

# THE STATE OF SNEAKERS



JAN 2022

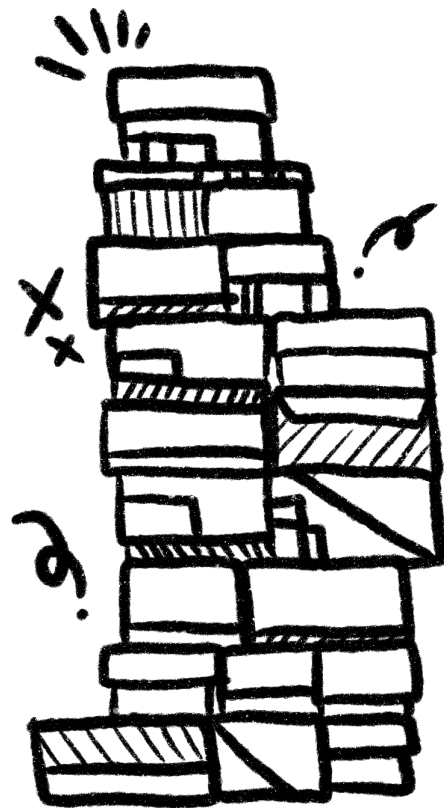
SoleSavvy

VOL. 1

# THE STATE OF SNEAKERS

VOL. 1

This is one of the largest studies done on sneakers and the people who love them. Full methodology is at the back of this document.



## IN THIS WHITE PAPER

- 4 HOW WE GOT HERE
- 7 WHAT DOES IT MEAN TO BE INTO SNEAKERS TODAY?
- 9 THE SNEAKER ENTHUSIAST DEMO & FOUR KEY PERSONAS
- 17 COPPING AND COPING
- 19 THE GOOD, THE BAD, AND THE UGLY
- 22 THE SOLESAVY SOLUTION
- 24 COMMUNITY IN THE BALANCE
- 25 GLOSSARY & METHODOLOGY





MESSAGE FROM

**DEJAN  
PRALICA**

Co-Founder &amp; CEO

I believe we are entering a new era of sneaker culture as we head into 2022. I got my start in the industry in 2011 when releases were primarily in-store and bots were not a concern. There were some incredible releases from 2011-2016 but it was more of the same as always: retros. The space forever changed in 2017 with the introduction of the late Virgil Abloh's "The Ten" from Off-White x Nike. That collection, along with other industry-shifting products like adidas x Yeezy, ushered in a new era of collaborations, demand, and hype for sneakers like we had never seen before. Since then, the last 5 years have felt more like a decade thanks to a pandemic that changed how we live and accelerated eCommerce growth substantially in a short period of time. A lot has transpired in the industry over the last two years of COVID-19, including the rapid growth of the secondary market, an increase of bots, and a decrease in supply and overall fairness to consumers.

More importantly, it's impacted the sneaker community. I am a believer that online communities will define the next decade of the Internet and social media. A silver lining from the pandemic and our time spent indoors is the fact we've all learned to value community and friendships online more than ever before and sneakers are a common interest that we can connect over.

What will the next 5 years hold? That future is to be crafted but to understand what might come next we need to understand how we got here.



SNEAKERS IN 2021 AND

# HOW WE GOT HERE



**O**n November 28, 2021 the worlds of high fashion, streetwear, music, and sneakers were shocked to learn about the passing of designer Virgil Abloh following a two-year private battle with cancer. Abloh served as artistic director of Louis Vuitton's menswear collection, but to those interested in sneakers, he will likely be most remembered for "The Ten." This was the name given to a major collaboration between Nike, Inc. and Abloh's own Off-White brand in 2018.

While most similar collabs might focus on a single model, maybe two, Nike and Abloh released 10 reworked designs from throughout Nike's history and made a major splash on the scene in the process. Along with the rise of Yeezy, adidas's own major partnership with Kanye West, this was a time when sneaker collecting experienced a kind of renaissance, with more interest, enthusiasm and information available than ever before.

That moment led to an increase in collectors, which in turn created more scarcity. A growing resell market began to drive prices for coveted sneakers to previously unseen highs and a new opportunity to cash in on the hype was born. This was also around the time of the rise of StockX, the self-described "stock market of things," which allowed more people to see how much sneakers were worth on the secondary market (and make it easier to buy and sell them).

Buying hyped pairs on release day started to feel impossible, even for seasoned collectors, but it wasn't just because of all the new sneakerheads. The proliferation of bots presented a new challenge as they were able to buy up stock faster than a human could. Though some retailers tried to put measures in place to stop bots, they weren't always successful in keeping sneakers on the feet of those who actually wanted to wear and collect them.





SNEAKERS IN 2021 AND

HOW  
WE  
GOT  
HERE

That was all before 2020 hit.

Though the pandemic saw a rise in online shopping – e-commerce sales grew 3.3x in 2020, according to McKinsey & Company – it also created an increased demand for many products. By now we've all heard the stories of shortages, shipping delays, and the overall supply chain crisis that has affected just about every industry in the world. Though sneakers are obviously not a necessity, the culture around them provides both a hobby and distraction for many.

If you're after a hyped, limited, or sometimes even a general release (GR) pair of sneakers in 2021, these are all the challenges you face, yet there's reason to be optimistic. Like any subculture, there's a community around sneaker collecting and that group can be a huge boon, whether it's helping each other out or just chatting and commiserating about the state of things.

Some platforms, like Shopify, are working closely with retailers to create release processes that circumvent bots, using skill-testing questions, tools like hCaptcha, or even alternate websites that are only revealed at the time of release. Nike's recent collaborations with stores like Union in Los Angeles, and A Ma Manière in Atlanta have used these methods to great success.

The period of sneaker fandom that coincides with the release of The Ten also lines up nicely with the genesis, creation, and evolution of SoleSavy, a community-based platform that brings together sneaker enthusiasts in North America and provides them with the latest intel, tools, and methods to help them buy the sneakers they covet. SoleSavy is well aware of the fight they have on their hands, but it's a fight worth fighting and a fight they believe they can win — for their members and the sneaker community in general.

## ABC'S OF SNEAKERS

BOTS  
AND  
BOTTERS

Bots are custom-coded computer programs designed to cop sneakers in mass quantities. Successful bots are often sold in limited quantities and frequently resold by operators of bots or "botters" via online forums for well above their original purchase price.







# THE FOUR KINDS OF PEOPLE YOU MEET IN SNEAKER CULTURE

- In our research, we identified four key types of people active in sneaker culture. Though there is overlap between the groups, there are elements in each that create unique identifiers:

**S**neakerheads are passionate about almost all aspects of the sneaker/streetwear community and culture. For this group, sneakers are function as well as fashion — whether that function is comfort or more of a if-you-know-you-know nod to fellow sneakerheads — and they proudly wear their shoes. Sneakerheads are typically the most social group and they seek like-minded people who share their interests and hobbies.

