SPECIAL REPORT

2024 US Footwear and Apparel Brand Heat Index

Contents

About L.E.K. Consulting
We're L.E.K. Consulting, a global strategy consultancy working with business leaders to seize competitive advantage and amplify growth. Our insights are catalysts that reshape the trajectory of our clients' businesses, uncovering opportunities and empowering them to master their moments of truth. Since 1983, our worldwide practice — spanning the Americas, Asia-Pacific and Europe — has guided leaders across all industries from global corporations to emerging entrepreneurial businesses and private equity investors. Looking for more? Visit **www.lek.com**.

About the Brand Heat Index

Each generation has unique perspectives on the brands they desire and the factors that are most important to them in making brand purchase decisions. L.E.K. Consulting's third annual Brand Heat Index reveals which brands are gaining popularity (i.e., increasing their brand "heat") across major product categories in women's and men's footwear and apparel, and it uniquely identifies how "brand heat" differs by generational cohort. The insight provided by the Brand Heat Index is intended to bring a more nuanced view to brand trajectory and what drives it, which should ultimately enhance strategic decision-making.

The Brand Heat Index is based on a survey of nearly 4,000 U.S. consumers between the ages of 14 and 55. Within product categories and generational cohorts, each brand earns a heat score expressed on a scale of 0-100 — the higher the score, the hotter the brand. Notably, the Brand Heat Index identifies brands that are on the steepest positive trajectory with shoppers, not necessarily their relative size or scale.

The survey gathers feedback on brands across four product categories: athletic, casual, outdoor/rugged[1] and dress.

Category definitions

Use case category	Footwear examples	Apparel examples
Athletic	Running shoes, cross-trainers, basketball shoes, cleats	Performance tops, athletic shorts, joggers, leggings, surf/skate clothing
Casual	Sandals, slip-ons, casual flats, casual sneakers, chukka boots	Denim, cotton T-shirts, sweaters, Oxford shirts, khakis
Outdoor/ rugged	Hiking boots, trail shoes, winter boots	Hiking clothes, fishing clothes, fleeces, performance jackets
Dress	Heels, loafers, Oxfords	Suits, dresses

Performance in this year's Brand Heat Index revealed several noteworthy trends:

- Consumers continue to demand a lot from footwear and apparel brands. While comfort is a top purchase criterion across most footwear and apparel categories, brand reputation and style are most often cited as the drivers of a brand's popularity. In order to succeed, apparel and footwear businesses not only need appealing form and function but must also drive true affinity and engagement with the brand above and beyond the product itself.

- This year, legacy brand leaders continue to feel the heat from relative newcomers, suggesting these emerging brands have staying power. After initially surpassing Nike last year, On Running remains on top in women's athletic footwear, while lululemon is closing the gap versus Nike in women's athletic apparel (with HOKA and alo not far behind in their respective categories). The shake-up isn't just in the athletic space, as Reformation has now replaced Michael Kors as the top brand in women's dress apparel.

- Fast fashion continues its strength in casual apparel, with SHEIN and UNIQLO being joined by new names like Princess Polly and Cider. Social media and digital marketing have catalyzed these brands' rise to the top, which has prompted other brands (e.g., Steve Madden, UGG, Tommy Hilfiger) to develop similar strategies, creating a resurgence with younger generations.

- Importantly, brand heat scores can vary meaningfully across genders and generations. For example, Cole Haan and Ariat have much stronger performance in men's footwear than in women's footwear, while UGG performs differentially well with women. From a generational perspective, Vionic, OOFOS and Skechers are in the top 10 with Generation X but don't have the same appeal among members of younger generations.

In the data that follows, the top 10 footwear and apparel brands are ranked by their heat scores within each product category — both in total and by generational cohort. **How does your brand stack up?**

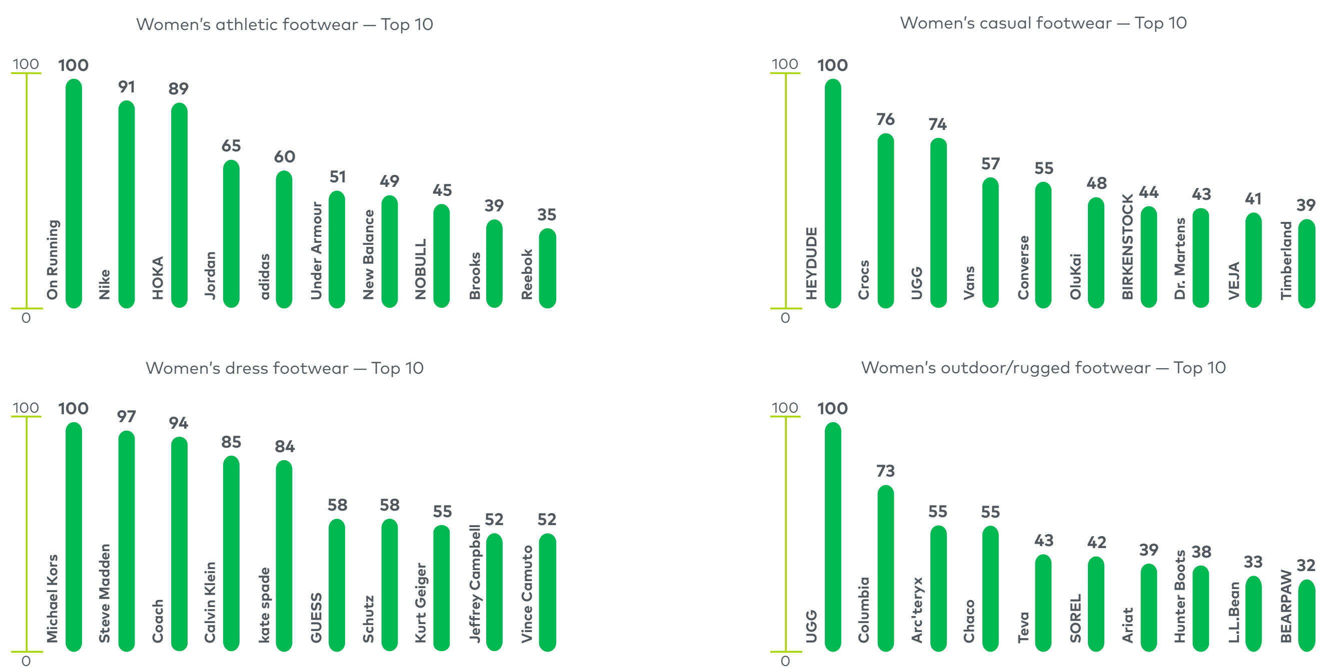
Footwear

In 2024, competition in the footwear space has become increasingly fierce, with brand heat scores tightly packed among the leading brands, even in categories (such as athletic footwear) where legacy players have historically had dominant positions (see Figures 1 and 2).

Some leaders show consistent strength across genders. HEYDUDE, for example, is still the hottest casual footwear brand for both men and women, while Nike is a top-two athletic footwear brand across genders. In dress footwear, Steve Madden is No. 1 and No. 2 for men's and women's, respectively, and is also the only brand to appear in both lists. In general, women appear to be more excited by emerging brands, with On Running, HOKA, VEJA, Schutz and others performing more strongly among women than men.

