500 MILLION GLOBAL USERS

ACROSS THE NIKE APP ECOSYSTEM

THE STACK

REAL PEOPLE.
REAL STORIES.

REAL PEOPLE.
REAL STORIES.

THEY USE SNEAKER APPS BECAUSE THEY CARE—BUT FEELING “LOST” IS BECOMING NORMAL

AS OF LATE 2021, SNKRS ACTIVE USERS REPORTEDLY INCREASED ~56% OVER THE PRIOR YEAR, AND DEMAND INSIDE THE APP ROSE ~70%

BUSINESS INSIDER

SNEAKER APPS EXPERIENCED PEAK ENGAGEMENT DURING THE HEIGHT OF DROP CULTURE, WHEN SCARCITY, HYPE, AND RESALE PREMIUMS CREATED STRONG INCENTIVES TO PARTICIPATE.

THE EXPERIENCE FELT REWARDING, AND CONSUMERS FELT CONFIDENT THAT BEING ACTIVE ON THESE APPS MEANT STAYING "AHEAD" IN THE CULTURE.

NIKE

Nike's "Back to Sport" initiative addresses declining profits and cultural disconnect after relying too much on hype and direct-to-consumer scarcity.

MAINSTREAM FASHION PDF

ADIDAS

Adidas has doubled down on “cultural engineering” and multi-tiered collaborations.

MAINSTREAM FASHION PDF

NEW BALANCE

New Balance leaned into heritage, patience, and timelessness.

NIKE

Nike's "Back to Sport" initiative addresses declining profits and cultural disconnect after relying too much on hype and direct-to-consumer scarcity.

SOURCE

ADIDAS

Adidas has doubled down on “cultural engineering” and multi-tiered collaborations.

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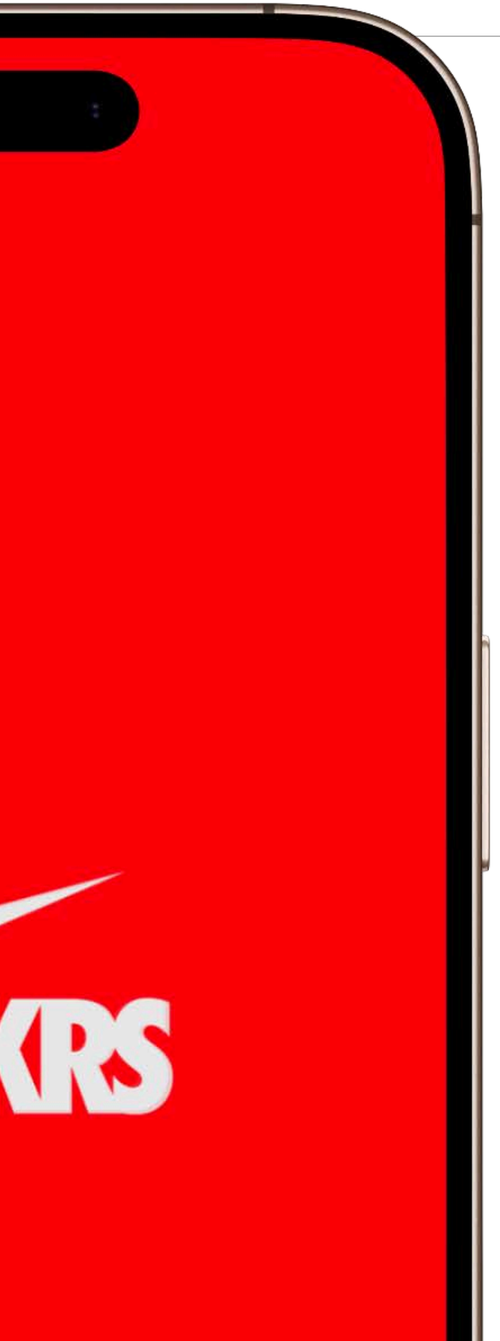
NEW BALANCE

New Balance leaned into heritage, patience, and timelessness.

EACH OF THESE STRATEGIES IS ULTIMATELY TRYING TO DO THE SAME THING:

REBUILD TRUST, CLARITY, AND CONFIDENCE IN AN OVERSATURATED, OVERHYPED MARKETPLACE.

BRANDS ARE LEFT WITH SNEAKER RESERVATION APPLICATIONS LACKING IN POTENTIAL TO CAPITALIZE ON CONSUMERS



HOW SHOULD BRANDS REIMAGINE THEIR SNEAKER RESERVATION APPLICATIONS TO BETTER ALIGN WITH THE ATTITUDES, BEHAVIORS AND BELIEFS OF THIS COVETED YOUNG CONSUMER?

THE SHIFTS IN MAINSTREAM FASHION, STREETWEAR, AND HIGH FASHION AND HOW THAT'S INFLUENCED SNEAKER CULTURE, CONSUMER PREFERENCES, AND SECONDARY MARKET BEHAVIORS.

ACROSS ALL THREE RESEARCH AREAS, WE FOUND THE SAME PATTERN EMERGING:

FASHION HAS FRAGMENTED, CONSUMER PRIORITIES HAVE CHANGED, AND THE OLD RULES THAT USED TO DRIVE SNEAKER DEMAND NO LONGER HOLD.

MAINSTREAM FASHION

FASHION ISN’T LED BY A SINGLE TREND ANYMORE—IT’S A POLYCULTURE

MAINSTREAM FASHION TODAY IS A MIX OF SEEMINGLY CONTRADICTORY MOVEMENTS. INSTEAD OF ONE DOMINANT LOOK, CONSUMERS TOGGLE BETWEEN:

Balletcore and “loud luxury,” led by the rise of hybrid forms like the “ballet sneaker.”
MAINSTREAM FASHION PDF

Low-profile retro runners for the “quiet luxury” and minimalist consumer.
MAINSTREAM FASHION PDF

Chunky Y2K silhouettes embraced by younger buyers.
MAINSTREAM FASHION PDF

Gorpcore, where functional, technical shoes become the new status symbol.
MAINSTREAM FASHION PDF

THIS FRAGMENTATION CREATES A WORLD WHERE MULTIPLE AESTHETICS ARE “CORRECT” AT ONCE.

SNEAKERS AREN'T JUST AN ACCESSORY— THEY'RE THE CLEAREST SIGNAL FOR WHICH AESTHETIC TRIBE A CONSUMER IDENTIFIES WITH.

THIS GIVES SNEAKERS MORE CULTURAL WEIGHT, BUT IT ALSO CREATES MORE OPPORTUNITIES TO FEEL LIKE YOU'RE GETTING THE LOOK WRONG.

STREETWEAR

STREETWEAR'S EVOLUTION ADDED MORE PRESSURE TO "GET IT RIGHT"

THE STREETWEAR CATEGORY—ONCE DEFINED BY REBELLION AND AUTHENTICITY—HAS FULLY MERGED INTO MAINSTREAM FASHION. ITS INFLUENCE IS EVERYWHERE, FROM COUTURE RUNWAYS TO MASS RETAIL.

(NIKE-3))

Several impacts matter for Nike:

Hype still exists, but its meaning has changed.

Streetwear consumers expect exclusivity and inclusivity.

They want access, authenticity, and community not gatekeeping or unattainability

STREETWEAR PDF

CONSUMERS SEEK AUTHENTICITY AND LEGACY ABOVE ALL.

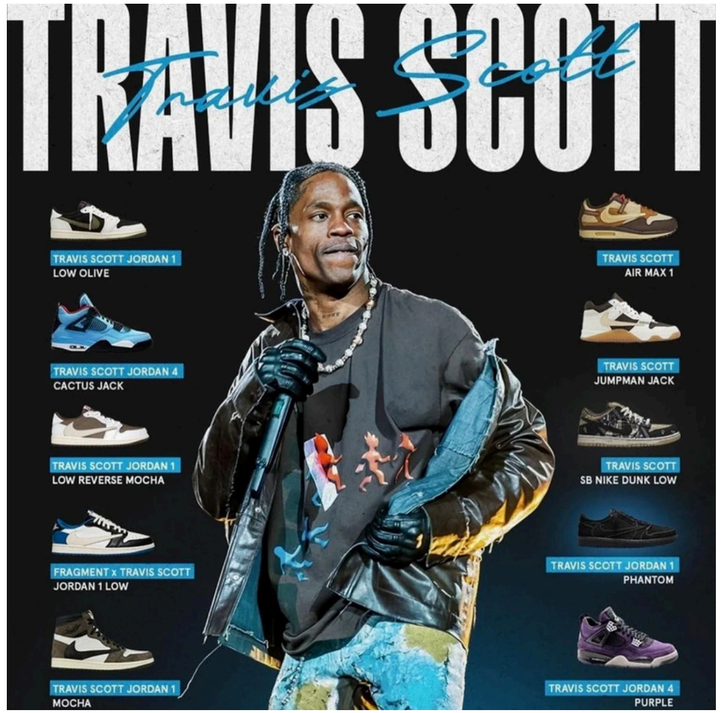
63% OF STREETWEAR SHOPPERS SAY BRAND LEGACY AND CREDIBILITY ARE TOP DECISION DRIVERS—OVER TREND, LOGO, OR HYPE ALONE