- **T**rend Hunters (also known as Hypebeasts) are interested in sneakers because they are a big part of fashion and self-expression, but they don't go as deep into sneaker culture. They are here because they like to have their finger on the pulse of trends as an integral part of their interest in fashion overall.

1

## THE SNEAKERHEAD

Q: What is the best part about collecting sneakers in 2021?



Sneakers are a reflection of who you wanna be, who you believe you are and where you come from.

2

## THE TREND HUNTER



Getting sneakers that fit my personal style, that complete a nice outfit or have comfort or function.



# 3

## THE COLLECTOR

Q: What is the best part about collecting sneakers in 2021?



I really like pulling random shoes out of my collection people have forgotten about or maybe wouldn't think to wear a certain way. Hearing 'you're always pulling up in something fresh that I wouldn't expect' is a huge driving force for me.

Resellers purchase sneakers and sell them for a profit because they realize their value and potential. The act of reselling has long been a part of sneaker collecting, but in this case, we are referring specifically to people whose intent is to use sneakers as an asset, a business and a way to make money, often through nefarious or exploitative means. Many resellers are new to sneaker culture, drawn in by hype and the ease by which they can use technology to flip shoes for a profit. They also likely buy graphics cards, gaming consoles and anything else that might be in low supply and high demand.

Collectors skew a bit older and are interested in the history and story behind their favourite sneakers. Their focus is still on the shoes, but more as artifacts than a fashion accessory. They might consider themselves curators or even protectors of not just sneakers, but of the culture that collects knowledge and information, and are more than willing to share that knowledge with others.



# 4

## THE RESELLER



Being able to put together outfits that complement my shoe.



**B**otters and resellers love to brag about their Ws. The typical image is of someone standing in front of a literal wall of sneaker boxes, brazenly flaunting their haul and throwing it in the face of everyone who took an L. The question remains, however: How successful is botting? Of the people who took our survey, only 5% have gone out of their way to set up and operate a sneaker bot. Of that group, only 10% had some success and only 3% had success that made it seem worthwhile. It is true that botting can be very profitable for some, but startup costs are astronomical, the learning curve is high and there is no foolproof profit method. There's an astoundingly large amount of trial and error involved and just when you finally have things figured out, retailers switch up their bot protection or you lose out to someone with an even more advanced setup.



**Even as a user of bots it's insanely difficult/expensive to acquire shoes.**

It's possible for resellers, especially those running successful bots, to make a tidy profit even if a particular shoe only sells for \$20 or \$50 above retail on the secondary market. The problem for them, comes when a shoe “bricks” and doesn't sell for as much as expected. The reseller is suddenly stuck with a bunch of shoes they have to sit on or sell at a loss (much to the delight of those who see resellers and bots as their biggest enemy).



# TOOLS OF THE RESELLER

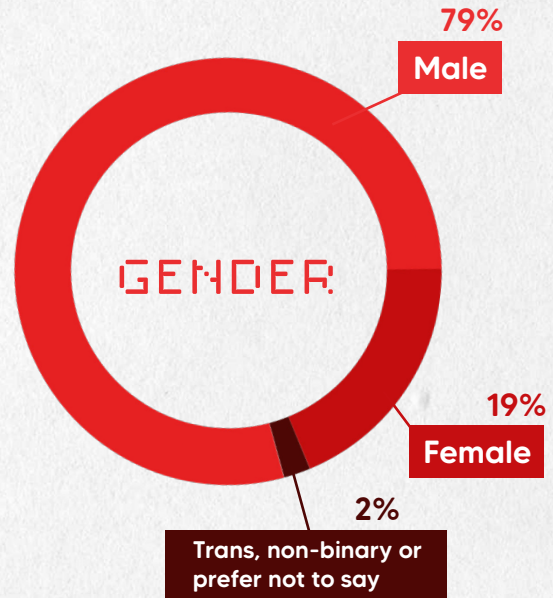
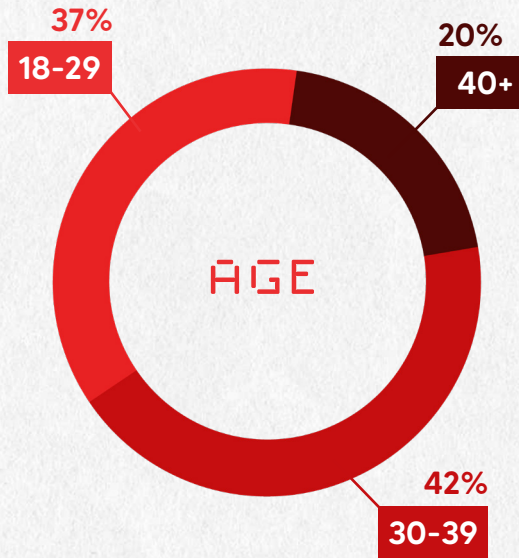
Apart from the limited number of sneakers that are guaranteed to sell far above their eventual resell value before release – the Ben & Jerry's x Nike SB “Chunky Dunky” and Travis Scott collabs come to mind – it is challenging to know if a shoe will be able to make resellers a profit, especially when you factor in shipping costs and the fees charged by platforms like StockX, GOAT and eBay. Many reseller “cook groups” are upping their game, attempting to get information on inventory levels, and stock shortages to forecast supply. But ultimately in the chaos of 2021 supply chain issues, it's even hard for the big brands like Nike and Footlocker to get a clear picture of what is coming when in what quantity. Because everyone is fighting for limited-release products, tensions are high.

Botting has caused a perception issue for retailers and brands across the spectrum of – not just in sneakers, but in everything from gaming consoles to prime camping locations at national parks. In December, United States Senate Democrats announced the Stopping Grinch Bots Act, a bill intended to stop the scalper market which has been exacerbated through pandemic-impacted supply chain issues.



# The Sneaker Enthusiast Demographic

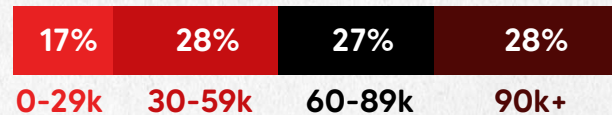
We surveyed over 3,500 people inside and outside of SoleSavy, and this is what we saw.



## EDUCATION



## INCOME



## TOP 10 CITIES

Los Angeles  
Vancouver  
Seattle

Dallas  
Calgary  
Chicago

Toronto  
Houston  
New York

Atlanta

# Brands Power Ranking: 2021

As voted by survey respondents

Which brands got love in 2021?



Which brands lost their shine in 2021?





# WHO DEFINES SNEAKER CULTURE

— In 2022?

