

FOOTWEAR INSIGHT[®]

TRENDS, PERSPECTIVE & ANALYSIS • A FORMULA4 MEDIA PUBLICATION

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FOR ADIDAS?

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VENTURES
FORWARD

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DREAMS

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TOP 25
BRANDS
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Editor in Chief
Mark Sullivan
msullivan@formula4media.com
646-319-7878

Managing Editor
Cara Griffin

Senior Editor
Bob McGee

Contributing Editor
Jennifer Ernst Beaudry

Art Director
Francis Klaess

Associate Art Director
Mary McGann

Contributors
Nancy Ruhling
Suzanne Blecher

Publisher
Jeff Nott
jnott@formula4media.com
516-305-4711

Advertising
Daemon Filson
dfilson@formula4media.com
541-292-1450

Jeff Gruenhut
jgruenhut@formula4media.com
404-849-4156

Christina Henderson
516-305-4712
chenderson@formula4media.com

Troy Leonard
tleonard@formula4media.com
352-624-1561

Katie O'Donohue
kodonohue@formula4media.com
828-244-3043

Sam Selvaggio
sselvaggio@formula4media.com
212-398-5021

Production
Brandon Christie
516-305-4710
bchristie@formula4media.com

Business Manager
Marianna Rukhvargher
516-305-4709
mrukhvargher@formula4media.com

Subscriptions
store.formula4media.com

FORMULA4
MEDIA, LLC

PO Box 23-1318
Great Neck, NY 11023
Phone: 516-305-4710
Fax: 516-441-5692
www.formula4media.com

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TIMEOUT | MARK SULLIVAN

DO WHAT THEY CAN'T DO

I RECENTLY HAD A CONVERSATION WITH A senior executive at a major retail chain who told me his company was investing seven figures in a new web build-out because Wall Street was punishing their stock price because they didn't have a "strategy to compete with Amazon."

My initial reaction was that the people on Wall Street are mostly clueless and this proves it. And if you want to compete with Amazon, seven figures, damn, even eight is not going to get it done. I have a contrary opinion. I don't believe you compete with Amazon by building a website, even a really good one. If you try that, Amazon will crush you. The way you compete against Amazon is by doing what they can't do — offer a great in-store brick-and-mortar experience

with tremendous service that makes your customers feel warm and fuzzy.

Amazon is like a giant dry cleaner that gets your clothes really clean, really fast and doesn't charge much. Sometimes, you get the wrong clothes back and sometimes they are counterfeit, but that's a conversation for another day. Your store needs to be like a wonderful washing machine where the clothes come out clean, smelling fresh and tied up with a ribbon and delivered with a hand-written note.

You can't play Amazon's game and win. Just like they can't win at brick-and-mortar. And they certainly can't win at any sort of omni-channel play because they don't have stores.

Retail in 2017 has been a bloodbath, but the closing of these stores and malls will ultimately benefit those that remain. Fewer, better stores should offer consumers a better shopping experience. Shopping online can be a joyless slog. And retailers, just like the exec I referenced above, often try and chase that slog when they should be running in the opposite direction.

Retailers may be getting tired of me writing about how they need to create special, memorable, meaningful experiences, but I say, too bad. I see it in the best stores I visit and I see it with the stores that are winning. I like to win and like to see retailers win, too. If it ever gets to the point where most shopping is done online instead of in-store, that will be a sad day for America. No interaction with clerks, no soft serve ice cream or carousel rides at the mall, no checking out all the other shoppers. Just click, point and wait for the UPS truck. A senior brand executive who is interviewed in this issue emphasizes that he is not in "the shoe business, but in the entertainment business."

Retail in 2017 has been a **bloodbath**, but the closing of these stores and malls will ultimately benefit those that remain.

That's true for him, and even more true for retailers. To win, retailers need to persuade customers to "buy it now." Twenty-four-hour shipping is pretty impressive, but walk out the door with it right now and wear it tonight is even better. I love it when I buy a pair of shoes and the sales associate asks me, "Shall I put them in the box, or do you want to wear them now?"

I always want to wear them now. And your customers do, too.

I would suggest retailers worry less about stock prices and more about what they have in stock. ●

Mark



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NEW BRAND

Building a Community in the Shoe Business

A husband and wife team with experience in the footwear business is launching Community (spelled with one “n”), which they are describing as “a small batch” shoe company that will manufacture in Los Angeles and give a portion of its proceeds to local charities.

Sean and Shannon Scott have more than 40 years of industry experience between the two of them. Sean was one of the original members of Toms shoes and before that spent time at Nike, ASICS and Vans. Shannon has a marketing background and spent most of her time at ASICS, where she most recently oversaw marketing and advertising for the United States.

The two are joined in this new venture by shoe designer Ryan Gumienny and say they want to build a company that “will be a catalyst for change, inspiring action, participation and empowerment of its customers through civic engagement.”

Each pair of shoes purchased by the customer will allow Co-

munity to donate \$10 of their sale to a curated group of non-profit organizations in downtown Los Angeles with the intention of empowering its members to be happy and successful contributors to the community. Customers will be able to select whether they want their contribution to support Education, The Arts or Homeless programs in the city at the time of sale.

The company is originally launching with a direct to consumer model, but retail sales could be in the near future.

Community’s initial offering will include three styles of footwear for men and women, ranging from \$150 to \$180, designed and handcrafted with premium materials. The collection will be manufactured in Los Angeles. By manufacturing locally, Community will focus on sustainable products and processes as well as bringing jobs back to downtown, the Scotts said.

“Producing footwear in Los Angeles is not an easy task,” says Sean Scott. “But it is an important component of our mission to be an integral part of the community and to attract innovative, socially-conscious entrepreneurs back to the heart of the city.” ●

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TRADE SHOW

Sportstyle Show Set for June 14-15 in Fort Lauderdale



and sell more.” These seminars are open to all attendees.

There will be three other business sessions at Sportstyle. On Wednesday, June 14 author and researcher **Pam Danziger** will present “Exercise Your Retail Muscle: Transform your store from a 90-pound weakling to a Shop that POPs!” The session will take place at 8:00 a.m. in Rooms 113-114 in the Fort Lauderdale Convention Center.

At lunchtime on that day, **Joe Prebich**, VP of Brand for Fjällräven, will present “Building A Bridge to the Outdoors: A look at how your store can capture a new generation of outdoor consumers.” The presentation will take place on the Sportstyle stage on the trade show floor.

On Thursday, June 15, well known

The Sportstyle Trade Show and Conference will take place Wednesday and Thursday, June 14 and 15, 2017 at the Fort Lauderdale Convention Center.

The two-day event will bring together approximately 75 apparel, footwear and accessory brands in the active lifestyle category, including **361, Altra, ASICS, Balega, Beachbody apparel and footwear, CEP, Crocs, Darn Tough, EleVen by Venus Williams, Falke, Fjällräven, OOFOS, Reebok, Ryka, Skechers, Soffe, Superfeet, Trigger-Point, Turner Footwear, Tyr and Zensah.**

“Our participating brands represent a curated selection of vendors that reflect where the active marketplace is today and more importantly where it’s going in the future,” said **Mark Sullivan**, president of Formula 4 Media, which is producing the show.

The trade show will also include a number of interactive educational exhibits, including the **Bra Fitting Salon** where retailers can learn proper bra fitting techniques as well as display and merchandising techniques they can bring back to their stores. The Bra Fitting salon will feature brand experts from **Handful, Enell, Falke, Shock Absorber, Zensah** and **Anita** and will be designed and managed by **3 Dots Design**, one of the top retail design firms in the sports specialty business.

Holly Wiese and **Andy Davis** of 3 Dots will conduct two seminars in the Bra Fitting Salon on Wednesday, June 14: “Merchandising to your female customers and keeping them coming back for more” and “Displaying sports bras so they look good



Above: Apparel styles from Falke, left, and Fjällräven, right.

forecaster **Haysun Hahn** of Fast Forward Trending will present “Sport, Life, Style!”

“These three words are the defining elements in the modern wardrobe. Consumers want the performance of sport products, life affirming brand values, with a high dose of style that will allow them to stay mobile as they go through their busy day,” Hahn said.