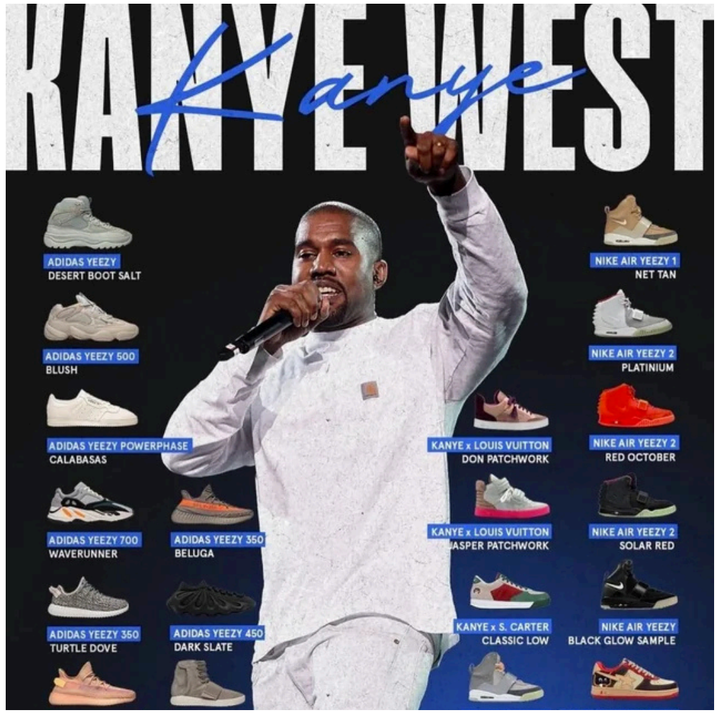
STREETWEAR PDF

INFLUENCE HAS SHIFTED.

MUSIC REMAINS THE STRONGEST INFLUENCE; MUSICIANS ARE SEEN AS MORE CREDIBLE THAN SOCIAL MEDIA INFLUENCERS IN SHAPING SNEAKER TASTE

STREETWEAR PDF





PEOPLE LOVE THE CULTURE, BUT THEY NO LONGER FEEL TOTALLY CONFIDENT NAVIGATING IT.

HIGH FASHION

HIGH FASHION FURTHER COMPLICATES THE LANDSCAPE

LUXURY'S ADOPTION OF SNEAKERS VALIDATED THEM AS STATUS OBJECTS—BUT IT ALSO RAISED THE STAKES.

Luxury collaborations—like Dior x Jordan—showed how sneakers could become luxury assets, but they also taught consumers that:

footwear can be "wrong" for an aesthetic

footwear can be excessively performative

footwear can lose value if styled incorrectly

THE DESIGN TRENDS THEMSELVES ARE TELLING:

THE SHIFT AWAY FROM “UGLY” SNEAKERS INTO PERFORMANCE-DRIVEN, RETRO, AND UNDERSTATED FOOTWEAR UNDERSCORES A BROADER PREFERENCE FOR FUNCTION, QUIET CONFIDENCE, AND WEARABLE LUXURY

HIGH FASHION PDF

The design trends themselves are telling:

Low-profile

Functional

Technically sound

Versatile

Retro-inspired

Understated material quality

THE CULTURE IS MOVING TOWARD CONFIDENCE, WEARABILITY, AND INTEGRATION—NOT SPECTACLE.

INFLUENCE ON CONSUMER PREFERENCES AND SECONDARY MARKET BEHAVIORS

THE SECONDARY MARKET NO LONGER BEHAVES LIKE A HYPE MACHINE—IT BEHAVES LIKE A VALUE MARKET

THE RESALE MARKET USED TO AMPLIFY HYPE. NOW, IT MIRRORS CONSUMERS' DESIRE FOR STABILITY AND MEANINGFUL PURCHASES.

What used to drive resale:

- Scarcity
- Loud branding
- Maximally hyped collaborations

What drives it now:

- Quality and longevity
- Nostalgia and heritage models
- Functionality (Gorpcore)
- Quiet luxury, subtle pairs, and classic silhouettes
- All captured in the data showing the rise of Asics, Salomon, and retro runners in the secondary market

MAINSTREAM FASHION PDF

YOUNGER CONSUMERS MIGHT STILL CHASE HYPE, BUT THE MAJORITY ARE LOOKING FOR: SOMETHING THEY CAN WEAR, STYLE, AND RELY ON. SOMETHING THAT FITS INTO THEIR LIFE— NOT SOMETHING THEY HAVE TO BUILD THEIR LIFE AROUND.

THE CONSUMER HAS CHANGED ALONGSIDE THE CULTURE

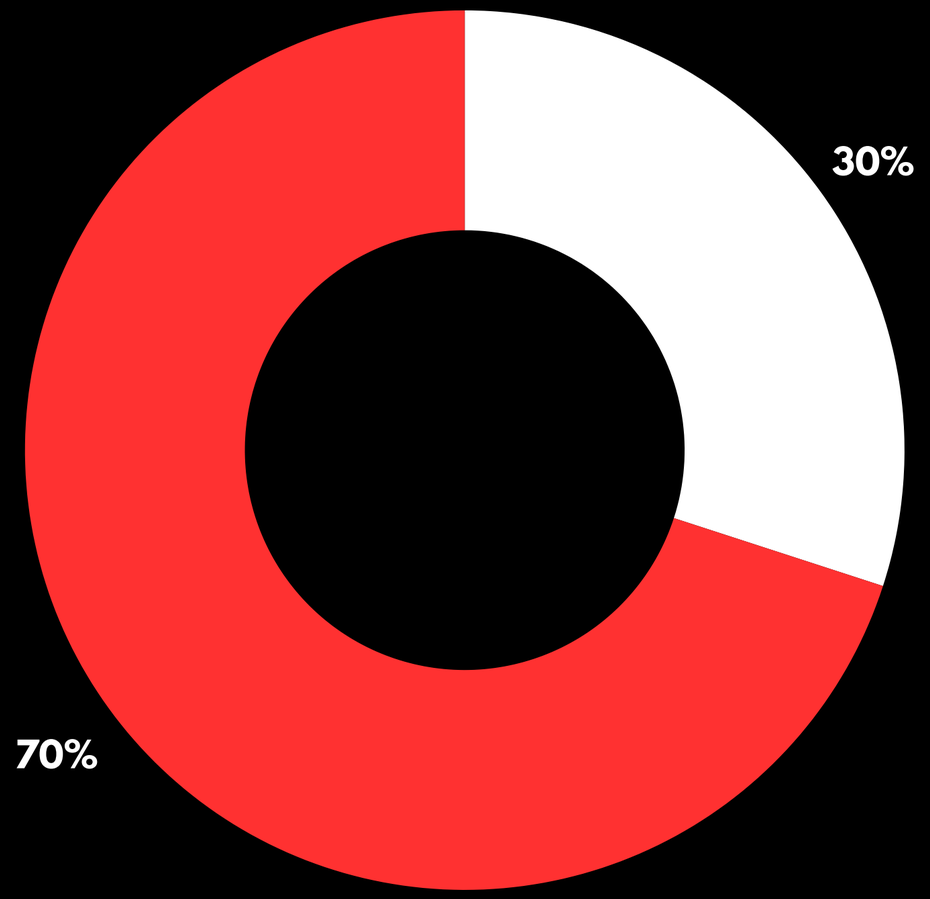
PRICE SENSITIVITY IS AT AN ALL-TIME HIGH.

WHEN WE FOLLOWED THE TRENDS DOWNSTREAM INTO BEHAVIOR, WE SAW MAJOR SHIFTS IN WHAT CONSUMERS VALUE:

70% OF CONSUMERS SAY THEY WOULD HALT A SNEAKER PURCHASE AT EVEN A 5% PRICE INCREASE;

THEY NOW EXPECT ~33% DISCOUNTS ON AVERAGE

MAINSTREAM FASHION PDF



DUPE CULTURE HAS BECOME NORMALIZED AND SOCIALLY ACCEPTABLE

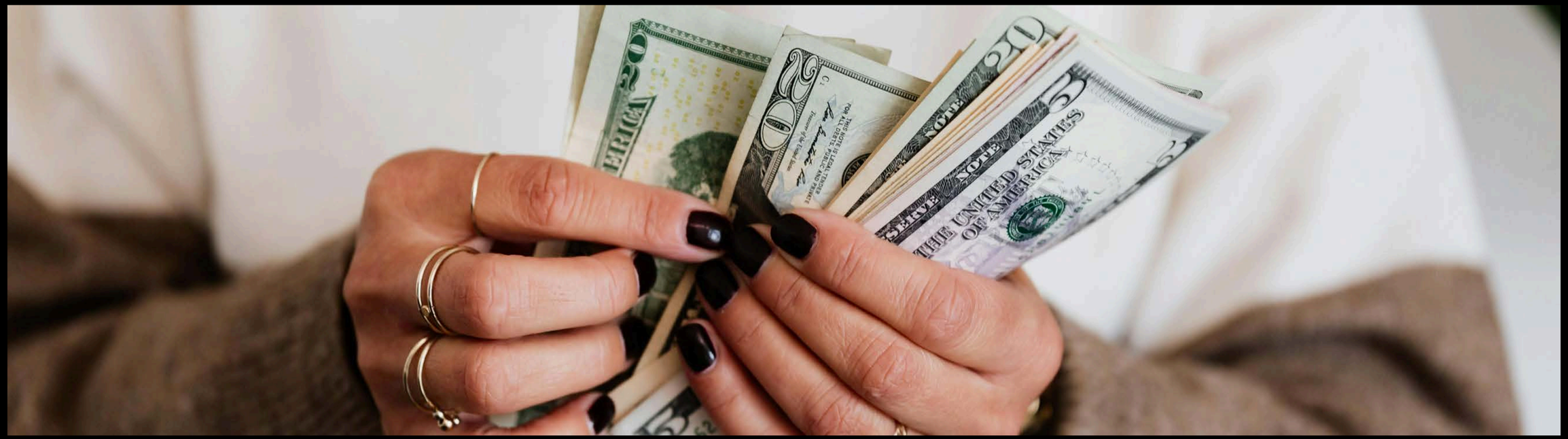
GEN Z SEES BUYING DUPES NOT AS “KNOCKOFFS,” BUT AS “SMART SHOPPING” AND A WAY TO GET THE LOOK WITHOUT THE PREMIUM PRICE OR BRAND EXPECTATIONS.

