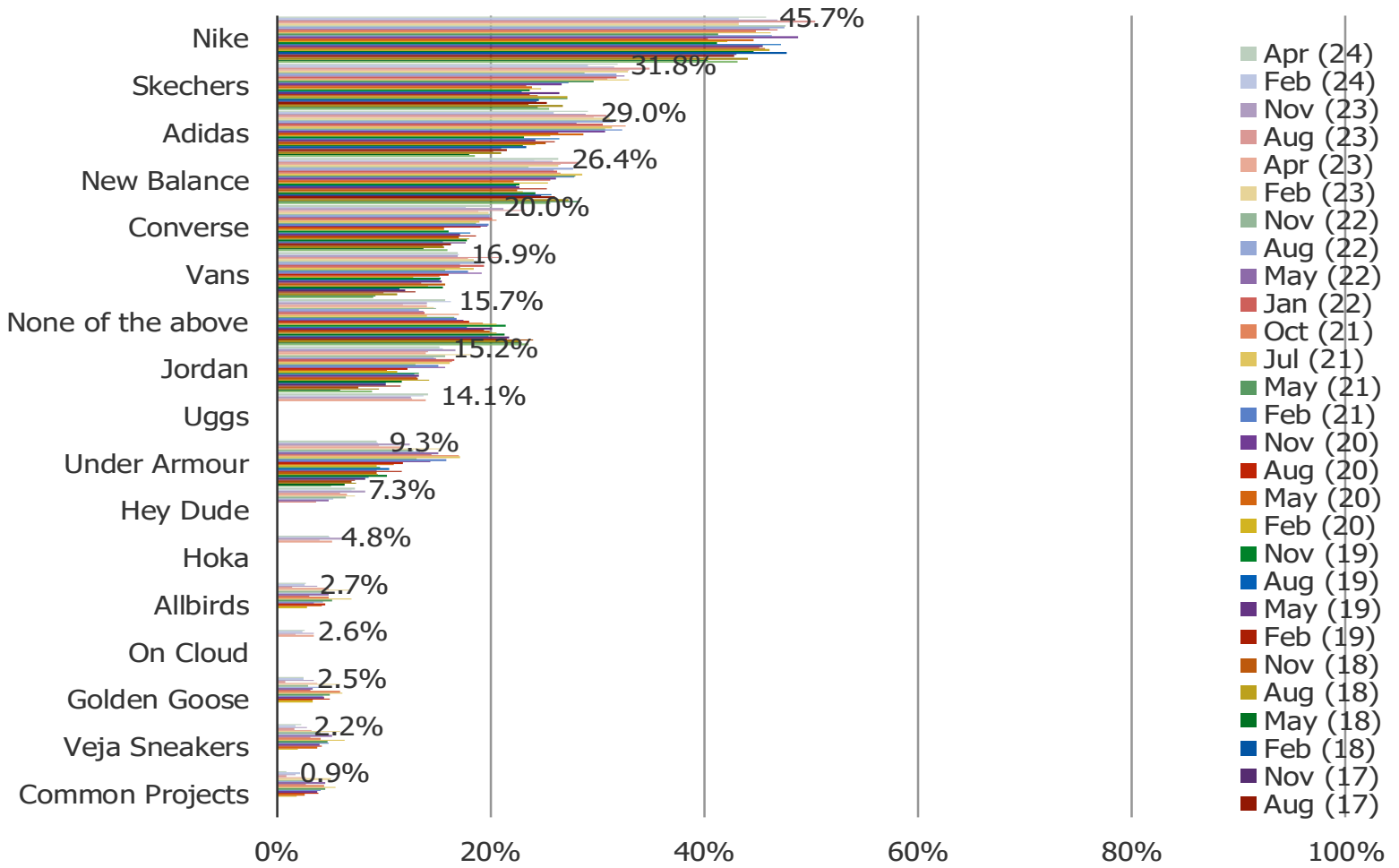
Posed to all respondents



## SNEAKER BRANDS

WHICH OF THE FOLLOWING BRANDS DO YOU OWN SNEAKERS FROM?

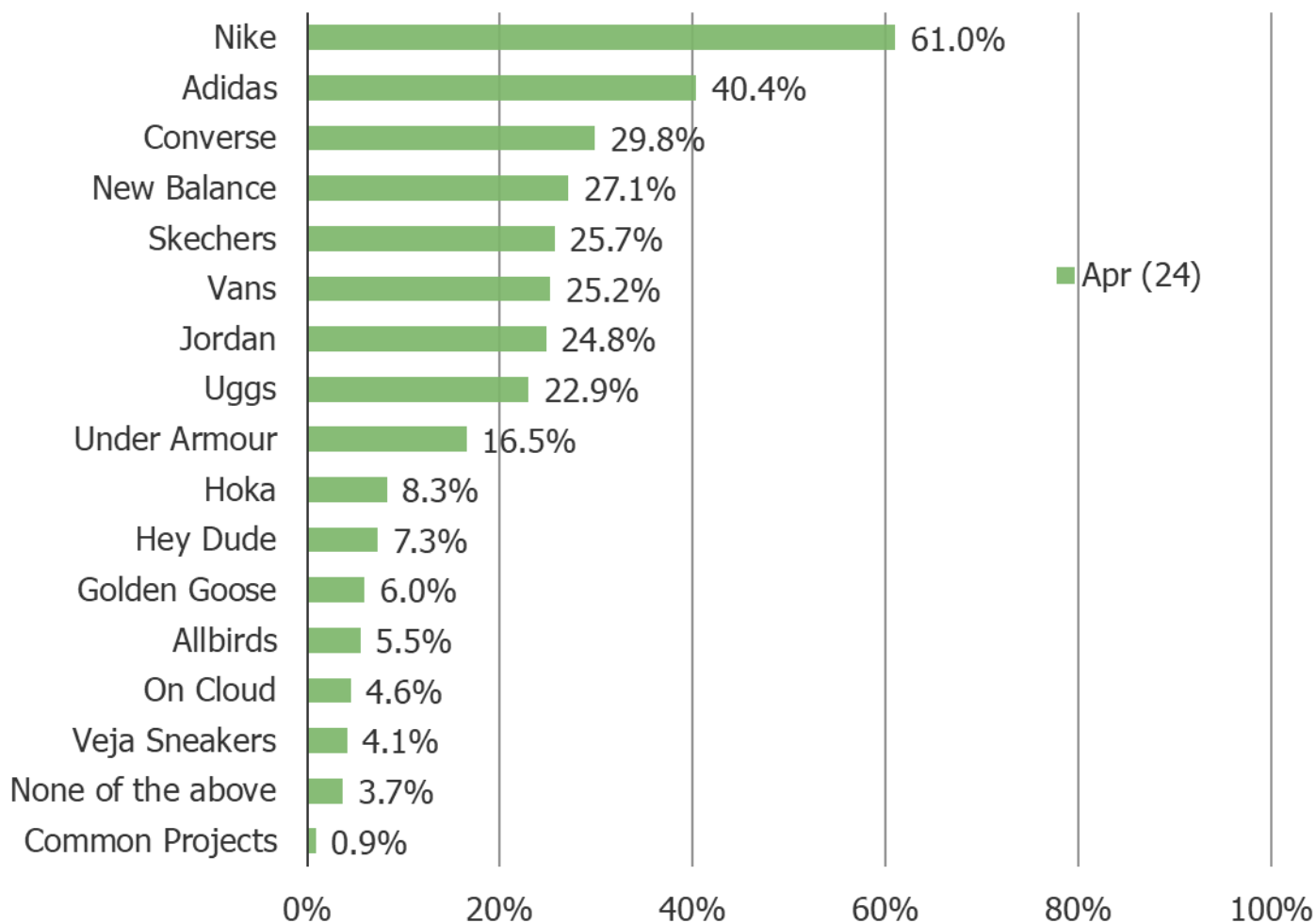
Posed to all respondents





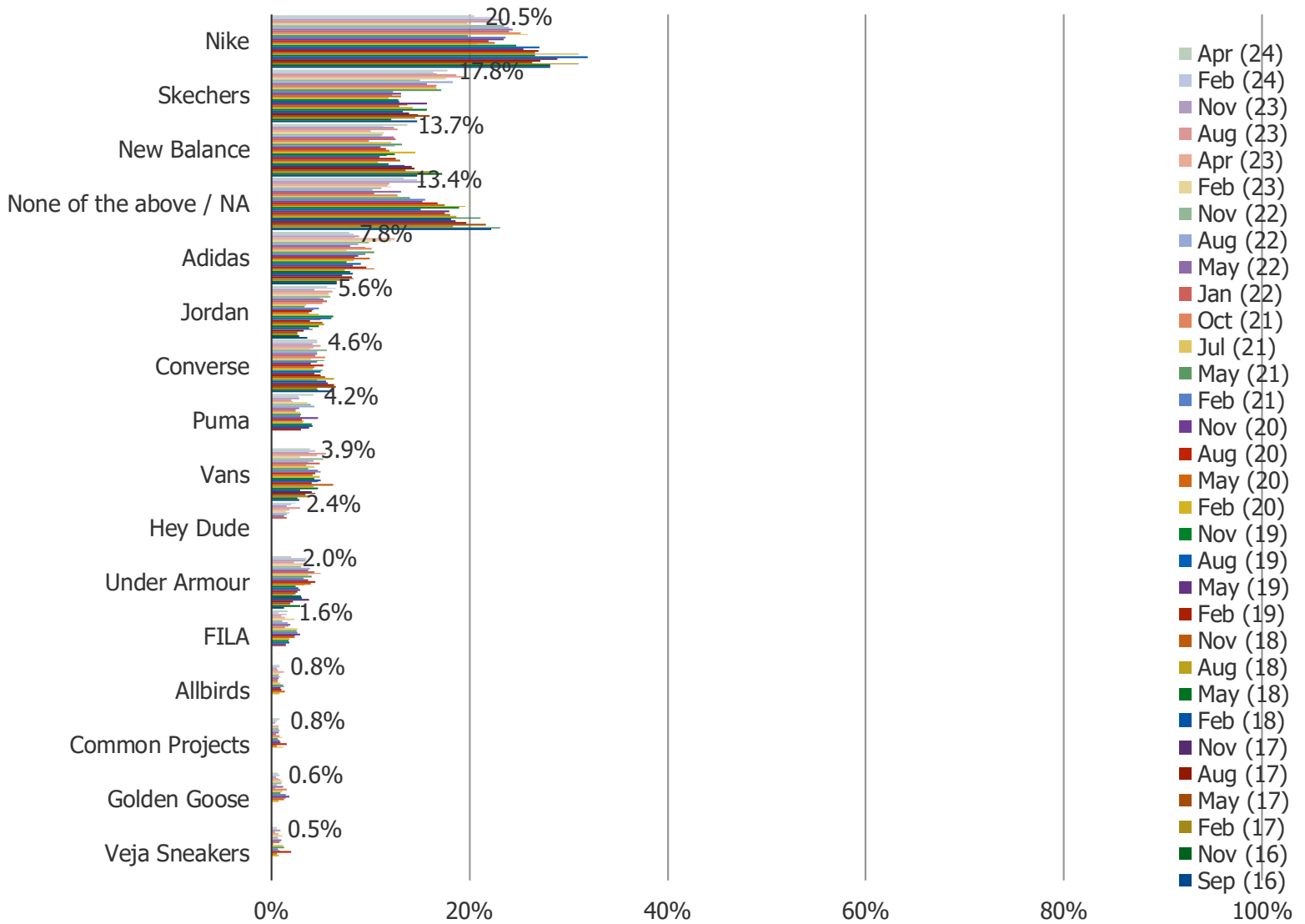
WHICH OF THE FOLLOWING FOOTWEAR BRANDS DO YOU OWN SNEAKERS/FOOTWEAR FROM?

