

# US Athletic Shoe Market

-Trends, Challenges and Opportunities 2008

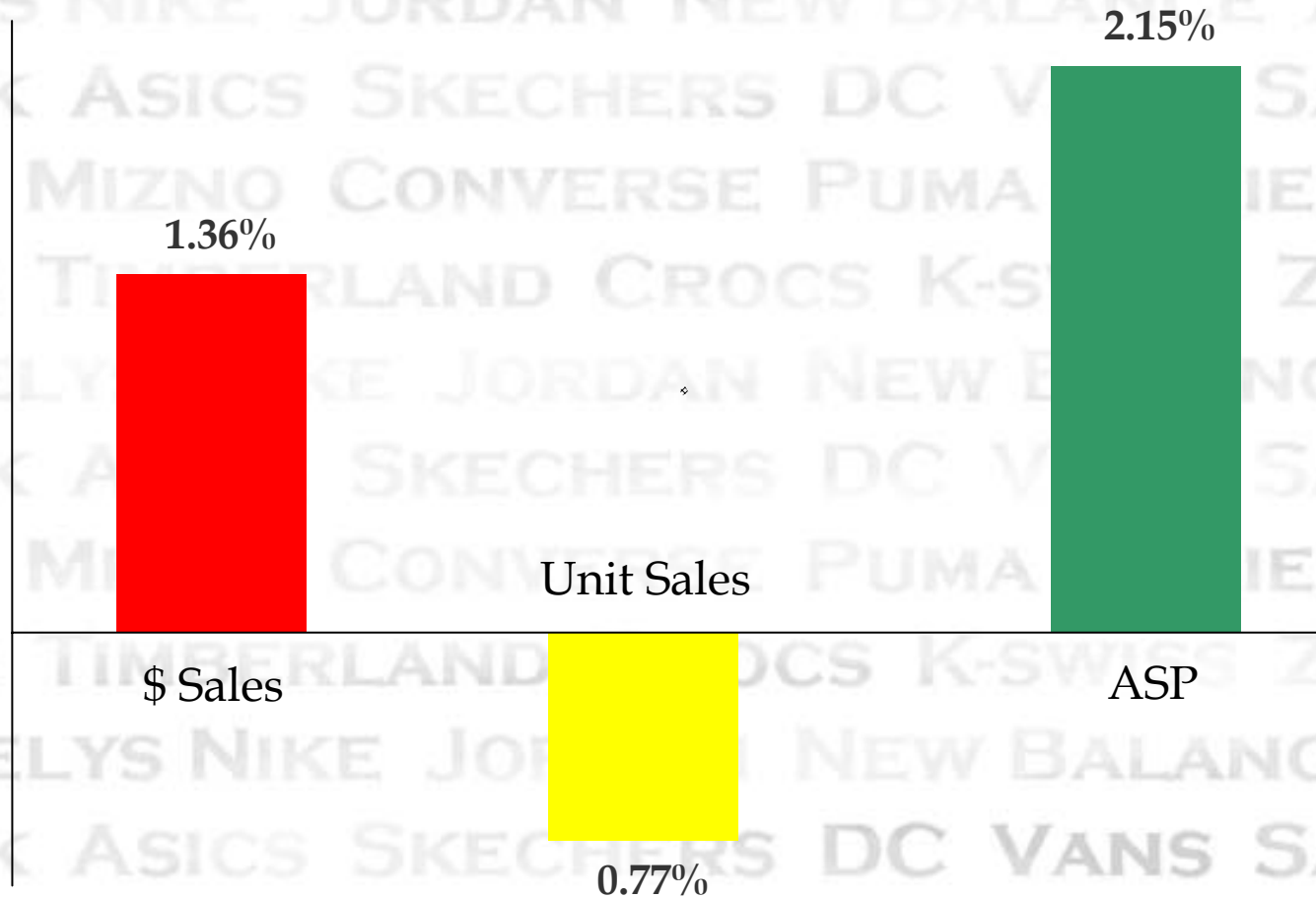


By **Matt Powell**  
Analyst, SportsONESource Group

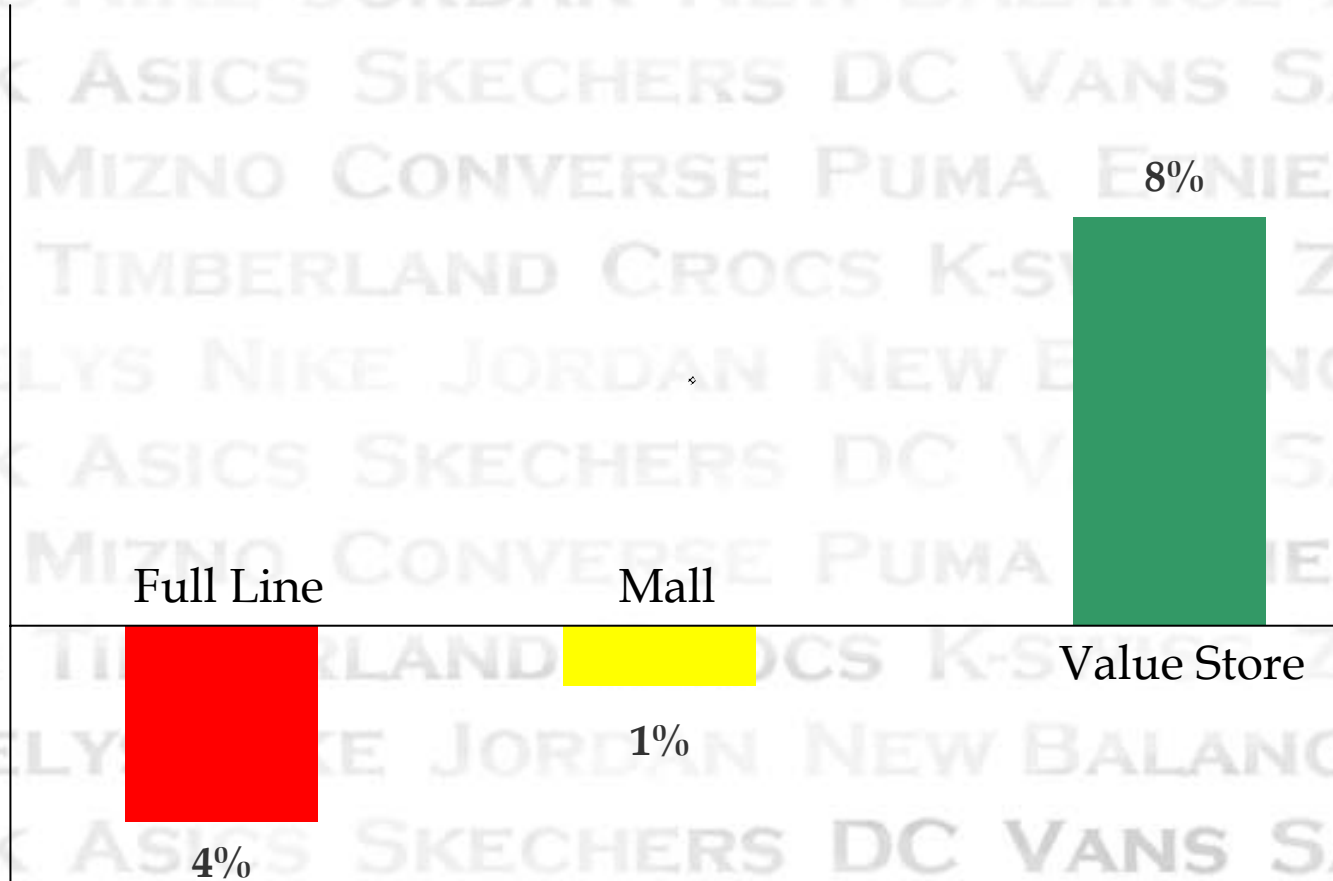
# Matt Powell

- 1991년부터 스포츠산업에 몸담아왔으며
- Sportmart, Sneaker Stadium, Modell' s 그리고 MVP.com 등에서 선임 MD를 역임
- 스포츠화 산업의 리처치와 분석을 제공하는 Princeton Retail Analysis 의 멤버
- 2002년 SportsONESource 공동설립
- 2003년 SportsONESource는 현재 가장 널리 읽히는 스포츠 산업 매거진 Sports Executive Weekly 런칭
- 2006년 SportsONESource는 산업 POS데이터와 분석을 제공하는 SportScanINFO 인수
- 2007년 Sporting Goods Business magazine 및 관련 타이틀 인수

