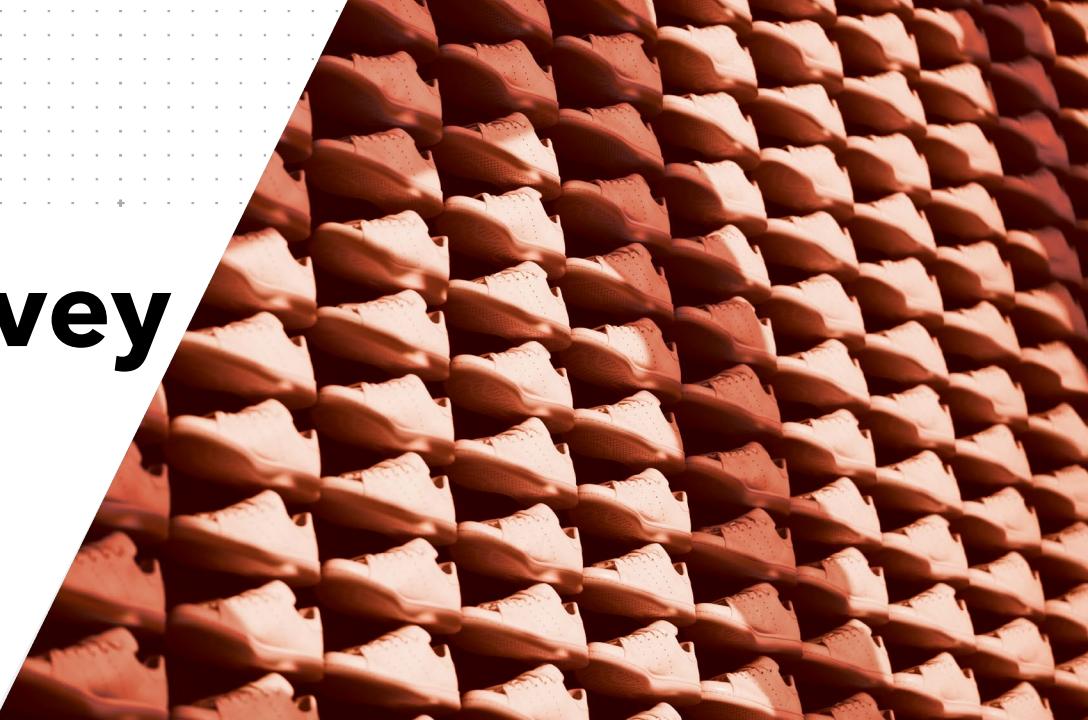
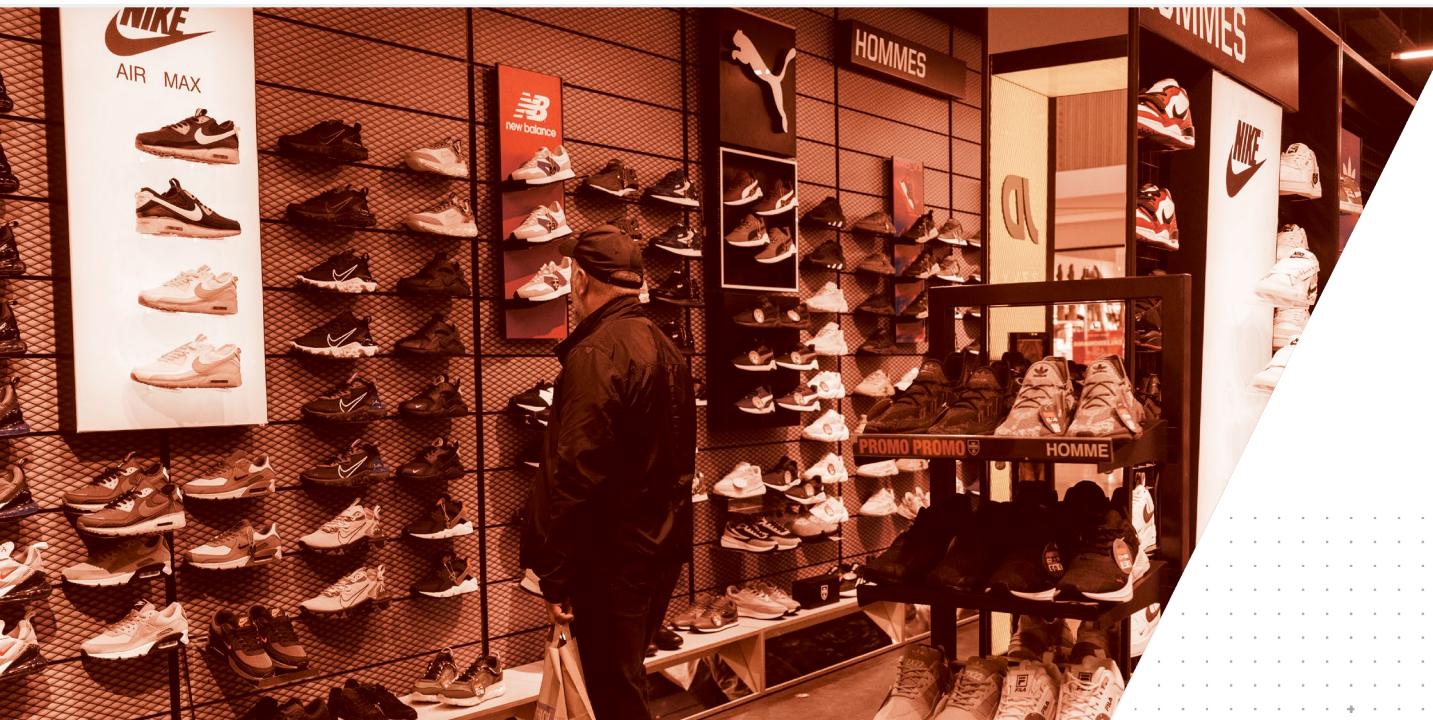


BI Athleisure Footwear Survey

November 2025

Nike Still Leads Sneaker Purchases



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Key Takeaways

54%

of respondents have purchased Nike sneakers in the past 12 months.

46%

of respondents typically purchase their sneakers directly from the brand.

76%

of respondents use their sneakers for lifestyle, style and hanging out with friends.

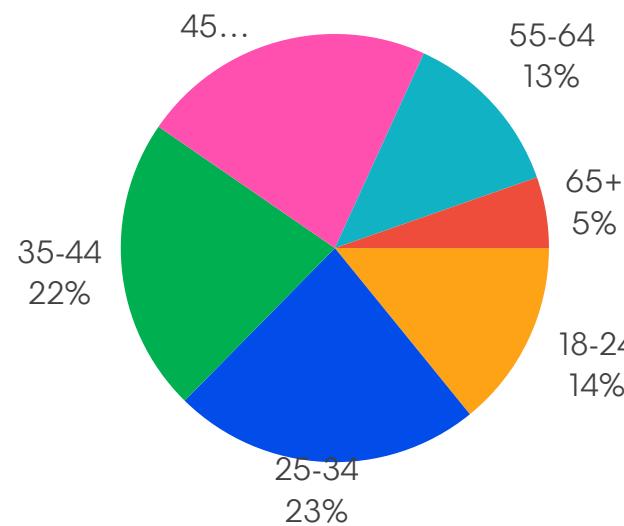
Executive Summary

Millennials, who control more than \$7 trillion in spending power, are fueling sneaker sales this holiday season - with more than 20% planning to spend more on both athletic and lifestyle styles, according to a Bloomberg Intelligence survey of more than 1,000 consumers. Nike still dominates market share, cultural relevance and consumer loyalty across income, age and gender, despite rising competition in niche segments and premium performance. On and Hoka are small, yet have seen consumer awareness and market share grow. The increasing use of sneakers on and off the court reflects a robust growth outlook, with Euromonitor projecting 2.9% growth compounded annually from 2024-29.

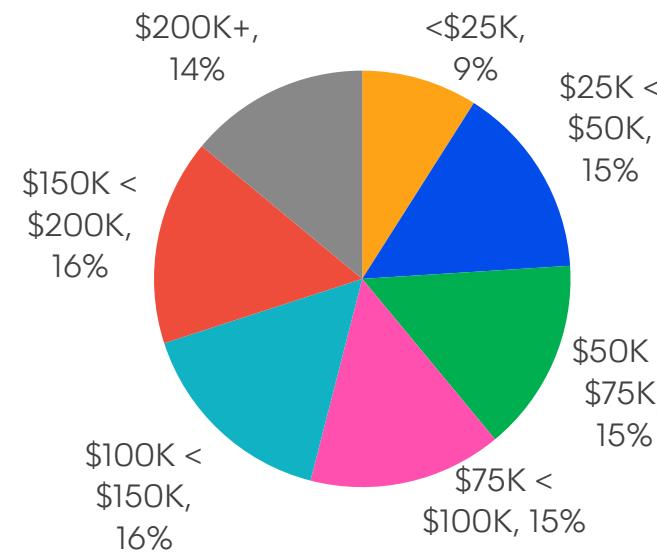
Survey Methodology

BI's survey of athleisure footwear purchasing and wearing behavior among US consumers, conducted jointly with Attest on Nov 3-7, had a sample size of 1,206, of whom 675 purchased athletic sneakers in the past 12 months and 432 bought lifestyle shoes. Factors like geographical location, gender and age were controlled to keep sample averages similar to US demographics. About 14% were 18-24 years old, 23% were 25-34, 22% were 35-44 and 40% were 45 and over. Women made up 51% and men 49%. The survey's goal was to capture a comprehensive understanding of sneaker-buying behavior and future purchasing intent across a broad consumer base.