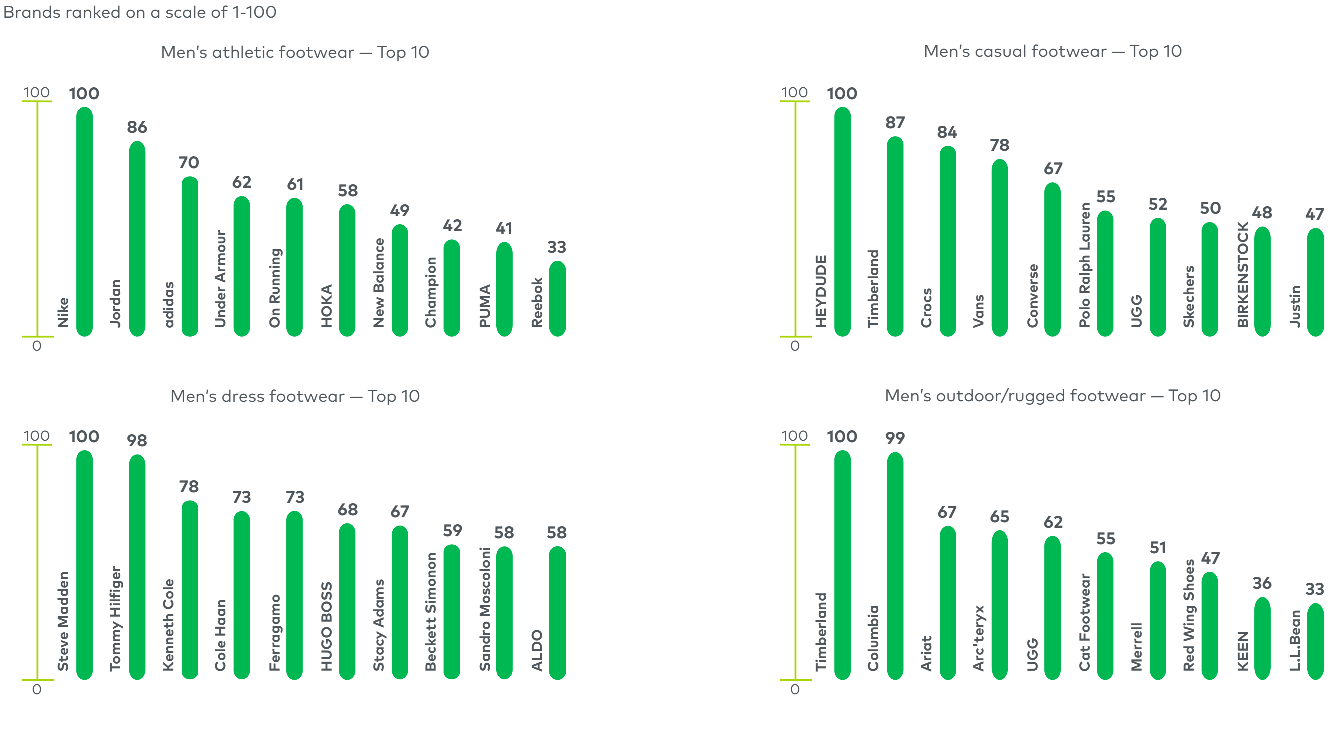
Figure 1
Women's footwear

Brands ranked on a scale of 1-100



Source: L.E.K. 2024 U.S. Footwear and Apparel Brand Heat Index

Figure 2
Men's footwear



Source: L.E.K. 2024 U.S. Footwear and Apparel Brand Heat Index

Athletic footwear

In athletic footwear, a similar cohort of brands rises to the top for both men and women. Out of the 10 most popular brands for each gender, eight are the same. However, these brands do not have the same appeal across genders, as their rankings differ considerably. For example, On Running is the top brand for women but only fifth for men. The most notable changes in the athletic footwear market have been driven by Generation Z — On Running and HOKA are lauded by this generation for their comfort, while New Balance's success is driven by its on-trend style.

In women's athletic footwear, we see a story similar to last year, with On Running, Nike and HOKA again taking the top three spots. The competition between On Running and Nike has been fierce, as they have traded top spots across generations. This year, On Running leads in Gen Z and Gen X, with both rankings driven by comfort, while Nike leads with millennials due to its brand reputation and style. On Running, Nike and HOKA have now created a material gap between themselves and the remainder of the competition. Jordan and adidas, on the other hand, have maintained their positions at No. 4 and No. 5, respectively, but have seen declining heat scores overall.

The men's athletic footwear rankings also show a story similar to last year, but this consumer is a bit slower to adopt emerging brands. Instead, Nike, Jordan, adidas and Under Armour again take the top four spots (in that order). NOBULL fell out of the top 10 overall, though it still remains popular among Gen X, while Reebok's comeback with younger generations brought it into the top 10 this year (see Figures 3 and 4).

Figure 3
Women's athletic footwear — Top 10, by generation

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	On Running	100	On Running	100	Nike	100	On Running	100
2	Nike	91	Nike	96	On Running	93	HOKA	89
3	HOKA	89	HOKA	95	HOKA	80	Nike	69
4	Jordan	65	Jordan	82	Jordan	70	NOBULL	56
5	adidas	60	New Balance	68	adidas	67	adidas	49
6	Under Armour	51	adidas	63	Under Armour	57	Under Armour	48
7	New Balance	49	Tretorn	51	New Balance	49	Jordan	43
8	NOBULL	45	Under Armour	50	NOBULL	43	New Balance	38
9	Brooks	39	Brooks	47	PUMA	42	Brooks	37
10	Reebok	35	Reebok	43	Brooks	40	Reebok	30

Source: L.E.K. survey and analysis

Figure 4
Men's athletic footwear — Top 10, by generation

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Nike	100	Nike	100	Nike	100	Nike	100
2	Jordan	86	Jordan	91	Jordan	87	HOKA	94
3	adidas	70	adidas	66	adidas	72	On Running	86
4	Under Armour	62	New Balance	51	Under Armour	65	Jordan	78
5	On Running	61	Under Armour	49	On Running	58	Under Armour	77
6	HOKA	58	HOKA	47	PUMA	49	adidas	75
7	New Balance	49	On Running		Champion	48	New Balance	61
8	Champion	42	Champion	45	New Balance	45	PUMA	43
9	PUMA	41	PUMA	37	HOKA	42	Champion	39
10	Reebok	33	Reebok	33	Reebok	36	NOBULL	37

Source: L.E.K. survey and analysis

Casual footwear

In casual footwear, brands with distinctive and identifiable silhouettes are the hottest. HEYDUDE leads in popularity for both men and women, while six other brands also appear in the top 10 lists for both genders. Notably, Allbirds fell out of the top 10 for both men and women.

HEYDUDE once again takes the top spot in women's casual footwear, followed by its owner, Crocs. HEYDUDE is No. 1 among both millennials and Gen X and No. 3 among Gen Z. Crocs earns its highest scores among Gen Z and millennials and has improved its score with Gen X. UGG has climbed in the rankings to No. 3 overall due to its blend of comfort and style, particularly among Gen Z, where it takes the No. 1 spot. Vans and Dr. Martens have fallen down the list compared to last year (from No. 3 and No. 6, respectively), suggesting some cooling off. VEJA, meanwhile, continues its rise, to No. 9; while it performs most strongly with Gen X, it has shown the greatest gains with Gen Z, which cites its style as being particularly relevant.

HEYDUDE also remains in first place overall in men's casual footwear and still holds the No. 1 spot with Gen X. Crocs' overall brand heat score saw further growth versus last year, with increases among Gen Z (where it took No. 1) and millennials; Crocs remains in the No. 3 position overall. Timberland moved into second place overall (from fourth last year), replacing Vans and taking first place among millennials. Despite Vans' improved brand heat score versus last year, its slippage in the rankings was driven by the strength of the category leaders. Meanwhile, BIRKENSTOCK is new to the men's list and takes the No. 9 spot due to strength with Gen Z and millennials, who recognize the brand for its quality. While Skechers is only No. 8 overall, it vastly overperforms within Gen X, who appreciates it for its comfort and durability (see Figures 5 and 6).

