

BESPOKE SURVEYS

US Footwear Vol 23

1250+ Consumers Per Wave

January 2022



JANUARY 2022

- FOOTWEAR VOLUME 23

Audience: 1,250+ US Consumers Balanced To Census

CHECK BREAKDOWN:

ONLINE AND DIRECT TRENDS

Preferences have shifted in the direction of retailers vs. brand direct more recently (though brand direct has gained over a longer time horizon). Preferences have gradually moved over time towards online with fairly steady trends q/q.

ONLINE AND DIRECT BUYERS ARE YOUNGER

Consumers who prefer to buy footwear online and direct skew younger.

BRAND AND RETAILER SPECIFIC FEEDBACK

Nike continues to outperform peers on a number of fronts including future purchase intentions. Skechers has shown some strength more recently (though is still behind Nike).

ATHLETIC CLOTHING TRENDS

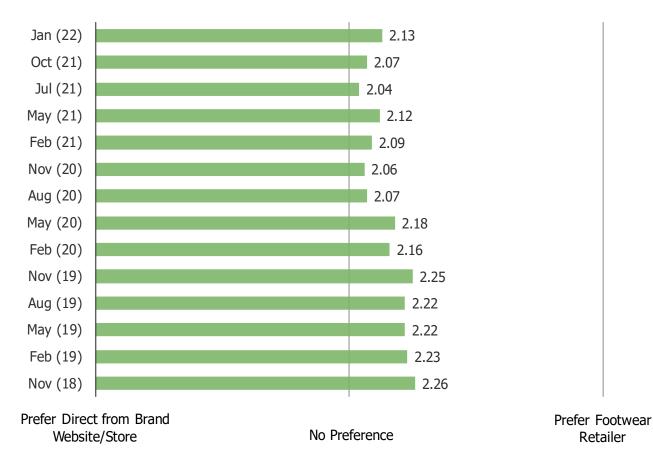
The percentage of consumers who wear athletic clothing casually continues to trend near historical highs (despite declines q/q). Sentiment toward Nike and Under Armour has improved in recent months

FOOTWEAR PURCHASE PREFERENCES

FOR PERSONAL USE ONLY-DO NOT FORWARD OR REDISTRIBUTE

Audience: 1,250 US Consumers Date: January 2022

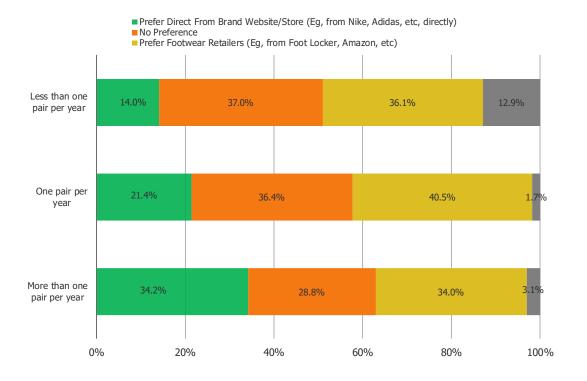
WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?



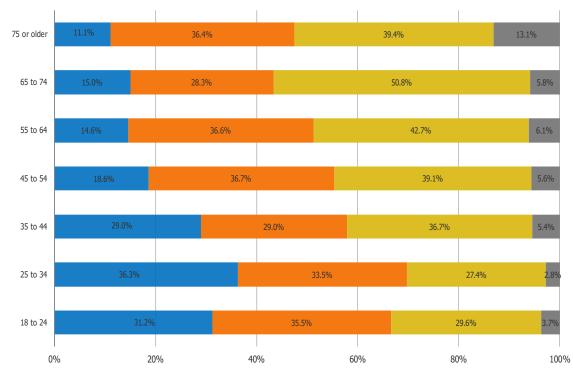
Audience: 1,250 US Consumers Date: January 2022

WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

Cross-Tab Analysis



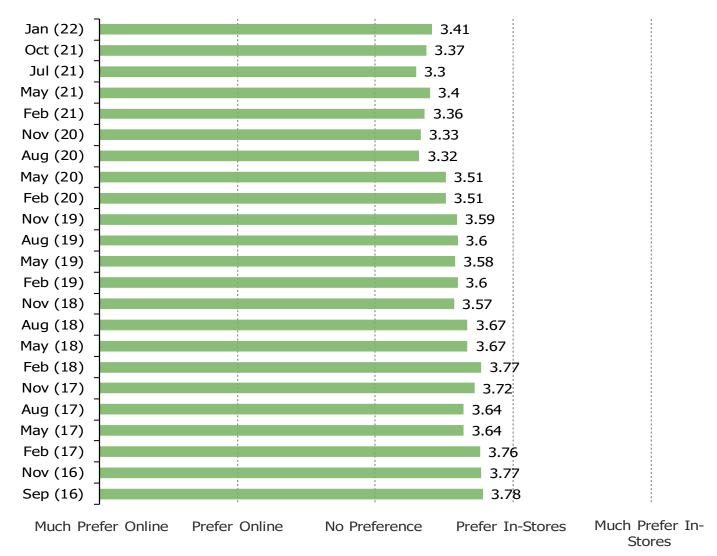
Prefer Direct From Brand Website/Store (Eg, from Nike, Adidas, etc, directly)



BESPOKE MARKET INTELLIGENCE Looking into Their Soles

Audience: 1,250 US Consumers Date: January 2022

WHERE DO YOU PREFER TO BUY SNEAKERS?



