

**Bespoke Intel**

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**Sporting Goods  
Consumer Survey, Volume 16**

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**February 2026**

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## **Why Do Customers Choose Dick's and Academy?**

**If You Had To Choose One Sporting Goods Retailer, Which, and Why?**

**Competitive Dynamics**

**Sporting Goods Retail Trends**

## What do you like most about Dick's sporting goods?

Posed to all respondents who have shopped Dick's.

Category	Q1 '24	Q2 '24	Q3 '24	Q4 '24	Q1 '25	Q2 '25	Q3 '25	Q4 '25	Q1 '26	R2	P-Value	Trend
Variety / Wide Selection	45.88%	44.79%	44.25%	46.62%	48.62%	42.01%	43.77%	45.87%	48.86%	0.0386	0.6123	Up
Specific Products/Gear	8.24%	14.67%	10.03%	11.50%	10.12%	11.17%	10.69%	9.64%	10.04%	0.0318	0.646	Down
Price & Value	7.85%	5.92%	8.96%	5.62%	8.02%	6.36%	8.40%	6.34%	7.63%	0	0.9995	Up
Location & Convenience	9.04%	6.05%	6.28%	5.62%	6.57%	5.37%	4.33%	4.82%	5.35%	<b>0.5763</b>	<b>0.0177</b>	Down
Product Quality	4.65%	3.86%	4.55%	5.00%	4.47%	7.64%	6.87%	7.44%	5.76%	<b>0.5293</b>	<b>0.0263</b>	Up
Nothing / Dislike / Unsure	3.86%	3.73%	3.21%	3.50%	2.63%	3.54%	3.31%	3.58%	4.69%	0.0654	0.5065	Up
Customer Service / Staff	2.13%	3.09%	2.94%	2.12%	2.10%	2.83%	2.80%	1.52%	1.87%	0.1959	0.2329	Down
Store Layout/Experience	2.79%	2.57%	2.54%	2.25%	2.50%	2.26%	3.05%	1.10%	2.14%	0.2466	0.1739	Down
Name Brands / Top Brands	1.86%	2.06%	2.14%	2.25%	1.71%	1.13%	1.78%	1.65%	1.87%	0.174	0.2639	Down
Product Availability	0.93%	0.51%	1.07%	0.75%	0.53%	0.85%	0.89%	0.41%	0.54%	0.1821	0.252	Down