Figure 5

Women's casual footwear — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>HEYDUDE</td><td>100</td><td>UGG</td><td>100</td><td>HEYDUDE</td><td>100</td><td>HEYDUDE</td><td>100</td></tr>
<tr><td>2</td><td>Crocs</td><td>76</td><td>Crocs</td><td>96</td><td>Crocs</td><td>82</td><td>Skechers</td><td>61</td></tr>
<tr><td>3</td><td>UGG</td><td>74</td><td>HEYDUDE</td><td>81</td><td>Vans</td><td>70</td><td>OluKai</td><td>60</td></tr>
<tr><td>4</td><td>Vans</td><td>57</td><td>Converse</td><td>77</td><td>UGG</td><td>68</td><td>UGG</td><td>57</td></tr>
<tr><td>5</td><td>Converse</td><td>55</td><td>Dr. Martens</td><td>71</td><td>Converse</td><td>65</td><td>OOFOS</td><td>54</td></tr>
<tr><td>6</td><td>OluKai</td><td>48</td><td>Vans</td><td>62</td><td>BIRKENSTOCK</td><td>57</td><td>VEJA</td><td>49</td></tr>
<tr><td>7</td><td>BIRKENSTOCK</td><td>44</td><td rowspan="2">VEJA
BIRKENSTOCK</td><td rowspan="2">58</td><td>Dr. Martens</td><td>53</td><td>Crocs</td><td>48</td></tr>
<tr><td>8</td><td>Dr. Martens</td><td>43</td><td>Timberland</td><td>51</td><td>Kizik</td><td>47</td></tr>
<tr><td>9</td><td>VEJA</td><td>41</td><td>Calvin Klein</td><td>48</td><td>Blowfish</td><td>44</td><td>Rothy's</td><td>40</td></tr>
<tr><td>10</td><td>Timberland</td><td>39</td><td>Timberland</td><td>46</td><td>Skechers</td><td>43</td><td>Vans</td><td>39</td></tr>
</table>

Source: L.E.K. survey and analysis

Figure 6

Men's casual footwear — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>HEYDUDE</td><td>100</td><td>Crocs</td><td>100</td><td>Timberland</td><td>100</td><td>HEYDUDE</td><td>100</td></tr>
<tr><td>2</td><td>Timberland</td><td>87</td><td>HEYDUDE</td><td>87</td><td>Crocs</td><td>95</td><td>Skechers</td><td>76</td></tr>
<tr><td>3</td><td>Crocs</td><td>84</td><td>Vans</td><td>74</td><td>HEYDUDE</td><td>88</td><td>Timberland</td><td>66</td></tr>
<tr><td>4</td><td>Vans</td><td>78</td><td>Timberland</td><td>69</td><td>Vans</td><td>82</td><td>Vans</td><td>61</td></tr>
<tr><td>5</td><td>Converse</td><td>67</td><td>UGG</td><td>67</td><td rowspan="2">Polo Ralph Lauren
Converse</td><td rowspan="2">80</td><td>Vionic</td><td>54</td></tr>
<tr><td>6</td><td>Polo Ralph Lauren</td><td>55</td><td>Converse</td><td>61</td><td>Converse</td><td>53</td></tr>
<tr><td>7</td><td>UGG</td><td>52</td><td>BIRKENSTOCK</td><td>59</td><td>BIRKENSTOCK</td><td>67</td><td>OluKai</td><td>50</td></tr>
<tr><td>8</td><td>Skechers</td><td>50</td><td>Vionic</td><td>57</td><td rowspan="2">Tommy Hilfiger
Lacoste</td><td rowspan="2">66</td><td rowspan="2">Allbirds
Justin</td><td rowspan="2">43</td></tr>
<tr><td>9</td><td>BIRKENSTOCK</td><td>48</td><td>Polo Ralph Lauren</td><td>54</td></tr>
<tr><td>10</td><td>Justin</td><td>47</td><td>Justin</td><td>52</td><td>Skechers</td><td>65</td><td>Vince</td><td>41</td></tr>
</table>

Source: L.E.K. survey and analysis

Outdoor/rugged footwear

In 2024, the outdoor category was expanded to outdoor/rugged to reflect the lifestyle and outdoor use cases of more durable, workwear-type footwear. The range of performance across top 10 brands in outdoor/rugged footwear is quite large, suggesting lower excitement on the part of the consumer beyond the leading players. Viewed through the lens of gender, UGG, Columbia and Arc'teryx appear in the top five brands for both men and women, while the others vary. Ariat makes its debut on both lists, at No. 3 in men's and No. 7 in women's, due to its reputation as quality western wear and its recent expansion into work footwear.

UGG takes the top spot for women overall by a wide margin (27 points), particularly dominating among Gen Z (where it nearly doubles the score of second-place Arc'teryx), though Columbia slightly outpaces it among millennials. Versatile footwear/sandals are in, with Chaco and Teva near the top of the overall list and KEEN tied for third among Gen X. Rain boots are less popular, especially with Gen Z, as Hunter Boots fell down the list and Muck Boots fell off the list entirely.

Men's outdoor footwear is dominated by work brands, with Timberland leading the way and Ariat, Cat and Red Wing all showing up in the top 10. While Timberland and Columbia show strength across generations (always staying in the top three), UGG is differentially popular among Gen Z, while Merrell and L.L.Bean are differentially popular among Gen X (see Figures 7 and 8).

Figure 7
Women's outdoor/rugged footwear — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>UGG</td><td>100</td><td>UGG</td><td>100</td><td>Columbia</td><td>100</td><td>UGG</td><td>100</td></tr>
<tr><td>2</td><td>Columbia</td><td>73</td><td>Arc'teryx</td><td>56</td><td>UGG</td><td>97</td><td>Columbia</td><td>80</td></tr>
<tr><td>3</td><td>Arc'teryx</td><td rowspan="2">55</td><td>Teva</td><td>54</td><td>Chaco</td><td>86</td><td>KEEN</td><td rowspan="2">69</td></tr>
<tr><td>4</td><td>Chaco</td><td>Columbia</td><td>46</td><td>Hunter Boots</td><td>73</td><td>Ariat</td></tr>
<tr><td>5</td><td>Teva</td><td>43</td><td>Chaco</td><td>38</td><td>Arc'teryx</td><td rowspan="2">72</td><td>Muck Boots</td><td>63</td></tr>
<tr><td>6</td><td>SOREL</td><td>42</td><td>Danner</td><td>36</td><td>SOREL</td><td>Black Diamond</td><td>53</td></tr>
<tr><td>7</td><td>Ariat</td><td>39</td><td>REEF</td><td>35</td><td>BEARPAW</td><td>53</td><td>Teva</td><td>52</td></tr>
<tr><td>8</td><td>Hunter Boots</td><td>38</td><td>L.L.Bean</td><td>31</td><td>Salomon</td><td>51</td><td>Merrell</td><td>51</td></tr>
<tr><td>9</td><td>L.L.Bean</td><td>33</td><td>Merrell</td><td>30</td><td>Teva</td><td>47</td><td>Hunter Boots</td><td>50</td></tr>
<tr><td>10</td><td>BEARPAW</td><td>32</td><td>Ariat</td><td>28</td><td>Helly Hansen</td><td>45</td><td>Cat Footwear</td><td>49</td></tr>
</table>