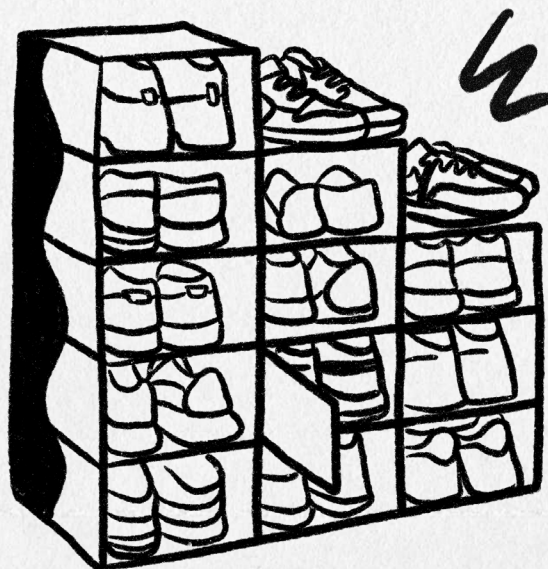
**Y**ou've heard the term sneakerhead, but not everyone into sneakers will call themselves a sneakerhead. Enthusiasts. Collectors. Curators. Resellers. What connects them is a love of sneakers, a passion for their designs, a love for the stories behind them, the thrill they feel when they buy — or “cop” — a coveted pair.

To better understand who comprises this group, you first have to understand sneakers today, especially those made by the biggest brands, like Nike, Adidas and New Balance. There's the inherent cost, and therefore inherent value, but as sneakers become increasingly commodified — and, in many cases, harder to get — that introduces additional value on the secondary market.

The upshot is that sneaker collecting is an expensive hobby and while we might imagine the typical sneakerhead as a teenager working odd jobs to pay for fresh kicks, the data we've collected suggests the majority are highly educated adults with established careers earning higher-than-average incomes.

# 33

The average  
age of today's  
sneaker  
enthusiast



The findings of this study paint the typical sneaker enthusiast as a 33-year-old male with plenty of disposable income. He's well educated, having completed some form of post-secondary education, works in a professional career and lives in a major metropolitan area.

Though our initial snapshot indicates there are more male than female sneaker enthusiasts, other indicators from our research suggest that more females have been getting into sneaker collecting over the last few years. So while the culture as a whole is still predominantly male, female collectors and enthusiasts are becoming more visible and women are creating more spaces for themselves.





Photos of SoleSavy members in the Jordan Community Showcase

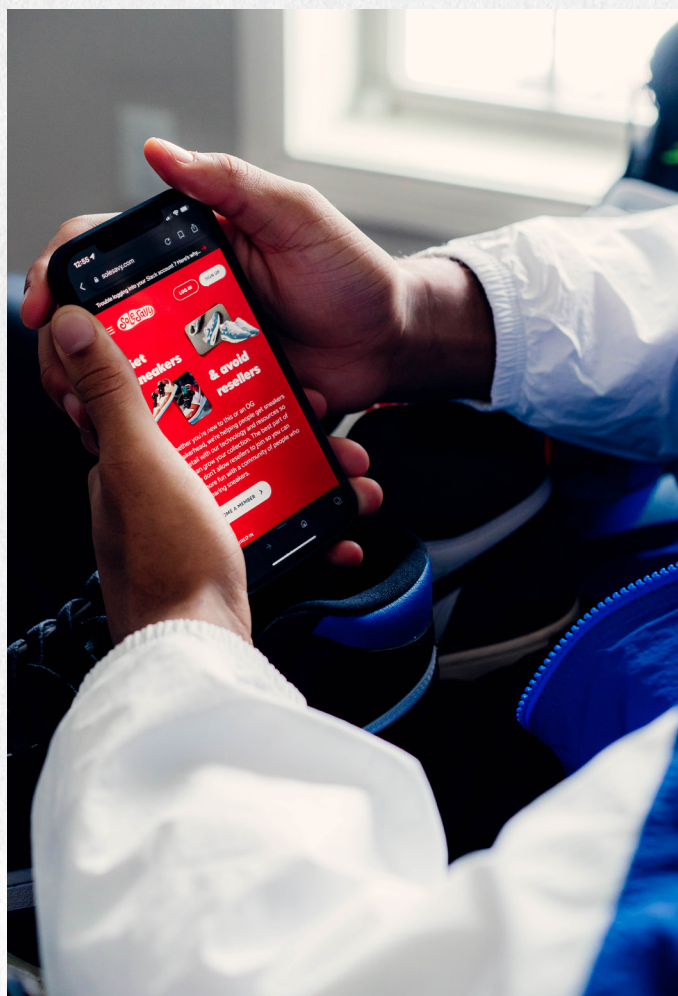


HOW ARE SNEAKER ENTHUSIASTS

# DEFINING SNEAKER CULTURE FOR 2022?



Across our key personas, we see a few overlapping trends that embody the typical sneaker enthusiasts driving the culture in 2022.



## They live in the moment.

What's the latest drop? The newest technology? The hot new collaboration? There's nothing quite like the thrill of a sneaker drop, with everyone furiously trying to cop. But as soon as it's over – whether they took a W or an L – it's onto the next. By the time the sneakers arrive, many have already moved on. Sometimes the dopamine hit of copping is stronger than the thrill of owning the shoes themselves. A 2014 study by the University of Michigan showed that purchasing things you personally enjoy can be up to 40 times more effective at giving you a sense of control than not shopping. In this study, those who actually purchased items were also three times less sad, when compared to those who only browsed.





## HOW ARE SNEAKER ENTHUSIASTS DEFINING SNEAKER CULTURE FOR 2022?

### They're willing, even driven, to stand out.

Some of the biggest and most notable releases in recent memory also push the boundaries of style, materials, and design. Take the Yeezy 450, which looks like a cross between a dumpling and an alien grasping your foot. Or Off-White's interpretation of the Air Jordan 2, which took the aged aesthetic popularized by The Ten to a whole new level.

### The narrative of their style choices is important.

According to a new study from High Snobiety, 85% of their respondents believe that what their clothes represent is just as important as their quality of design. An example of that is the recent Jordan Brand collaborations with James Whitner's sneaker boutique, A Ma Manière. The "Raised by Women" Air Jordan 3 was inspired by Whitner's mother purchasing the sneaker for him at a young age, and his "Burgundy Crush" Air Jordan 1 is a tribute to black culture.

### They're loyal...to a point.

A recent academic study on sneaker culture demonstrated that brand preference evolves "in a manner that serves to reinforce the community's shared interests." A few years ago, New Balance was the domain of "old-heads" and dads BBQing in their backyards, but through their recent collaborations with designers and brands like Salehe Bembury, Joe Freshgoods, Bodega, Aimé Leon Dore, and JJJJound – to name a few – New Balance has made some of the most coveted sneakers around. At the same time, many sneakerheads are growing tired of what they perceive to be oversaturated or lazy designs and releases from their favorite brands. Loyalty doesn't keep them from calling those brands out or trying something new.







Shaedon Sharpe partnership announcement with SoleSavy



HOW ARE SNEAKER ENTHUSIASTS  
DEFINING SNEAKER  
CULTURE FOR 2022?