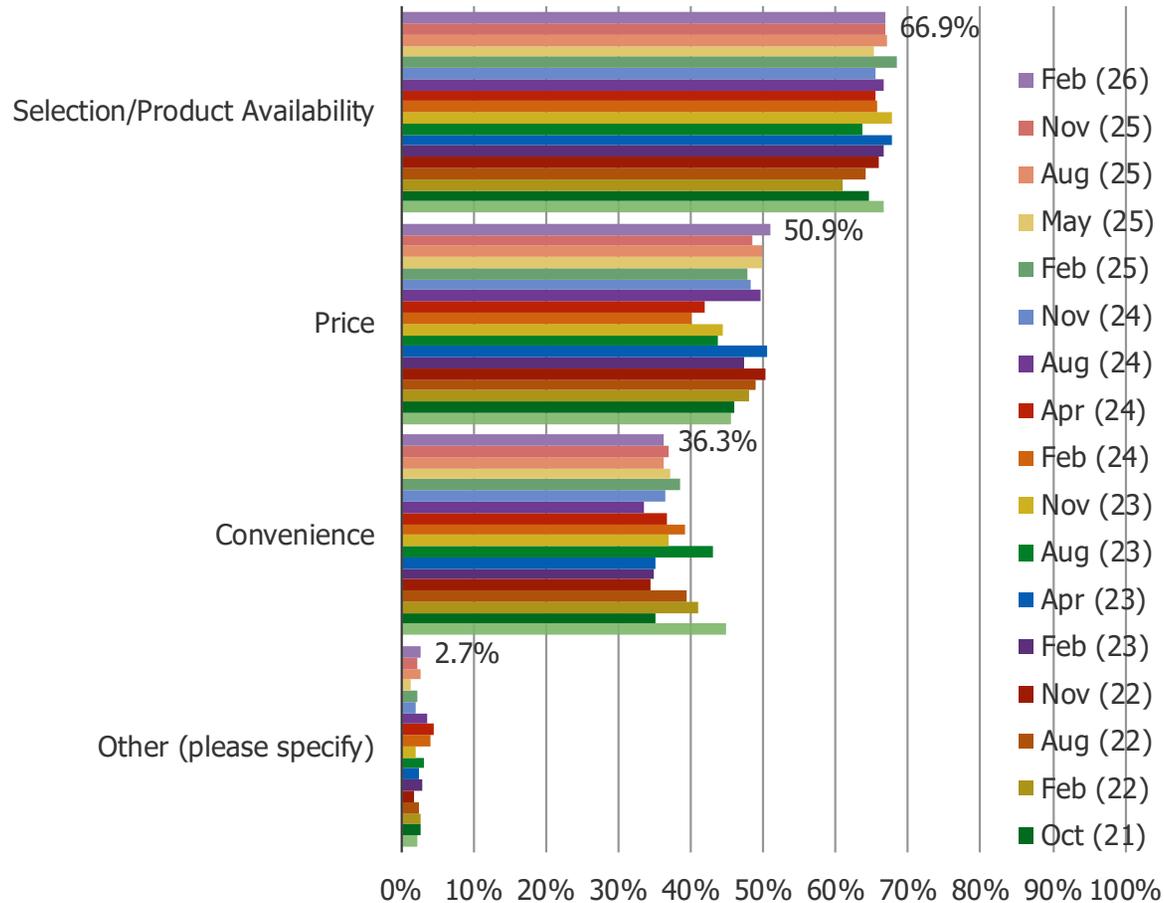
### 3. Key Statistical Findings

1. **The "Variety" Moat:** The primary reason consumers choose Dick's Sporting Goods is overwhelmingly its **Variety and Wide Selection** (~45.6%). This attribute acts as a massive competitive moat and has remained entirely stable across the two-year period analyzed.
2. **Rising Quality Sentiment:** There is a **statistically significant upward trend in respondents citing "Product Quality"** ( $p = 0.0263$ ). The share of respondents praising the durability and make of the products has roughly increased from ~4.6% in early 2024 to ~7% across the latter half of 2025 into 2026.
3. **Declining Convenience Factor:** Conversely, there is a **statistically significant downward trend in respondents citing "Location & Convenience"** ( $p = 0.0177$ ). While it started at 9.04% in Q1 2024, it has steadily eroded to the ~4-5% range. This implies that while shoppers still prefer the brand, proximity and ease of access are becoming less of a driving factor for their loyalty, placing more emphasis on the product quality and selection.

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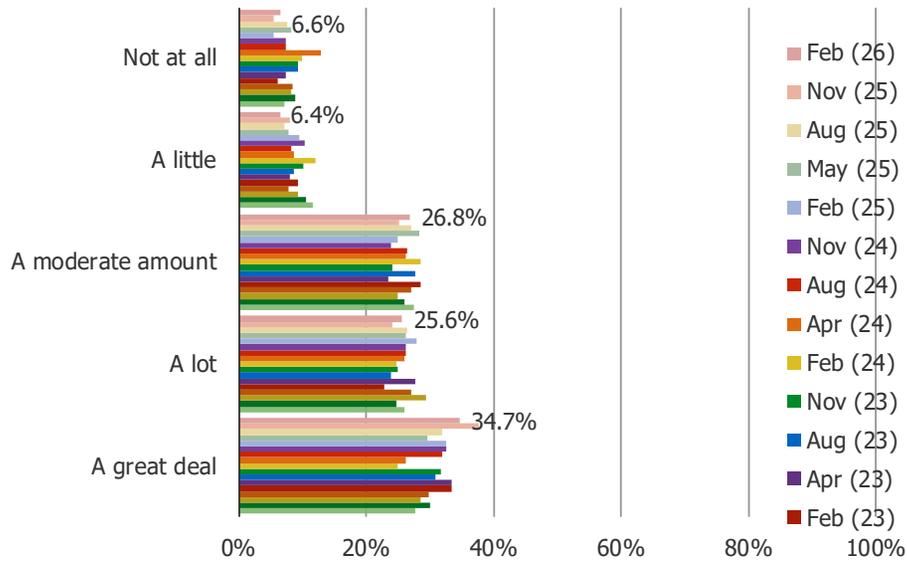
**When you shop Dick's sporting goods, which typically describes why you chose Dick's? (Please select 1-2 choices)**

Posed to all respondents who have shopped Dick's.



## How much of a role do the brands available at Dick's play in your decision to shop at Dick's?

Posed to all respondents who have shopped Dick's.