Source: L.E.K. survey and analysis

Figure 8
Men's outdoor/rugged footwear — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>Timberland</td><td>100</td><td>UGG</td><td>100</td><td>Columbia</td><td>100</td><td>Timberland</td><td>100</td></tr>
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<tr><td>3</td><td>Ariat</td><td>67</td><td>Columbia</td><td>93</td><td>Arc'teryx</td><td>85</td><td>Merrell</td><td>77</td></tr>
<tr><td>4</td><td>Arc'teryx</td><td>65</td><td>Red Wing Shoes</td><td>69</td><td>Ariat</td><td>82</td><td>Cat Footwear</td><td>72</td></tr>
<tr><td>5</td><td>UGG</td><td>62</td><td>Arc'teryx</td><td>67</td><td>Red Wing Shoes</td><td>54</td><td>KEEN</td><td rowspan="2">64</td></tr>
<tr><td>6</td><td>Cat Footwear</td><td>55</td><td>Cat Footwear</td><td>57</td><td>UGG</td><td>52</td><td>Ariat</td></tr>
<tr><td>7</td><td>Merrell</td><td>51</td><td>Ariat</td><td>56</td><td>Cat Footwear</td><td>50</td><td>L.L.Bean</td><td>55</td></tr>
<tr><td>8</td><td>Red Wing Shoes</td><td>47</td><td>KEEN</td><td>49</td><td>Black Diamond</td><td>42</td><td>SOREL</td><td>52</td></tr>
<tr><td>9</td><td>KEEN</td><td>36</td><td>L.L.Bean</td><td>45</td><td>Danner</td><td>41</td><td>Salomon</td><td rowspan="2">51</td></tr>
<tr><td>10</td><td>L.L.Bean</td><td>33</td><td>Merrell</td><td>44</td><td>Merrell</td><td>38</td><td>Black Diamond</td></tr>
</table>

Source: L.E.K. survey and analysis

Dress footwear

In dress footwear, the top 10 brands are quite varied across genders. Steve Madden is No. 1 and No. 2 on both lists, but no other brands repeat.

While the leaders in women's dress footwear are fairly consistent with prior years, the competition is hot, with the top five brands separated by just 15 points. Michael Kors, Steve Madden and Coach again take the top three spots, followed by established brands Calvin Klein and kate spade; style and brand appeal are king in this category, so the top players make sense. Upstart brands Schutz and Kurt Geiger make the top 10 list for the first time this year, scoring particularly well with millennials, while Vince Camuto performs strongly with Gen X — coming in at No. 2 — but doesn't make the top 10 in any other generation.

In men's, the largest change has been the drop of industry leader Cole Haan to No. 4 from No. 1 overall, driven by decidedly poor performance with Gen Z. Meanwhile, Steve Madden and Tommy Hilfiger take over the top two spots (up from No. 7 and No. 11, respectively) due to their respective brand reputations and evolving, diverse styles.

However, it's fair to say the dress footwear category as a whole isn't overly popular with Gen Z men, as evidenced by its material awareness of only 10 brands; this is likely a result of the casualization trend, which predominates among younger generations and was amplified by the shift to work-from-home.

Figure 9
Women's dress footwear — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>Michael Kors</td><td>100</td><td>Steve Madden</td><td>100</td><td>Michael Kors</td><td>100</td><td>Michael Kors</td><td>100</td></tr>
<tr><td>2</td><td>Steve Madden</td><td>97</td><td>Coach</td><td>86</td><td>Steve Madden</td><td>96</td><td>Vince Camuto</td><td>73</td></tr>
<tr><td>3</td><td>Coach</td><td>94</td><td>kate spade</td><td>81</td><td>Coach</td><td>95</td><td>Coach</td><td>72</td></tr>
<tr><td>4</td><td>Calvin Klein</td><td>85</td><td>Michael Kors</td><td>76</td><td>Calvin Klein</td><td>88</td><td>Calvin Klein</td><td>71</td></tr>
<tr><td>5</td><td>kate spade</td><td>84</td><td>Calvin Klein</td><td>70</td><td>kate spade</td><td>84</td><td>Cole Haan</td><td>67</td></tr>
<tr><td>6</td><td>GUESS</td><td rowspan="2">58</td><td>Jeffrey Campbell</td><td>64</td><td>GUESS</td><td>66</td><td>Steve Madden</td><td rowspan="2">62</td></tr>
<tr><td>7</td><td>Schutz</td><td>Franco Sarto</td><td>58</td><td>Schutz</td><td>59</td><td>Sam Edelman</td></tr>
<tr><td>8</td><td>Kurt Geiger</td><td>55</td><td>Sam Edelman</td><td>56</td><td>Kurt Geiger</td><td>57</td><td>kate spade</td><td>59</td></tr>
<tr><td>9</td><td>Jeffrey Campbell</td><td rowspan="2">52</td><td>Kurt Geiger</td><td>51</td><td>Seychelles</td><td>55</td><td>Nine West</td><td>54</td></tr>
<tr><td>10</td><td>Vince Camuto</td><td>Dolce Vita</td><td>49</td><td>Marc Fisher</td><td>51</td><td>Kenneth Cole</td><td>52</td></tr>
</table>

Source: L.E.K. survey and analysis

Figure 10
Men's dress footwear — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>Steve Madden</td><td>100</td><td>Tommy Hilfiger</td><td>100</td><td>Steve Madden</td><td>100</td><td>Steve Madden</td><td>100</td></tr>
<tr><td>2</td><td>Tommy Hilfiger</td><td>98</td><td>Steve Madden</td><td>61</td><td>Cole Haan</td><td>95</td><td>Kenneth Cole</td><td>91</td></tr>
<tr><td>3</td><td>Kenneth Cole</td><td>78</td><td>Kenneth Cole</td><td>58</td><td>Tommy Hilfiger</td><td>89</td><td>Bruno Magli</td><td>88</td></tr>
<tr><td>4</td><td>Cole Haan</td><td rowspan="2">73</td><td>Ferragamo</td><td>57</td><td>Ferragamo</td><td>75</td><td>Cole Haan</td><td>76</td></tr>
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<tr><td>8</td><td>Sandro Moscoloni</td><td>59</td><td>Alden</td><td>38</td><td>Sandro Moscoloni</td><td>63</td><td>Joseph Abboud</td><td>67</td></tr>
<tr><td>9</td><td>Beckett Simonon</td><td rowspan="2">58</td><td>Johnston & Murphy</td><td>16</td><td>Beckett Simonon</td><td>58</td><td>Stacy Adams</td><td>64</td></tr>
<tr><td>10</td><td>ALDO</td><td>Cole Haan</td><td>0</td><td>Unlisted</td><td>57</td><td>Unlisted</td><td>62</td></tr>
</table>