# 2008 Year to Date Sales Results



# Year to Date Trend by Channel

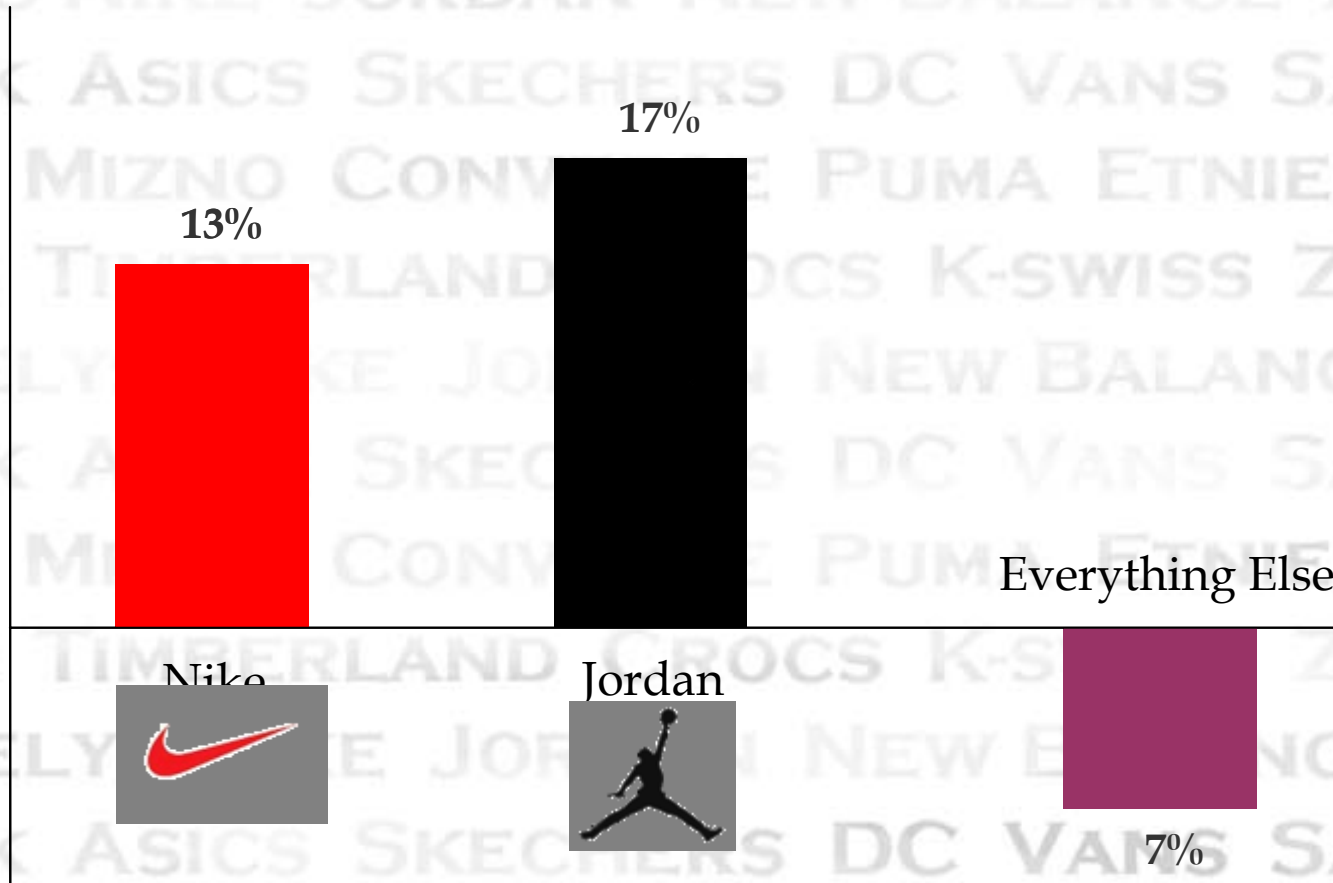




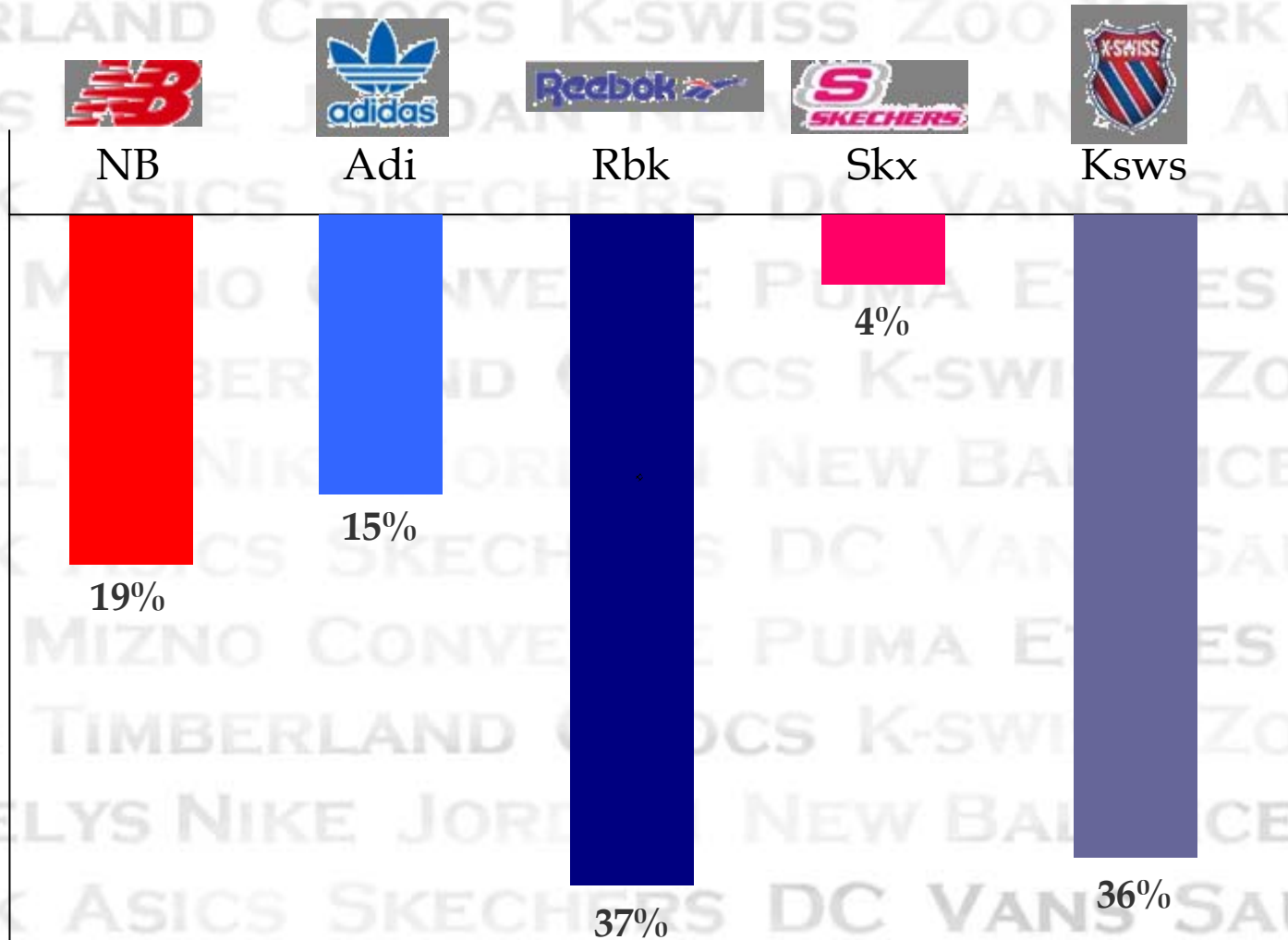
# Year to Date Trend by Brand



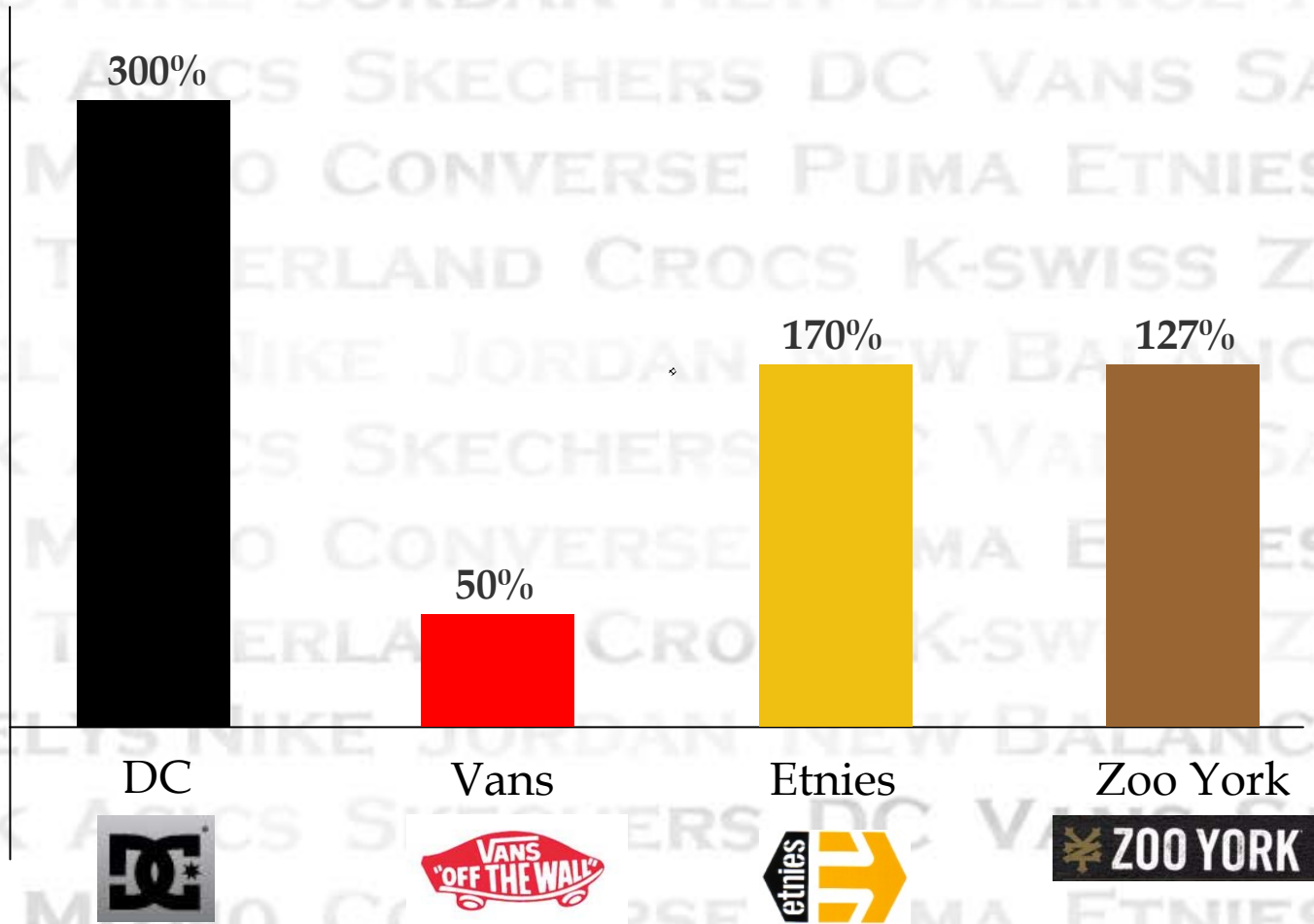
# Year to Date Trend by Brand



# Year to Date Trend by Brand

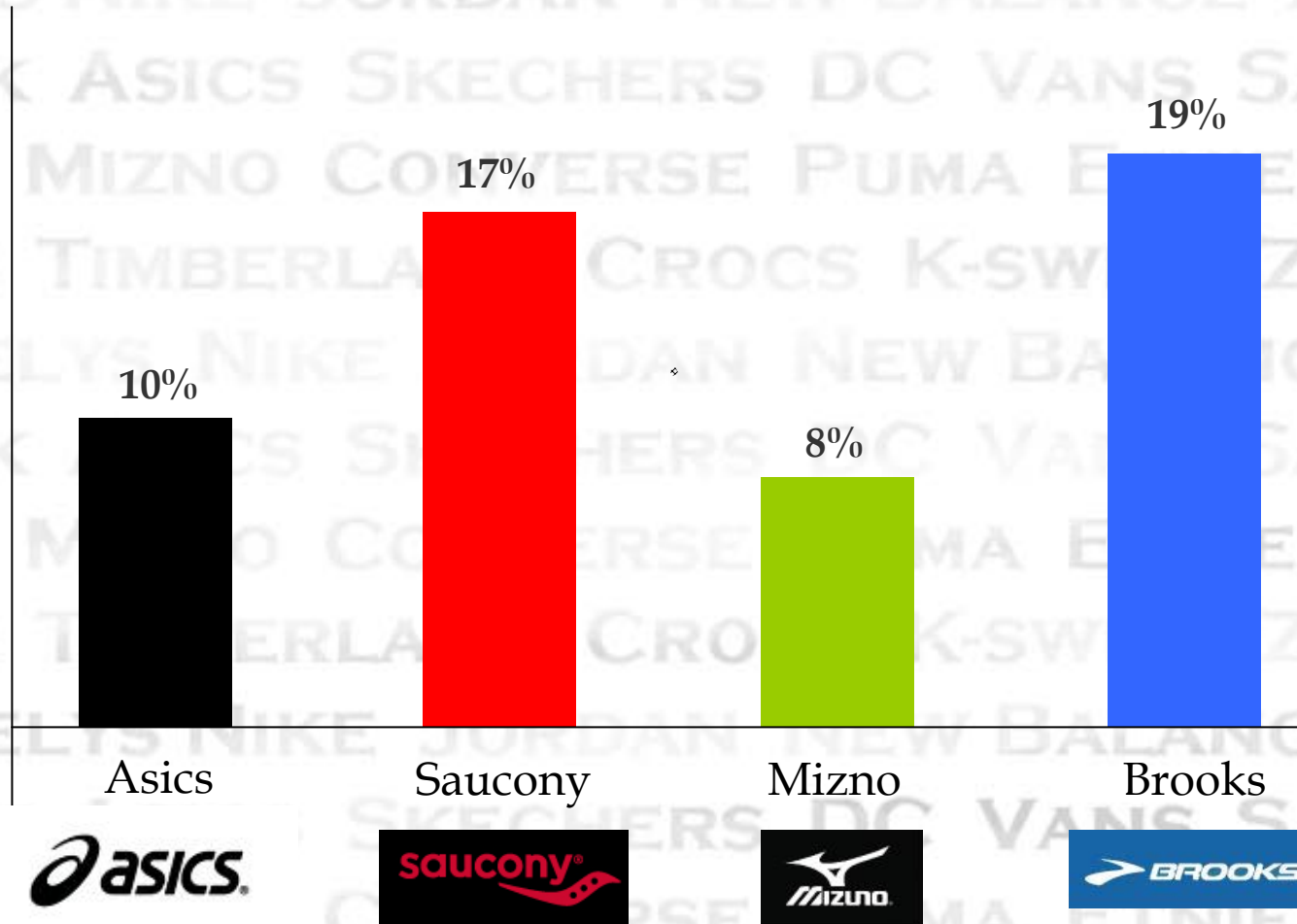


# Year to Date Trend by Brand

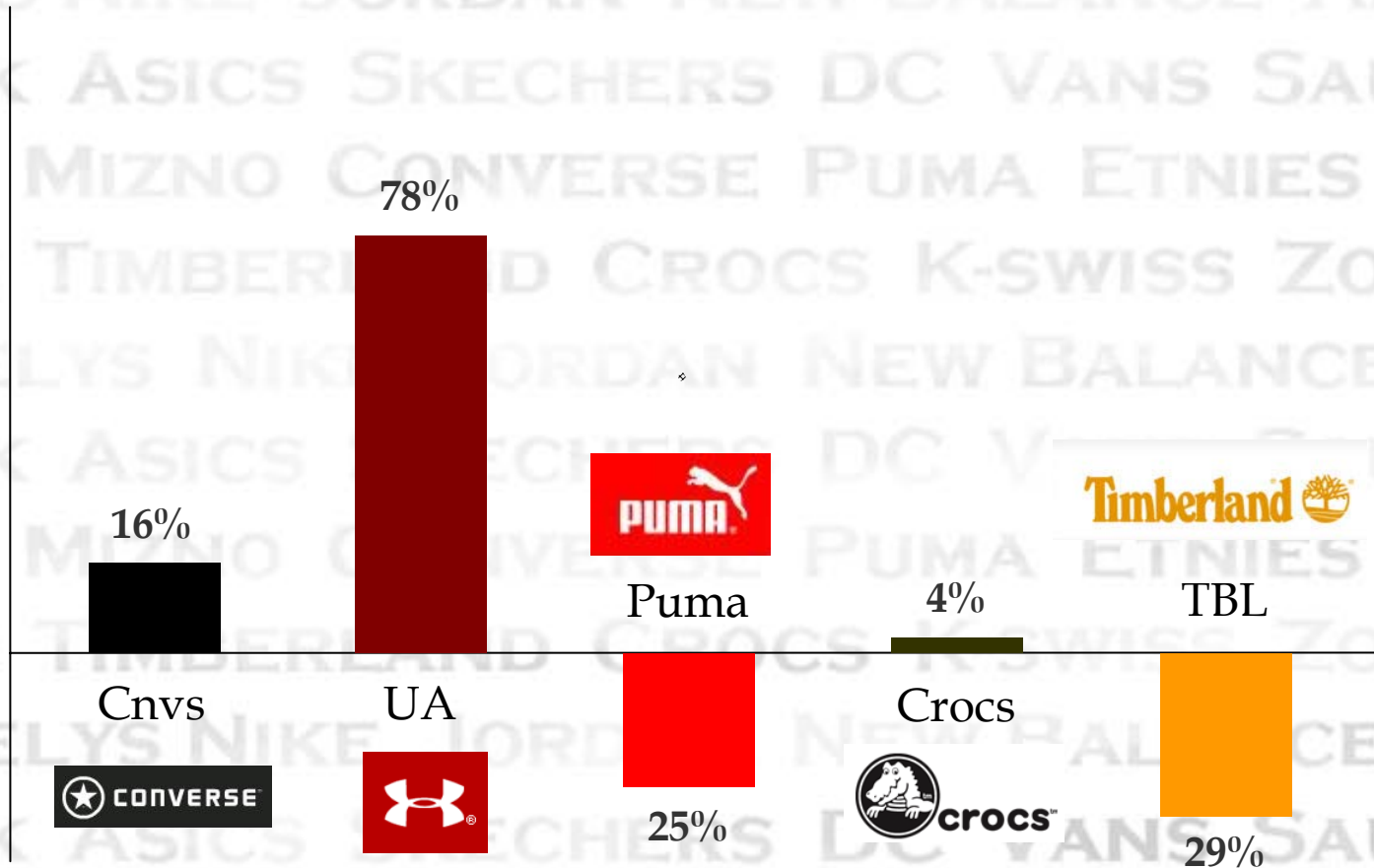




# Year to Date Trend by Brand

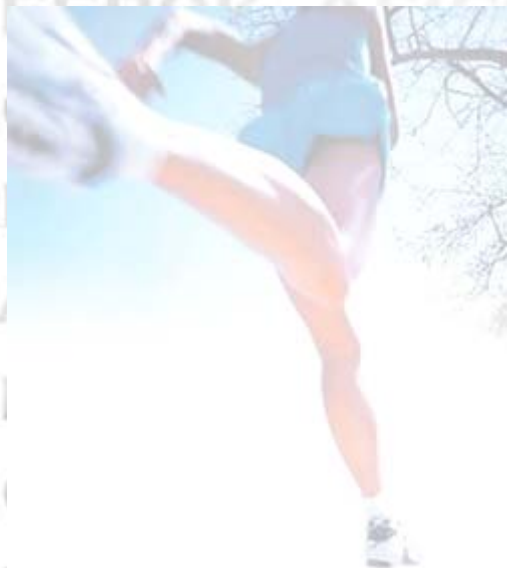


# Year to Date Trend by Brand

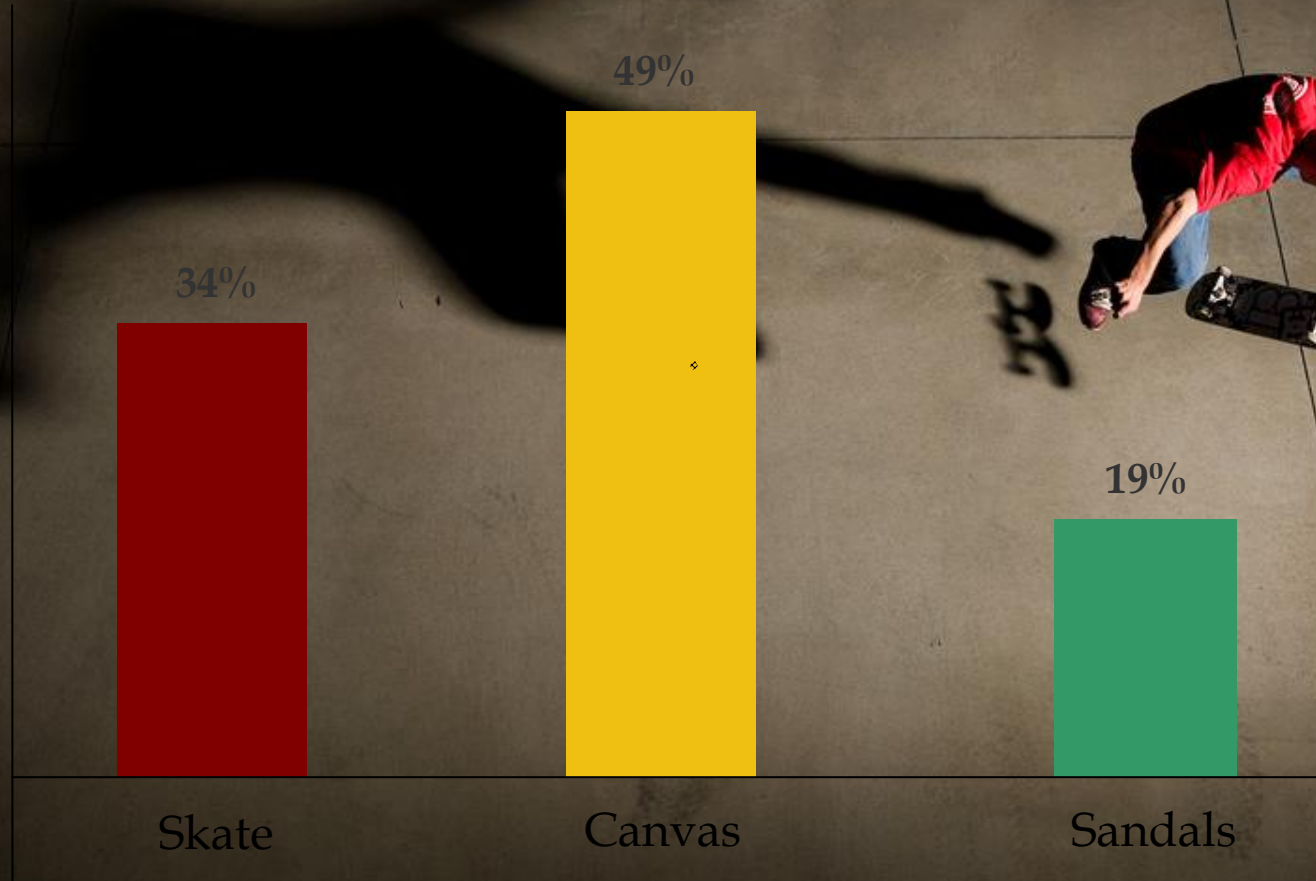




# Year to Date Trend by Category

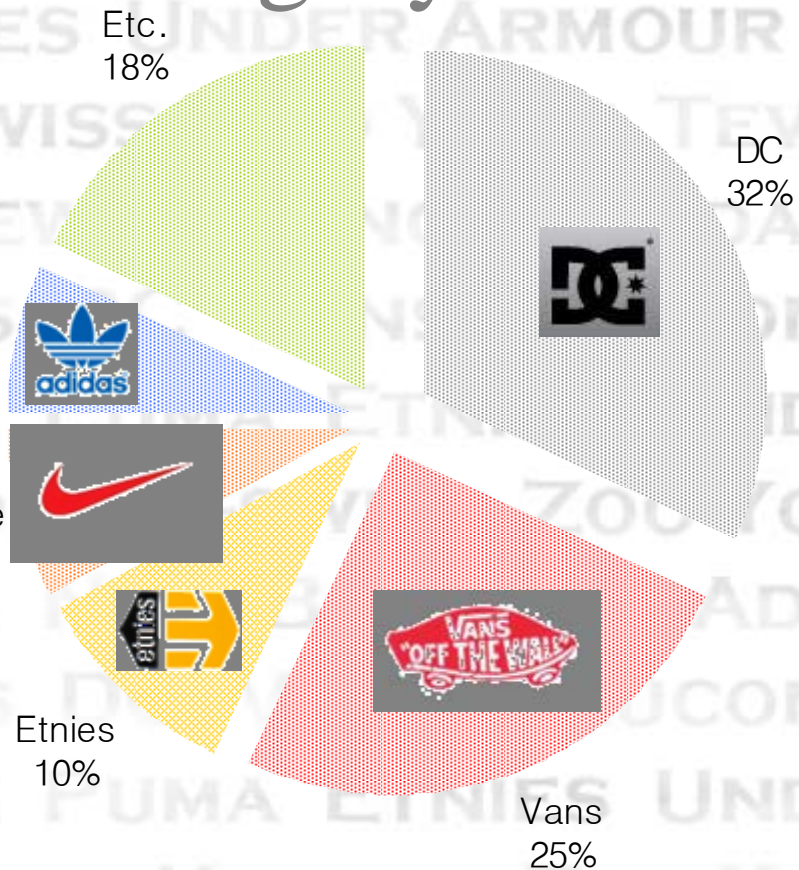
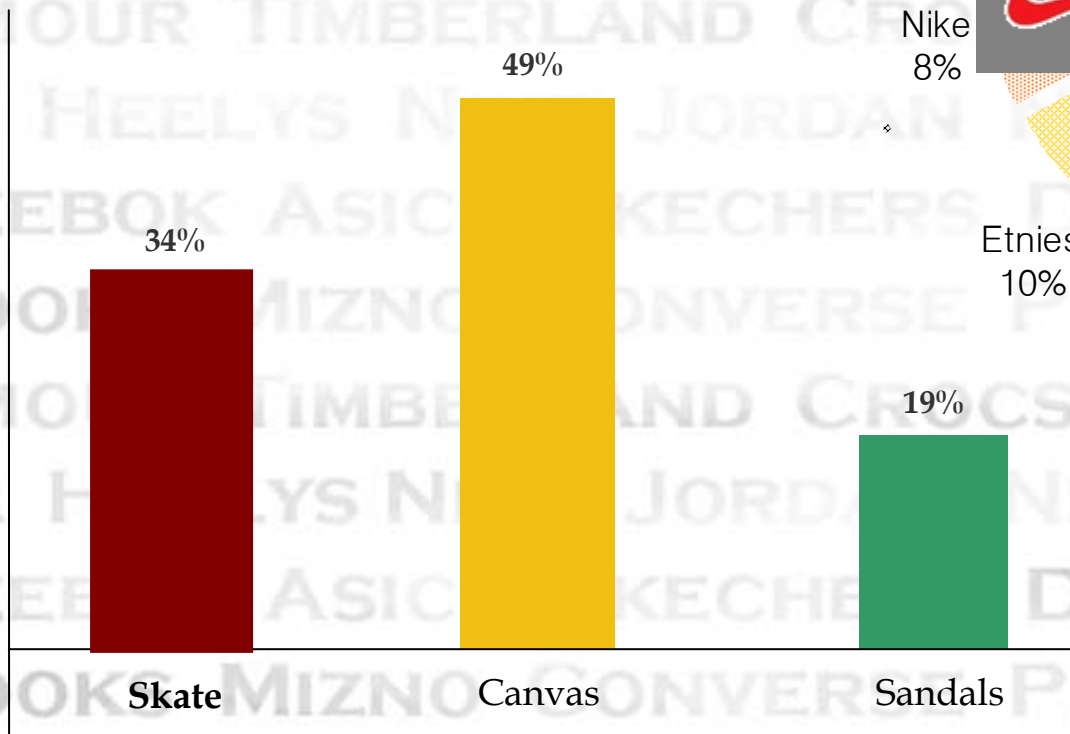


# Year to Date Trend by Category



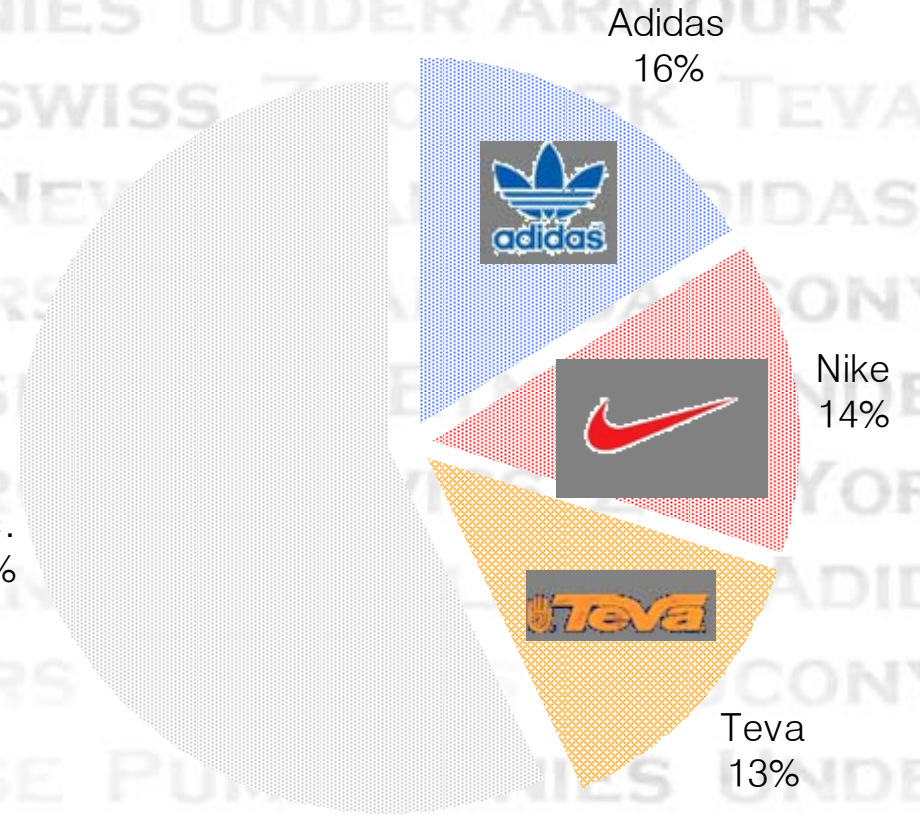
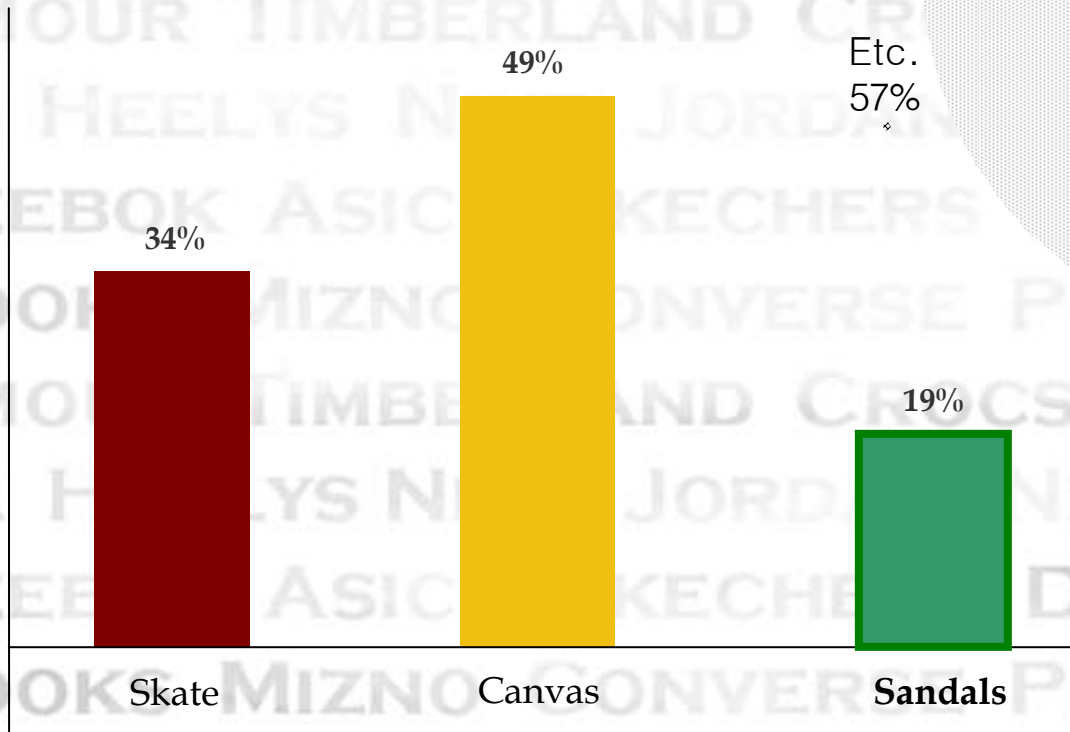
# Year to Date Trend by Category