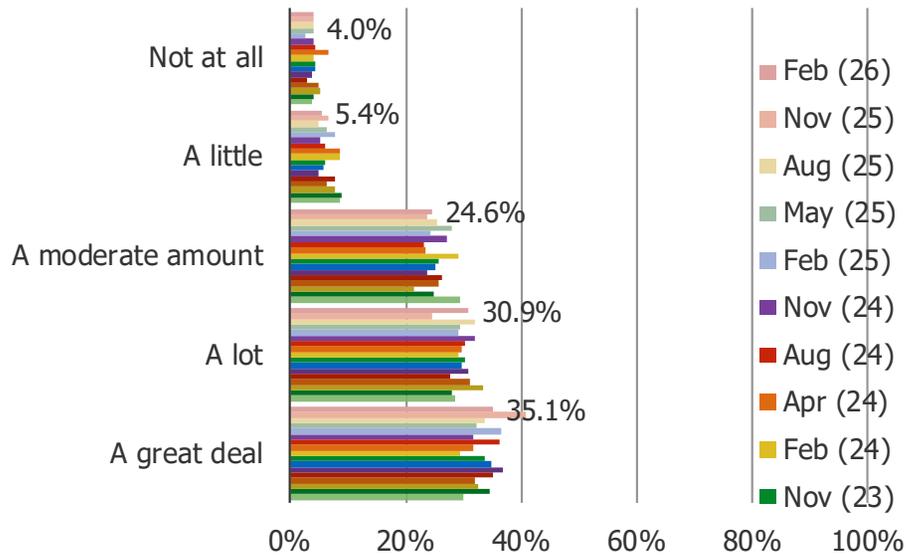
### 3. Key Findings

- The "Big Three" Dominance:** Nike is overwhelmingly the most important brand to Dick's customers, cited by roughly **45.5%** of all respondents. It is followed by **Adidas** (~13.0%) and **Under Armour** (~8.9%). These three brands alone represent the core brand identity for the retailer's customer base.
- Columbia's Decline:** Columbia is the only top-tier brand showing a **statistically significant downward trend** ( $p = 0.0465$ ). Mentions of the brand as "important" have roughly halved from 4.05% in early 2024 down to 1.39% in early 2026.
- Overall Stability:** Despite minor quarter-to-quarter fluctuations (such as Adidas dropping to 9.16% in Q4 2024 before rebounding, or Nike spiking to 51% in Q1 2025), the brand hierarchy is incredibly stable. The lack of statistical significance across 14 of the 15 top brands proves that customer brand loyalty at Dick's is firmly entrenched.

Brand	Q1 '24	Q2 '24	Q3 '24	Q4 '24	Q1 '25	Q2 '25	Q3 '25	Q4 '25	Q1 '26	R2	P-Value	Trend
Nike	45.05%	46.30%	41.96%	45.03%	51.01%	39.52%	47.17%	44.69%	48.91%	0.0424	0.5952	Up
Adidas	14.64%	12.61%	12.61%	9.16%	13.97%	13.01%	15.18%	15.71%	9.90%	0.0002	0.9727	Down
Under Armour	8.33%	8.26%	10.00%	7.99%	8.91%	7.95%	9.92%	11.50%	6.93%	0.0167	0.7407	Up
The North Face	4.05%	3.26%	1.74%	2.92%	2.63%	1.69%	4.66%	2.65%	2.97%	0.0054	0.8509	Down
Columbia	4.05%	2.61%	2.17%	1.95%	1.62%	1.20%	2.83%	1.55%	1.39%	<b>0.4544</b>	<b>0.0465</b>	Down
New Balance	2.48%	2.39%	1.96%	2.34%	2.02%	2.89%	1.01%	2.43%	1.98%	0.0773	0.4688	Down
Puma	0.90%	2.61%	2.61%	1.36%	0.81%	0.96%	2.23%	3.54%	1.78%	0.0619	0.5187	Up
Reebok	1.13%	2.17%	2.39%	1.36%	0.81%	2.17%	2.02%	1.33%	1.78%	0.0002	0.9737	Up
Champion	2.03%	1.52%	2.61%	1.75%	1.01%	1.20%	1.01%	1.55%	1.98%	0.1114	0.38	Down
Wilson	0.90%	1.30%	2.17%	0.78%	1.42%	1.45%	1.82%	1.77%	0.79%	0.0074	0.826	Up
Carhartt	0.90%	1.52%	0.65%	0.97%	0.81%	1.20%	0.61%	0.66%	1.58%	0.0014	0.9247	Up
Yeti	0.68%	0.43%	0.43%	1.95%	1.01%	0.96%	1.01%	1.11%	0.20%	0.0006	0.9509	Up
Brooks	1.13%	0.65%	0.65%	0.97%	0.81%	0.48%	1.42%	0.88%	0.59%	0.0037	0.8764	Down
Coleman	1.13%	0.65%	0.87%	1.17%	0.61%	0.00%	0.81%	0.66%	0.79%	0.1194	0.3623	Down
Stanley	0.90%	0.43%	0.00%	0.78%	1.21%	0.72%	0.81%	0.66%	0.99%	0.1173	0.3668	Up

## How much of a role do the types of products available at Dick's play in your decision to shop at Dick's?

Posed to all respondents who have shopped Dick's.