Source: L.E.K. survey and analysis

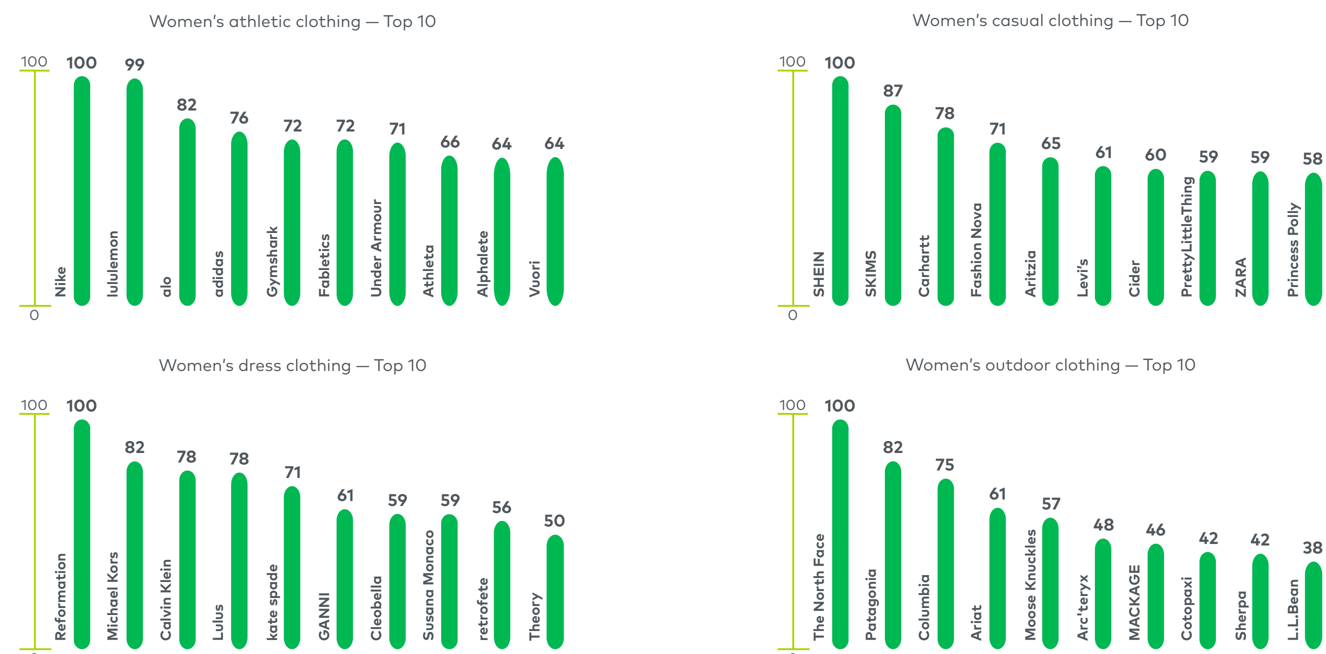
Apparel

There are several key trends in apparel this year. The usual suspects in fast fashion (e.g., SHEIN, Fashion Nova) still dominate in casual clothing, though several other fast fashion players have risen through the ranks (e.g., UNIQLO, Princess Polly, Cider). Workwear brands (e.g., Carhartt, Levi's, Duluth Trading Co.) have sustained popularity in casual clothing, while the outdoor category has seen an increasing number of specialized technical apparel brands in the top 10 (e.g., Ariat, Huk, Salt Life, Pelagic).

As in footwear, a handful of apparel brands demonstrate consistently strong performance across genders and generations. Nike is the top athletic apparel brand for both men and women, while The North Face, Columbia and Patagonia make up the top three in both women's and men's outdoor apparel. Casual and dress apparel show more brand variation across genders, but SHEIN, Carhartt, Michael Kors and Calvin Klein exhibit broad appeal (see Figures 11 and 12).

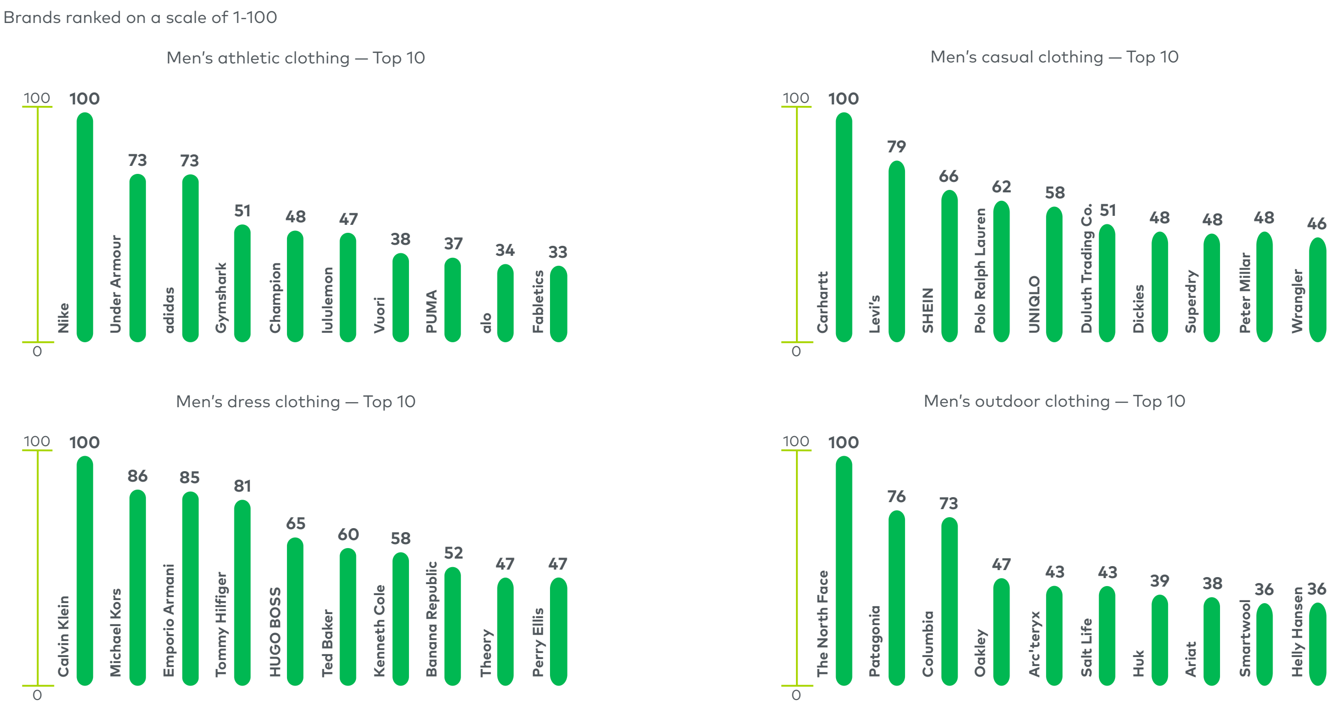
Figure 11
Women's clothing

Brands ranked on a scale of 1-100



Source: L.E.K. 2024 U.S. Footwear and Apparel Brand Heat Index

Figure 12
Men's clothing



Source: L.E.K. 2024 U.S. Footwear and Apparel Brand Heat Index

Athletic clothing

There is meaningful overlap in the leading brands across genders in athletic clothing. Nike comes in as the top brand in both men's and women's athletic clothing while eight of the top 10 brands overlap in both lists.

In women's athletic clothing, lululemon continues to inch closer to Nike atop the list, with both brands benefiting from their strong brand reputation and on-trend style. Newer brand alo moved ahead of adidas this year into the No. 3 spot, with Gymshark and Fabletics in close pursuit — all of them driven by strong reputations and savvy marketing (e.g., social media, influencer promotions), leading to high scores among Gen Z. Athleta is back in the top 10 after narrowly missing inclusion last year, driven by its strength with Gen X (where it is No. 2), which appreciates its aesthetic and comfort.

In men's athletic clothing, legacy brands Nike, adidas and Under Armour are hotter than in women's athletic clothing, making up the top three brands; there is a significant drop-off after these three, indicating relatively lower competition/true dominance in the category. lululemon has jumped up a spot to No. 6 and continues to make strides with Gen Z in particular. Vuori and alo are the big gainers this year, rising to No. 7 and No. 9, respectively, with both brands performing more strongly among millennials and Gen X, primarily due to comfort and brand reputation. As with athletic footwear, PUMA and Champion make the top 10 for men's but not women's athletic clothing (see Figures 13 and 14).