STREETWEAR PDF

VALUE IS BEING REDEFINED

YOUNG CONSUMERS SAY THEY ARE "VALUE-CONSCIOUS," NOT "PRICE-CONSCIOUS"—MEANING THEY'LL TRADE DOWN ON DAILY ITEMS SO THEY CAN SPLURGE ON SOMETHING EMOTIONALLY MEANINGFUL.

MAINSTREAM FASHION PDF



DURABILITY IS THE NEW SUSTAINABILITY

CONSUMERS DON'T WANT TO PAY MORE FOR "SUSTAINABLE" PRODUCTS, BUT THEY WILL PAY FOR SOMETHING THAT LASTS, WHICH HAS FUELED GROWTH IN RETRO RUNNERS AND GORPCORE STYLES.

MAINSTREAM FASHION PDF

BUYING HAS BECOME MORE CAUTIOUS, MORE INTENTIONAL, AND MORE TIED TO PERSONAL IDENTITY—YET CONSUMERS FEEL LESS CERTAIN ABOUT WHAT ACTUALLY WORKS FOR THEM.

AFTER MAPPING THE SHIFTS ACROSS ALL THREE SYSTEMS, WE REALIZED SOMETHING CONSISTENT:

CONSUMERS ARE OVERWHELMED BY CHOICE, CONFUSED BY SHIFTING AESTHETICS, BURNT OUT ON HYPE, AND UNSURE HOW TO WEAR WHAT THEY OWN.

THE MARKET HASN'T COLLAPSED BECAUSE PEOPLE LOST INTEREST. IT'S STALLED BECAUSE PEOPLE LOST CERTAINTY.

IN A LANDSCAPE DEFINED BY FRAGMENTATION, AESTHETIC PRESSURE, AND CONTRADICTORY INFLUENCES, THE BIGGEST BARRIER ISN'T ACCESS. IT'S CONFIDENCE.

CONSUMERS DON’T NEED MORE SNEAKERS.

CONSUMERS DON'T NEED MORE SNEAKERS.

THEY NEED CONFIDENCE IN HOW TO WEAR THEM.

THE OWNERSHIP–WEARABILITY PARADOX

“COOL” NOW COMES FROM INTEGRATION, NOT ISOLATION

APP FEATURE PRIORITIES BREAK DOWN CONFIDENCE

THE CONFIDENCE TO EXPRESS IDENTITY IS MISSING

THE DUPE ECONOMY SHOWS A CONFIDENCE PROBLEM

VINTAGE MARKET PREFERENCE = CONFIDENCE IN CURATION

THE OWNERSHIP–WEARABILITY PARADOX

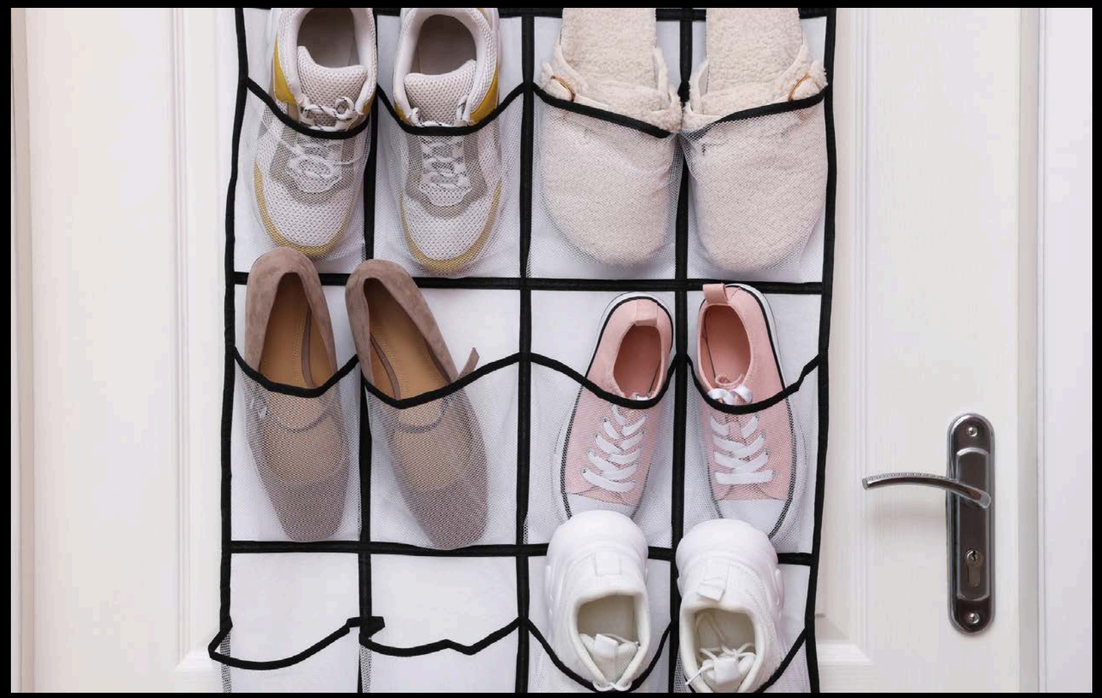
CONSUMERS ARE BUYING SNEAKERS THEY DON’T FEEL COMFORTABLE WEARING.

AROUND 40% OF RESPONDENTS OWN 7–10+ PAIRS BUT REALLY ROTATE JUST 2–3.

Common Reasons:

- “They don’t match my outfits.”
- “They only work for specific occasions.”
- “They limit my outfit options.”
- “I stick to the same accessories I’m comfortable with.”

THIS ISN’T ABOUT STORAGE OR LACK OF VARIETY. IT’S ABOUT UNCERTAINTY. PEOPLE DEFAULT TO WHAT FEELS SAFE BECAUSE THEY DON’T WANT TO RISK A STYLE MISTAKE.



“COOL” NOW COMES FROM INTEGRATION, NOT ISOLATION

WHAT MAKES A SNEAKER “COOL” HAS SHIFTED.

MOST CONSUMERS (ESPECIALLY 35+) RANK “HOW THE SHOE FITS INTO A FULL OUTFIT” AS THE TOP FACTOR.

Common Reasons:

- **“Rarity” and “status” fall to the bottom for this group.**
- **Younger, hype-driven consumers still value rarity—but they’re the minority.**

PEOPLE DON’T WANT TO STAND OUT WITH EXCLUSIVITY. THEY WANT SHOES THAT MAKE THEIR OVERALL STYLE LOOK BETTER. THEY’RE LOOKING FOR CONFIDENCE THAT THE SHOE WILL WORK WITH CLOTHES THEY ALREADY OWN.

APP FEATURE PRIORITIES SHOW EXACTLY WHERE CONFIDENCE BREAKS DOWN

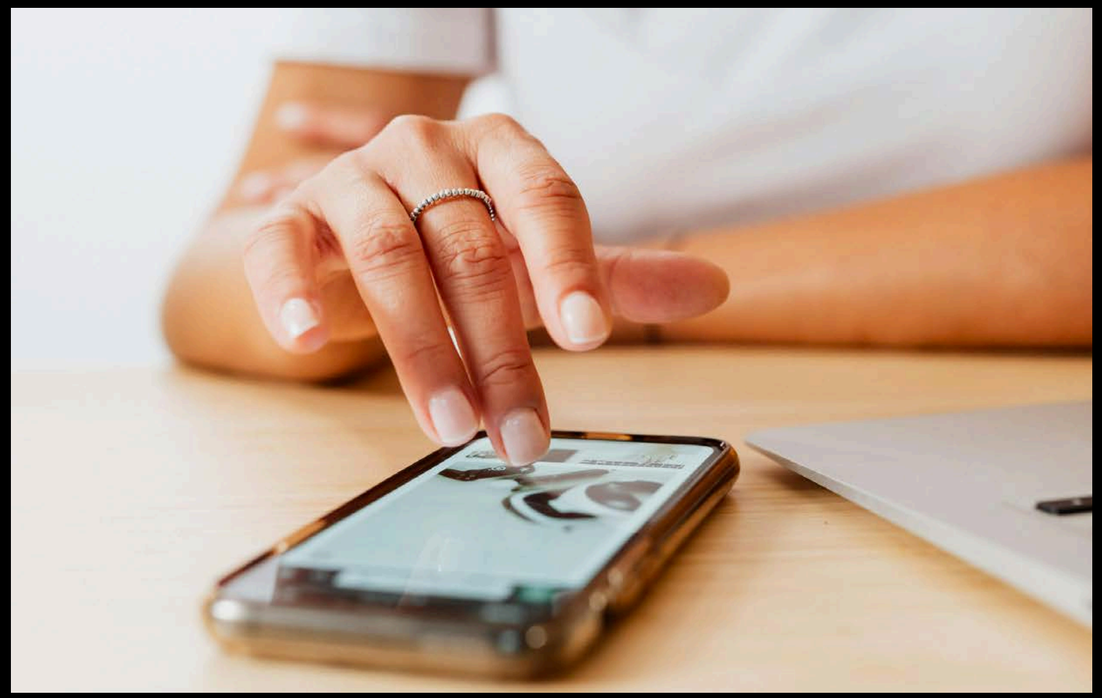
CURRENT SHOPPING APPS DON'T ANSWER THE QUESTIONS THAT MATTER MOST.