Posed to respondents who said they run for exercise frequently or very frequently (N = 218)



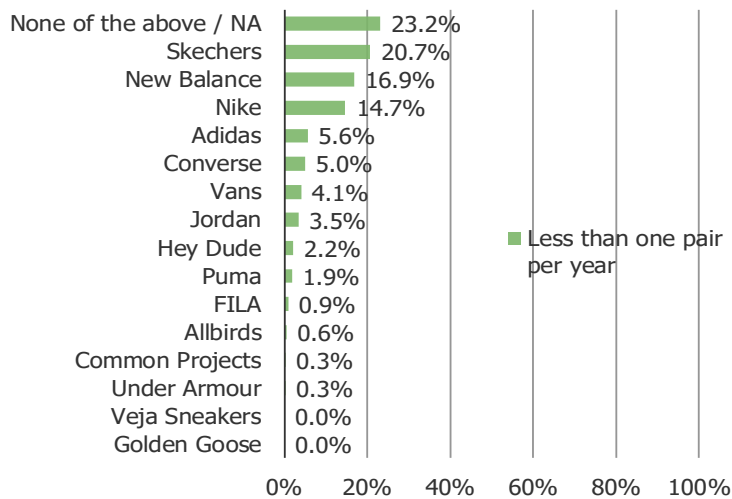
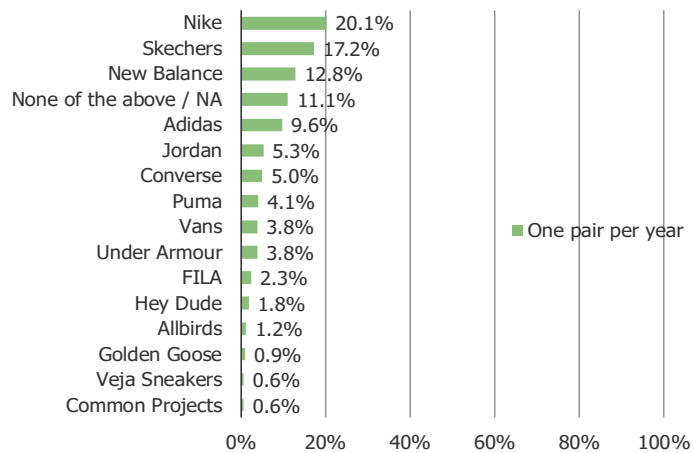
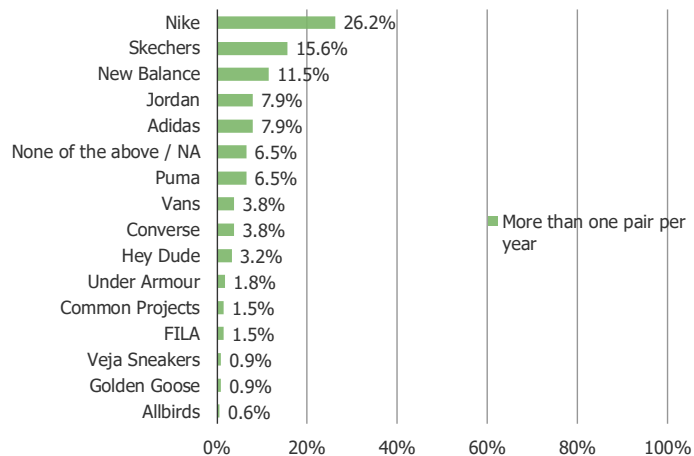
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

Posed to all respondents



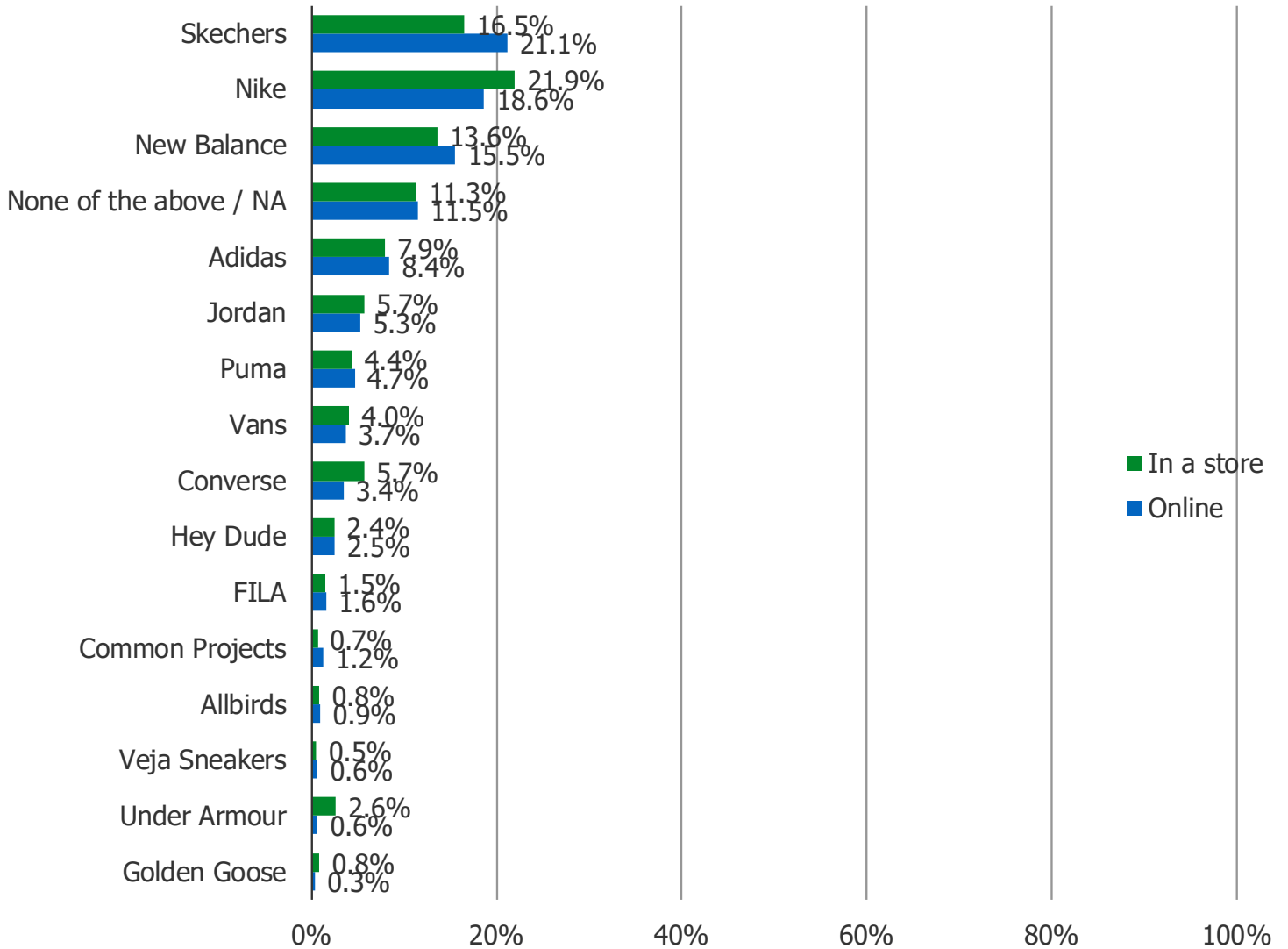
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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



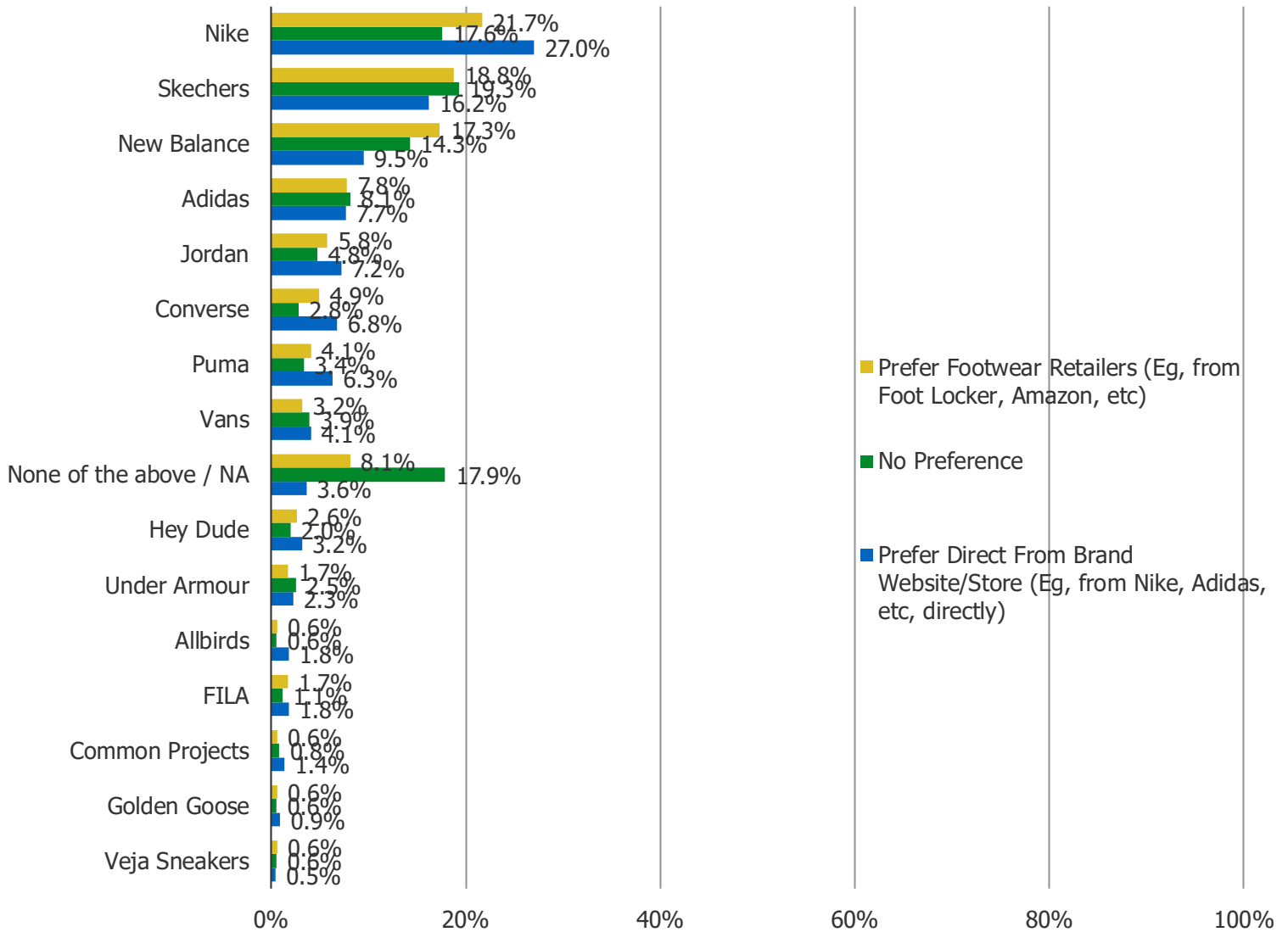
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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



