LEK™

SPECIAL REPORT

2023 US Footwear and Apparel Brand Heat Index

Contents

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Shifts in shopper preferences: About the Brand Heat Index

With each generation comes a new set of shopping attitudes — and behaviors. But regardless of how widely those attitudes and behaviors vary, each generation plays a key role. Gen Z, for example, has significant influence over style trends, while millennials have the most purchasing power and Gen Xers have the highest average incomes.[1]

That's why, especially in today's increasingly crowded marketplace, understanding which brand and product strategies resonate with each generation is critical to figuring out how your product can cut through the noise and reach your target audience. L.E.K. Consulting's second annual Brand Heat Index helps brands and retailers identify which brands are gaining popularity (i.e., increasing their brand "heat") across major product categories in women's and men's footwear and apparel.

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 most positive growth trajectory with shoppers, not necessarily their relative size or scale.

The survey gathers feedback on brands across four product categories: athletic, casual, outdoor 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	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 consumer trends:

- Footwear consumers are increasingly demanding both style AND comfort, indicating that brands need to develop credible differentiation on both fashion and function dimensions. In the meantime, distinctive silhouettes continue to help footwear brands stand out (e.g., Crocs, HEYDUDE, UGG, Vans, BIRKENSTOCK).

- Legacy players that have been able to provide a consistent message and experience to consumers over time have maintained their strong performance (e.g., Nike, Columbia), but shoppers are showing growing excitement about up-and-coming brands like HEYDUDE, HOKA and On.

- Workwear brands are gaining popularity within men's casual clothing, consistent with the continued casualization trend that creates more wearing occasions for these products.

- While many of the top apparel brands vary depending on the gender of the consumer, some leading players are effectively able to serve both markets, particularly in the athletic and outdoor categories (e.g., lululemon, Gymshark, The North Face, Patagonia).

- Younger consumers show a preference for newness and fast fashion (e.g., SHEIN, ZARA, Lulus), while older consumers place greater emphasis on comfort and quality.

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?**

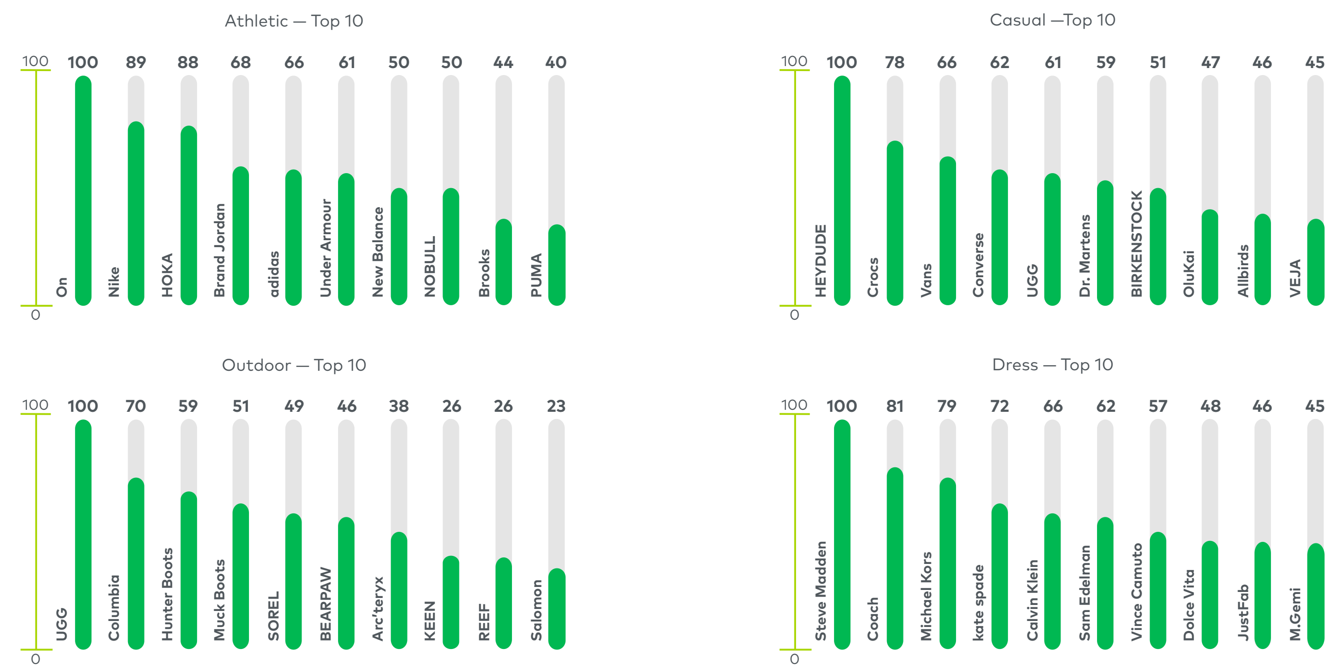
Footwear

While brand heat scores vary greatly by product type, gender and generation, some footwear brands enjoy a high level of preference among both women and men (see Figures 1 and 2). For example, HEYDUDE is the hottest casual footwear brand among both groups, while Nike and Columbia are among the top performers for both genders in athletic and outdoor footwear, respectively. The leading dress footwear brands vary more significantly across genders, with only Steve Madden showing up in the top 10 for both women and men.