Figure 13

Women's athletic clothing — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>Nike</td><td>100</td><td>lululemon</td><td>100</td><td>Nike</td><td>100</td><td>lululemon</td><td>100</td></tr>
<tr><td>2</td><td>lululemon</td><td>99</td><td>Nike</td><td>94</td><td>lululemon</td><td>86</td><td>Athleta</td><td>94</td></tr>
<tr><td>3</td><td>alo</td><td>82</td><td>alo</td><td>82</td><td>adidas</td><td>84</td><td rowspan="2">Under Armour
Vuori</td><td rowspan="2">89</td></tr>
<tr><td>4</td><td>adidas</td><td>76</td><td>Gymshark</td><td>77</td><td>Under Armour</td><td>75</td></tr>
<tr><td>5</td><td rowspan="2">Gymshark
Fabletics</td><td rowspan="2">72</td><td>Alphalete</td><td>75</td><td rowspan="2">Fabletics
Champion</td><td rowspan="2">71</td><td>alo</td><td>88</td></tr>
<tr><td>6</td><td>Fabletics</td><td>69</td><td>Nike</td><td>86</td></tr>
<tr><td>7</td><td>Under Armour</td><td>71</td><td>adidas</td><td>65</td><td>alo</td><td>65</td><td>Fabletics</td><td>72</td></tr>
<tr><td>8</td><td>Athleta</td><td>66</td><td>Champion</td><td>54</td><td>Vuori</td><td>64</td><td>adidas</td><td>68</td></tr>
<tr><td>9</td><td rowspan="2">Alphalete
Vuori</td><td rowspan="2">64</td><td>Athleta</td><td>51</td><td>Gymshark</td><td>62</td><td>32 Degrees</td><td>67</td></tr>
<tr><td>10</td><td>Under Armour</td><td>49</td><td>Athleta</td><td>60</td><td>Reebok</td><td>54</td></tr>
</table>

Source: L.E.K. survey and analysis

Figure 14

Men's athletic clothing — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>Nike</td><td>100</td><td>Nike</td><td>100</td><td>Nike</td><td>100</td><td rowspan="2">Nike
Under Armour</td><td rowspan="2">100</td></tr>
<tr><td>2</td><td rowspan="2">Under Armour
adidas</td><td rowspan="2">73</td><td>Gymshark</td><td>76</td><td>Under Armour</td><td>74</td></tr>
<tr><td>3</td><td>adidas</td><td>74</td><td>adidas</td><td>68</td><td>adidas</td><td>82</td></tr>
<tr><td>4</td><td>Gymshark</td><td>51</td><td>Champion</td><td>58</td><td>Champion</td><td>47</td><td>alo</td><td>47</td></tr>
<tr><td>5</td><td>Champion</td><td>48</td><td>lululemon</td><td>57</td><td>lululemon</td><td>43</td><td>lululemon</td><td>45</td></tr>
<tr><td>6</td><td>lululemon</td><td>47</td><td>Under Armour</td><td>55</td><td>Vuori</td><td>39</td><td>Vuori</td><td>44</td></tr>
<tr><td>7</td><td>Vuori</td><td>38</td><td>Fabletics</td><td>42</td><td>PUMA</td><td>36</td><td rowspan="2">Hurley
32 Degrees</td><td rowspan="2">43</td></tr>
<tr><td>8</td><td>PUMA</td><td>37</td><td>PUMA</td><td>40</td><td>Reebok</td><td>33</td></tr>
<tr><td>9</td><td>alo</td><td>34</td><td>Vuori</td><td>39</td><td>alo</td><td>31</td><td>PUMA</td><td>42</td></tr>
<tr><td>10</td><td>Fabletics</td><td>33</td><td>alo</td><td>37</td><td>Fabletics</td><td>30</td><td>Champion</td><td>41</td></tr>
</table>

Source: L.E.K. survey and analysis

Casual clothing

Women's casual clothing continues to have a strong fast fashion element to it, with SHEIN again taking the top spot overall, though its position is notably weaker than it was last year. Former shapewear brand SKIMS continued its ascent, coming in at No. 2 overall and No. 1 for Gen Z, while SPANX fell out of the top 10 except for Gen X. Fashion Nova, PrettyLittleThing and ZARA remain in the top 10. Newer fast fashion brands Princess Polly and Cider join the list, largely off of their strength in Gen Z (though they have yet to really register with Gen X); their rise speaks to the ability to drive growth via TikTok and other social media platforms, particularly with younger audiences. More traditional brands like Old Navy and Levi's perform the strongest among Gen X.

Men's casual clothing was once again dominated by "work" players this year with Carhartt, Levi's, Duluth Trading Co., Dickies and Wrangler all showing up in the top 10. Fast fashion brand SHEIN has lost substantial traction relative to last year (when it had a score of 94), with consumers directly commenting on pending lawsuits and poor quality impacting its reputation. Meanwhile, other fast fashion brands are rising through the ranks to compete with SHEIN, particularly among Gen Z — UNIQLO made a leap from outside the top 10 to No. 2 for Gen Z, with Topman and Mango also performing strongly. Older generations are drawn to preppier labels, with Peter Millar debuting in the top 10 off of its strength in Gen X (see Figures 15 and 16).

Figure 15
Women's casual clothing — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>SHEIN</td><td>100</td><td>SKIMS</td><td>100</td><td>SHEIN</td><td>100</td><td>SHEIN</td><td>100</td></tr>
<tr><td>2</td><td>SKIMS</td><td>87</td><td>SHEIN</td><td>94</td><td rowspan="2">SKIMS
Carhartt</td><td rowspan="2">81</td><td>Fashion Nova</td><td>79</td></tr>
<tr><td>3</td><td>Carhartt</td><td>78</td><td>Carhartt</td><td>78</td><td>Carhartt</td><td>78</td></tr>
<tr><td>4</td><td>Fashion Nova</td><td>71</td><td>Aritzia</td><td>69</td><td>Good American</td><td>69</td><td>Levi's</td><td>75</td></tr>
<tr><td>5</td><td>Aritzia</td><td>65</td><td>Fashion Nova</td><td>67</td><td>Fashion Nova</td><td>65</td><td>Old Navy</td><td>64</td></tr>
<tr><td>6</td><td>Levi's</td><td>61</td><td rowspan="2">Cider
PrettyLittleThing</td><td rowspan="2">62</td><td>ZARA</td><td>63</td><td>Duluth Trading Co.</td><td>63</td></tr>
<tr><td>7</td><td>Cider</td><td>60</td><td>Princess Polly</td><td>61</td><td>Good American</td><td>62</td></tr>
<tr><td>8</td><td rowspan="2">PrettyLittleThing
ZARA</td><td rowspan="2">59</td><td rowspan="2">ZARA
Princess Polly</td><td rowspan="2">61</td><td rowspan="3">Old Navy
Levi's
H&M</td><td rowspan="3">56</td><td>SPANX</td><td>59</td></tr>
<tr><td>9</td><td>Free People</td><td>58</td></tr>
<tr><td>10</td><td>Princess Polly</td><td>58</td><td>Levi's</td><td>60</td><td>SKIMS</td><td>52</td></tr>
</table>