### Key Insights: The "Lifestyle Shift"

- The Decline of "Hard" Goods:** There is a statistically significant decline ( $p = 0.0216$ ) in consumers citing **General Sports Equipment** (bats, balls, fitness gear, weights) as their reason for visiting. It has dropped from nearly 34% in early 2024 to 28.5% today. This suggests Dick's is becoming less of a "utility" destination for basic gear.
- The Rise of "Sneaker Culture":** **Footwear/Shoes** is trending upward ( $p = 0.0596$ ) and now represents the primary driver for over 21% of the customer base. This is the strongest "growth" category among specific product types.
- "Brand" is the New Product:** A growing number of shoppers (~10.4%) no longer name a product type (like "cleats" or "shirts") but instead name a **Specific Brand** (Nike, Adidas, UA) as the reason they decide to shop. This trend is moving upward ( $p = 0.0509$ ), indicating that brand loyalty to partners is increasingly more important than the specific product category.
- Stability in Apparel:** **Apparel/Clothing** remains the #2 overall driver (~25.2% average). While it has fluctuated, it remains a pillar of the visit, though it hasn't shown the same upward momentum as Footwear.
- The "Niche" Anchor:** **Fishing, Hunting, and Camping** collectively drive about 15% of visits. These categories are remarkably stable, showing no significant growth or decline, which suggests they represent a dedicated, consistent "enthusiast" base that is insulated from the broader shifts in apparel and footwear.

Category	2023Q4	2024Q1	2024Q2	2024Q3	2024Q4	2025Q1	2025Q2	2025Q3	2025Q4	2026Q1	R2	P-Value	Trend
General Sports Equipment	32.88%	33.96%	33.13%	31.70%	30.38%	30.00%	29.79%	31.63%	32.09%	28.49%	0.5032	0.0216	Down
Apparel / Clothing	26.35%	25.58%	23.75%	25.28%	24.59%	27.17%	24.38%	27.24%	25.47%	22.53%	0.0487	0.54	Down
Footwear / Shoes	19.14%	21.59%	21.36%	20.00%	20.61%	21.51%	20.42%	22.67%	21.95%	21.79%	0.3755	0.0596	Up
Top Brands (Nike/Adidas/UA)	7.88%	9.85%	11.18%	8.30%	10.85%	10.94%	10.83%	11.88%	10.56%	10.99%	0.3969	0.0509	Up
Fishing & Hunting	8.11%	9.01%	7.78%	10.00%	5.42%	6.60%	8.12%	7.13%	8.28%	8.57%	0.0157	0.7305	Down
Camping & Outdoors	7.21%	5.87%	7.39%	7.36%	7.41%	7.74%	6.67%	6.95%	6.00%	7.26%	0.0055	0.839	Down
Golf Equipment	3.83%	4.40%	3.99%	2.83%	3.62%	3.02%	2.50%	4.02%	4.76%	3.35%	0.0069	0.8201	Down
Other Brands (Yeti, Stanley)	3.38%	2.52%	3.99%	4.72%	3.25%	3.40%	1.67%	3.84%	2.48%	2.23%	0.1631	0.2471	Down

## What do you like most about Academy Sports and Outdoors?

Posed to all respondents who have shopped Academy.

Category	23Q4	24Q1	24Q2	24Q3	24Q4	25Q1	25Q2	25Q3	25Q4	26Q1	R2	P-Value
Variety / Selection	19.80%	25.00%	31.70%	30.30%	27.20%	30.10%	24.50%	29.50%	28.40%	38.50%	0.3792	0.058
Price & Value	14.10%	19.80%	18.90%	17.30%	15.60%	18.20%	16.20%	19.30%	19.30%	16.90%	0.0487	0.5402
Location / Convenience	10.20%	14.30%	9.70%	9.50%	10.90%	8.40%	11.20%	4.90%	6.00%	6.20%	<b>0.5646</b>	<b>0.0122</b>
Quality	2.50%	2.80%	2.70%	2.00%	5.60%	2.80%	7.60%	8.20%	8.10%	4.20%	<b>0.4775</b>	<b>0.0269</b>

