Crocs, Nike, Shein favourite brands of America's Gen Z: LEK survey

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Boston-based global consulting firm LEK’s latest survey on the most preferred clothing and footwear brands by Gen Z (people aged between 9 to 24) in the US revealed that Crocs, Nike, Shein, Columbia and Dr Marten’s are among the top choices.

The company’s findings in 2022 US footwear and apparel brand heat index are segmented across generations (including millennials and Gen X) by gender across four categories of use. To assess the relative ‘hotness’ or growth trajectory of each brand, LEK compiled the survey results into a new 'brand heat index'.

In athletic footwear category, Nike and Brand Jordan dominate for both men and women. Beyond those, Vans, Converse, Adidas, Under Armour, Veja and On Running are in the top 10 across genders. Filling out the top 10 for women are Nobull and Tretorn, with Puma and New Balance for men.

Similar to footwear, Nike dominates athletic apparel for both men and women followed by Lululemon. The top ten women's brands also include Gymshark, Fabletics and Sweaty Betty. Adidas, Champion and Supreme are big for both men and women, and startup brands, such as Tracksmith, Western Rise and Vissia, are popular for men.

For casual footwear Crocs, Dr Martens, Birkenstock and Timberland are among the top five hottest brands for both Gen Z men and women. The lists split after that, with men preferring brands like Polo Ralph Lauren and Tommy Hilfiger and newer ones, like Greats, Vionic and OluKai.

Women also look to brands such as – UGG, Calvin Klein and Tommy Hilfiger – as well as sustainability-minded Thousand Fell, with newer brands Tkees and Asos rounding out the top 10.

Leading the women’s casual apparel are online fast fashion brands - Shein, Fashion Nova and Prettylittlething, with retail brands Carhartt, Urban Outfitters and Zara performing well, too.

Gen Z women also identify with more affordable brands, such as Forever 21. The men's list is also topped by
Shein, but the leading players are more classic brands, with Tommy Hilfiger and Carhartt rounding out the top three. For Gen Z men, other mall-based retailers – Uniqlo and Hollister – join the list. American Eagle, H&M and Hot Topic are popular for men and women.

When it comes to outdoor footwear Columbia is highly popular among both men and women. For women, that’s followed by brands present on the men’s list: Bearpaw, Reef, Sorel and Merrell. Teva, Mammut and Arc’teryx are hot for women and Eddie Bauer rounds out the top 10. For men, Black Diamond tops the list with Oakley in second. Also hot for men: Cat Footwear and Helly Hansen.

"In the outdoor footwear segment, our survey revealed a greater range even within the top ten rated brands, signaling there are just handful of brands driving differential growth in consumer appeal and a long tail of others doing well but without as strong consumer interest," said Jon Weber, LEK partner and survey report co-author.

For both men and women, the outdoor apparel market is led by brands like The North Force, Patagonia and Columbia. The lists split from here – for women, Fjällräven, Helly Hansen, Norrøna, Rab, Arc'teryx, Freefly and Rossignol finish the top 10. And for men, the list continues with NRS, Snow Peak, Norrøna, Aether, Oakley, Simms and Black Diamond.

"Interestingly, Gen Z men – based on the scores they assigned to the top 10 brands – are less engaged or excited by many outdoor apparel brands relative to their Gen X and millennial counterparts," said Weber.

With dress footwear Gen Z men are less engaged with the category overall, and mall specialty brands perform strongly, like Aldo. Hugo Boss tops the men’s list, with Alfani and Cole Haan performing well, and Ferragamo, Stacy Adams, Vince Camuto, Kenneth Cole and Nisolo rounding out the top 10. For women, Calvin Klein and Sam Edelman follow Steve Madden, with other brands – Michael Kors, Coach, Kate Spade and Chinese Laundry – behind them. Smaller brands, like Jack Erwin and Franco Sarto, also reach the top 10.

In dress apparel, Calvin Klein tops both lists. Wholesale brands, like Astr the Label and Adrianna Papell, are represented on the women's list, which also includes Michael Kors, Bardot, Kate Spade, MM LaFleur, Veronica Beard and Reformation. The men's dress category finds Ministry of Supply, Banana Republic and Theory performing well, along with Indochino, Marc New York and Zegna.

"Every generation has its own distinct style preferences that can be seen across which brands are trending among each cohort. By understanding which brands are doing the best at reaching and, more importantly, engaging with their targeted consumer segments, other brands, retailers, and investors can devise which strategies are likely to be most impactful for their businesses," said Chris Randall, LEK partner and co-author of the survey report.

"As Gen Z continues to age into greater spending power coupled with its fashion influence, apparel and footwear brands have focused attention their way – and, with shopping behavior and attitudes varying versus other generations, brands and investors need to better understand their generational preferences to gain an upper hand," said Laura Brookhiser, LEK partner and co-author of the survey report.

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