Source: L.E.K. survey and analysis

Figure 16
Men's casual clothing — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>Carhartt</td><td>100</td><td>Carhartt</td><td>100</td><td>Carhartt</td><td>100</td><td>Carhartt</td><td>100</td></tr>
<tr><td>2</td><td>Levi's</td><td>79</td><td>UNIQLO</td><td>95</td><td>Levi's</td><td>82</td><td>Levi's</td><td>80</td></tr>
<tr><td>3</td><td>SHEIN</td><td>66</td><td>Levi's</td><td>79</td><td>Supreme</td><td>71</td><td>Peter Millar</td><td rowspan="2">78</td></tr>
<tr><td>4</td><td>Polo Ralph Lauren</td><td>62</td><td>SHEIN</td><td>76</td><td>Polo Ralph Lauren</td><td>70</td><td>Taylor Stitch</td></tr>
<tr><td>5</td><td>UNIQLO</td><td>58</td><td>Polo Ralph Lauren</td><td>67</td><td>Vince</td><td>68</td><td>SHEIN</td><td>60</td></tr>
<tr><td>6</td><td>Duluth Trading Co.</td><td>51</td><td>Topman</td><td>65</td><td>SHEIN</td><td>65</td><td>Polo Ralph Lauren</td><td>57</td></tr>
<tr><td>7</td><td>Dickies</td><td rowspan="3">48</td><td>Duluth Trading Co.</td><td>60</td><td>Superdry</td><td>63</td><td>Duluth Trading Co.</td><td>53</td></tr>
<tr><td>8</td><td>Superdry</td><td>Tommy Hilfiger</td><td>59</td><td>Dickies</td><td>58</td><td>Old Navy</td><td rowspan="2">49</td></tr>
<tr><td>9</td><td>Peter Millar</td><td>Mango</td><td>58</td><td>ZARA</td><td>57</td><td>Dickies</td></tr>
<tr><td>10</td><td>Wrangler</td><td>46</td><td>Kith</td><td>57</td><td>Duluth Trading Co.</td><td>55</td><td>Wrangler</td><td>48</td></tr>
</table>

Source: L.E.K. survey and analysis

Outdoor clothing

For both men's and women's outdoor apparel, stalwart brands The North Face, Columbia and Patagonia again top the list in varying permutations regardless of cohort, suggesting outdoor needs may be more consistent across genders and generations.

Among women, that group of three (The North Face, Columbia and Patagonia) tops the list across every generation; The North Face is No. 1 in each generation, while Patagonia lags with Gen Z relative to other generations. Moose Knuckles and MACKAGE show greater strength since last year, coming in at No. 5 and No. 7, respectively, as they capitalize on a trend toward investing in stylish premium outerwear. Ariat, a newcomer to the list at No. 4, performs well across generations, while accessible, versatile outdoor brands like L.L.Bean and Smartwool perform more strongly among Gen X.

For men, The North Face, Columbia and Patagonia are again at the top nearly across the board. Gen Z is the one exception, where Arc'teryx comes in at No. 2 due to its superb reputation and comfort. Oakley rose to No. 4 from No. 7 last year, largely off of improvements with older generations. Salt Life and Huk make the top 10 due to their strong reputations as fishing brands, in particular with Gen X, though notably these sport-specific brands do not register with women to the same extent. While not making the men's top 10 overall, L.L.Bean performs well with older generations.

Figure 17
Women's outdoor clothing — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>The North Face</td><td>100</td><td>The North Face</td><td>100</td><td>The North Face</td><td>100</td><td>The North Face</td><td>100</td></tr>
<tr><td>2</td><td>Patagonia</td><td>82</td><td>Columbia</td><td>79</td><td>Patagonia</td><td>82</td><td>Patagonia</td><td>87</td></tr>
<tr><td>3</td><td>Columbia</td><td>75</td><td>Patagonia</td><td>78</td><td>Columbia</td><td>78</td><td>Columbia</td><td>67</td></tr>
<tr><td>4</td><td>Ariat</td><td>61</td><td>Moose Knuckles</td><td>75</td><td rowspan="2">Ariat
Arc'teryx</td><td rowspan="2">52</td><td>Ariat</td><td>66</td></tr>
<tr><td>5</td><td>Moose Knuckles</td><td>57</td><td>Ariat</td><td>74</td><td>Smartwool</td><td>59</td></tr>
<tr><td>6</td><td>Arc'teryx</td><td>48</td><td>MACKAGE</td><td>60</td><td>Fjällräven</td><td>48</td><td>Moose Knuckles</td><td>54</td></tr>
<tr><td>7</td><td>MACKAGE</td><td>46</td><td>icebreaker</td><td>59</td><td rowspan="2">Marmot
Salomon</td><td rowspan="2">45</td><td>Sherpa</td><td>52</td></tr>
<tr><td>8</td><td rowspan="2">Cotopaxi
Sherpa</td><td rowspan="2">42</td><td rowspan="2">Arc'teryx
Cotopaxi</td><td rowspan="2">51</td><td>Cotopaxi</td><td>50</td></tr>
<tr><td>9</td><td>Osprey</td><td>42</td><td>L.L.Bean</td><td>46</td></tr>
<tr><td>10</td><td>L.L.Bean</td><td>38</td><td>Kari Traa</td><td>50</td><td>Sherpa</td><td>41</td><td>Arc'teryx</td><td>40</td></tr>
</table>

Source: L.E.K. survey and analysis

Figure 18
Men's outdoor clothing — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>The North Face</td><td>100</td><td>The North Face</td><td>100</td><td>The North Face</td><td>100</td><td>The North Face</td><td>100</td></tr>
<tr><td>2</td><td>Patagonia</td><td>76</td><td>Arc'teryx</td><td>80</td><td>Patagonia</td><td>78</td><td>Patagonia</td><td>89</td></tr>
<tr><td>3</td><td>Columbia</td><td>73</td><td>Columbia</td><td>72</td><td>Columbia</td><td>74</td><td>Columbia</td><td>83</td></tr>
<tr><td>4</td><td>Oakley</td><td>47</td><td rowspan="2">Ariat
Patagonia</td><td rowspan="2">68</td><td>Arc'teryx</td><td>59</td><td>Huk</td><td>69</td></tr>
<tr><td>5</td><td rowspan="2">Arc'teryx
Salt Life</td><td rowspan="2">43</td><td>Oakley</td><td>52</td><td>Salt Life</td><td>64</td></tr>
<tr><td>6</td><td>Oakley</td><td>59</td><td>Salt Life</td><td>50</td><td>PELAGIC</td><td>61</td></tr>
<tr><td>7</td><td>Huk</td><td>39</td><td>Helly Hansen</td><td>48</td><td>L.L.Bean</td><td>42</td><td>Oakley</td><td>53</td></tr>
<tr><td>8</td><td>Ariat</td><td>38</td><td>Fjällräven</td><td>47</td><td>Huk</td><td>40</td><td>Helly Hansen</td><td>52</td></tr>
<tr><td>9</td><td rowspan="2">Smartwool
Helly Hansen</td><td rowspan="2">36</td><td>Burton</td><td>43</td><td rowspan="2">Smartwool
Ariat</td><td rowspan="2">39</td><td rowspan="2">Cotopaxi
L.L.Bean</td><td rowspan="2">49</td></tr>
<tr><td>10</td><td>KÜHL</td><td>42</td></tr>
</table>

Source: L.E.K. survey and analysis

Dress clothing

Calvin Klein and Michael Kors are among the leaders in both men's and women's dress clothing, while the remaining brands differ significantly across genders. Notably, there is relatively low engagement with dress brands, particularly among Gen Z men.

The top 10 in women's dress clothing is a mix of specialty retail brands, direct-to-consumer (DTC) brands and wholesale businesses. Reformation rose to No. 1, both overall and among Gen Z and millennials; it is viewed as both fashionable and sustainable. Meanwhile, the rest of the top five remain the same — Michael Kors, Calvin Klein, Lulus and kate spade (though kate spade fell from No. 2 to No. 5). Some of the top gainers this year include GANNI and Cleobella, largely due to their strength with millennials, while Lulus tops the list for Gen X — the rest of that generation's top 10 shows a differential willingness to invest in their dress wardrobe with premium brands like MILLY, Veronica Beard and Theory. In addition to the lower engagement across the category, Gen Z women have limited interest in many of the brands (i.e., overall sentiment even in the top 10 is fairly low).

