Market Insights:
Socks

July 2005
# Table of Contents

**Market Insights: Socks 2005**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Background &amp; Methodology</strong></td>
<td>3</td>
</tr>
<tr>
<td><strong>Executive Summary</strong></td>
<td>5</td>
</tr>
<tr>
<td><strong>Socks Market Overview</strong></td>
<td>8</td>
</tr>
<tr>
<td>• Market Performance</td>
<td></td>
</tr>
<tr>
<td>• Mass Merchant Socks Gap Analysis</td>
<td></td>
</tr>
<tr>
<td>• Channel Trends</td>
<td></td>
</tr>
<tr>
<td><strong>Socks Brand Awareness</strong></td>
<td>17</td>
</tr>
<tr>
<td>• Hot Brands for Athletic Socks (Female and Male)</td>
<td></td>
</tr>
<tr>
<td>• Hot Brands for Fashion Socks (Female and Male)</td>
<td></td>
</tr>
<tr>
<td><strong>Consumer Attitudes Toward Socks</strong></td>
<td>23</td>
</tr>
<tr>
<td><strong>Category Dynamics</strong></td>
<td>28</td>
</tr>
<tr>
<td>• Quantity Purchased - Past 12 Months</td>
<td></td>
</tr>
<tr>
<td>• Sock Purchase Frequency</td>
<td></td>
</tr>
<tr>
<td>• New Sock Features - What’s Hot?</td>
<td></td>
</tr>
<tr>
<td>• Packaging Preferences - ‘Open or Closed’</td>
<td></td>
</tr>
<tr>
<td><strong>Key Insights about Sock Styles</strong></td>
<td>34</td>
</tr>
<tr>
<td>• Share of Sock Styles and Colors Owned</td>
<td></td>
</tr>
<tr>
<td>• Performance Features Owned</td>
<td></td>
</tr>
<tr>
<td>• Styles Purchased</td>
<td></td>
</tr>
<tr>
<td>• Colors Worn by Style</td>
<td></td>
</tr>
<tr>
<td>• Preferred Styles Worn by Activity/Occasion</td>
<td></td>
</tr>
<tr>
<td>• Linking Footwear Types Worn by Sock Style</td>
<td></td>
</tr>
<tr>
<td><strong>Future Purchase Plans for Sock Styles and Colors</strong></td>
<td>45</td>
</tr>
<tr>
<td><strong>Appendices</strong></td>
<td></td>
</tr>
<tr>
<td>A. Consumer Confidence in US Economy</td>
<td>49</td>
</tr>
<tr>
<td>B. Channel Definitions</td>
<td>51</td>
</tr>
<tr>
<td>C. Questionnaire</td>
<td>54</td>
</tr>
<tr>
<td>D. About The NPD Group and NPDFashionworld</td>
<td>69</td>
</tr>
</tbody>
</table>
Background & Methodology

Market Insights: Socks 2005
Background & Methodology

Market Insights: Socks 2005

Background

In 2005, the retail marketplace continues to evolve as retail mergers and consolidations (i.e. Kmart-Sears and Federated-May) are rampant. While the full impact of these mergers has not been felt yet, the expected impact for consumers means more choices for products and brands all at one store. While the one-stop shopping concept is just starting to emerge across the country, consumers will continue to seek bargains and great value as they enhance their family’s wardrobe. The inclusion of Warehouse clubs and Off-Price stores in this report for the first time enables the manufacturer to grasp the importance of these retailers.

While the scope of this report offers consumer feedback for the entire socks category, special emphasis has been placed on Mass Merchants, Wal-Mart specifically, to give readers a sense of what’s driving this critical sector of the marketplace.

To help manufacturers and retailers keep pace with ever-changing consumer behaviors and attitudes, NPD Fashionworld has updated its annual Market Insights: Socks report for 2005.

About Socks Market Insights

This study was conducted via the World Wide Web April 21 to May 2, 2005. The survey was administered to a random sample of self-reported socks purchasers pre-identified from the NPD Fashionworld apparel industry tracking service.

Panel members were asked to visit the NPD Online Research survey site in order to complete and submit the survey about socks. Respondents were initially asked to indicate who in their household, including themselves, they had purchased socks for since January, 2005. Qualified respondents answered the remainder of the survey thinking about either themselves, their spouse, a child under age 13 in their household or a child/other family member age 13+ in their household.

A total of 5,000 e-mails were sent to target panelists, with a total return of 2,419 completed surveys. As an incentive to complete this survey, 10 drawings for $100 were included. Ending sample sizes by age and gender of the sock wearer are as follows:

<table>
<thead>
<tr>
<th>Age of Sock Wearer</th>
<th>Gender of Sock Wearer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total respondents</td>
<td></td>
</tr>
<tr>
<td>Under 18</td>
<td>Male 961</td>
</tr>
<tr>
<td>18-24</td>
<td>Female 1,458</td>
</tr>
<tr>
<td>25-34</td>
<td></td>
</tr>
<tr>
<td>35-44</td>
<td></td>
</tr>
<tr>
<td>45-54</td>
<td></td>
</tr>
<tr>
<td>55+</td>
<td></td>
</tr>
</tbody>
</table>
Executive Summary

Market Insights: Socks 2005
Executive Summary

Market Insights: Socks 2005

**Socks Market Overview**

The total socks market was over 2.4 billion units for 12 Month ending March 2005, down 8% from last year. The sock market reached $3.9 billion down 4% compared to 12 month ending March 2004. Interestingly, fewer units were sold for 12 month ending March 2005 (-3.2%) compared to 12 month ending March 2003, however, the dollar value for those units was 2% greater than the dollar value for 2003. Market sentiment is that the higher average price for this category is driven by greater availability of premium items with enhanced features and not due to individual product price inflation. All wearer segments demonstrated a decline in unit volume of between -7 to -9%.

Socks sales at Mass Merchants mirrored the overall market's performance with declining unit sales. This Mass Merchant decline reached -13%, driven by women's socks down -14%.

**Socks Market Insights 2005 - Key Findings**

Consumers sock drawers are filled with socks.

On par with prior years, consumers report having an average of 20 socks in their drawers. The 25-34 age segment lead the way with 22 pairs of socks. About 1 in 5 buyers shopping for the 25+ age segment believe that this age segment have too many socks in the drawer. Interestingly, the vast majority of sock buyers claim that the wearer owns the right amount. Of the Big 3, Target has done a slightly better job, than Wal-Mart and Kmart, of capturing this age group.

Sock buyers are purchasing socks at the same rate as in prior years. Approximately 1 in 5 sock buyers report purchasing “more often than in the past” continuing to seek value in that purchase.

- Both male and female sock purchasers report buying more socks due to a change in physical/leisure activities.
- Thirteen percent of sock buyers cite a change of occupation was a reason for purchasing more socks.
- Female sock buyers purchase socks for different occasions or moods where as male sock buyers are buying larger packs.

Consumers want affordable, comfortable socks to wear around the house.

Price continues to be the key driver for sock purchase, with comfort at a close second. Price and comfort rate higher in Kmart than in Wal-Mart and Target. With comfort as a main driver, Kmart sock buyers specifically are reporting purchasing socks for lounging or wearing around the house. Also attributing to this purchase behavior is the manufacturer’s emphasis on promotion/displays and demonstrating the sock use within the packaging concept.

New to the 2005 report, 30% of wearers reported experiencing discomfort when wearing socks. The majority of the discomfort is attributed to rubbing at the sock seams, standard sock sizes are too small, and socks not keeping feet warm.

A variety of sock styles among retailers remains important due to the larger number of buyers reporting that they purchase socks depending on the outfit they wear.