## Skate



# Year to Date Trend by Category

## Sandals

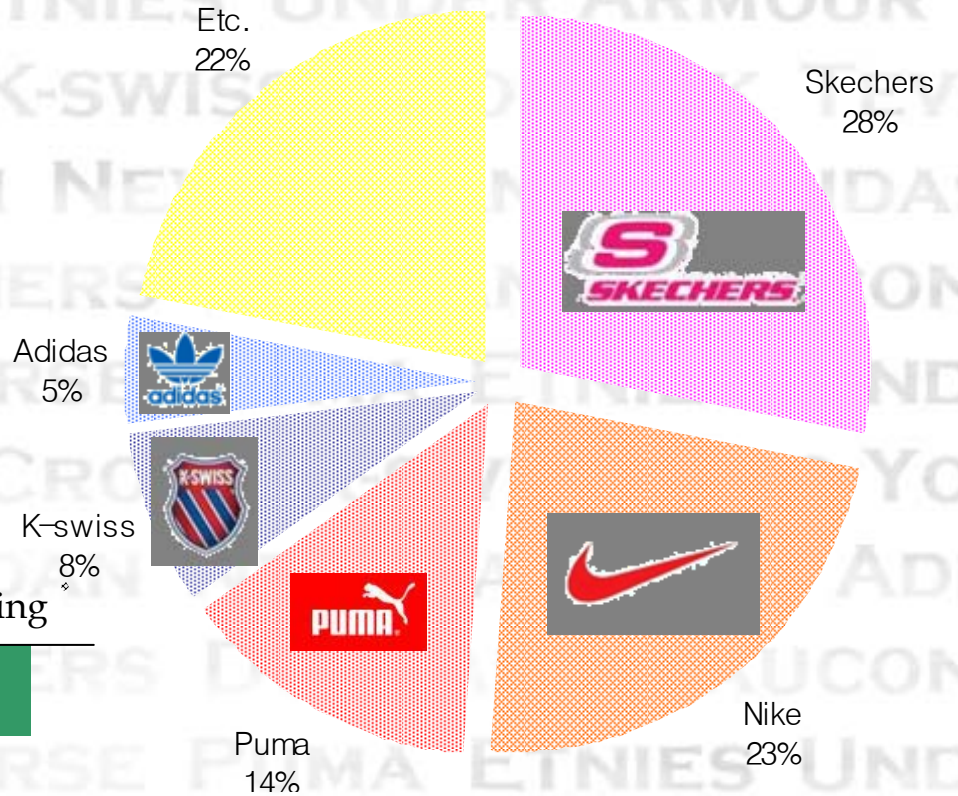
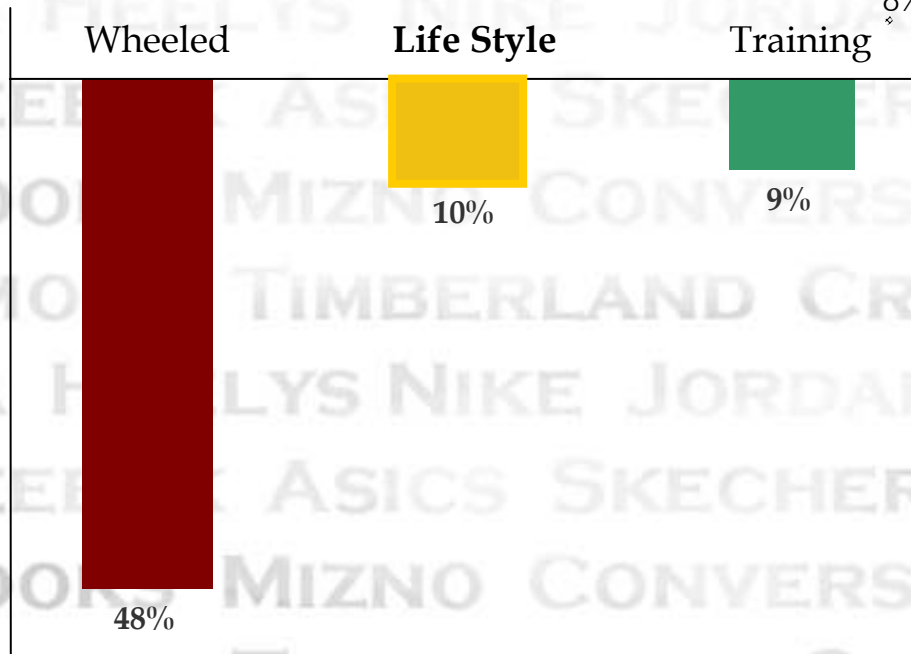


# Year to Date Trend by Category



# Year to Date Trend by Category

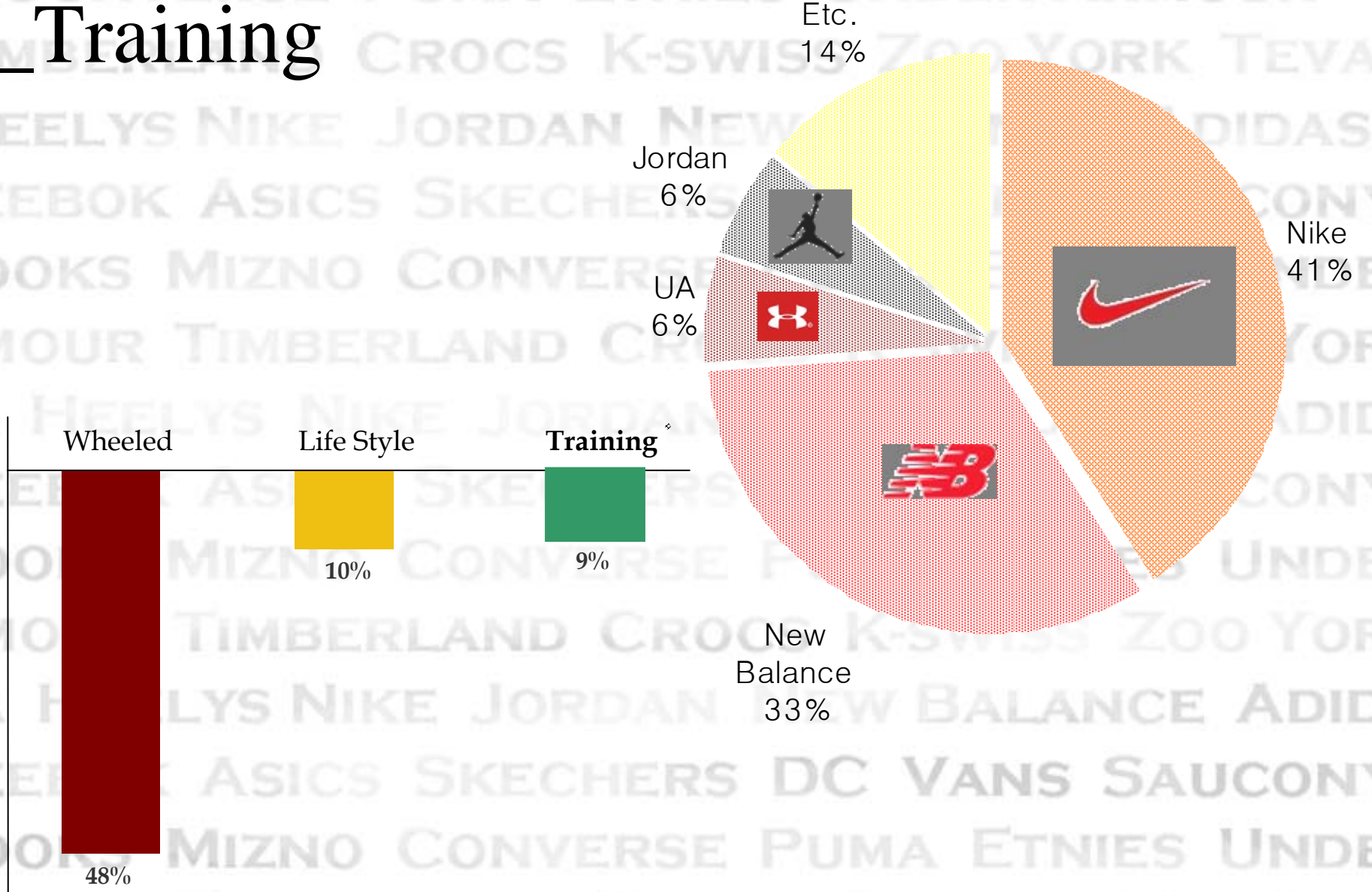
## Life Style





# Year to Date Trend by Category

## Training



# Year to Date Trend by Category

## \_Basket Ball



All

Performance

6%

1%

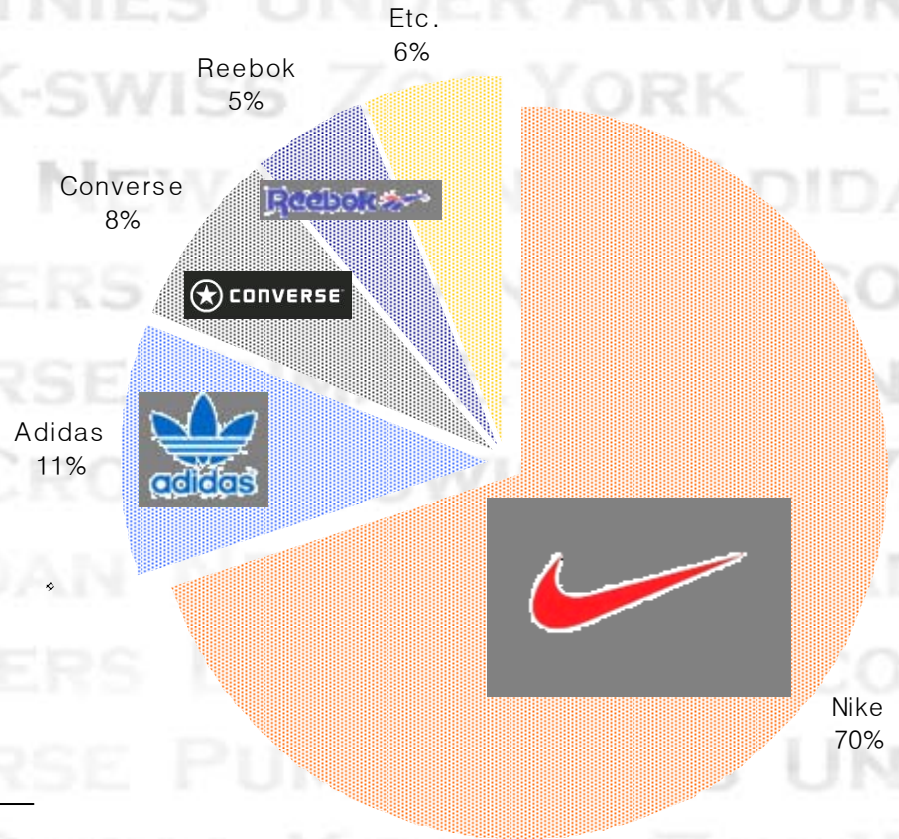
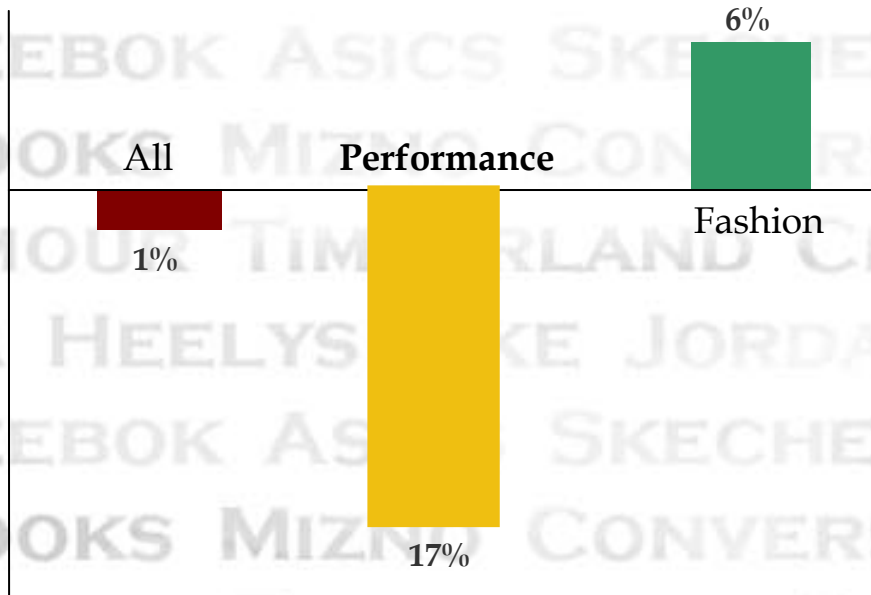
17%

Fashion



# Year to Date Trend by Category

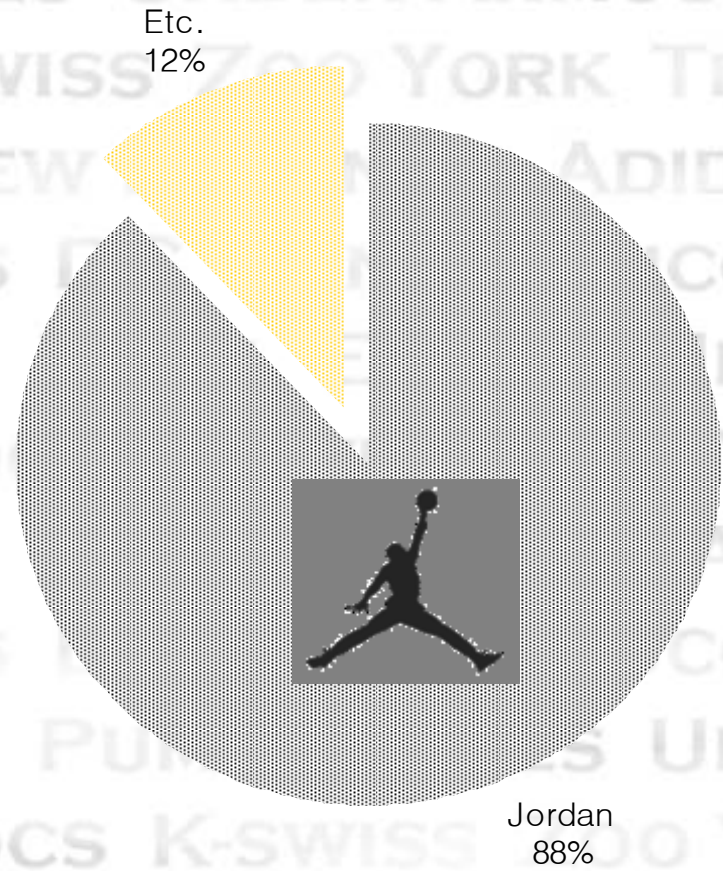
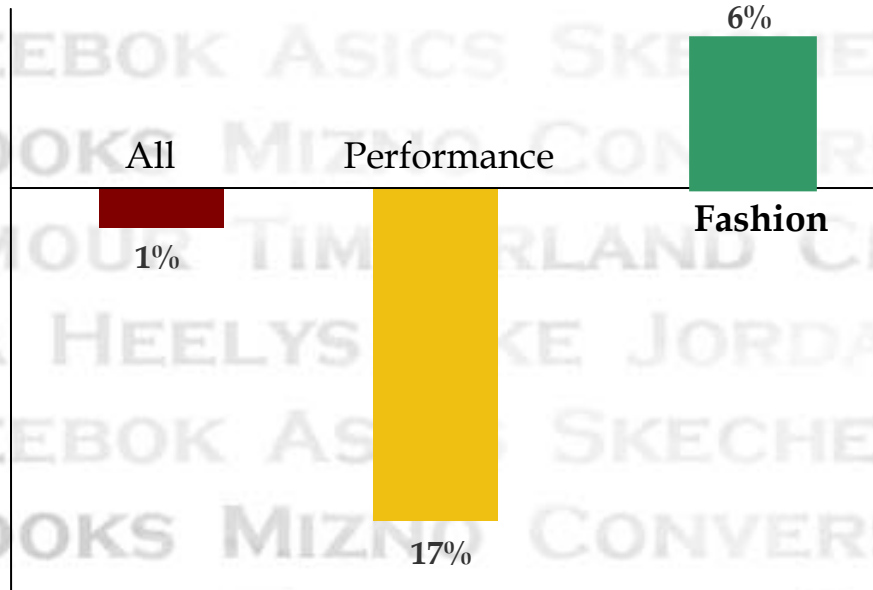
## Basket Ball Performance



# Year to Date Trend by Category

## Basket Ball

## Fashion



# Year to Date Trend by Category

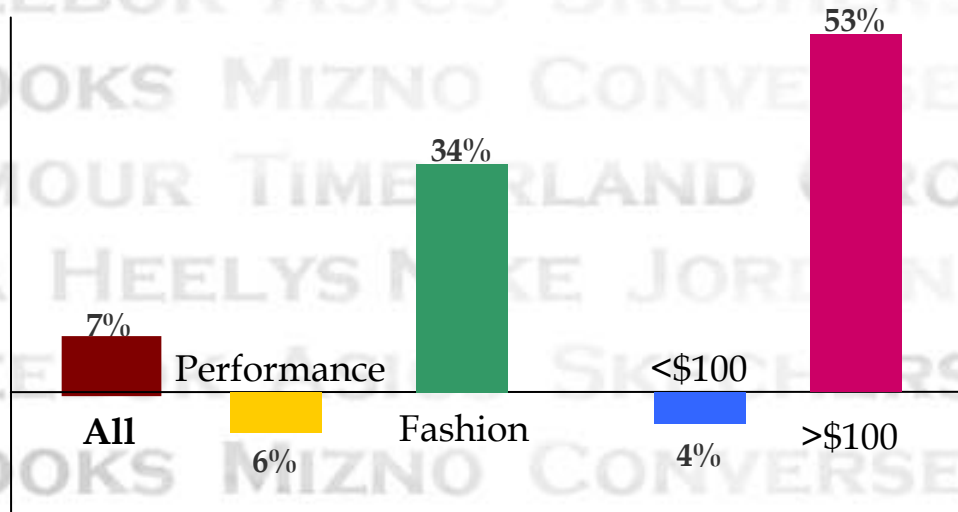
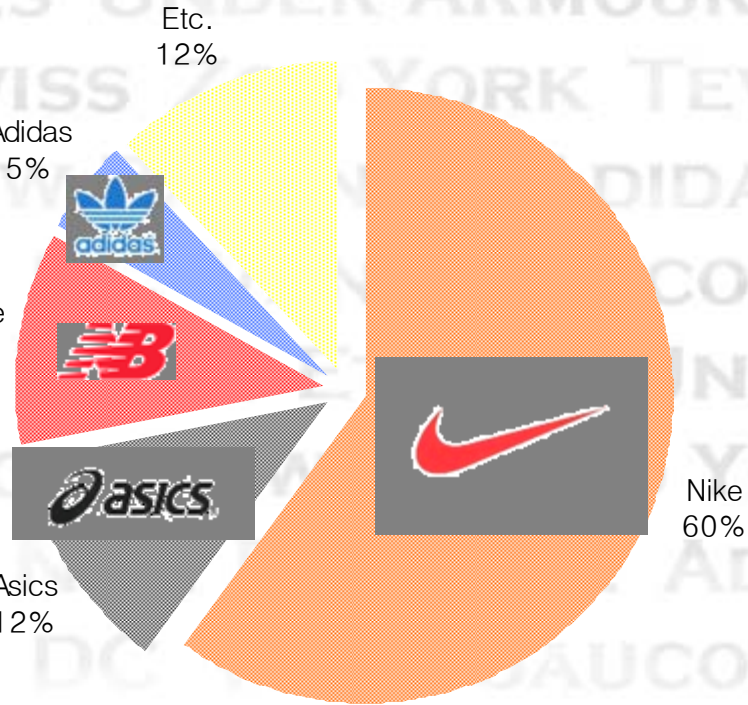
## Running