Her presentation will take place at 8:00 a.m. in Rooms 113-114 in the Fort Lauderdale Convention Center.

Sportstyle is owned and produced by Formula 4 Media, publishers of this magazine and the highly acclaimed The Running Event trade show and conference for the run specialty business. ●

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Any company interested in exhibiting should contact Troy Leonard at tleonard@formula4media.com or Jeff Nott at jnott@formula4media.com



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THE FOOTWEAR EYE

DESIGN

Puma's New Soccer Technology



PUMA HAS INTRODUCED THE EVOPOWER VIGOR, a new soccer “boot” that uses a waterborne polyurethane technology on its upper that the company says improves the performance and feel of the shoe and reduces its environmental footprint by 95 percent. Puma recently launched the first soccer cleat made with Insqin, a waterborne polyurethane technology from Covestro. The materials supplier says the technology allows Puma to use 95 percent less water and 50 percent less energy. The shoe also uses Puma’s Accufoam technology, which consists of three-dimensional, diamond shaped dots called Topaz-Dots, applied on both sides of a spandex upper material. Puma says the design and materials in the boot results in “comfort and outstanding precision when kicking the ball powerfully.”

HOSIERY

Balega Relaunches Footzen Collection

Balega has relaunched its Footzen premium sock collection. The Footzen collection was created specifically for the comfort footwear market, and caters to consumers seeking a non-binding and non-elasticized sock, allowing for easy-on and maximum blood circulation.

Produced in South Africa, Balega’s Footzen socks will feature updated packaging, while retaining its core comfort walkers and crew-length socks. Footzen products are designed to protect the feet from abrasions and irritations without creating extra bulk in the shoe.

A hand-linked toe closure creates a seamless fit to eliminate the risk of blistering while its MedDry moisture system helps to maintain a healthy foot environment. The extra-deep heel cup in all styles ensures a consistent and perfect fit for all day comfort.

To celebrate its return to the comfort market, Implus will donate more than 9000 pairs of its Footzen socks to Soles4Souls, which creates sustainable jobs and provides relief through the distribution of shoes and clothing around the world. Since 2006, Soles4Souls has collected and distributed 30 million pairs of new and gently used shoes to individuals in 127 countries and all 50 states in the United States. In 2016 alone, the organization estimates Soles4Souls generated more than \$20 million in economic impact worldwide. ●



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LISTEN IN

Podcast Chat with Altra's Brian Beckstead

Altra is partnering with Utah State University, the first U.S. institution of higher learning to offer a degree in outdoor design. Altra will sponsor the USU campus sewing and design lab, which has been renamed the "Altra Running Lab."

The state-of-the-art lab at Utah State aims to bring together industry and education to better train students for competitive design and development jobs in the outdoor industry. USU's Outdoor Product Design and Development (OPDD) program provides students specific skills to work in product design positions in the outdoor industry.

Altra execs will have an advisory role in advising faculty to ensure that curriculum is tailored to teach students the needed skills and knowledge to make a strong impact in the outdoor industry. Altra will also create internship opportunities for students to get outdoor product design experience. The brand will also play an active role in students' learning by providing design challenges each year.

Listen to Brian Beckstead, Altra co-founder and president, discuss the brand and the new partnership in a recent podcast with *Sports Insight Extra* (see link below). ●



Listen to *Sports Insight Extra* podcasts here:
sportsinsightextra.com/podcast.html

COMING SOON

Salomon To Make Customizable Footwear



Salomon is launching its custom footwear program in Europe this June.

Custom running shoes for the masses? Salomon says it is on its way to offering just that with the launch of its S/LAB ME:sh range of running footwear. The customizable process will be available in Belgium and France beginning in June, with U.S. and other global launches planned for the future.

The goal of Salomon S/LAB ME:sh footwear is to deliver a shoe that is built around the foot of the individual, based on his or her own unique way of moving and the environment in which that person runs. The process is similar to what the brand does when it makes custom footwear for its elite sponsored athletes. The customized S/LAB ME:sh running shoes will be produced locally, in the home market of the end consumer, with a robotic and manual process.

Each ME:sh shoe will use 12 components versus a current average of 50. Additionally, rather than cutting many pieces of textile to create the upper, shoes will be made from a sock-like component called Twinskin that is knit in 3D. The Twinskin takes the shape of a shoe upper through a patented, Salomon-designed process. The fully custom 3D knit uppers on the shoes will be able to be combined with thousands of possible combinations of custom midsole and outsole builds and colorways.

Salomon has constructed a new S/LAB ME:sh Unit at the company's global headquarters, the Annecy Design Center (ADC) in the French Alps. ●



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THE FOOTWEAR EYE



Left: Danner's \$200 Vertigo boot features a leather upper, a Gore-Tex lining and a springy Vibram SPE midsole. Right: Timberland's Spring '18 Altimeter, \$130, has a mesh and leather upper.

TRENDS Outdoor Fusion



A great pair of boots is a wardrobe staple. That's true if you're a mountaineer, a hiker or just a city-dwelling fan of classic dressing. Bootmakers are bringing those worlds even closer together for Fall '17 and Spring '18. Outdoor lines are full of performance-oriented looks that don't skimp on style. Here are two standout styles, from Danner and Timberland, for the seasons ahead. ●

ENDORSEMENT

Big Papi Is Back in Play



Skechers has added a retired Boston baseball star to its portfolio of sports legends who endorse the brand. Dominican-American David Ortiz, known affectionately as "Big Papi," will be featured in a multi-platform global platform marketing campaign this fall for Skechers men's footwear. He joins the likes of retired stars including Pete Rose, Joe Namath, Wayne Gretzky and Kareem Abdul-Jabbar in pitching the brand

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SOCKS

Knit in America

IF ONE IS LOOKING FOR AN AMERICAN STRONGHOLD IN MANUFACTURING, hosiery mills would be a good place to start. Third generation companies such as Darn Tough in Vermont, The Sock Factory in North Carolina, Wigwam Wills in Wisconsin and Fox River in Iowa are using modern technology and making premium-priced product. Farm To Feet claims a 100 percent USA supply chain starting with American-grown wool and U.S.-made nylon and elastic all the way through to the paper and inks used in packaging. Make America Great Again? Sock manufacturers never stopped making it great and making it here. ●

DARN TOUGH

The brand's new over the calf Vertex running styles are light-weight, with minimal-to-no padding. Company director of design and development Lyn Feinson says the Vertex offerings are so light you might forget you're wearing them. "Superior wicking and ventilation means these socks perform well in all weather conditions while their performance fit keeps slipping, blisters and hot spots at bay." New for Fall 2017, a graduated light compression knee-high style for women.

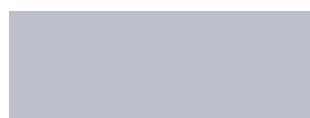


FITSOK

The grandparents of Nathan and Michael Banks started the family in the hosiery trade by pairing socks in their kitchen. The brothers took over the business 10 years ago and have transformed the contract manufacturer into a branded house with the acquisition of Fitsok last fall, and the start-up of William Tucker dress socks and Crazy Compression for the medical market. The Sock Factory now runs 55 knitting machines in-house and sells its compression socks at \$50 a pair.

FARM TO FEET

Max Patch is a popular day hike destination on the Appalachian Trail due to its proximity to Asheville and its 360 degree views. The Farm to Feet Max Patch 3/4 crew sock features an infinite loop of mountain tops around the ankle, much like you'd see from Max Patch's grassy summit. The Max Patch is part of the Farm to Feet Appalachian Trail collection, which is expanding for Spring 2018 and will also include the new Harper's Ferry, which features the AT logo, and the popular Damascus in all its various heights and weights.