Figure 1

2023 Brand Heat Index - Women's footwear

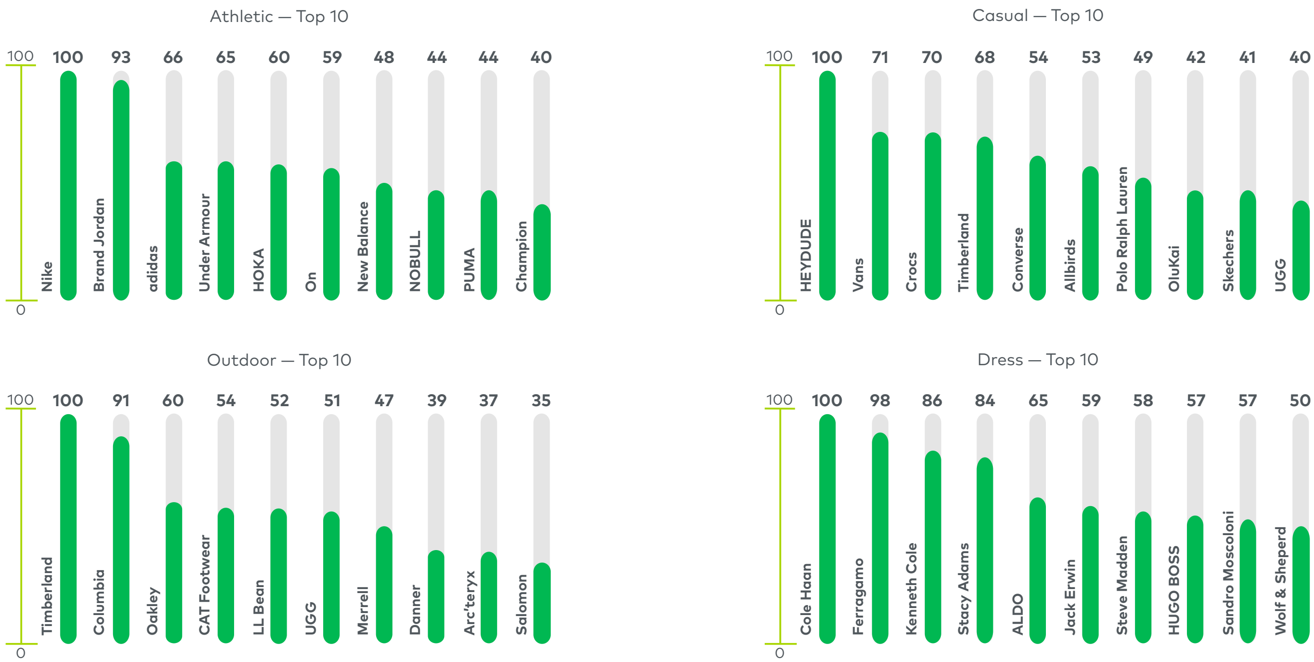
Brands ranked on a scale from 1-100



Source: L.E.K. 2023 U.S. Footwear and Apparel Brand Heat Index

Figure 2
2023 Brand Heat Index - Men's footwear

Brands ranked on a scale from 1-100



Source: L.E.K. 2023 U.S. Footwear and Apparel Brand Heat Index

Athletic footwear

In athletic footwear, a similar cohort of brands rises to the top for both women and men. Nine out of 10 brands in the top 10 overlap; however, the relative ranking varies widely across women and men.

In women's athletic footwear, On surpassed longtime market leader and last year's top-ranked brand Nike primarily due to its popularity with millennials and Gen X. HOKA also climbed the ranks, surpassing Nike among Gen X consumers, while adidas fell to No. 5 for women from No. 2 last year as its rankings dropped in the millennial and Gen X cohorts. Indeed, for millennials and Gen Xers, comfort is the primary attribute driving popularity, while Gen Z favors brands like Nike, Brand Jordan and adidas over technically focused running brands (see Figure 3).

In men's athletic footwear, Nike and Brand Jordan remain the hottest two brands overall, followed by industry stalwarts adidas and Under Armour. Consistent with the women's category, younger consumers of men's athletic footwear appear to more frequently value attributes like style and appearance, where Nike and Brand

Figure 3

Women's athletic footwear — Top 10, by generation

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	On	100	Nike	100	On	100	On	100
2	Nike	89	Brand Jordan	83	Nike	94	HOKA	81
3	HOKA	88	adidas	70	HOKA	84	Nike	58
4	Brand Jordan	68	On	65	Brand Jordan	72	Under Armour	45
5	adidas	66	HOKA	61	adidas	70	NOBULL	44
6	Under Armour	61	New Balance	59	Under Armour	65	adidas	40
7	New Balance	50	Under Armour	49	Brooks	47	Brand Jordan	35
8	NOBULL		PUMA	43	New Balance	42	New Balance	32
9	Brooks	44	NOBULL	42	NOBULL	41	Altra	31
10	PUMA	40	Reebok	41	Ryka	39	PUMA	26

Source: L.E.K. survey and analysis

Jordan perform well. Gen X rates HOKA more highly than do other cohorts, largely due to perceived quality and durability. On, by contrast, appears to be gaining less popularity with men than with women, though it is now in the top 10 for all but Gen Z men (see Figure 4).

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	HOKA	100
2	Brand Jordan	93	Brand Jordan	96	Brand Jordan	85	Brand Jordan	91
3	adidas	66	adidas	62	Under Armour	77	Nike	90
4	Under Armour	65	Champion	52	adidas	74	On	87
5	HOKA	60	New Balance	51	On	62	Under Armour	65
6	On	59	Under Armour	48	NOBULL	54	adidas	57
7	New Balance	48	PUMA	43	HOKA	52	New Balance	53
8	NOBULL	44	Brooks	31	PUMA	51	NOBULL	48
9	PUMA		HOKA		Champion	45	PUMA	38
10	Champion	40	Reebok		Reebok		Asics	33

Source: L.E.K. survey and analysis

Casual footwear

In casual footwear, the hottest brands are those with distinctive and identifiable silhouettes. HEYDUDE dominates in popularity for both women and men, while Crocs, Vans, Converse, UGG and Allbirds also appear in the top 10 lists for both genders.

On the women's side, the top two brands — HEYDUDE and Crocs — are frequently cited for their comfort and rank in the top five for all generations. They also occupy the top two spots among Gen Z and millennials. HEYDUDE is a notable standout with Gen Xers (earning nearly double the score of No. 2 Kizik), who call out its on-trend style. UGG and BIRKENSTOCK have shifted down the list since last year (they were formerly No. 1 and No. 3, respectively), while Dr. Martens maintained its position. All three brands perform most strongly with Gen Z. Meanwhile, VEJA entered the top 10 this year while Rothy's fell out; both perform more strongly with older generations (see Figure 5).