- New to the 2005 survey, solid black and solid navy socks are being reported as an important color for the 25+ segment. Solid black is preferred by male wearers while solid navy is preferred by females. Black socks are prevalent to the athletic sock wearer. Manufacturers are starting to evaluate the importance of solid black sock offering and whether or not it should sell at a higher price.
Executive Summary

Market Insights: Socks 2005

Socks Market Insights 2005 - Key Findings

• Once thought to be a fad, there are an increasing number of females owning ankle/quarter, low cut/footie and no show styles than in prior years. Low cut/footie styles have grown considerably among male wearers.

• Crew/cuff styles do not have the same impact on purchase as in the past. Athletic shoe designs could attribute to this trend, due to more low top and 3/4 length styles in the marketplace.

• Grey/Colored Heel/Toe are worn by more male sock wearers than women sock wearers.

• Performance features such as reinforced heel/toe and extra cushioning is not as important to sock buyers as they were in the past.

Does brand awareness equate to brand loyalty?

Socks continue to be a low involvement purchase for apparel. With price as the main purchasing driver, manufacturers continue to struggle with brand equity. Socks sold in non traditional channels such as Warehouse Clubs are causing manufacturers to rely heavily on advertising and marketing to keep their brand in the forefront of the consumers’ mind.

• One in five Wal-Mart sock purchasers report buying the same brand of socks because “it’s a brand I trust” and “as long as it continues to be the least expensive brand of sock available.”

• Brand names were less important to Kmart and Target than in 2004, but are just as important to Wal-Mart.

• Although Kmart buyers are not reporting new brands as a reason for purchase, Basic Editions has captured the attention of both male and female buyers.

Female socks such as Fruit of the Loom, Hanes/Hanes Her Way, Nike, Calvin Klein and Reebok continue to hold top positions in brand awareness for female buyers. For male buyers, Fruit of the Loom, Nike, Champion, Gold Toe, Hanes and Calvin Klein continue to either reclaim or increase their position for brand awareness.

What do consumers plan to do next time?

Although it can be difficult to predict what consumers will ultimately buy the next time they purchase socks for a given wearer, Socks Market Insights 2005 demonstrates future purchase plans for socks are aligned with the attitudes and behaviors of the current purchase behaviors.

Consumers are planning to purchase a variety of styles, colors and patterns on their next outing, regardless of where they make their purchase.

• A higher percentage of low cut and no show styles are expected in future purchasing, even though crew socks remain the preferred style.

• White socks are the color of choice for future purchases, but white socks with colored heel/toes are more likely to be selected for male wearers.

• White with color heel/toes are gaining importance at Wal-Mart, while solid black offerings appeal most to Department store and Kohl’s shoppers.
Socks Market Overview

Market Insights: Socks 2005
Socks Market Overview

**Market Insights: Socks 2005**

For the purposes of this report, the following definitions apply. Men is defined as ages 13+, women ages 12+, boys ages 4-12, and girls ages 4-11.

---

**Sock Performance in the Total Market by Segment**

(Millions of Units)

<table>
<thead>
<tr>
<th>Segment</th>
<th>12ME Mar 03</th>
<th>12ME Mar 04</th>
<th>12ME Mar 05</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men's</td>
<td>1135</td>
<td>1206</td>
<td>1124</td>
</tr>
<tr>
<td>Women's</td>
<td>829</td>
<td>915</td>
<td>842</td>
</tr>
<tr>
<td>Children's</td>
<td>552</td>
<td>518</td>
<td>469</td>
</tr>
</tbody>
</table>

**2004 to 2005 %**

- Total: -8%
- Men: -7%
- Women: -8%
- Children: -9%

For the 12 months ending March 2005 unit sales for Men's socks were down -7% and Women's socks were down -8% compared to prior year. Children's socks experienced a decrease of -9% from 2004.

---

**Sock Performance in Mass Merchants by Segment**

(Millions of Units)

<table>
<thead>
<tr>
<th>Segment</th>
<th>12ME Mar 03</th>
<th>12ME Mar 04</th>
<th>12ME Mar 05</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men's</td>
<td>609</td>
<td>624</td>
<td>557</td>
</tr>
<tr>
<td>Women's</td>
<td>469</td>
<td>509</td>
<td>434</td>
</tr>
<tr>
<td>Children's</td>
<td>366</td>
<td>334</td>
<td>291</td>
</tr>
</tbody>
</table>

**2004 to 2005 %**

- Total: -13%
- Men: -11%
- Women: -15%
- Children: -13%

Total Mass Merchant socks were down 13% for 12 month ending March 2005, compared to a soft performance for 12 month ending March 2004.

Sales for Men's socks declined with a unit volume decrease of -11%. Women's socks shifted from an increase for 12 month ending March 2004, to a double digit decline of -15% for 12 month ending March 2005.

Children’s socks sales followed the same pattern as the other segments, down 13% compared to prior year.

---

Source: NPD Group/ NPD Fashionworld Consumer Data Estimates

Note: Excludes infant/toddlers
As part of the Socks Market Insights report, the following gap analysis of the big 3 Mass retailers (Wal-Mart/ Kmart/Target) versus the Total Mass Market has been conducted to uncover areas of opportunity in gender mix, product mix, style mix and demographic profile mix for both socks manufacturer and retailer consideration.

<table>
<thead>
<tr>
<th>Mass Merchant Socks</th>
<th>Gap Analysis Index</th>
<th>12 Months Ending March 2005</th>
<th>(100=baseline)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Socks</td>
<td>Wal-Mart vs. Total Mass Market</td>
<td>Kmart vs. Total Mass Market</td>
<td>Target vs. Total Mass Market</td>
</tr>
<tr>
<td>(As a % of total Hosiery Mix)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unit Share</td>
<td>97</td>
<td>106</td>
<td>104</td>
</tr>
<tr>
<td>Dollar Share</td>
<td>95</td>
<td>109</td>
<td>103</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender Mix</th>
<th>Unit Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men’s</td>
<td>108</td>
</tr>
<tr>
<td>Women’s</td>
<td>93</td>
</tr>
<tr>
<td>Boys’</td>
<td>97</td>
</tr>
<tr>
<td>Girls’</td>
<td>95</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Socks Product Mix</th>
<th>Unit Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dress</td>
<td>82</td>
</tr>
<tr>
<td>Casual</td>
<td>100</td>
</tr>
<tr>
<td>Athletic</td>
<td>101</td>
</tr>
<tr>
<td>Work</td>
<td>110</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dollar Share</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Dress</td>
<td>83</td>
</tr>
<tr>
<td>Casual</td>
<td>99</td>
</tr>
<tr>
<td>Athletic</td>
<td>103</td>
</tr>
<tr>
<td>Work</td>
<td>106</td>
</tr>
</tbody>
</table>

• In comparison to the overall Mass Merchant market, the big 3 are on par with their sock product mix.

• Kmart’s men’s business is the more developed than its women’s and children’s business.

• Target’s men’s business continues to be under-developed compared to Wal-Mart and Kmart. The women’s business is more developed than its competitors.

• There is an opportunity to improve the children’s business in Kmart. Target’s children’s business is more developed.

• Wal-Mart’s dress sock business is under-developed relative to its competitors.

• Target’s work socks business is under-developed compared to the Wal-Mart and Kmart. This product type is an opportunity for Target.

Source: NPD Group/ NPD Fashionworld Consumer Data Estimates
Socks Market Overview

Market Insights: Socks 2005

While smaller packs are under-developed in Wal-Mart, larger packs (12+) are over-developed.

Target's 10+ pack business is grossly under-developed compared to its competitors, but continues to take the lead in the smaller pack business.