PEOPLE WANT REVIEWS, PHOTOS OF SHOES WORN/STYLED, CLEAR SIZING GUIDANCE, USER-GENERATED CONTENT FOR "COMMUNITY."

Examples:

- **R17 wants reviews, styled photos, and sizing notes.**
- **R39 wants product photos paired with real outfits.**

PEOPLE WANT DECISION SUPPORT—NOT MORE CONTENT TO SCROLL THROUGH. THEY NEED PROOF THE SHOE WORKS IN REAL LIFE, WITH REAL OUTFITS, AND WILL FIT AS EXPECTED.



SNEAKERS ARE IDENTITY PURCHASES— BUT THE CONFIDENCE TO EXPRESS THAT IDENTITY IS MISSING

PEOPLE TREAT SNEAKERS DIFFERENTLY FROM REGULAR CLOTHING.

WHEN BUYING CLOTHES: COMFORT AND PRICE COME FIRST. WHEN BUYING SNEAKERS: BRAND NAME AND TRENDS SUDDENLY BECOME MORE IMPORTANT.

Survey Quotes:

- **R24: Sneakers have become a key part of her style.**
- **R32: Uses sneakers to express creativity within a functional wardrobe.**

SNEAKERS ARE EMOTIONAL PURCHASES TIED TO IDENTITY. BUT WHEN CONSUMERS DON'T KNOW HOW TO WEAR THEM CONFIDENTLY, THE EMOTIONAL UPSIDE BECOMES AN EMOTIONAL RISK.

THE DUPE ECONOMY SHOWS A CONFIDENCE PROBLEM, NOT A PRICE PROBLEM

40% OF RESPONDENTS HAVE BOUGHT DUPES, AND THE TOP REASON ISN'T COST.

QUIET LUXURY HAS ALSO NORMALIZED PAYING FOR THE AESTHETIC RATHER THAN THE LABEL. THIS REINFORCES THE IDEA THAT CONSUMERS WANT INTEGRATION AND WEARABILITY ABOVE ALL ELSE.

What we saw:

- **#1 reason: "I liked the style, not the brand."**
- **#2 reason: True price barrier.**

Survey Quote:

- **R8: "I wanted the style but didn't care about the brand."**

PEOPLE WANT THE LOOK BUT DON'T TRUST THE BRAND ENOUGH TO PAY FULL PRICE. THEY'RE UNSURE THE SHOE WILL WORK IN THEIR WARDROBE—AND THE BRAND ISN'T GIVING THEM THE SUPPORT TO FEEL OTHERWISE.

VINTAGE MARKET PREFERENCE = CONFIDENCE IN CURATION

WHEN FORCED TO CHOOSE BETWEEN HYPE AND PERSONAL STYLE, MOST PEOPLE CHOOSE STYLE.

MULTIPLE RESPONDENTS SAID “BUILDING A UNIQUE HEAD-TO-TOE LOOK” MATTERS MORE THAN HYPE.

What we saw:

- **78% chose the vintage market over a shock drop.**
- **Only 4 respondents chose the drop.**

PEOPLE WANT UNIQUENESS, VERSATILITY, AND THE FEELING OF BUILDING A LOOK—NOT THE PRESSURE OF COMPETING FOR SOMETHING RARE. THEY WANT TO CURATE, NOT COLLECT.

THE OWNERSHIP–WEARABILITY PARADOX

PEOPLE DEFAULT TO WHAT FEELS SAFE BECAUSE THEY DON'T WANT TO RISK A STYLE MISTAKE.

"COOL" NOW COMES FROM INTEGRATION, NOT ISOLATION

PEOPLE WANT SHOES THAT MAKE THEIR OVERALL STYLE LOOK BETTER.

APP FEATURE PRIORITIES BREAK DOWN CONFIDENCE

PEOPLE WANT DECISION SUPPORT—NOT MORE CONTENT TO SCROLL THROUGH.

THE CONFIDENCE TO EXPRESS IDENTITY IS MISSING

PEOPLE PURCHASE SNEAKERS EMOTIONALLY TIED TO THEIR IDENTITY.

THE DUPE ECONOMY SHOWS A CONFIDENCE PROBLEM

PEOPLE WANT THE LOOK BUT DON'T TRUST THE BRAND ENOUGH TO PAY FULL PRICE.

VINTAGE MARKET PREFERENCE = CONFIDENCE IN CURATION

PEOPLE WANT UNIQUENESS, VERSATILITY, AND THEY WANT TO CURATE, NOT COLLECT.

WHAT CREATES THE CONFIDENCE GAP?

INFORMATION GAPS

- LIMITED GUIDANCE ON HOW TO STYLE SNEAKERS
- BRANDS FOCUS ON PRODUCT, NOT WEARABILITY

FEAR OF GETTING IT WRONG

- SNEAKERS ARE IDENTITY PURCHASES
- RETURNS ARE ANNOYING, RESALE IS INTIMIDATING

CULTURE INTIMIDATION

- DROP CULTURE FEELS EXCLUSIVE AND COMPETITIVE
- REINFORCED IDEA THAT SNEAKER CULTURE IS A NICHE WORLD

LACK OF TRUST

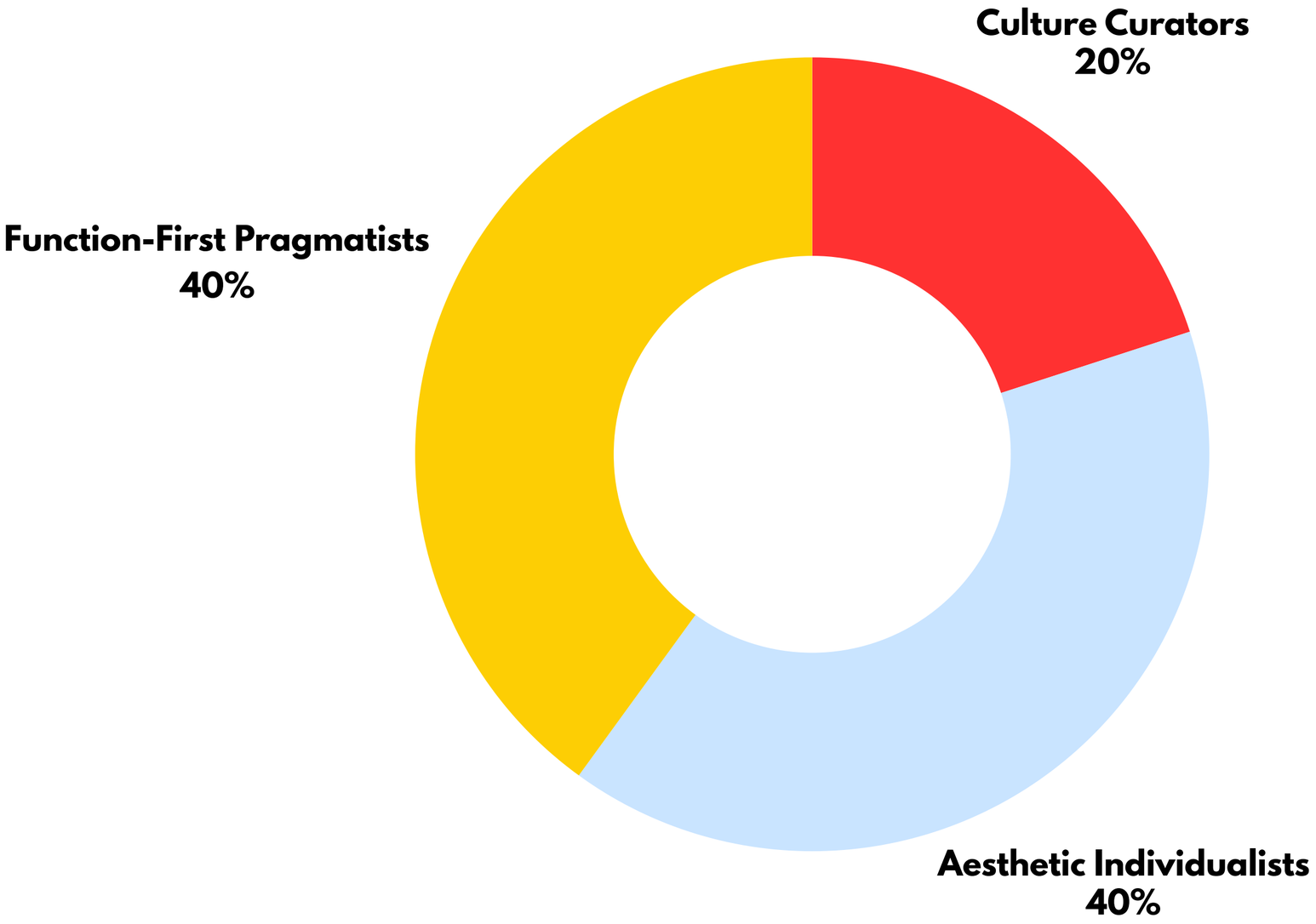
- BRANDS TALK ABOUT HYPE, NOT UTILITY
- CONSUMERS CAN’T VISUALIZE HOW SHOES FITS INTO THEIR LIVES