## WHY DO SNEAKER ENTHUSIASTS ENGAGE IN SUBCULTURE?

The entry point for many sneaker enthusiasts was an interest in professional sports, especially basketball — which makes sense, as one of the biggest brands in the space is Michael Jordan's own Jordan Brand, a Nike subsidiary. For many, retro basketball sneakers are the focal point of their collections, and retros of the Air Jordan 1's are consistently some of the biggest releases of the year.

A lot of sneaker enthusiasts tie their taste to nostalgia, like the shoes their favourite player wore during key moments, so their engagement with sneaker culture has a strong element of history and storytelling. A shoe isn't just a shoe; it becomes a symbol and a reminder of a person or a time.







Photos from SoleSavy member meetup



SNEAKER CULTURE IS

# DRIVEN BY COMMUNITY

## Sneaker enthusiasts see a lot of positives in spite of the challenges they face.

The most positive elements of the culture are:

1. The sneaker community (64% extremely positive + positive)
2. First come, first served (FCFS) releases (38% extremely positive + positive)
3. Raffle systems (32% extremely positive + positive)
4. Boutique retail stores (not resell shops) (43% extremely positive + positive)
5. Sneaker brands (40% extremely positive + positive)

Outside of the sneaker brands (which are almost balanced between positive and negative sentiment), positive sentiment is moving towards aspects of sneaker culture that people feel level the playing field, where people look out for and help each other. Even raffles, which have become more unfair due to raffle bots, at least give everyone a shot. Sneaker enthusiasts are not naive enough to believe that they can get every shoe they want. All they want is a fair chance.

Someone who is into sneakers is part of the broader sneaker community whether they interact with it or not. Those that do may have been exposed to the toxicity

### ABC'S OF SNEAKERS

## COOK GROUP

A sneaker group or community aimed at helping members "cook," or buy up as many pairs as possible, most often with the intention of reselling them.

that can pop up in Facebook groups and platforms like Reddit. That's a product of general online anonymity, but it also goes back to trust: If you buy a pair of shoes from a random person online, how can you know what you're getting is legit? What can you do about it if not other than to call them out?



## SNEAKER CULTURE IS DRIVEN BY COMMUNITY

Many sneaker enthusiasts want something better. They want to be able to buy the shoes they want at retail. If they want to trade — or are willing to pay resell — they want to know what they're getting is authentic and they'd rather see all of the money go to the other person than a portion going to fees (which can raise the cost for both parties). They want a safe space to share their hobby and passion for sneakers. They want to be able to trust, whether it's in the brands, the retailers or their fellow sneakerheads.

Q: What do you like about your sneaker community?

**"The sneaker community is very tight-knit when you find the right group. Nobody will hate on you for what you have or wear. It's refreshing to see that."**

There's an "us vs. them" and "we're in this together" mentality that comes with being a sneakerhead, especially in 2021, when it can be harder for the average person to buy something they want. One response to the rise of reselling platforms and botting is that many sneakerheads seek each other out to give themselves an edge in copping the sneakers they are after.





# COMMUNITY IS THRIVING ONLINE

Since March 2020, much of our social lives were been disrupted by the ongoing COVID-19 pandemic. Sneaker culture, born out of street culture, was largely performed in the real world – everything from lining up for drops outside of retail stores to getting together at sneaker conventions and other community meet-ups and events. When the world went online, it was not clear initially how sneaker culture would adapt. It turns out that it's adapted well.

83% percent of respondents said they feel at least some connection to the wider sneaker community. That starts online (especially since March 2020), but 60% say it has extended into the real world, with many enthusiasts making actual friends in their chosen forum, social media, or “cook group” (aka online communities run by resellers to ‘take stock’ from big drops).

## Time well spent

Sneaker enthusiasts are currently spending 2–4 hours a day on average interacting with their online community of choice, with more than half saying the sneaker community has gotten stronger and more cohesive during the pandemic.

64% of our respondents say that they find most of their sneaker community now in forums dedicated to sneaker collecting.

The pathways to engaging in online sneaker communities are prevalent - the options are many, and there is no single community or single source of truth for sneaker heads to get all the information they need for a successful cop. In response to the question of where sneakerheads find community in a post-COVID-19 world, 74% use Instagram, 61% are looking at free forums like Reddit, 56% look to sneaker blogs, 49% look to YouTube and 45% belong to private or paid sneaker communities.

Since going online, an important question becomes how strongly affiliated they are to a wider sneaker community, and there is good news here. 53% percent of our respondents feel at least a loose connection to a wider community, whereas 30% feel a strong affinity. Only 9% of respondents report feeling no connection to the wider sneaker community.



Q: How much time do  
you spend with your  
community?

ON AVERAGE

2 to 4

HOURS PER DAY

INTERACTING WITH  
THEIR ONLINE COMMUNITY  
OF CHOICE





SoleSavy member Allison Chu

# COLLECTIONS ARE GROWING

IN SPITE OF CHALLENGES

**M**ost media attention focuses on ultra-limited, high-value sneakers. Brands like Nike have long understood that scarcity drives demand, and there was no shortage of shoes designed to be limited and therefore difficult for most people to cop, such as the Travis Scott x Fragment Air Jordan 1 Highs and Lows.

Despite this, respondents in our study continue to acquire sneakers at a rapid pace. Many sneaker enthusiasts currently have more sneakers than they can possibly wear in a month:

- 38% have 25–75 pairs
- 26% have 75+ pairs



# COLLECTIONS ARE GROWING

IN SPITE OF CHALLENGES

With sneaker brands pumping out so many new releases, collectors have been having a field day:

- 71% are buying at least 1–4 pairs a month, which works out to about 12–48 pairs a year!
- These numbers fluctuate depending on the calendar, with respondents sometimes maxing out at 9 pairs a month.

## What makes a sneaker desirable?

Respondents to our survey cite the following as the most important considerations when buying a new pair of sneakers:

- They want shoes that are aesthetically pleasing and comfortable.
- They're not as concerned about price or functionality.
- They claim not to care about exclusivity and popularity.

At the same time, we found that people put twice as much effort (56% vs. 28%) into a limited release sneaker as they do in a general release (GR) pair. The apparent contradiction can potentially be explained by the fact that people don't want to be perceived as merely chasing clout or the latest trend. Ultimately, it may not be the exclusivity or popularity that draws a person to the shoe, but those aspects lead

53%

say at least half of their collection is comprised of non-limited (GR) sneakers

more people to talk, Tweet and write about a limited pair than a GR. GR releases, on the other hand, can fly under the radar initially, but sometimes still end up being in demand or someone's favorite shoe.

We also found that GR pairs make up the majority of people's collections, with 53% of respondents saying at least half their collection is comprised of non-limited sneakers. That makes sense when you consider that sneakerheads like to keep their favorite or most valuable sneakers in as pristine condition as possible – creases are bad! – and therefore wear them less. GR sneakers are also easier to get and sometimes end up going on sale (patience saves pockets, as they say).