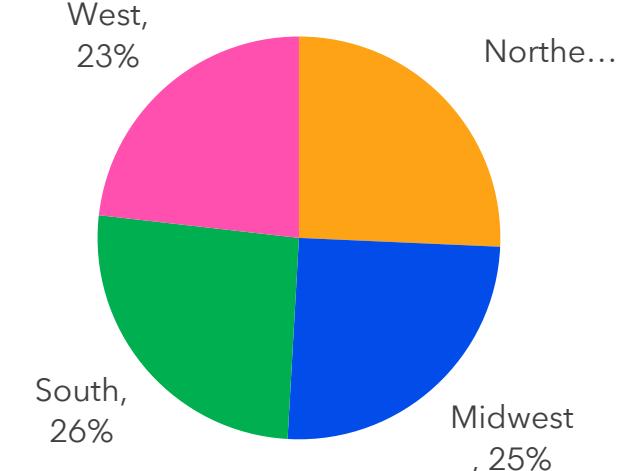
Respondents by Age



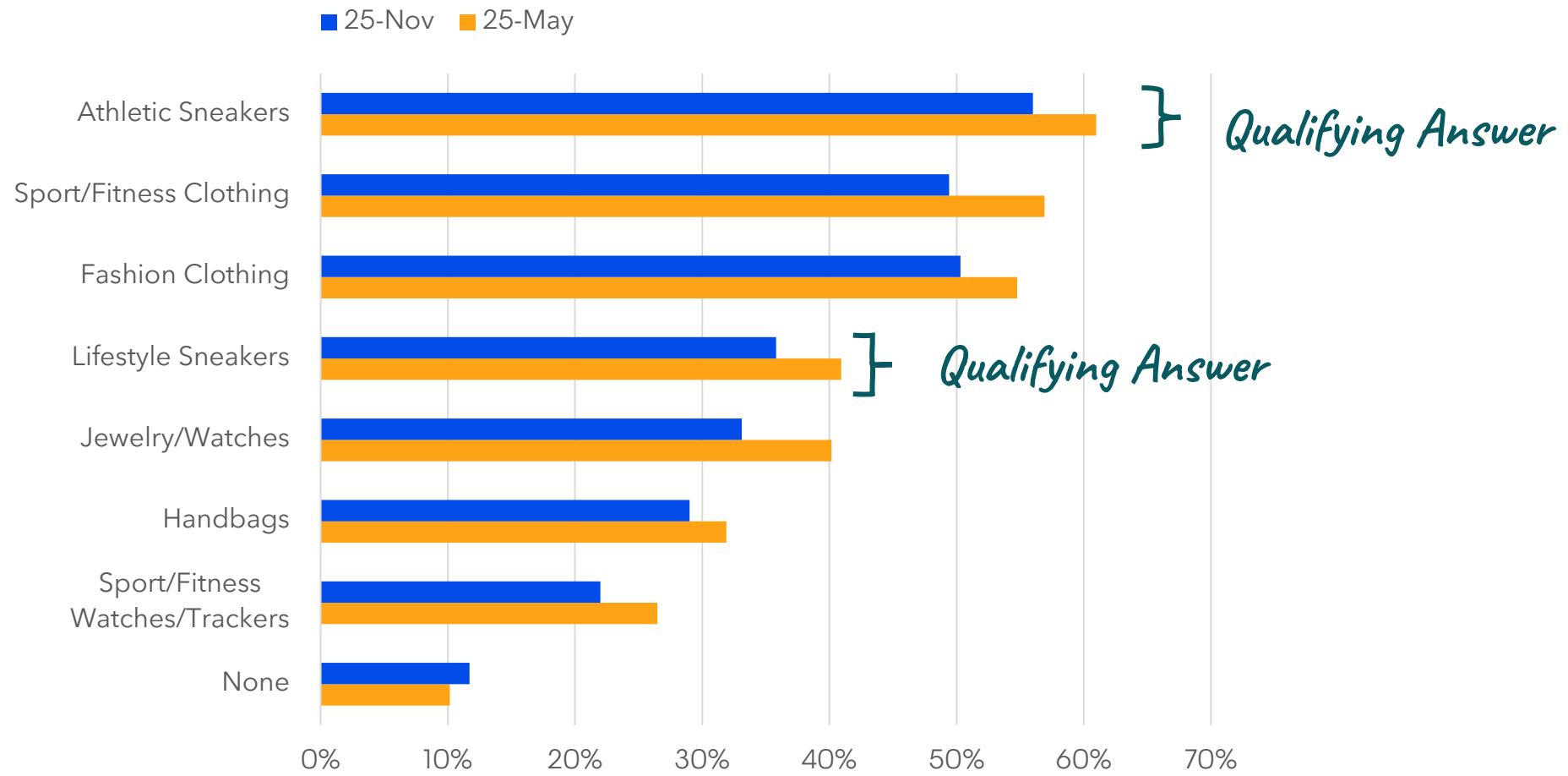
Respondents by Household Income



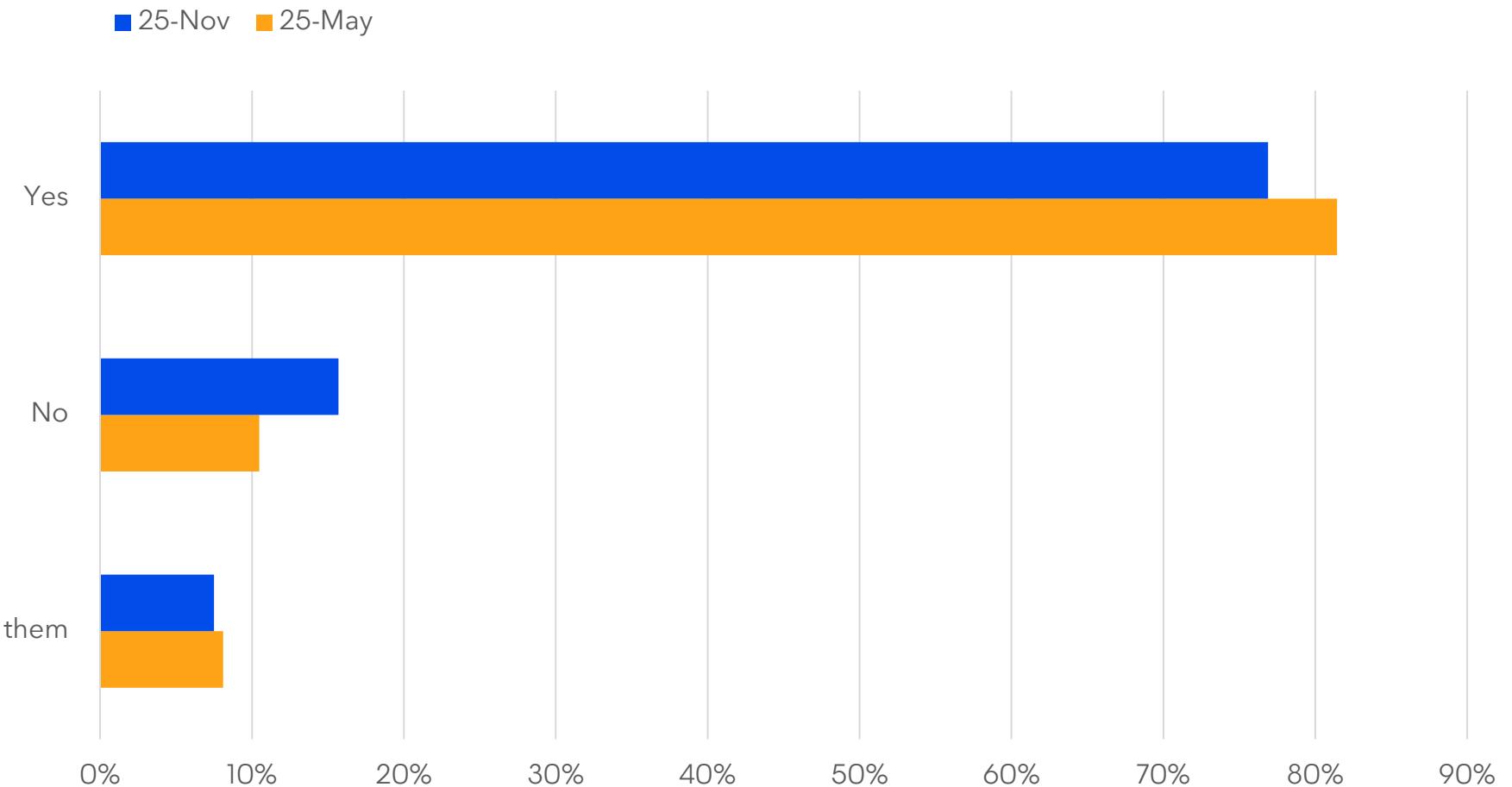
Respondents by Region



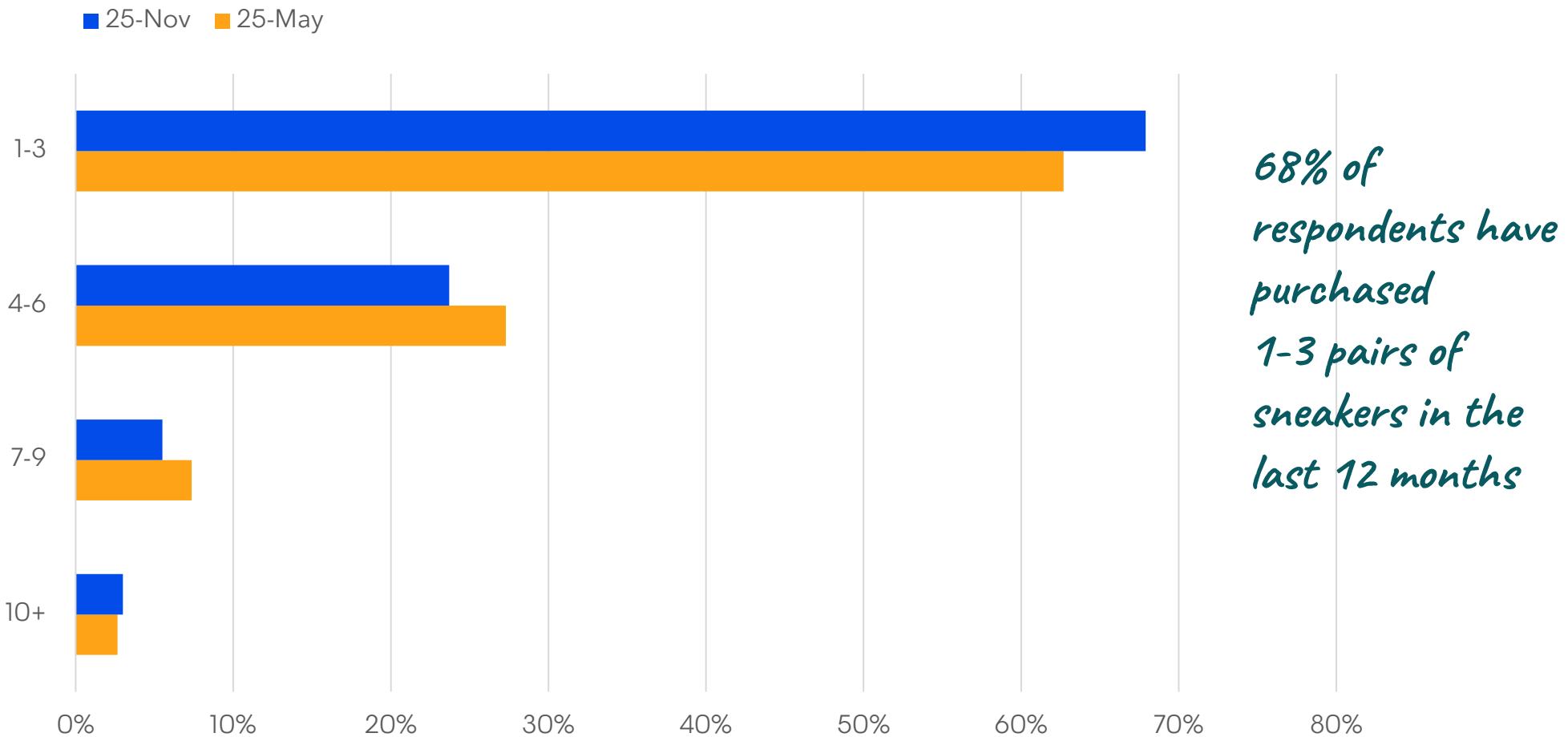