BESPOKE MARKET INTELLIGENCE

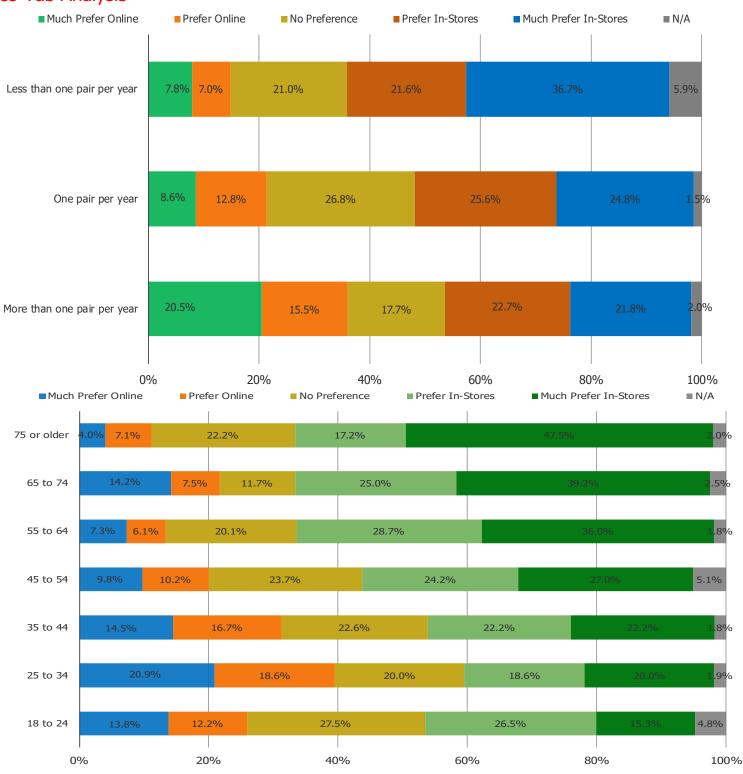
www.bespokeintel.com

Looking into Their Soles

Audience: 1,250 US Consumers Date: January 2022

WHERE DO YOU PREFER TO BUY SNEAKERS?

Cross-Tab Analysis

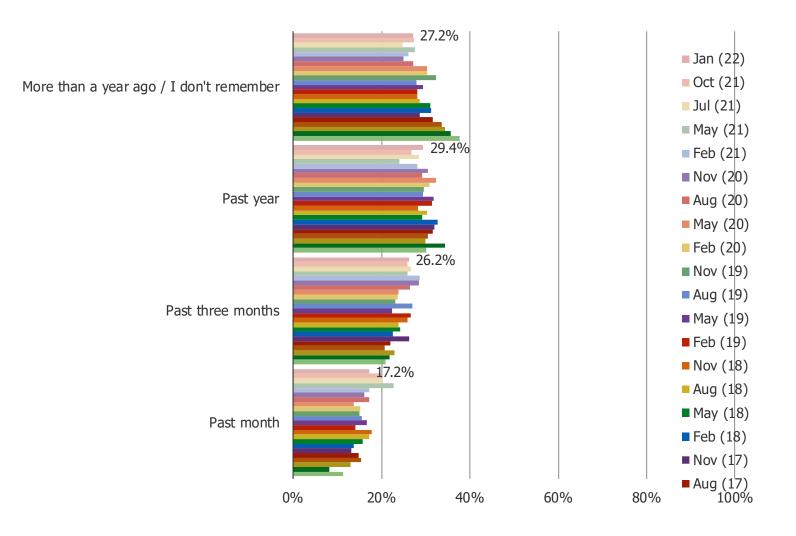


SNEAKER BUYING TRENDS

FOR PERSONAL USE ONLY-DO NOT FORWARD OR REDISTRIBUTE

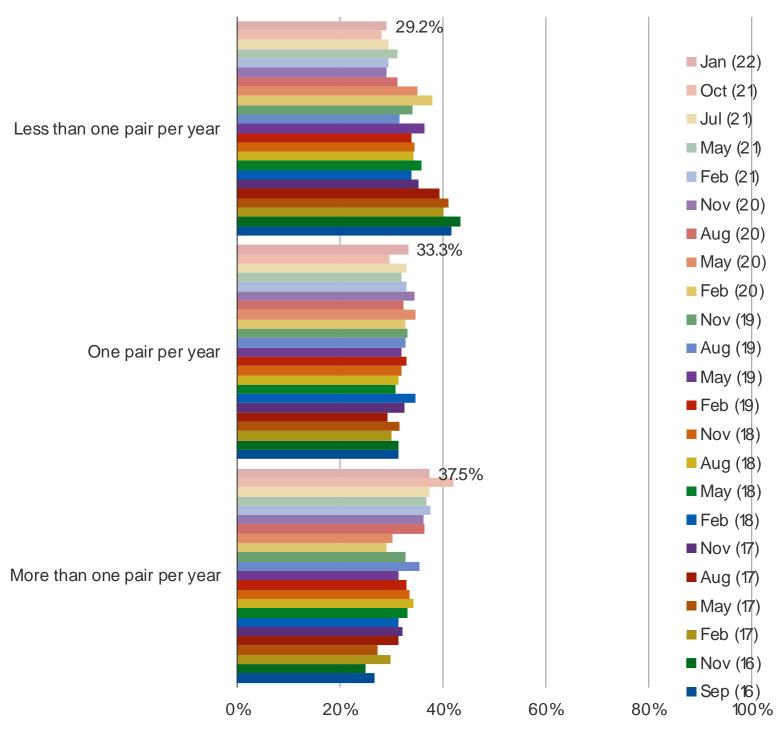
Audience: 1,250 US Consumers Date: January 2022