While some say they'd like the brands to make hyped pairs more widely available, there's still no guarantee they'd be able to cop. In the worst scenario (for the brands, at least), they could produce more pairs, but find that there suddenly isn't as much interest, leading to a negative perception of that shoe, the release or the brand itself. As it stands, brands are more than happy to call people's bluff and keep making their biggest releases as limited as they can while keeping the public interested.



# TO WEAR OR NOT TO WEAR

**S**neakerheads wear their shoes, with only 5% of respondents saying they buy shoes specifically to keep in unworn, “deadstock” (DS) condition. Compare this to the typical resellers who are copping sneakers that they often never intend to wear - we see the numbers almost perfectly inverted, when we pull out resellers, only 5% buy shoes to wear!

That doesn’t mean, however, that they don’t have DS pairs laying around:

**70% have unworn sneakers they just haven’t gotten around to wearing yet.**

**56% have some pairs that they are keeping on ice for a special occasion.**

**19% have pairs that they are saving for future trades.**

As soon as a pair gets worn — even once — the after-market value of that sneaker drops dramatically, not unlike buying a new car and driving it off the lot. It also makes it harder to sell, as platforms like StockX only deal in unworn sneakers in their original, undamaged boxes (sometimes, but not always, requiring the seller to also provide any additional items that originally came in the box).

As one respondent put it, “there is so much emphasis on resell, and people seeing sneakers as an investment, it all comes down to truly understanding the reason you are into sneakers in the first place. Are you running a sneaker museum or are you buying sneakers to rock? Me, I’m buying shoes to rock. I don’t pay attention to aftermarket pricing at all.”

The rise in popularity of reselling within the sneaker community does have a negative impact on sneakerheads who collect shoes. “It’s so disproportionately talked about,” said one respondent, “so it’s hard for people to explore what sneakers mean to them.”



# COPPING AND COPING



**T**hough platforms like StockX and GOAT get a lot of attention, high prices and market volatility mean our respondents are becoming more and more immune to the resell game. In spite of the fact that 70% say that buying sneakers for retail has gotten harder in the last year, 48% of our respondents say they are buying fewer sneakers from the resell market than before the pandemic.

Resell platforms are seen by some sneaker enthusiasts as kind of a cheat code that “takes the fun” out of buying sneakers. It takes a lot of work to chase down a pair of sneakers today, with some chasing a grail for months or even years, but for many that contributes to the enjoyment and allure.

## You have to do the work

To cop a hype pair of sneakers, our respondents jump through a huge number of hoops, including:

1. 91% enter numerous raffles

2. 88% attempt to cop at the time of drop

3. 61% use more advanced purchase methods, like pre-carting

4. 51% have lined up at a retail store

5. 17% have camped out overnight

The problem for most sneaker enthusiasts is that those formerly tried-and-true tactics are becoming unreliable, with 76% of our respondents stating they feel like those methods no longer work. Take, for example, entering purchase raffles, a common way for retailers to fairly distribute sneakers. Twenty-four percent of our respondents have not won a single raffle in the last 18 months, even though 65% are entering an average of 5+ raffles for shoes they want to buy.

Another example is pre-carting. Many websites will go into a queue during a high-profile drop, and the faster you can get through that queue, the higher the chance you have of copping.





Many people have figured out that you can put literally anything into your cart and go through the checkout process, and go through the queue before everyone else, and then all you have to do is update your cart and check out the shoes you actually wanted in the first place. Now that so many people pre-cart as a standard process, it is less effective than it used to be.

24% percent of our respondents have not won a single raffle in the last 18 months, even though 65% are entering an average of 5+ raffles for shoes they want to buy.

## What happens when you take an L?

While there's more information than ever available about sneakers and upcoming drops, that information is often scattered and unreliable. There's also a growing amount of negativity in the world of sneakers as it becomes increasingly difficult for the average enthusiast to cop. People are frustrated, which shows up in a wide range of behaviors after taking an L, including:

- 68% have a lingering "bad day"
- 38% impulse purchase ("rage cop just to feel something")

- 29% go directly to a resell platform
- 8% engage in some form of self-destructive behavior

For some sneaker enthusiasts, the frustration from taking Ls spills over into relationships. Twenty percent of respondents ended up in a conflict with a loved one or significant other because of their sneaker collection.

## Who's to blame when you take an L?

There is a lot of confusion around who is responsible when they're unable to buy what they want. Interestingly, sneakerheads don't blame the companies who are making shoes purposely limited and unobtainable to build hype. The

enemy of many sneaker enthusiasts and communities are resellers and botters. 61% blame their coping

issues on resellers, but only 24% blame sneaker brands and only 3% blame retailers.

This could be, at least in part, due to visibility. There is a lot of talk in the community and on sneaker-related blogs about resellers using bots to buy up pairs during releases. On the other side, online platforms like Shopify have been taking steps to make it harder or impossible for bots to work, which in turn leads to

**24%** of respondents have not won a single raffle in the last 18 months



## COPPING AND COPING

“smarter” bots and the dance goes on.

On the whole, there seems to be less coverage about brands creating artificial scarcity, since the limited nature of some sneakers contributes to their hype, and about retailers “backdooring” shoes in large numbers for a profit (which the brands say is forbidden, but in reality can be hard to enforce).

Right or wrong, it comes down to perception, with resellers and botters being an easy target for people’s ire. Love them or hate them, people rely on the brands to make the shoes they want and the retailers to distribute them. (And the dance goes on.)



Q: Who is to blame for copping issues?

61%

blame their copping issues on resellers

blame sneaker brands

24%

3%

blame retailers



# TOP 10 SNEAKERS OF 2021

Here are the 2021 Sneakers of the Year, as voted on by the SoleSavy Community.