Which of the following have you bought in the last 12 months?



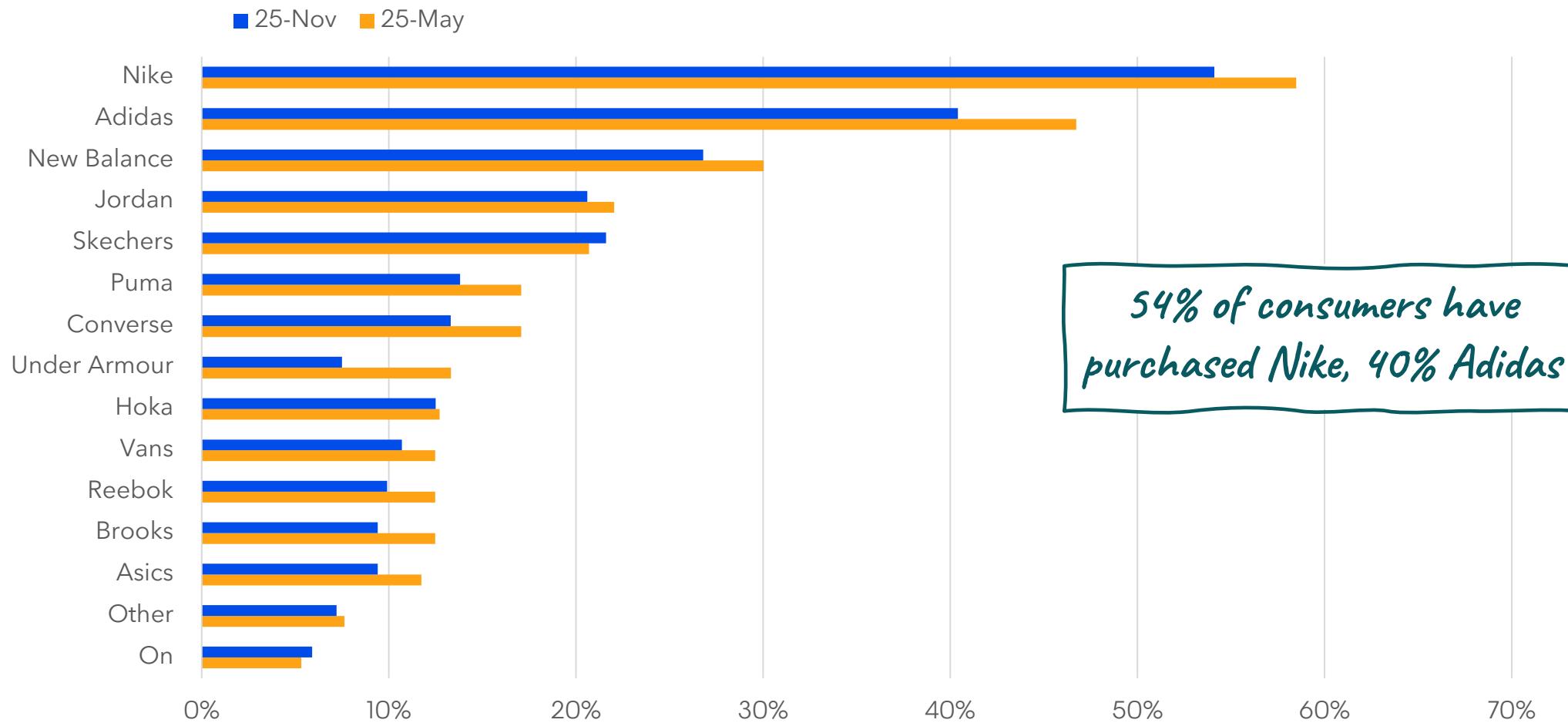
You did not indicate you purchased sneakers in the last 12 months. Do you own and use sneakers?



How many pairs of sneakers have you bought in the last 12 months?

