LEK

SPECIAL REPORT

2025 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

In today's crowded marketplace, it is harder than ever to make your brand stand out and do so in a durable way. Further, each generation has unique perspectives on the brands they desire and the factors that are most important to them. L.E.K. Consulting's fourth annual Brand Heat Index reveals which brands are gaining popularity (i.e., increasing their "brand heat") across major product categories in footwear and apparel. Importantly, our index breaks this down by gender and generational cohort, demonstrating how "heat" differs across consumer segments. The insight provided by the Brand Heat Index is intended to bring a more nuanced view to brand trajectory and what drives it up, which should ultimately enhance strategic decision-making.

The Brand Heat Index is based on a survey of nearly 5,000 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 greatest upward trajectory with shoppers, not necessarily the brands' 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	Athletic sneakers, 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, work boots	Hiking clothes, fishing clothes, fleeces, performance jackets
Dress	Heels, loafers, oxfords	Suiting, dresses

This year's Brand Heat Index reveals several noteworthy consumer trends:

- Athletic and outdoor/rugged brands are the hottest overall, suggesting that consumers are continuing to choose performance pieces in their everyday lives.

- At the same time, there is more excitement about the dress category than in previous years, suggesting some recovery from pandemic-driven lows. This is evidenced by higher purchasing rates of dress footwear and apparel among younger generations and higher average brand heat scores across categories.

- Competition at the top continues to be intense, particularly in footwear, where the No. 1 brand changed in five out of eight categories since last year. Further, the top three brands are frequently separated by razor-thin margins.

- Consumer feedback indicates that a compelling social media presence is a key driver of brand heat (particularly among younger generations), but distinct and original products and a clear brand personality distinguish the brands that stay on top from those that are a flash in the pan.

- Importantly, brand heat differs meaningfully by gender and generation, with women and younger generations having a higher proportion of newcomer brands on their top 10 lists.

In the pages that follow, 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 2025, competition in the footwear space remains intense, with brand heat scores tightly clustered among the top three brands across categories. Consumers continue to be driven by iconic silhouettes and a blend of form and function, as demonstrated by the popularity of athletic brands and comfort-driven brands (e.g., Crocs, HEYDUDE, UGG) in casual footwear.

Athletic footwear brands tend to engender the most excitement from consumers overall, but dress footwear has picked up materially since last year, particularly among Generation Z, which had previously been quite disengaged in the category.

In general, the leading footwear brands are more consistent across genders than are apparel brands, with around 24 brands showing up in the top 10 for both women's and men's footwear in their respective categories (see Figures 1 and 2).

Figure 1

Women's footwear

Brands ranked on a scale of 1-100

*NR=not ranked in prior year survey
Source: L.E.K. survey and analysis

Figure 2
Men's footwear
Brands ranked on a scale of 1-100

*NR=not ranked in prior year survey
Source: L.E.K. survey and analysis

Athletic footwear

Key themes:

- While the **top 10 brands in athletic footwear remain fairly consistent year over year** and across genders, the competition within the top 10 is increasingly fierce as top competitors trade spots and relative heat scores narrow.

- **Nike has managed to stave off competitors** and maintain its leadership position this year for many generational cohorts, but the **margin is thin**, particularly among women, with On and HOKA surpassing the industry behemoth in key generations. In general, **legacy brands perform more strongly with men than with women** (see Figures 3 and 4).

- Even beyond On and HOKA, **running heritage brands are seeing growing success**, with New Balance, Brooks and ASICS increasing their heat scores year over year.

Women's athletic footwear — noteworthy moves:

- Nike has reclaimed the top spot from On, but these two brands and HOKA all sit within three points of one another in the overall rankings. From a generational perspective, On takes the top spot among Gen Z, Nike among millennials and HOKA among Generation X.

- While adidas remains at the same ranking as last year (No. 5 overall), the brand's heat score has improved across all generations, likely due to the popularity of its Samba model and other key fashion styles.

- New Balance (No. 6 overall) has similarly increased its score across all generations of women. Under Armour and Reebok, on the other hand, have dropped spots, with Reebok falling out of the top 10 entirely.

Men's athletic footwear — noteworthy moves:

- Legacy brands maintain greater dominance among men, with Nike, Jordan Brand and adidas forming the top three overall and across generations. adidas' scores have generally improved year over year, though less so than on the women's side.

- New Balance is showing increasing strength among men, having moved up from No. 7 to No. 5 (with particular strength among Gen Z), while On and HOKA have each dropped a position.

- ASICS, meanwhile, has capitalized on the popularity of running styles to crack the top 10 among Gen Z (in both women's and men's athletic footwear).