1



## **Women's A Ma Manière x Air Jordan 3**

Release Date: 06/10/2021

Retail Price: \$200

Style/Color: DH3434-110

2



## **A Ma Manière x Air Jordan 3**

Release Date: 12/03/2021

Retail Price: \$200

Style/Color: DO7097-100

3



## **Travis Scott x Fragment x Air Jordan 1 Low**

Release Date: 08/13/2021

Retail Price: \$150

Style/Color: DM7866-140

4



## **Parra x Nike SB Dunk Low 'Abstract Art'**

Release Date: 07/31/2021

Retail Price: \$110

Style/Color: DH7696-600

5



## **Air Jordan 1 Retro High OG 'University Blue'**

Release Date: 03/06/2021

Retail Price: \$170

Style/Color: 555088-134

6



## **Air Jordan 1 Retro High OG 'Hyper Royal'**

Release Date: 04/17/2021

Retail Price: \$170

Style/Color: 555088-402

7



## **Patta x Nike Air Max 1 'Monarch'**

Release Date: 10/08/2021

Retail Price: \$160

Style/Color: DH1348-001

8



## **Aime Leon Dore x New Balance 550**

Release Date: 04/16/2021

Retail Price: \$130

Style/Color: BB550A2

9



## **JoeFreshGoods x New Balance 990v3 'Outside Clothes'**

Release Date: 09/10/2021

Retail Price: \$220

Style/Color: M990JG3-37726

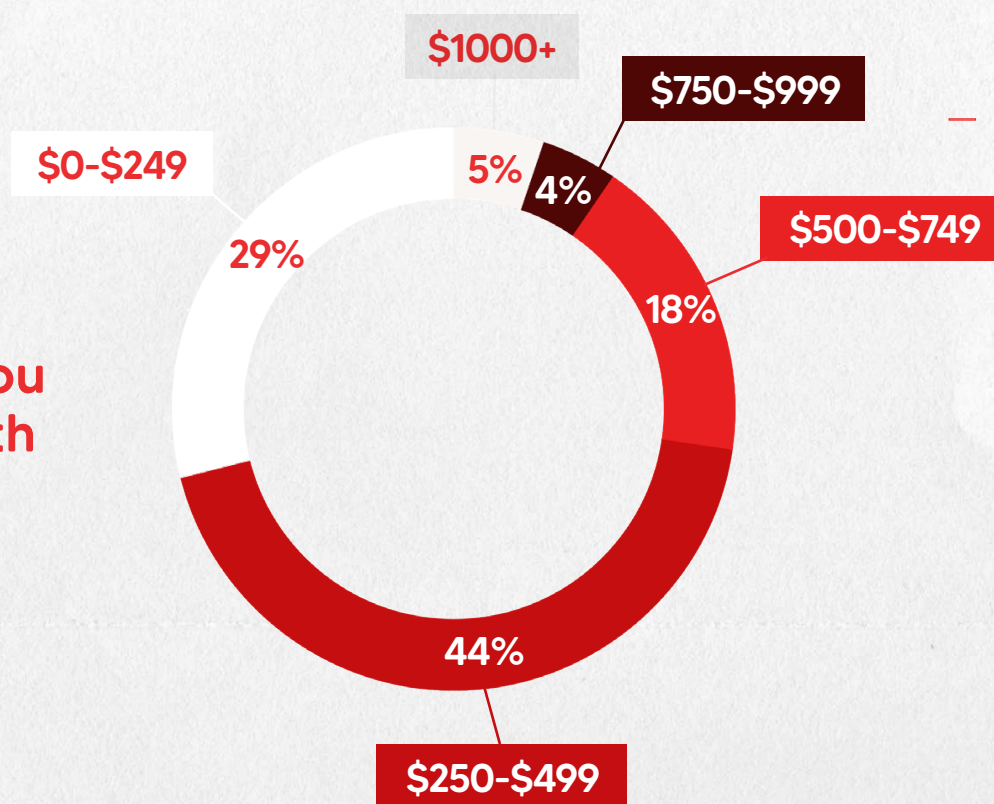
10





# WHERE DOES THE BUDGET COME FROM?

How much do you spend per month on sneakers?



**88%**

Budgeting from primary income

**21%**

Trading up for desired sneakers

**21%**

Credit card debt

**15%**

Flipping single pairs

**2%**

Flipping bulk pairs

How are you funding your sneaker collecting?



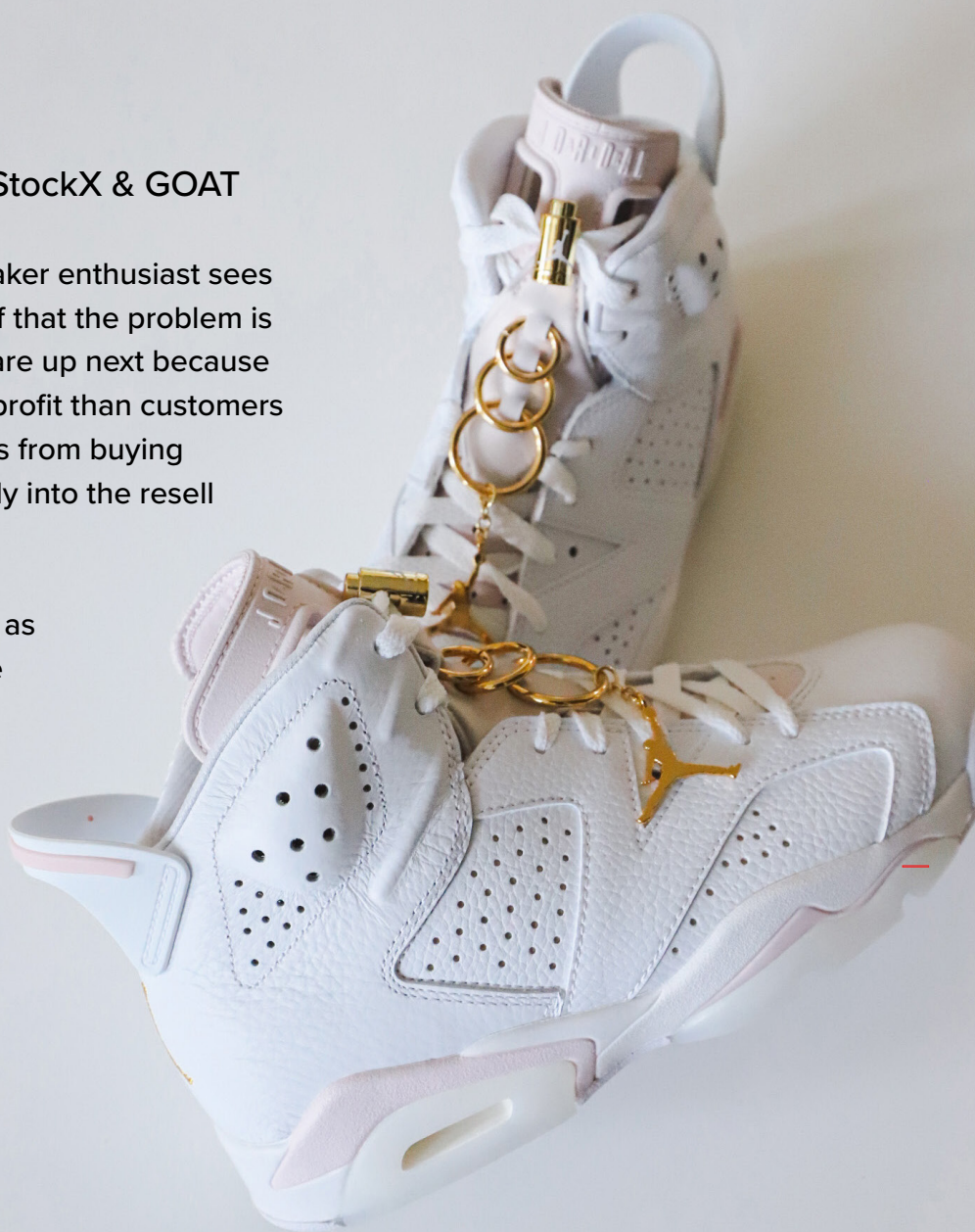
# THE GOOD, THE BAD, AND THE UGLY

**T**echnology and human behavior that tip the scales towards an overall “unfair” advantage for people, so that others can make a profit and exploit the system for financial gain, are almost universally hated. When we asked sneaker enthusiasts how they feel about specific elements in sneaker culture, we found the most negative sentiment towards:

1. 94% — Bots
2. 82% — Resellers
3. 60% — Sneaker retailers
4. 40% — Cook groups
5. 51% — Resale platforms like StockX & GOAT

That makes sense. The common sneaker enthusiast sees shoes selling out quickly, with a belief that the problem is “botters and resellers.” The retailers are up next because most are seen as caring more about profit than customers and not doing enough to prevent bots from buying up their stock, thereby feeding directly into the resell market.