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>Crocs</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>78</td><td>HEYDUDE</td><td>87</td><td>Crocs</td><td>71</td><td>Kizik</td><td>54</td></tr>
<tr><td>3</td><td>Vans</td><td>66</td><td>Dr. Martens</td><td>83</td><td>Vans</td><td>62</td><td>VEJA</td><td>49</td></tr>
<tr><td>4</td><td>Converse</td><td>62</td><td>UGG</td><td>80</td><td>Converse</td><td>54</td><td>Skechers</td><td>47</td></tr>
<tr><td>5</td><td>UGG</td><td>61</td><td>Vans</td><td>79</td><td>OluKai</td><td>48</td><td>Crocs</td><td>45</td></tr>
<tr><td>6</td><td>Dr. Martens</td><td>59</td><td>Converse</td><td>72</td><td>Dr. Martens</td><td>46</td><td>Converse</td><td rowspan="2">42</td></tr>
<tr><td>7</td><td>BIRKENSTOCK</td><td>51</td><td>BIRKENSTOCK</td><td>63</td><td>BIRKENSTOCK</td><td rowspan="2">45</td><td>UGG</td></tr>
<tr><td>8</td><td>OluKai</td><td>47</td><td>Timberland</td><td>54</td><td>UGG</td><td>Vans</td><td>39</td></tr>
<tr><td>9</td><td>Allbirds</td><td>46</td><td>Calvin Klein</td><td>46</td><td>VEJA</td><td>44</td><td>Rothy's</td><td>37</td></tr>
<tr><td>10</td><td>VEJA</td><td>45</td><td>ALDO</td><td>45</td><td>Allbirds</td><td>43</td><td>Oofos</td><td>36</td></tr>
</table>

Source: L.E.K. survey and analysis

In men's casual footwear, HEYDUDE tops the list across all generations. While other brands are hot on its tail among members of Gen Z, there is a material gap associated with the No. 2 brand among millennial and Gen X men. Vans, Timberland and Converse are the Nos. 2, 4 and 5 brands, respectively, and perform similarly across generations. Crocs, at No. 3 overall, performs strongly among Gen Z and millennial men (No. 2 in both) but comes in at No. 9 among Gen X. Conversely, Skechers ranks second for male Gen X consumers but does not crack the top 10 in the younger age groups (see Figure 6).

Figure 6
Men's casual footwear — Top 10, by generation

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	HEYDUDE	100	HEYDUDE	100	HEYDUDE	100	HEYDUDE	100
2	Vans	71	Crocs	98	Crocs	71	Skechers	87
3	Crocs	70	Vans	90	Timberland	70	Timberland	70
4	Timberland	68	Polo Ralph Lauren	72	Vans	66	Vans	66
5	Converse	54	Timberland	67	Converse	53	Allbirds	62
6	Allbirds	53	Converse	64	Allbirds	52	Greats	61
7	Polo Ralph Lauren	49	Peter Millar		Polo Ralph Lauren		Converse	57
8	OluKai	42	Tommy Hilfiger	63	Lacoste	49	OluKai	54
9	Skechers	41	UGG		VEJA	45	Crocs	50
10	UGG	40	Clarks	56	Ariat	44	Oofos	48

Source: L.E.K. survey and analysis

Outdoor footwear

The range of performance across the top 10 brands in outdoor footwear is also quite large, with notably low consumer enthusiasm beyond the leading players. From a gender perspective, Columbia is one of the top brands for both women and men while the others vary.

In women's outdoor footwear, UGG is considered the hottest brand across generations due to its appealing style. Columbia and Hunter Boots round out the top three spots overall but show greater popularity among Gen Z and millennials. Younger consumers also show a preference for outdoor/active sandal brands, with Chaco, REEF and Teva all making the top 10 for Gen Z. SOREL and BEARPAW are the Nos. 2 and 3 brands for Gen X, respectively, but have slipped in rankings for younger consumers relative to prior years (see Figure 7).

In men's outdoor footwear, Timberland and Columbia are the top two brands overall and across generations, with Columbia narrowly surpassing Timberland — and only among millennials. When asked about attributes driving popularity, survey respondents suggest that style underlies the brand heat for Timberland while comfort is key for Columbia. Relative to last year, Arc'teryx and KEEN have dropped significantly in the rankings, especially among Gen X consumers who previously rated the brands in the top two spots. Conversely, Oakley has gained popularity with Gen X, jumping from No. 8 last year to No. 3 this year (see Figure 8).

Figure 7

Women's outdoor footwear — Top 10, by generation

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	UGG	100	UGG	100	UGG	100	UGG	100
2	Columbia	70	Columbia	69	Hunter Boots	87	SOREL	75
3	Hunter Boots	59	Hunter Boots	49	Columbia	84	BEARPAW	72
4	Muck Boots	51	Chaco	46	Muck Boots	56	Muck Boots	68
5	SOREL	49	BEARPAW	44	SOREL	53	REEF	63
6	BEARPAW	46	Muck Boots	40	BEARPAW	42	Arc'teryx	62
7	Arc'teryx	38	REEF	33	Salomon	37	Columbia	59
8	KEEN	26	LL Bean	31	LL Bean	36	KEEN	46
9	REEF		Teva	30	KEEN	35	Hunter Boots	34
10	Salomon	23	Helly Hansen	26	Merrell	30	Chaco	30

Source: L.E.K. survey and analysis

Figure 8

Men's outdoor footwear — Top 10, by generation

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Timberland	100	Timberland	100	Columbia	100	Timberland	100
2	Columbia	91	Columbia	81	Timberland	97	Columbia	83
3	Oakley	60	LL Bean	71	CAT Footwear	65	Oakley	74
4	CAT Footwear	54	UGG	67	Danner	62	Merrell	52
5	LL Bean	52	Oakley	59	Merrell	59	Salomon	50
6	UGG	51	CAT Footwear	51	Oakley		CAT Footwear	45
7	Merrell	47	Chaco	46	LL Bean	58	UGG	41
8	Danner	39	Arc'teryx	37	BEARPAW	55	Arc'teryx	40
9	Arc'teryx	37	Eddie Bauer	36	UGG	53	LL Bean	39
10	Salomon	35	Bates	31	Eddie Bauer	48	KEEN	38

Source: L.E.K. survey and analysis

Dress footwear

In dress footwear, the top 10 brands vary significantly across genders, with only Steve Madden appearing on both the women's and men's lists.