Figure 3
Women's athletic 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>Nike</td><td>100</td><td>On</td><td>100</td><td>Nike</td><td>100</td><td>HOKA</td><td>100</td></tr>
<tr><td>2</td><td>On</td><td>99</td><td>Nike</td><td>95</td><td rowspan="2">On/
HOKA</td><td rowspan="2">87</td><td>On</td><td>94</td></tr>
<tr><td>3</td><td>HOKA</td><td>97</td><td>HOKA</td><td>91</td><td>Nike</td><td>86</td></tr>
<tr><td>4</td><td>Jordan Brand</td><td>74</td><td>Jordan Brand</td><td>75</td><td>Jordan Brand</td><td>72</td><td rowspan="2">adidas/
Under Armour</td><td rowspan="2">65</td></tr>
<tr><td>5</td><td>adidas</td><td>72</td><td>New Balance</td><td>74</td><td>adidas</td><td>69</td></tr>
<tr><td>6</td><td>New Balance</td><td>64</td><td>adidas</td><td>72</td><td>Under Armour</td><td>61</td><td>Jordan Brand</td><td>62</td></tr>
<tr><td>7</td><td>Under Armour</td><td>56</td><td>Under Armour</td><td>38</td><td>New Balance</td><td>53</td><td>New Balance</td><td>61</td></tr>
<tr><td>8</td><td>Brooks</td><td>48</td><td>ASICS</td><td>35</td><td>Brooks</td><td>52</td><td>Brooks</td><td>57</td></tr>
<tr><td>9</td><td>APL (Athletic Propulsion Labs)</td><td>41</td><td>Saucony</td><td>34</td><td>NOBULL</td><td>50</td><td>PUMA</td><td>45</td></tr>
<tr><td>10</td><td>PUMA</td><td>40</td><td>Reebok</td><td>31</td><td>PUMA</td><td>48</td><td>Reebok</td><td>41</td></tr>
</table>

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 Brand	84	Jordan Brand	93	adidas	78	Jordan Brand	82
3	adidas	75	adidas	76	Jordan Brand	77	adidas	71
4	Under Armour/ New Balance	56	New Balance	71	Under Armour	58	Under Armour	66
5			Under Armour	55	On	51	On	65
6	On	48	Champion	47	New Balance	50	HOKA	63
7	HOKA	44	Reebok	43	HOKA/ PUMA	45	New Balance	51
8	PUMA	41	PUMA	42			PUMA	46
9	Champion	38	On/ ASICS	40	Champion	42	Reebok	34
10	Reebok	35			Reebok	34	Champion	26

Source: L.E.K. survey and analysis

Casual footwear

Key themes:

- Brands with **distinctive, iconic silhouettes remain on top** in casual footwear for both women and men, as Crocs, HEYDUDE, UGG and Timberland reshuffle across the top three spots.

- Converse and Vans, while also visually distinctive, are in a second tier in terms of brand heat.

- **Consumer demand for comfort** is evident across leading brands and is further supported by SKECHERS rising in the ranks, not just among Gen X but in the top 10 overall across both genders (see Figures 5 and 6).

Women's casual footwear — noteworthy moves:

- UGG takes the No. 1 spot overall this year, with Crocs coming in a close second (only three points behind). HEYDUDE has slipped from No. 1 to No. 3 but is still very close to the top with an overall score of 90. Across generations, UGG shows differential strength with Gen Z, while Crocs and HEYDUDE perform more strongly with millennials.

- The largest gains were shown by SKECHERS, which entered the top 10 overall and rose to No. 1 among Gen X.

- Frye shows the continued strength of the Western trend, rising to No. 3 among Gen Z on the back of a TikTok-driven renaissance, while Dr. Martens continues to slip in the ranks across age cohorts, having previously capitalized on the 1990s fashion revival.

Men's casual footwear — noteworthy moves:

- The men's casual footwear rankings have a fair amount of consistency with last year, with nine out of 10 brands remaining the same.

- Crocs, HEYDUDE and Timberland again make up the top three, but Crocs has retaken the top spot from its sister brand. HEYDUDE has gained among millennials but lost ground to its peers among Gen Z.

- Vans maintains its No. 4 position overall, while Converse has slipped to No. 6.

- Comfort appears to be king, particularly with older generations (millennials and Gen X), where SKECHERS, Kizik, Vionic and OOFOS are climbing up the top 10 lists.