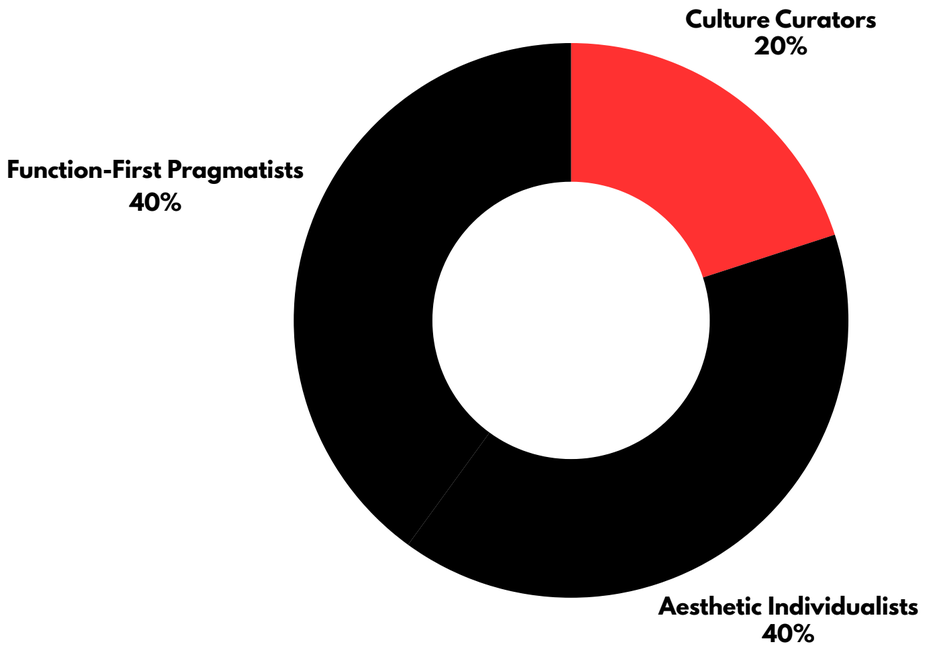
WHAT BUILDS CONFIDENCE?

WHAT BUILDS CONFIDENCE?

- CLEAR STYLING GUIDANCE WITH FULL OUTFIT EXAMPLES
- REVIEWS AND PHOTOS FROM REAL PEOPLE
- BRAND HISTORY AND STORYTELLING THAT MAKE PEOPLE FEEL INCLUDED
- GUARANTEED ACCESS (PRE-ORDERS OVER RAFFLES)
- PREMIUM, APPROACHABLE IN-PERSON EXPERIENCES

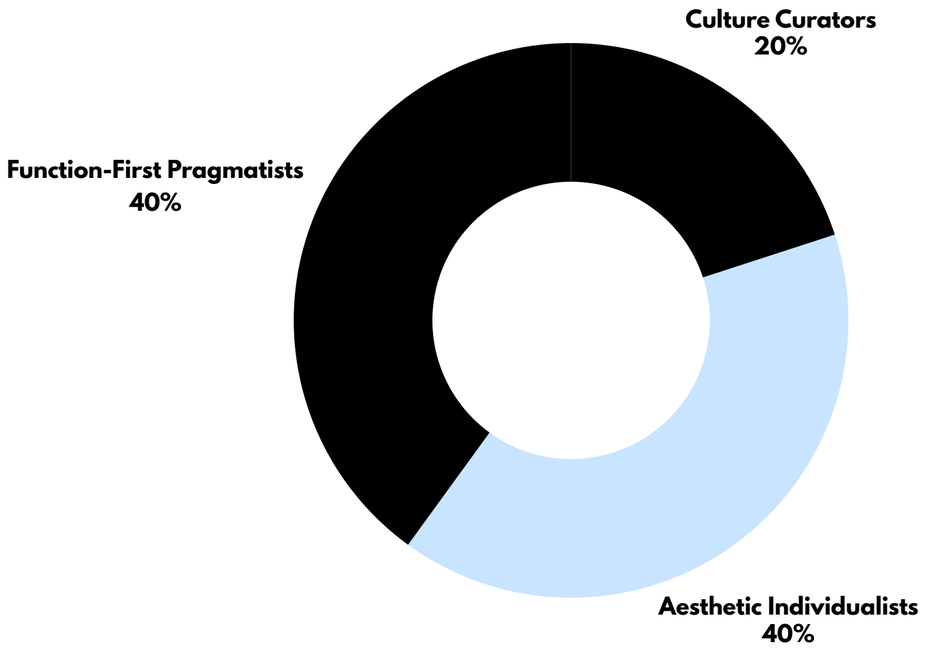
THE THREE-SEGMENT FRAMEWORK


Culture Curators
20%
Function-First Pragmatists
40%
Aesthetic Individualists
40%



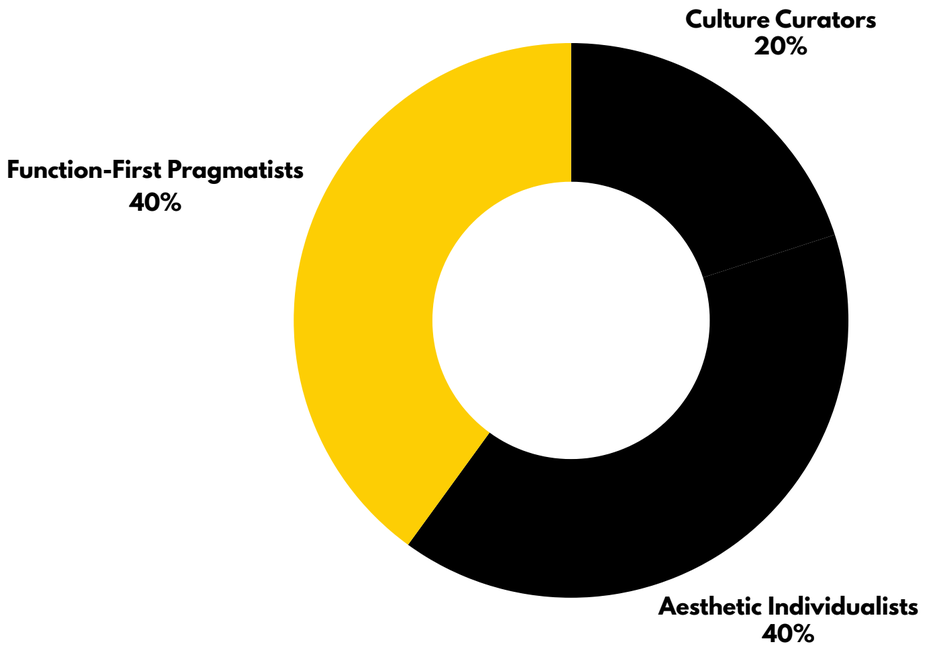
SEGMENT 1: CULTURE CURATORS

- YOUNGER, OFTEN MALE, LOWER–MID INCOME
- MOTIVATED BY RARITY, SOCIAL STATUS, RESALE
- STRONG ACQUISITION CONFIDENCE; WEAKER STYLING CONFIDENCE
- NIKE'S CURRENT STRATEGY IS BUILT AROUND THEM BUT THIS GROUP IS GETTING SMALLER



SEGMENT 2: AESTHETIC INDIVIDUALISTS

- 25–35+, BALANCED GENDER, MID–HIGH INCOME
- WANT SNEAKERS THAT INTEGRATE INTO THEIR EXISTING STYLE
- LOW CONFIDENCE IN STYLING NEW TRENDS → STICK TO “SAFE” OPTIONS
- NIKE LARGELY OVERLOOKS THIS GROUP
- THIS IS THE STRONGEST GROWTH OPPORTUNITY



SEGMENT 3: FUNCTION-FIRST PRAGMATISTS

- 35+, HIGH INCOME
- DISLIKE HYPE AND FEEL DISTANCED FROM SNEAKER CULTURE
- HIGH TASTE CONFIDENCE, LOW SNEAKER-CULTURE CONFIDENCE
- NIKE'S CURRENT MODEL ACTIVELY ALIENATES THEM
- THEY ARE WILLING TO PAY PREMIUM PRICES FOR BRANDS THAT FEEL APPROACHABLE AND EXPERT