Private label programs at Kmart and Target are well-developed on a unit and dollar basis compared to total mass merchants. As Wal-Mart is heavily represented in National Brands, their private label business remains under-developed.

<table>
<thead>
<tr>
<th>Pack Count</th>
<th>Wal-Mart vs. Total Mass Market</th>
<th>Kmart vs. Total Mass Market</th>
<th>Target vs. Total Mass Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit Share</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Pack</td>
<td>67</td>
<td>81</td>
<td>157</td>
</tr>
<tr>
<td>2 Pack</td>
<td>81</td>
<td>90</td>
<td>152</td>
</tr>
<tr>
<td>3 Pack</td>
<td>75</td>
<td>110</td>
<td>127</td>
</tr>
<tr>
<td>6 Pack</td>
<td>115</td>
<td>100</td>
<td>85</td>
</tr>
<tr>
<td>10 Pack</td>
<td>103</td>
<td>160</td>
<td>40</td>
</tr>
<tr>
<td>12 Pack</td>
<td>166</td>
<td>41</td>
<td>25</td>
</tr>
<tr>
<td>Dollar Share</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Pack</td>
<td>81</td>
<td>94</td>
<td>132</td>
</tr>
<tr>
<td>2 Pack</td>
<td>91</td>
<td>92</td>
<td>148</td>
</tr>
<tr>
<td>3 Pack</td>
<td>88</td>
<td>108</td>
<td>109</td>
</tr>
<tr>
<td>6 Pack</td>
<td>111</td>
<td>101</td>
<td>84</td>
</tr>
<tr>
<td>10 Pack</td>
<td>100</td>
<td>171</td>
<td>62</td>
</tr>
<tr>
<td>12 Pack</td>
<td>147</td>
<td>60</td>
<td>27</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Brand Type Mix</th>
<th>Unit Share</th>
<th>Dollar Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Brands</td>
<td>122</td>
<td>116</td>
</tr>
<tr>
<td>Private Label</td>
<td>77</td>
<td>84</td>
</tr>
</tbody>
</table>

Source: NPD Group/ NPD Fashionworld Consumer Data Estimates
**Socks Market Overview**

**Market Insights: Socks 2005**

### Mass Merchant Socks Gap Analysis Index (100= baseline)

<table>
<thead>
<tr>
<th>Age of Wearer Mix</th>
<th>Wal-Mart vs. Total Mass Market</th>
<th>Kmart vs. Total Mass Market</th>
<th>Target vs. Total Mass Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dollar Share</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Under 13</td>
<td>99</td>
<td>99</td>
<td>102</td>
</tr>
<tr>
<td>13-24</td>
<td>102</td>
<td>91</td>
<td>110</td>
</tr>
<tr>
<td>25-34</td>
<td>96</td>
<td>93</td>
<td>129</td>
</tr>
<tr>
<td>35-54</td>
<td>102</td>
<td>102</td>
<td>91</td>
</tr>
<tr>
<td>55+</td>
<td>99 ([126])</td>
<td></td>
<td>70</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Household Income Mix</th>
<th>Wal-Mart vs. Total Mass Market</th>
<th>Kmart vs. Total Mass Market</th>
<th>Target vs. Total Mass Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dollar Share</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Under $24,999</td>
<td>105</td>
<td>103</td>
<td>60</td>
</tr>
<tr>
<td>$25,000-$49,999</td>
<td>106</td>
<td>97</td>
<td>84</td>
</tr>
<tr>
<td>$50,000-$74,999</td>
<td>97</td>
<td>99</td>
<td>120</td>
</tr>
<tr>
<td>$75,000+</td>
<td>[84]</td>
<td>[101]</td>
<td>[178]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Geographic Region Mix</th>
<th>Wal-Mart vs. Total Mass Market</th>
<th>Kmart vs. Total Mass Market</th>
<th>Target vs. Total Mass Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dollar Share</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>East</td>
<td>100</td>
<td>163</td>
<td>86</td>
</tr>
<tr>
<td>New England</td>
<td>[122]</td>
<td>83</td>
<td>88</td>
</tr>
<tr>
<td>Middle Atlantic</td>
<td>92</td>
<td>192</td>
<td>84</td>
</tr>
<tr>
<td>Central</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E.N. Central</td>
<td>82</td>
<td>123</td>
<td>82</td>
</tr>
<tr>
<td>W.N. Central</td>
<td>[97]</td>
<td>[78]</td>
<td>133</td>
</tr>
<tr>
<td>South</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>South Atlantic</td>
<td>108</td>
<td>104</td>
<td>104</td>
</tr>
<tr>
<td>E.S. Central</td>
<td>125</td>
<td>93</td>
<td>60</td>
</tr>
<tr>
<td>W.S. Central</td>
<td>139</td>
<td>29</td>
<td>79</td>
</tr>
<tr>
<td>West</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mountain</td>
<td>101</td>
<td>77</td>
<td>120</td>
</tr>
<tr>
<td>Pacific</td>
<td>[74]</td>
<td>82</td>
<td>137</td>
</tr>
</tbody>
</table>

**Source:** NPD Group/ NPD Fashionworld Consumer Data Estimates

- Wal-Mart does a nice job of capturing all age groups in comparison to the total Mass Merchants.
- Kmart has done a better job than Target of capturing the 55+ age group, who increased the amount of money they spent on socks this year.
- In comparison to the total Mass Merchants, Wal-Mart captures all income groups except for the $75,000 group. Target continues as the preferred mass merchant for this income group.
- Even though Wal-Mart has strong positioning in the South and has improved its position in New England in the past couple of years, the Pacific and East North Central regions remain under-developed.
- Kmart’s position in the West North and West South Central regions remain under-developed.
- Target South is still under-developed although the South Atlantic region continues to grow.
Analyzing Socks Market Insights

For the remaining sections of Socks Insights, keep in mind that the sample is based on 2,419 NPD Fashionworld survey respondents. Any reference to percentage of respondents should be analyzed based on this sample and not the entire socks marketplace.
Channel Trends - Sock purchasers continue to prefer Discount Stores

Discount Stores continue to lead the way as the most popular outlet to shop for socks. Interestingly, non-traditional apparel stores including Warehouse Clubs and Dollar Stores have begun to emerge as important channels with an average of 10% of respondents reporting they usually buy socks at these outlets. Given the increased availability of socks at these classes of trade, they have quickly climbed up the ranks to become on par with Specialty stores and individual National Chain stores.

Similar to prior years, buyers who purchase socks for males are more likely to report shopping at Discount Stores, namely Wal-Mart and Target in 2005. Ninety percent of shoppers also prefer to buy socks for those wearers under the age of 18 at Discount stores.

Compared to 2004, more male sock buyers are making purchases at Specialty Stores than in previous years. Furthermore, a higher percentage of female sock buyers report shopping at Dollar Stores. Dollar Stores are also gaining popularity across wearer segments, but especially with the 18-24 set, up 3 percentage points from 2004.