The forums that describe themselves as cook groups are viewed in a negative light, because they are focused on buying as many shoes as possible and are commonly associated with resellers. The resell platforms are the ones that make it all possible, giving resellers a convenient and easy way to “flip” their purchases for a profit.





# THE RISE OF THE FAKES

## AND THE DECAY OF TRUST

**H**igh-end replicas, driven by enthusiasts on social media sites like Reddit (r/rep sneakers has over 500,000 members currently), fill a void for some who have bought into the hype for certain pairs that are impossible to cop for most people. The easy availability of high-end replicas that look almost exactly like – and, in some cases, are virtually indistinguishable from – authentic pairs has caused a lot of concern. No one wants to get ripped off.

The sentiment toward fakes is much softer than the sentiment toward booters. While 48% of sneaker enthusiasts hold negative perceptions about fake sneakers, and 80% refuse to wear them, 52% don't really care, as long as someone isn't trying to pass off a fake as authentic.

The issue comes down to trust. Though StockX and GOAT have built their brands on "legit checking" services to justify high transaction fees, there are numerous examples of fakes passing their authentication process. And because those platforms seem unwilling to acknowledge their fallibility, their response to the problem has been to recommend that people just sell the sneakers again, since they'll obviously pass verification. (It also calls into question what "authentic" even means when fakes are so similar and even rumored to be produced in the same factories as the originals.)



### SPOT THE FAKE

Driven by market demand, supply chain shortages and the rise of botting and high resell prices, 2021 saw a huge spike of interest in replica or "unauthorized authentic" sneakers. The new crop of replica sneakers increased the quality of their production, chasing a 1:1 copy where even the most knowledgeable sneakerheads have a hard time identifying which sneakers are "authentic" and which are "reps."

On this page are a few examples of some of the most commonly legit-checked sneakers in 2021. Can you tell the difference? (Answers below)



With the increased availability of fakes, and the rise of botting, 68% of sneaker enthusiasts report having a low level of trust in the sneaker industry, and 54% have a low level of trust in other members of the sneaker community.

The clear ask from sneaker enthusiasts is for sneaker brands and retailers to intervene, to stop the practice of massively hyping up sneakers that were never made to be available outside a select few and to make the release of sneakers equitable.

Fake: A, D, F, H Retail: B, C, E, G









# GIVING A VOICE TO THE AVERAGE SNEAKERHEAD

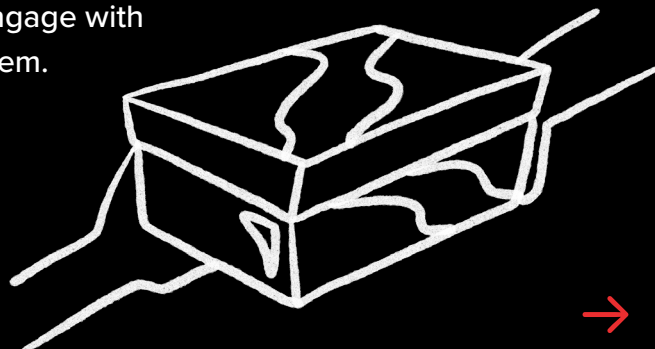


**S**o much of the problem facing sneaker enthusiasts today comes down to a technological disadvantage. People are simply slower than computers and if a retailer's site doesn't have any methods in place to slow down or prevent bots, the average person doesn't have a very good chance to cop. Trying to tip that technological advantage back in the favor of sneaker enthusiasts is a start, but it doesn't stop there.

## There's strength in numbers

In good sneaker communities, the flow of information goes both ways; or rather, it doesn't just come from the top. People are more than happy to share information and tips they've found useful in the past. They share stories about their favorite pairs, with "oldheads" passing on knowledge to a new generation of enthusiasts and collectors.

Regarding the negative aspects of sneaker culture, one person said, "It comes at the expense of the people who value the shoe for more than its monetary value. [Resellers] also cause a lot of the conversation to be reduced to only whether shoes are bricks or not." The value of a shoe to a sneaker enthusiast can come from a number of aspects, whether it's the technology behind it, the memory of their favorite player wearing that pair or the nostalgia of a coveted pair from their youth. Recognizing and acknowledging that value is at the heart of the value sneaker communities of all types provide to those who engage with them.





# GIVING A VOICE TO THE AVERAGE SNEAKERHEAD

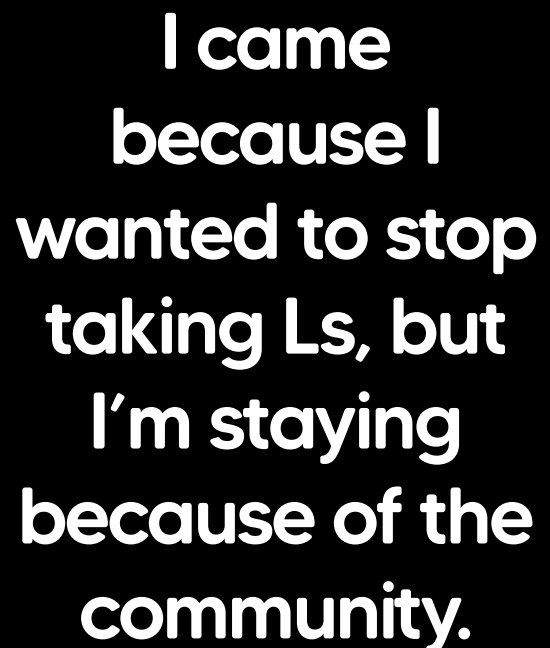
## What role does a paid community like SoleSavy play?

Though SoleSavy does give members the opportunity to purchase some sneakers, it's not a retailer in the traditional sense. Much the same way that the late Zappos Founder and CEO Tony Hsieh described his company as a customer service company that happens to sell shoes, you can think of SoleSavy as an organization that deals in confidence and trust within the sneaker space; confidence that members have the best tools and knowledge available to be able to purchase sneakers they want and trust in each other that they can purchase and trade within the group without fear of getting a fake or otherwise being taken advantage of.