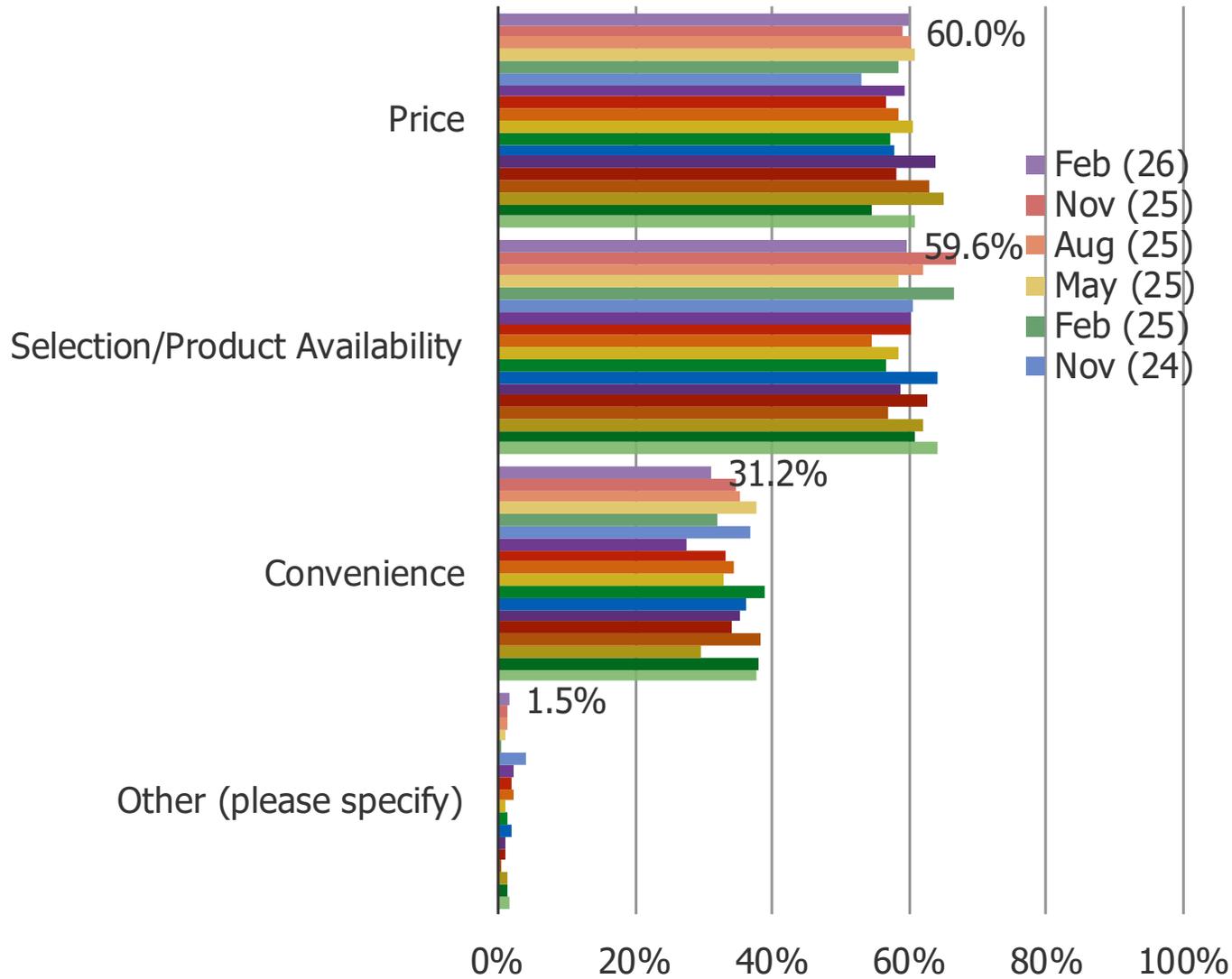
### Key Takeaways for Academy Sports + Outdoors

- The "Quality" Shift:** The most statistically significant movement in the dataset is the rising importance of "Quality" ( $p = 0.0269$ ). Respondents are naming durability and product make as a reason for their loyalty at nearly triple the rate seen in 2023.
- Convenience Erosion:** There is a significant decline ( $p = 0.0122$ ) in people choosing Academy based on **Location/Convenience**. While it was a primary driver for 14.3% in early 2024, it has dropped to 6.2%, suggesting shoppers are now making more deliberate brand/value-based choices rather than just visiting because it's "close."

N=260

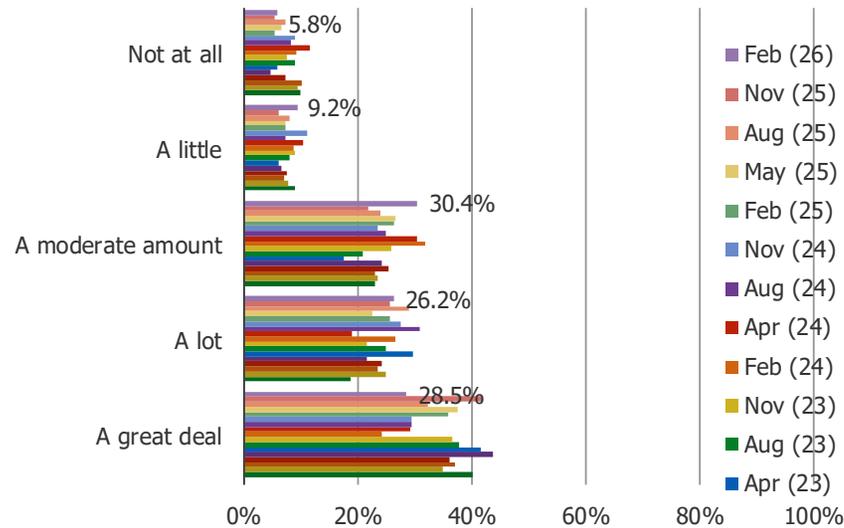
**When you shop Academy Sports and Outdoors, which typically describes why you chose Academy?  
(Please select 1-2 choices)**

Posed to all respondents who have shopped Academy.



### How much of a role do the brands available at Academy play in your decision to shop at Academy?

Posed to all respondents who have shopped Academy.