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>UGG</td><td>100</td><td>UGG</td><td>100</td><td>Crocs</td><td>100</td><td>SKECHERS</td><td>100</td></tr>
<tr><td>2</td><td>Crocs</td><td>97</td><td>Crocs</td><td>88</td><td>HEYDUDE</td><td>99</td><td>HEYDUDE</td><td>78</td></tr>
<tr><td>3</td><td>HEYDUDE</td><td>90</td><td rowspan="2">Frye/ HEYDUDE</td><td rowspan="2">72</td><td>UGG</td><td>89</td><td>UGG</td><td>72</td></tr>
<tr><td>4</td><td>Converse</td><td>75</td><td>Converse</td><td>81</td><td>Crocs</td><td>69</td></tr>
<tr><td>5</td><td>Vans</td><td>66</td><td>Converse</td><td>69</td><td>Vans</td><td>71</td><td>OluKai</td><td>65</td></tr>
<tr><td>6</td><td>Birkenstock</td><td>63</td><td rowspan="2">VEJA/ Birkenstock</td><td rowspan="2">68</td><td>SKECHERS</td><td>65</td><td>OOFOS</td><td>62</td></tr>
<tr><td>7</td><td>SKECHERS</td><td>61</td><td>Birkenstock</td><td>64</td><td>Converse</td><td>61</td></tr>
<tr><td>8</td><td>OluKai</td><td>56</td><td rowspan="2">Vans/ Dr. Martens</td><td rowspan="2">63</td><td>Timberland</td><td>60</td><td>Vans</td><td>59</td></tr>
<tr><td>9</td><td>Timberland</td><td>54</td><td>Dr. Martens</td><td>58</td><td>Kizik</td><td>56</td></tr>
<tr><td>10</td><td>Dr. Martens</td><td>53</td><td>Timberland</td><td>55</td><td>OluKai</td><td>56</td><td>Timberland</td><td>53</td></tr>
</table>

Source: L.E.K. survey and analysis

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

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Crocs	100	Crocs	100	HEYDUDE	100	SKECHERS	100
2	HEYDUDE	99	UGG	79	Timberland	96	HEYDUDE	91
3	Timberland	90	Vans	76	Converse	92	Timberland	70
4	Vans	88	HEYDUDE	72	Vans	91	Vans	55
5	Polo Ralph Lauren	77	Timberland	69	Polo Ralph Lauren	87	Polo Ralph Lauren/ Vionic/ Crocs	52
6	Converse	76	Birkenstock	67	Crocs	86		
7	UGG	70	Polo Ralph Lauren	63	SKECHERS	72		
8	SKECHERS	57	Converse	62	Kizik	65	OOFOS/ Axel Arigato	48
9	Tommy Hilfiger	52	Dr. Martens	59	UGG	63		
10	Birkenstock	50	Justin Boots	52	Tommy Hilfiger	59	Converse	45

Source: L.E.K. survey and analysis

Outdoor/rugged footwear

Key themes:

- In 2025, outdoor/rugged footwear rankings demonstrate **the strength of heritage brands** in the space — both traditional outdoor/rugged and Western and work — with Timberland, Columbia, Ariat and Merrell in the top 10 across genders (see Figures 7 and 8).
- While traditionally an apparel-driven brand, **Carhartt has made a push into footwear** and comes in at No. 2 across both rankings.
- The **women's rankings take a slightly more fashion-driven approach** to the category, with UGG topping the list, while men's rankings skew more outdoor/rugged.

Women's outdoor/rugged footwear — noteworthy moves:

- UGG continues its dominance across all generations, often leading over the No. 2 brand by 20-plus points.
- Carhartt, Timberland and Columbia make up the next tier of brands, taking the second to fourth spots in some variation.

- After these consistent leaders, however, there is some notable variance across generations and key year-over-year movements:
    - Ariat has ascended in the rankings across generations, though it still performs most strongly among Gen X.
    - Salomon is spiking with Gen Z and Arc'teryx is spiking with millennials, while SOREL has lost a step, particularly among millennials (where it fell out of the top 10).

Men's outdoor/rugged footwear — noteworthy moves:

- Men's outdoor/rugged footwear has greater competition at the top, with Timberland, Carhartt and Columbia trading the top spot overall and across generations.
- Work brands tend to dominate this category, with Ariat, Cat Footwear and Red Wing Shoes rounding out the top 10.
- Among hiking/trail brands, Salomon shows strength with Gen Z and millennials, while Merrell's strength is with millennials and Gen X.