The men's dress clothing category is again led by Calvin Klein and Michael Kors. Much like in men's dress footwear, Tommy Hilfiger has risen in popularity, with a score of 81 versus 69 last year, and has taken over the top spot with Gen Z. Classic brands HUGO BOSS, Ted Baker and Perry Ellis have all improved their brand heat scores by more than 10 points, primarily off of strong brand reputations. Ted Baker had the largest jump (up 33 points), led by Gen X, which rates it as the hottest brand in the category. Among DTC brands, Suitsupply fell out of the top 10 list overall this year but continued its ascent with Gen Z, while Bonobos only makes the list for millennials, and Indochino fell off Gen X's list. While DTC brands have certainly made a splash, their staying power requires deeper connection with the consumer to remain top-of-mind.

Figure 19
Women's dress clothing — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>Reformation</td><td>100</td><td>Reformation</td><td>100</td><td>Reformation</td><td>100</td><td>Lulus</td><td>100</td></tr>
<tr><td>2</td><td>Michael Kors</td><td>82</td><td>Calvin Klein</td><td>99</td><td>GANNI</td><td>81</td><td>Reformation</td><td>98</td></tr>
<tr><td>3</td><td>Calvin Klein</td><td rowspan="2">78</td><td>Michael Kors</td><td>89</td><td>Susana Monaco</td><td>80</td><td>Michael Kors</td><td>93</td></tr>
<tr><td>4</td><td>Lulus</td><td>kate spade</td><td>87</td><td>Maje</td><td>75</td><td>Halogen</td><td>80</td></tr>
<tr><td>5</td><td>kate spade</td><td>71</td><td>Lulus</td><td>85</td><td>Michael Kors</td><td>70</td><td>MILLY</td><td>75</td></tr>
<tr><td>6</td><td>GANNI</td><td>61</td><td>LK Bennett</td><td>61</td><td>M.M. LaFleur</td><td>69</td><td>kate spade</td><td rowspan="2">73</td></tr>
<tr><td>7</td><td>Cleobella</td><td rowspan="2">59</td><td>retrofete</td><td rowspan="2">60</td><td>Lulus</td><td>62</td><td>Vince Camuto</td></tr>
<tr><td>8</td><td>Susana Monaco</td><td>Tadashi Shoji</td><td>Calvin Klein</td><td>61</td><td>Veronica Beard</td><td>72</td></tr>
<tr><td>9</td><td>retrofete</td><td>56</td><td>HUGO BOSS</td><td>56</td><td>kate spade</td><td>59</td><td>Calvin Klein</td><td>71</td></tr>
<tr><td>10</td><td>Theory</td><td>50</td><td>Sherri Hill</td><td>55</td><td>Cleobella</td><td>58</td><td>Theory</td><td>70</td></tr>
</table>

Source: L.E.K. survey and analysis

Figure 20

Men's dress clothing — Top 10, by generation

<table>
<tr><th></th><th>Total</th><th>Score</th><th>Gen Z</th><th>Score</th><th>Millennial</th><th>Score</th><th>Gen X</th><th>Score</th></tr>
<tr><td>1</td><td>Calvin Klein</td><td>100</td><td>Tommy Hilfiger</td><td>100</td><td>Calvin Klein</td><td>100</td><td>Ted Baker</td><td>100</td></tr>
<tr><td>2</td><td>Michael Kors</td><td>86</td><td>Calvin Klein</td><td>98</td><td rowspan="2">Michael Kors
Emporio Armani</td><td rowspan="2">88</td><td>Emporio Armani</td><td>91</td></tr>
<tr><td>3</td><td>Emporio Armani</td><td>85</td><td>Michael Kors</td><td>80</td><td>Calvin Klein</td><td>80</td></tr>
<tr><td>4</td><td>Tommy Hilfiger</td><td>81</td><td>Suitsupply</td><td>71</td><td>Tommy Hilfiger</td><td>71</td><td>Kenneth Cole</td><td>79</td></tr>
<tr><td>5</td><td>HUGO BOSS</td><td>65</td><td>Emporio Armani</td><td>64</td><td>HUGO BOSS</td><td>67</td><td>HUGO BOSS</td><td>76</td></tr>
<tr><td>6</td><td>Ted Baker</td><td>60</td><td rowspan="2">Perry Ellis
Kenneth Cole</td><td rowspan="2">52</td><td>Banana Republic</td><td>62</td><td>Michael Kors</td><td>73</td></tr>
<tr><td>7</td><td>Kenneth Cole</td><td>58</td><td>Theory</td><td>61</td><td>Perry Ellis</td><td>60</td></tr>
<tr><td>8</td><td>Banana Republic</td><td>52</td><td>Brooks Brothers</td><td>49</td><td>Joseph Abboud</td><td>52</td><td>Jos. A. Bank</td><td>59</td></tr>
<tr><td>9</td><td rowspan="2">Theory
Perry Ellis</td><td rowspan="2">47</td><td>Banana Republic</td><td>46</td><td>Bonobos</td><td>49</td><td rowspan="2">Zegna
Tommy Hilfiger</td><td rowspan="2">52</td></tr>
<tr><td>10</td><td>HUGO BOSS</td><td>44</td><td>Kenneth Cole</td><td>47</td></tr>
</table>

Source: L.E.K. survey and analysis

Conclusion

Our Brand Heat Index continues to demonstrate how material differences in brand momentum can exist below the surface and how quickly sentiment can change. Once again, generational differences in top brand rankings make clear how important it is to recognize that not all consumers are the same and that a deep understanding combined with tailored strategies is required in order to win.

This depth of insight has never been more important. As you've seen, some industry leaders have been able to maintain their leadership positions year over year, while others have been overtaken by newer entrants. The notable rise of up-and-coming brands, some of which even claimed top spots in key categories/cohorts, shows that consumers' consideration sets are expanding, and they're increasingly willing to embrace new and innovative brands beyond legacy players. Accordingly, it's no time to rest.

We tested some 450 different brands across categories to understand their popularity and the key factors driving it. We invite you to connect with us to learn more about the Brand Heat Index and gain further insights into how consumers feel about your brand and why.

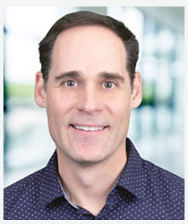
Please don't hesitate to contact us at strategy@lek.com.

Endnote

[1]Previous versions of the survey called the category "outdoor" footwear; expanded to "outdoor/rugged" footwear in 2024.

About the Authors

Chris Randall
MANAGING DIRECTOR AND PARTNER, BOSTON
Chris Randall is a Managing Director and Partner in L.E.K. Consulting's Boston office and serves as Global Co-Head of the firm's Consumer sector. Chris has extensive experience in footwear and apparel, sporting goods, home and household products, and other durable goods. He advises retailers and brands on a range of critical issues, including growth strategy, brand and marketing strategy, channel strategy, digital, data analytics, organizational strategy, and M&A.



Jon Weber
MANAGING DIRECTOR AND PARTNER, BOSTON
Jon Weber is a Managing Director and Partner in L.E.K. Consulting's Boston office. Jon serves on the firm's Global Leadership Team and recently led L.E.K.'s global Retail and Consumer Products practice. He advises clients on a range of strategic issues, including brand positioning and consumer insights, growth strategy, digital and channel strategy, pricing and promotions, customer experience and engagement, performance improvement, and M&A.

Laura Brookhiser
MANAGING DIRECTOR AND PARTNER, BOSTON
Laura Brookhiser, a Managing Director and Partner in L.E.K. Consulting's Boston office, is a member of the Retail and Consumer Products practice with a focus on the home goods, footwear and apparel sectors (having advised four of the top 10 U.S.-based footwear companies). Laura has deep experience in M&A, consumer segmentation, brand positioning, new product development, category expansion, portfolio optimization and organizational transformation.