In women's dress footwear, the leading players are fairly consistent with last year's findings — Steve Madden, Coach and Michael Kors maintained the top three spots overall, followed by established brands like kate spade, Calvin Klein and Sam Edelman. Style and overall brand appeal are the most commonly cited factors behind the popularity of the top brands, while comfort is emphasized far less compared with other footwear categories. From a generational perspective, Steve Madden performs the strongest with younger consumers (i.e., Gen Z and millennials) while kate spade performs best with Gen X (see Figure 9).

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>Steve Madden</td><td>100</td><td>Steve Madden</td><td>100</td><td>Steve Madden</td><td>100</td><td>kate spade</td><td>100</td></tr>
<tr><td>2</td><td>Coach</td><td>81</td><td>Coach</td><td>89</td><td>Sam Edelman</td><td>78</td><td>Coach</td><td>94</td></tr>
<tr><td>3</td><td>Michael Kors</td><td>79</td><td>kate spade</td><td>85</td><td>Michael Kors</td><td>70</td><td>Michael Kors</td><td>91</td></tr>
<tr><td>4</td><td>kate spade</td><td>72</td><td>Calvin Klein</td><td rowspan="2">82</td><td>Coach</td><td>67</td><td>Schutz</td><td>80</td></tr>
<tr><td>5</td><td>Calvin Klein</td><td>66</td><td>Michael Kors</td><td>Vince Camuto</td><td>63</td><td>Jeffrey Campbell</td><td>77</td></tr>
<tr><td>6</td><td>Sam Edelman</td><td>62</td><td>Guess</td><td>76</td><td>Calvin Klein</td><td>61</td><td>Steve Madden</td><td>73</td></tr>
<tr><td>7</td><td>Vince Camuto</td><td>57</td><td>Betsey Johnson</td><td>62</td><td>Sarah Flint</td><td>60</td><td>Ted Baker</td><td>68</td></tr>
<tr><td>8</td><td>Dolce Vita</td><td>48</td><td>Marc Fisher</td><td>59</td><td>Vince</td><td>58</td><td>Vince Camuto</td><td>67</td></tr>
<tr><td>9</td><td>JustFab</td><td>46</td><td>Nina</td><td rowspan="2">58</td><td>JustFab</td><td>56</td><td>Calvin Klein</td><td>65</td></tr>
<tr><td>10</td><td>M.Gemi</td><td>45</td><td>Nine West</td><td>kate spade</td><td>54</td><td>Nine West</td><td>64</td></tr>
</table>

Source: L.E.K. survey and analysis

Men's dress footwear preferences vary across generations. Cole Haan and Ferragamo are the hottest brands overall, with Cole Haan being the most popular choice among Gen X consumers and Ferragamo performing strongly with Gen Z and millennials. Comfort typically underpins Cole Haan's popularity, whereas style is behind the popularity of Ferragamo. The biggest shift since last year's rankings is HUGO BOSS' drop from the top spot to No. 8. And several new brands have entered the bottom half of the top 10 — including Jack Erwin, Sandro Moscoloni and Wolf & Shepherd — due to their popularity with millennials. Also worth noting is that Gen Z men have less engagement with this category than they do with others, as evidenced by their material awareness of just 10 dress footwear brands. This is likely a result of the casualization trend, which is highly prominent among younger generations and has been amplified by the shift to work from home (see Figure 10).

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

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Cole Haan	100	Ferragamo	100	Ferragamo	100	Cole Haan	100
2	Ferragamo	98	ALDO	91	Cole Haan	81	Kenneth Cole	88
3	Kenneth Cole	86	Tommy Hilfiger	80	Stacy Adams	76	Stacy Adams	70
4	Stacy Adams	84	Kenneth Cole	77	Sandro Moscoloni	71	Johnston & Murphy	65
5	ALDO	65	HUGO BOSS	72	Tommy Hilfiger	67	Allen Edmonds	62
6	Jack Erwin	59	Stacy Adams		Kenneth Cole	65	Alden	56
7	Steve Madden	58	Steve Madden	65	Jack Erwin	64	HUGO BOSS	55
8	HUGO BOSS	57	Cole Haan	61	Steve Madden	58	Ferragamo	52
9	Sandro Moscoloni		Alfani	44	ALDO	54	Nisolo	51
10	Wolf & Shepherd	50	Johnston & Murphy	1	Johnston & Murphy		Tod's	