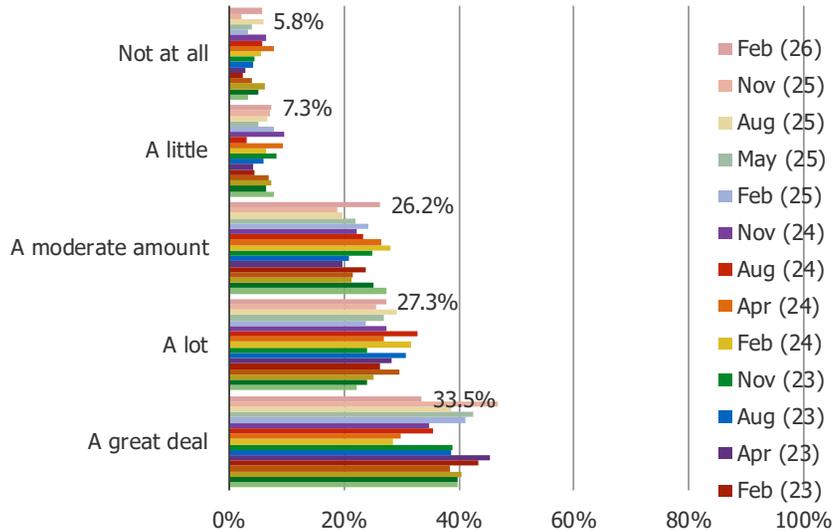


- **Brand Consolidation:** Nike mindshare has grown substantially from its 2023 baseline (24.8%), effectively consolidating its role as the anchor brand for Academy.

Brand	23Q4	24Q1	24Q2	24Q3	24Q4	25Q1	25Q2	25Q3	25Q4	26Q1	R2	P-Value
Nike	24.80%	33.30%	38.60%	35.80%	39.20%	36.10%	30.90%	39.30%	44.30%	37.90%	0.3823	0.0567
Adidas	4.50%	11.60%	16.40%	6.80%	8.80%	13.30%	10.50%	13.10%	18.00%	11.20%	0.2165	0.1754
Under Armour	8.30%	5.80%	11.40%	6.20%	10.50%	6.70%	4.60%	7.10%	7.80%	10.60%	0.0012	0.9257
Columbia	1.90%	3.60%	2.90%	2.50%	1.80%	2.20%	2.00%	3.80%	3.60%	1.20%	0.0025	0.8919
New Balance	2.50%	3.60%	0.70%	2.50%	2.90%	1.10%	2.60%	0.50%	2.40%	3.10%	0.0101	0.7827

## How much of a role do the types of products available at Academy play in your decision to shop at Academy?

Posed to all respondents who have shopped Academy.



- **Stable Niche:** Categories like **Fishing & Hunting** and **Camping** remain stable pillars of the business, showing no dramatic shifts, which indicates a consistent, loyal enthusiast core.

Category	23Q4	24Q1	24Q2	24Q3	24Q4	25Q1	25Q2	25Q3	25Q4	26Q1	R2	P-Value
Apparel / Clothing	18.10%	23.20%	29.70%	19.30%	24.50%	24.60%	19.80%	26.10%	23.00%	18.20%	0.0061	0.8301
Footwear / Shoes	19.90%	15.20%	22.10%	15.30%	25.50%	21.00%	27.50%	23.60%	23.00%	22.20%	0.2862	0.1111
General Sports Equip.	16.90%	20.50%	20.00%	15.30%	23.40%	19.00%	15.90%	17.10%	27.50%	18.20%	0.0457	0.5533
Fishing & Hunting	9.60%	15.20%	13.80%	14.80%	9.90%	9.20%	4.40%	10.10%	12.40%	7.40%	0.2395	0.1511
Camping & Outdoors	4.20%	6.60%	8.30%	5.70%	5.70%	6.70%	6.60%	7.00%	10.70%	5.10%	0.1199	0.3271

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**Why Do Customers Choose Dick's and Academy?**