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



Audience: 1,250 US Consumers Date: January 2022

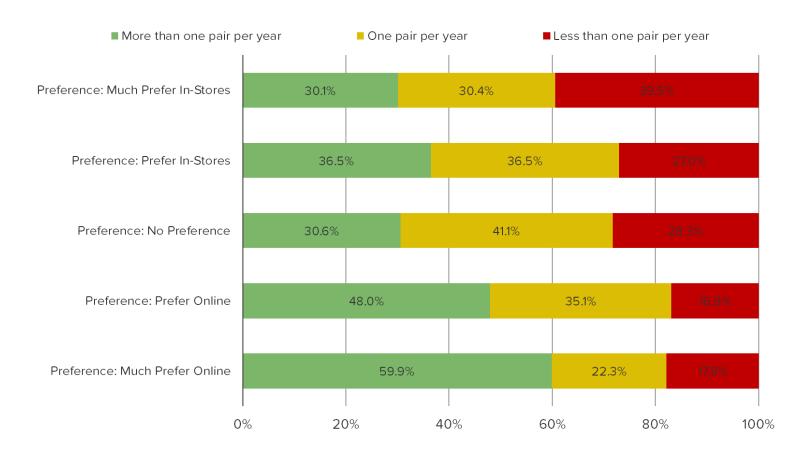
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?



Audience: 1,250 US Consumers Date: January 2022

HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

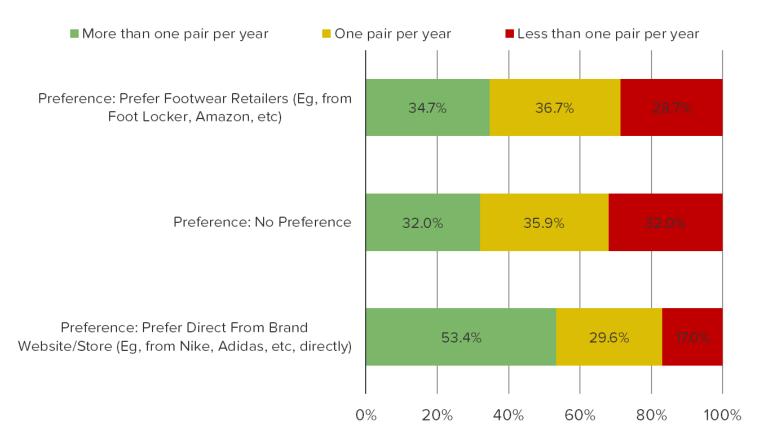
Posed to all respondents – Cross-tabbed by if they prefer to buy online vs. in-stores.



Audience: 1,250 US Consumers Date: January 2022

HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

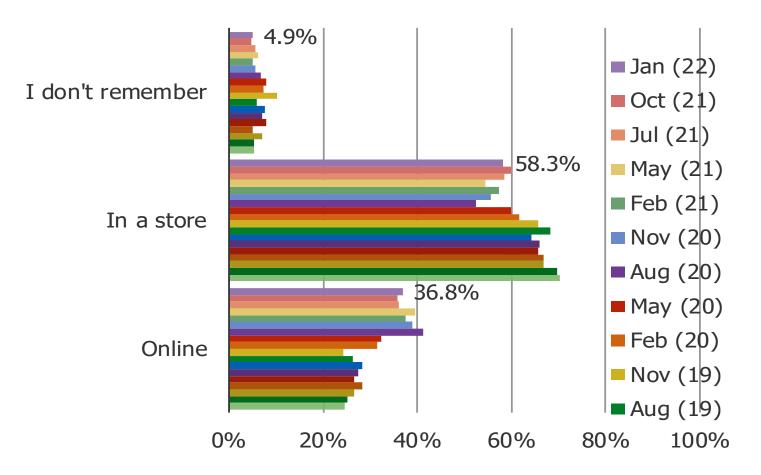
Posed to all respondents – Cross-tabbed by if they prefer to buy direct or from retailers.