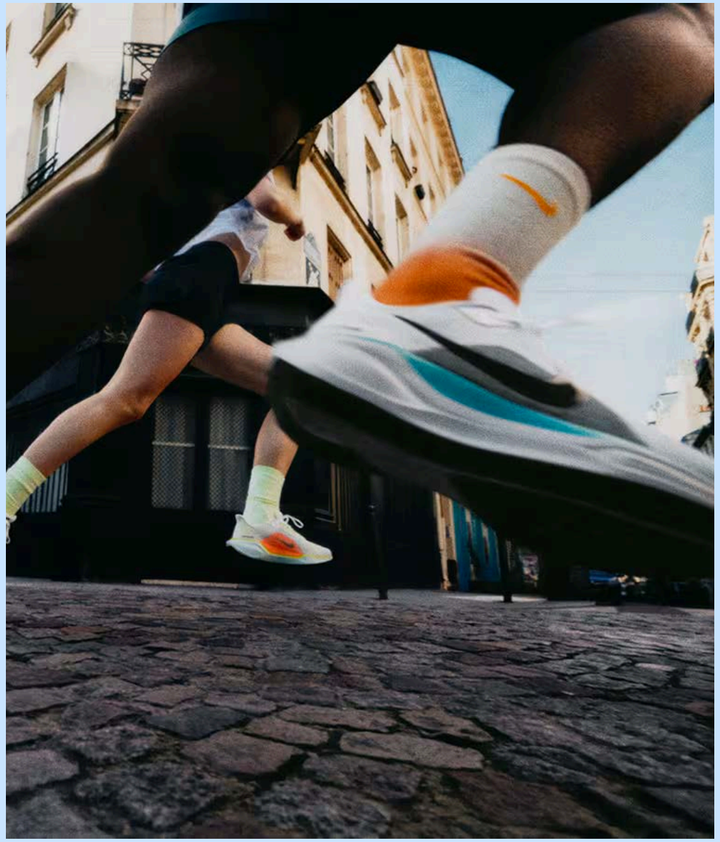
THE NEXT EVOLUTION ISN'T A MORE EXCLUSIVE DROP—IT'S A MORE SUPPORTIVE AND EDUCATIONAL PLATFORM.

NIKE'S CURRENT SYSTEM IS BUILT FOR THE 20% WHO CHASE HYPE, BUT IT EXCLUDES THE MAJORITY WHO WOULD ACTUALLY BUY MORE IF THEY HAD CONFIDENCE.

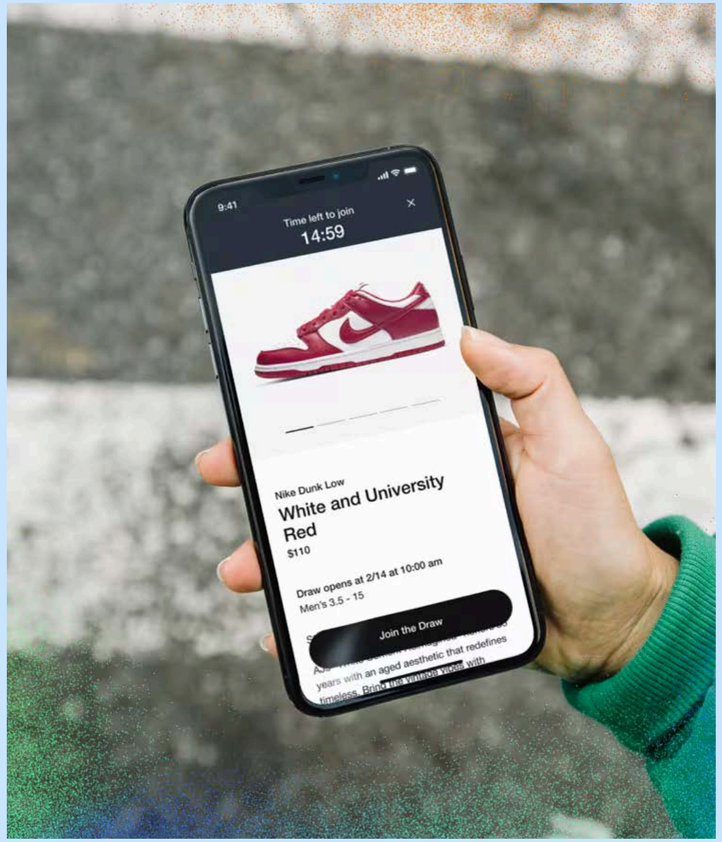
RECOMMENDATION BREAKDOWN

SHIFT FROM “EXCLUSIVITY” TO “CONFIDENCE”

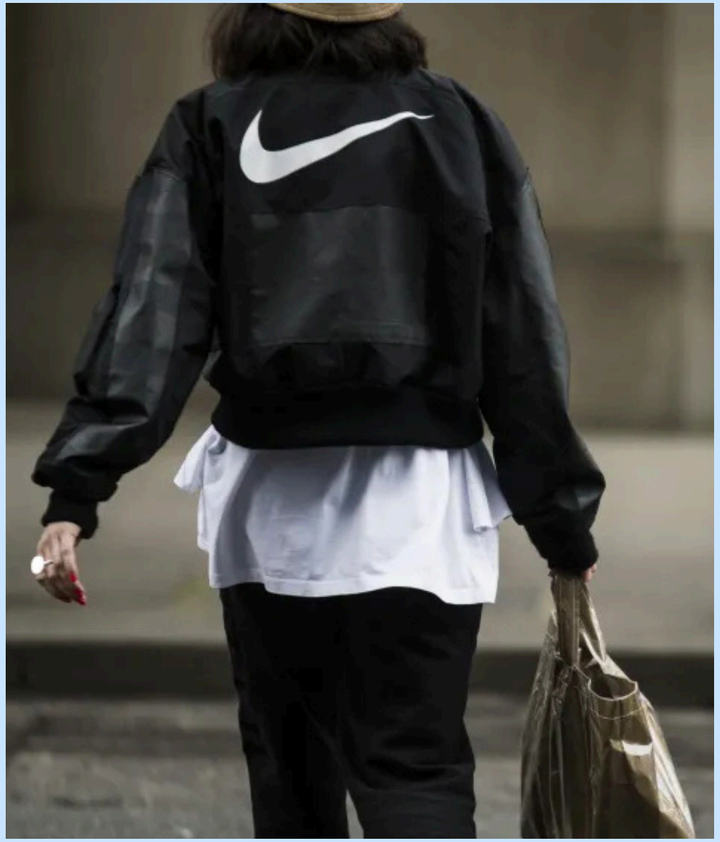
QUICK WINS



PLATFORM EVOLUTION



CULTURE SHIFT



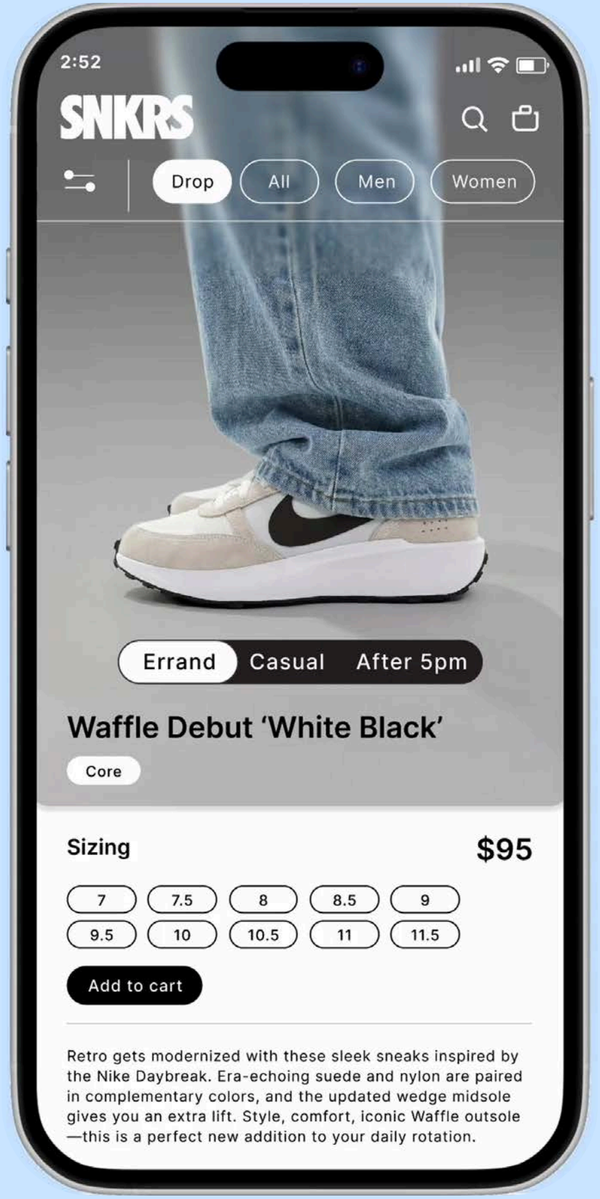
PHASE 1 (0–6 MONTHS): QUICK WINS

FOCUS: REMOVE STYLING PARALYSIS + REDUCE HYPE FRICTION IMMEDIATELY SOLVING

SOLVING STYLING PARALYSIS

Turn SNKRS into a styling hub with outfit examples and styling filters

- **Add the “Style Gym” on product pages for contextual outfit toggling**
- **Real Review Standard: Integrate required on-foot photos and fit/occasion tags into reviews**
- **Add “Complete the Look” full outfit commerce to all styled content**