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>UGG</td><td>100</td><td>UGG</td><td>100</td></tr>
<tr><td>2</td><td>Carhartt</td><td>71</td><td>Carhartt</td><td>69</td><td>Carhartt</td><td>84</td><td>Timberland</td><td>82</td></tr>
<tr><td>3</td><td>Timberland</td><td>70</td><td>Timberland</td><td>68</td><td>Columbia</td><td>81</td><td>Columbia</td><td>73</td></tr>
<tr><td>4</td><td>Columbia</td><td>65</td><td>Columbia</td><td>57</td><td>Timberland</td><td>74</td><td rowspan="2">Ariat/
Carhartt</td><td rowspan="2">67</td></tr>
<tr><td>5</td><td>Ariat</td><td>52</td><td>BEARPAW</td><td>54</td><td>Ariat</td><td>58</td></tr>
<tr><td>6</td><td>BEARPAW</td><td>51</td><td>Salomon</td><td>53</td><td>BEARPAW</td><td>52</td><td>BEARPAW</td><td>65</td></tr>
<tr><td>7</td><td>Merrell</td><td>39</td><td>Ariat</td><td>50</td><td>Hunter Boots</td><td>46</td><td>SOREL</td><td>52</td></tr>
<tr><td>8</td><td rowspan="2">Cat Footwear/
SOREL</td><td rowspan="2">38</td><td>Black Diamond</td><td>49</td><td>Merrell</td><td>44</td><td>Muck Boots</td><td>51</td></tr>
<tr><td>9</td><td>Cat Footwear</td><td>48</td><td>Arc'teryx</td><td>41</td><td>Helly Hansen</td><td>47</td></tr>
<tr><td>10</td><td>Hunter Boots</td><td>37</td><td>SOREL</td><td>47</td><td>Cat Footwear</td><td>39</td><td>KEEN</td><td>46</td></tr>
</table>

Source: L.E.K. survey and analysis

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

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Timberland	100	Carhartt	100	Columbia	100	Carhartt	100
2	Carhartt	97	Timberland	95	Timberland	99	Timberland	98
3	Columbia	90	UGG	91	Carhartt	88	Columbia	84
4	Cat Footwear	64	Columbia	75	Cat Footwear	62	Ariat	72
5	UGG/ Ariat	60	Ariat	74	Merrell	55	Cat Footwear	69
6			Cat Footwear	72	Arc'teryx	48	SOREL	61
7	Merrell	50	L.L.Bean	38	Ariat	47	Merrell	58
8	L.L.Bean	47	Eddie Bauer	35	Salomon/ Mammut/ UGG	44	L.L.Bean	57
9	Arc'teryx	43	Salomon/ Red Wing Shoes	47			Black Diamond	51
10	Red Wing Shoes	42					Red Wing Shoes	47

Source: L.E.K. survey and analysis

Dress footwear

Key themes:

- The **top 10 brands in dress footwear are quite varied across genders**. Steve Madden appears on both lists, ranking No. 3 in women's and No. 5 in men's, but no other brands overlap across the two lists (see Figures 9 and 10).

- Despite limited brand overlap, **accessible luxury** appears to be a common theme in the category across both genders.

- Interestingly, relative to last year, **Gen Z appears more engaged with the category**, showing an awareness of, and a preference for, a broader range of brands.

Women's dress footwear — noteworthy moves:

- Coach again takes the No. 1 spot overall and this year has a full generational sweep.

- Michael Kors, Steve Madden, kate spade and Calvin Klein round out the top five overall, with Steve Madden performing differentially well among Gen Z and Michael Kors shining among millennials and Gen X.

- Schutz and Jeffrey Campbell dropped out of the top 10 overall, while Sam Edelman entered the top 10 overall, scoring particularly well with millennials.

- The viral brand VIVAIA, which got press from Oprah and Julia Roberts, hasn't broken into the top 10 overall but had a strong performance among Gen X, coming in at No. 4.

Men's dress footwear — noteworthy moves:

- The largest change has been the drop of industry leader Steve Madden from No. 1 to No. 5 overall compared to its 2024 ranking, driven by decidedly poor performance with Gen X.
- Tommy Hilfiger has therefore emerged in the top spot, with particular strength among Gen Z.
- HUGO BOSS and Ferragamo have fairly consistent performance across generations, while ALDO performs well among Gen Z and Cole Haan shines for Gen X.

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

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Coach	100	Coach	100	Michael Kors	100	Coach	100
2	Michael Kors	84	Steve Madden	95	Coach	99	Michael Kors	95
3	Steve Madden	79	Calvin Klein	91	kate spade	87	JustFab	91
4	kate spade	72	Michael Kors	75	Steve Madden/ Calvin Klein	76	VIVAIA	90
5	Calvin Klein	70	Vince Camuto	74			kate spade	88
6	GUESS	52	GUESS	72	GUESS	65	Steve Madden	80
7	Sam Edelman	51	kate spade	38	Sam Edelman	61	Vince	71
8	Kurt Geiger	48	Sarah Flint/ Betsey Johnson	64	Betsey Johnson	58	Dear Frances	70
9	Vince	45			Kurt Geiger	57	Kenneth Cole	68
10	Vince Camuto	44	Kurt Geiger	63	Larroudé	55	Vince Camuto	65