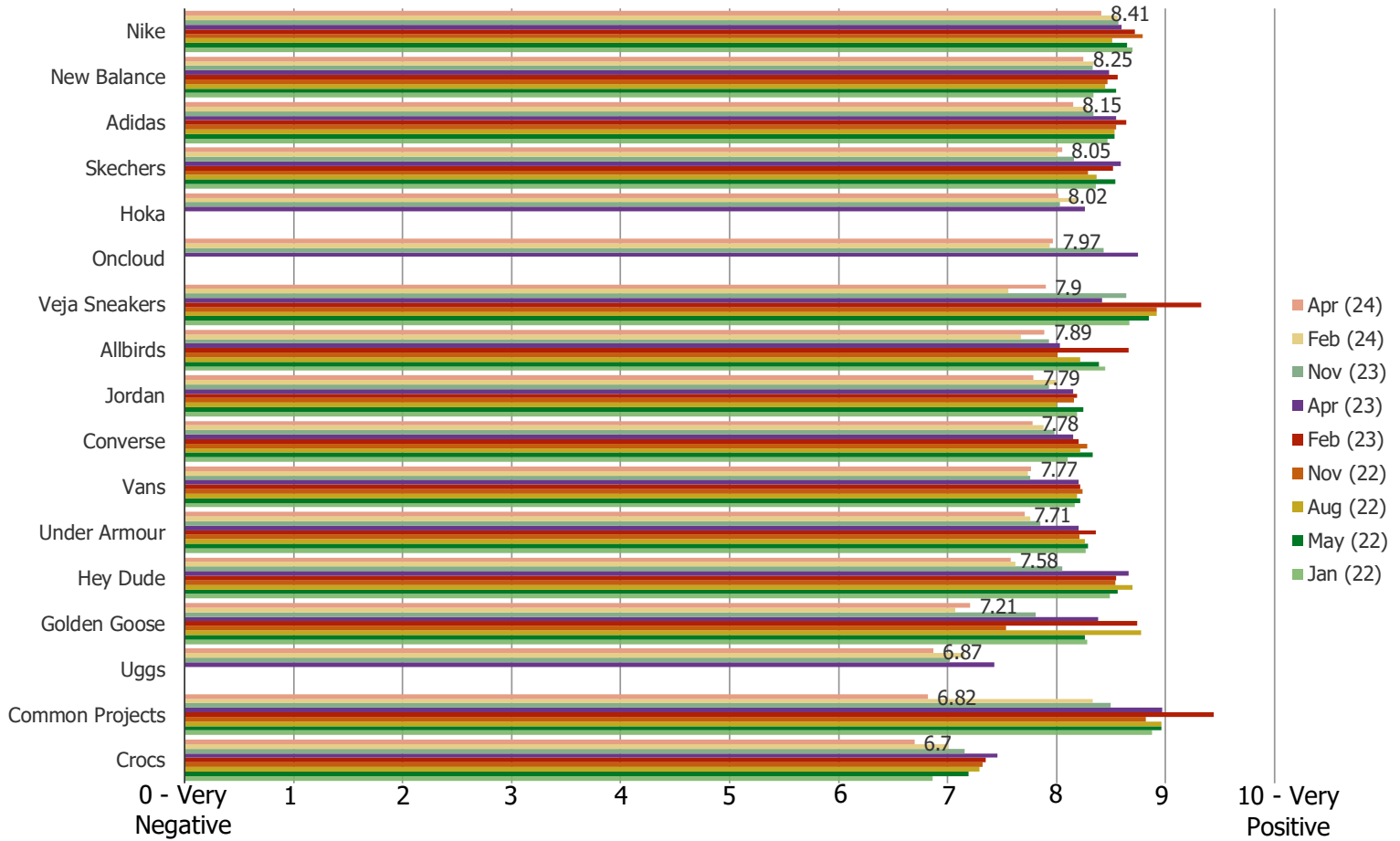
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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?

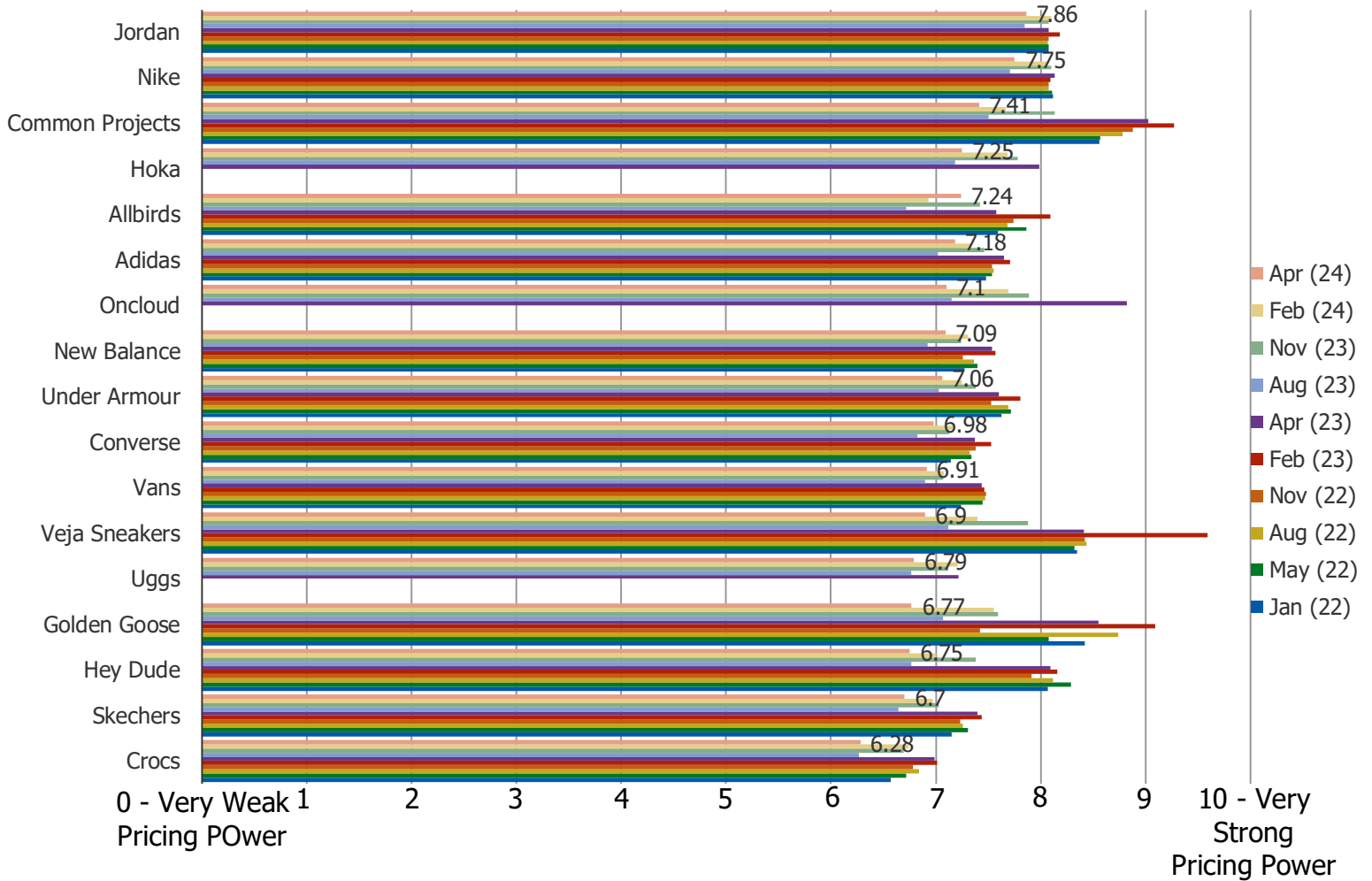
Posed to respondents who have heard of each of the following:



Brand	N=
Adidas	810
Skechers	754
Nike	851
Jordan	674
Under Armour	560
Converse	724
Vans	631
New Balance	722
Common Projects	17
Golden Goose	66
Veja Sneakers	49
Allbirds	90
Hey Dude	237
Crocs	704
Hoka	196
Oncloud	71
Uggs	629

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?

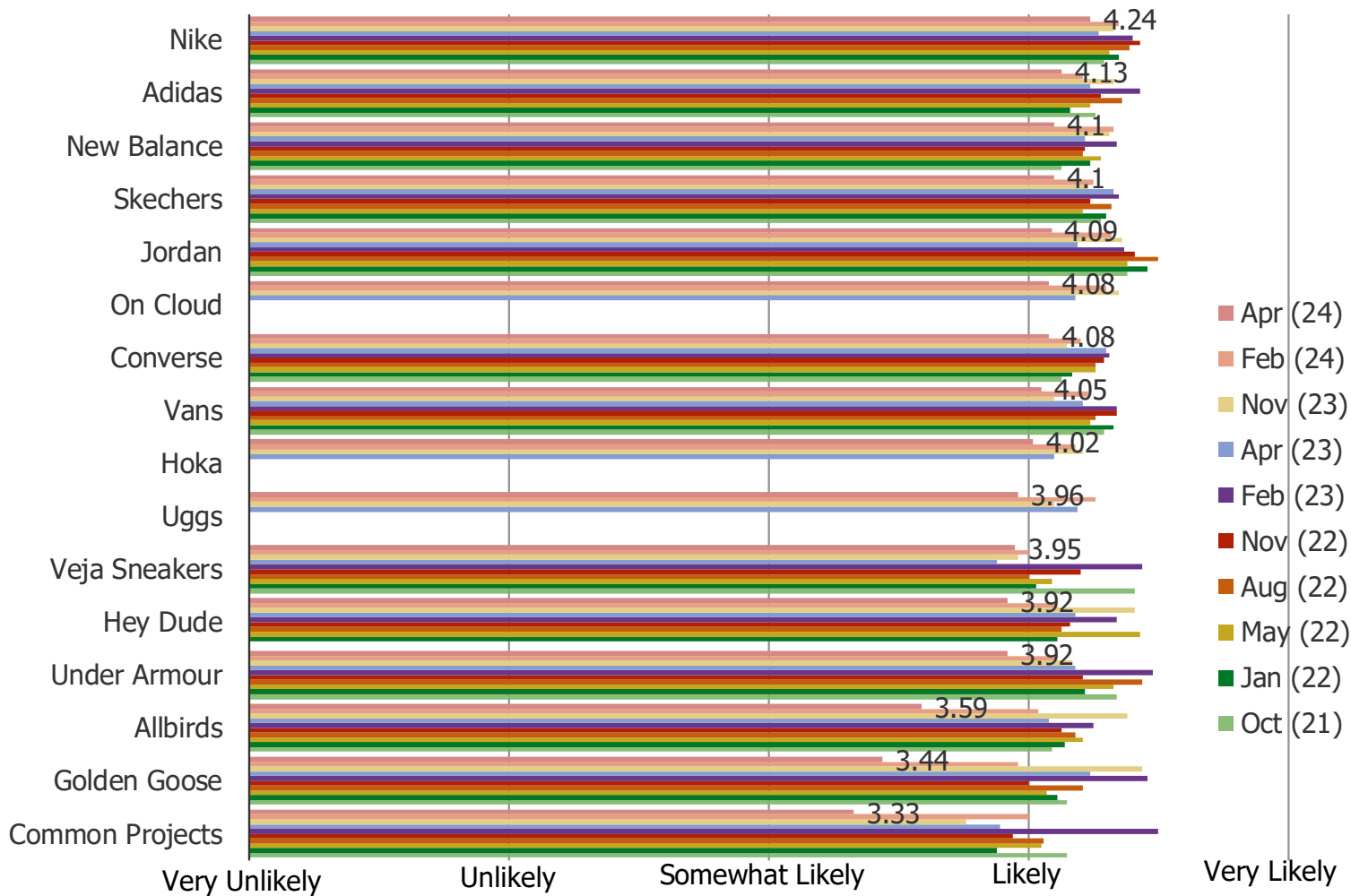
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Hoka	196
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Uggs	629

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.