Looking into Their Soles

Audience: 1,250 US Consumers Date: January 2022

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

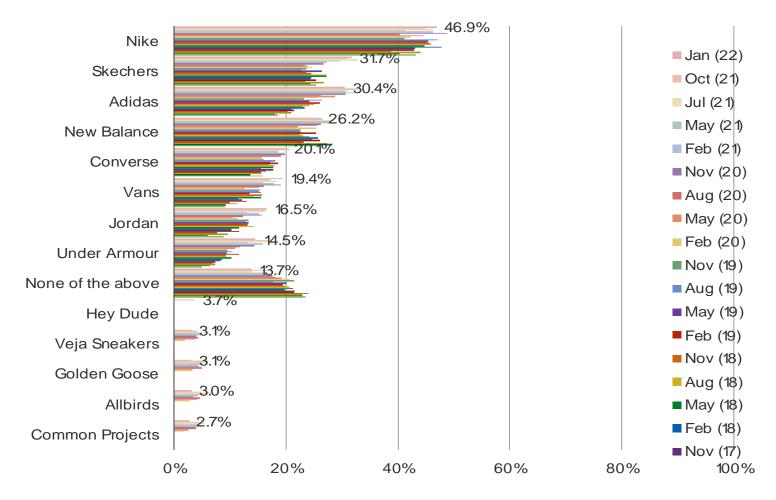


SNEAKER BRANDS

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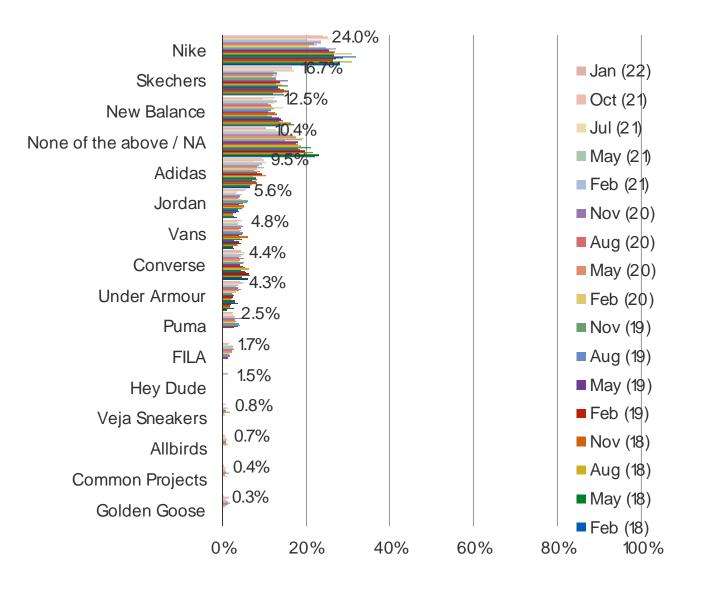
Audience: 1,250 US Consumers Date: January 2022

WHICH OF THE FOLLOWING BRANDS DO YOU OWN SNEAKERS FROM?



Audience: 1,250 US Consumers Date: January 2022

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

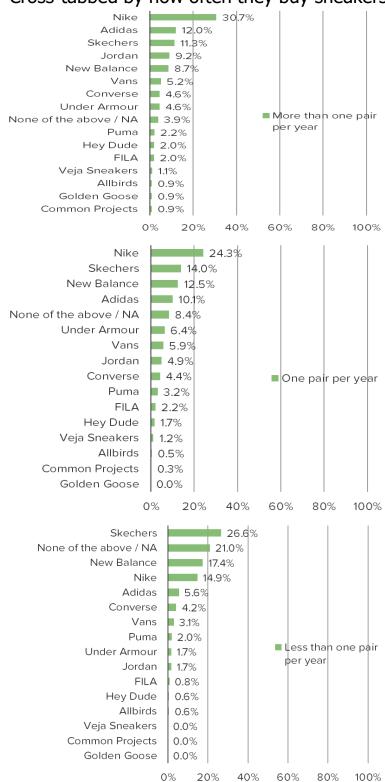


Looking into Their Soles

Audience: 1,250 US Consumers Date: January 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.

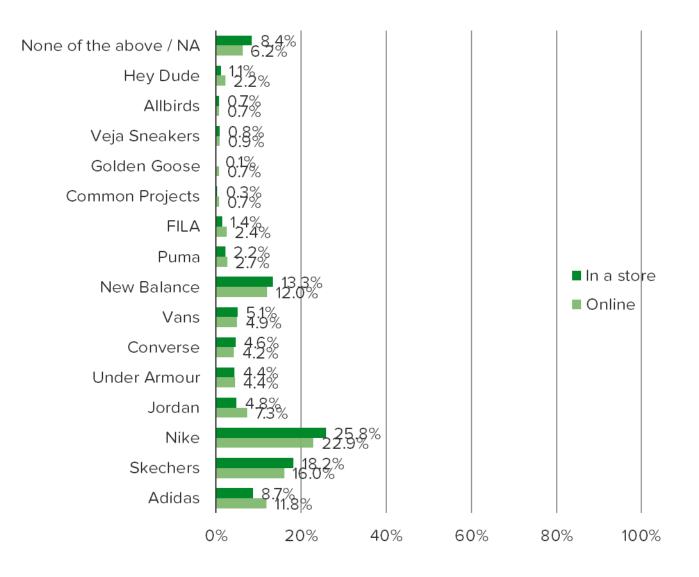


Looking into Their Soles

Audience: 1,250 US Consumers Date: January 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.

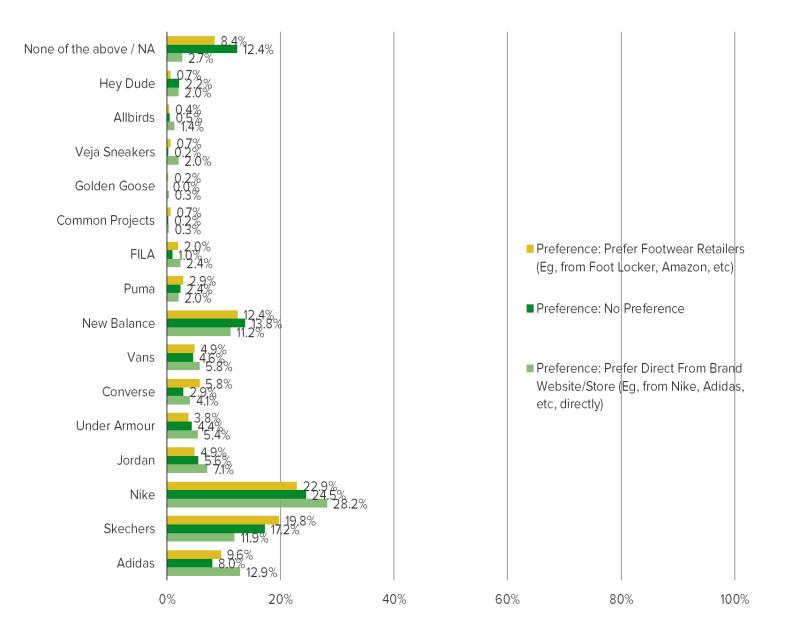


Looking into Their Soles

Audience: 1,250 US Consumers Date: January 2022

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FOOTWEAR RETAILERS

FOR PERSONAL USE ONLY-DO NOT FORWARD OR REDISTRIBUTE

Jan (22)