One of SoleSavy's earliest offerings was its various monitor channels that show releases and restocks from various stores in real-time, allowing members to easily click and make a purchase. In its earliest days, that was especially helpful when it came to "shock drops" – releases that weren't announced ahead of time – but with the increase of bots and the overall savviness of other sneaker groups and individuals online, it doesn't offer the same advantage it once did. At least not on its own.

Today, SoleSavy offers complete guides to releases that provide times, dates, stock levels and even detailed tutorials about the best methods to use depending on the release method. The tutorials come in the form of articles, videos, and live cops, where members who are going after the same shoe are on Zoom together at drop time.

SoleSavy creates connections beyond those around sneakers, with people chatting in channels about family, sports, cars, toys, and more. Some of those then spin off into small group chats and even, in some cases, in-person meetups. That is not just allowed, but it's even encouraged by SoleSavy and serves to deepen the trust within the group. People become more than just screen names and avatars. They're real people whose lives you know and care about.



I came  
because I  
wanted to stop  
taking Ls, but  
I'm staying  
because of the  
community.



Even though everyone in SoleSavy is a paying member of the same community, the connections between individuals can feel organic and become genuine. It's not uncommon to see people after a release posting in the #copped channel that they've purchased a retail pair for someone else, even though they could easily flip them for a profit. They've either already been helped by someone else in the group or know they can count on that kind of help in the future (especially helpful since drops sometimes happen in the middle of the night so, depending on your time zone, it's more feasible for some than others).

As we saw with bots, there simply isn't a guaranteed way for everyone to buy every sneaker they want. There will always be more demand than supply (and when it starts to flip, brands have tactics to mitigate that, like creating artificially low stock numbers and subsequently dropping more pairs during "restocks"; we're looking at you, Yeezy). You can see the frustration and even anger in various channels when a drop goes badly or someone just wasn't able to get a pair that means a lot to them. But even there, SoleSavy helps. It's a place to vent and commiserate with people who "get it."

And once that initial negativity dies down, it's on to the next drop.



SoleSavy member K. Lee delivered last year, and so did her membership, copping some Cool Grey XIs





# GLOSSARY

**Backdoor**

To backdoor (aka “backdooring”) is the practice of a store selling its stock of sneakers to friends, family or other special or preferred customers. It is generally perceived as a negative practice, especially when retailers sell the sneakers at a markup and offer multiple pairs to individuals.

**Beaters**

Sneakers worn despite creases, scuffs, stains, and bad smell.

**Bots**

Bots are custom-written computer programs designed to cop sneakers in mass quantities. Successful bots are often sold in limited quantities and frequently resold by operators of Bots or “Botters” via online forums for well above their original purchase price.

**Bred**

Black and red sneakers.

**Brick**

A shoe that is bought explicitly for resell that does not hold its value.

**Clout**

Attention and followers on social media.

**Collab**

A collaboration; a sneaker (or other item) designed and released by two or more brands, usually one of the big sneaker manufacturers and another designer, sports figure or other celebrity, though we’ve also seen collabs with food and toy brands in recent years.

**Colorway/Colourway**

Sometimes abbreviated to CW, is the combination of colors or symbols on a pair of sneakers.

**Cook group**

A sneaker group or community aimed at helping members “cook,” or buy up as many pairs as possible, often with the intention of reselling them.

**Cop**

More than just “successfully purchasing” a shoe, to cop is to successfully cross all hurdles thrown at you when trying to purchase a limited sneaker.

**Drop**

Release of a new sneaker.

**DS**

Deadstock; a pair of sneakers that has never been worn.

**F&F**

Friends and family; limited sneakers made for celebrities to gift to their friends and family, often in high demand.

**FCFS**

First come, first served; a drop the prioritizes the order in which you arrive to buy in person or check-out on a website.

**FSR**

Full-size run; all sizes are produced.

**GR**

General release; shoes made in larger quantities and often readily available after the drop.

**Grail**

A highly desired sneaker.

**Ice**

Sneakers with transparent soles.

**L**

A loss; failure to successfully purchase a pair of sneakers.





**Oldhead**

At this point, a sneakerhead that got into sneakers before 2017.

**Oop**

From “alley-oop” in basketball; to help someone else by buying a pair of sneakers they weren’t able to get and allowing them to purchase them from you at retail.

**Pre-carting**

Going through the checkout process before a drop happens to get through a queue system before all the sneakers sell out.

**Quickstrikes**

Limited edition sneakers and prototypes with a regional early release.

**Rage Cop**

When you take an L on a drop and you buy a different sneaker or item “just to feel something.”

**Raffle**

To mitigate the chaos of hundreds of people trying to purchase a few pairs of sneakers on release day, some retailers will run a raffle, whether in person, online or both. Unlike a traditional raffle, however, what the person wins isn’t the item itself, but instead the opportunity to purchase the sneakers at retail.

**Restock**

A shoe that gets more stock after an initial sell-out.

**Shock drop**

An unexpected sneaker release.

**Sitting**

Referring to sneakers with low demand that are readily available.

**Silhouette**

The outline of a sneaker.

**UA**

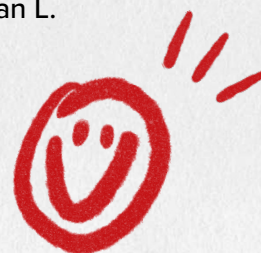
Unauthorized pair; another word for fake.

**VNDS**

Very Near DeadStock sneakers that have been tried or worn once/twice and that look new while maintaining clean, spotless soles and no marks/signs of wear.

**W**

A win, also referred to as a “dub”; winning a raffle or otherwise successfully being able to purchase a pair of sneakers for retail upon release; the opposite of an L.



## The State of Sneakers: Methodology

SoleSavy and Neontaffy collaborated on this ambitious project, a report on one of the biggest ever undertaken in the sneaker space, to better understand the state of North American sneaker culture in 2021. This report is a snapshot of where things stand currently, but as we continue the project, we will start to get a better sense of trends, shifting attitudes and the overall health of the community.

While it’s hard to put a number on the total population of sneakerheads in North America, [Piper Jaffray’s “Taking Stock](#)

[With Teens” survey \(2021\)](#) suggests that 31% of male and 22% of female U.S. teens consider themselves sneaker enthusiasts or collectors.

This report took a mixed methodology approach. To collect the findings presented in this report, we:

- Conducted a survey of 3458 sneaker enthusiasts, collectors and resellers (99% confidence interval +/- 2.2)
- Hosted 5 focus groups with a total of 50 sneaker enthusiasts

- Completed 25 in-depth interviews
- Collected over 500 hours of participant observation in various sneaker forums, subreddits and SoleSavy

Limitations of this mixed-methodology come from a focus on sneaker-enthusiast hangouts vs. reseller hangouts, meaning the population of sneaker enthusiasts we studied leaned closer to people who are into the culture to collect and wear their sneakers vs. those into sneakers from the angle of buying or selling for profit.