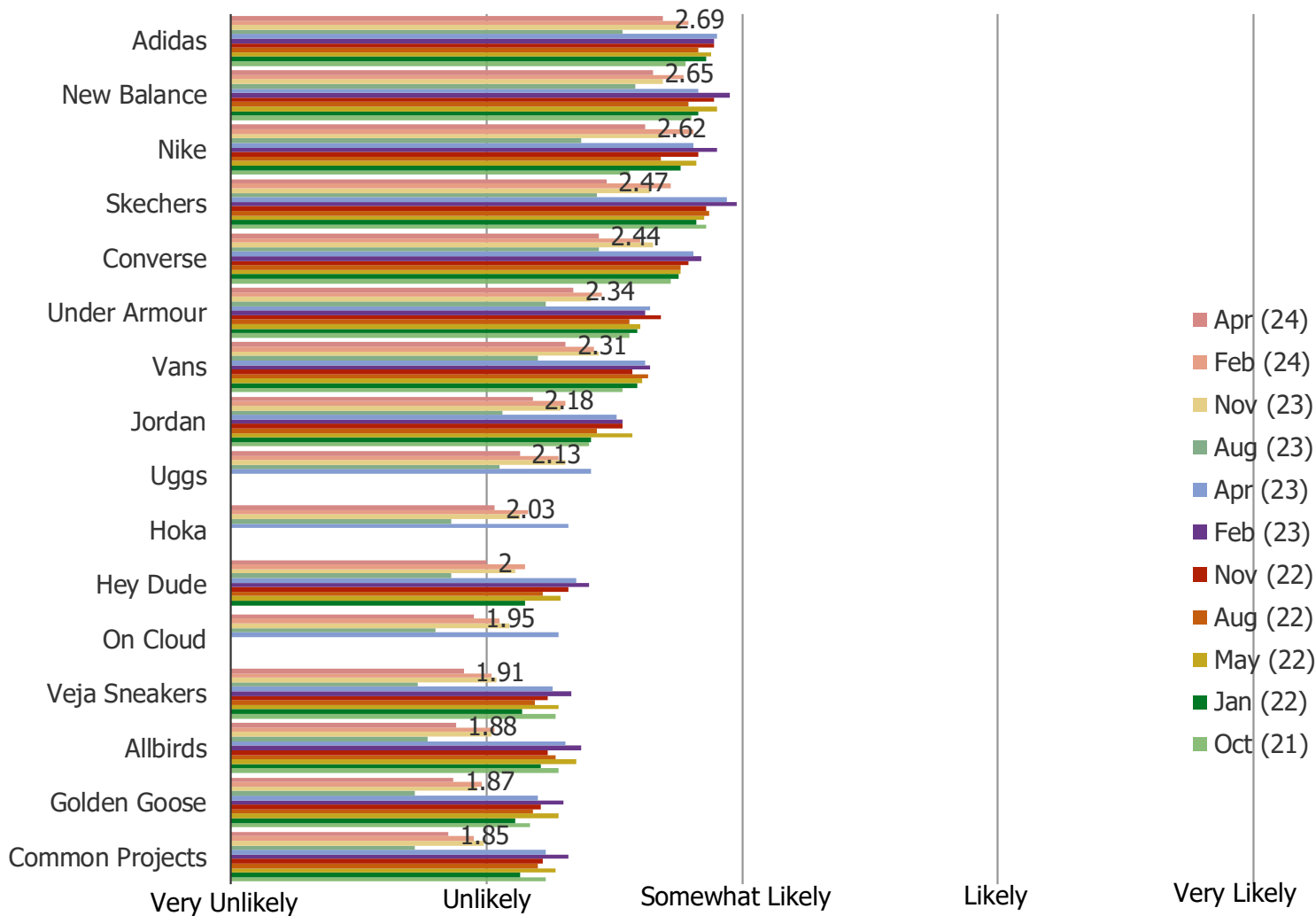


	N=
Adidas	291
Skechers	319
Nike	458
Jordan	152
Under Armour	93
Converse	200
Vans	169
New Balance	264
Common Projects	9
Golden Goose	25
Veja Sneakers	22
Allbirds	27
Hey Dude	73
Hoka	48
On Cloud	26
Uggs	141



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.

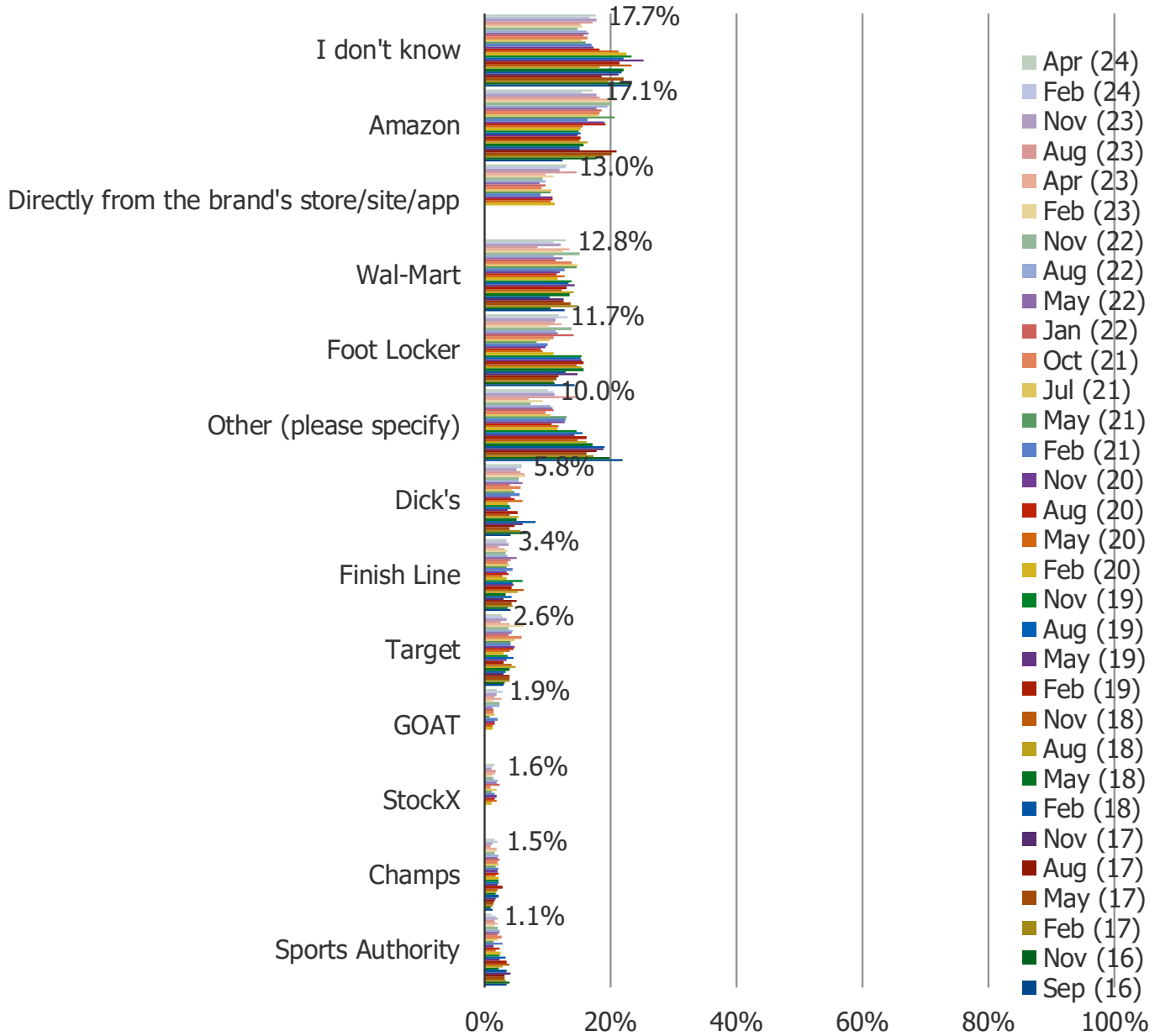


	N=
Adidas	711
Skechers	683
Nike	544
Jordan	850
Under Armour	909
Converse	802
Vans	833
New Balance	738
Common Projects	993
Golden Goose	977
Veja Sneakers	980
Allbirds	975
Hey Dude	929
Hoka	954
On Cloud	976
Uggs	861

## FOOTWEAR RETAILERS

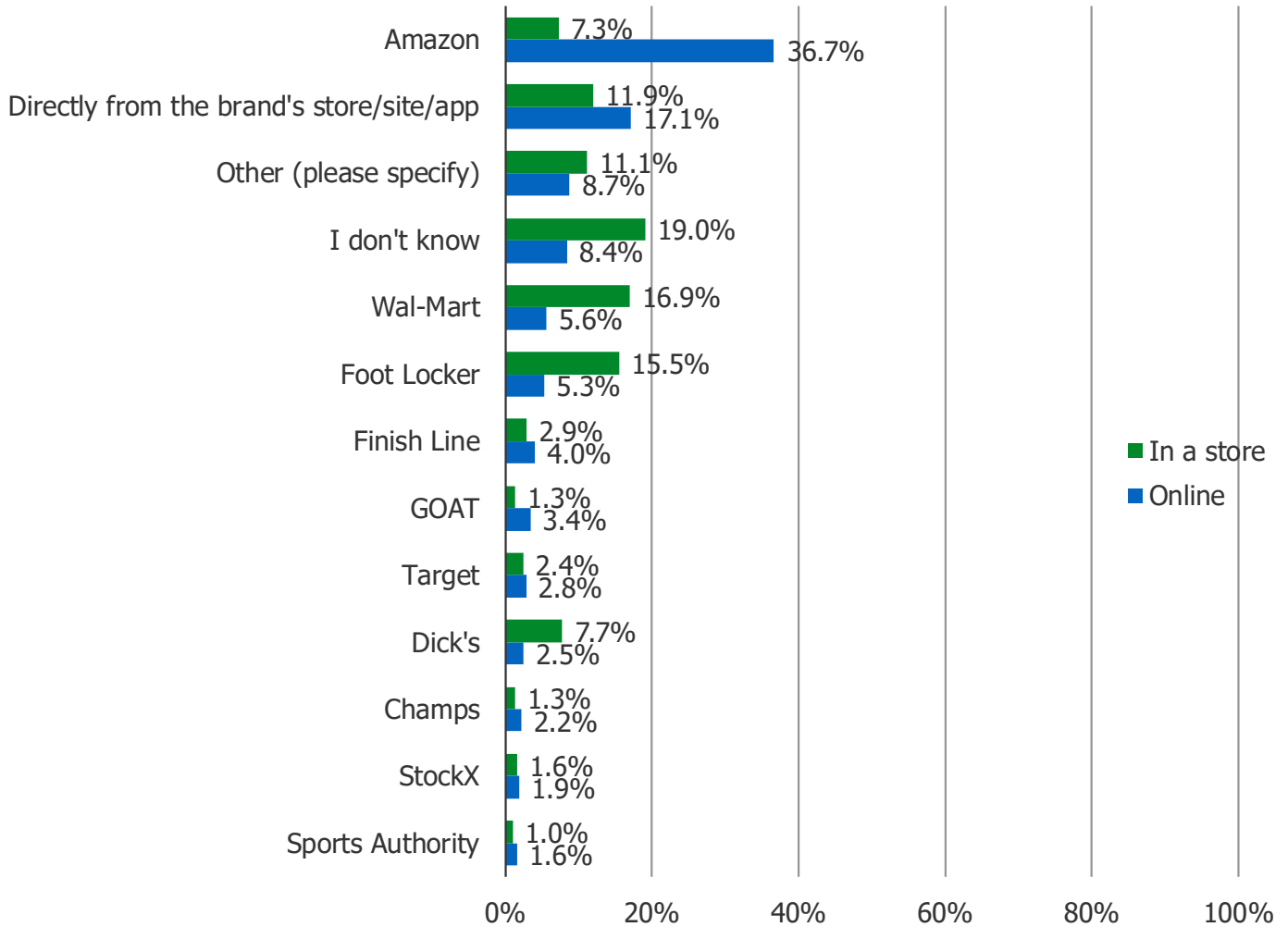
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