<p>| Stores/Outlets Usually Shopped for Socks Wearer - 2005 (% of Sock Buyers) |</p>
<table>
<thead>
<tr>
<th>Gender of Wearer</th>
<th>Age of Wearer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discount Stores (Net)</td>
<td>77</td>
</tr>
<tr>
<td>Wal-Mart</td>
<td>60</td>
</tr>
<tr>
<td>Target</td>
<td>31</td>
</tr>
<tr>
<td>Kmart</td>
<td>18</td>
</tr>
<tr>
<td>Other Discount Stores</td>
<td>6</td>
</tr>
<tr>
<td>National Chains (Net)</td>
<td>25</td>
</tr>
<tr>
<td>JC Penney</td>
<td>14</td>
</tr>
<tr>
<td>Kohl's</td>
<td>11</td>
</tr>
<tr>
<td>Sears</td>
<td>9</td>
</tr>
<tr>
<td>Mervyn’s</td>
<td>3</td>
</tr>
<tr>
<td>Department Stores</td>
<td>21</td>
</tr>
<tr>
<td>Warehouse Clubs</td>
<td>18</td>
</tr>
<tr>
<td>Off-Price Stores</td>
<td>16</td>
</tr>
<tr>
<td>Specialty Stores</td>
<td>11</td>
</tr>
<tr>
<td>Dollar Stores</td>
<td>9</td>
</tr>
<tr>
<td>Other Outlets</td>
<td>7</td>
</tr>
<tr>
<td>Factory Outlets</td>
<td>6</td>
</tr>
<tr>
<td>Food/Drug Stores</td>
<td>1</td>
</tr>
<tr>
<td>Direct Mail/Catalogs</td>
<td>1</td>
</tr>
</tbody>
</table>
Socks Market Overview

Market Insights: Socks 2005

Stores/Outlets Usually Shop for Socks - 3 Year Trend (% of Sock Buyers)

Discount Stores (Net) 2005: 81% 2004: 85% 2003: 88%
Target 2005: 38% 2004: 40% 2003: 37%
Kmart 2005: 20% 2004: 23% 2003: 26%
Other Discount Stores 2005: 6% 2004: 12% 2003: 16%
National Chains (Net) 2005: 28% 2004: 32% 2003: 30%
Kohl's 2005: 14% 2004: 15% 2003: 13%
Sears 2005: 10% 2004: 9% 2003: 9%
Mervyn's 2005: 3% 2004: 4% 2003: 4%
Department Stores 2005: 19% 2004: 23% 2003: 21%
Factory Outlets 2005: 7% 2004: 10% 2003: 11%
Other 2005: 7% 2004: 12% 2003: 12%
Specialty Stores 2005: 12% 2004: 14% 2003: 14%
Direct Mail/Catalogs 2005: 2% 2004: 2% 2003: 2%
Dollar Stores 2005: 11% 2004: 10% 2003: 11%
Food/Drug Stores 2005: 2% 2004: 3% 2003: 3%
Warehouse Clubs 2005: 13% 2004: 14% 2003: 11%

Note: Dollar Stores and Food/Drug Stores not available for 2003. Off-Price and Warehouse Clubs not available for 2004-2003, were previously tracked in All Other stores.
Consumers are more likely to shop at Discount Stores, Warehouse Clubs and Dollar Stores for socks than other apparel items

Following the one-stop shopping format, consumers are more drawn to Discount, Clubs and Dollar Stores for their sock purchasing. Signaling a propensity towards cross-shopping, National Chain, Department and Specialty Store shoppers are more likely to purchase other apparel items versus socks and prefer to purchase socks at other channels.

Interestingly, Off-Price store shoppers are just about as likely to purchase both socks and most other apparel items at these outlets.
Socks Brand Awareness

Market Insights: Socks 2005
Aided Brand Awareness: Female Athletic and Fashion Socks

Market Insights: Socks 2005

Female Athletic Socks Brand Awareness
For the past three years, the top 5 brands have not changed their awareness ranking for female athletic socks (Hanes/Hanes Her Way, Fruit of the Loom, adidas, Nike and Reebok). Fruit of the Loom and adidas have the same level of awareness (56%) in 2005.

Consumers reported a higher level of awareness for Keds (+3 pts.) in 2005. Other brands seeing a minor increase included Joe Boxer, Puma, Cherokee and Russell. Profiled for the first time in 2005, Kmart’s Basic Editions ranked number 7 with awareness ratings falling right between #6 Champion and #8 Gold Toe.

Female Fashion Socks Brand Awareness
While Hanes/Hanes Her Way and Calvin Klein continued to hold the top two spots in 2005, Basic Editions captured the number three position with 30% awareness levels reported. Profiled for the first time in 2005, Nine West reached the top 20 brands and achieved a 17% awareness level, perhaps driven by the “halo effect” of its established footwear business.

Fruit of the Loom and JC Penney’s St. John’s Bay saw marginal increases in 2005. Of note, several designer brands including Calvin Klein, Polo/Ralph Lauren and Tommy Hilfiger experienced five point drops in aided brand awareness for 2005. Given the impact of retail consolidation at the upper tier department stores, awareness levels of these brands could continue to fall as store private label programs gain in importance.

Male Athletic Socks Brand Awareness
Hanes continued to hold its number one position for male athletic socks with 58% awareness, while adidas held its number two position and its 53% awareness level for 2005. Fruit of the Loom, Nike and Champion rounded out the top 5 brands.

Peds and Gold Toe experienced marginal increases in awareness. For Gold Toe, a heavier focus on men’s athletic socks in its spring advertising campaign may have helped boost its awareness, while Peds could be driven by increased distribution at retail.

Similar to Ladies Athletic socks, Basic Editions made the top 10 brand list with 23% awareness levels.

Male Fashion Socks Brand Awareness
Hanes leaped ahead of Calvin Klein in 2005 to claim the number one position for brand awareness. Calvin Klein was a close second with 1 in 4 respondents citing awareness of this brand on an aided basis. Gold Toe returned to the number three slot, while Dockers dropped down to share the number four position with Fruit of the Loom and Tommy Hilfiger.

Most brands saw awareness levels drop off in 2005. In particular, Calvin Klein dropped 7 points and Dockers fell six percentage points.
Aided Brand Awareness: Female Athletic Socks

Market Insights: Socks 2005

<table>
<thead>
<tr>
<th></th>
<th>2005 Rank</th>
<th>2004 Rank</th>
<th>2003 Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>4</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>6</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>NA</td>
<td>NA</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>7</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>8</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>9</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>10</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>11</td>
<td>NA</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>12</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>13</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>14</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>14</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>21</td>
<td>NA</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>16</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>20</td>
<td>18</td>
<td></td>
</tr>
</tbody>
</table>

% Aware of Brand - Female Athletic Socks
(Among Those Purchasing Socks for Female)

Basic Editions 2005: 30

NA: Brand not asked in that year
## Aided Brand Awareness: Female Fashion Socks

### Market Insights: Socks 2005

<table>
<thead>
<tr>
<th>Rank</th>
<th>2005 Rank</th>
<th>2004 Rank</th>
<th>2003 Rank</th>
<th>% Aware of Brand - Female Fashion Socks (Among Those Purchasing Socks for Female)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Hanes/Hanes Her Way</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>Calvin Klein</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>No Nonsense</td>
</tr>
<tr>
<td>5</td>
<td>6</td>
<td>5</td>
<td>5</td>
<td>Cherokee</td>
</tr>
<tr>
<td>6</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>Disney</td>
</tr>
<tr>
<td>7</td>
<td>6</td>
<td>5</td>
<td>5</td>
<td>Liz Claiborne</td>
</tr>
<tr>
<td>8</td>
<td>6</td>
<td>5</td>
<td>5</td>
<td>Leggs/ear</td>
</tr>
<tr>
<td>9</td>
<td>13</td>
<td>10</td>
<td></td>
<td>Fruit of the Loom</td>
</tr>
<tr>
<td>10</td>
<td>5</td>
<td>9</td>
<td>9</td>
<td>Polo/Ralph Lauren</td>
</tr>
<tr>
<td>11</td>
<td>6</td>
<td>8</td>
<td>8</td>
<td>Old Navy</td>
</tr>
<tr>
<td>14</td>
<td>15</td>
<td>13</td>
<td>13</td>
<td>Faded Glory</td>
</tr>
<tr>
<td>20</td>
<td>18</td>
<td>18</td>
<td>NA</td>
<td>Joe Boxer</td>
</tr>
</tbody>
</table>