Oct (21)

Jul (21)

May (21)

Feb (21)

Nov (20)

Aug (20)

May (20)

Feb (20)

■ Nov (19)

Aug (19)

■ May (19)

Feb (19)

Nov (18)

Aug (18)

May (18)

■ Feb (18)

■ Nov (17)

Aug (17)

May (17)

Feb (17)

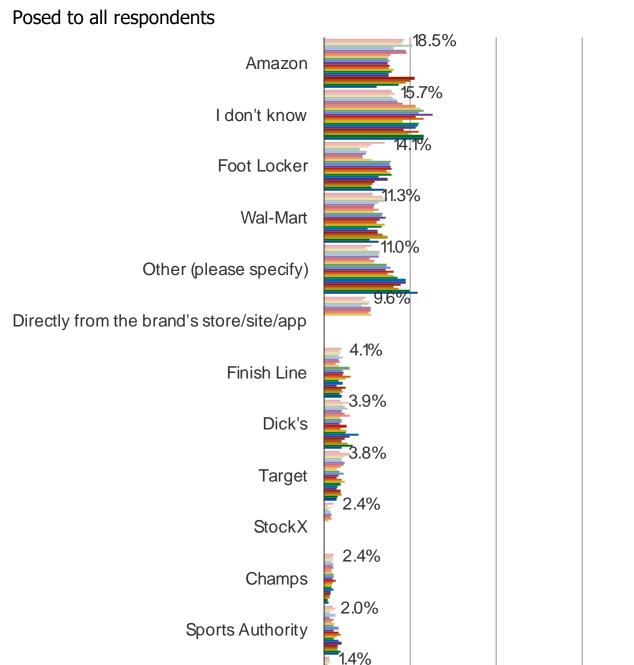
■ Nov (16)

■ Sep (16)

80%

Audience: 1,250 US Consumers Date: January 2022

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



GOAT

0%

20%

40%

60%

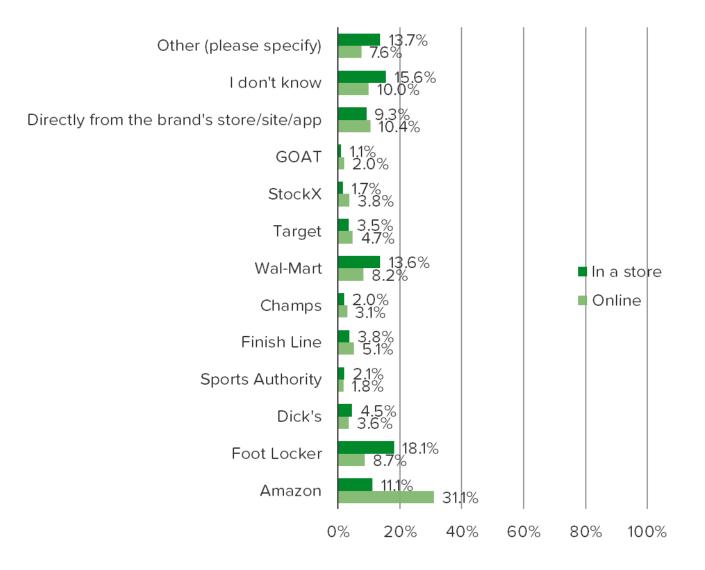
100%

Looking into Their Soles

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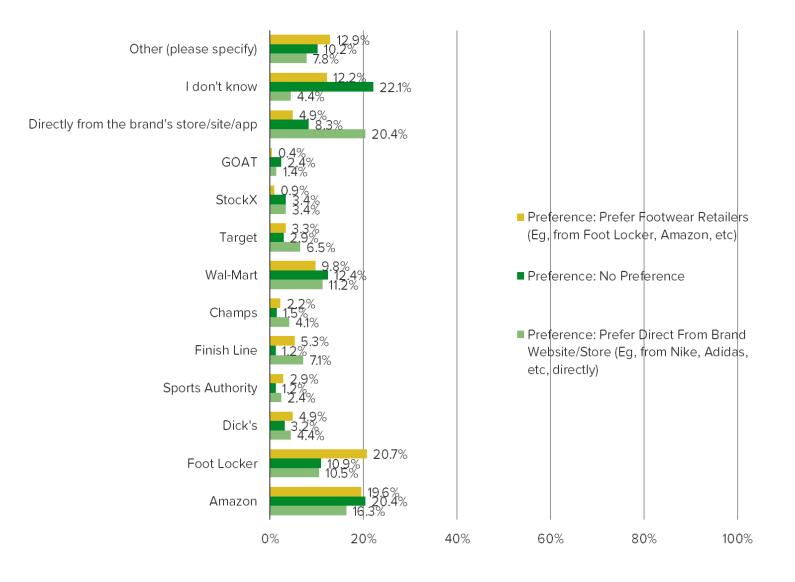
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Audience: 1,250 US Consumers Date: January 2022