Source: L.E.K. survey and analysis

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

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Tommy Hilfiger	100	Tommy Hilfiger	100	HUGO BOSS	100	Cole Haan	100
2	HUGO BOSS/ Ferragamo	90	HUGO BOSS	79	Ferragamo	98	Ferragamo	81
3			Steve Madden	77	Tommy Hilfiger	96	Kenneth Cole/ HUGO BOSS	78
4	Cole Haan	79	Ferragamo	75	Cole Haan	91		
5	Steve Madden	72	ALDO	70	Steve Madden	65	Unlisted	77
6	Stacy Adams	61	Stacy Adams	65	Stacy Adams/ Johnston & Murphy	53	To Boot New York	76
7	Kenneth Cole	54	Bruno Magli	59			Tommy Hilfiger	74
8	ALDO	52	Kenneth Cole	54	Tod's	50	Beckett Simonon	72
9	To Boot New York/ Johnston & Murphy	46	Florsheim	48	Vince Camuto	48	Wolf & Shepherd	64
10			Cole Haan	47	Alden	48	Steve Madden	62

Source: L.E.K. survey and analysis

Apparel

Relative to footwear, apparel categories are showing a greater drop-off in brand heat after the top brand in a given category, suggesting clear winners followed by meaningful differences across generations. At the same time, the greater number of apparel brands overall means that there are more brands that consumers are excited about and spreading their wallets across.

Women show continued preference for athleisure and fast fashion brands, though the specific brands in favor continue to shift (e.g., Girlfriend Collective joined the athletic top 10 and Edikted replaced Princess Polly and Cider in casual clothing) (see Figure 11). Men, on the other hand, are drawn to work wear and athletic/technical apparel, suggesting a premium being placed on both form and function (see Figure 12). Similar to what we saw this year in footwear, dress apparel brands are gaining renewed traction, particularly among Gen Z, who are purchasing and engaging with this category more than they did last year. This suggests a reemergence of this category after pandemic declines.

Figure 11

Women's clothing

Brands ranked on a scale of 1-100

*NR=not ranked in prior year survey

Source: L.E.K. survey and analysis

Figure 12
Men's clothing
Brands ranked on a scale of 1-100

*NR=not ranked in prior year survey
Source: L.E.K. survey and analysis

Athletic clothing

Key themes:

- There is a decent amount of **consistency year over year in athletic clothing**, with nine out of the top 10 brands for each gender staying consistent with last year.
- Further, there is **increasing overlap in the leading brands across genders** — Nike comes in as the top brand in women's and men's athletic clothing, while seven of the top 10 brands overlap on both lists. Brands like lululemon, which started off serving women exclusively, and Vuori, which initially catered to men exclusively, now each design for both women and men. As a result, both brands are showing strength across genders (see Figures 13 and 14).

Women's athletic clothing — noteworthy moves:

- Nike, lululemon, Alo and adidas retained the top four spots from last year.
- However, the story gets a bit more interesting at the generational level. lululemon and Alo provide stiff competition to Nike among Gen Z, with lululemon taking the top spot and Alo coming in only three points behind Nike.
- While Vuori has long shown strength among older generations (and rose to the top spot in the Gen X rankings this year), it also climbed the chart to No. 4 among Gen Z.
- Girlfriend Collective is another gainer in the category, coming in at No. 8 overall and showing particular strength among younger generations, who appreciate the brand's reputation and style.

Men's athletic clothing — noteworthy moves:

- Nike remains the clear leader across all generations, followed somewhat distantly by adidas and Under Armour (which performs differentially well among Gen X).
- lululemon climbed to No. 4 overall, reflecting the brand's continued success as a dual-gender brand creating stylish, versatile and functional products for men.
- Vuori, on the other hand, has declined slightly since last year, dropping to No. 9 overall and falling out of the top 10 for millennials.
- Younger generations show relatively more appetite for direct-to-consumer (DTC) brands, with Gymshark, Vuori, Fabletics and Alo on their top 10 lists, while Gen X men continue to demonstrate a preference for legacy athletic brands (e.g., PUMA, Reebok, Champion).

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

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Nike	100	lululemon	100	Nike	100	Vuori	100
2	lululemon	93	Nike	88	adidas	78	Nike	96
3	Alo	76	Alo	85	lululemon	77	Under Armour	85
4	adidas	70	Gymshark	71	Under Armour	76	lululemon	80
5	Vuori	66	Vuori	67	Girlfriend Collective	65	Fabletics	75
6	Gymshark	65	adidas	62	Champion	62	adidas	69
7	Under Armour	64	Athleta	50	PUMA	60	Athleta	66
8	Girlfriend Collective	56	Fabletics/	47	Gymshark/	54	32 Degrees	65
9	Fabletics	51	Under Armour		RBX Active		Alo	63
10	Athleta	49	Girlfriend Collective	46	Alo	53	Beyond Yoga	59