NA: Brand not asked in that year
### Market Insights: Socks 2005

#### % Aware of Brand - Male Athletic Socks

(Among Those Purchasing Socks for Male)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Hanes</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>58</td>
<td>58</td>
<td>58</td>
</tr>
<tr>
<td>adidas</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>33</td>
<td>53</td>
<td>53</td>
</tr>
<tr>
<td>Fruit Of The Loom</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>46</td>
<td>52</td>
<td>49</td>
</tr>
<tr>
<td>Nike</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>42</td>
<td>46</td>
<td>46</td>
</tr>
<tr>
<td>Champion</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>35</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>Reebok</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>32</td>
<td>32</td>
<td>30</td>
</tr>
<tr>
<td>Wilson</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>27</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td>Jockey</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>24</td>
<td>28</td>
<td>28</td>
</tr>
<tr>
<td>Basic Editions</td>
<td>9</td>
<td>NA</td>
<td>NA</td>
<td>23</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gold Toe</td>
<td>9</td>
<td>10</td>
<td>9</td>
<td>23</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>Jerzees</td>
<td>11</td>
<td>9</td>
<td>9</td>
<td>21</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Keds</td>
<td>12</td>
<td>10</td>
<td>11</td>
<td>18</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>Old Navy</td>
<td>13</td>
<td>12</td>
<td>13</td>
<td>18</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Puma</td>
<td>14</td>
<td>16</td>
<td>13</td>
<td>17</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Dickies</td>
<td>15</td>
<td>16</td>
<td>13</td>
<td>16</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Joe Boxer</td>
<td>15</td>
<td>12</td>
<td>NA</td>
<td>16</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Tommy/Tommy Hilfiger</td>
<td>15</td>
<td>12</td>
<td>13</td>
<td>16</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Peds</td>
<td>15</td>
<td>20</td>
<td>19</td>
<td>12</td>
<td>16</td>
<td></td>
</tr>
<tr>
<td>Faded Glory</td>
<td>19</td>
<td>12</td>
<td>22</td>
<td>10</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Odor Eaters</td>
<td>20</td>
<td>16</td>
<td>12</td>
<td>13</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Bugle Boy</td>
<td>20</td>
<td>NA</td>
<td>NA</td>
<td>13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dockers</td>
<td>20</td>
<td>20</td>
<td>20</td>
<td>13</td>
<td>14</td>
<td></td>
</tr>
</tbody>
</table>

NA: Brand not asked in that year

---

**Aided Brand Awareness: Male Athletic Socks**

*Behind Every Business Decision*
Aided Brand Awareness: Male Fashion Socks

Market Insights: Socks 2005

% Aware of Brand - Male Fashion Socks
(Among Those Purchasing Socks for Male)

<table>
<thead>
<tr>
<th>2005 Rank</th>
<th>2004 Rank</th>
<th>2003 Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>3</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>4</td>
<td>10</td>
<td>8</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>7</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>8</td>
<td>6</td>
<td>9</td>
</tr>
<tr>
<td>9</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>10</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>11</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>11</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>13</td>
<td>13</td>
<td>15</td>
</tr>
<tr>
<td>14</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>14</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>16</td>
<td>14</td>
<td>13</td>
</tr>
<tr>
<td>17</td>
<td>15</td>
<td>13</td>
</tr>
<tr>
<td>17</td>
<td>16</td>
<td>NA</td>
</tr>
<tr>
<td>19</td>
<td>18</td>
<td>23</td>
</tr>
</tbody>
</table>

NA: Brand not asked in that year

Behind Every Business Decision

NPD Fashionworld® a division of The NPD Group, Inc.

22
Consumer Attitudes

Market Insights: Socks 2005
Comfort leads the way for consumers

As with prior Socks Insights studies, sock purchasers rated comfort ahead of fashion when buying socks at Wal-Mart, Kmart and Target. Interestingly, sock purchasers for the Big 3 mass retailers have reported a higher incidence of purchasing socks specifically for lounging or wearing around the house. This could be attributed to manufacturers placing a heavier marketing emphasis for this type of sock on their packaging/promotions.

Target sock purchasers are clearly more driven by fashion and are more likely to look for socks to coordinate with the outfits and shoes they wear. On the other hand, Wal-Mart shoppers often grab whatever sock is on the top of their drawer when choosing what socks to wear.

Multi-pack socks are still important to Wal-Mart and Kmart sock purchasers, but to a lesser degree than prior years. This could be a signal that consumers are seeking socks in smaller packs.
Wal-Mart sock purchasers continue to be more brand loyal than Kmart and Target purchasers. One in four Wal-Mart sock purchasers report buying the same brand of socks because “It’s a brand I trust,” and as long as it continues to be the least expensive brand of sock available.

Having a vast array of colors available at retail continues to be important as buyers across the big 3 mass retailers report buying more colored socks. In particular, Kmart buyers report more colored socks in their wardrobe than in prior years. Across the three mass retailers, respondents state that they are wearing more black socks for sports or exercise than in 2004. A higher percentage of Wal-Mart and Target buyers cite that socks with colored/grey heels and toes are more comfortable to wear versus 2004.

One in ten consumers are seeking socks that have therapeutic features to be used for foot ailments and for medical necessity. Manufacturers and retailers that offer socks with these features will be filling a consumer need often afforded by medical/specialty stores.

### Attitudes Toward Socks in General By Store Usually Shop At For Socks - 2005

<table>
<thead>
<tr>
<th>Attitude</th>
<th>Wal-Mart</th>
<th>Kmart</th>
<th>Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>I Buy Whatever My Spouse/Kids Want</td>
<td>30</td>
<td>28</td>
<td>26</td>
</tr>
<tr>
<td>I Always Buy The Same Brand Of Socks Because It’s The Brand I Trust</td>
<td>25</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>I Have More Colored Socks In My Wardrobe Than I Used To</td>
<td>26</td>
<td>28</td>
<td>28</td>
</tr>
<tr>
<td>I Have A Lot Of Casual Shoes That I Don’t Wear Any Socks With</td>
<td>24</td>
<td>26</td>
<td>29</td>
</tr>
<tr>
<td>Socks That Have Colored/Grey Heels And Toes Are More Comfortable To Wear</td>
<td>20</td>
<td>24</td>
<td>24</td>
</tr>
<tr>
<td>I Always Buy The Least Expensive Brand Of Socks</td>
<td>24</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>I Buy More Socks Because My Spouse/Kids/Myself Are Wearing Socks More Often</td>
<td>22</td>
<td>24</td>
<td>23</td>
</tr>
<tr>
<td>I Look For Lycra/Spandex When I Shop For Socks</td>
<td>15</td>
<td>17</td>
<td>19</td>
</tr>
<tr>
<td>I Look For Socks That Have Therapeutic Features</td>
<td>14</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>I Buy More Socks Because My Spouse/Kids/Myself Are Wearing A Wider Variety Of Styles</td>
<td>12</td>
<td>15</td>
<td>13</td>
</tr>
<tr>
<td>Fashion Is More Important Than Comfort In Socks</td>
<td>7</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Wearing Black Socks For Sports Or Exercise Look Cool</td>
<td>6</td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>
Consumer Attitudes

Market Insights: Socks 2005

Price still leads the way in 2005
Even as the economy starts to bounce back, 9 out of 10 respondents agree that price is an important feature to mass sock purchasers. A close second, comfort features are still sought out for socks, solidifying consumers' desire for a mixture of comfortable socks, but at a good value.

At Kmart, performance features continue to be important to 70% of its purchasers. Male sock buyers are more likely to seek out these features versus female sock purchasers.