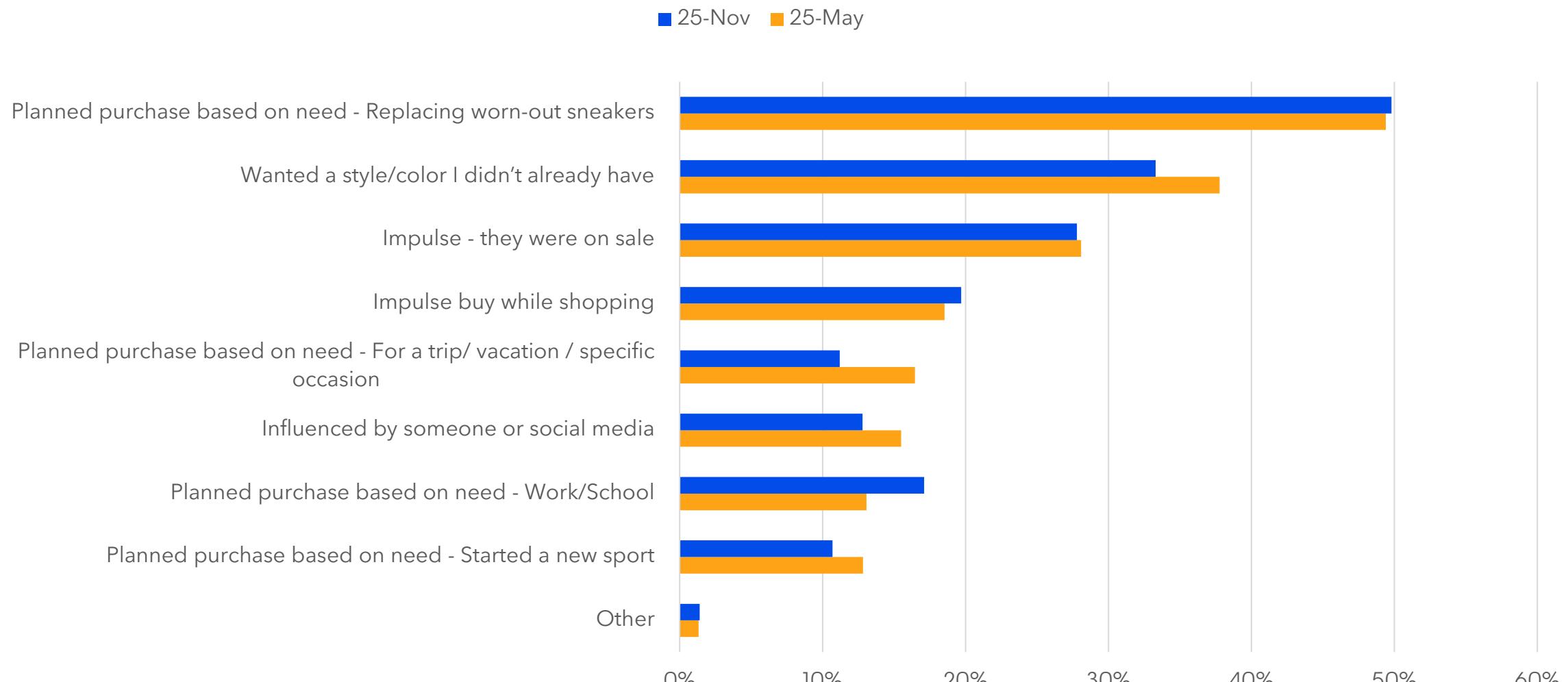


What brands of sneakers have you purchased in the last 12 months?

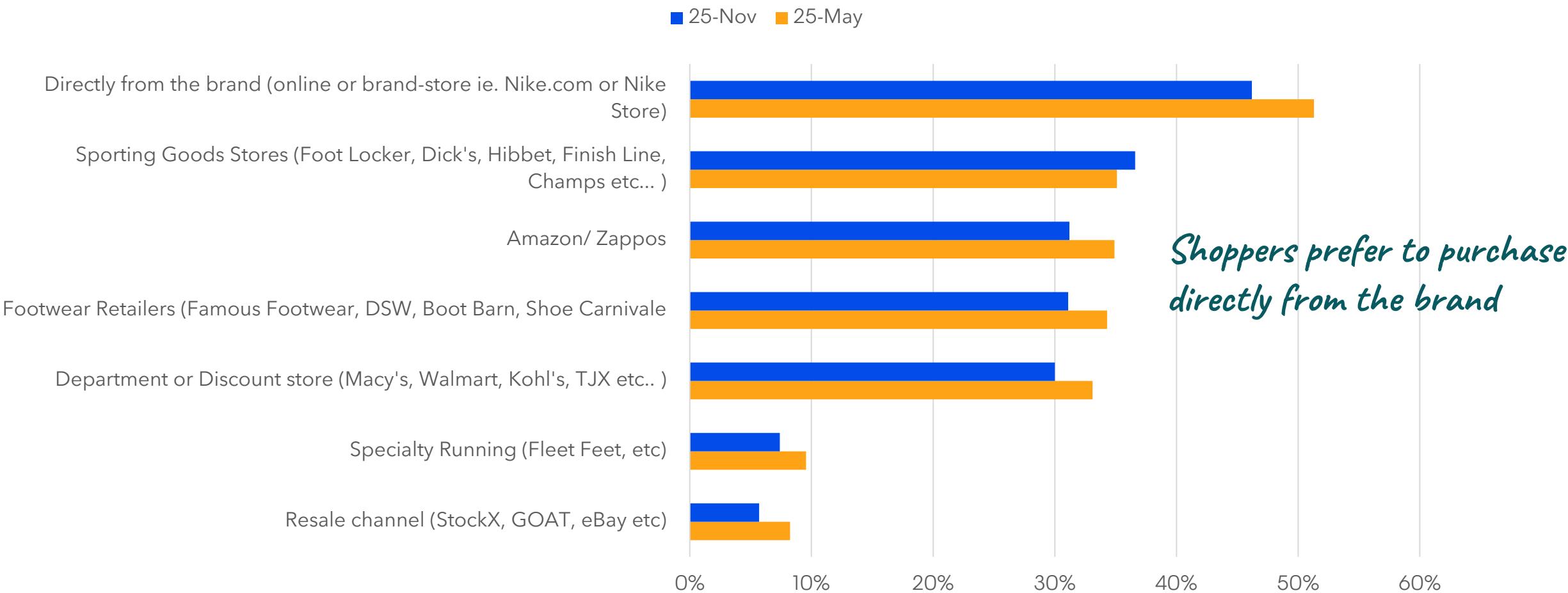


54% of consumers have purchased Nike, 40% Adidas

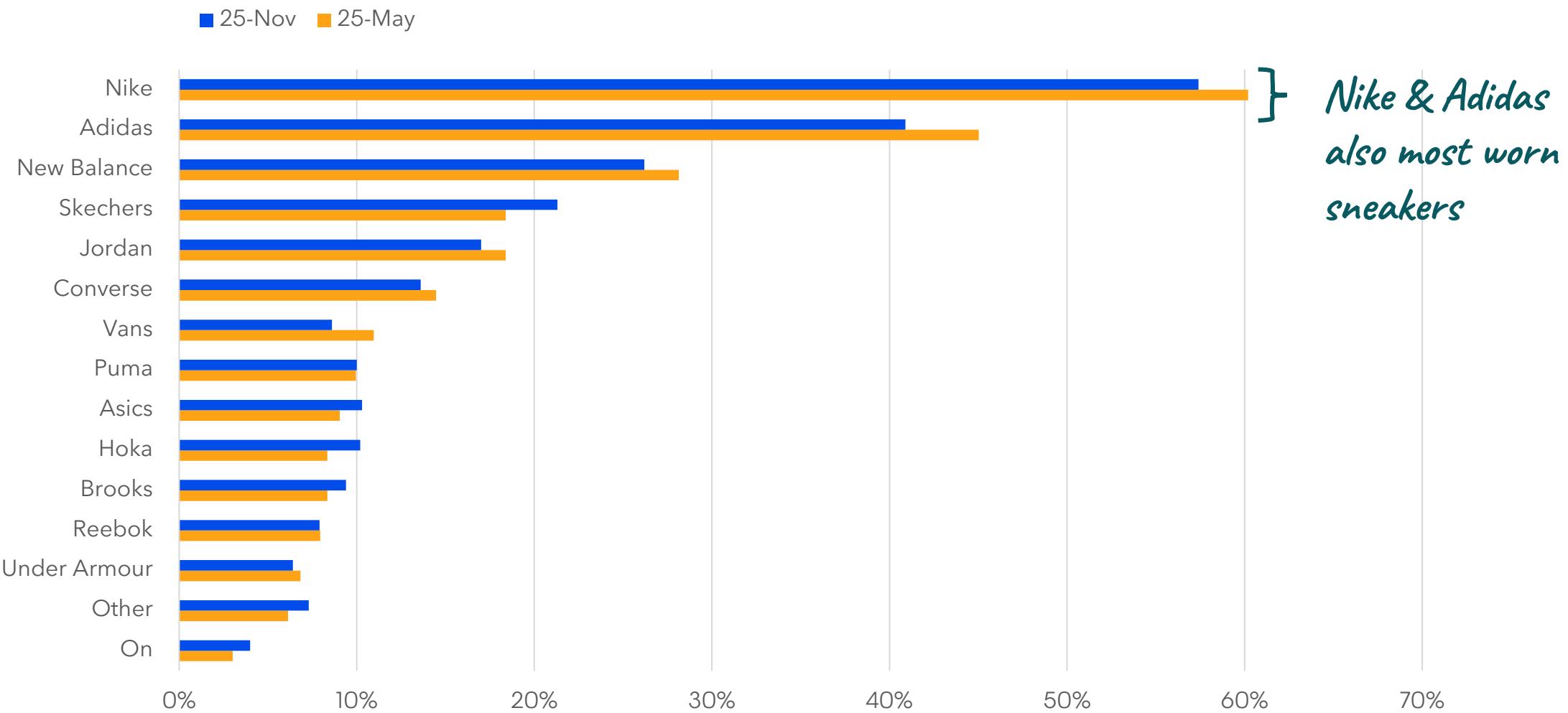
Which of the following best describes your last purchase of sneakers (athletic or lifestyle)?