Source: L.E.K. survey and analysis

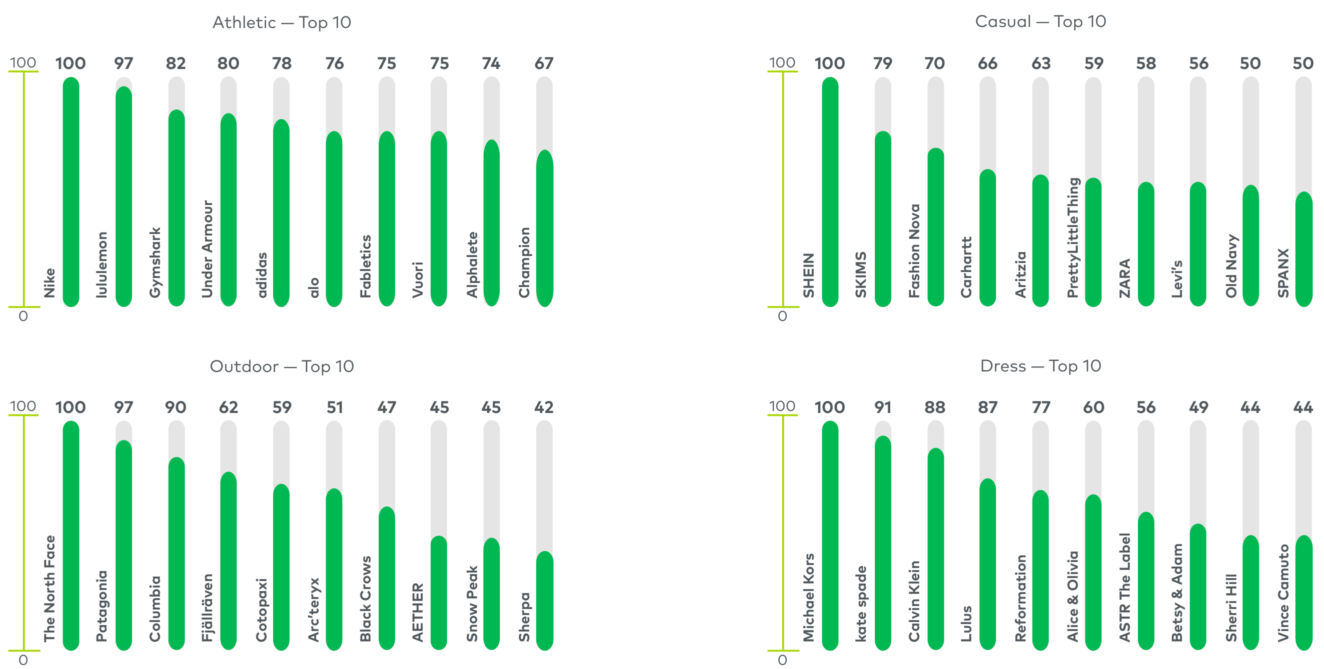
Apparel

As with footwear, a number of apparel brands show consistently high performance across survey respondents and within certain categories (see Figures 11 and 12). In athletic apparel, Nike again leads across genders, while The North Face, Columbia and Patagonia perform highest in both women's and men's outdoor apparel. In dress apparel, Michael Kors and Calvin Klein are among the top performers for women and men, while SHEIN and Carhartt are trending among men and women for casual clothing.

Figure 11

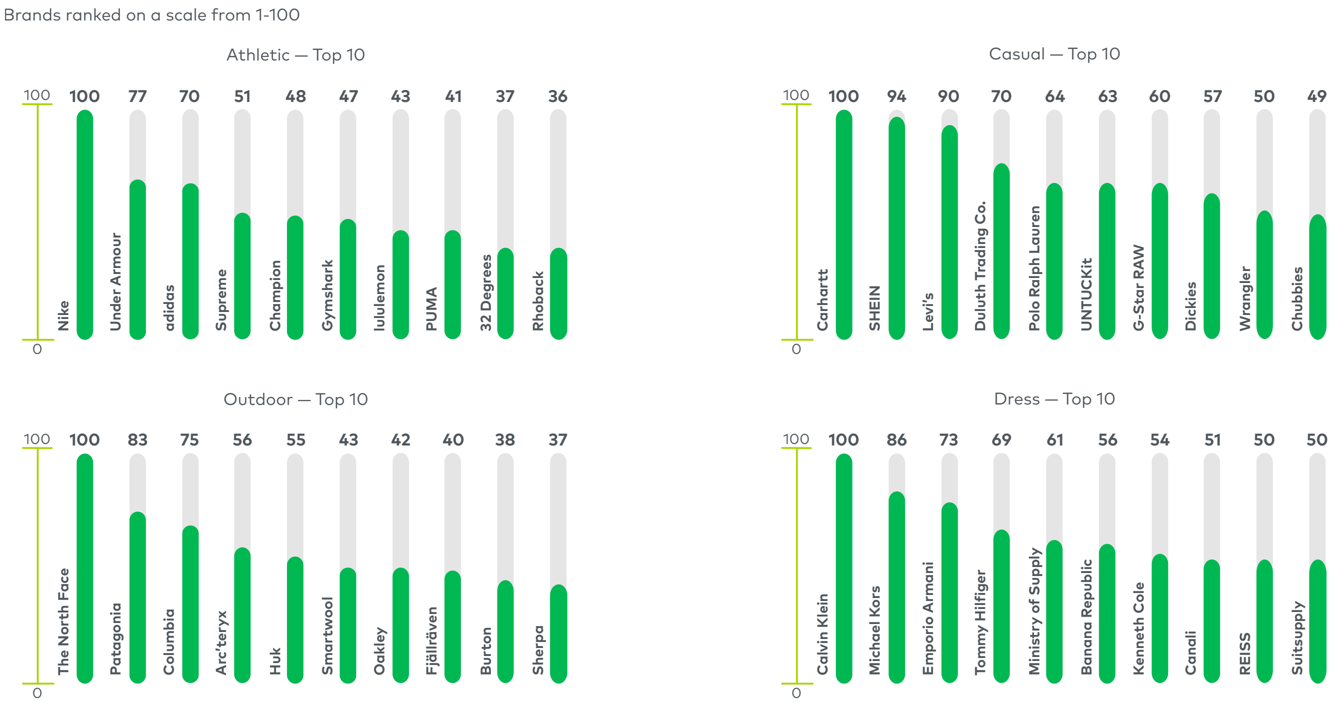
2023 Brand Heat Index - Women's apparel

Brands ranked on a scale from 1-100



Source: L.E.K. 2023 U.S. Footwear and Apparel Brand Heat Index

Figure 12
2023 Brand Heat Index - Men's apparel



Source: L.E.K. 2023 U.S. Footwear and Apparel Brand Heat Index

Athletic clothing

In athletic clothing, there is meaningful overlap in the leading brands across genders — Nike remains the top brand for both women and men, while lululemon, Gymshark, Under Armour, Champion and adidas also show up on both Top 10 lists.