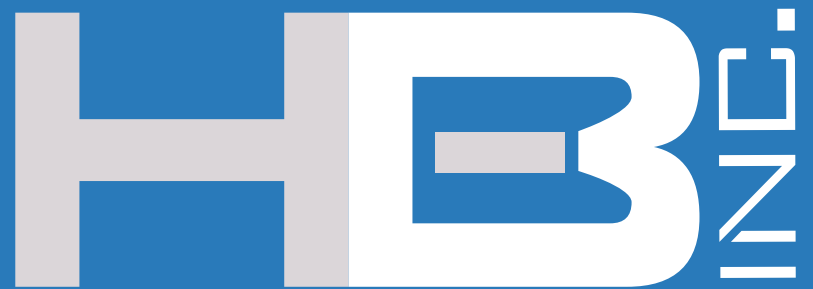
SWIFTWICK

Swiftwick, which has been making all of its socks in the U.S. since it was founded in 2008, has introduced the Vision American Spirit style in both its Five (crew) and One (ankle) heights. To celebrate its Made in USA commitment, the company has combined patriotic designs with its Contoured Compression Fit and Fiber First Moisture Wicking to create what it says is "blister free dry performance." The American Spirit will be begin shipping to stores in early June in plenty of time for Independence Day.



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PROFILE

KingMe



By Jennifer Ernst Beaudry

Seeing the Three Stripes everywhere? You're not alone. 2016 was good for Adidas, especially in the U.S. Sales were up and the brand's styles are all over Instagram, all over the blogs, all over the streets.

"They've gotten their game back and they have a couple high-profile shoes that have done very well," analyst Susan Anderson, of FBR & Co., says. "People have noticed. They've become ubiquitous."

Or as Jason Faustino, co-owner and creative director of the Extra Butter sneaker shops based in New York, puts it, "It feels like everyone's in Adidas — and everyone is."

But Mark King, president of the German athletic giant's North American division, says there's a long way to go.

"Where we are as a brand in North

Adidas America is riding high, but there's a long way to go. Good thing Mark King has a plan.

America, which is somewhere in the range of seven to eight percent [market share] — yeah, it's better than when we were at three or four percent, but we've got much bigger aspirations than that," King tells *Footwear Insight*.

And it's not just on sneaker blogs, in magazine spreads and on Instagram that the brand is heating up.

According to data from the NPD Group, Adidas ended 2016 with 7.4 percent market share in the U.S., which represented growth of a staggering 75 percent. And the Herzogenaurach, Germany-based brand has undoubtedly added some share since. For the first quarter of fiscal 2017, sales in North America were up 36 percent for the Adidas brand, driven by a nine percent lift in performance and an eye-popping 73 percent lift in lifestyle.

There's no denying the progress since Adidas' growth outpaces the general athletic market by a huge margin. As Adidas CEO Kasper Rørsted noted on the brand's

call with analysts following its Q1 earnings release in early May, the stunning growth numbers are partially a function of the brand's small market share in the U.S. But, he added, the brand is continuing to guide for double-digit growth in the American market this year and going forward.

King says Adidas hasn't publicly put a target on how much U.S. business they think they can have — at least not beyond, "a lot more."

"Kasper said, 'I'm pleased with progress, but I'm not satisfied with where we are,' and that's the perfect rallying cry — we've turned the corner, we've got momentum, but guys, we've got a long way to go," King notes. "Let's stay hungry and humble, there's a lot of work to go."

Retailers have been bullish about the re-energized brand.

Foot Locker CEO Dick Johnson name-checked styles including Boost, AlphaBounce, Yeezy and Tubular in the retailer's Q4 earnings call in February, and

said the brand “led the [footwear] category’s growth.” Dick’s Sporting Goods president and CEO Ed Stack commented, “You’ll see a much bigger Adidas presence in the footwear decks now with how we’re positioning that brand,” on the retailer’s own Q4 call.

The effect has been even more pronounced at the boutique level.

Extra Butter’s Faustino says that demand for the styles comes from across the spectrum and across the product line — kids in the retailer’s Lower East Side location looking for UltraBoost and NMDs, their moms at their Long Island door checking out the Superstar and Stan Smith and vice versa.

“Two years ago, I would have never had to look at the numbers, I could just tell you — they weren’t one of our top brands. Today, I can tell you without looking: they’re our number one brand.”

But their recent gains still leave the brand as an underdog.

NPD’s Matt Powell tweeted last month that Adidas’s Superstar was the top-selling shoe in dollars in 2016, but six of the remaining 10 best-sellers were Nike styles — and the other three were Nike-owned Jordan and Converse.

“This is hand-to-hand combat with Nike,” Canaccord Genuity analyst Camilo Lyons says. Continuing to grow in the U.S., he says, means taking share from the market’s 800-pound gorilla. But it’s possible. “They’re muscling their way in.”

Analyst Jonathan Komp of Robert W. Baird and Co. says that globally the brand enjoys share in the mid-teens, meaning the Three Stripes could more than double its piece of the U.S. pie and still not hit their global average. “The potential, especially in North America, is still pretty wide open,” he notes.

The playbook to tap that potential? King says it’s getting the product right and getting it in the right doors — and above all, listening to the end user.

King took over the top spot at Adidas America in 2014 from TaylorMade Golf, where he had been CEO since 2003. His appointment came just as Adidas fell to the number three spot in the U.S. market, behind Under Armour and Nike.

Since then, he has been executing a plan developed by and with the main office to center the American market. In September of that year, the brand hired three of Nike’s most prominent designers to open a Brooklyn design office. (The three — Marc Dolce, Denis Dekovic and Mark Miner — started work Adidas’ Brooklyn Creator Farm in March 2016.) At the same time, it moved its head of HR as well as global creative director Paul Gaudio to Portland from the

“As we look at athletes, we’re looking not in one dimension, but in two. It’s not just on the field and the diamond, it’s half and half, the blending of performance and style. When we stop focusing on the athlete is when we get lost.”



German offices.

And King says the team rethought its entire product cadence.

“We decided we can’t put a silhouette out there and think it’s going to last for six months. We have new franchises and new iterations on almost a monthly basis,” he says. “In a key silhouette like NMD, we might have seven or 10 different drops. If you love that shoe, that’s a reason to buy, and that’s a major change for the way we do things.”

The ability of the brand to build on the in-demand Boost technology by both infusing it into new, retro-inspired looks like the new Iniki as well as developing new families like UltraBoost and AlphaBounce is a strategic advantage in the current trend cycle, where lifestyle looks rule.

“They’re more focused in their design now, not just relying on Stan Smith or their storied or iconic silhouettes, but making new products for lifestyle and resonating where Nike isn’t,” says Gerald Flores, editor-in-chief of Complex’s Sole Collector blog.

But King says Adidas is committed to keeping the product line deeply rooted in sport. “As we look at athletes, we’re looking not in one dimension, but in two,” he says. “It’s not just on the field and the diamond, it’s half and half, the blending of performance and style. When we stop focusing on the athlete is when we get lost.”

The other key driver, King says, is a hyper-organized and targeted distribution plan for every style — one that’s been increasingly important given the manufacturing constraints that have limited Boost production and will at least until 2019.

“It’s a tough conversation with the retailer when you have hot product and they don’t have it. But we have a very clear segmentation where product goes based on who it’s built for,” King says. “That discipline will protect those shoes for a longer time.”



Adidas America president Mark King says the brand’s explosive growth is just the beginning.

The brand has also reoriented its consumer outreach, with social media at the center.

“It’s about an emotional connection to our consumers. Our core consumer is somewhere between 15 and 25 years old — I mean, we want to get old people like me wearing them, but connecting with the 15-to-25-year old is how we build our brand,” King says.

King says that’s meant focusing their energy on mobile apps and social media — but, critically, using those tools as a two-way street.

“We’ve put a lot of money into what we call newsrooms, putting out information on minutely-hourly-daily basis on what happens in golf, culture, baseball, basketball,” he says. “We’re communicating, but also listening — that’s what a lot of people overlook. The whole social media thing isn’t just about putting things out, it’s about listening. We’re doing a good job on listening.”

Komp says the changes have made a big difference.

“They have much better product and a much better connection with their core consumer, and that’s the driver of all the benefits we’ve seen,” he notes.

Lyons agrees.

“Adidas has been one of the brands that has really gotten the changing marketing landscape and how to connect with the consumer, whether it’s with Instagram, product placement or influencers,” he says. “Their global collaborations with key shoe designers or entertainment figures like [retailer] Kith or Pharrell in limited quantities elevate the desire for the brand.”

In 2017, King says the brand will press forward with some new initiatives.