Posed to all respondents



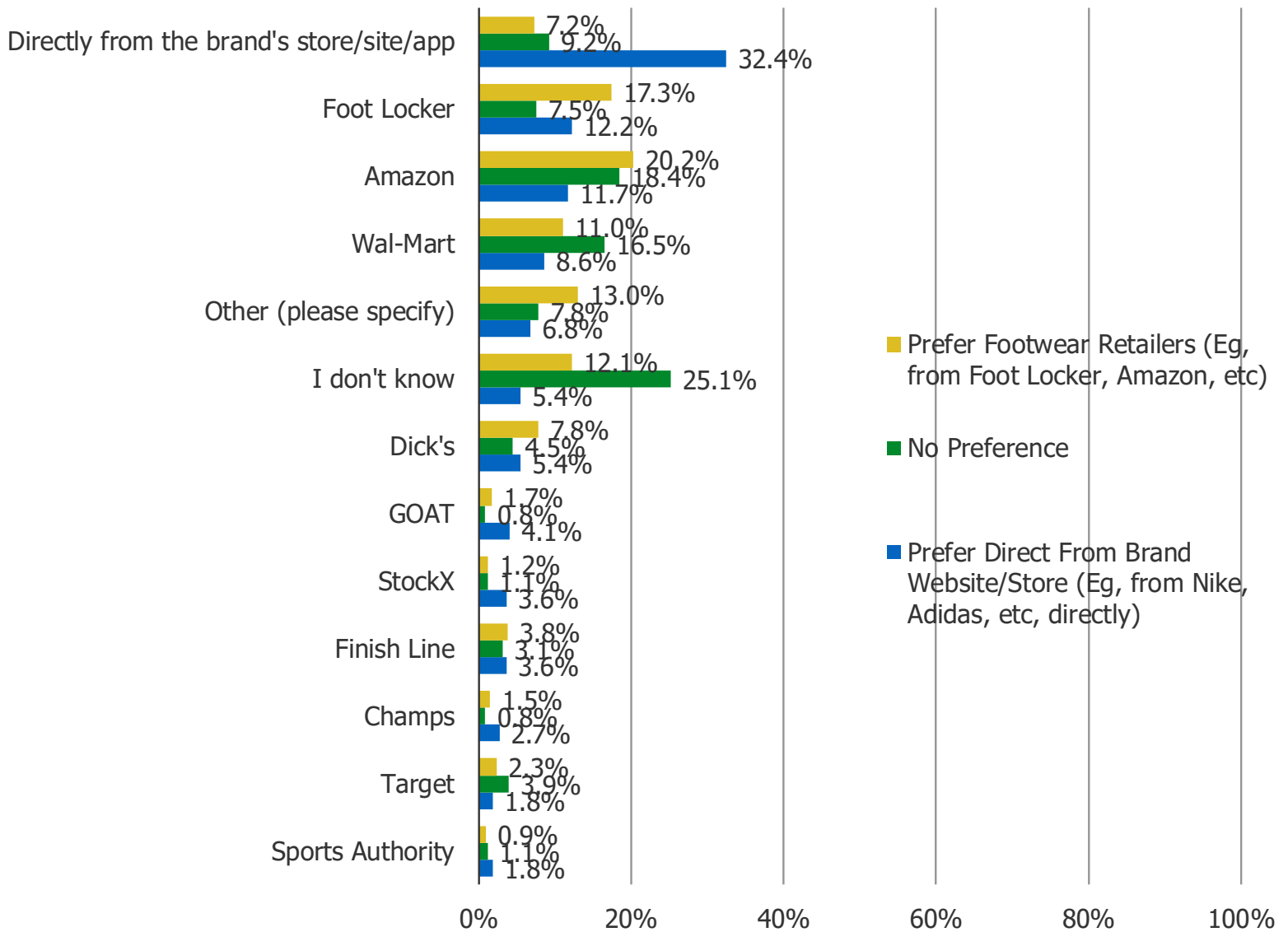
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



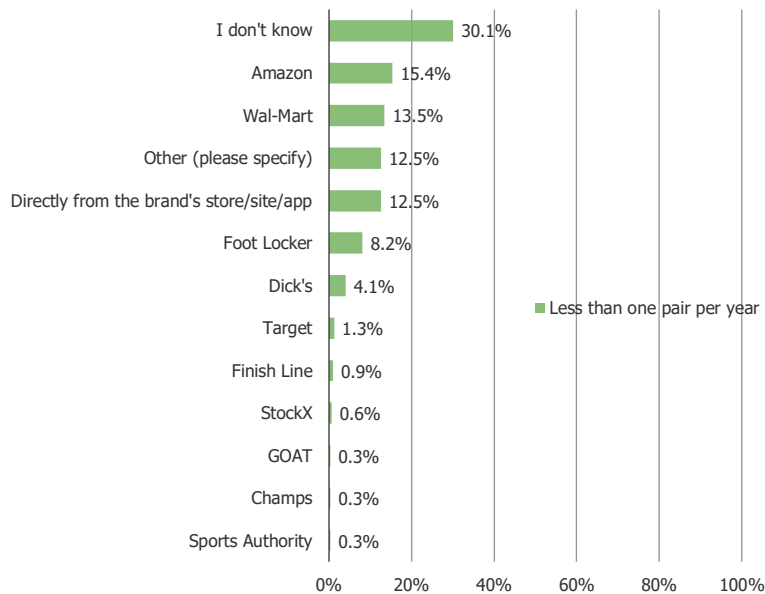
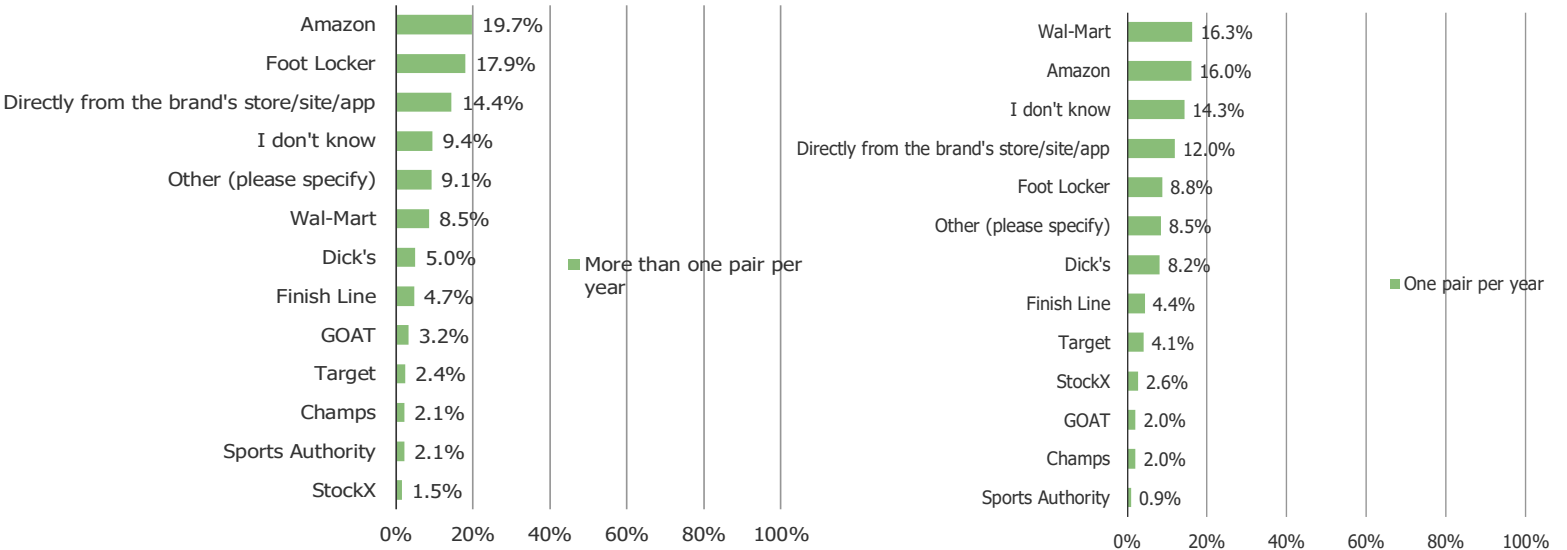
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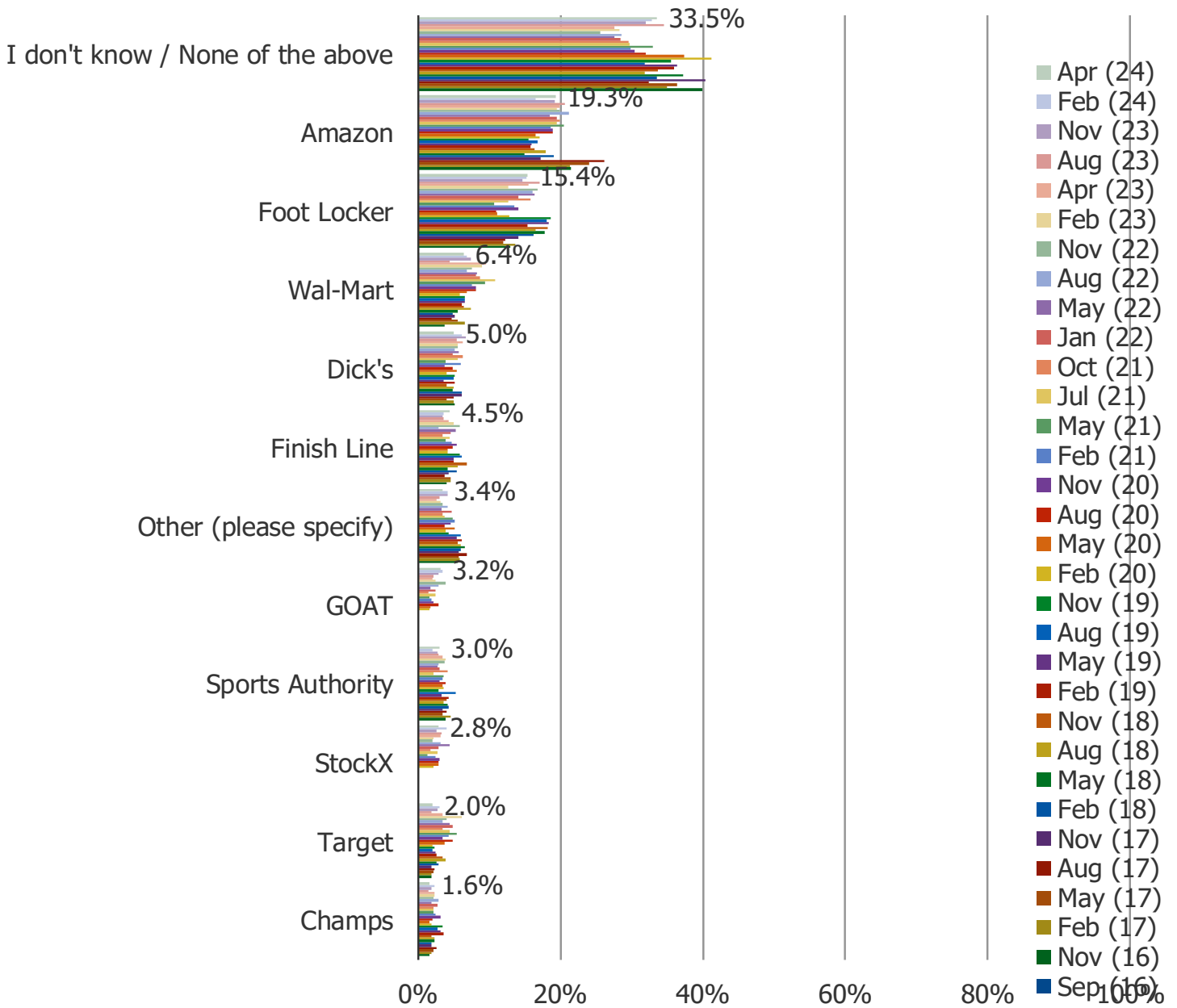
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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