Brand names are still important to Wal-Mart shoppers in 2005, but have become less important to Kmart and Target than in 2004. Thirty-two percent of those who reported buying socks for males cite brand names (slightly higher than last year) as a leading driver.

Importance of Sock Features By Store Usually Shop At For Socks - 2005

% of Sock Buyers Responding Very/Somewhat Important

- Price
- Comfort Features
- Color
- Style
- Performance Features
- Fashion
- Brand Names

Wal-Mart
Kmart
Target

Behind Every Business Decision

NPD Fashionworld® a division of The NPD Group, Inc.
Thirty percent of consumers report always experiencing some level of discomfort in their socks
In a new survey question for 2005, wearers were asked if they experienced any of the following discomfort when wearing socks. Of this 30%, 11% cite rubbing at the sock toe seam; 10% report that standard sock sizes are too small for their feet and socks don’t keep their feet warm. Other causes of discomfort include socks bunching in shoes and bulky socks causing shoes to be too tight.

% of Wearers Experiencing Discomfort “Always” or “Frequently” - 2005

- Rubbing at the sock toe seam: 11%
- Standard sock sizes being too small for feet: 10%
- Socks not keeping feet warm: 10%
- Socks bunching in shoes: 9%
- Standard sock sizes being too big for feet: 8%
- Bulkiness of socks causing shoes to be too tight: 8%
- Sock toes being too wide: 6%
- Blisters caused by ill-fitting socks: 2%
Category Dynamics

Market Insights: Socks 2005
Consumers are purchasing the same amount of socks as last year
Similar to past two years, just under half of respondents report purchasing 4-6 pairs of socks so far this year. Male sock purchasers are buying slightly more larger packs in 2005 (10+ pairs). Those shopping for under 18 year olds report buying more socks in 2005 (29% vs. 27% in 2004).

# of Pairs of Socks Purchased Since January - 3 Year Trend
(% of Sock Buyers)

<table>
<thead>
<tr>
<th># of Pairs of Socks Purchased Since January 2005</th>
<th>% of Sock Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender of Wearer</td>
<td>Age of Wearer</td>
</tr>
<tr>
<td>Male</td>
<td>Female</td>
</tr>
<tr>
<td>1-3 pairs</td>
<td></td>
</tr>
<tr>
<td>4-6 pairs</td>
<td></td>
</tr>
<tr>
<td>7-9 pairs</td>
<td></td>
</tr>
<tr>
<td>10+ pairs</td>
<td></td>
</tr>
</tbody>
</table>
Category Dynamics

Market Insights: Socks 2005

Purchasing dynamics in 2005
Similar to 2003-2004, over half of sock buyers report purchasing the usual amount of socks since January.

- Slightly over 1 in 4 buyers report buying more than the usual primarily because the wearer did not have enough socks and they found a good deal at retail. Given the heavier emphasis of promotional activity at retail, this is not surprising since good deals are in abundance.

- One in five 25-34 year old shoppers report buying more than usual. (4 percentage points higher than 2004).

| Statement Best Describing Number of Socks Purchased for Wearer Since January 2005 | % of Sock Buyers |
|---|---|---|---|---|---|---|---|---|
| | Gender of Wearer | Age of Wearer | <13 | <18 | 18-24 | 25-34 | 35-44 | 45+ |
| I bought the usual amount | Male | Female | 62 | 56 | 61 | 63 | 56 | 56 | 58 | 55 |
| Bought Fewer Than Usual (NET) | 11 | 17 | 11 | 11 | 20 | 18 | 16 | 16 |
| I already have enough | 7 | 12 | 7 | 7 | 18 | 14 | 10 | 11 |
| I spent money on other items | 1 | 2 | 2 | 2 | 1 | 2 | 3 | 1 |
| I didn’t like the selection offered | 2 | 3 | 2 | 2 | 1 | 1 | 4 | 3 |
| There was not a special deal | 2 | 2 | 3 | 3 | 1 | 2 | 2 | 2 |
| Bought More Than Usual (NET) | 27 | 28 | 28 | 27 | 25 | 27 | 26 | 29 |
| It was a good deal | 12 | 10 | 9 | 9 | 9 | 8 | 12 | 13 |
| I found a new product I liked | 4 | 5 | 3 | 3 | 4 | 3 | 5 | 7 |
| I didn’t have enough | 14 | 14 | 18 | 17 | 17 | 18 | 12 | 11 |
**Sock Purchase Frequency**

Compared to 2003, sock purchase frequency has held steady in 2005. Similarly, there continues to be about 1 in 4 sock buyers who report purchasing “more often than in the past”.

![Chart showing sock purchase frequency trends from 2003 to 2005.](chart)

Purchasers for female socks indicate that they are purchasing more socks than in the past (24% vs. 20% in 2003).

Similar to 2004, purchasers for younger wearers (under 13 and 18) are more likely to say they are purchasing more often than in the past compared to those purchasing for wearers aged 18+.

<table>
<thead>
<tr>
<th>Statement Best Describing How Frequently Purchase Socks for Wearer - 3 Year Trend (%) of Sock Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
</tr>
<tr>
<td>More often than in the past</td>
</tr>
<tr>
<td>Less often than in the past</td>
</tr>
<tr>
<td>At about the same rate</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Statement Best Describing How Frequenty Purchase Socks for Wearer - 2005 % of Sock Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender of Wearer</td>
</tr>
<tr>
<td>Male</td>
</tr>
<tr>
<td>More often than in the past</td>
</tr>
<tr>
<td>Less often than in the past</td>
</tr>
<tr>
<td>At about the same rate</td>
</tr>
</tbody>
</table>
Reasons for Buying More

Newly asked in 2005, thirty-six percent of buyers report that they are buying more socks due to a change/increase in physical/leisure activities.

Other popular reasons include trying new styles for different occasions or moods or buying in a larger pack size.

Lower prices and a change in occupation are on par with each other representing 13% of sock buyers.

In 2005, both male and female sock purchasers report buying more socks due to a change or increase in physical/leisure activities. Female sock buyers are drawn to buy more socks for different occasions or moods, while male sock buyers are buying in a larger pack size.

| Reasons for Buying More Socks Than In Past - 2005 (% of Those Buying More Socks) |
|-----------------------------------------|-----------------|-----------------|-----------------|-----------------|
|                                       | Gender of Wearer | Purchased Socks At |
|                                       | Male  | Female | Walmart | Kmart  | Target |
| To save time                           | 16  | 15   | 17   | 23   | 14    |
| Buying in a larger pack size           | 23  | 20   | 21   | 25   | 24    |
| Like to try new/different products     | 9   | 18   | 14   | 21   | 19    |
| Buying for different occasions or moods| 11  | 31   | 23   | 29   | 34    |
| Prices are lower than before           | 11  | 14   | 12   | 11   | 10    |
| Change in occupation                   | 10  | 15   | 11   | 18   | 10    |
| Change/increase in physical/leisure activities | 38  | 35   | 39   | 40   | 38    |
| None of these                          | 27  | 18   | 23   | 16   | 24    |

*Small base: <100
Open or closed packages - Which do you prefer?
The vast majority of consumers have no preference for open versus closed socks packages, as it depends on the type of sock purchased.

Sock buyers are slightly more likely to say that they prefer socks in plastic bags this year compared to last year (31% vs. 29%).