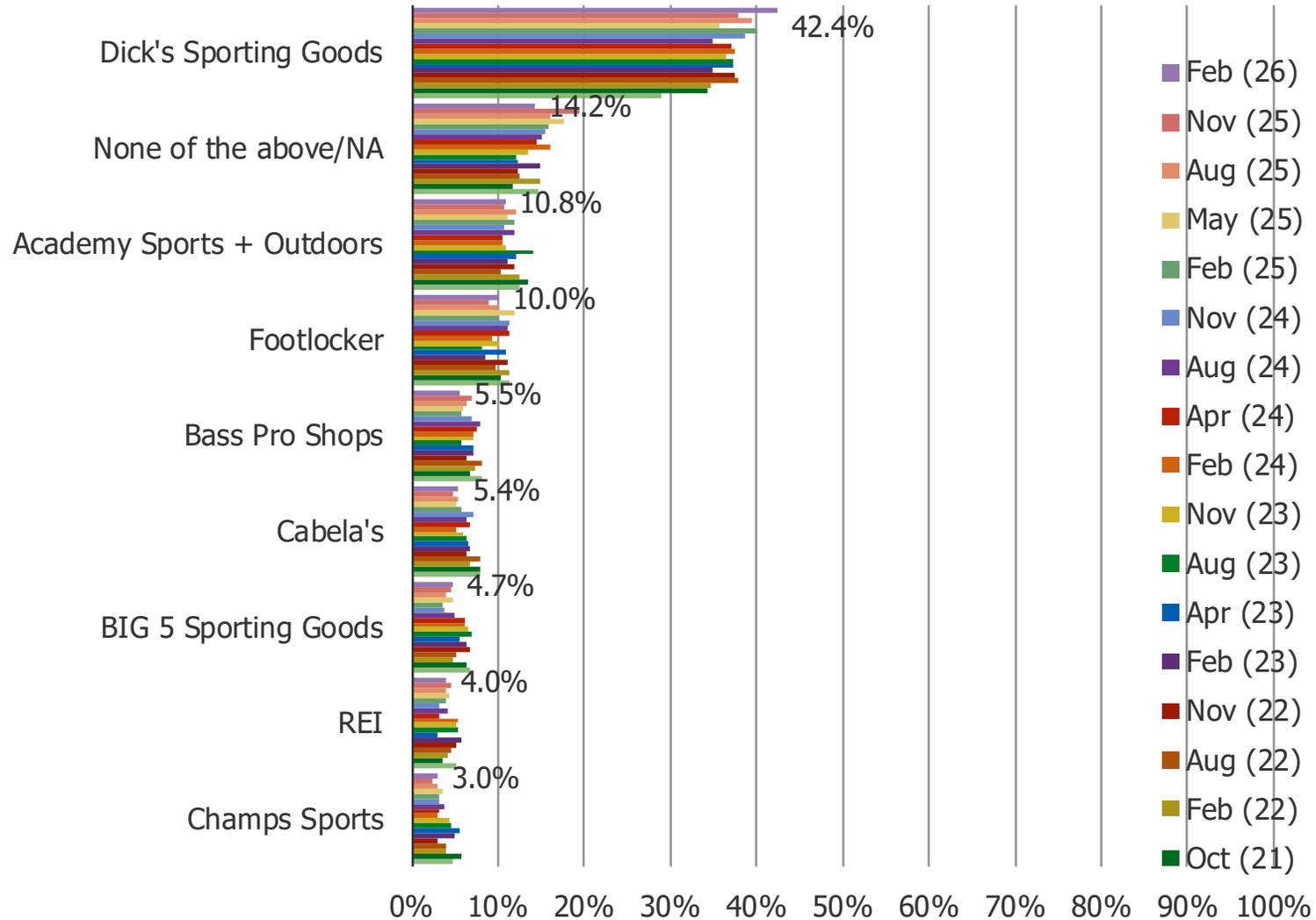
**If You Had To Choose One Sporting Goods Retailer, Which, and Why?**

**Competitive Dynamics**

**Sporting Goods Retail Trends**

**If you had to buy sporting goods/apparel or any related items that these retailers sell, which of the following retailers would you be most likely to choose?**