Source: L.E.K. survey and analysis

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

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Nike	100	Nike	100	Nike	100	Nike	100
2	adidas	73	adidas	78	adidas	72	Under Armour	94
3	Under Armour	71	Under Armour	67	Under Armour	70	adidas	72
4	lululemon	55	Gymshark	59	lululemon	57	lululemon	62
5	Champion	45	lululemon	56	Fabletics	45	PUMA	53
6	PUMA	43	Champion	54	Champion	44	Reebok	51
7	Gymshark	42	Vuori	49	PUMA	42	Champion	48
8	Fabletics	35	PUMA	48	Alo	40	Vuori	46
9	Vuori	34	Fabletics	39	Echt/	33	O'Neill	36
10	Reebok	32	Reebok	36	Gymshark		32 Degrees	35

Source: L.E.K. survey and analysis

Casual clothing

Key themes:

- Casual clothing has **less overlap across genders** than some other categories (e.g., athletic), with only five brands appearing on both top 10 lists (see Figures 15 and 16).

- Top **women's casual clothing** brands indicate a **strong preference for fast fashion**, while **men's casual clothing** is once again **dominated by work wear players**.

Women's casual clothing — noteworthy moves:

- Leaders are consistent relative to last year, with SHEIN, SKIMS and Carhartt retaining their No. 1, No. 2 and No. 3 positions, respectively.

- While fast fashion shines overall, the brands that are top of mind for consumers continue to shift:

  - PrettyLittleThing and ZARA have risen in the rankings relative to last year and are now joined in the top 10 by Edikted, reflecting its growing popularity among social media-driven Gen Z.

  - At the same time, Fashion Nova and Princess Polly have fallen out of the top 10, though they remain strong with certain age cohorts.

Men's casual clothing — noteworthy moves:

- This category is once again dominated by work wear players, with Carhartt, Levi's, Dickies, Wrangler and Duluth Trading Co. all showing up in the top 10.

- Fast fashion brand SHEIN has dropped from No. 3 to No. 7 overall, with consumers directly commenting on the pending lawsuits and poor quality impacting its reputation.

- Further, several new brands entered the top 10 for the first time in 2025: ZARA rose from No. 19 in 2024 and True Religion rose from No. 14 in 2024.

- From a generational perspective, streetwear brands like Kith and Supreme appear to have strength with millennials, while Gen X prefers more traditional-styled brands like Southern Tide and UNTUCKit.

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>Carhartt</td><td>86</td><td>SHEIN</td><td>99</td><td>Carhartt</td><td>79</td><td>Carhartt</td><td>97</td></tr>
<tr><td>3</td><td>SKIMS</td><td>83</td><td rowspan="2">UNIQLO/
Carhartt</td><td rowspan="2">89</td><td>PrettyLittleThing</td><td>77</td><td>EVEREVE</td><td>80</td></tr>
<tr><td>4</td><td>PrettyLittleThing</td><td>78</td><td>Levi's</td><td>76</td><td>SKIMS</td><td>78</td></tr>
<tr><td>5</td><td>Levi's</td><td>72</td><td>Aritzia</td><td>87</td><td>Fashion Nova</td><td>72</td><td>PAIGE</td><td>75</td></tr>
<tr><td>6</td><td rowspan="2">Aritzia/
Edikted</td><td rowspan="2">66</td><td>Edikted</td><td>86</td><td>Superdry</td><td>68</td><td rowspan="2">Old Navy/
SPANX</td><td rowspan="2">73</td></tr>
<tr><td>7</td><td>PrettyLittleThing</td><td>81</td><td>SKIMS</td><td>62</td></tr>
<tr><td>8</td><td rowspan="2">ZARA/
UNIQLO</td><td rowspan="2">64</td><td>True Religion</td><td>79</td><td rowspan="3">Lucky Brand/
Free People/
Old Navy</td><td rowspan="3">59</td><td rowspan="2">Levi's/
Joe's Jeans</td><td rowspan="2">72</td></tr>
<tr><td>9</td><td rowspan="2">Levi's/
Princess Polly</td><td rowspan="2">74</td></tr>
<tr><td>10</td><td>Fashion Nova</td><td>62</td><td>ZARA</td><td>71</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>Levi's</td><td>100</td><td>Carhartt</td><td>100</td></tr>
<tr><td>2</td><td>Levi's</td><td>89</td><td>True Religion</td><td>78</td><td>Carhartt</td><td>97</td><td>Levi's</td><td>95</td></tr>
<tr><td>3</td><td rowspan="2">UNIQLO/
Polo Ralph Lauren</td><td rowspan="2">66</td><td>UNIQLO</td><td>75</td><td>Polo Ralph Lauren</td><td>80</td><td>Dickies</td><td>77</td></tr>
<tr><td>4</td><td>Levi's</td><td>73</td><td>UNIQLO</td><td>78</td><td>Duluth Trading Co.</td><td>72</td></tr>
<tr><td>5</td><td>Dickies</td><td>61</td><td>Polo Ralph Lauren</td><td>66</td><td>Kith</td><td>75</td><td>Wrangler</td><td>68</td></tr>
<tr><td>6</td><td>Wrangler</td><td>60</td><td>SHEIN</td><td>63</td><td>ZARA</td><td>74</td><td>Topman</td><td>67</td></tr>
<tr><td>7</td><td>SHEIN</td><td>59</td><td rowspan="3">G-Star RAW/
ZARA/
Wrangler</td><td rowspan="3">58</td><td rowspan="2">Dickies/
Supreme</td><td rowspan="2">70</td><td>Southern Tide</td><td>65</td></tr>
<tr><td>8</td><td>True Religion</td><td>56</td><td>UNTUCKit</td><td>64</td></tr>
<tr><td>9</td><td>ZARA</td><td>54</td><td>Wrangler</td><td>66</td><td rowspan="2">Polo Ralph Lauren/
Dockers</td><td rowspan="2">58</td></tr>
<tr><td>10</td><td>Duluth Trading Co.</td><td>51</td><td>Tommy Hilfiger</td><td>53</td><td>SHEIN</td><td>63</td></tr>
</table>