Similar to last year, Nike and lululemon take the top spots for women's athletic clothing, with lululemon closing in on Nike in terms of heat score (rising to 97 from 77 last year). In addition to Under Armour and adidas, a range of smaller athleisure brands fill out the list (e.g., Gymshark, alo, Fabletics, Vuori and Alphalete), all of which saw their heat scores improve since last year.

In particular, alo only appeared on the Gen X list last year, but it is a top player across all generations this year; survey respondents cite its premium positioning and social media presence (e.g., influencers, TikTok) as key reasons for its jump in popularity. Gymshark shows comparative strength with younger consumers, coming in third among Gen Z respondents (see Figure 13).

Figure 13
Women's athletic apparel — Top 10, by generation

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Nike	100	Nike	100	Nike	100	lululemon	100
2	lululemon	97	lululemon	97	Vuori	94	Under Armour	99
3	Gymshark	82	Gymshark	75	alo	91	Nike	87
4	Under Armour	80	Fabletics	71	lululemon	88	Vuori	74
5	adidas	78	Alphalete	66	adidas	87	32 Degrees	67
6	alo	76	adidas	65	Gymshark	86	adidas	65
7	Fabletics	75	Champion	61	Fabletics	85	Athleta	61
8	Vuori		alo	54	Under Armour	84	Champion	
9	Alphalete	74	Athleta	44	Alphalete	80	alo	58
10	Champion	67	Ryderwear		Athleta	76	90 Degree by Reflex	

Source: L.E.K. survey and analysis

Nike has a stronger position in men's athletic clothing than it does in men's athletic footwear, with a larger gap between Nike and its closest competitor brand in the No. 2 spot. After Nike, the rest of the top five brands are largely the same as last year, with a focus on large athletic veterans (Under Armour, adidas and Champion). The latter half of the list, however, has seen an influx of athleisure and smaller brands — Gymshark, 32 Degrees and Rhoback have now joined lululemon in the top 10. And the preference levels for many of these brands vary across generations; for example, Gymshark performs best with Gen Z consumers while appearing lower in the rankings for millennials and Gen X (see Figure 14).

Figure 14
Men's athletic apparel — Top 10, by generation

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Nike	100	Nike	100	Nike	100	Under Armour	100
2	Under Armour	77	adidas	59	Under Armour	85	Nike	90
3	adidas	70	Champion	58	adidas	78	adidas	69
4	Supreme	51	Gymshark	51	Supreme	59	Supreme	53
5	Champion	48	Fabletics	48	Western Rise	57	lululemon	50
6	Gymshark	47	lululemon	46	Gymshark	52	PUMA	47
7	lululemon	43	Under Armour	44	Champion	51	Champion	45
8	PUMA	41	32 Degrees	42	alo	49	32 Degrees	43
9	32 Degrees	37	Supreme		Rhoback		Rabbit	38
10	Rhoback	36	PUMA	40	PUMA	48	Gymshark	37

Source: L.E.K. survey and analysis

Casual clothing

In women's casual clothing, fast fashion labels continued their strong performance, with SHEIN again taking the top spot overall. Fashion Nova, PrettyLittleThing and ZARA are also in the top 10. SKIMS and SPANX, legacy shapewear brands that have extended into casual clothing, are new additions to the Top 10 list this year, with survey respondents citing both their comfort and style. Relative to last year, Aritzia has shown a strong growth trajectory, ranking No. 5 overall and in the top 10 for both Gen Z and millennials. More traditional brands like Old Navy and Levi's perform the strongest among Gen X (see Figure 15).

Figure 15

Women's casual apparel — Top 10, by generation

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	SHEIN	100	SKIMS	100	SHEIN	100	SHEIN	100
2	SKIMS	79	SHEIN	94	Fashion Nova	67	SKIMS	82
3	Fashion Nova	70	ZARA	72	Carhartt	64	Carhartt	72
4	Carhartt	66	Aritzia	71	SKIMS	61	Fashion Nova	69
5	Aritzia	63	Carhartt	67	PrettyLittleThing	60	Old Navy	
6	PrettyLittleThing	59	Fashion Nova	66	Aritzia	57	Levi's	64
7	ZARA	58	Princess Polly	58	Mango	55	boohoo	63
8	Levi's	56	Levi's	57	SPANX		Good American	60
9	Old Navy	50	UNIQLO	56	ZARA	53	Tory Burch	58
10	SPANX		Juicy Couture	55	Levi's	52	SPANX	56

Source: L.E.K. survey and analysis

In men's casual clothing, workwear players dominate — Carhartt, Levi's, Duluth Trading Co., Dickies and Wrangler all show up in the top 10 across generations. Carhartt has taken over the top spot (from Levi's) both overall and among Gen X consumers, and it is rising significantly among Gen Z and millennials. Duluth has also shown marked improvement in performance, now appearing in the top 10 for all age groups after only appearing in Gen X's ranking the prior year. Fast fashion brand SHEIN also excels, with a No. 2 overall ranking and top performance among Gen Z consumers. H&M and ZARA also appear in the top 10 for Gen Z, reinforcing the fact that value and style freshness continue to be priorities with that cohort (see Figure 16).