# Year to Date Trend by Category

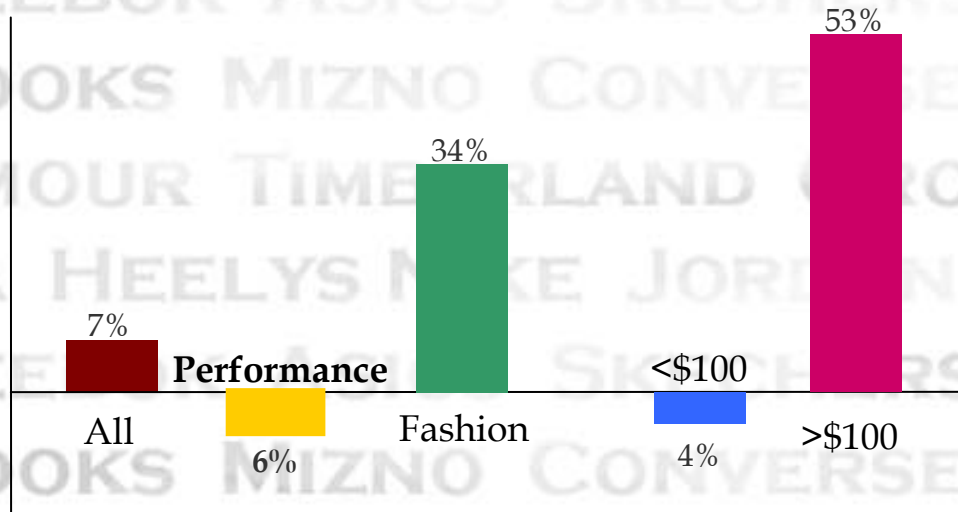
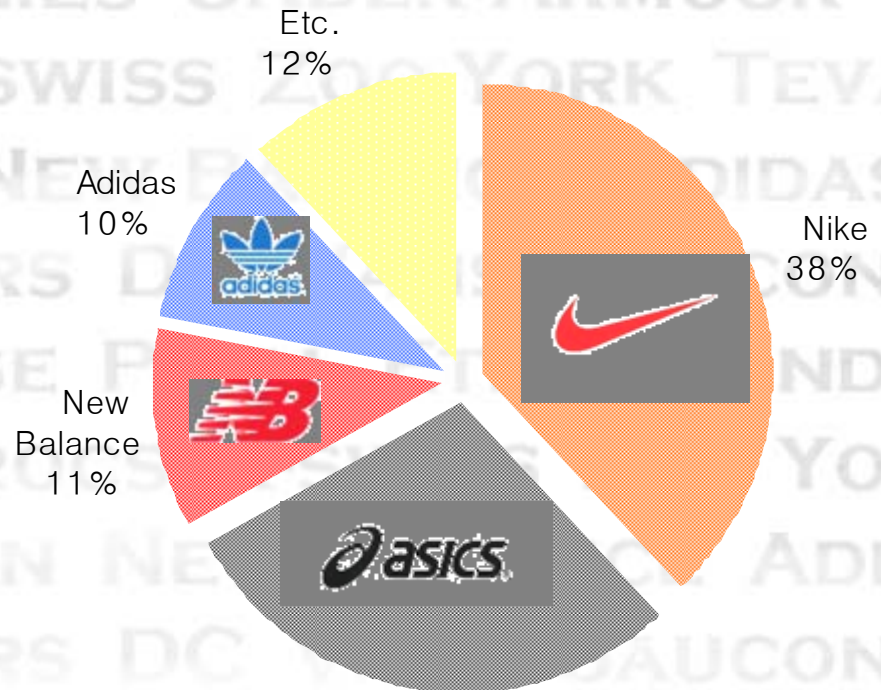
## Running

### All



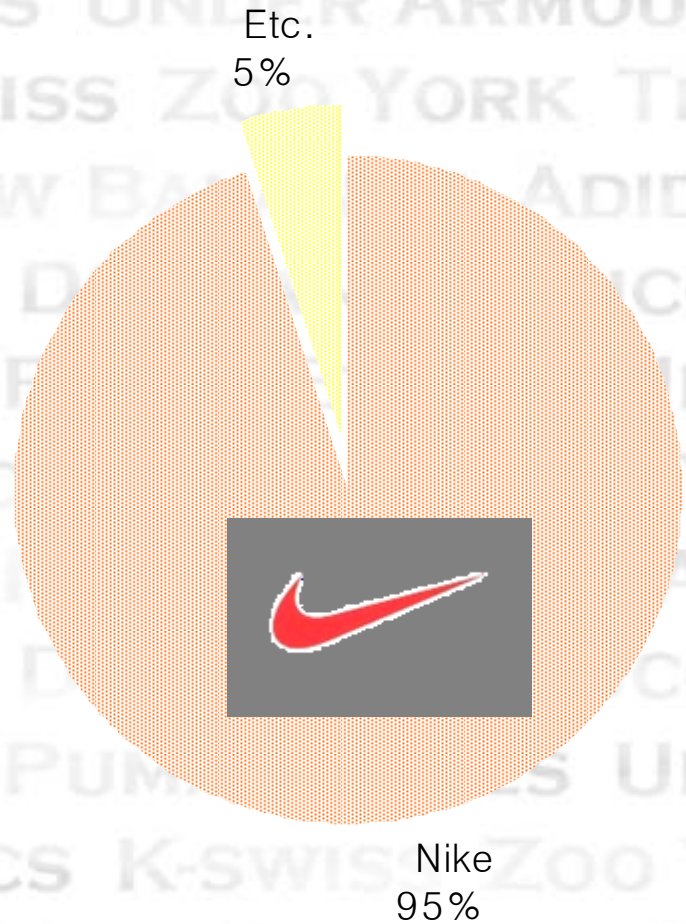
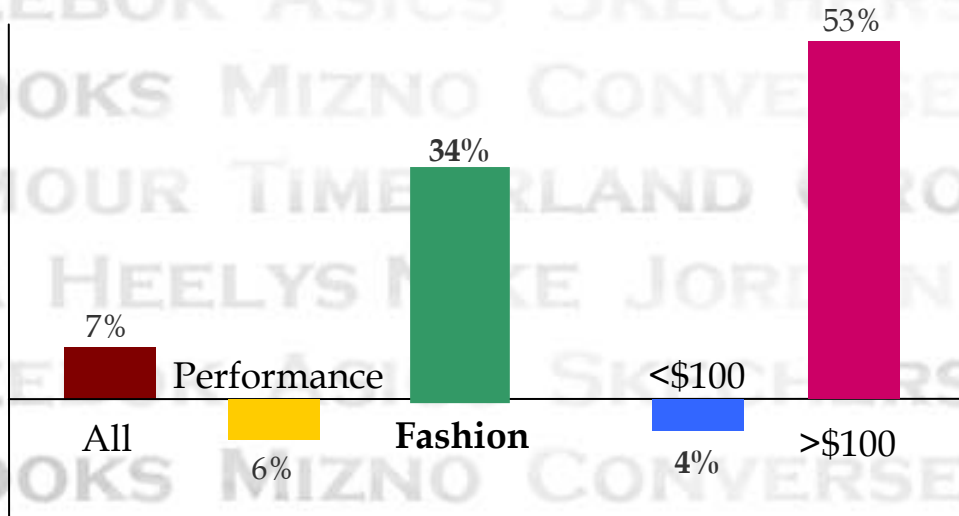
# Year to Date Trend by Category

## Running Performance



# Year to Date Trend by Category

Running  
Fashion

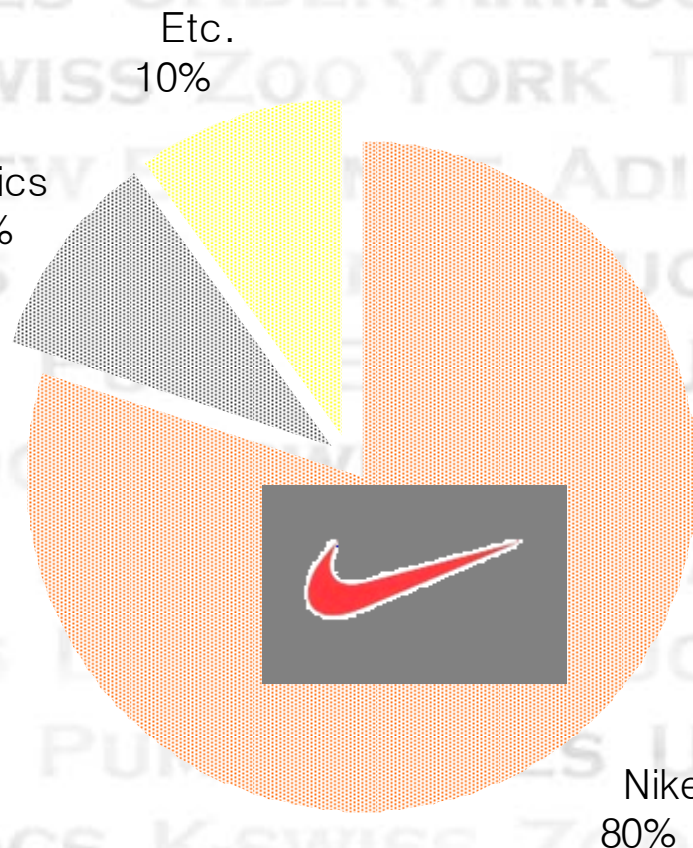
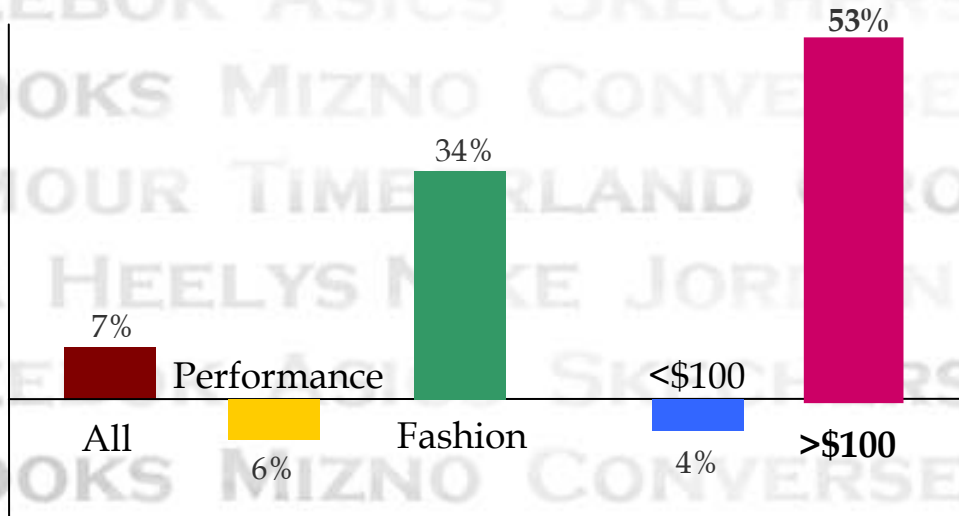




# Year to Date Trend by Category

## Running

>\$100

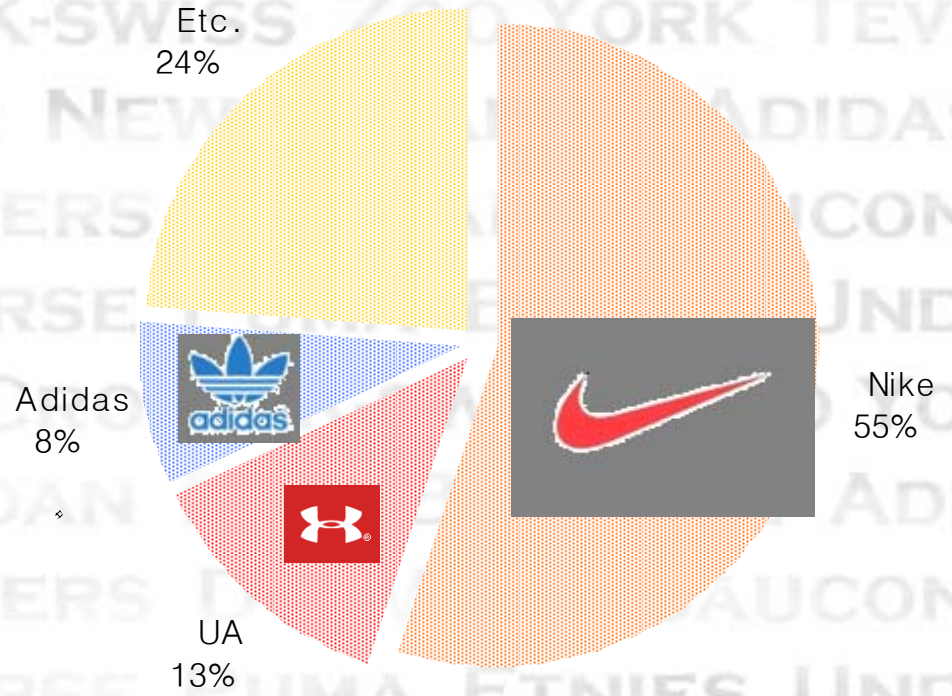
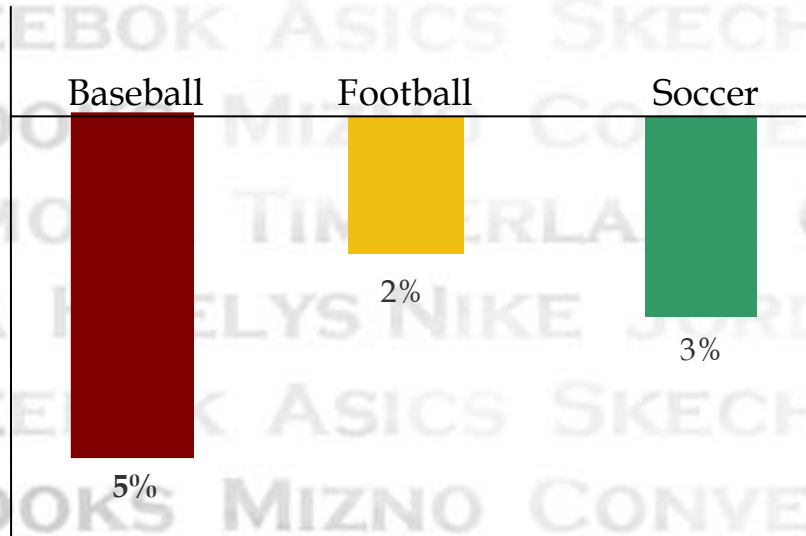


# Year to Date Trend by Category \_Cleared



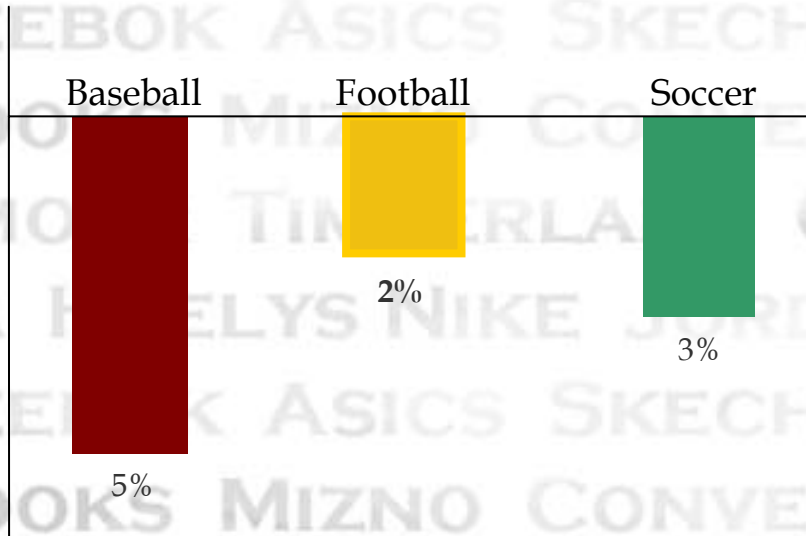
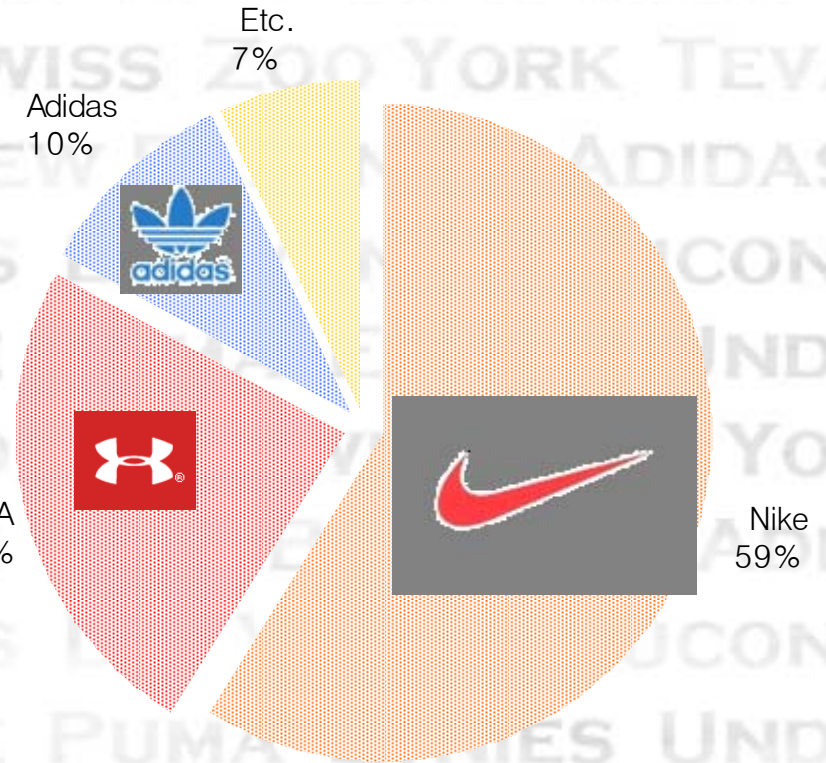
# Year to Date Trend by Category