Source: L.E.K. survey and analysis

Outdoor/rugged clothing

Key themes:

- Once again, **industry stalwart brands** The North Face, Columbia and Patagonia **take the top three spots** for both women's and men's outdoor/rugged apparel and across two of three generations, highlighting their broad appeal. Notably, however, Patagonia has slipped to No. 3 (see Figures 17 and 18).

- Interestingly, outdoor/rugged apparel has had **higher turnover in the top 10 year over year**, with three to four new brands on the overall list for each gender.

Women's outdoor/rugged clothing — noteworthy moves:

- The North Face retains its No. 1 spot across all generations, continuing to lead with its strong brand reputation and style.

- After the top tier of The North Face, Columbia and Patagonia, however, there is meaningful movement, suggesting that consumers are looking for new inspiration:

    - Ariat and Cotopaxi are two notable climbers, rising to No. 3 (tied with Patagonia) and No. 5 overall, respectively, with Ariat in particular achieving solid performance across generations.

    - Canada Goose replaces other premium outerwear players (Mackage and Moose Knuckles) on the top 10 list, while emerging brand AETHER and European player Norrøna enter the top 10 for the first time.

Men's outdoor/rugged clothing — noteworthy moves:

- For men, The North Face, Columbia and Patagonia are again at the top and nearly across the board.

- Canada Goose and Arc'Teryx come in at No. 5 and No. 6, respectively, with particular strength among Gen Z.

- More activity-specific brands like Ariat and Huk round out the top 10 and tend to perform differentially well with older generations.

- The relative consistency of brands across generations within men's outdoor/rugged clothing suggests a fairly similar set of needs and a focus on technical product across cohorts.

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

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	The North Face	100	The North Face	100	The North Face	100	The North Face	100
2	Columbia	72	Ariat	77	Columbia	77	Columbia	80
3	Ariat/	67	Columbia	76	Patagonia	74	Ariat	74
4	Patagonia		Patagonia	76	Ariat	66	Patagonia	67
5	Cotopaxi	48	Cotopaxi	61	icebreaker	60	Fjällräven	49
6	Canada Goose	41	Mountain Hardwear	56	Cotopaxi	59	Salomon	43
7	icebreaker	34	Free Fly	55	Smartwool	57	Canada Goose	43
8	AETHER/	28	Canada Goose	53	Fjällräven	56	Osprey	42
9	Norrøna		L.L.Bean	50	AETHER	55	L.L.Bean	41
10	L.L.Bean	27	Moose Knuckles	47	Canada Goose	53	Helly Hansen	40

Source: L.E.K. survey and analysis

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

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	The North Face	100	The North Face	100	The North Face	100	The North Face	100
2	Columbia	74	Columbia	76	Patagonia	79	Columbia	80
3	Patagonia	70	Canada Goose	72	Columbia	75	Patagonia	77
4	Oakley	61	Arc'teryx	69	Oakley	62	Huk	67
5	Canada Goose	57	Oakley	68	Canada Goose	53	Oakley	66
6	Arc'teryx	51	Patagonia	64	Arc'teryx	44	Ariat	60
7	Ariat	44	Sherpa	53	Ariat	40	L.L.Bean	58
8	L.L.Bean	43	L.L.Bean	52	L.L.Bean	39	Arc'teryx	55
9	Huk	38	Ariat	51	Fjällräven	38	Canada Goose	54
10	Eddie Bauer	32	Eddie Bauer	50	Huk	36	Mountain Hardwear	50

Source: L.E.K. survey and analysis

Dress clothing

Key themes:

- Dress clothing rankings reflect a continued preference for **timeless, high-quality brands**.