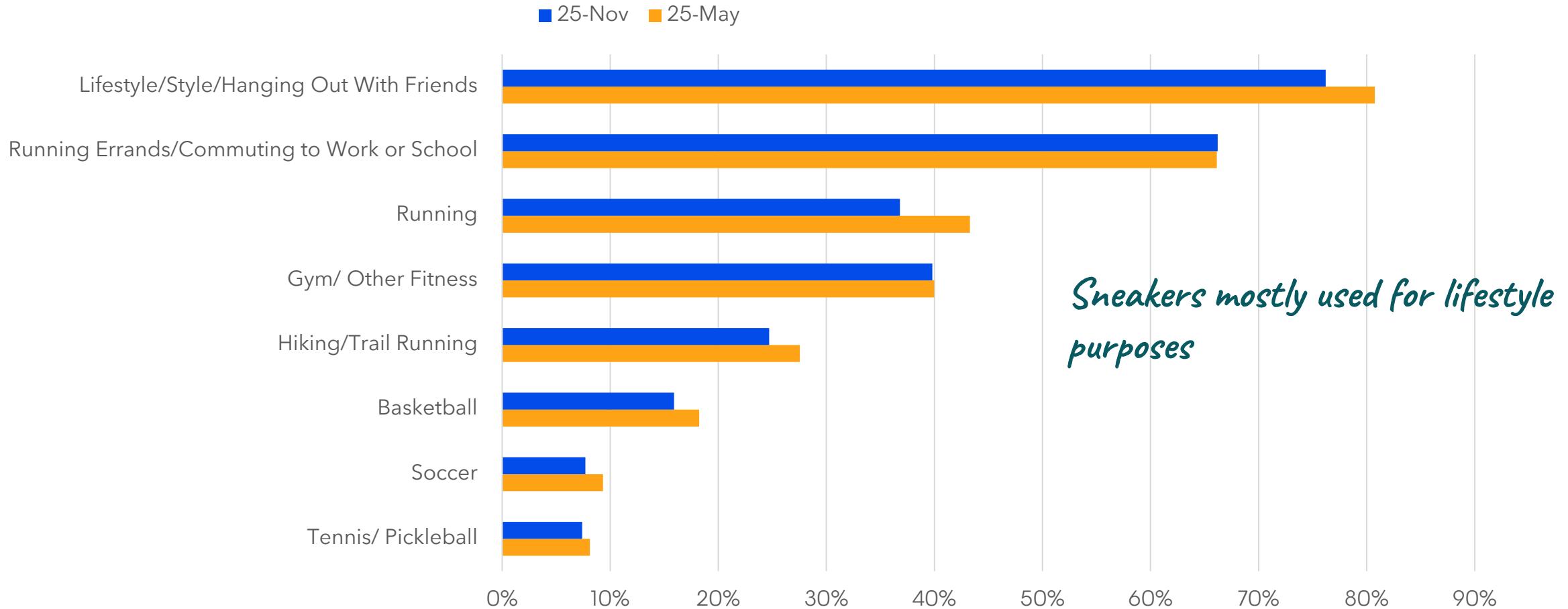
Where do you typically buy your sneakers?



Select the top 3 sneaker brands you have worn in the last 12 months.

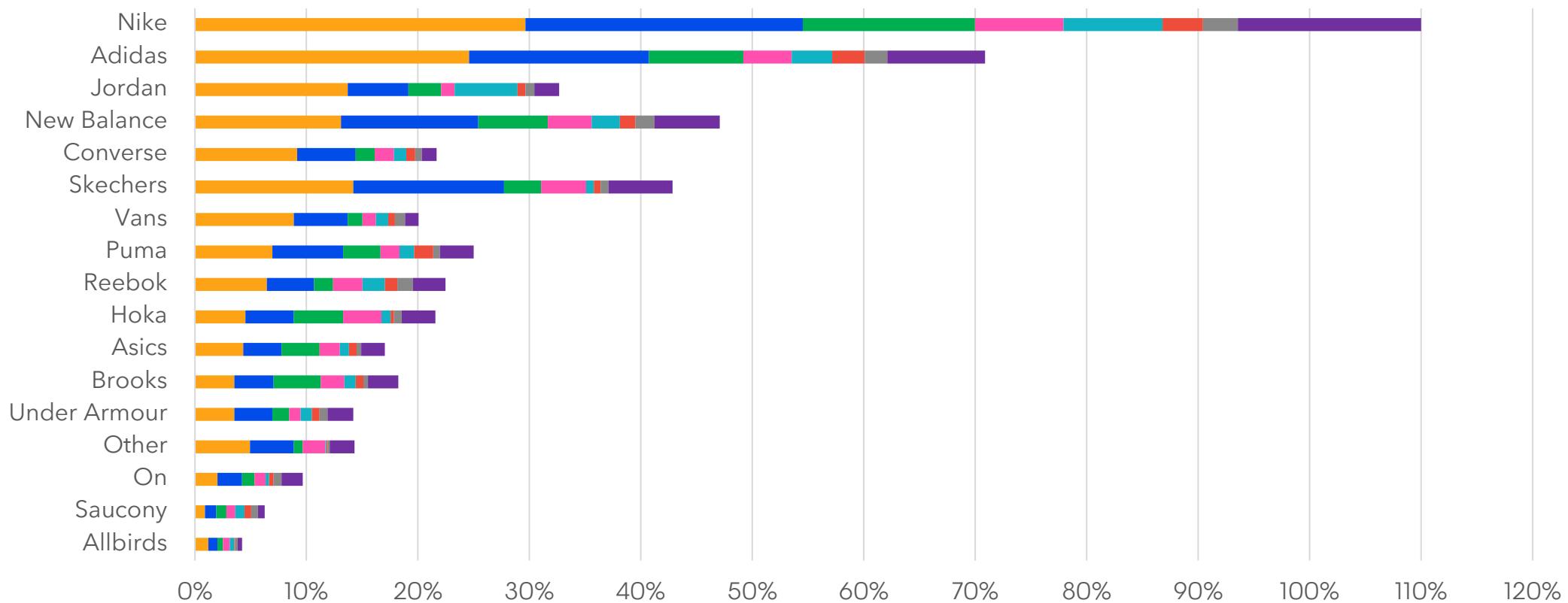


What do you use your sneakers for?