“The big milestone for us in 2017 is the buildout of a lot more retail spaces,” he says, listing store remodels in New York and Los Angeles as well as new additions. “When we started, it was hard to find an environment that showed our brand and athletes and messages and stories. Now we’re going from, let’s say it was 100 shop-in-shops to our plans to be in 5000.”

The doors, most of which will be in partnership with retailers, will begin rolling out this year. “They’re not all massive, but they’re all environments that display our products and tell our stories,” he says.

And the brand intends to keep executing on the plan it laid out back in 2014.

“The beautiful thing about Adidas now in North America is we have tremendous runway in every category — basketball, running, training, women’s. We have so many growth opportunities,” he says. “We are pleased with the progress we’ve made, and we have a long way to go.” ●

COMFORT DREAMS OF SPRING



WEATHER LIKE WE HAVE ENCOUNTERED IN THE NORTHEAST IN 2017 MAKES one wonder if Spring will ever arrive. But then finally it does and it is glorious, renewing the human spirit and the belief that all things are possible, even selling shoes at full price.

So as Spring gives way to Summer, we offer a preview and some early impressions on Spring 2018.

Comfort styles are getting dressier and that is evident in the early preview we've seen on Spring collections. Spring has always been the casual season where toes and ankles come out to play. But Spring '18 is looking like a more serious dressed-up season. This is reflected in cleaner uppers, sleeker silhouettes and refined details. The overall effect feels like a move forward. Pointy toes, check. Kitten heels, sure, why not? Versatility in styles that can go from day into night — it's all

good. Designers are talking about shoes for "wearing occasions." And those occasions may be as simple as date night or as elaborate as a vacation. Either way "wearing occasions" are "buying occasions" and those possibilities open up merchandising opportunities, too. Stores are already talking about tables and displays with themes like "Beach House," "Long Weekend" or "Date Night." We're in favor of anything that makes it easy for shoppers to dream and especially buy multiple pairs.

There's also a change taking place in the Spring color palette. Saturated brights still work, but we're also seeing some bleached shades that work well in more casual styles such as slip-ons and espadrilles.

Regarding features, Spring styles are stepping it up there. There's an emphasis on overall comfort, not just cushioning. So while we soon will be enjoying summer, we'll always dream of Spring. ●



Dansko Maci Yellow Nubuck

**A FIRST LOOK AT
THE 2018 SEASON**

A full-page photograph of two women standing in front of a vibrant, multi-colored mural. The woman on the left has blonde hair and is wearing a light blue denim jacket over a black top and black leggings, paired with red and yellow sneakers. The woman on the right has dark hair and is wearing a black long-sleeved top with a gathered waist and blue jeans, paired with blue and black sneakers. The mural behind them features large, abstract shapes in yellow, orange, and red, with some faint, stylized text visible on the left side.

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The Vionic White Collection features a variety of cupsole styles.



The Bernie Mev MAXI combines luxurious materials like basket weave and satin in the upper and includes a leather inner sole with memory foam.



Alegria Carina sandal, left, and Alegria Playa in Pewter Patent, below right.





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FOOTWEAR INSIGHT 25

OUR EXCLUSIVE RANKING OF THE TOP 25 ACTIVE LIFESTYLE FOOTWEAR BRANDS

Sorting out how the top U.S. footwear brands, both athletic and casual, fared from a sales perspective has become increasingly difficult given market consolidation, state of the traditional retail market and the different reporting methods used by companies. But *Footwear Insight* gave it a stab for 2016 using public documents and market resources to establish estimated North American sales for 25 top brands. There are six with more than \$1 billion in revenues, led

by the more than \$11.5 billion in aggregate generated by Nike and its Converse brand. Each figure is footnoted with relevant additional information about the sales estimate. All revenues not reported in U.S. dollars were converted to the currency at the average rate for the 12 months ended Dec. 31, 2016 as calculated by OANDA. Also, it should be noted that Nike and Converse have sales figures for the 12 months ended Feb. 28, 2017.

2016 Revenue in U.S. \$Millions			Company			Notes		
	1	NIKE		2	CONVERSE		3	NEW BALANCE
\$9,594			N.A. sales. For 12 months ended Feb. 28, 2017. Up 3.7% y-o-y.			N.A. sales estimate; Total company sales reported at \$3.8 billion.		
\$2,001			N.A. sales. For 12 months ended Feb. 28, 2017.			N.A. sales, up 24% from \$1.604 billion in 2015.		
\$2,000			N.A. sales, up 24% from \$1.604 billion in 2015.			U.S. estimate. Number includes domestic wholesale + \$708 million from U.S. Own Retail.		
	4	ADIDAS		5	SKECHERS			
\$1,982								
\$1,908								

2016 Revenue in U.S. \$Millions			Company			Notes		
	14	BROOKS		15	KEEN		16	SPERRY
\$375			Estimate. Total N.A. revenues estimated at \$500 million.			Worldwide footwear estimate.		
\$350			U.S. sales. Worldwide total revenues of \$415 million.			N.A. Estimate. Reported FY16 global sales at \$512 million vs. \$505 million in FY15.		
	17	COLUMBIA/ SOREL		18	FILA	Fila USA footwear sales as reported by Fila Korea.		
\$324								
\$320								

	6	VANS	\$1,265	U.S. sales, 55% of global \$2.3 billion. Some apparel included.
	7	UGG	\$876	U.S. sales estimate for 12 months ended Dec. 31. Global sales at \$971.4 million.
	8	ASICS	\$873	Changing retail landscape, increased competition impacted FY sales decline.
	9	UNDER ARMOUR	\$798	N.A. Sales. Total global footwear = \$1.01 billion, up 49% y-o-y.
	10	TIMBERLAND	\$756	N.A. sales; \$1.044 billion sales in Rest of World. Includes apparel.
	11	PUMA	\$666	Americas' region estimate footwear only.
	12	REEBOK	\$455	N.A. sales.
	13	CROCS	\$384	U.S. sales. Worldwide revenues of \$1.04 billion.

	19	MERRELL	\$300	U.S. sales. Worldwide total estimated at \$450 million.
	20	ECCO	\$275	Americas' revenues, includes some accessories.
	21	SAUCONY	\$245	Global total is estimated at \$470 million.
	22	ROCKPORT	\$180	N.A. estimate, Rockport brand only; part of Rockport Group family of brands.
	23	WOLVERINE	\$170	N.A. sales. Worldwide total estimated at \$180 million.
	24	TEVA	\$103	U.S. sales estimate for 12 months ended Dec. 31.
	25	MIZUNO	\$96	Revenues for the Americas' region for the FY ended March 31, 2017.

GRANDTOTAL

\$26.646B

Vionic Ventures

By Jennifer Ernst Beaudry

Connie Rishwain wasn't looking for a new brand to lead. But at comfort label Vionic, she's found a new footwear home — and a new mission.

"Vionic is a great story and it has amazing technology," the executive tells *Footwear Insight* in an exclusive interview. "We're trying to create a lifestyle brand. And we're trying to create a year-round

business to deliver great results to our customers and consumers."

Rishwain started as president of the San Rafael, CA-based Vionic Group in August, 2016 ("my first day was at Platform, so, baptized by fire," she notes).

The date was just over a year after she stepped down as president of UGG. In her 20 years at the helm of the Deckers-owned brand, she nurtured the line from a niche label selling sheepskin boots to surfers to a full-line lifestyle brand, taking it from annual sales of \$10 million to annual sales of \$1.5 billion.

New Brand President Connie Rishwain Wants to Take the Comfort Brand to the Next Level.

She had intended to be done with the C-suite after UGG, she says.

"I took a year off, with no intentions of going back to work full-time: I was just going to do board work," she says. But conversations with CEO Chris Gallagher and COO Bruce Campbell about joining the Vionic board soon took a more serious turn and they asked her to sign on full-time. And the potential for the brand — as well as what Rishwain calls a supportive and positive company culture — convinced her to dive back in.

"Chris and Bruce are such great people: I wouldn't have done this if I didn't think that. They're sincere, they have a lot of integrity and they're very upbeat, positive and supportive," she says.

Vionic, which launched as Orthaheel in the U.S. market in 2007, is celebrating its 10th year. (The brand consolidated under the Vionic name in 2014.) And Rishwain says the time is right to target the next level.