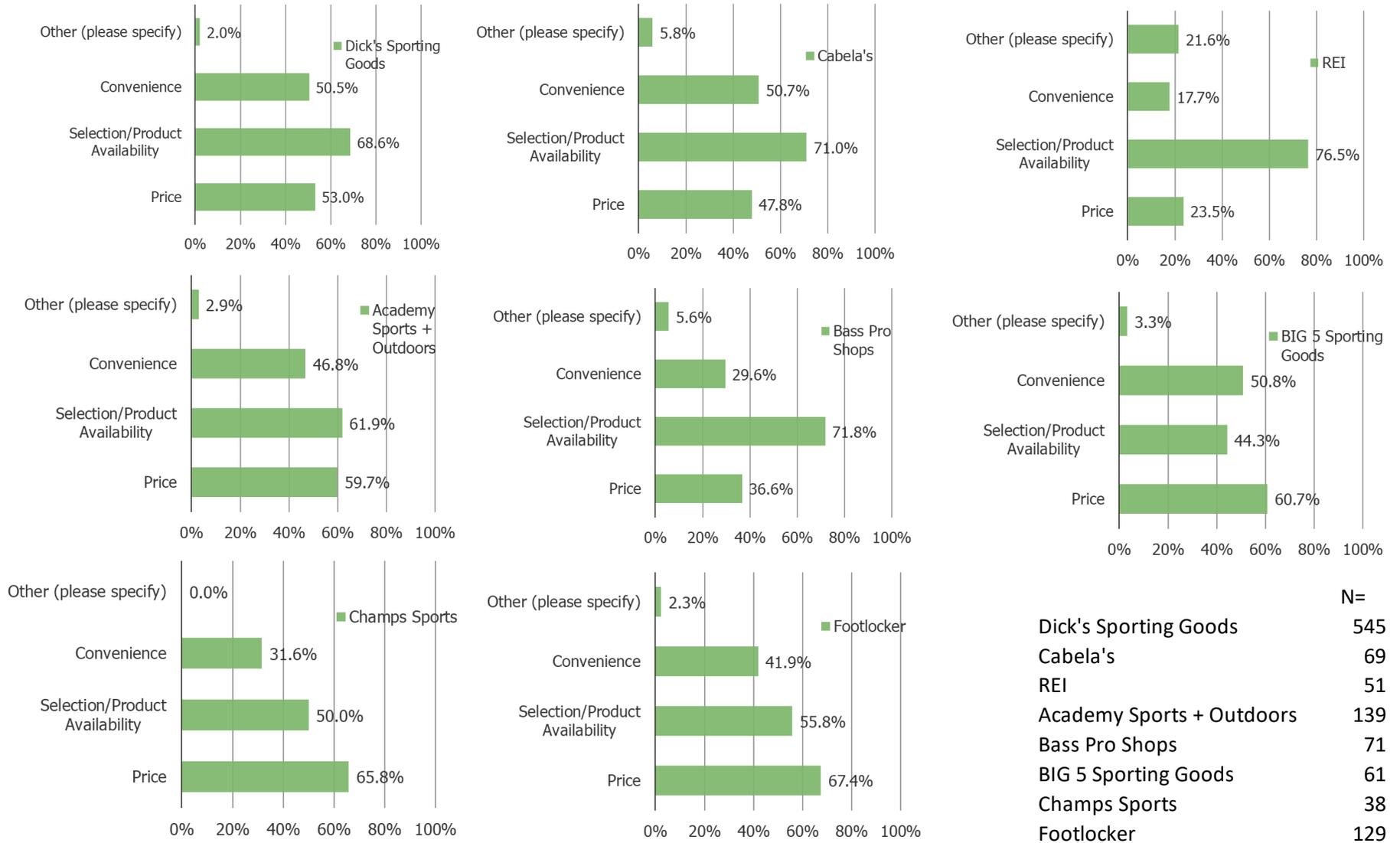
Posed to all respondents.



\* Reasons why respondents selected each of the above over the rest of the list explained on the next page.

### Why would you be most likely to choose \_\_\_\_\_ over other shown on the prior page? (Select ALL that apply)

Posed to all respondents, piping in the answer choice they selected they would pick if shopping for sporting goods today.



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**Why Do Customers Choose Dick's and Academy?**

**If You Had To Choose One Sporting Goods Retailer, Which, and Why?**

**Competitive Dynamics**

**Sporting Goods Retail Trends**

### When you think of sporting goods retail companies, which comes to mind first? (Fill-In)

Posed to all respondents.

Brand	Q4 '23	Q1 '24	Q2 '24	Q3 '24	Q4 '24	Q1 '25	Q2 '25	Q3 '25	Q4 '25	Q1 '26	Series Trend	R2	p-value
Dick's	38.34%	43.11%	45.63%	42.63%	43.29%	41.85%	38.60%	43.65%	40.48%	47.20%	8.86%	0.061	0.4913
Nike	10.70%	7.62%	9.82%	10.40%	11.04%	11.83%	13.78%	14.07%	12.12%	10.73%	0.03%	0.3872	0.0547
Academy	5.51%	6.82%	5.92%	5.71%	6.06%	6.13%	5.05%	5.19%	5.92%	6.14%	0.63%	0.0486	0.5403
Big 5	2.24%	3.52%	4.40%	1.81%	1.23%	1.88%	1.95%	1.95%	1.95%	1.71%	-0.53%	0.2681	0.1252
REI	1.68%	3.30%	1.66%	2.10%	1.44%	2.74%	2.24%	1.37%	1.80%	2.41%	0.73%	0.0116	0.7673
Walmart	1.76%	1.32%	1.59%	2.02%	1.80%	2.16%	1.88%	2.09%	1.08%	2.57%	0.81%	0.1195	0.3278
Adidas	1.28%	1.98%	1.08%	1.30%	1.44%	1.30%	2.38%	1.73%	2.89%	0.78%	-0.50%	0.0552	0.5135
Bass Pro	1.12%	1.91%	1.88%	1.95%	1.52%	1.37%	1.73%	1.23%	1.30%	2.18%	1.06%	0.0039	0.8639
Amazon	2.48%	0.73%	0.58%	0.87%	1.23%	1.30%	2.31%	1.73%	1.80%	1.48%	-1.00%	0.0619	0.4882
Cabela's	1.28%	1.69%	1.44%	1.30%	0.72%	0.94%	0.94%	0.79%	0.79%	1.24%	-0.04%	0.3688	0.0626

**Key Takeaway:** Dick's Sporting Goods maintains a massive, uncontested "monopoly" on top-of-mind awareness in this category. While Nike is hovering just on the edge of a statistically significant upward trend ( $p = 0.0547$ ), the landscape as a whole has been remarkably static over the last ten quarters.

### Have you ever purchased anything form the following retailers?

Posed to all respondents.