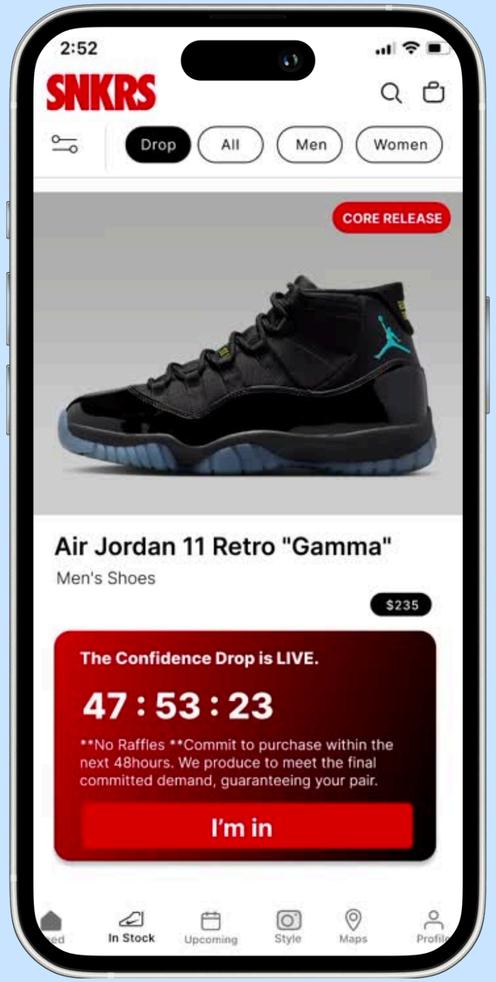


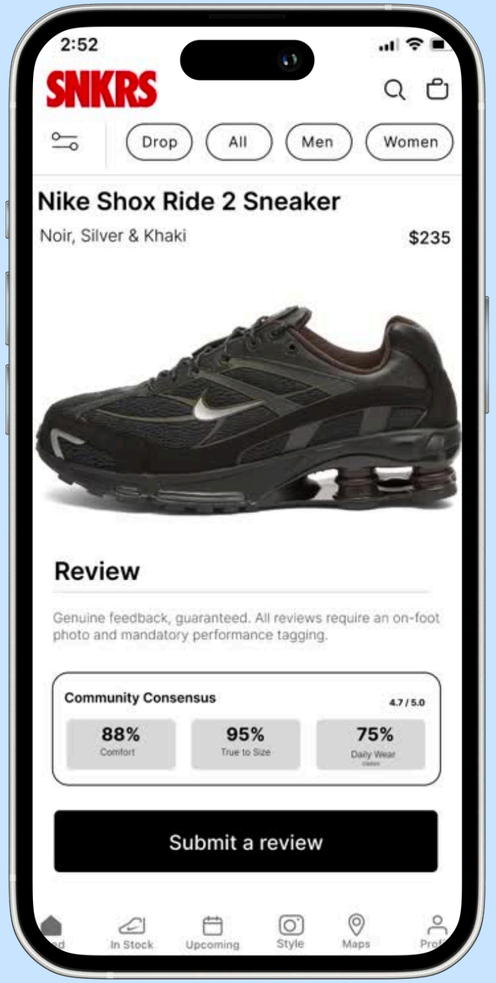
PHASE 1 (0–6 MONTHS): QUICK WINS

FOCUS: REMOVE STYLING PARALYSIS + REDUCE HYPE FRICTION IMMEDIATELY SOLVING

SOLVING THE HYPE TRAP

- Launch the “Confidence Drop” (48-hour pre-order or voting window)
- Establish the Real-Review Standard with photo-verified reviews





PHASE 1 (0–6 MONTHS): QUICK WINS

FOCUS: REMOVE STYLING PARALYSIS + REDUCE HYPE FRICTION IMMEDIATELY SOLVING

SOLVING THE MUSEUM MINDSET

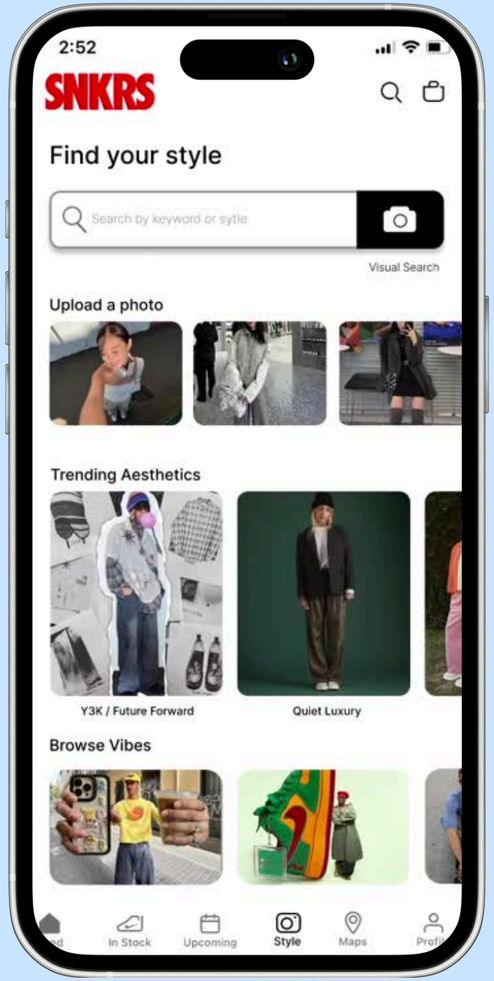
- **Pilot Nike Style Sessions in key cities—local styling workshops**

PHASE 2 (6–12 MONTHS): PLATFORM EVOLUTION

FOCUS: PERSONALIZATION, UTILITY, AND VALUE INFRASTRUCTURE

SOLVING STYLING PARALYSIS

- Roll out “Nike Stylist” AI for closet analysis + visual search (“Shazam for Outfits”)
- Build a network of micro-influencers focused on styling utility

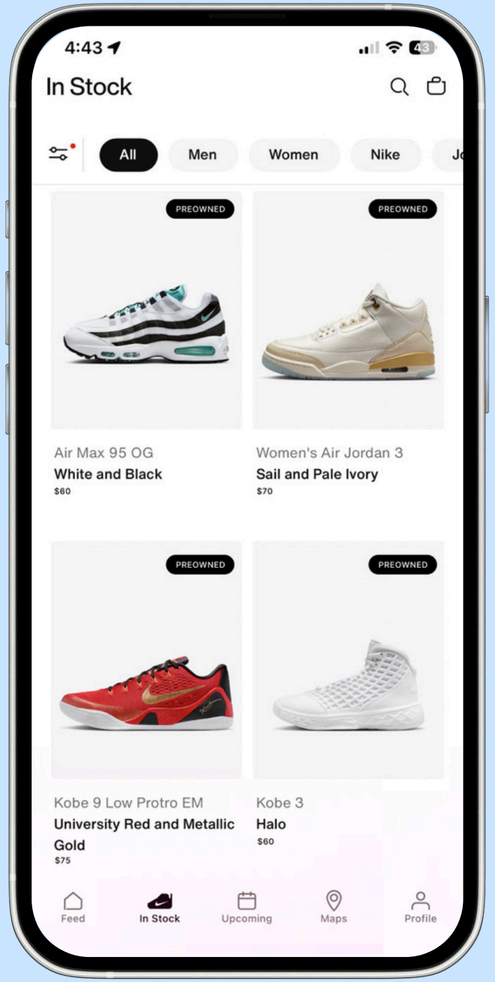


PHASE 2 (6–12 MONTHS): PLATFORM EVOLUTION

FOCUS: PERSONALIZATION, UTILITY, AND VALUE INFRASTRUCTURE

SOLVING THE HYPE TRAP

- Launch “Certified Pre-Worn” (Nike buyback loop + authenticated resale)