"It has a great vision with great product. It's a different time and a different brand, but it's exciting because it's like a blank canvas," she says.

Sales for the brand grew double-digits last year and Vionic is targeting double-digit sales growth again for 2017.

To get there, Rishwain said the brand is tapping opportunities on a few fronts.

"We're predominately Spring, so we're really building Fall more equally," she says. "We have men's, but it's very small. Women's dress and casual is another big opportunity. We're expanding categories active, casual, booties, we have slippers — all of them can grow."

And the brand has retail aspirations as well.

The first dedicated brick-and-mortar location, a venture operated in partnership with Ohio comfort group Lucky Shoes, opened this spring.

"It's a great test for us," Rishwain says.

"It's attracting a different, younger, more fashionable customer," John Luck, president of Lucky Shoes says of the 2200-square-foot dedicated space in Fairlawn, OH, that Lucky Shoes opened in March as the first standalone Vionic door.

"They make a good, consistent product and the customers that like that brand *love* that brand," he says, reeling off an anecdote about one of the shop's

Sales for the brand grew double-digits last year, and Connie Rishwain is targeting double-digit sales growth for Vionic again for 2017.



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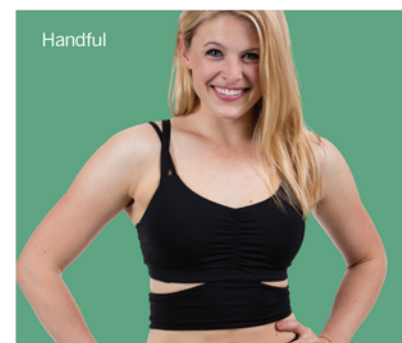
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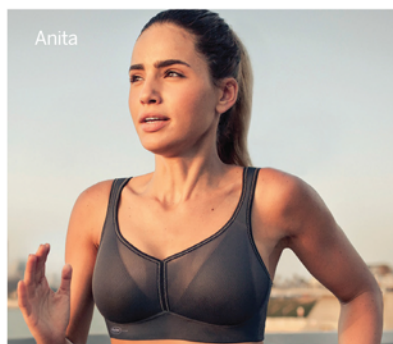


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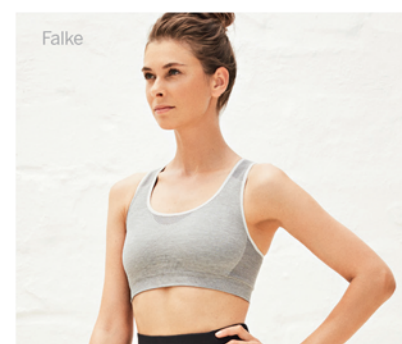


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first customers, a brand fan from New Jersey who did a U-turn on busy West Market Street so she could come in — and bought eight pairs of Vionic Shoes. “It’s not an uncommon story — they’re seeing things in the store that even though they know the brand and love it, they’re surprised it’s so broad, and that there are so many different styles and colors,” Luck says. (And he should know: Luck says even after opening the new door, Lucky Shoes is seeing triple-digit sales increases with the brand in all four of its Lucky locations.)

But the store is just the beginning.

More shop-in-shops, additional SKUs, and even international growth are on the agenda, Rishwain says.

“We have an office in the U.K. and one in Asia and distributors. We’re just starting to get some traction there, so that’s a key opportunity for the brand,” she says.

Here, Rishwain talks about expanding out, the importance of keeping brand DNA front and center and why even today she’s bullish on retail.

After a year away from the footwear world, what tempted you to come back on with a smaller brand?

“After Chris [Gallagher] reached out and wanted me to be on the board, when talked about it and I met Bruce

“Our DNA is delivering what we call moments of joy — we’re a feel-good brand.”

Below: inside the Vionic showroom.



[Campbell], it became much more than that. They’re just amazing guys and they’ve got an amazing culture — very family-like, very much like what I created at UGG. It’s no politics, no bullshit, and with a great vision and a great product. It’s all about great product. We have a great distribution strategy that’s definitely higher-end and not promotional. There’s a lot to build on.”

There’s a lot of concern right now about the U.S. being over-stored — but you’re actually expanding your brick-and-mortar presence. What makes that the right strategy?

“Brick-and-mortar is important. No one is going to go out there and be bullish and say, let’s open 100 stores. But we’ll have some key flagship stores, because where else can the consumer see your key looks? We’ll be rolling out some shop-in-shops. We’ve already got a few with Belk and we’ll do 10 more this Fall with different independents all over the country. It’s obviously very challenging for retail right now.”

You don’t anticipate being affected by the closures?

“There’s so many department stores that have so many locations — older locations, with older leases. But there are a lot of bright spots as well and people are still going to buy apparel and shoes. We’re not a big-ticket item, so we don’t get as affected as big-ticket items do. People will still buy \$100 to \$200 shoes, regardless of the economy.

We have nowhere to go but up, and retail is really driving growth. When you’re resonating with consumers and delivering a strong retail sell-through, that generates more open to buy organically. Vionic is driving consumers into the store, so retailers are looking to grow with us. We have to take advantage of that.”

Vionic has been steadily expanding its fashion offering, including moving into more heeled boots and sandals outside its core comfort styles. Are you looking to attract younger shoppers?

“We have products for all ages — including more mature products that really do well. We’re not going to abandon our original consumer. We want to keep her happy and give her more of an offering. [To support that], for our Spring campaign we’ve really stepped up our advertising in magazines like *O* and *In*

Style and *Southern Living*, as well as some of the more mature publications like *Redbook* and *Women’s Day* to reach our base. And we’ll do it for Fall as well.”

How has that strategy been paying off?

“It’s giving us a lot of exposure. We see a lift in our e-commerce sales and we’re excited about that. Our core consumer is more 40s and 50s; we try to go a little younger to hit that sweet spot of the 30-to-50 year old. We resonate with the *Redbook/Women’s Day* reader. But we started with *O* last year, and they’ve been amazing. We’ve gotten some editorial and we were on Oprah’s Favorite Things list. It doesn’t get better than that.”

At this point, is women’s the focus?

“We have a small men’s line — it’s under 10 percent of the business. We expanded it for Fall ’17 and that’s going to continue for 2018. When women’s grows faster and faster, it gets overshadowed, but that’s a good problem to have. Once I feel like we’ve got enough product, we’re going to do a specific, targeted campaign for men’s as well — more digital, not print.”

As you push into new categories, how do you keep a consistent Vionic identity?

“Every brand needs to remember what their DNA is and be true to it. I was committed to that at UGG. Here I ask, if Vionic was a sneaker, a pump, what would it look like? Our DNA is delivering what we call moments of joy — we’re a feel-good brand. There’s a certain litmus test: We don’t go so crazy or fringe, Vionic can’t come out with three-inch spike heels. You have to be true to who you are. But we can give her a reason to buy another pair. I want to have eight pairs in every women’s closet, that’s what tell my team.”

You started your career at California’s iconic Weinstock’s Department Store. Does that training come in to play?

“When I merchandise the line with the team, I always do it with a retail store in mind, even though they didn’t have one until now. You need a full assortment of shoes as if you were a standalone retailer. That’s how I want to build the line. You have something for all of her end uses. That’s how you get eight pairs. We haven’t even scratched the surface with footwear. I always try to think like a retailer, not a wholesaler — I’ve been a shoe dog my whole life.” ●



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ACTIVITY AGNOSTIC

PERFORMANCE RUNNING BRANDS VENTURE INTO 'ALL DAY' SHOES, BUT DON'T CALL THEM ATHLEISURE. BY JONATHAN BEVERLY

RUNNING SHOES HAVE BEEN

accepted as casual footwear since the 1972 Nike Cortez broke out of the track team's gym bag and appeared on feet in all sorts of settings. Today, the Cortez and similar retro models are the height of sneaker fashion.

Wearing today's performance running shoes in a casual context, however, makes you look like you forgot to change out of your uniform. With their flashy colors, performance-first fabrics and highlighted technological features, running shoes feel more like sporting equipment than apparel. Keeping them on after a run is rather like wearing padded cycling shorts to the coffee shop or knicker-length baseball pants to a post-game lunch.