## Cleated Baseball



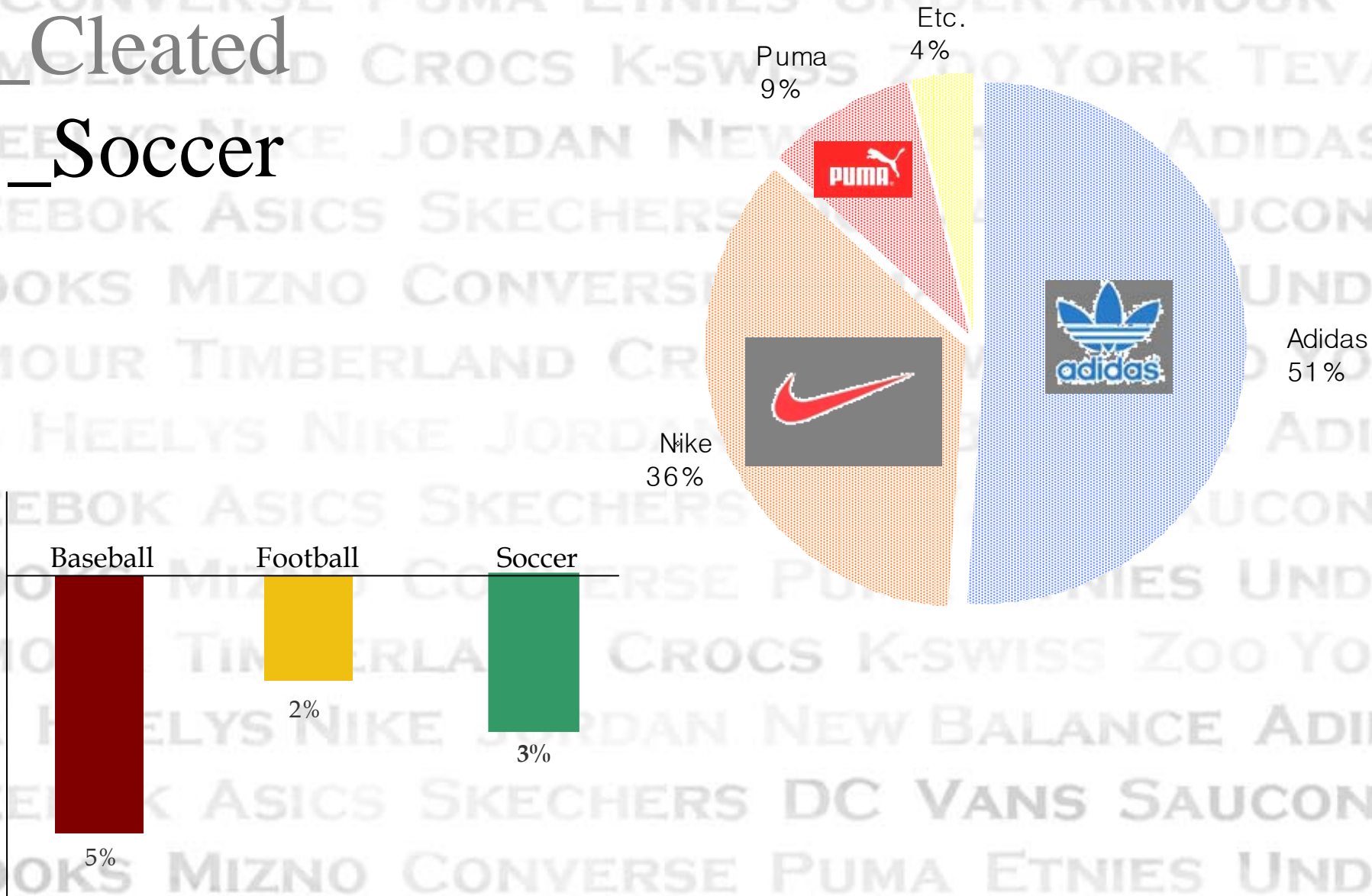
# Year to Date Trend by Category

## Cleated Football



# Year to Date Trend by Category

Cleated  
\_Soccer

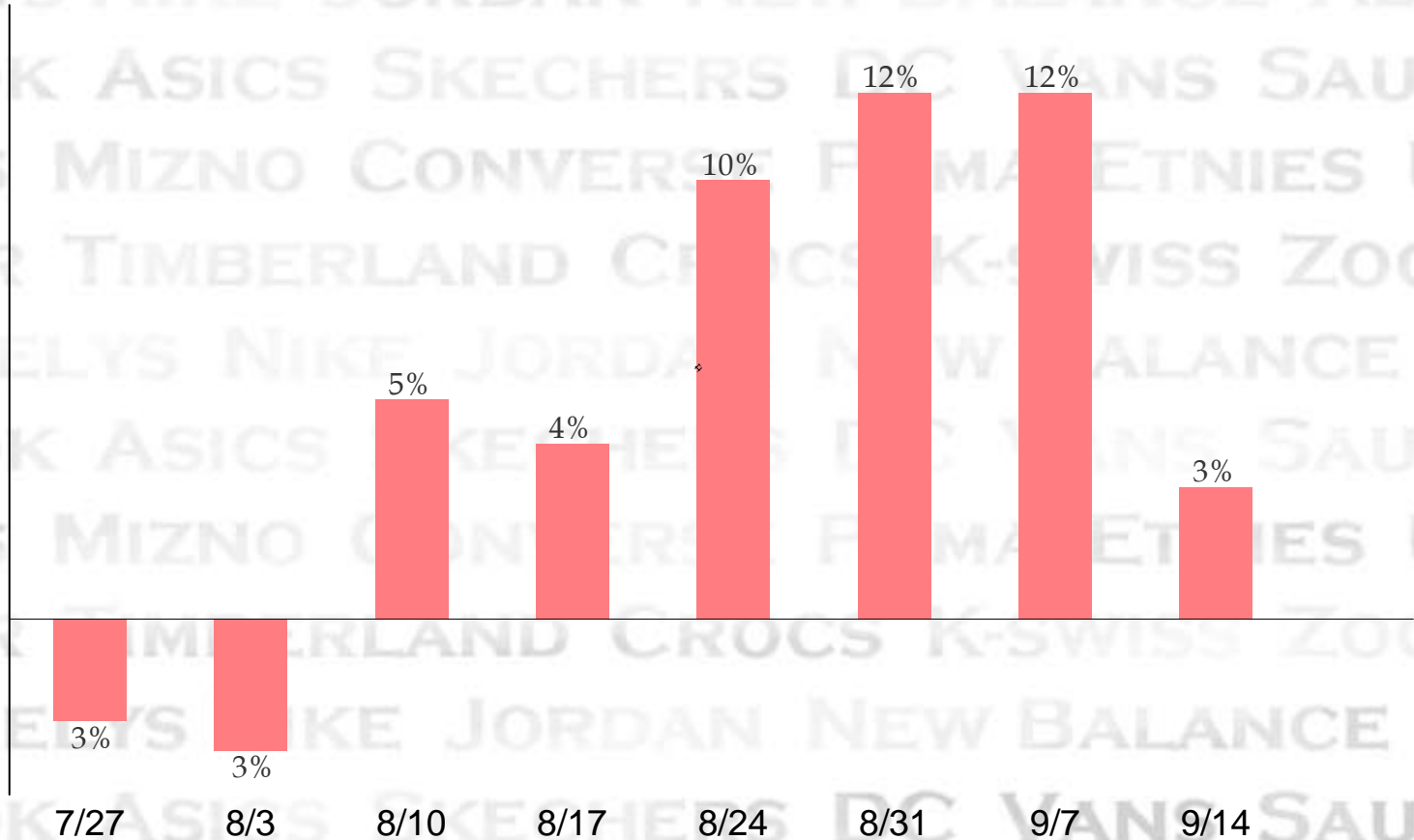


metropolitan  
university

# 2008 Back to School



# 2008 Back to School Sales by Week



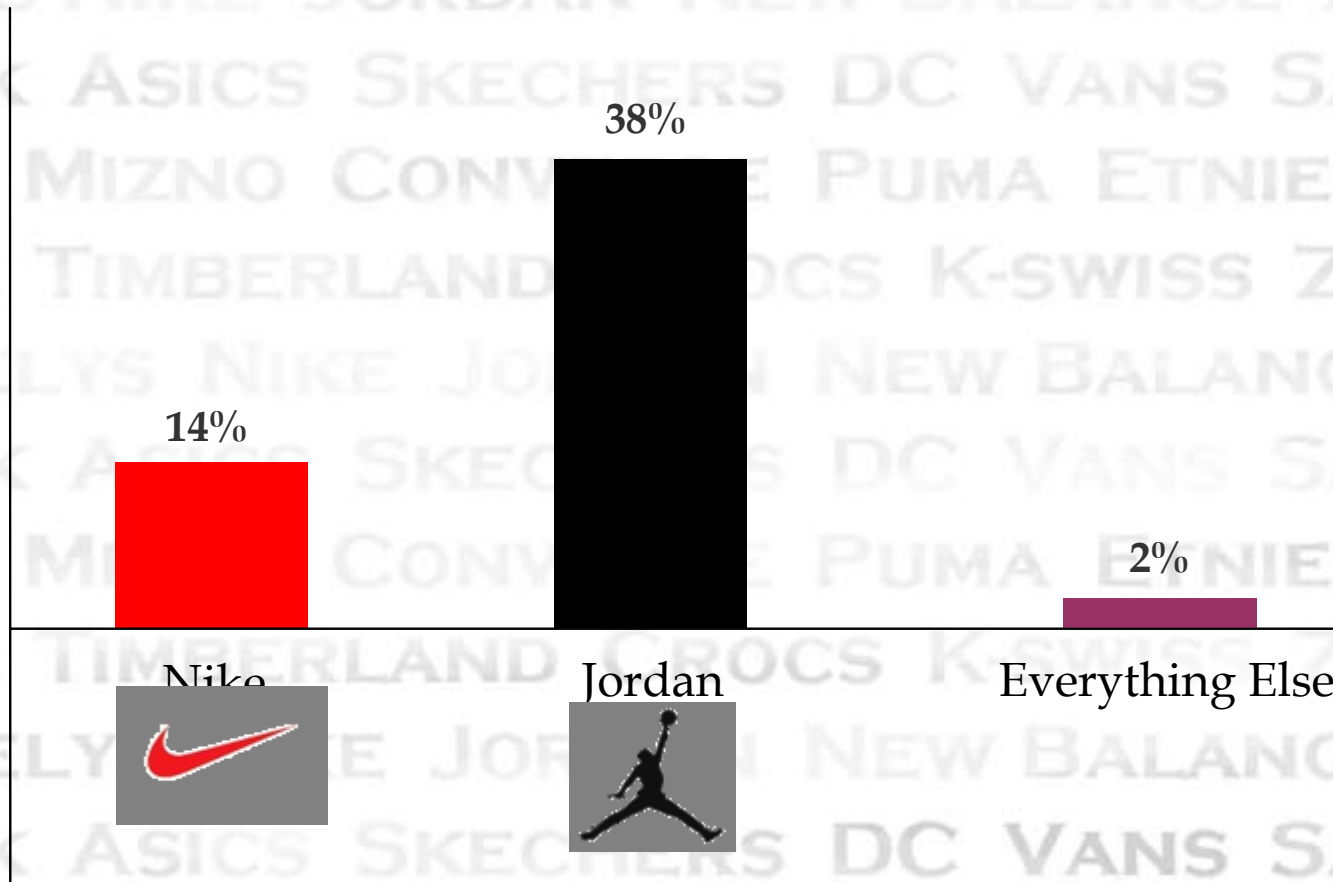


# BTS Trend by Brand

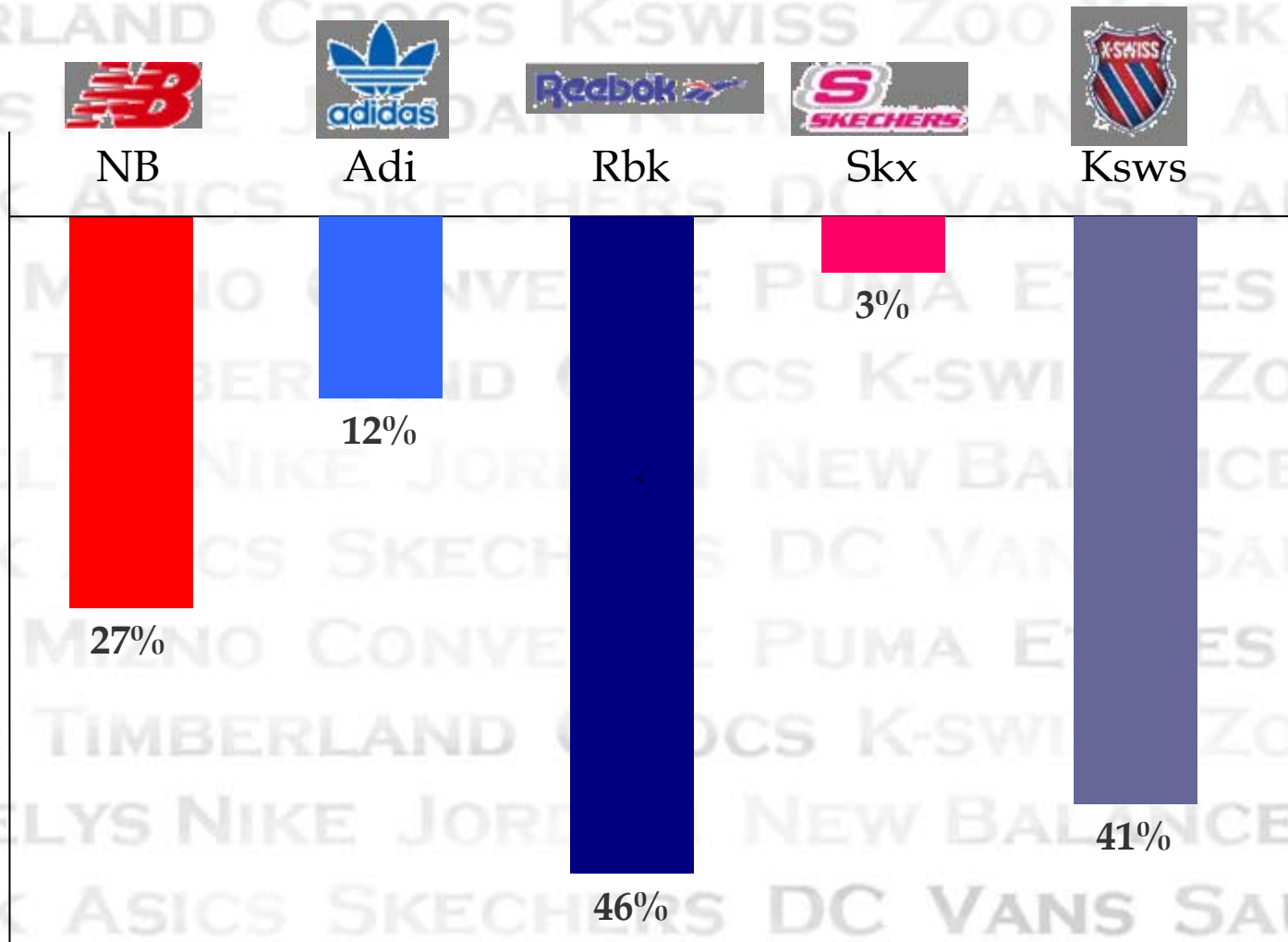




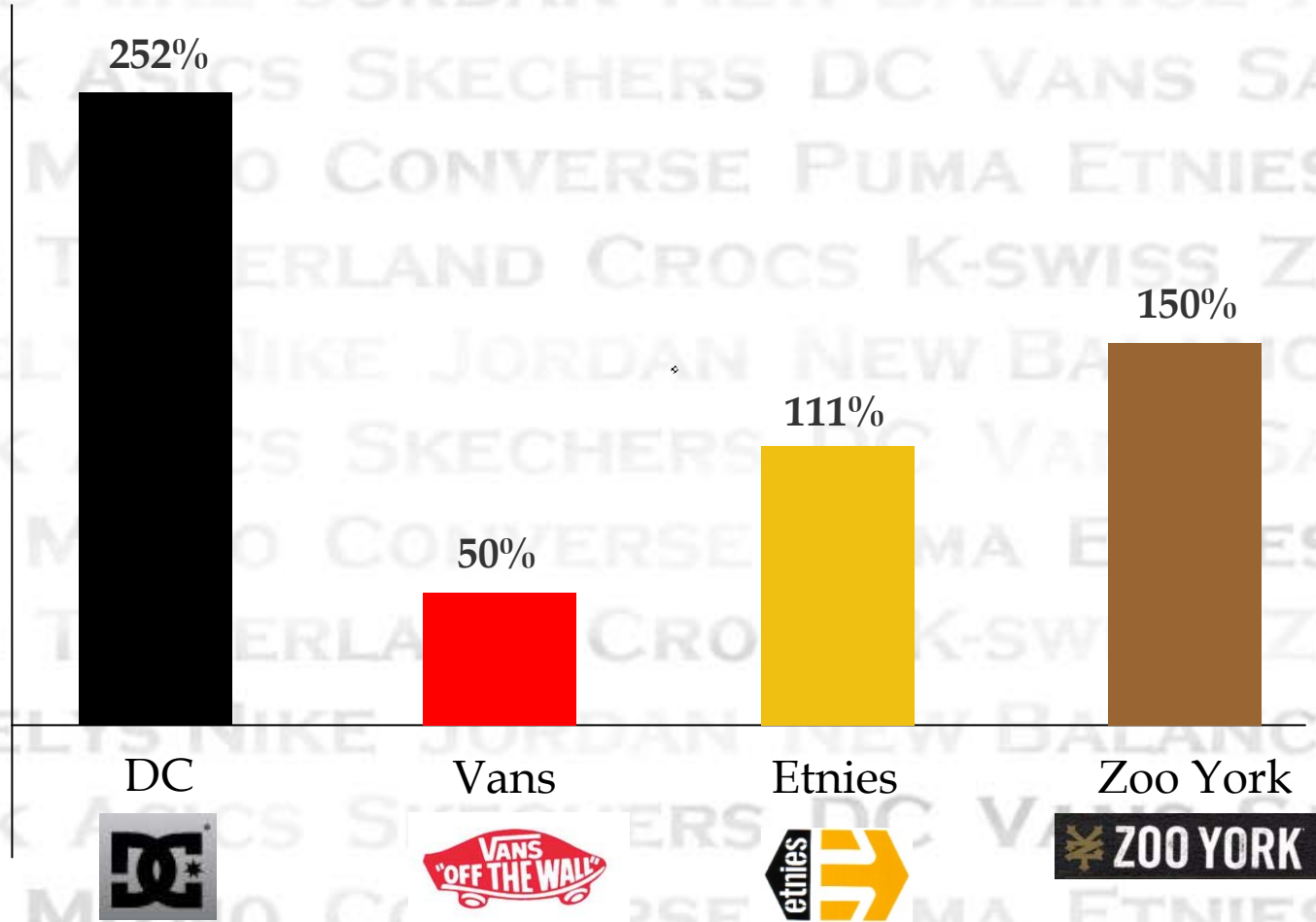
# BTS Trend by Brand



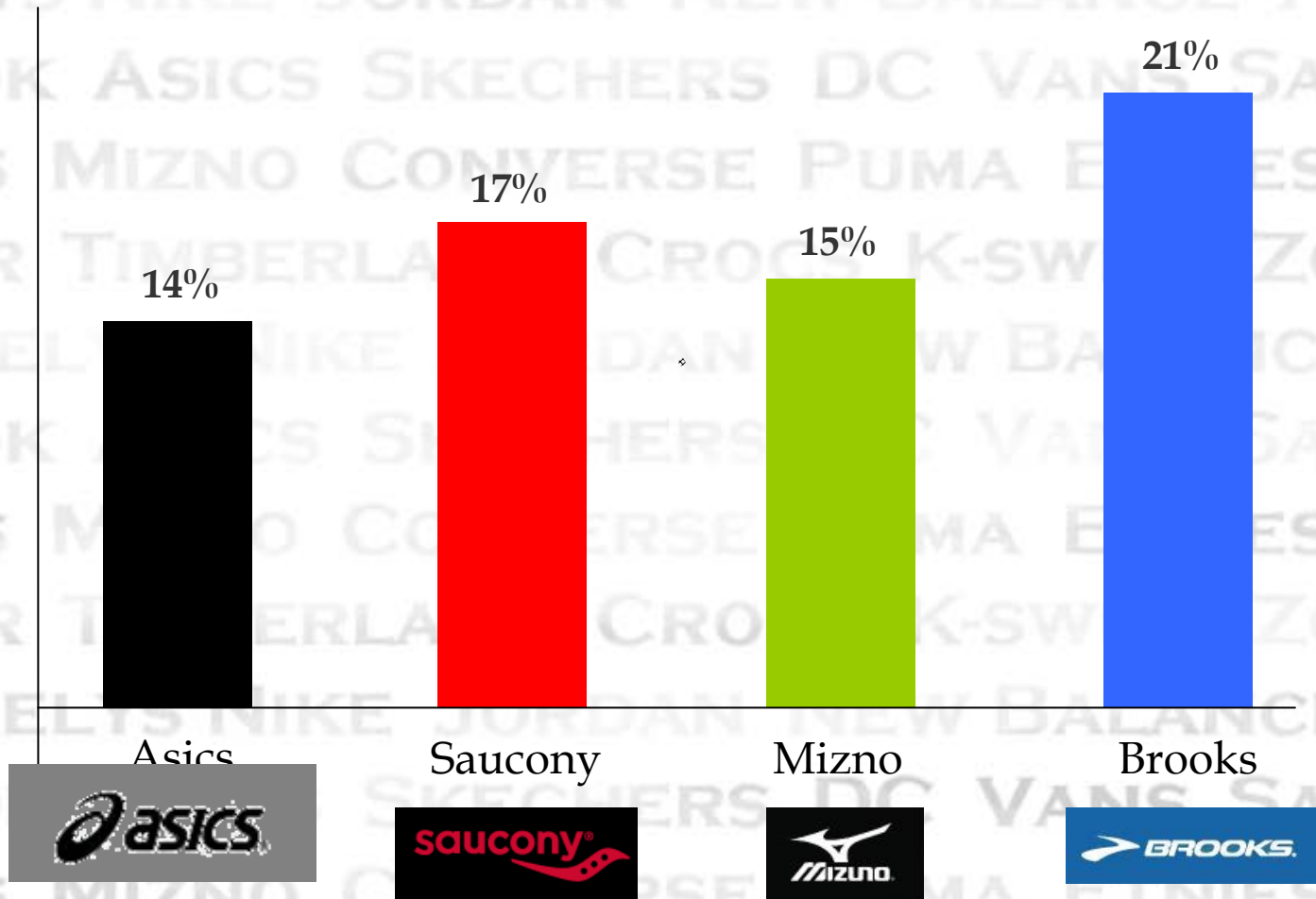