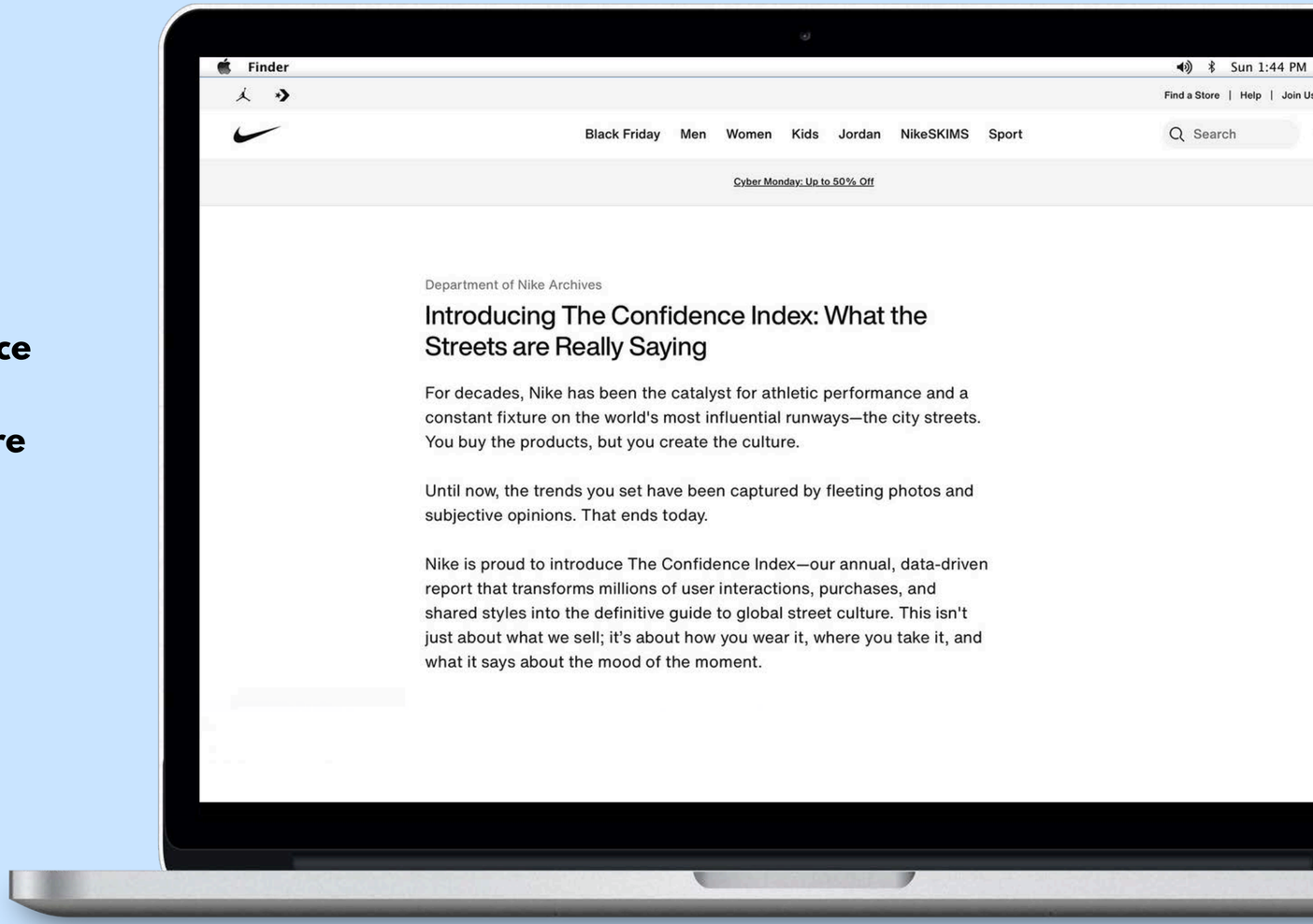
PHASE 3 (12–24 MONTHS): CULTURE SHIFT

FOCUS: REWRITING STATUS + ESTABLISHING NIKE AS THE CONFIDENCE LEADER

NIKE: CONFIDENCE INDEX

It answers questions like:

- **The Global Uniform: Is the Dunk still dominating the East Coast, or has the Cortez taken over the West?**
- **The Unscripted Trend: Which unexpected performance gear is being re-appropriated for everyday style?**
- **The Local Vibe: How does Tokyo's favored fit compare to the mood in London or Lagos?**
- **The Color of Confidence: What specific color-way signals the wearer's current attitude?**



OBJECTIONS & RESPONSES

“SCARCITY DRIVES DEMAND.”

MOST PEOPLE NO LONGER RESPOND TO SCARCITY. VINTAGE MARKETS BEAT SHOCK DROPS BY 78%. DEMAND NOW COMES FROM CONFIDENCE, NOT HYPE.

“WE’RE A SPORTS BRAND, NOT A FASHION BRAND.”

SNEAKERS ARE NOW IDENTITY ITEMS. CONSUMERS DEPRIORITIZE PRICE AND COMFORT WHEN BUYING THEM. NIKE CAN LEAD BY HELPING PEOPLE EXPRESS THAT IDENTITY.

“THIS WILL BE EXPENSIVE.”

THE CURRENT MODEL IS ALREADY CREATING COSTLY ISSUES: RISING DUPE PURCHASES, LOWER APP ENGAGEMENT, AND UNWORN PRODUCT. CONFIDENCE-BUILDING INCREASES AOV, LOYALTY, AND WEARABILITY.

THIS ISN’T A MARKETING TWEAK— IT’S A BUSINESS MODEL SHIFT.

NIKE HAS RELIED ON HYPE FOR TOO LONG AND LOST GROUND WITH THE CONSUMERS WHO ACTUALLY DRIVE LONG-TERM VALUE.

THE PATH FORWARD IS CLEAR: BUILD CONFIDENCE, NOT EXCLUSIVITY.

THANK YOU

APPENDIX

THIS APPENDIX COMPILES THE RESEARCH SUPPORTING OUR FINDINGS ACROSS:

Mainstream fashion

Streetwear

High fashion

Consumer preferences

Secondary market

Brand strategy movements

Sneaker app usage

Emotional context

MAINSTREAM FASHION: HYBRID SNEAKERS

Sources:

- Mainstream Fashion PDF

Key points:

- Rise of balletcore + sneaker hybrids (“sneakerina”)
- Growth led by Japan and South Korea
- Key collabs: Sandy Liang x Salomon, Puma Speedcat Ballet

MAINSTREAM FASHION: RETRO RUNNER SPLIT

Sources:

- Mainstream Fashion PDF

Key points:

- Quiet Luxury → low-profile silhouettes (Adidas Samba, Puma Speedcat)
- Y2K Bold → chunky runners (Air Max 95 OG, platforms)

GORPCORE AS THE NEW LUXURY

Sources:

- Mainstream Fashion PDF

Key points:

- Performance sneakers as status symbols
- Salomon XT-6 leading the category
- Technical function driving cultural relevance

CONSUMER PREFERENCES: PRICE SENSITIVITY

Sources:

- Mainstream Fashion PDF

Key points:

- 70% pause a purchase at a 5% price increase
- Expected discount = 33%
- Inflation reshapes shopping behavior

CONSUMER PREFERENCES: DUPE ECONOMY NORMALIZATION

Sources:

- Mainstream Fashion PDF

Key points:

- Dupes seen as practical, not shameful
- “Get the look” outweighs logo loyalty
- Gen Z shifts toward value-conscious shopping

CONSUMER PREFERENCES: DURABILITY & LONG-WEAR VALUE

Sources:

- Mainstream Fashion PDF

Key points:

- Durability = perceived value
- Consumers reject sustainability premiums but will pay for long lifecycle
- Boosts Gorpcore & utility silhouettes

SECONDARY MARKET: DECLINING HYPE ECONOMICS

Sources:
Mainstream Fashion PDF
Key points:

- **Only 47% of releases resell above retail (down from 58% in 2020)**
- **Profits dropped from 100%+ to 10–25%**
- **Hype is no longer a reliable driver**

SECONDARY MARKET: BRAND POWER REORDERING

Sources:

- Mainstream Fashion PDF

Key points:

- Asics up 645%
- Salomon up 53%
- Anta up 1,901% (Kyrie “Kai 1”)
- Nike/Jordan resale share down from 71.3%

BRAND STRATEGY SHIFTS: NIKE

Sources:

- **Mainstream Fashion PDF**

Key points:

- **Pullback from wholesale created isolation**
- **Resulted in 44% profit drop**
- **Current pivot: “Back to Sport” + heritage**

BRAND STRATEGY: ADIDAS

Sources:

- **Mainstream Fashion PDF**

Key points:

- **3-tier cultural strategy:**
  - **High fashion**
  - **Pop culture**
  - **Hype/core**
  - **Engineered pipeline of cultural heat**

BRAND STRATEGY: NEW BALANCE & HOKA

Sources:

- **Mainstream Fashion PDF**

Key points:

- **New Balance:**
  - **Embraced “dad shoe” identity**
  - **Teddy Santis + ALD elevated fashion credibility**
- **Hoka:**
  - **Solved a niche performance problem first**
  - **Scaled into fashion through credibility**

STREETWEAR: MAINSTREAM INTEGRATION

Sources:

- Streetwear PDF

Key points:

- Streetwear is mainstream, not a subculture
- Sneakers = identity statements
- Authenticity and legacy matter

STREETWEAR: INFLUENCE DRIVERS

Sources:

- Streetwear PDF

Key points:

- Music > influencers in shaping taste
- Anti-gatekeeping mindset
- Brand history = credibility

HIGH FASHION: SNEAKER INTEGRATION

Sources:

- High Fashion PDF

Key points:

- Luxury x sneaker collabs (e.g., Dior Jordan)
- Quiet luxury → minimal branding, high materials
- Performance-tech silhouette crossover

SNEAKER APP USAGE: PEAK YEARS

Sources:

- Business Insider (SNKRS fairness shift)
- https://www.businessinsider.com/nike-making-snkrs-app-fairer-fighting-bots-2021-12
- The Stack Technology (Nike app ecosystem)
- https://www.thestack.technology/nike-hits-500-million-app-users

Key Stats:

- SNKRS active users up 56% YoY (2021)
- In-app demand up ~70%
- Nike app ecosystem = 500M global users (2023)

SNEAKER APP USAGE: EMOTIONAL REALITIES (2025)

Synthesis from consumer interviews & cultural trend analysis:

- Feeling shut out by insiders/bots
- Overwhelmed by trend fragmentation
- Fear of “wearing it wrong”
- Frustration with unpredictable access
- Loss of joy in discovery
- Sense that sneaker apps “aren’t built for them anymore”

CULTURAL & EMOTIONAL CONTEXT SUMMARY

- Belonging + identity = core drivers
- Current ecosystem amplifies exclusion
- Market shifts pressure consumers
- All signals point toward a core unmet need: confidence