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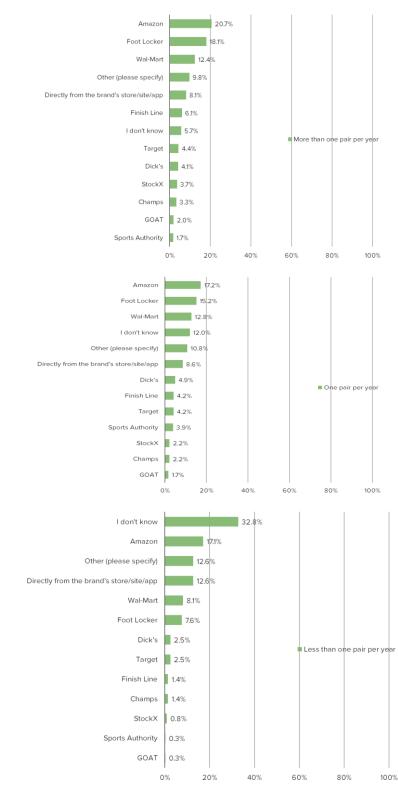


Looking into Their Soles

Audience: 1,250 US Consumers Date: January 2022

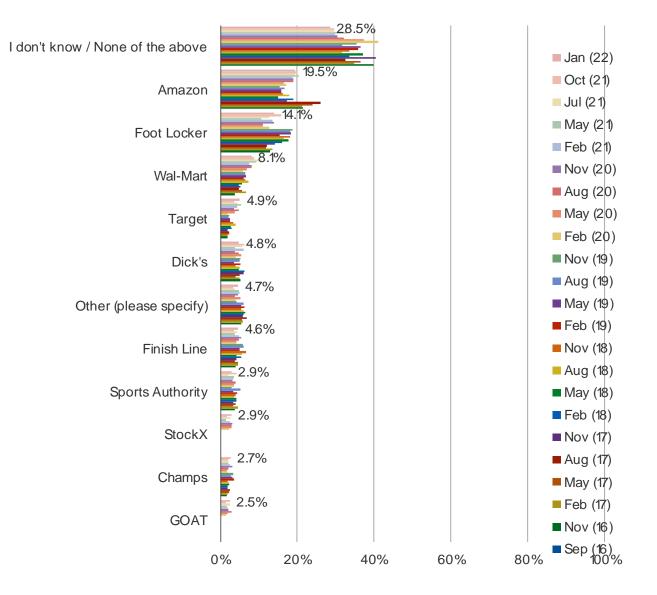
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Posed to all respondents – Cross-tabbed by how often they buy sneakers.



Audience: 1,250 US Consumers Date: January 2022

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

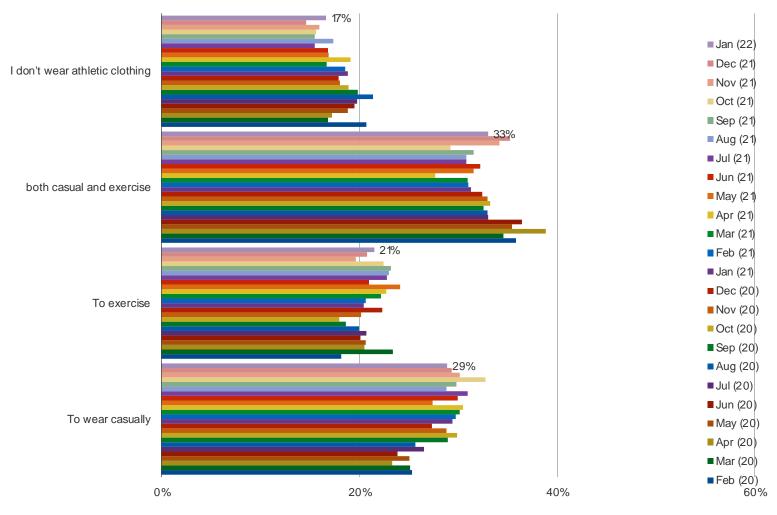


CASUAL WEAR

FOR PERSONAL USE ONLY-DO NOT FORWARD OR REDISTRIBUTE

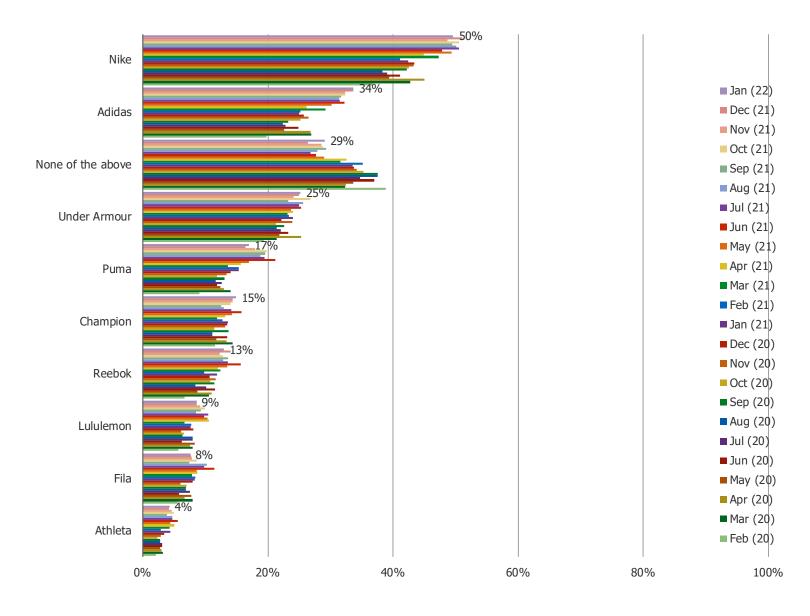
Audience: 1,250 US Consumers Date: January 2022

WHAT DO YOU USE ATHLETIC CLOTHING FOR?