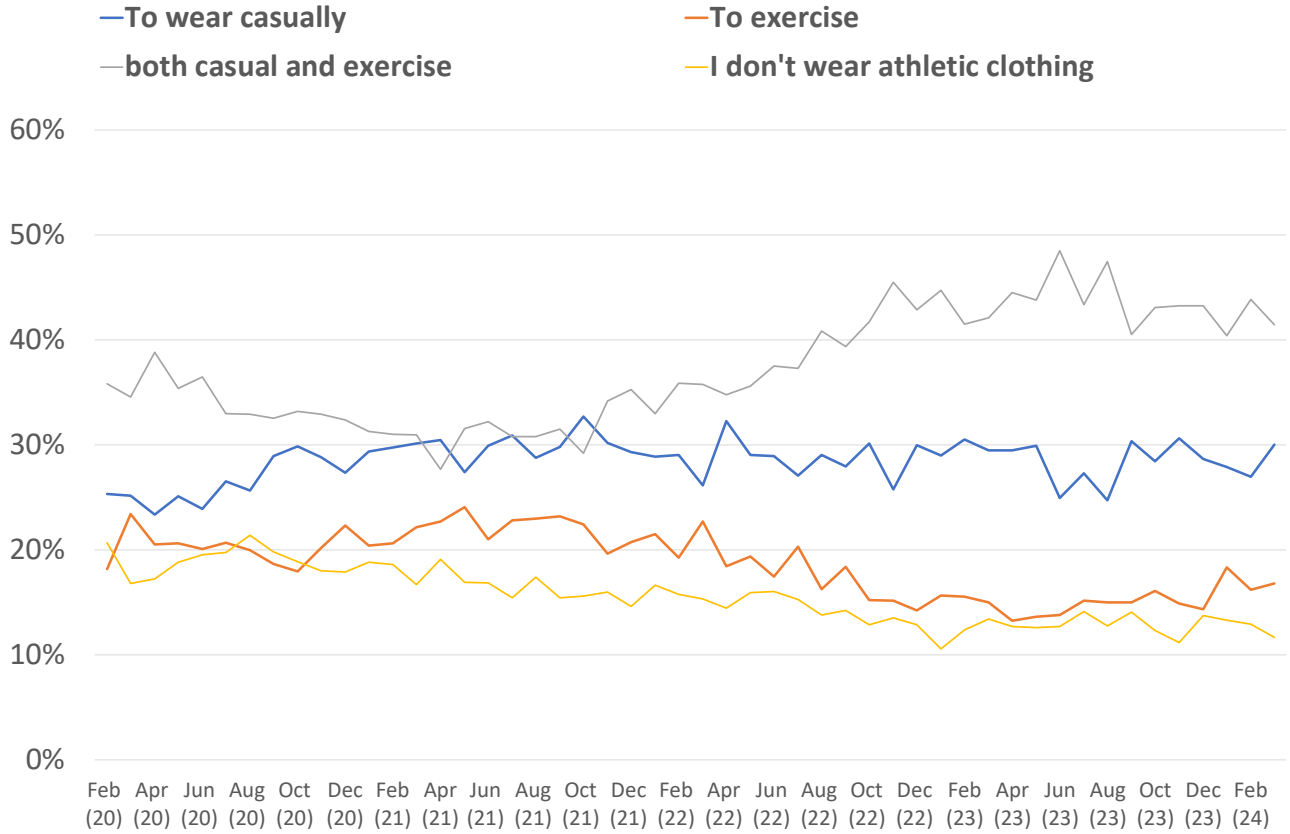


## CASUAL WEAR



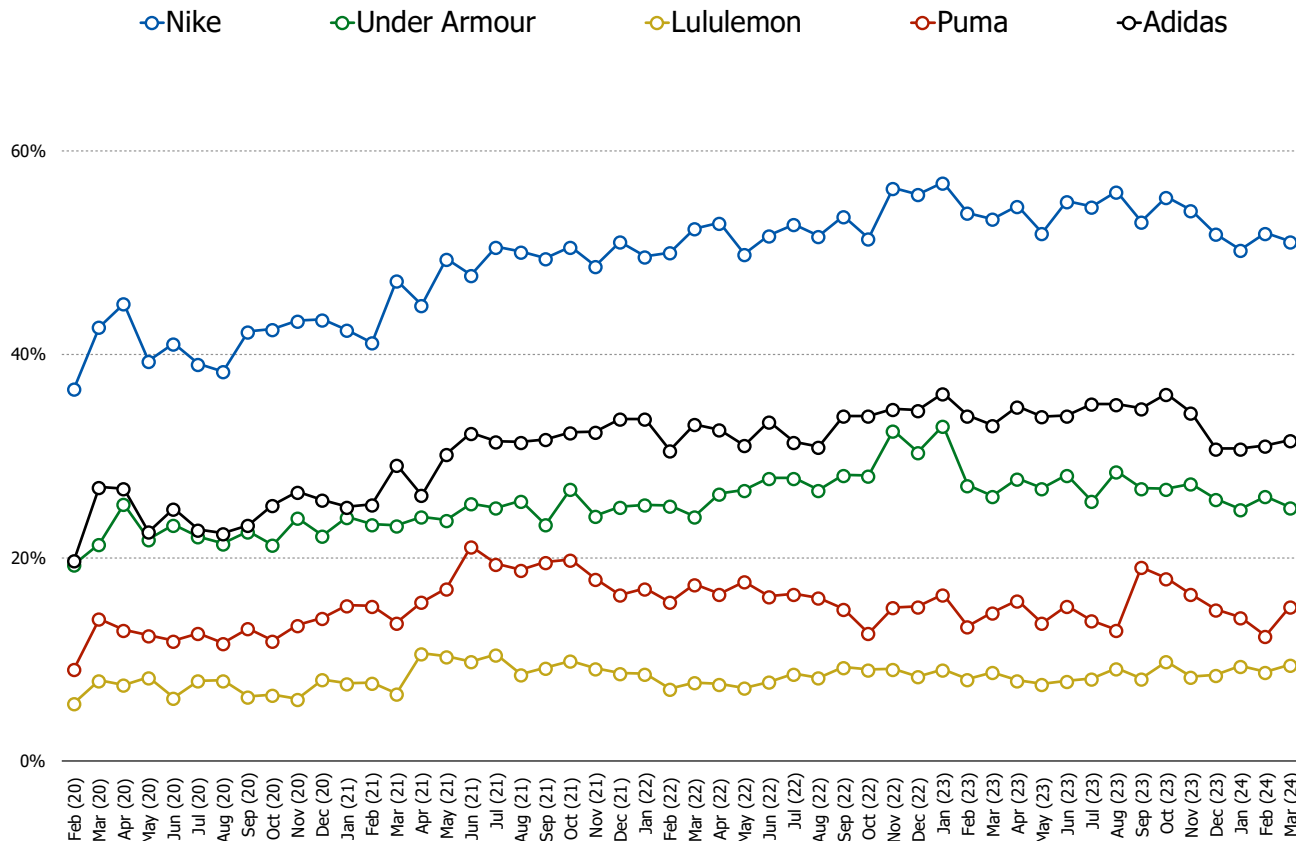
WHAT DO YOU USE ATHLETIC CLOTHING FOR?