Within gender, males purchasers are more likely than female purchasers to report a preference for socks in plastic bags. Buyers for segments age 18+ prefer socks in an open package over those shopping for younger customer segments.
Key Insights About Sock Styles

Market Insights: Socks 2005
Key Insights About Sock Styles

Market Insights: Socks 2005

Consumers’ drawers are filled with socks
On average, females continue to have slightly more socks in their drawer than male wearers. The 25-34 age segment lead the way for 2005 with 22 pairs of socks owned. The 18-24 age segment levels dropped off from 2004 with this segment owning fewer socks.

Mean # of Socks Owned By Wearer Gender/Age Segment - 3 Year Trend

The vast majority of sock buyers claim that the wearer owns the right amount of socks. One in five of those shopping for the 25+ age segment feel that they have too many socks in the drawer.

Similar to prior years, Mass shoppers continue to average 20 pairs of socks in their drawers.

<table>
<thead>
<tr>
<th>Gender of Wearer</th>
<th>Age of Wearer</th>
<th>% of Sock Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Male</td>
<td>Female</td>
</tr>
<tr>
<td>Too many</td>
<td>14</td>
<td>20</td>
</tr>
<tr>
<td>About right</td>
<td>74</td>
<td>67</td>
</tr>
<tr>
<td>Too few</td>
<td>12</td>
<td>13</td>
</tr>
</tbody>
</table>
What draws consumers to replenish their socks drawers?

In the 2005 survey, consumers were asked about their replenishment habits for socks. Thirty-seven percent of sock buyers report that they buy socks throughout the year but throw out a bunch of socks a couple of times a year. Secondarily, one in four sock buyers purchase socks only a few times a year, adding them to the drawer until it is full/overflowing and then dispose of them a few pairs at a time.

Buyers for male sock wearers are more likely than female sock buyers to purchase socks only a few times a year. On the other hand, female sock buyers are more likely than male sock buyers to purchase socks throughout the year and then dispose of socks a few pair at a time.
Key Insights About Sock Styles

Market Insights: Socks 2005

Ankle/quarter and low cuts are becoming preferred styles

Ankle/quarter and low cut/footie sock styles jumped up considerably as styles owned by consumers in 2005. For the past several years, crew styles have always been reported as the primary style owned. Now, with vast selection of lower cut styles available, the trend continues to move towards lower cut styles.

While consumers still report white socks as their preferred style, consumers are becoming more drawn to solid colors, including black and navy.

% Share of Sock Styles Owned - 3 Year Trend

% Share of Sock Colors Owned - 3 Year Trend

*Not asked before 2005

Behind Every Business Decision

NPD Fashionworld® a division of The NPD Group, Inc.
**Key Insights About Sock Styles**

**Lower cut styles rule for female sock wearers**

In 2005, females report owning more ankle/quarter, low cut/footie and no show styles than in prior years. Male wearers continue to prefer crew styles, but the low cut/footie style has grown considerably since 2004 (12% vs. 4% in 2004).

- Wearers under the age of 18 now have substantially more lower cut styles in their wardrobe. On average, this segment owns 10% more of this style in 2005.
- Even the 35+ audience owns more low cut and no show styles than 2004.
Key Insights About Sock Styles

Market Insights: Socks 2005

**Solid Black is an important color for 25+ segment**
Profiled for the first time in 2005, solid black is being reported as an important color for the 25+ segment. Several manufacturers have begun to incorporate black socks into traditional bagged white or grey socks. As noted earlier in the report, consumers are stating that wearing black socks more often for fitness activities because it is “cool”.

White socks are still important across all segments, but the availability of solid color socks and white socks with colored heels/toes have increased in 2005.

---

% Share of Sock Colors Owned By Wearer Age and Gender Segment - 2005

- Solid White
- White with colored foot bottom
- Solid Black*
- Solid Navy*
- Pattern

*Not asked before 2005

---

% Share of Sock Colors Owned By Wearer Age and Gender Segment - 2004

- Solid White
- White with colored heel/toe
- Solid Black*
- Solid Color
- Pattern

---

*Not asked before 2005
How important are performance features to sock consumers?
Sixty percent of consumers are wearing socks with at least one of the performance features listed below. Just over one-third of sock buyers report buying socks with a grey/colored heel/toe or a reinforced heel/toe. About one quarter of consumers are wearing socks with extra cushioning. Dryness/moisture control remained steady at 9% for 2005.

New to the study in 2005, arch support is worn by 5% of the reported segments and is most important to the 18-24 year old segment. Socks that offer therapeutic/medical features appeal more to the 45+ age group.

Sock Features Worn
(% of Sock Buyers)

<table>
<thead>
<tr>
<th>Feature</th>
<th>2005</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grey/Colored Heel/Toe</td>
<td>36</td>
<td>34</td>
</tr>
<tr>
<td>Reinforced Heel/Toe</td>
<td>32</td>
<td>32</td>
</tr>
<tr>
<td>Extra Cushioning</td>
<td>25</td>
<td>27</td>
</tr>
<tr>
<td>Dryness/Moisture Control</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Arch Support</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Odor Control</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Therapeutic/medical features</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Blister Control</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>None Of These</td>
<td>33</td>
<td>40</td>
</tr>
</tbody>
</table>

Note: Trend unavailable for 2002 and 2003
Market Insights: Socks 2005

**Crew/cuff styles have lost ground in 2005**
For several years, the crew/cuff styles topped the list as the style purchased most often by consumers. Now, with the growing availability of ankle and lower cut styles in the marketplace, both male and female buyers report purchasing more of these styles since January. While lower cut styles have appealed to the female customer for quite some time, these styles have gained momentum with buyers for male socks.

| % Purchased Sock Style Since January By Wearer Gender (% of Sock Buyers) |
|-----------------------------|------------------|------------------|------------------|
| Knee High/Over-The Calf/Trouser | 13  | 17  | 14  | 18  | 14  | 18  |
| Crew/Cuff                  | 56  | 40  | 69  | 62  | 77  | 65  |
| Ankle/Quarter              | 26  | 36  | 27  | 33  | 17  | 33  |
| Low Cut/Footie             | 20  | 31  | 7   | 18  | 5   | 14  |
| No-Show/Foot Cover/Liner Sock | 8   | 13  | 2   | 7   | 2   | 5   |

Across the board, every age group profiled continues to want a variety of sock styles to choose from. However, some styles are more popular among certain age groups than others.

Purchasing for no-show styles has jumped up 13 percentage points for wearers age 18-24 and +8 percentage points for wearers under 18. Even more important, the low cut/footie styles received a rather large boost of 19 percentage points from the under 18 crowd and 14 percentage points gain from the 25-34 audience.

| % Purchased Sock Style Since January By Wearer Age (% of Sock Buyers) |
|-----------------------------|------------------|------------------|------------------|
| Knee High/Over-The Calf/Trouser | 7  | 15  | 21  | 20  | 7  | 14  | 20  | 23  | 6  | 13  | 15  | 18  |
| Crew/Cuff                  | 44  | 42  | 44  | 55  | 65  | 52  | 62  | 66  | 74  | 69  | 59  | 67  |
| Ankle/Quarter              | 40  | 26  | 36  | 29  | 37  | 34  | 39  | 36  | 25  | 27  | 36  | 32  |
| Low Cut/Footie             | 32  | 31  | 26  | 17  | 12  | 14  | 17  | 11  | 9  | 13  | 25  | 13  |
| No-Show/Foot Cover/Liner Sock | 10  | 18  | 9   | 5   | 3   | 14  | 6   | 5   | 2   | 4   | 8   | 6 | 2 |
Key Insights About Sock Styles

Market Insights: Socks 2005

Which colors appeal to low-cut and no-show purchaser?
The growth of low-cut and no-show styles has been evident throughout the Socks Insights report. In 2005, black and grey color have leaped ahead of the lighter ivory/beige color in 2004. On average, these colors experienced a 9 percentage point gain from 2004.