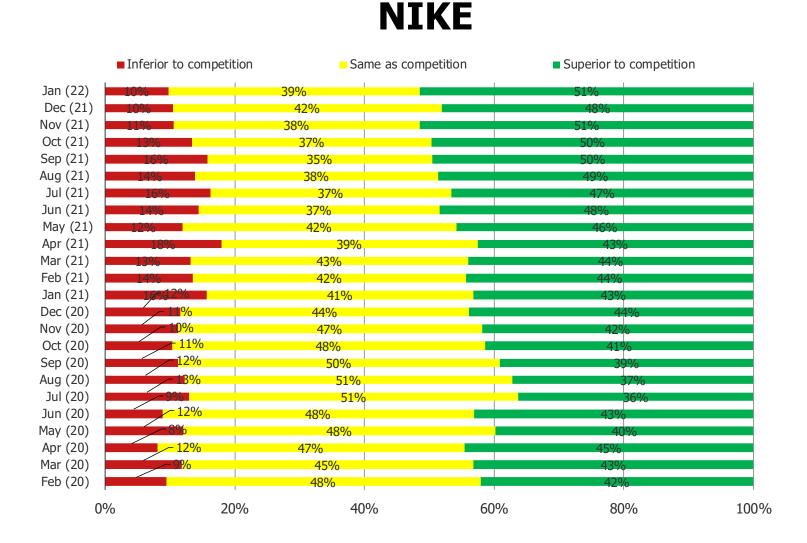
Audience: 1,250 US Consumers Date: January 2022

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



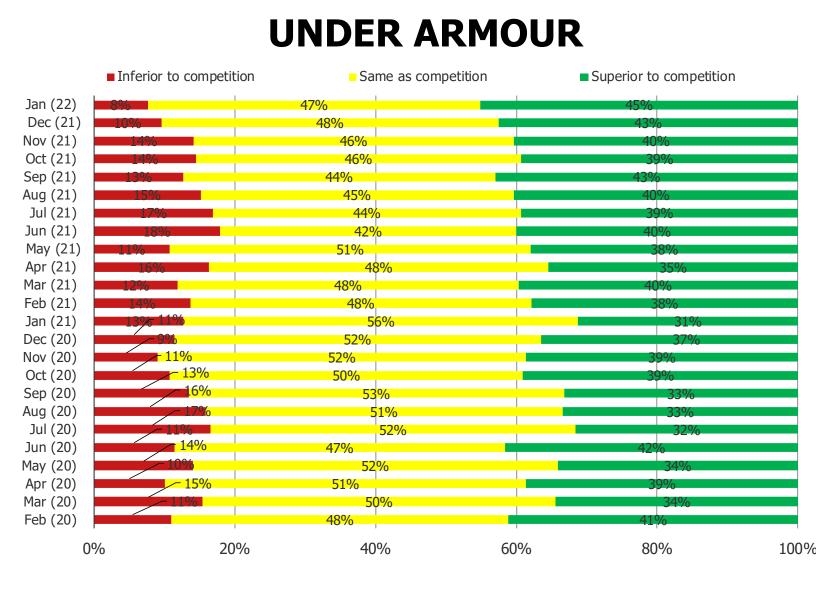
Audience: 1,250 US Consumers Date: January 2022

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



Audience: 1,250 US Consumers Date: January 2022

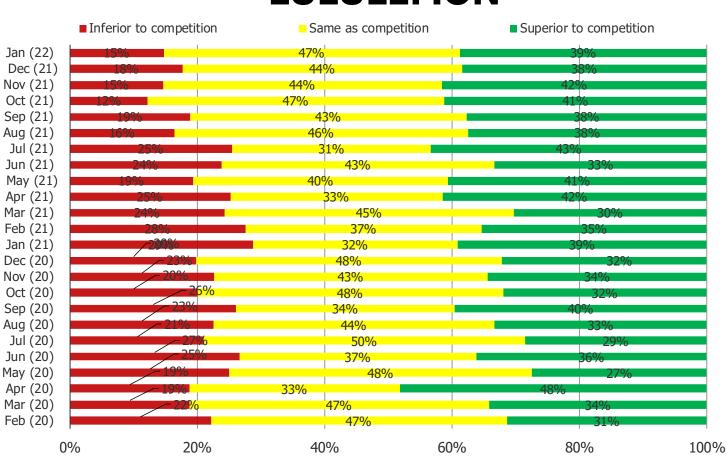
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Audience: 1,250 US Consumers Date: January 2022

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

Audience: 1,250 US Consumers Date: January 2022

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

	Inferior to competition	Same as competi	tion s	Superior to competition	
Jan (22)	15%	58%		27%	
Dec (21)	20%	5070		21%	
Nov (21)		53%		37%	
Oct (21)	20%	53%		27%	
Sep (21)	19%	53%		28%	
Aug (21)	16%	53%		31%	
Jul (21)	19%	50%		31%	
Jun (21)		52%		34%	
May (21)	18%	55%		28%	
Apr (21)	17%	60%		23%	
Mar (21)	21%	52%		27%	
Feb (21)	19%	59%		27/0	
Jan (21)	18%-18%	55%		27%	
Dec (20)	-17%	57%		2770	
Nov (20)	23%	61%		22%	
Oct (20)	17%	58%		20%	
Sep (20)	-21%	49%		34%	
Aug (20)	-21%	58%		21%	
Jul (20)	- 16%	58% 60%		19%	
Jun (20)	31%	61%		23%	
May (20)	-12%		17%		
		59%	/ %0	22%	
Apr (20) Mar (20)	230				
Mar (20)	2370	50%		31%	
Feb (20)		54%	I	24%	
0	9% 20%	40%	60%	80%	100