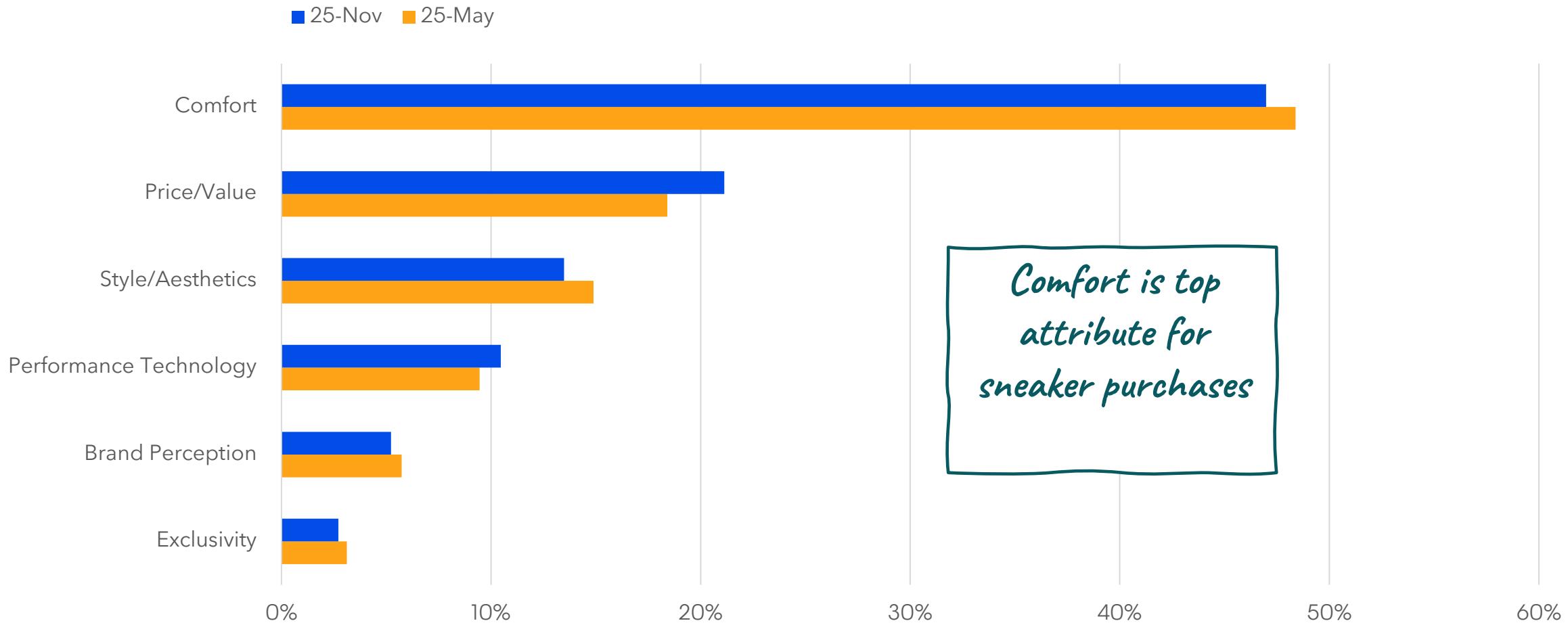


What footwear brand do you wear for...

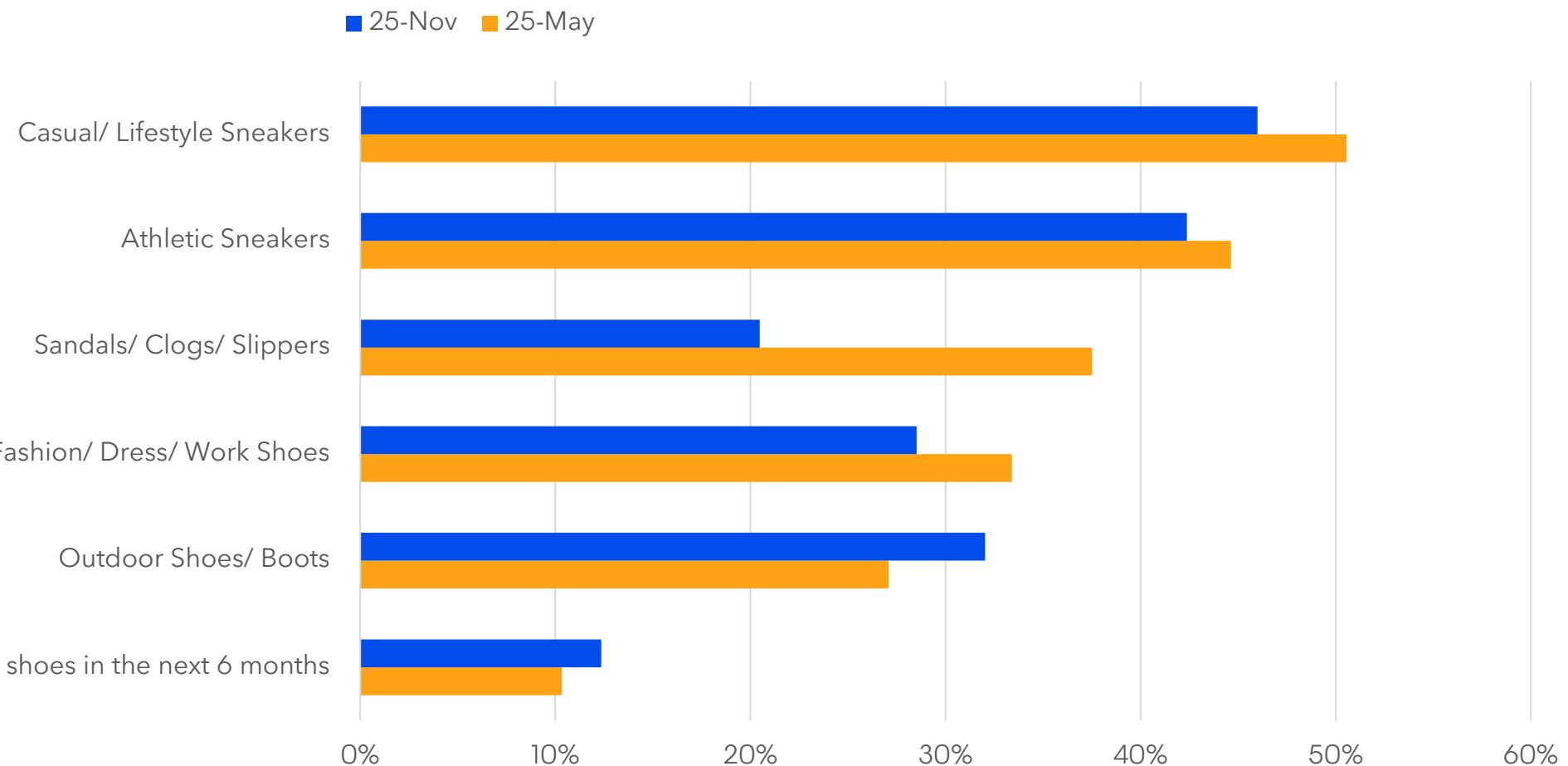
- Lifestyle/Style/Hanging Out With Friends
- Hiking/Trail Running
- Tennis/Pickleball
- Running Errands/Commuting to Work or School
- Basketball
- Gym/Other Fitness
- Running
- Soccer



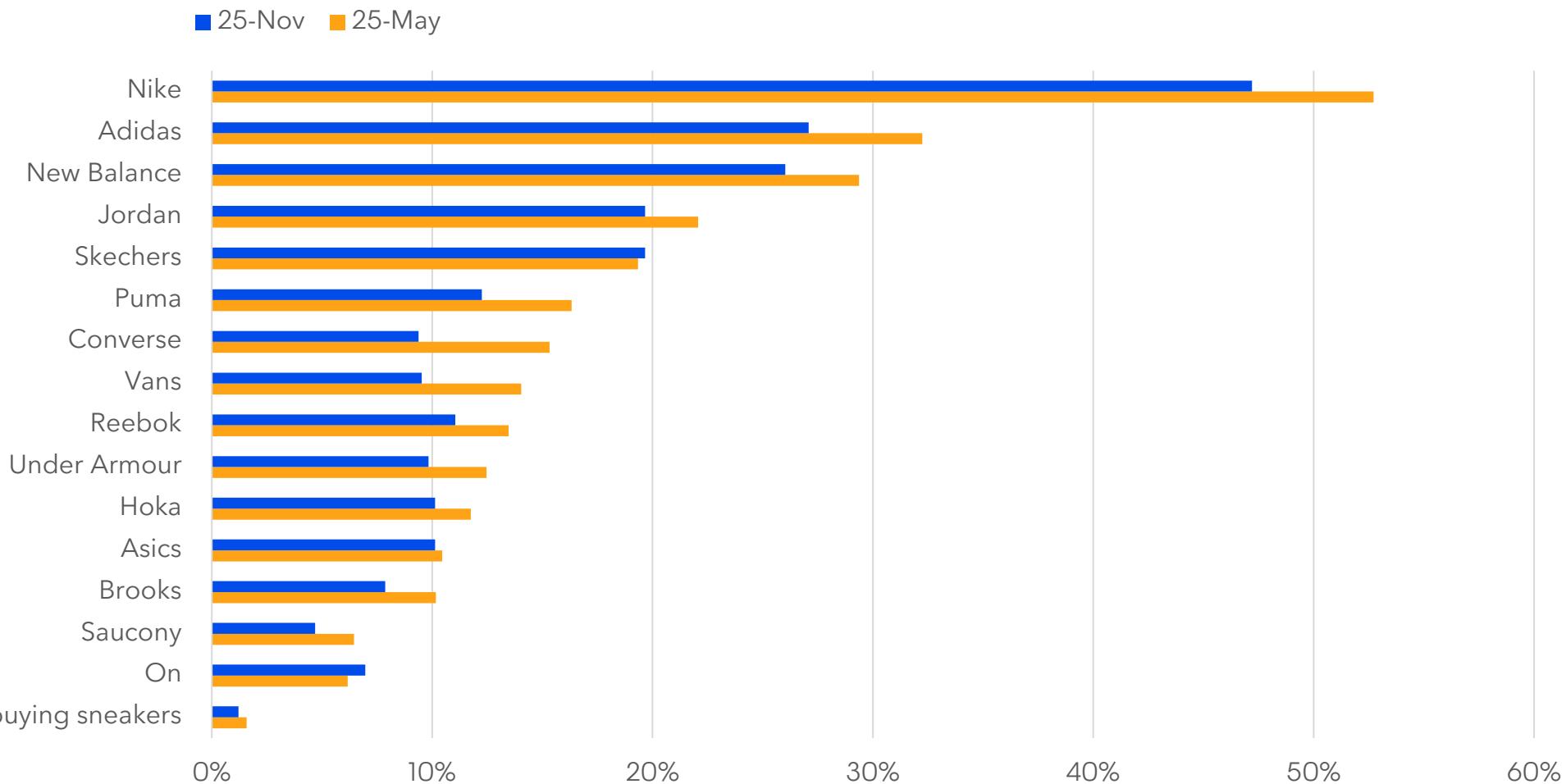
When purchasing sneakers (athletic or lifestyle) which attribute is the most important to you?