Activity Agnostic

The problem with these shoes is that they scream, "I'm a runner." The new generation of athletes – Millennials and Gen Zs – eschew such labels. "We're finding that they don't want to be defined as one specific thing," says Brice Newton, senior manager of global footwear at Brooks. "They want to be defined as 'I'm really fit.'" Brooks' new Revel is designed for these consumers, who tend to run a few times a week, but also go to the gym, take classes or join fitness training groups, maybe cycle or play pick-up team sports.

Not only do these athletes not want to be defined by one sport, they'd like their shoes to be able to transition as easily as they do. "The intention is to have one shoe to do everything," says Joe Nguyen, product expert in ASICS' performance running division, on their Road Hawk FF.

Gretchen Weimer, global VP-product for Hoka One One, calls their Hupana, "A cross-over shoe for any activity — running, in the gym or having a beer with your friends."

Companies are using various names to distinguish this shoe category: Performance All Day (Hoka), Life on the Run (Saucony), 24/7 Performance (On), Versatility (Brooks). The core idea is to make clear that these aren't just running shoes — they are activity agnostic, something you can be comfortable in wherever you are, whatever you are doing.

Fashion Forward

Fashion is what first sets these new models apart from other lines in traditional hard-core running brands. Unlike performance running shoes that tend to have flashy colors, aggressive overlays and are plastered with logoed tech callouts,





On Cloud X



Hoka One One Hupana



Brooks Revel

ACTIVITYAGNOSTIC

these models have clean lines, muted colors and fashionable textures. Many have knitted uppers or use mesh with prints that make them look knitted and heathered.

Some brands have to work harder to make their shoes more mainstream. Weimer reports that young people often say, regarding Hoka, “I think I like the brand, but don’t think I can wear those big-midsole shoes.” Their Hupana model has a slightly thinner midsole than many of their models, but also uses a trompe-l’oeil design to de-emphasize the height by visually merging some of the sole with the upper.

Altra’s “footshaped” toe box poses fashion challenges as well, making them look a bit clownish. To counteract this, they wrapped a narrow strip of the outsole up over the tip of toe, visually creating a more stylistic pointed appearance. Combined with the textured knit

upper, they are “shoes you can wear with jeans and not look like a doofus,” says co-founder Golden Harper.

Some brands simply have to simplify to appeal to the new audience. “Younger consumers think our shoes are a little bit bulky and have a lot of components,” says ASICS’ Nguyen. “Millennials are looking for simplicity.”

Performance Matters

Every company, however, wants to make clear that these shoes aren’t traditional “ath-leisure” models that only posture as athletic apparel. Young consumers may not want to look like a run is always imminent, but they still want the performance features that would make one possible, and comfortable, at any time. These models, at heart, are serious running shoes; they’re like elite athletes who look good enough to appear in the swimsuit edition,

not fashion models who appear vaguely athletic.

Caspar Coppetti, one of the founders of the Swiss company, On, says, “We don’t believe in athleisure. We don’t like products that pose as performance products, but are not functional.” Coppetti points out that while its Cloud model may be worn by many for its stylish boating-shoe looks, it is a high-performance piece of equipment that has been worn by athletes winning Olympic medals and international marathons.

Weiner also wants to make clear that Hoka’s fashionable new Hupana model is no less a performance shoe than any of its models. “This is not a lifestyle play,” she says. “The experience is there if you actually run in the shoe.” The Hupana still delivers Hoka’s unique, rolling ride and its light, bouncy responsiveness makes it feel like a shoe you could race in.



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ASICS' Road Hawk FF is similarly light and spry, built with a full-length midsole made from its premium Flight Foam. Altra's Escalante uses its newest, energy-return AltraEgo midsole and is favored by many of its sponsored elites: Jacob Puzey ran a 2:26:52 at the 2017 Boston Marathon in them.

Beyond running, all of these shoes share design elements that add to their activity versatility. They are light and neutral, with no motion-control components getting in the way. Their outsoles tend to have low-profile tread patterns, with full ground contact underfoot for stable, versatile landings.

Like others in the category, Topo's ST-2 is simple and straightforward, a light, fast and flexible shoe. It transitions well to the gym because it has a "responsive platform, protective enough for speed work yet flexible enough to stimulate the foot and lower leg

muscles during gym workouts," says founder Tony Post.

New Customers

Most companies are betting on the new cross-over models bringing new customers to their brands.

"The Revel is intended to appeal to the younger, millennial runner who craves versatility," says Newton, of Brooks. "It is not competing with our core running line. If it does compete and cannibalize other products, we would not have achieved our goal and would be disappointed."

Others echo these sentiments. "Our intention is to attract new, younger consumer who may not have heard of the brand," says Nguyen.

"We think it is a different audience," says Weimer. "People who have seen the brand and are curious about it, but, if they wear their

athletic shoes all day long, can't imagine wearing the [maximal-height] Bondi, for example."

Some companies see the new models appealing to a broad spectrum. "We hoped to dual segment the Escalante," says Harper. "A shoe we could sell to serious runners, but also a shoe we could sell to the Free and Flyknit crowd." To appeal to both of these audiences more clearly, On will make two versions of the Cloud next year, an original, more fashionable Cloud and a Cloud X with a more technical upper.

To attract these new customers, companies are counting on the price point, which hovers around \$100, and the style. They realize that this consumer is probably not coming into specialty retail for a biomechanical fitting, but will likely pick up the shoe for its aesthetics. And that's okay. These athletes tend to run less, so often don't need the specialized features.



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“Companies are realizing they need to start servicing the \$90-100 market,” says Dan Levy, VP-global sales for Skechers Performance. Skechers Performance has been in this space since the beginning. Its GOrun 5 model sits squarely in the category as an award-winning running shoe with a clean, functional design that also looks good when not running.

Specialty, Plus

The majority of brands are sticking with the same distribution channels for their new models as they use for their core running lines: run specialty and sporting goods. While the price point is slightly lower than core running models, these shoes are still high-end products, not suited for “family channel” doors.

While they are looking for customers who may not have often darkened a run specialty door in the past, the brands are counting on the

changing market to bring them in. “We want to attract that young consumer to the brand, but at the same time, run specialty knows they need to attract that young customer to their door as well,” says Nguyen. “The product makes sense for the variety of the consumers that will be shopping at their doors.”

A few companies are tweaking their distribution strategy. Hoka, for example, released the Hupana on its own site first, before shipping to specialty. “We wanted to test if we could get new eyes to brand,” says Weimer. “When product hit, it kind of took off. Within a matter of two months, we started to get the retail interest that we hoped for.”

Altra has been seeing traction for the Escalante in foot comfort, walking and outdoor shops, interest that hasn’t been there for previous road models.

Saucony’s dual approach for its “Life on the

Run” strategy straddles other’s efforts. On one side, it is giving some of its core, high-end, specialty-only models like the Ride and Freedom ISO new materials and color treatments to make them more appealing to this younger audience. On the other end, it has created shoes like the Kineta Relay and Liteform Feel, two models with simple, clean styling and plenty of running heritage, that, at a \$70 price point, are distributed mostly in family footwear and sporting good doors.

Wherever customers find the shoes, and whatever attracts them first, companies are confident that they’ll be pleasantly surprised at the comfort and versatile performance. “Everyday people buy the Cloud first for the looks, then they realize how comfortable it is — exactly because it is performance-based and light,” says Coppetti. “They almost discover its true purpose because they were fooled by the looks.” ●





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FITZHER
FEMALE SPECIFIC SHOE DESIGN

Whole Earth Provision Co. Forges its Own Path

BY AARON H. BIBLE

H

ow can a store stay competitive selling footwear in a market like Austin, TX, surrounded by so many great specialty sporting goods retailers, independent footwear retailers, thriving malls, Tyler's and REI selling similar brands?

It may sound cliché, but for Whole Earth Provision Co., maybe it's the fact that it has remained true to the model, putting all of its

proverbial eggs in the tried-and-true, family-owned, customer-first approach, continuing a hands-on, experiential way of doing business from yesteryear.

After all, they've been doing it for 47 years. According to its founders, the first Whole Earth store opened in December of 1970, about a block from the University of Texas Austin campus, and was so successful the shelves were emptied in less than two weeks.