# BTS Trend by Brand



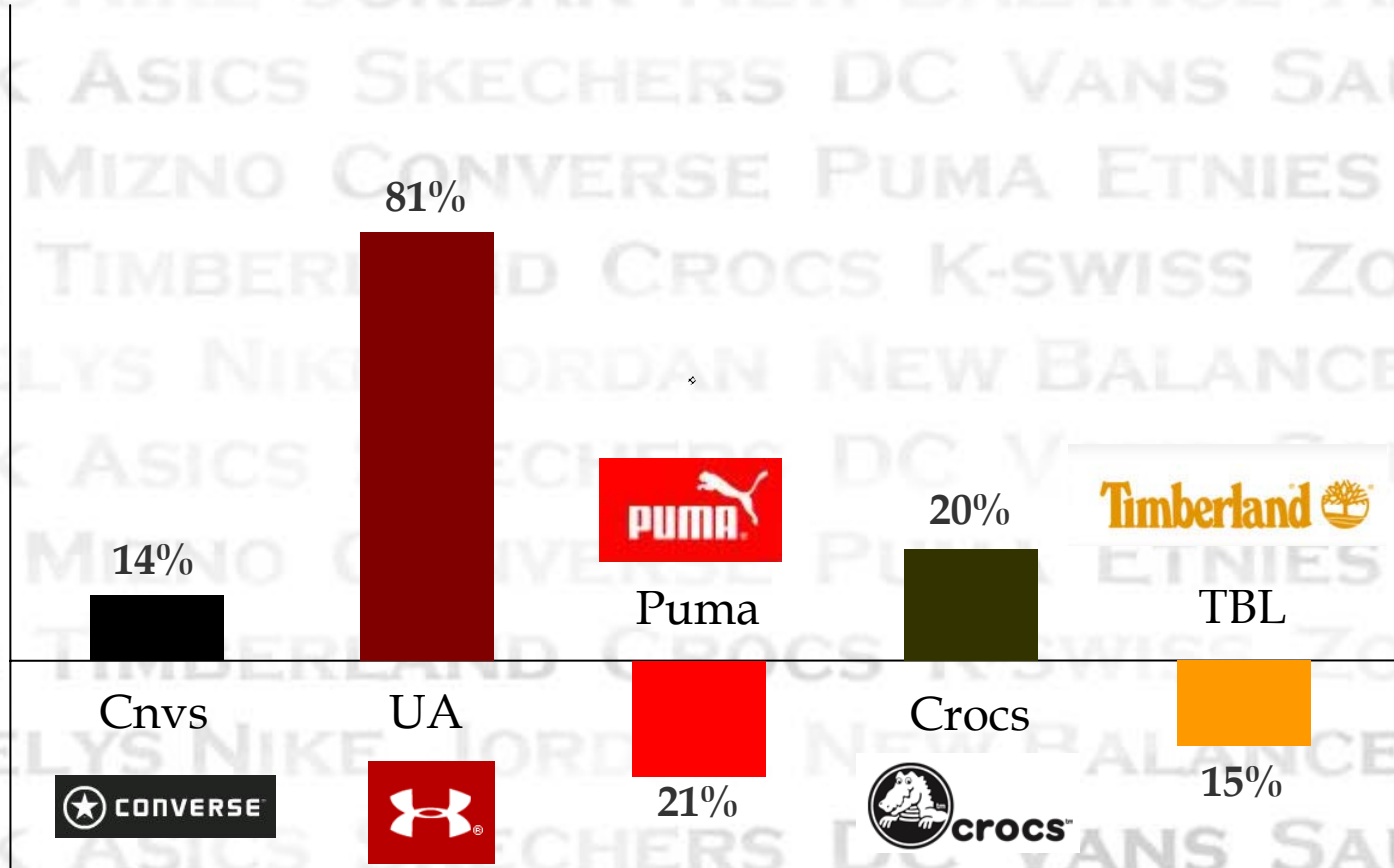
# BTS Trend by Brand

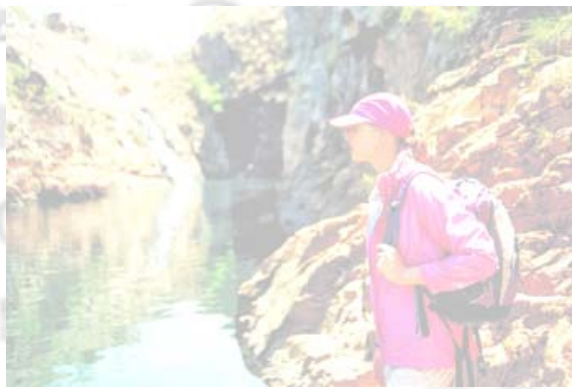


# BTS Trend by Brand

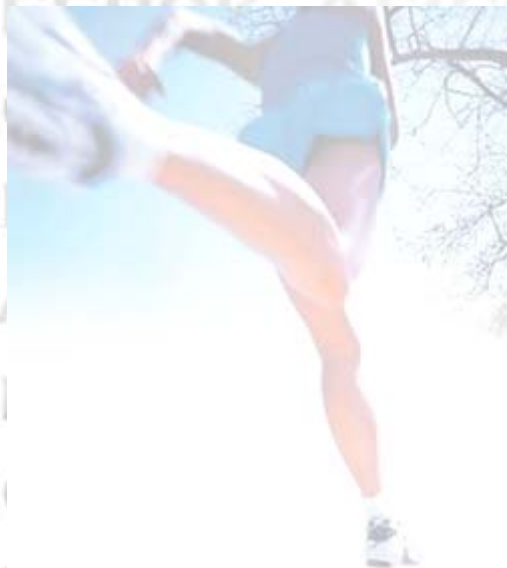


# BTS Trend by Brand

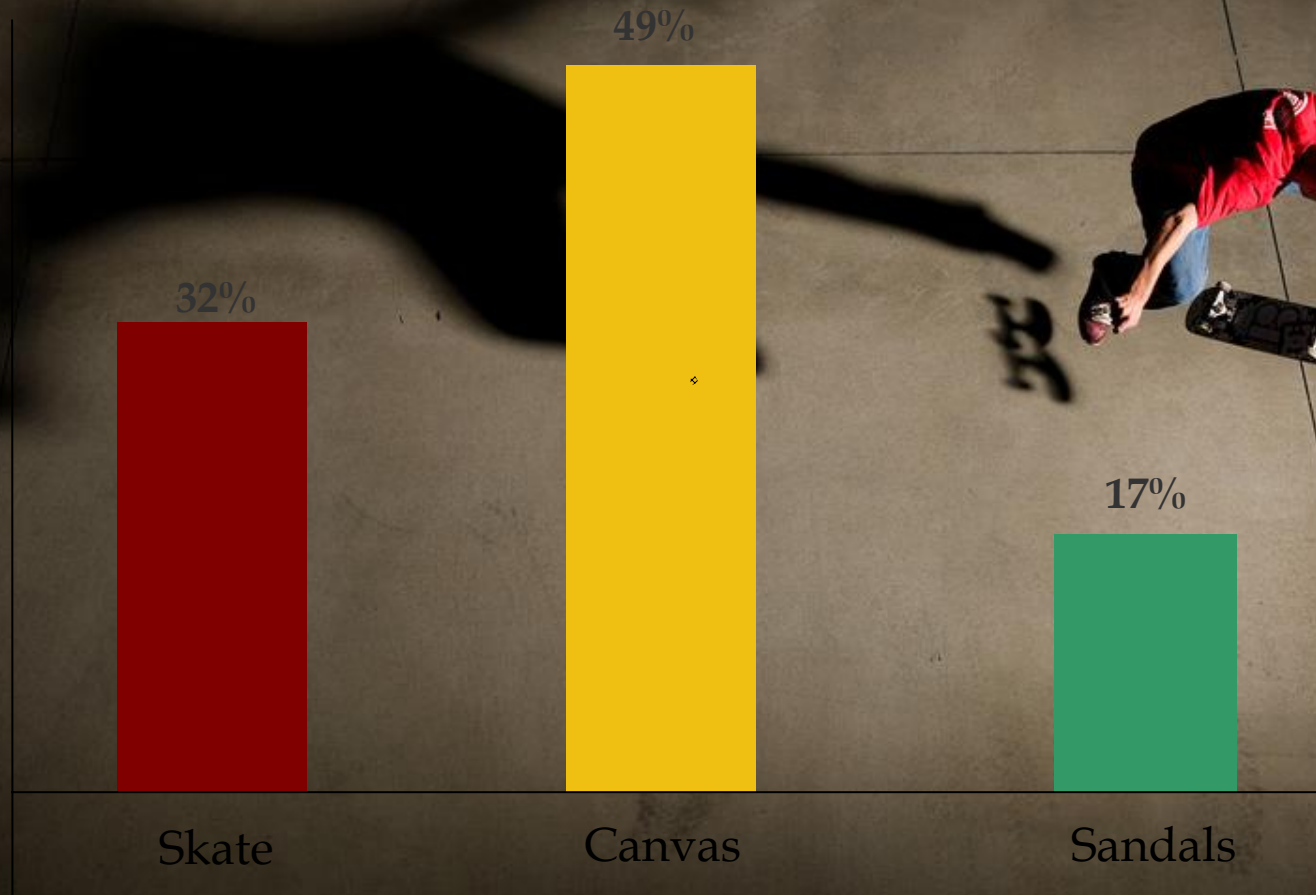




# BTS Trend by Category

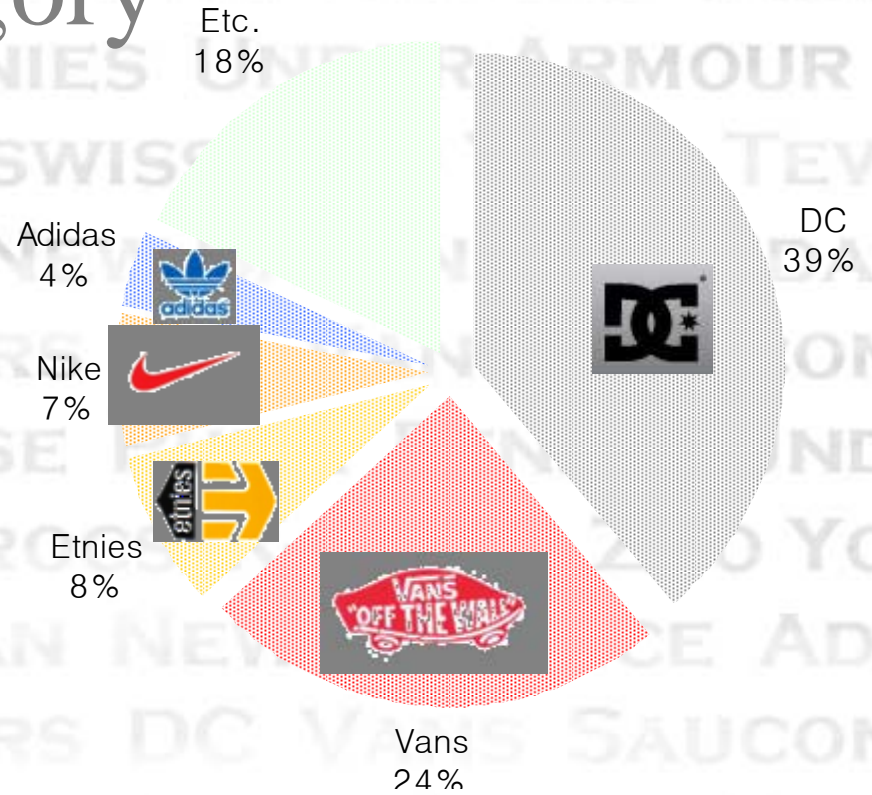
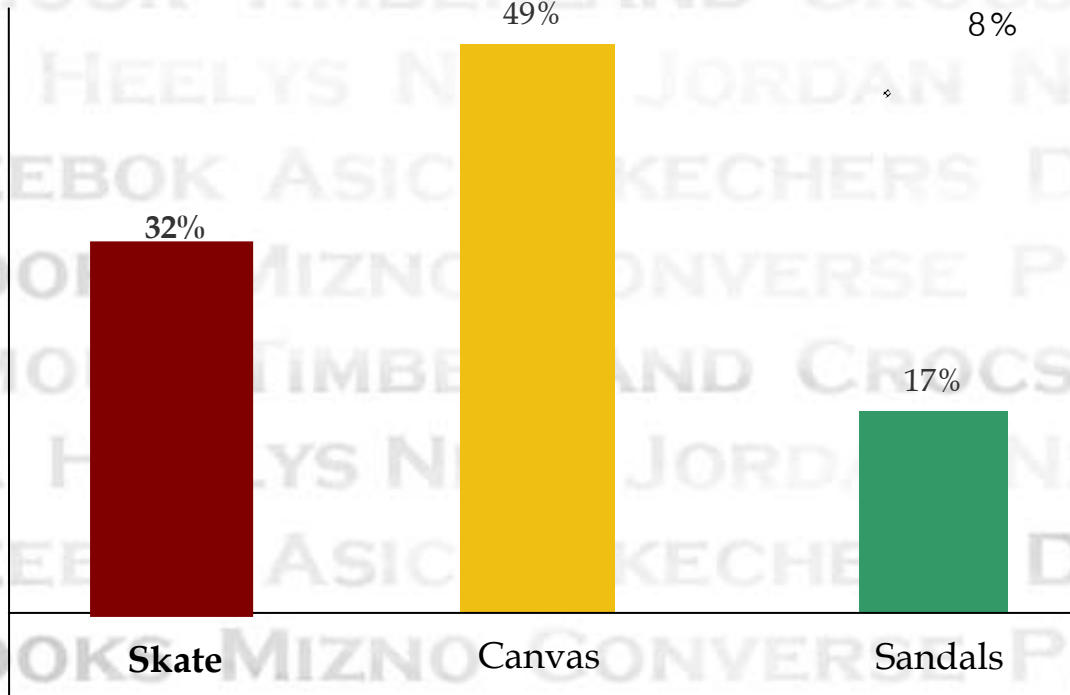


# BTS Trend by Category



# BTS Trend by Category

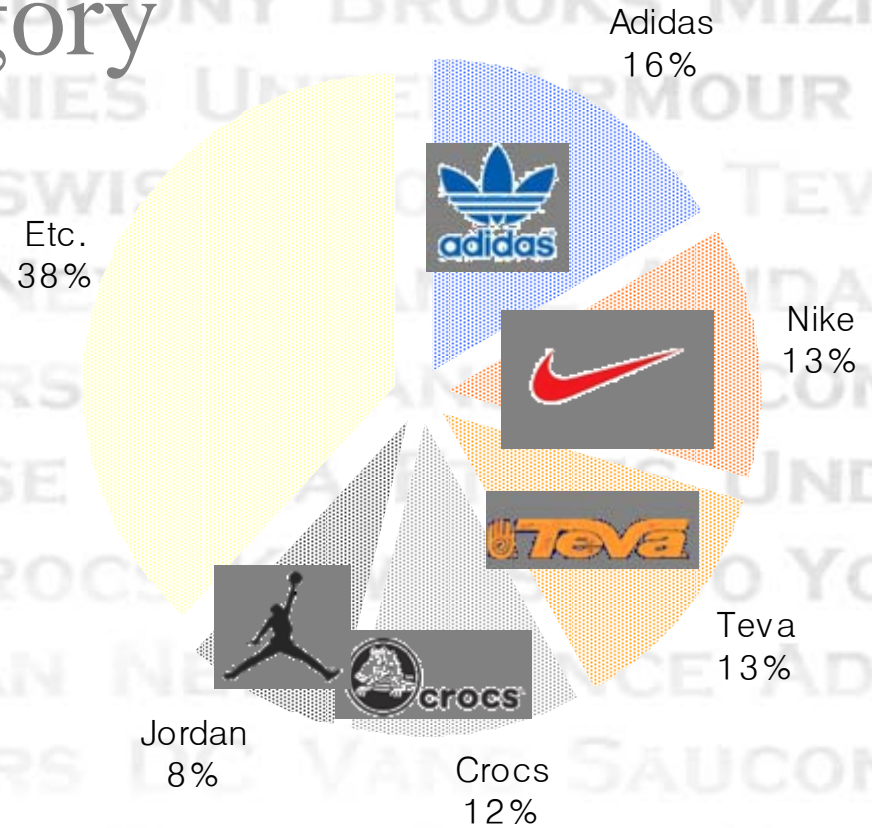
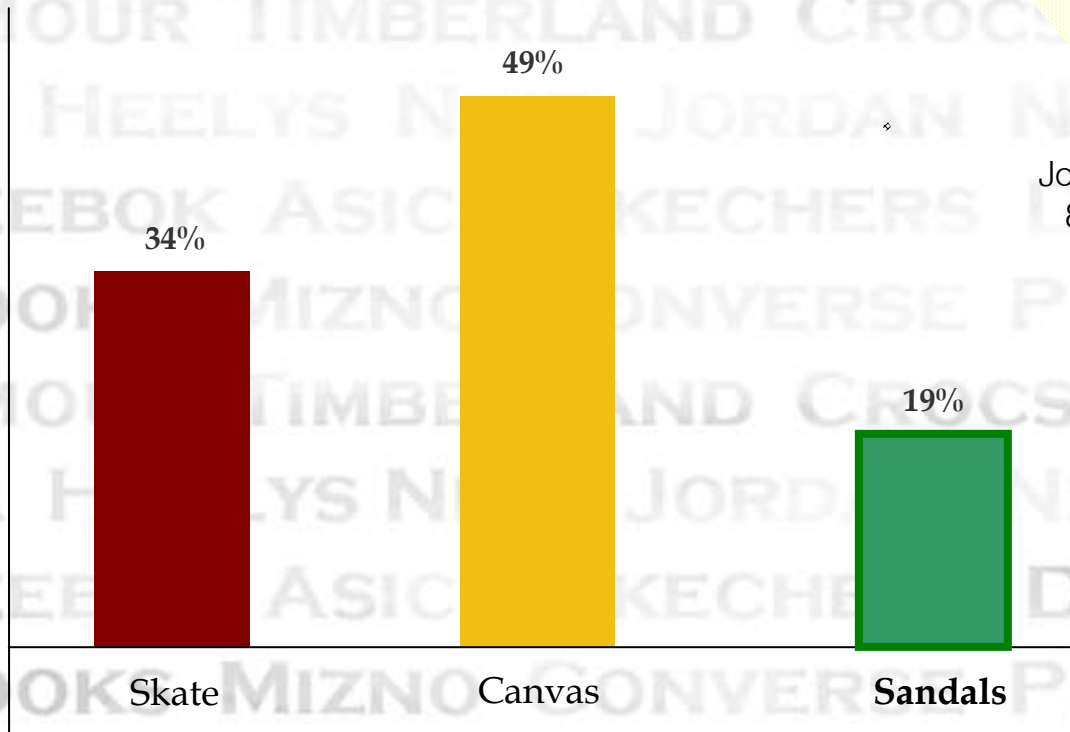
## Skate