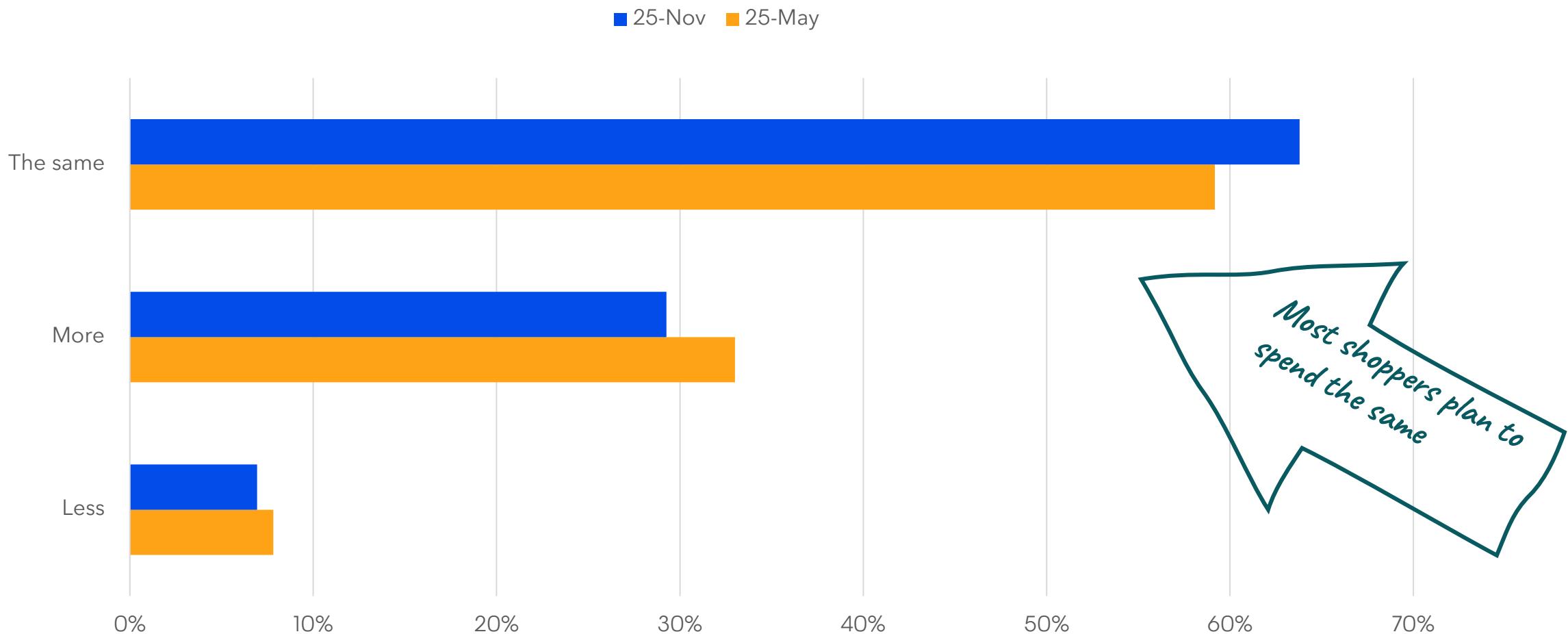
Which of the following types of shoes, if any, are you planning on buying in the next 6 months?



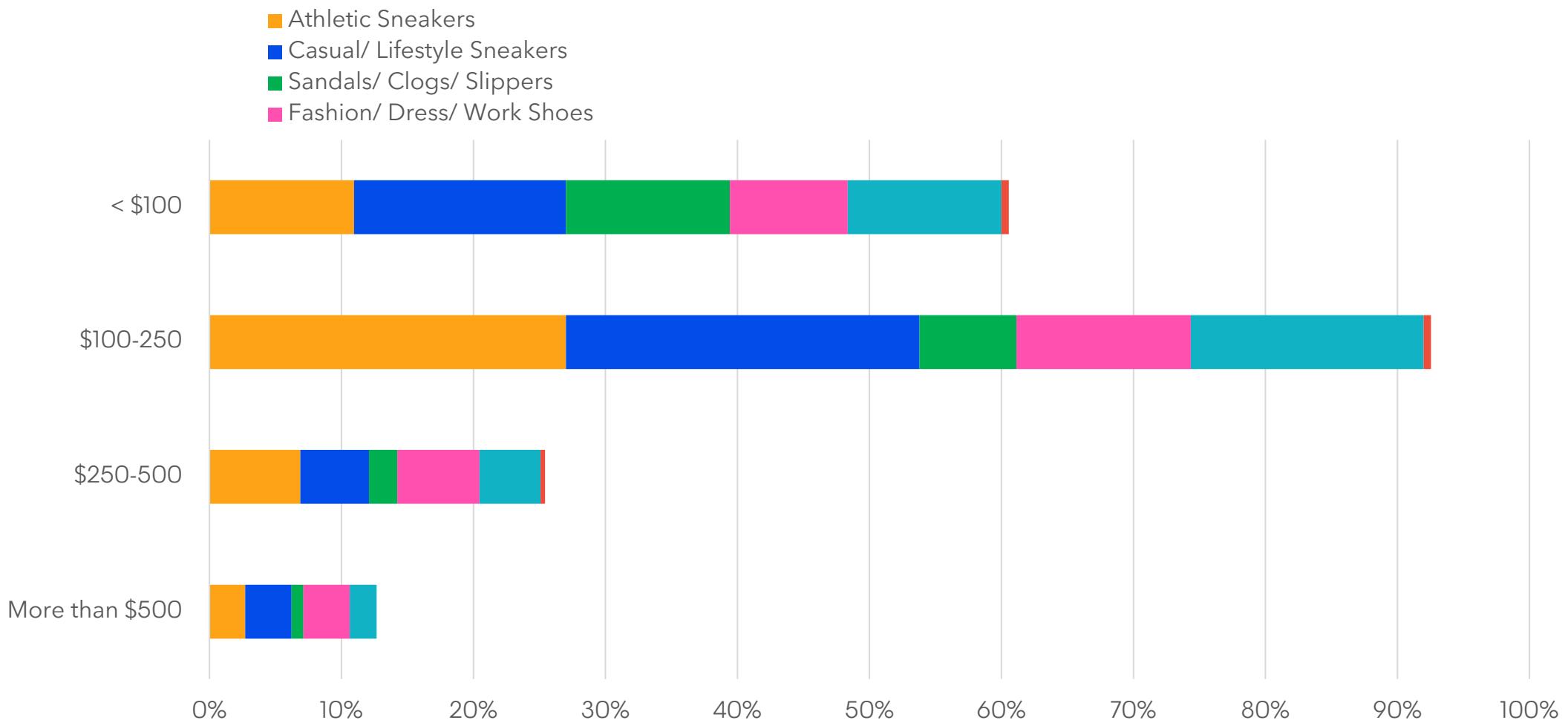
What sneakers brands, if any, are you planning to buy in the next 6 months?