Figure 16
Men's casual apparel — 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>SHEIN</td><td>100</td><td>Levi's</td><td>100</td><td>Carhartt</td><td>100</td></tr>
<tr><td>2</td><td>SHEIN</td><td>94</td><td>Carhartt</td><td>86</td><td>Carhartt</td><td>99</td><td>Duluth Trading Co.</td><td>83</td></tr>
<tr><td>3</td><td>Levi's</td><td>90</td><td>G-Star RAW</td><td rowspan="3">73</td><td>Chubbies</td><td>81</td><td>Levi's</td><td>81</td></tr>
<tr><td>4</td><td>Duluth Trading Co.</td><td>70</td><td>Polo Ralph Lauren</td><td>SHEIN</td><td>77</td><td>SHEIN</td><td>75</td></tr>
<tr><td>5</td><td>Polo Ralph Lauren</td><td>64</td><td>Tommy Hilfiger</td><td>Polo Ralph Lauren</td><td>73</td><td>Superdry</td><td>74</td></tr>
<tr><td>6</td><td>UNTUCKit</td><td>63</td><td>Levi's</td><td>72</td><td>UNTUCKit</td><td>72</td><td>Marine Layer</td><td>67</td></tr>
<tr><td>7</td><td>G-Star RAW</td><td>60</td><td>H&M</td><td>65</td><td>ASOS</td><td rowspan="2">71</td><td>UNTUCKit</td><td>65</td></tr>
<tr><td>8</td><td>Dickies</td><td>57</td><td>Duluth Trading Co.</td><td rowspan="2">63</td><td>Old Navy</td><td>AG</td><td>63</td></tr>
<tr><td>9</td><td>Wrangler</td><td>50</td><td>ZARA</td><td>Dickies</td><td rowspan="2">69</td><td>Dickies</td><td rowspan="2">57</td></tr>
<tr><td>10</td><td>Chubbies</td><td>49</td><td>True Religion</td><td>59</td><td>Duluth Trading Co.</td><td>G-Star RAW</td></tr>
</table>

Source: L.E.K. survey and analysis

Outdoor clothing

For both women's and men's outdoor apparel, stalwart brands The North Face, Columbia and Patagonia again top the list in varying permutations across generations.

In the women's category, The North Face leads overall, while Columbia has risen to become the No. 1 brand among millennials. Across the top three incumbent brands (The North Face, Patagonia and Columbia), survey respondents cite overall brand appeal and quality as key drivers of popularity, though Patagonia indexes more toward brand purpose and style and Columbia indexes more toward comfort. Cotopaxi and Fjällräven have both shown improvement since last year, with Cotopaxi performing strongly with both Gen Z and millennials, while Fjällräven is gaining popularity with Gen X (see Figure 17).

In men's outdoor apparel, The North Face, Patagonia and Columbia earned the Nos. 1, 2 and 3 spots, respectively, in each generation, demonstrating outdoor apparel's much greater consistency in brand trajectory across generations compared with other

Figure 17

Women's outdoor apparel — 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>Columbia</td><td>100</td><td>The North Face</td><td>100</td></tr>
<tr><td>2</td><td>Patagonia</td><td>97</td><td>Patagonia</td><td>90</td><td>Patagonia</td><td>98</td><td>Patagonia</td><td>96</td></tr>
<tr><td>3</td><td>Columbia</td><td>90</td><td>Columbia</td><td>81</td><td>The North Face</td><td>96</td><td>Fjällräven</td><td>79</td></tr>
<tr><td>4</td><td>Fjällräven</td><td>62</td><td>Cotopaxi</td><td>77</td><td>Cotopaxi</td><td>72</td><td>Columbia</td><td>76</td></tr>
<tr><td>5</td><td>Cotopaxi</td><td>59</td><td>Snow Peak</td><td>63</td><td>Fjällräven</td><td>56</td><td>Arc'teryx</td><td>63</td></tr>
<tr><td>6</td><td>Arc'teryx</td><td>51</td><td>Black Crows</td><td rowspan="2">56</td><td>Sherpa</td><td>47</td><td>AETHER</td><td>59</td></tr>
<tr><td>7</td><td>Black Crows</td><td>47</td><td>Eddie Bauer</td><td>Free Country</td><td>44</td><td>Coalatree</td><td>57</td></tr>
<tr><td>8</td><td>AETHER</td><td rowspan="2">45</td><td>Outdoor Research</td><td>54</td><td>Free Fly</td><td>40</td><td>NRS</td><td>48</td></tr>
<tr><td>9</td><td>Snow Peak</td><td>Arc'teryx</td><td>49</td><td>Arc'teryx</td><td>38</td><td>Mackage</td><td>43</td></tr>
<tr><td>10</td><td>Sherpa</td><td>42</td><td>LL Bean</td><td>47</td><td>Smartwool</td><td>36</td><td>Smartwool</td><td>42</td></tr>
</table>

Source: L.E.K. survey and analysis

apparel categories. Smaller fishing lifestyle brand Huk has shown strong growth since last year, coming in at No. 5 overall (up from No. 10 last year). And Arc'teryx has broken into the top 10 in all age groups this year after not appearing in the top 10 previously, with survey respondents citing materials, durability and technical performance as key drivers (see Figure 18).

Figure 18

Men's outdoor apparel — 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>83</td><td>Patagonia</td><td>98</td><td>Patagonia</td><td>79</td><td>Patagonia</td><td>93</td></tr>
<tr><td>3</td><td>Columbia</td><td>75</td><td>Columbia</td><td>89</td><td>Columbia</td><td>72</td><td>Columbia</td><td>87</td></tr>
<tr><td>4</td><td>Arc'teryx</td><td>56</td><td>Oakley</td><td>63</td><td>Huk</td><td>60</td><td>Huk</td><td>76</td></tr>
<tr><td>5</td><td>Huk</td><td>55</td><td>Helly Hansen</td><td>61</td><td>Arc'teryx</td><td>59</td><td>Arc'teryx</td><td>69</td></tr>
<tr><td>6</td><td>Smartwool</td><td>43</td><td>Arc'teryx</td><td>57</td><td>Smartwool</td><td>56</td><td>Fjällräven</td><td>57</td></tr>
<tr><td>7</td><td>Oakley</td><td>42</td><td>Marmot</td><td>44</td><td>Sherpa</td><td>55</td><td>Marmot</td><td>53</td></tr>
<tr><td>8</td><td>Fjällräven</td><td>40</td><td>Eddie Bauer</td><td>42</td><td>Burton</td><td>53</td><td>LL Bean</td><td>51</td></tr>
<tr><td>9</td><td>Burton</td><td>38</td><td>Kuhl</td><td>40</td><td>Fjällräven</td><td>51</td><td>Free Country</td><td rowspan="2">49</td></tr>
<tr><td>10</td><td>Sherpa</td><td>37</td><td>Salomon</td><td>39</td><td>Salt Life</td><td>50</td><td>Smartwool</td></tr>
</table>