Audience: 1,250 US Consumers Date: January 2022

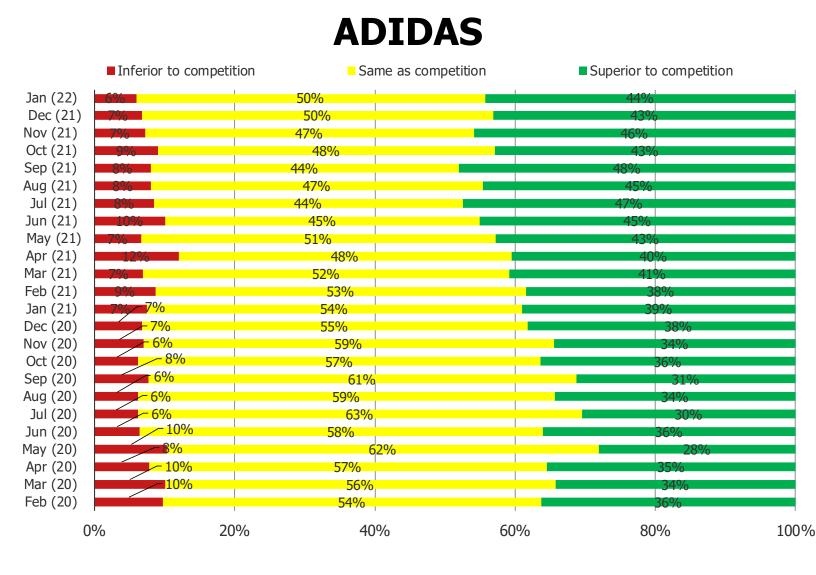
IN YOUR OPINION, HOW DOES THIS BRAND'S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

		r				
	Inferior to compet	ition Sa	me as competition	Supe	rior to competition	
Jan (22)	12%	53%	 0		35%	
Dec (21)		579			32%	
Nov (21)	10%	46%	~		44%	
Oct (21)	10%	45%			44%	
Sep (21)		47%			42%	
Aug (21)	14%	48%			38%	
Jul (21)		46%			44%	
Jun (21)	10%	46%			44%	
May (21)	12%	55	0/		33%	
Apr (21)	110/	53%	/0		36%	
Mar (21)	70/2	54%			39%	
Feb (21)	150/2	490			36%	
Jan (21)	13% ~ 16%	49%	-		37%	
Dec (20)		489			37%	
Nov (20)	11%		/0 _%		29%	
Oct (20)	7%	57			31%	
Sep (20)	15%	-	70			
	-00/	61%	E00/		32%	
Aug (20)	- 11%	62%	58%			
Jul (20)		02%			30%	
Jun (20)	18%		63%		26%	
May (20)	10%		53%		31%	
Apr (20)			56%		26%	
Mar (20)	13%		59%		27%	
Feb (20)		1	61%		26%	
0	% 20	0% 40	%	60%	80%	100%



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Inferior	r to competition	Sa	me as competition	SI	uperior to competition	
n (22)			63%		27%	
ec (21) 9%		59%	2		32%	
v (21)	0		53%		31%	
t (21) 8%		64	%		28%	
p (21) 12%		55	%		32%	
g (21) 13%		5	6%		31%	
ll (21) 12%			61%		26%	
n (21) 12%		569	%		33%	
ay (21) 7%		6	9%		24%	
r (21) 15%			65%		20%	
r (21) 9%		62	%		29%	
o (21) 13%			60%		27%	
n (21) 8%-9	9%	6	6%		26%	
c (20)	10%	(6%		26%	
/ (20)	6%		69%		22%	
t (20)	-8%	6	6%		26%	
o (20)	8%		70%		22%	
j (20)	<u>~14%</u>		69%		23%	
I (20)	~13%		64%		22%	
n (20)	10%		67%		21%	
(20)	8%		67%		23%	
· (20)	~11%	6	5%		27%	
(20)	~1 1%	6	0%		29%	
(20)			65%		24%	

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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

	Inferior to competition	Sa	me as competition	Superior to	o competition
Jan (22)	11%	48%		41	%
Dec (21)	11%	51%			38%
Nov (21)	9%	46%		45%	
Oct (21)	12%	55	0/		32%
Sep (21)	11%	42%	/0	47%	0270
Aug (21)	40/	49%		47%	
Jul (21)	110/	36%		53%	
				52%	
Jun (21)		39%		52%	
May (21)		51%		3	88%0
Apr (21)	21%		9%		9%
Mar (21)	10%	43%		48%	
Feb (21)	26%		56%		19%
Jan (21)	8%	48%		44%	
Dec (20)			1%		33%
Nov (20)			51%		33%
Oct (20)	12%	58	3%		31%
Sep (20)	17%	46%		41	%
Aug (20)	9%	43%		40	9%
Jul (20)	-15%	52%		3	9%
Jun (20)	17%	48%	0		37%
May (20)	7%	43%		40	%
Apr (20)	-22%	44%		49%	
Mar (20)	6%		49%		29%
Feb (20)		56%			38%
0	% 20%	40	%	50% 80	0% 100%

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