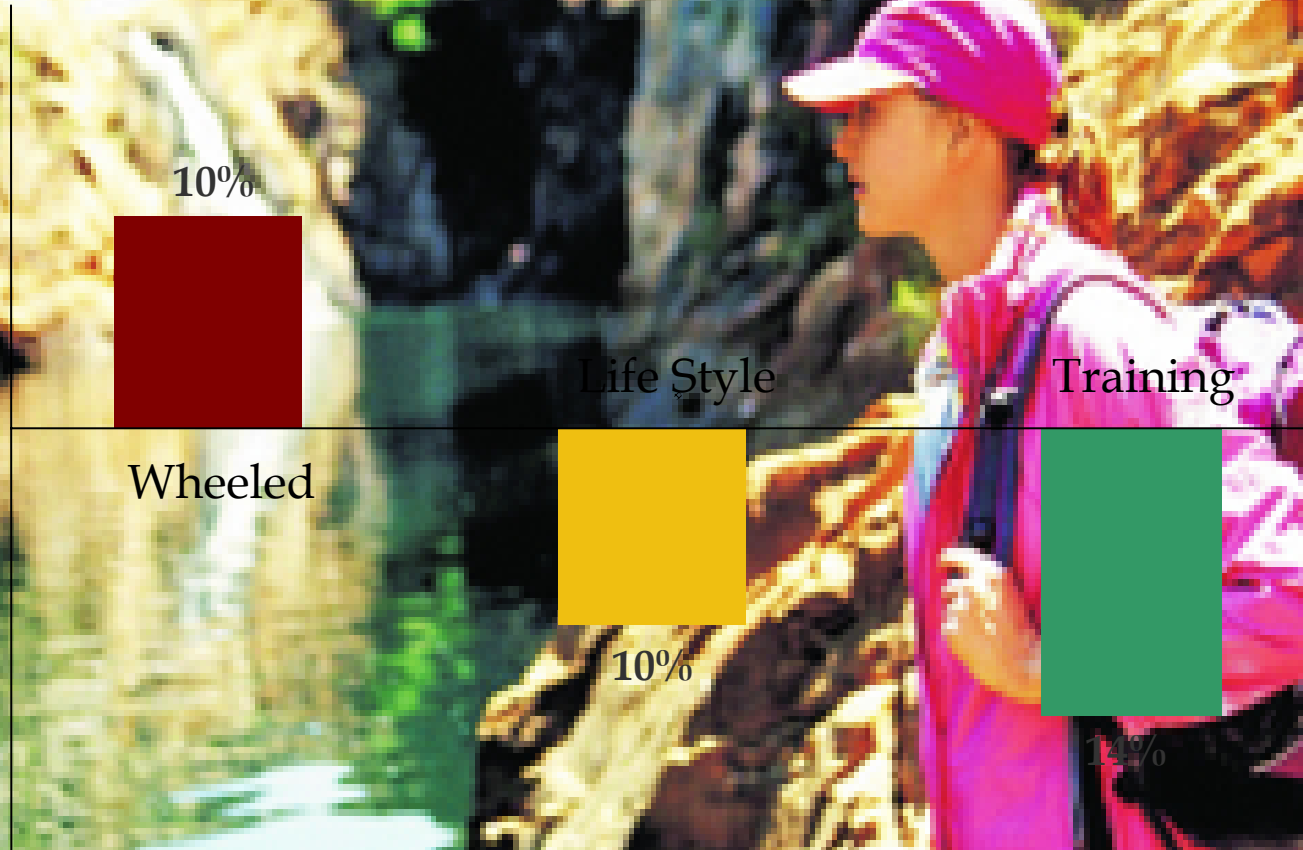


# BTS Trend by Category

## Sandals

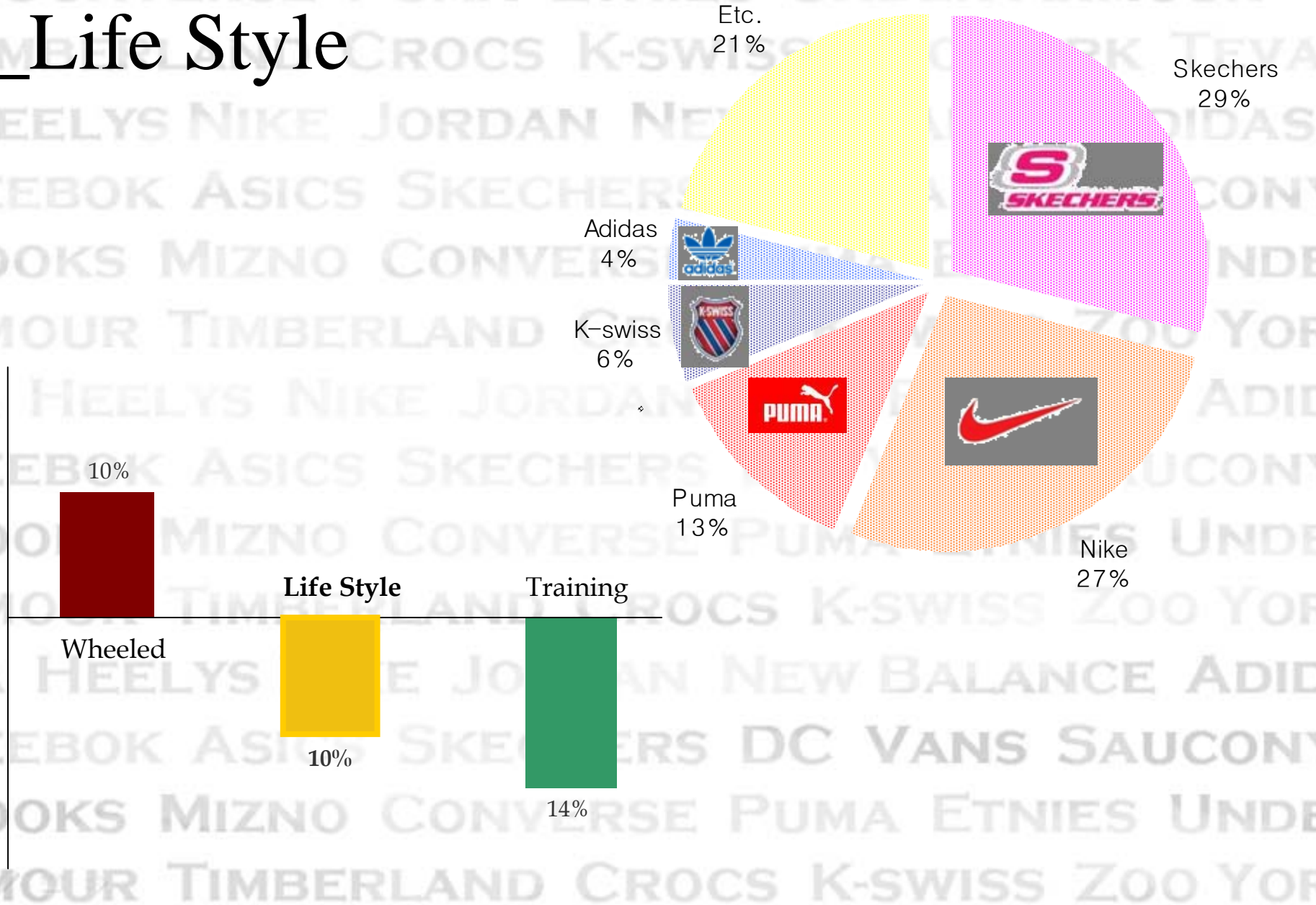


# BTS Trend by Category



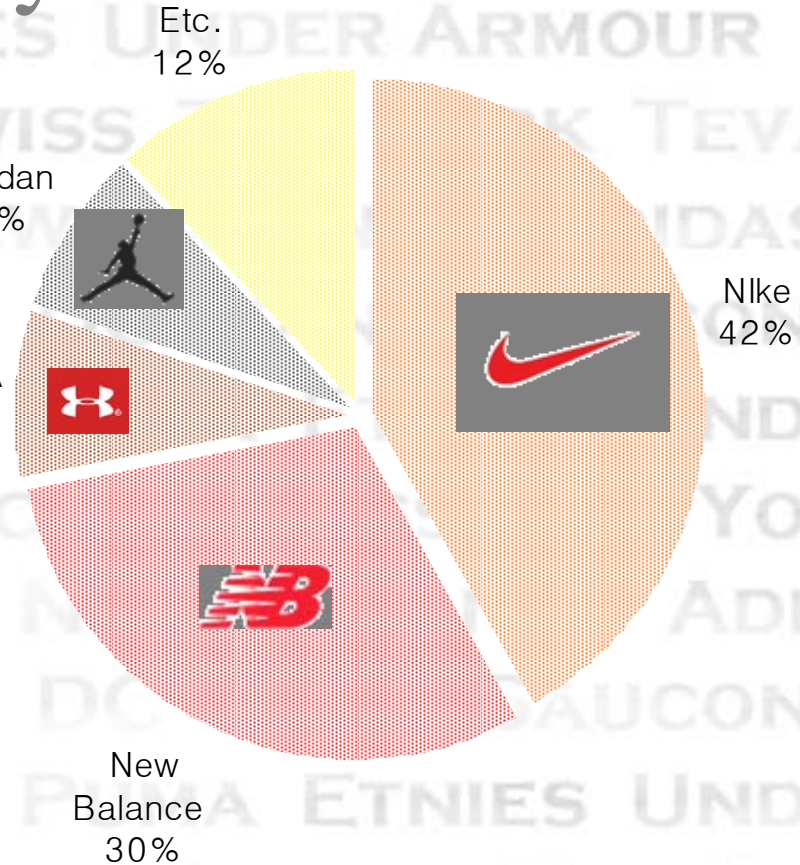
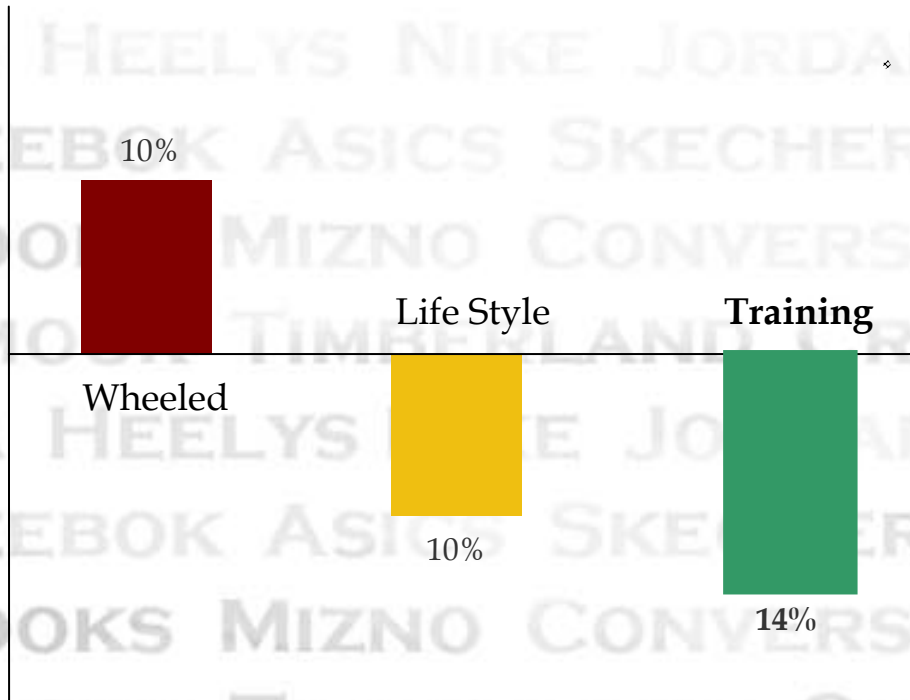
# BTS Trend by Category

## Life Style



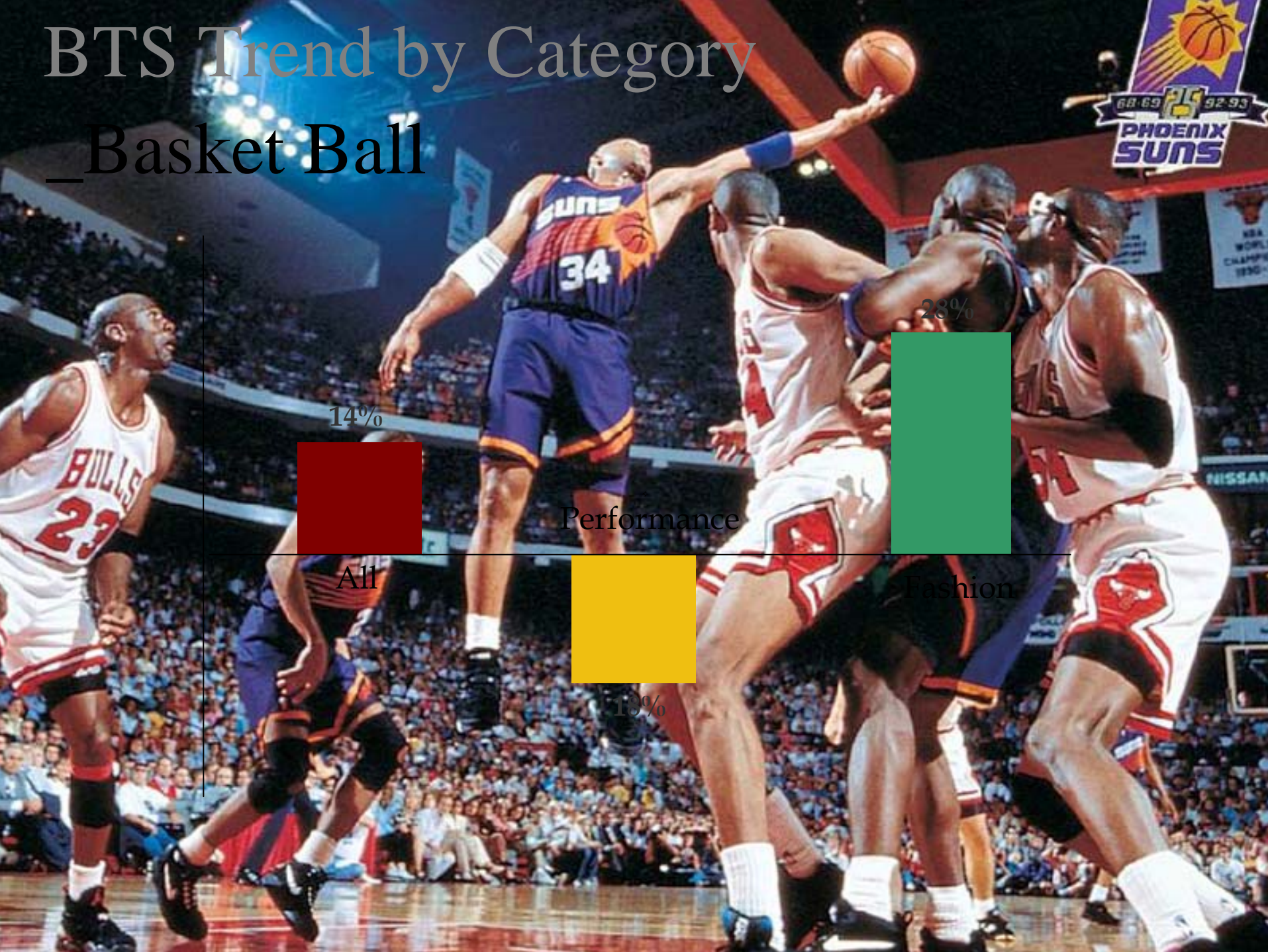
# BTS Trend by Category

## Training

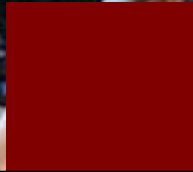


# BTS Trend by Category

## \_Basket Ball



14%



All

Performance



10%

28%

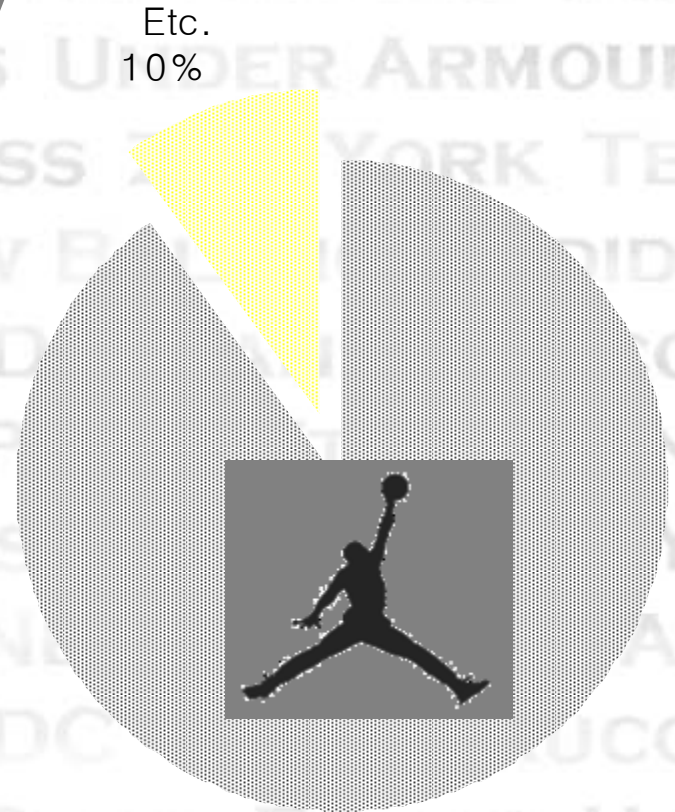
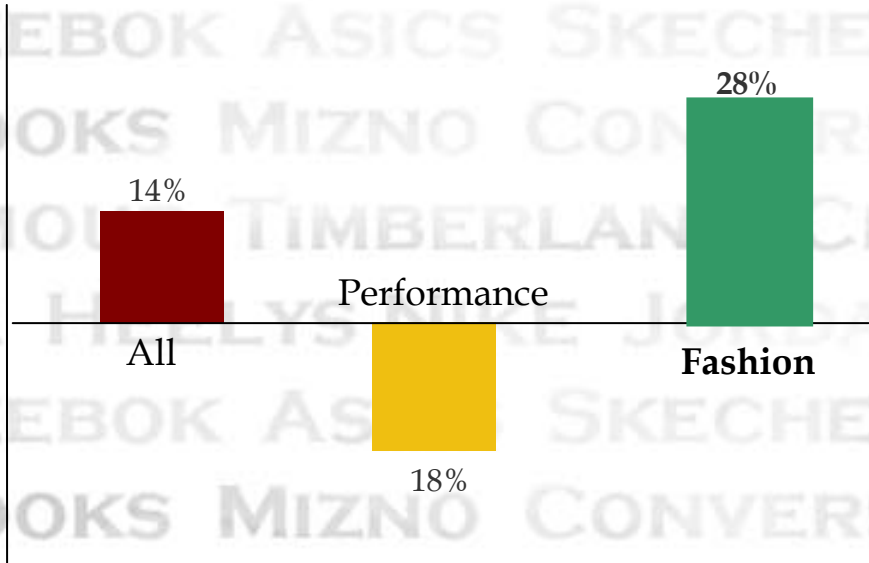