Source: L.E.K. survey and analysis

Dress clothing

Calvin Klein and Michael Kors are among the leaders in both women's and men's dress clothing, while the remaining brands differ between the two genders.

The top 10 brands for women's dress apparel are a mix of specialty retail brands, direct-to-consumer (DTC) brands and wholesale businesses. Michael Kors, kate spade and Calvin Klein again top the list, though kate spade has inched ahead of Calvin Klein this year. The remainder of the top 10 has shown a lot of movement since last year, with Lulus and Reformation as the most notable growth stories, now ranking at No. 4 and No. 5 overall, respectively. Those DTC brands perform strongest among Gen Z and millennials, with style as the reason for their growing popularity relative to others in the top 10 (see Figure 19).

Figure 19

Women's dress apparel — 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>Calvin Klein</td><td>100</td><td>Michael Kors</td><td>100</td><td>kate spade</td><td rowspan="2">100</td></tr>
<tr><td>2</td><td>kate spade</td><td>91</td><td>Reformation</td><td>94</td><td>Lulus</td><td>90</td><td>Michael Kors</td></tr>
<tr><td>3</td><td>Calvin Klein</td><td>88</td><td>Michael Kors</td><td>80</td><td>kate spade</td><td>85</td><td>Mac Duggal</td><td>91</td></tr>
<tr><td>4</td><td>Lulus</td><td>87</td><td>kate spade</td><td>78</td><td>Reformation</td><td>80</td><td>Sherri Hill</td><td>87</td></tr>
<tr><td>5</td><td>Reformation</td><td>77</td><td>Lulus</td><td>74</td><td>Maje</td><td>72</td><td>Lulus</td><td>81</td></tr>
<tr><td>6</td><td>Alice & Olivia</td><td>60</td><td>GANNI</td><td>66</td><td>Calvin Klein</td><td>71</td><td>Alice & Olivia</td><td>75</td></tr>
<tr><td>7</td><td>ASTR The Label</td><td>56</td><td>Sherri Hill</td><td>58</td><td>ASTR The Label</td><td>68</td><td>Calvin Klein</td><td>68</td></tr>
<tr><td>8</td><td>Betsy & Adam</td><td>49</td><td>CeCe</td><td>57</td><td>Alice & Olivia</td><td>67</td><td>Milly</td><td rowspan="2">67</td></tr>
<tr><td>9</td><td>Sherri Hill</td><td rowspan="2">44</td><td>HUGO BOSS</td><td>55</td><td>Banana Republic</td><td>57</td><td>Susana Monaco</td></tr>
<tr><td>10</td><td>Vince Camuto</td><td>Club Monaco</td><td>54</td><td>Retrofête</td><td>55</td><td>Tahari</td><td>63</td></tr>
</table>

Source: L.E.K. survey and analysis

The men's dress clothing category is again led by Calvin Klein and Michael Kors. Meanwhile, Emporio Armani, Ministry of Supply and Banana Republic have all improved their brand heat scores by more than 10 points relative to last year, whereas HUGO BOSS has fallen off the Top 10 list. Among DTC brands, Suitsupply made it onto the overall Top 10 list this year, performing most strongly among Gen Z and millennials. Also on the Top 10 list, Bonobos is outperforming among millennials and Indochino is gaining popularity most with Gen X (see Figure 20).

Figure 20
Men's dress apparel — Top 10, by generation

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Calvin Klein	100	Calvin Klein	100	Michael Kors	100	Calvin Klein	100
2	Michael Kors	86	Tommy Hilfiger	82	Calvin Klein	89	Kenneth Cole	87
3	Emporio Armani	73	Michael Kors	73	Emporio Armani	83	Emporio Armani	81
4	Tommy Hilfiger	69	Emporio Armani	56	REISS	80	Banana Republic	76
5	Ministry of Supply	61	Banana Republic	44	Bonobos	73	Theory	73
6	Banana Republic	56	Kenneth Cole		Ministry of Supply	72	Michael Kors	68
7	Kenneth Cole	54	Suitsupply	43	Canali	71	Indochino	62
8	Canali	51	HUGO BOSS	42	Tommy Hilfiger		Zegna	57
9	REISS	50	Jos. A. Bank		Suitsupply	62	J.Crew	56
10	Suitsupply		Club Monaco	41	Banana Republic	59	Ministry of Supply	54

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 point to the importance of recognizing that consumers are not all the same and that deep understanding and tailored strategies are required 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, there's no room to rest.

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. Please don't hesitate to contact us.

Endnote

[1]Insider, "The 40-year-old millennial and the 24-year-old Gen Zer are in charge of America right now." https://www.businessinsider.com/24-gen-z-trends-40-millennial-spending-changing-economy-2021-9

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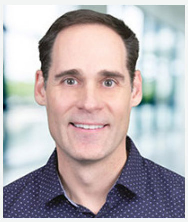
Chris Randall is a Managing Director and Partner in L.E.K. Consulting's Boston office and serves as Global Co-Head of the firm's Consumer sector. Chris has extensive experience in footwear and apparel, sporting goods, home and household products, and other durable goods. He advises retailers and brands 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

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Jon Weber is a Managing Director and Partner in L.E.K.'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.

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