Some of the unique items that Austinites gobbled up back in those days included bee keeping supplies, geodesic dome model kits, how-to manuals and home-care accoutrements. Hiking and camping equipment, footwear and apparel were soon added to the product assortment and several years later Whole Earth Provision Co. moved into a larger location nearby.

Importantly, Whole Earth Provision Co. has been a leader in Austin's holistic approach to lifestyle, health and wellness for so long that people just trust them when it comes to their purchases, from travel inspiration and camping gear to functional footwear and nature-based toys for the whole family.



C E L E B R A T E S U M M E R

STYLE
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MARINA Pearl White, with
silver flecks on footbed



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SAS San Antonio
Shoemakers

Maintaining the Model

These days, people just love to shop at this iconic store, now eight doors strong, in part due to its unique Gift & Toy department – its largest division – with footwear coming in a strong second, just above general softgoods, in sales volume annually, according to Holland Jones, who literally grew up in the stores.

“I’ve been in the stores since I was in diapers, and working in them since I was old enough to have a job,” Jones says, speaking from Whole Earth’s Austin headquarters, right across the street from its downtown retail location. “We started out inspired by the Whole Earth Catalog and other inspirations – exploring the world, travel, backpacking, bird watching – and we are still inspired by adventure, travel and fun.”

The privately held and family-run business holds its financials close to the chest, but let’s just say they still

WHOLE EARTH PROVISION CO.

Store count: Eight

Store size range: 12,000–20,000-square feet

Locations: Austin, Dallas, Houston, San Antonio and Southlake, TX

Top categories sold: Gifts and Toys; Footwear

Big in Texas: The store carries more than 600 footwear styles, including 100-plus styles of ladies flip-flops alone.

have a very bullish attitude toward the local retail model. And for good reason. “The retail floor is the lifeblood of the business,” says Jones.

The store got its start with specialty items such as local birdwatching guides, gardening books and supplies, and other nature-inspired gifts and useful items. And, customer service, relating to its customer base in a way no one else did at that time. “It’s a treasure hunt, you never know what you’re going to find; mixed with a one-stop-shop,” he says.

Growth came pretty quickly. The second Austin location opened about five years after the first. Several years after that, they opened in Houston, eventually growing to eight stores in five Texas cities: Austin, Dallas, Houston, San Antonio and Southlake. The stores range from 12,000 to 20,000-square feet.

Jones says the chain tries to maintain as much of the same collection across the stores as they can, primarily for consistency in branding. Central buying

and distributing allows for not only efficiencies in purchasing, but inter-store transfers as well. “Everything is weighed against as much continuity across all of our stores as possible,” Jones says.

What’s Working Now

“Birkenstock has been a staple for us since the ’70s, but its recent traction in the world of fashion has driven new and old customers our way, and raised the brand’s sales significantly,” Jones says. “Whole Earth has also supported Chaco from its fruition; the emergence of Chacos on the fashion scene has also given us more exposure. This Spring we’ll offer over 35 styles of Chacos for women and similar numbers for men, the vast majority of which are their technical Z sandal line.”

Women’s footwear buyer Shannon Owens adds, “We are an unrivaled source for comfort footwear, including, but not limited to, Clarks, Born, Earth, Dansk and Keen. To complement our

long-standing classics we love to offer more fashion-driven brands such as Toms, Sanuk, Reef and OluKai. Some of our brands bridge the gap between everyday comfort and off-the-grid adventure.”

“We’re a trusted source for performance footwear as well,” says Owens, “with stand-out styles from Oboz, Salomon, Merrell, Keen, Vasque and Lowa, to name a few. The beauty of our store and model is the ability to offer our customers the latest great idea. We love to support eco-minded brands as well as philanthropic brands, when it makes sense for our assortment.”

Jones says Whole Earth stores stock well over 600 styles (when style and color choices are considered), with their larger stores offering even more. The retailer worked closely with some unique Texas brands that are now



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leaders in the specialty outdoor retail scene since the very beginning, including Yeti, Kammock and Howler Bros.

Continued Owens: "One of the most impressive metrics we continually see is the movement on flip-flops. In Texas, these are staples. In Austin specifically we even have our 'dress' flip-flops... meaning leather flips to wear with your 'nice jeans.' Every year we move thousands of premium flips in all of our markets. Our flip-flop business is year round with the height of our flip business May through July — and we offer over 100 flip-flop styles for ladies alone."

"Along with outdoor recreation and casual customers, we cater to professionals in all workplace environments. From casual offices, to skilled labor, to the restaurant industry and medical fields, we've got them covered," says men's footwear buyer Sean Bibby. "Taking care of our customers while they're at work is what we do."

"When they have the energy to go adventuring on the weekends because of their new work shoes, that's a win for us," Bibby adds.

The Lifeblood of the Business

"Since we hire almost entirely from our sales floor and encourage store

"The beauty of our store and model is the ability to offer our customers the latest great idea. We love to support eco-minded brands as well as philanthropic brands, when it makes sense for our assortment."

The eight-door chain has a strong gift and toy division and also sells more than 600 styles of footwear in its stores.



visits, staff on all levels have a close knowledge of the floor, the store staff, the shopping experience and the customers' needs," continues Jones. "Our operations teams spend much of their time on the road and are in daily com-

munication with the stores. And our owners, some in their 70s, still make it around to each store personally."

At Christmas time, everyone in the company, ownership and senior management included, pitches in and works the retail floor. "Getting out on the floor and helping the customers is probably my favorite time of year," Jones says. "It's always a very reinvigorating type of experience and we come back with a lot of what's working well, what isn't, what needs to be changed, from buyers, to inventory, to customer service models, to merchandising, to everything."

Whole Earth Provision Co. is currently building a new e-commerce platform as well, designed to be competitive with, according to Jones, "any and all competitors or brand sites, yet still reflect the fun and unique experience of shopping at a Whole Earth store."

Staying connected to the business — and the mission of purposeful fun — is what keeps this unique chain of Texas retailers growing year after year, even in the face of an increasingly global economy. "A big part of what we've done since the very beginning, and what we still do, is supporting the communities we're in," says Jones. ●





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Brand Management

By Mark Sullivan

On Running
David Allemann



“On has seen incredible growth globally over the last two years. In the U.S. alone, business has quadrupled. In Europe, market share has surpassed that of many long-standing brands in the specialty run space. Growth has been fueled by a introducing a highly differentiated Swiss technology and brand that introduces a new running sensation. This has driven strong

In their own words, five of the hottest brands in the business share their perspectives on serving retailers, selling online and what the future holds.

word-of-mouth, loyal repeat customers and an engaged community.

When you look at the shoe wall of a retailer, it’s difficult to distinguish the running brands from one another. To be successful, we knew our product would need to offer a unique look. What was originally a weakness – the fact that we had never designed a shoe before – has turned into a strength and major point of differentiation. We try and apply that fresh way of thinking to everything we do, not just product, but customer service marketing and how we treat retailers.

Differentiation is also what powers success in retail. In times of omni-channel availability, location is not the only thing that is relevant anymore.

We’ve added stability and support with the Cloudflyer, neutral cushioning with the Cloudflow, maximum performance and speed with the Cloudflash and a whole new line of trail shoes, all powered by a technology that gives amazing cushioning and support at the right time and place in your stride without the downsides of too much cushioning or motion control.

On’s retail margin is one of the highest in the industry because the stores don’t have a need to price match or discount to move the brand. Our research and development team has taken great care in engineering and designing each season with many models and styles that stay in place for multiple years, so there is no need for clearance.

We have maintained very selective distribution and price stability online as well. We have put a lot of effort and investment in building the brand through digital channels in a premium, non-discounted way. On wants to solely work with platforms that inspire people to run and who educate them about our products. One of our most unique features is that we push traffic to our dealer locator, which allows

visitors to the On website to book a fitting appointment directly with the retailer in their vicinity. In addition, On has just announced a policy that will no longer allow for any On products to be sold on Amazon. This is an effort to further support our specialty run doors and to limit any discounting.” ●

Birkenstock USA
David Kahan



“Last July, we announced we’d no longer sell on Amazon and that decision became effective in January, 2017. Every brand needs to decide where they are on the spectrum of brand equity and how transactional they want their business to be. For some brands, the Amazon platform could make a great deal of sense. For us, not selling there was an easy decision. Any short-term gain would not be worth the long-term impact on the brand.