Fashion

# BTS Trend by Category

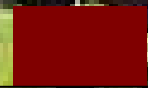
## Basket Ball

## Fashion



# BTS Trend by Category

## \_Running



All



7%



Fashion



5%



>\$100

Performance

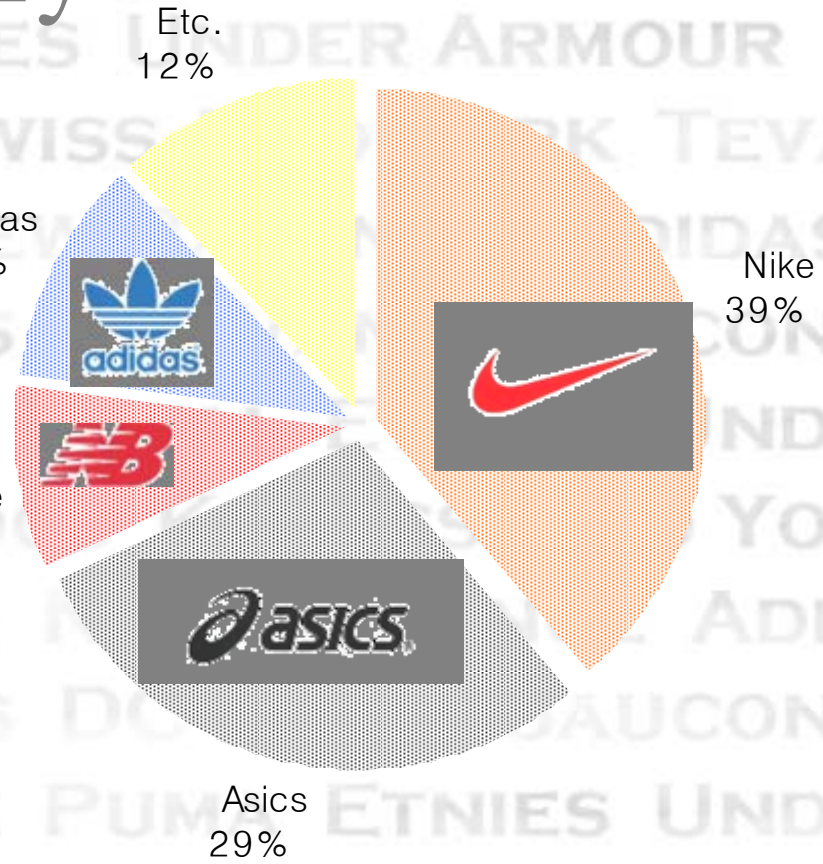
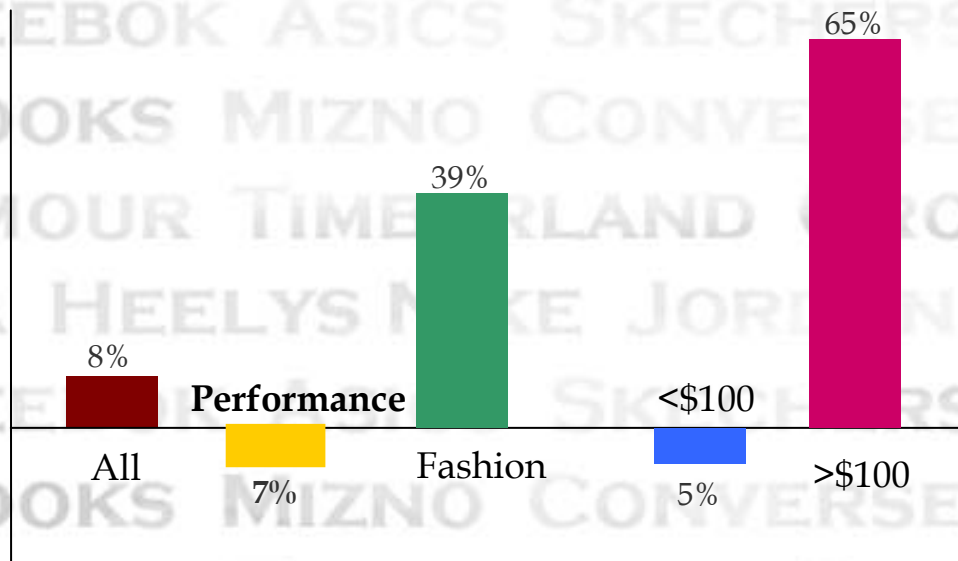
39%

<\$100

65%

# BTS Trend by Category

## Running \_Performance

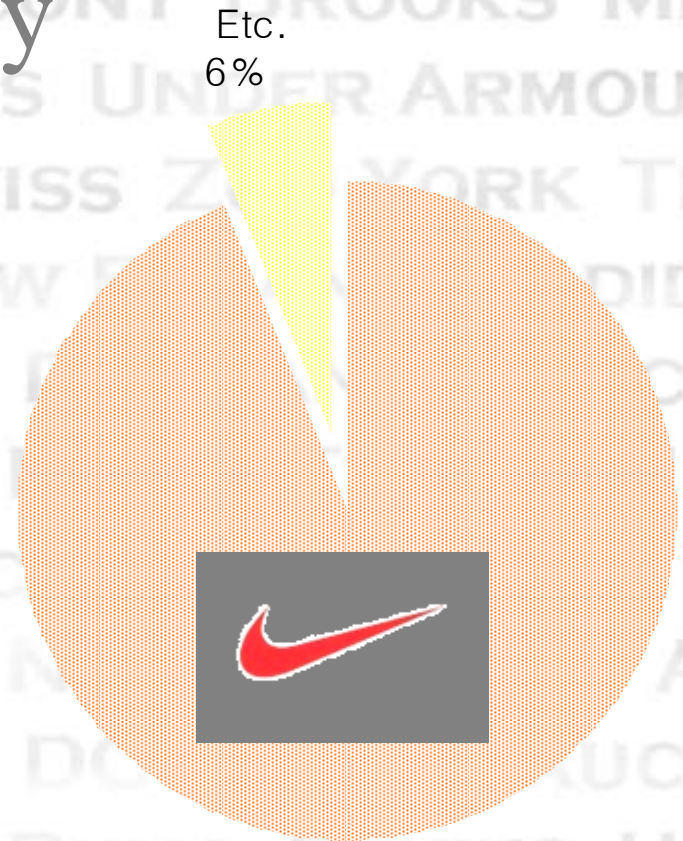
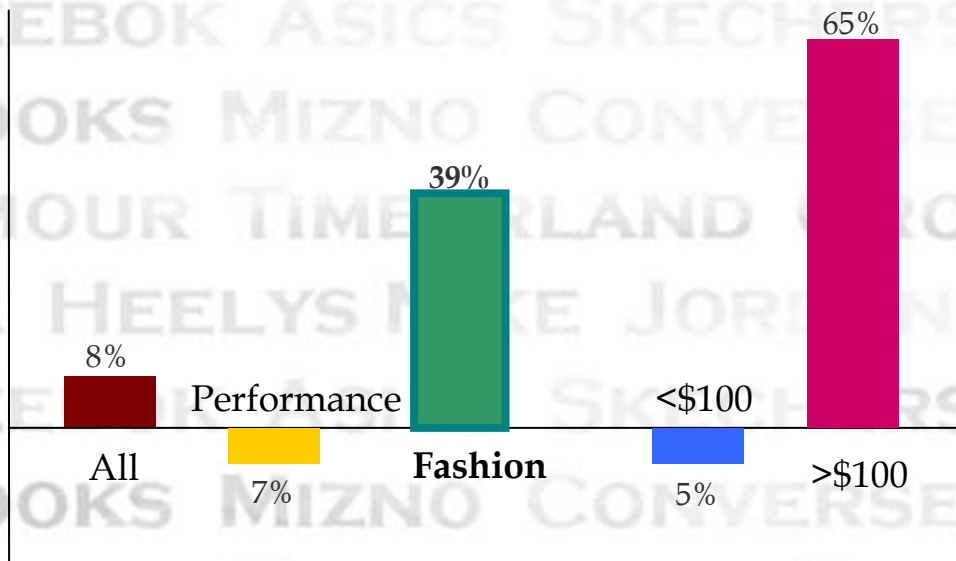




# BTS Trend by Category

Running

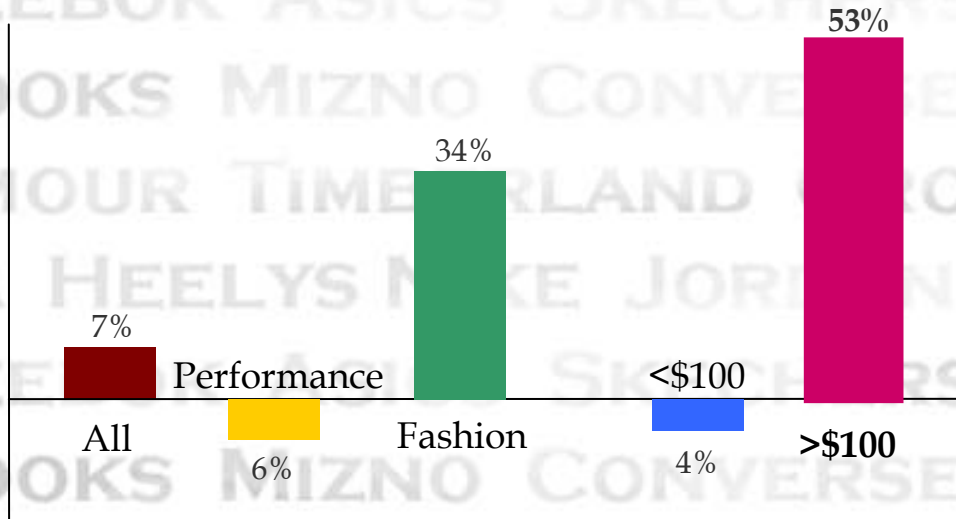
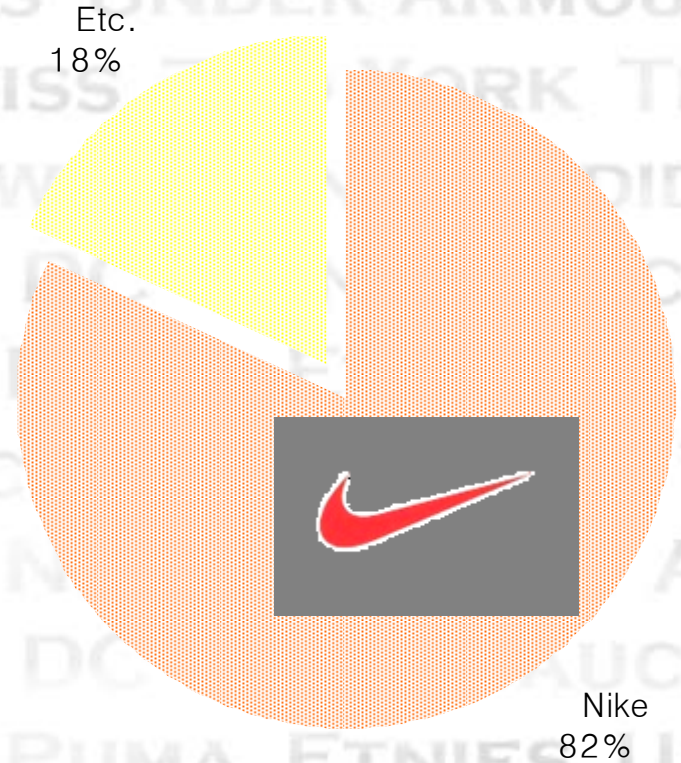
Fashion



# BTS Trend by Category

## Running

>\$100



# BTS Trend by Category

\_Cleared

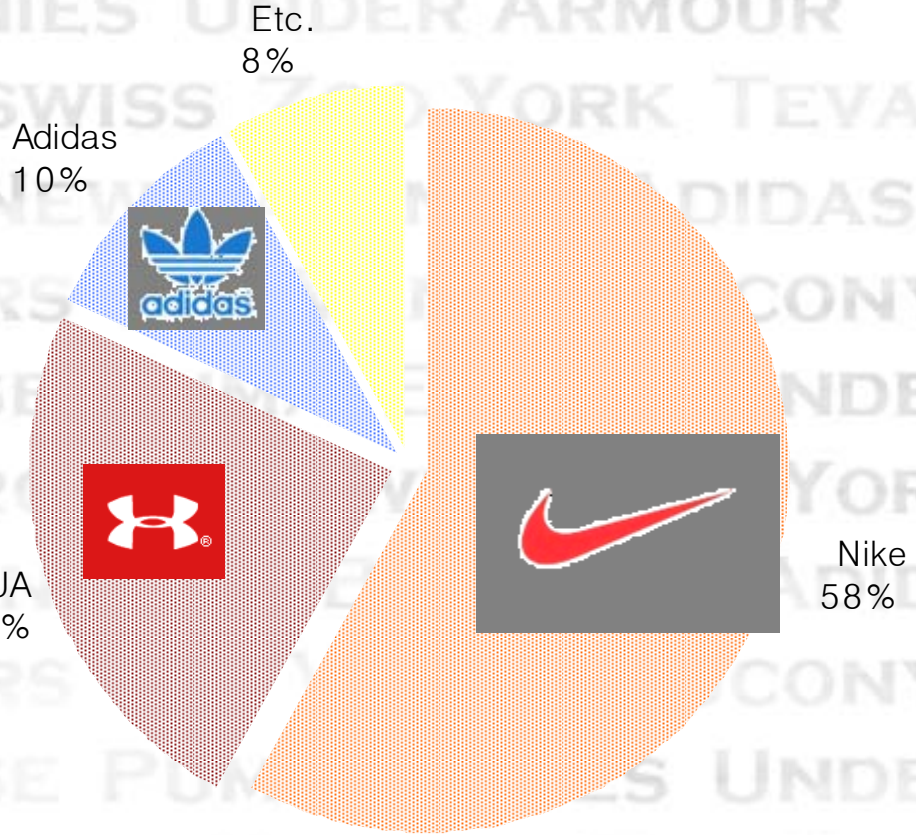
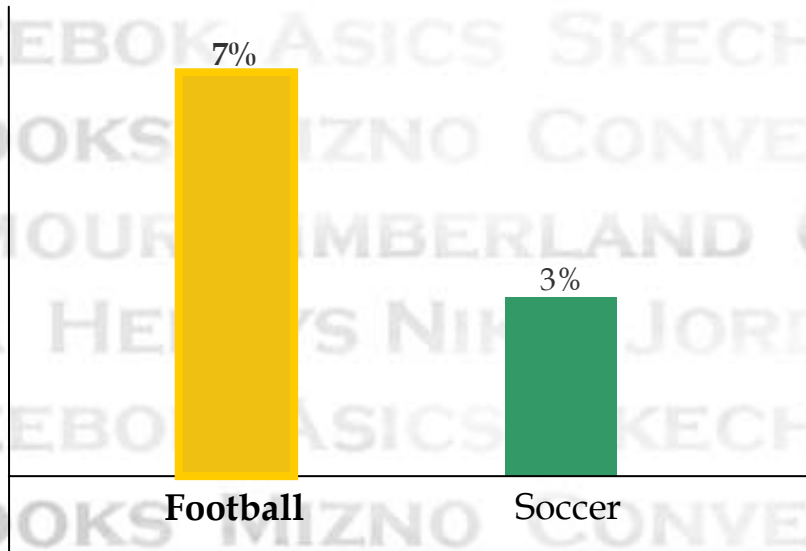


Football

Soccer

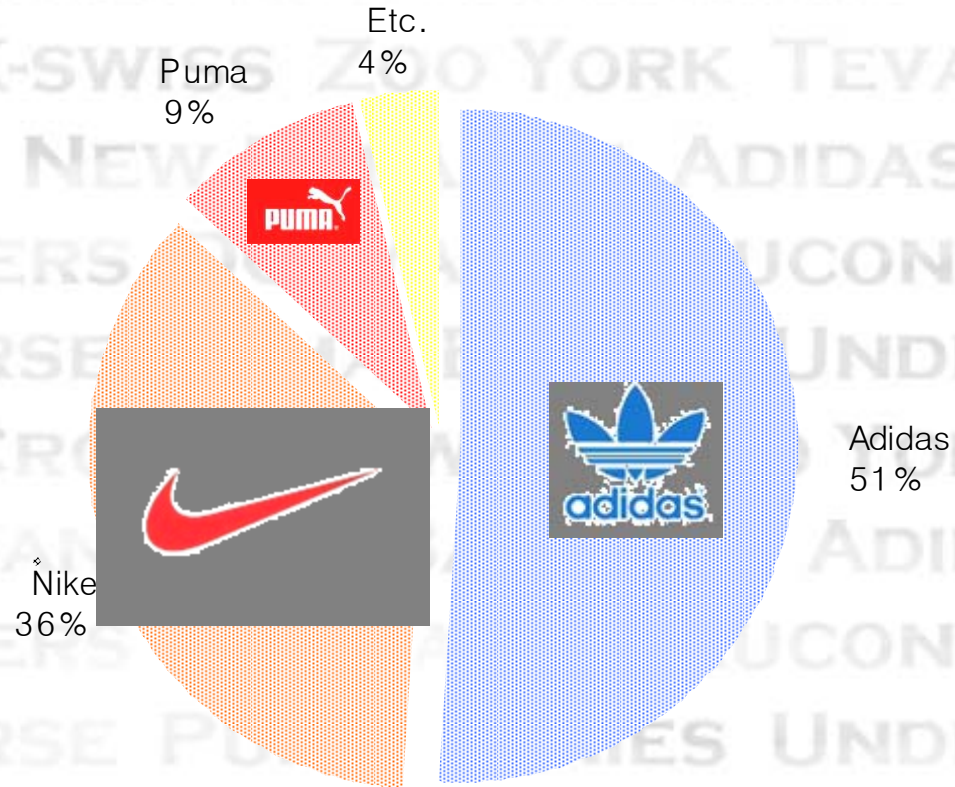
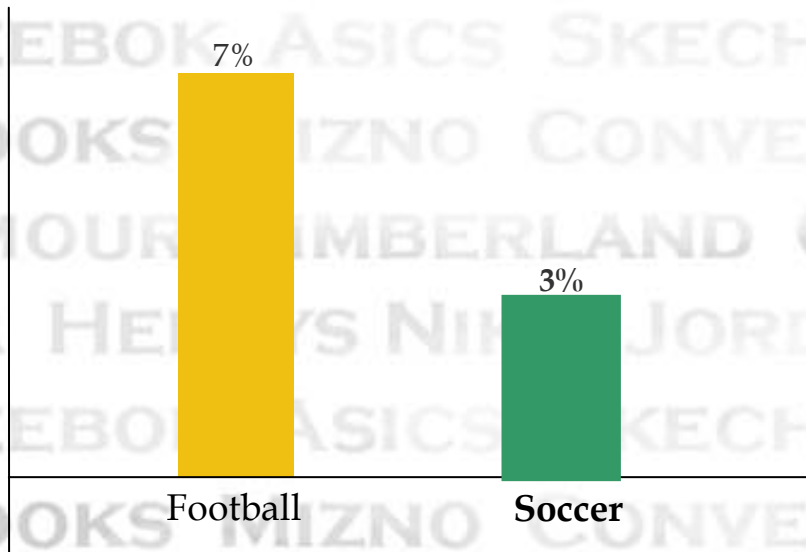
# BTS Trend by Category

## Cleated Football



# BTS Trend by Category

Cleated  
\_Soccer



# Predictions

# 2009 Predictions

Flat Holiday, Tough 2009



**Wall Street Chaos**

**Consumer Credit**

**Tighten**

SKECHERS DC VANS SAUCONY BROOKS MIZNO  
CONVERSE PUMA ETNIES UNDER ARMOUR  
TIMBERLAND CROCS K-SWISS ZOO YORK TEVA  
HEELYS NIKE JORDAN NEW BALANCE ADIDAS  
REEBOK ASICS SKECHERS DC VANS SAUCONY  
BROOKS MIZNO CONVERSE PUMA ETNIES UNDER  
ARMOUR TIMBERLAND CROCS K-SWISS ZOO YORK  
TEVA HEELYS NIKE JORDAN NEW BALANCE ADIDAS  
REEBOK ASICS SKECHERS DC VANS SAUCONY  
BROOKS MIZNO CONVERSE PUMA ETNIES UNDER  
ARMOUR TIMBERLAND CROCS K-SWISS ZOO YORK

**Thank you\_**

BROOKS MIZNO CONVERSE PUMA ETNIES UNDER  
ARMOUR TIMBERLAND CROCS K-SWISS ZOO YORK