- The heat scores and range of brands included among women's rankings suggest **greater engagement with the category for women** than for men (see Figures 19 and 20).

Women's dress clothing — noteworthy moves:

- Michael Kors and Calvin Klein take the top two spots overall, with differential strength in Gen X/millennials and Gen Z, respectively.

- These brands overcame the sustainable brand Reformation, which slipped to No. 4 overall, despite its continued strength with millennials.

- Lulus dropped from No. 4 to No. 9 overall, only remaining on the generational list for Gen Z.

- Special occasion brands Retrofête and Katie May were top gainers, coming in at No. 6 and No. 7 overall, respectively, given their strength with millennials and Gen Z, respectively.

Men's dress clothing — noteworthy moves:

- The men's dress clothing category is led by Calvin Klein and Polo Ralph Lauren, securing No. 1 and No. 2, respectively, across generations.

- The next tier comprises a range of other large fashion labels — Tommy Hilfiger, Michael Kors, HUGO BOSS and Emporio Armani. However, brand heat scores for this tier fall off fairly quickly, suggesting an opportunity to drive greater consumer excitement about the category.

- Ted Baker, Theory and Perry Ellis dropped out of the top 10, while Brooks Brothers, Banana Republic and J.Crew moved into the top 10 overall, suggesting a continued need for dress apparel with relevant but mainstream style at a reasonable price point.

- On the other hand, DTC brands like Suitsupply, Bonobos and others have fallen completely off the list this year.

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

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Michael Kors	100	Calvin Klein	100	Michael Kors	100	Michael Kors	100
2	Calvin Klein	93	kate spade	90	Reformation	81	kate spade	90
3	kate spade	89	Katie May	88	Calvin Klein	76	Calvin Klein	73
4	Reformation	77	Michael Kors	86	Polo Ralph Lauren	74	Kenneth Cole	67
5	Polo Ralph Lauren	76	Polo Ralph Lauren	84	Retrofête	73	Vince Camuto/ Theory	64
6	Retrofête	74	Eliza J	83	kate spade	69		
7	Katie May	66	Lulus	81	Tadashi Shoji	62	LK Bennett	61
8	Theory	60	BCBGMAXAZRIA	80	Theory	58	Alice + Olivia/ Saved by the Dress	60
9	Lulus	58	Reformation	79	GANNI	51		
10	Vince Camuto	52	Susana Monaco	76	Katie May	43	Polo Ralph Lauren	59

Source: L.E.K. survey and analysis

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

	Total	Score	Gen Z	Score	Millennial	Score	Gen X	Score
1	Calvin Klein	100	Calvin Klein	100	Polo Ralph Lauren	100	Calvin Klein	100
2	Polo Ralph Lauren	94	Polo Ralph Lauren	85	Calvin Klein	90	Polo Ralph Lauren	92
3	Tommy Hilfiger	71	Tommy Hilfiger	82	Tommy Hilfiger	65	Michael Kors	71
4	Michael Kors	65	Michael Kors	66	Emporio Armani	64	Emporio Armani	64
5	HUGO BOSS	56	HUGO BOSS	59	Michael Kors/ HUGO BOSS	62	HUGO BOSS	60
6	Emporio Armani	54	Emporio Armani	47			Kenneth Cole	59
7	Brooks Brothers	37	Banana Republic	38	J.Crew	47	Tommy Hilfiger	58
8	Banana Republic	35	Reiss	37	Brooks Brothers	44	Brooks Brothers	57
9	J.Crew	34	Club Room	36	Banana Republic	43	Marc New York	49
10	Kenneth Cole	32	Theory	34	Bonobos	36	Perry Ellis	48

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.

Further, the continued churn of brands among the top 10 in key categories and the increasing competition from emerging brands to legacy leaders make this targeted consumer understanding critical.

We tested roughly 450 different brands across categories to understand their popularity and key drivers behind 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.

For more information, please contact us.

Endnote

[1]Previous versions of the survey called the category "outdoor"; we changed it to "outdoor/rugged" in 2024.

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Jon Weber is a Managing Director and Partner in L.E.K. Consulting's Boston office and serves on the firm's Global Leadership Team. Jon advises clients on many strategic issues, including growth strategy, digital and channel strategy, pricing and promotions, customer experience and engagement, consumer insights and brand position, merchandising and service offering development, performance improvement, and M&A.

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