Retail is becoming ever more challenging. Consolidation, direct-to-consumer, speed-to-market, general socio-political issues. These are all impacting everyone. Still, Birkenstock has far outpaced the market. Data shows



On Cloud X



Birkenstock Sarina

our own direct revenue. We believe with the control we have and disciplined approach all channels can win, including a portion we may do direct to the consumer.” ●

Waldlaufer
Holden Nagelberg



“Consumers are more informed than at any time in history and there is little opportunity left for retailers to succeed simply based on their location and the brands they carry. In a world that offers consumers the ability to shop anywhere at any time, successful retailers are thinking constantly about why customers need to shop in their stores. Along those same lines, our business has been growing steadily because we are concentrating most of our efforts on being the best partners for the retailers who we believe need our products.

Our brand is perfect for sit-and-fit, independent retailers and what these

retailers need most from their partners is disciplined distribution to help insulate them from having to compete based on price. Every one of their customers is holding the best ‘discount finding’ tool ever known to mankind right in their hand as his or her feet are being measured, needs are being discussed, etc. It is our responsibility to do everything possible to make sure that the store that is doing the best job servicing the customer for our brand is also making the sale.

Athletic is influencing everything in casual wear now and the design team in Germany is doing a great job with colors and material interest to make our casual walking shoes look fun and interesting without sacrificing all the great comfort features our consumers are used to.

We recently debuted our Website Revenue Sharing Program, an initiative that allows all of our retailers and wholesale sales team to benefit from our B2C website sales. Whether they want to admit it or not, almost every brand out there is allocating increasing resources towards their vertical strategies. In our eyes, this creates conflict externally with retail partners and internally with the wholesale sales team. A commissioned salesperson sells to a store, a retail salesperson educates the consumer about the value of the products, but much of the effort put into growing the brand’s connection with a consumer will eventually end up with that consumer interfacing with a brand’s B2C website, especially with ‘brand.com’ all over the packaging and marketing materials.

If a sale is made on that site, why should the people that worked hard to create that initial connection be cut out of profiting from the relationship? When we launched our B2C business, we made sure everyone who has helped build our brand gets to benefit. We pay our salespeople their regular commission for any products shipped into their territory and we issue the closest qualified retail partner within 50 miles a 15 percent merchandise credit on the retail price of the sale. To qualify all a retailer needs to do is place a 36-pair pre-season order. Our B2C sales are still much more profitable than a B2B sale, so why not have everyone happily working toward the common goal of growing our brand?

Regarding online sales, we have been extremely careful about who we sell our shoes to and where we allow our shoes to be seen. We’re very excited about our B2C site and its inclusive concept of revenue sharing, so most of our efforts in growing our online presence are concentrated on our own website.”

the overall U.S. footwear market is about flat, we have grown exponentially, all while controlling our distribution. This is a balance we are most proud of since our key retail partners have benefitted tremendously.

We manage our distribution with extreme discipline. We would only open a new point of distribution if it really best served the consumer. Also, we have continued to innovate product. We transformed from a ‘hot item’ into a powerful brand. We have far more than one silhouette that is high demand. It’s been a complete brand revolution rather than an evolution.

Our DNA is our footbed. Our ‘technology’ has not changed and will not change. Why mess with something that has won us millions of fans who swear by the comfort and feel of a Birkenstock? We have expanded our footbed into wedges and closed toe shoes and consumers are loving them. Our shoes and boots sold out virtually to the pair at retail and our wedges have been very encouraging.

For 2018 we will explode these areas and expect that within a few years over 30 percent of our business will be other than sandals — this is while still growing the sandal top line business.

Our retailers are our bullseye. Everything, and I do mean everything, we do is focused on their success. We seek the best service levels and policies that support them. We also invest in marketing with our retailers rather than direct to the consumer so that all actions drive success at retail.

Our online business is growing significantly. Having said that, it is a portion of our strategy and is intended to support the overall market, beyond



Waldlaufer Effie

ANALYSIS

Mephisto Idris and Lissandra



One is the re-introduction of the Mephisto Originals. These were part of the very first group of footwear that Mr. Martin Michaeli, founder of Mephisto, introduced. We have found the acceptance of these to be very strong in the trendy international shops worldwide.

The second is developing our Cork footbed sandal business; our tag line is 'Our cork footbeds are Pure Nature.' We separate ourselves because we make our own cork footbeds at our production facility in Portugal. The trees used to sustainably harvest the cork from, are natural to that area so the process time is very short and no chemicals are required. We add anatomically shaped footbeds with Soft-Air padding and a leather cover.

The third area is the introduction of Nature is Future, our newest eco-product line. The leather is sourced in Germany using a process called Terra Care in the tanning. The natural cork footbeds are made in our Portugal facility. The outsoles are from natural latex and sourced in Europe as well.

We are committed to a MAP and are serious about enforcement. We require our retail partners to submit an Internet Retailer Application and meet important thresholds to be an Authorized Online Mephisto Retailer." ●

Taos
Bill Langrell



"There are a few changes in the past two years that have impacted the retail environment. The biggest is the impact the web is having on retailing. The web has changed the way retailers buy shoes. The days of just picking nice looking shoes are over. In today's environment, the savvy retail buyers are conscious of a brand's ability to protect them from the internet when they are making their

Taos Freedom



product selections. It's difficult to make margin when your shoes are marked down the day they arrive in stores.

Seasonal selling has also gone through changes. The traditional buying calendar does not exist today. For the past few years we have seen sandals sell well into Q3, which is nice for us since the sandal category is one of our strongest.

We recognized early that the internet could be our best friend and at the same time our biggest threat. In response to this we implemented a MAP policy that we take very seriously. MAP pricing is so vital to the well being of the Taos brand and our retail partners that I take personal responsibility to make sure we are diligent in our enforcement efforts. I often hear from our retail partners that they appreciate how hard we work to protect their investment in the Taos brand.

We strive to be great partners and support all of our accounts. The best thing we can do to support our accounts is to make great product that they can sell. We also have a robust stock program that our retail partners get to take advantage of. By our carrying stock, retailers are able to quickly get back into styles that are turning which can be a real difference maker by the end of the season.

We are aggressive in our approach to MAP enforcement. We sweep daily and we do not allow anonymous sellers. Anonymous sellers are the single biggest problem on the web today. These sellers can violate policies with impunity and can erode a brand's equity very quickly if left unchecked. We are bulldogs when it comes to identifying and eliminating these sellers. Effective MAP enforcement does require a significant investment in resources, but it is what the independent retail community needs most from any brand they choose to do business with." ●

Mephisto USA
Mike Crosno

"Driving foot traffic to traditional brick-and-mortar stores continues to be a challenging task. All retailers are trying to find new and creative ways to enhance the in-store experience for consumers to separate themselves from the pack.

We are focused on anything that will help our retail partners and ourselves build a strong, permanent connection with our existing loyal customers, as well as introducing and offering that connection to potential new customers. We are trying to think and act outside the box and our comfort zone. The only off-limits area is price. We have had and maintain an unwavering commitment to full price.

There are three areas that are a worldwide focus.





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1. **Converse** / Chuck Taylor All-Star Platform Metallic, MSRP \$65. 2. **Vans** / Authentic Platform 2.0, MSRP \$60. 3. **Puma** / Basket Platform Pearlized, MSRP \$110.
4. **Puma** / Basket Platform Patent, MSRP \$100. 5. **Supra** / Stacks Vulc II HF, MSRP \$65. 6. **Vans** / Old Skool Platform, MSRP \$65. 7. **Teva** / Zamora Platform, MSRP \$134.95.

A woman with long brown hair, wearing a black beanie with a pom-pom, a grey long-sleeved shirt, a black skirt, and a grey messenger bag, stands at a wooden cafe counter. She is looking down at something on the counter. She is wearing grey knee-high socks with a pink and black geometric pattern at the bottom and black wedge shoes. In the background, there is a coffee machine, a blender, and some potted plants.

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