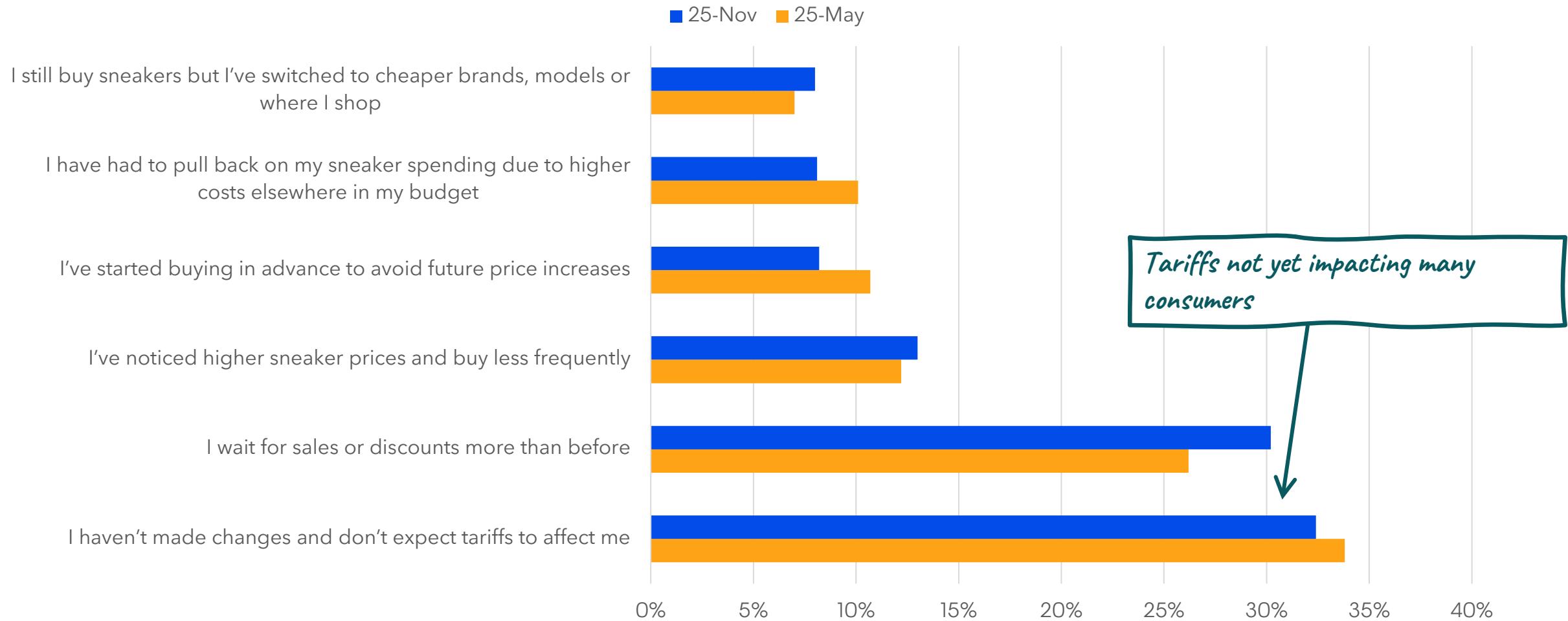
In the next 6 months, how do you expect your spending on sneakers (athletic or lifestyle) to change compared to the past 6 months?



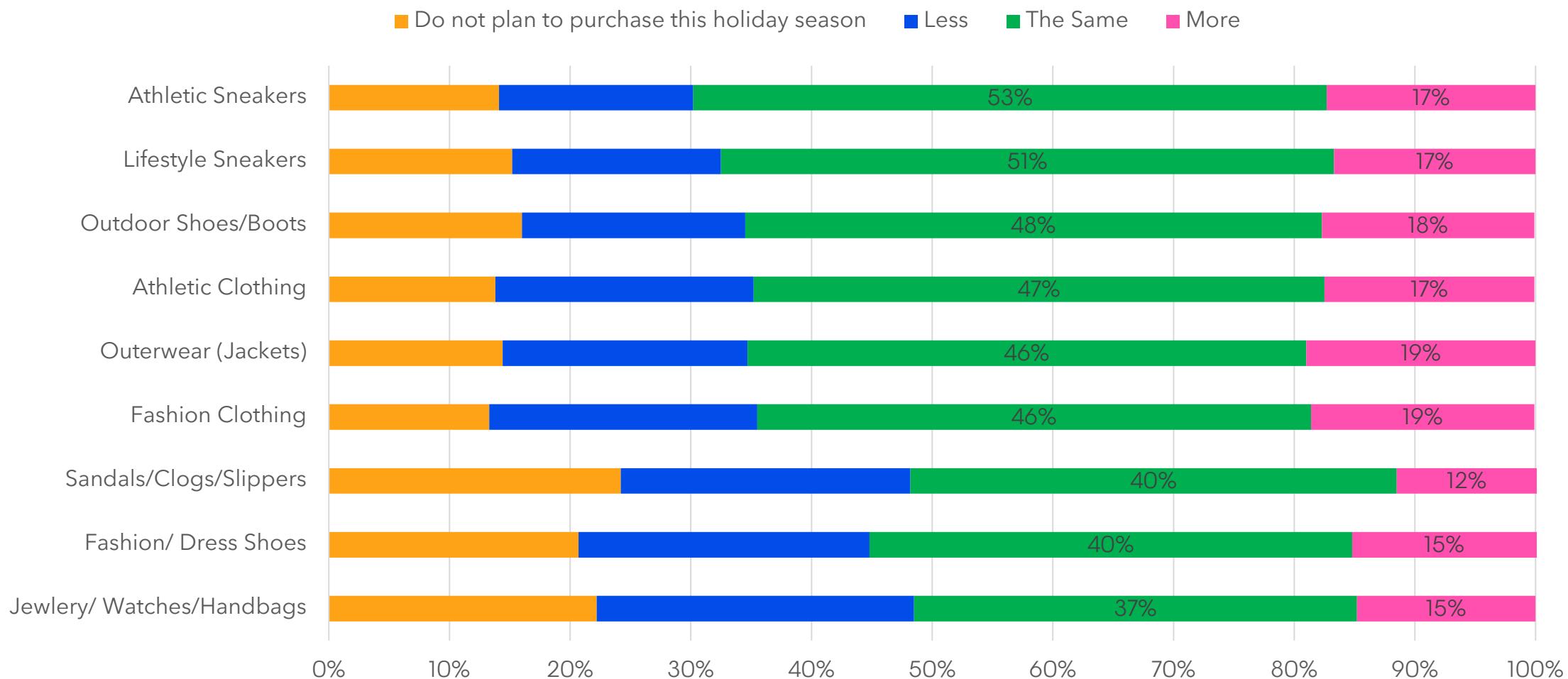
In the next 6 months, How much do you plan to spend on... ?



How have recent U.S. tariffs on imported goods affected your sneaker purchases?



How much do you plan to spend this Holiday season compared to last year on the following categories?



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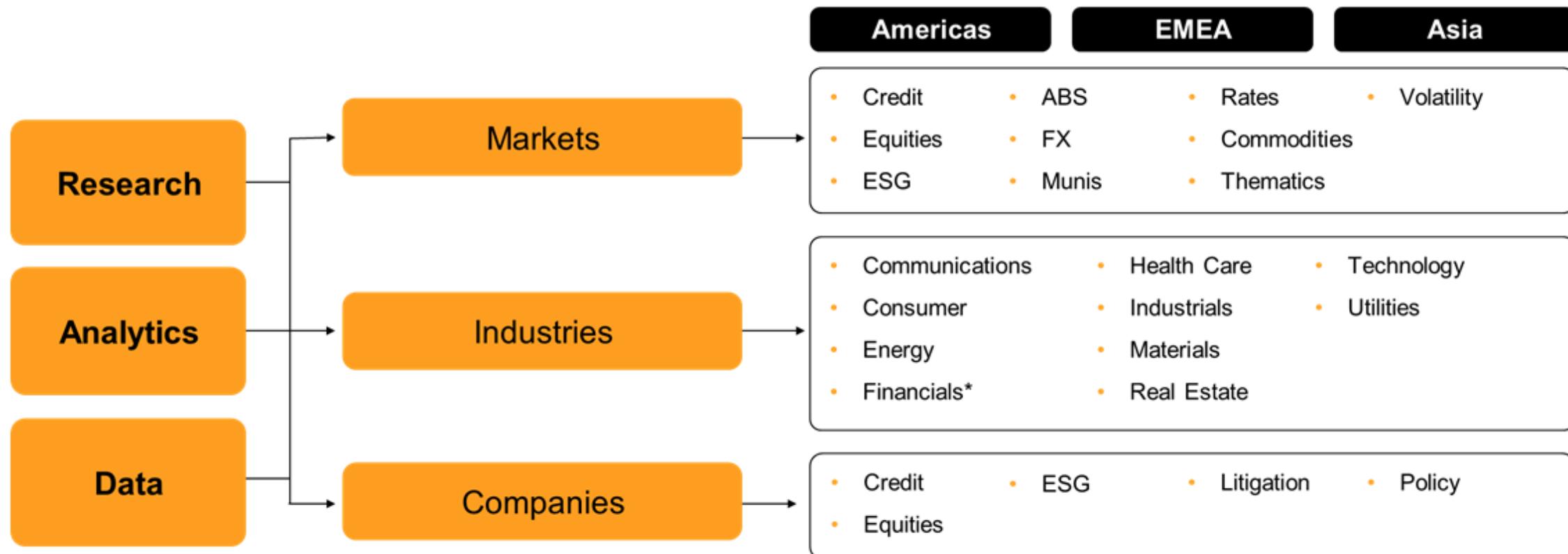
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