Posed to all respondents



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

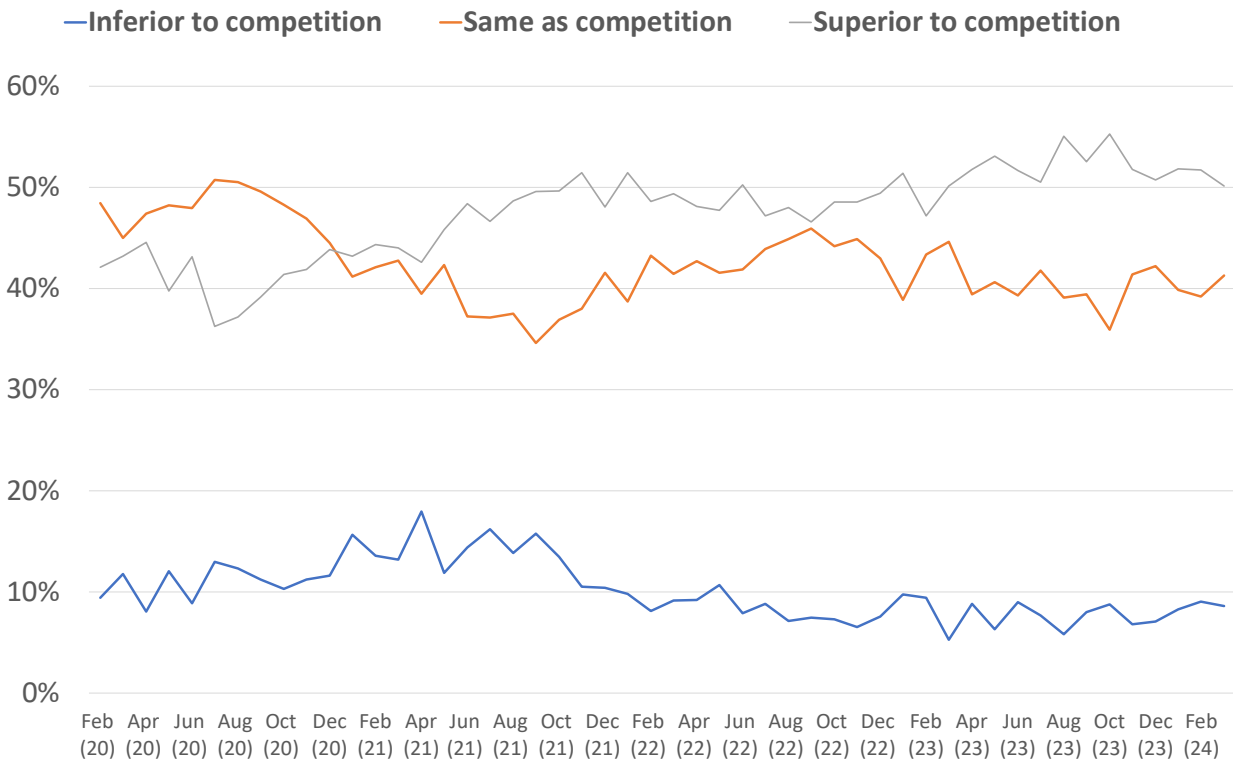
Posed to all respondents



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

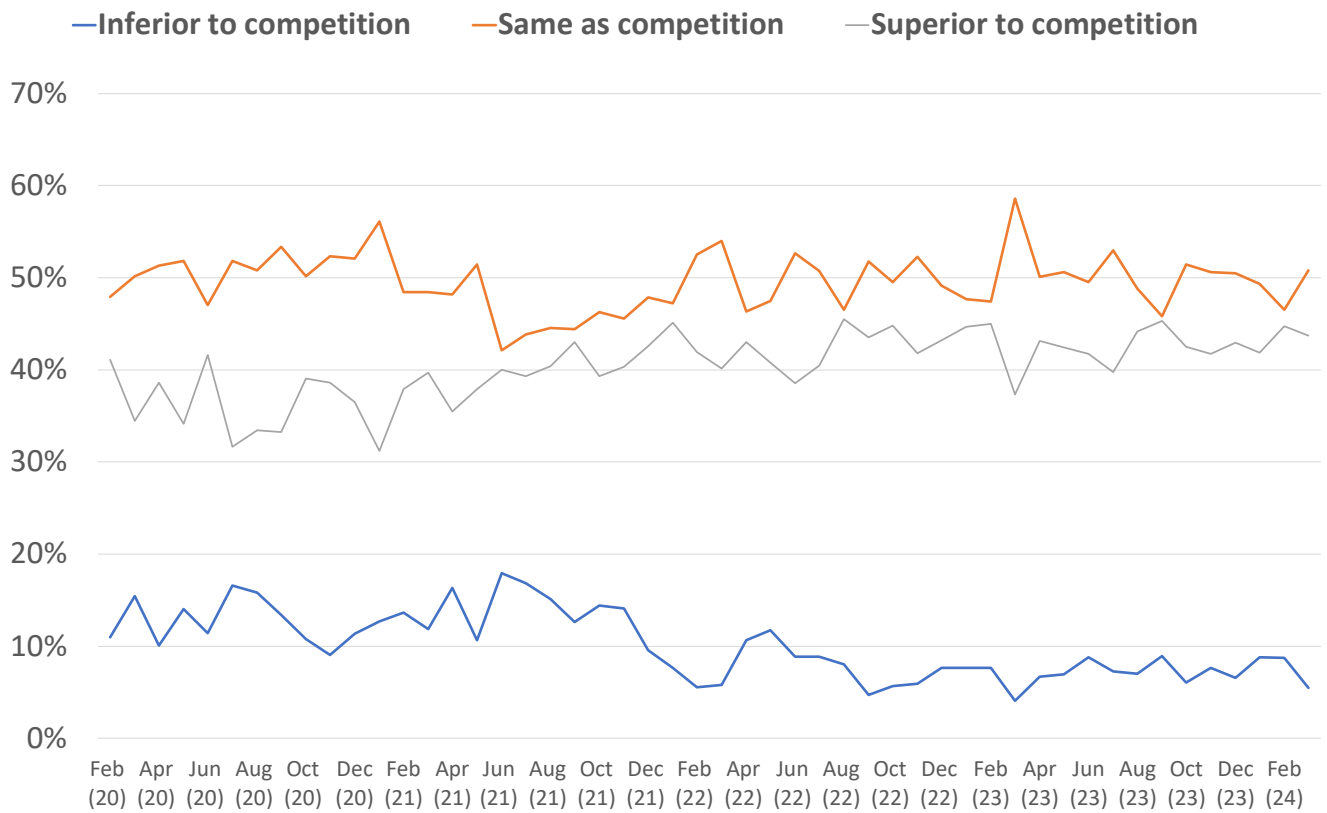
# NIKE



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

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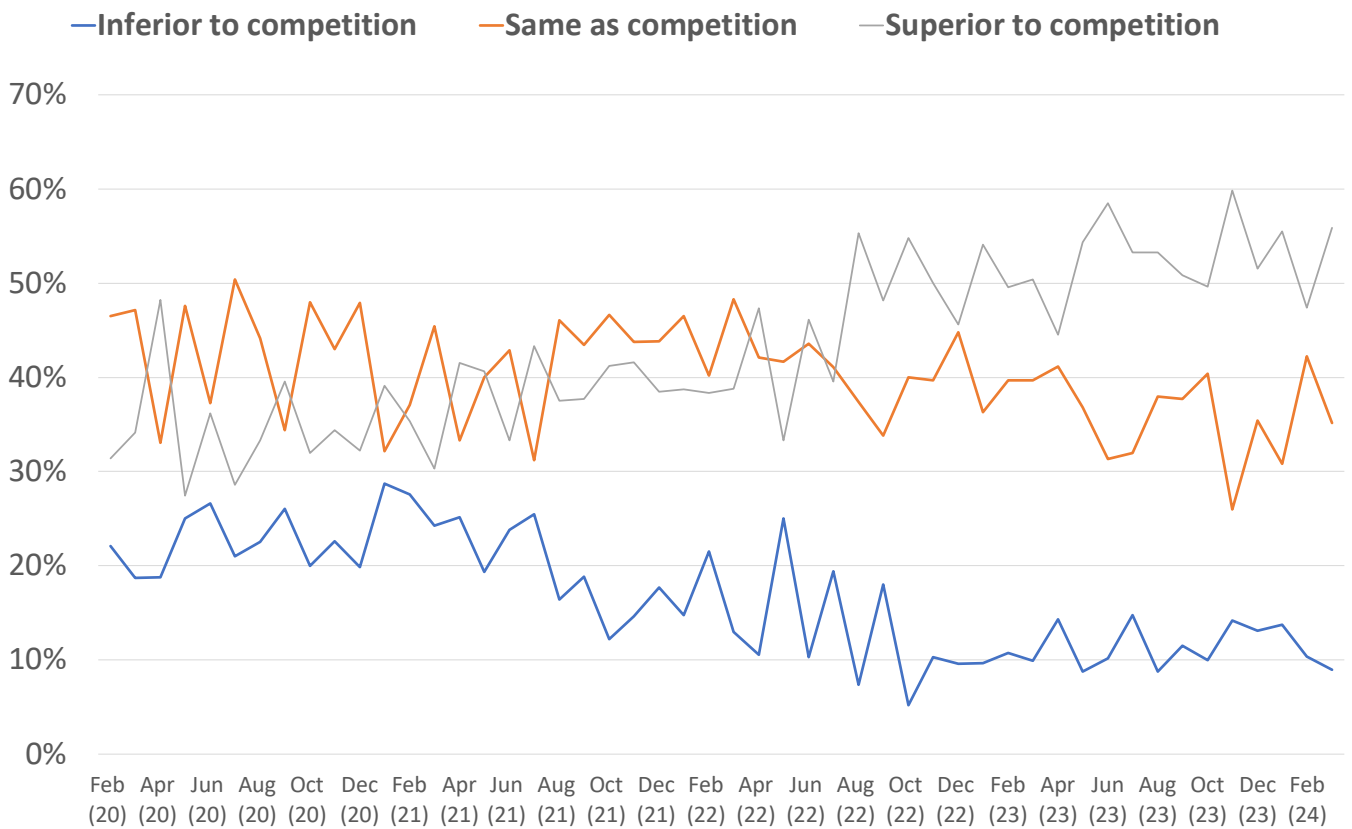
# UNDER ARMOUR



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

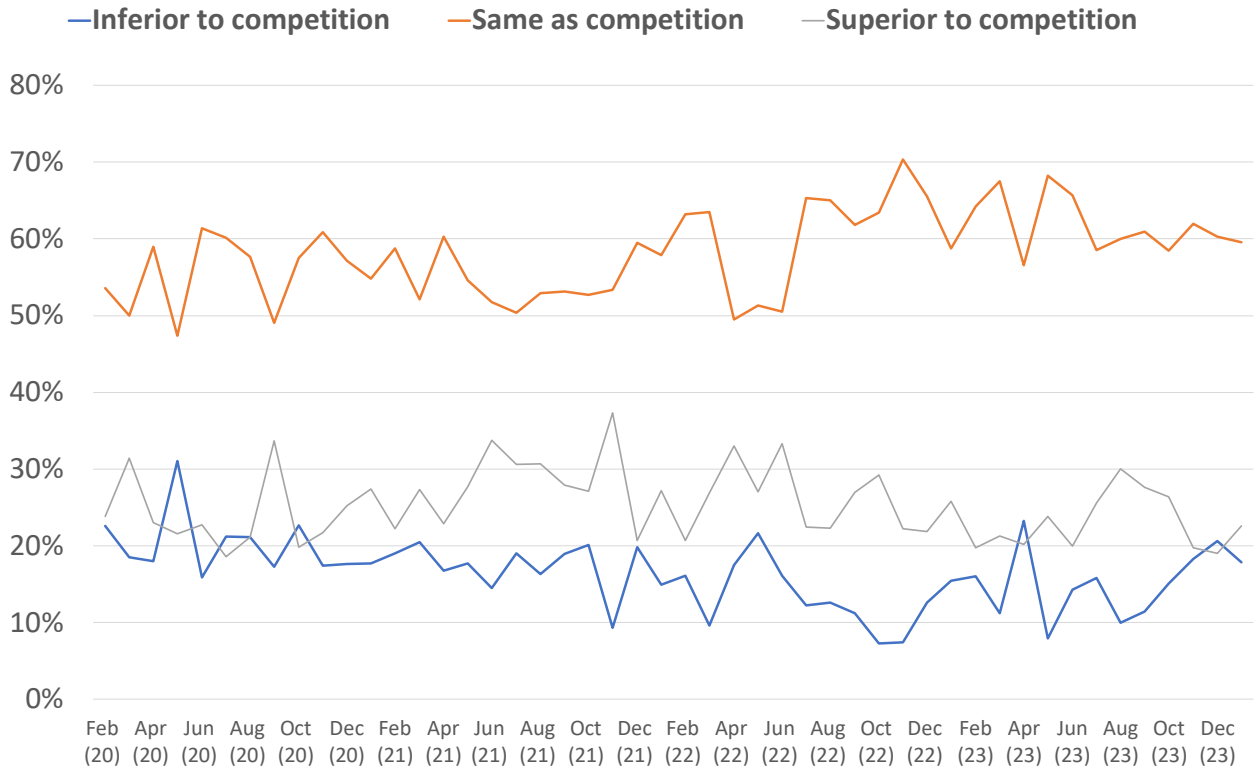
# LULULEMON



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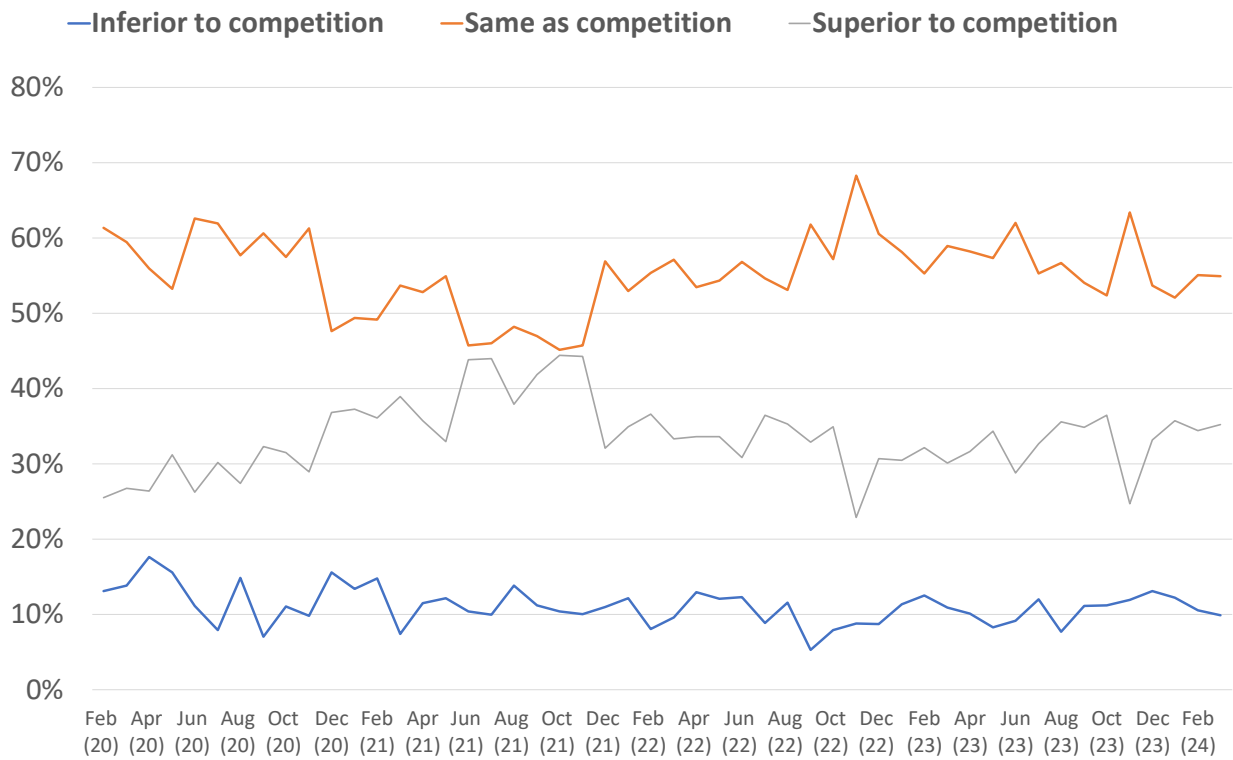
# FILA



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

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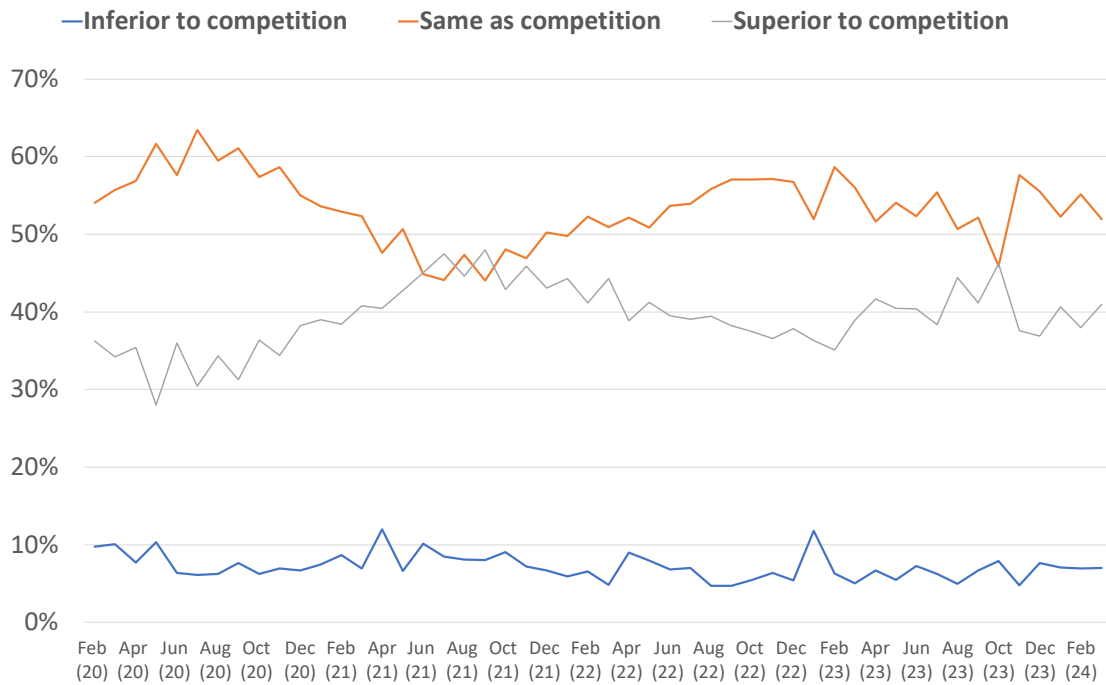
# PUMA



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

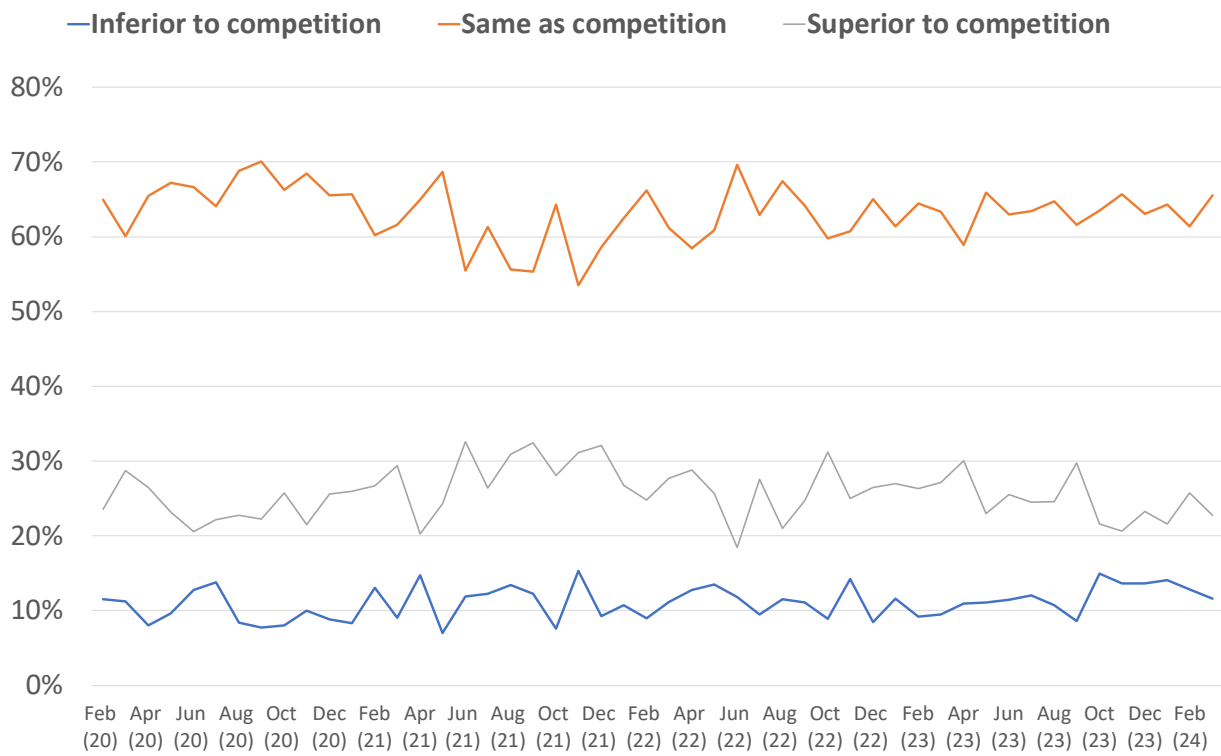




IN YOUR OPINION, HOW DOES THIS BRAND'S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

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

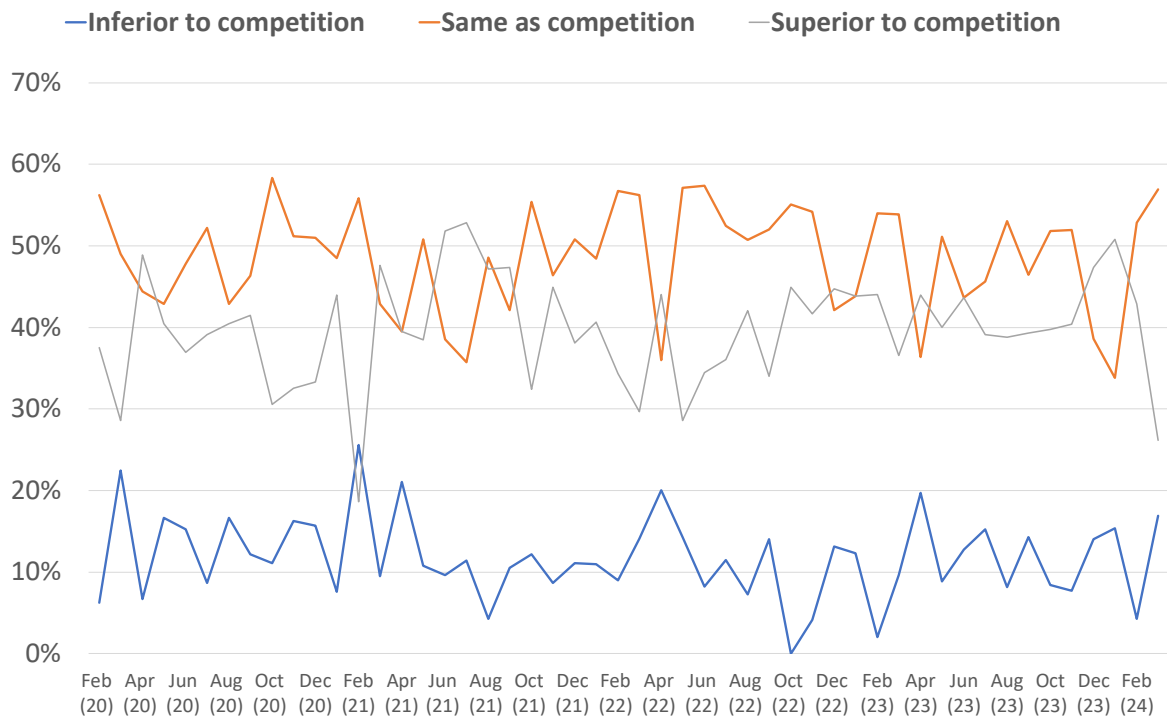
# CHAMPION



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