| % Wearing Each Solid Color by Sock Style - 2005 (Among Those Purchasing Sock Style in a Solid Color) |
|---|---|---|---|---|---|---|---|---|---|
| Knee High/Over-The-Calf/Trouser | Crew/Cuff | Ankle/Quarter | Low Cut/Footie | No Show/Foot Cover/Liner |
| Ivory/Beige | 39 | 39 | 34 | 27 | 36 |
| Red | 12 | 29 | 30 | 23 | 15 |
| Navy | 58 | 56 | 48 | 26 | 18 |
| Denim | 5 | 13 | 14 | 8 | 6 |
| Royal Blue | 12 | 23 | 25 | 21 | 16 |
| Black | 85 | 77 | 61 | 46 | 53 |
| Grey | 34 | 37 | 30 | 17 | 14 |
| Khaki | 24 | 29 | 24 | 9 | 8 |
| Brown | 39 | 30 | 22 | 6 | 5 |
| Other | 19 | 31 | 39 | 48 | 36 |

Across all solid colors worn, the majority of consumers state they are buying the same colors as last year. Of all colors profiled, black and grey styles are reported as being purchased more often versus other solid colors than 2004.

| % Wearing Each Sock Color More, Less or About the Same Compared to One Year Ago - 2005 (Among Those Purchasing Sock Color) |
|---|---|---|---|---|---|---|---|---|
| Ivory/Beige | Red | Navy | Denim | Royal Blue | Black | Grey | Khaki | Brown |
| More Often | 18 | 16 | 18 | 19 | 17 | 38 | 26 | 26 | 21 |
| Less Often | 16 | 21 | 13 | 16 | 21 | 8 | 12 | 15 | 18 |
| About the Same | 66 | 64 | 69 | 65 | 62 | 55 | 62 | 59 | 62 |
Key Insights About Sock Styles

Market Insights: Socks 2005

Crew styles are most preferred for everyday wear, but the lower cuts are important for physical sports.
In 2005, buyers continue to report crew styles as most versatile for everyday wear and lounging around the house. The ankle/quarter and low cut footies are slightly more likely to appeal to those participating in sports/exercise activities.

With the vast array of patterns/colors available for knee high/trouser socks, it is not a surprise to see these styles cited more often for special occasions versus other styles.

<table>
<thead>
<tr>
<th>Sock Style</th>
<th>Work</th>
<th>Casual/Everyday</th>
<th>At Home/Lounging</th>
<th>Date/Evening Activity</th>
<th>Special Occasion/Dress-up</th>
<th>Participate In Sport/Exercise</th>
<th>Part Of Uniform - School Or Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knee High/Over-The-Calf/Trouser</td>
<td>47</td>
<td>44</td>
<td>25</td>
<td>36</td>
<td>38</td>
<td>19</td>
<td>14</td>
</tr>
<tr>
<td>Crew/Quarter</td>
<td>41</td>
<td>80</td>
<td>76</td>
<td>57</td>
<td>21</td>
<td>45</td>
<td>17</td>
</tr>
<tr>
<td>Ankle/Footie</td>
<td>26</td>
<td>76</td>
<td>56</td>
<td>18</td>
<td>11</td>
<td>47</td>
<td>14</td>
</tr>
<tr>
<td>Low Cut/Footie</td>
<td>18</td>
<td>69</td>
<td>54</td>
<td>15</td>
<td>6</td>
<td>47</td>
<td>12</td>
</tr>
<tr>
<td>No Show/Foot Cover/Liner Sock</td>
<td>20</td>
<td>62</td>
<td>40</td>
<td>16</td>
<td>10</td>
<td>38</td>
<td>15</td>
</tr>
</tbody>
</table>
Key Insights About Sock Styles

Market Insights: Socks 2005

Sock Styles Worn by Footwear Type
Crew, ankle/quarter and low cut/footie sock styles appeal to those wearing athletic/active footwear. Ankle/quarter styles have increased slightly for those wearing athletic footwear with an open heel.

While Knee high/trouser and crew styles have seen increases for casual footwear wearers, the ankle/quarter style grew by 14 percentage points compared to 2004. The knee high/trouser and crew styles also attract casual boot and work boot wearers.

No-show/foot covers continue to gain importance for the casual clog/slip-in customer.

<table>
<thead>
<tr>
<th>% Wearing Each Footwear Type by Sock Style - 2005</th>
<th>Knee High/Over-The-Calf/Trouser</th>
<th>Crew/Ankle Quarter</th>
<th>Low Cut/footie</th>
<th>No Show/foot Cover/Liner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Athletic/Active Footwear (NET)</td>
<td>42</td>
<td>82</td>
<td>82</td>
<td>78</td>
</tr>
<tr>
<td>Athletic Footwear With Closed Heel</td>
<td>30</td>
<td>74</td>
<td>76</td>
<td>71</td>
</tr>
<tr>
<td>Athletic Footwear With Open Heel</td>
<td>4</td>
<td>10</td>
<td>14</td>
<td>12</td>
</tr>
<tr>
<td>Sport Sandals</td>
<td>4</td>
<td>9</td>
<td>12</td>
<td>11</td>
</tr>
<tr>
<td>Hiking Footwear</td>
<td>19</td>
<td>34</td>
<td>20</td>
<td>9</td>
</tr>
<tr>
<td>Casual Footwear (NET)</td>
<td>60</td>
<td>62</td>
<td>48</td>
<td>33</td>
</tr>
<tr>
<td>Casual Shoes With Closed Heel</td>
<td>44</td>
<td>48</td>
<td>37</td>
<td>26</td>
</tr>
<tr>
<td>Casual Clogs/Slip-Ins With Open Heel</td>
<td>17</td>
<td>15</td>
<td>15</td>
<td>11</td>
</tr>
<tr>
<td>Casual Boots</td>
<td>35</td>
<td>34</td>
<td>19</td>
<td>9</td>
</tr>
<tr>
<td>Work Boots</td>
<td>25</td>
<td>25</td>
<td>11</td>
<td>5</td>
</tr>
<tr>
<td>Dress Footwear (NET)</td>
<td>59</td>
<td>37</td>
<td>22</td>
<td>12</td>
</tr>
<tr>
<td>Dress Shoes With Closed Heel</td>
<td>43</td>
<td>25</td>
<td>14</td>
<td>7</td>
</tr>
<tr>
<td>Dress Shoes-Clogs/Slip-Ins With Open Heel</td>
<td>19</td>
<td>9</td>
<td>8</td>
<td>5</td>
</tr>
<tr>
<td>Dress Boots</td>
<td>36</td>
<td>20</td>
<td>11</td>
<td>6</td>
</tr>
</tbody>
</table>
Future Purchase Plans

Market Insights: Socks 2005
Market Insights: Socks 2005

**A higher percentage of Low cut and no-show styles are expected for future purchasing**

While close to 40% of consumers plan to purchase crew styles, sock buyers expect to buy more low cut and no-show styles than in prior years.

Similarly, solid white socks are the preferred color for future purchases, but solid colors including black and navy will also be a priority to sock buyers.
Crew/cuff styles are most likely to be purchased next time

Similar to prior years, crew/cuff styles are the most preferred style for future purchase.

• Male sock buyers are most likely to purchase this style, while female sock buyers will be more drawn to ankle/quarter and low cut styles versus their male counterparts.
• The 18-24 year old group is most likely to buy the low-cut/footie styles.

Solid white socks are most preferred next time

• While white socks are the color of choice for future purchases, white socks with colored heel/toes are more likely to be selected for male wearers and for those under the age of 18 and 25-34 segments.
• Solid black sock offerings will attract the 25+ age segment.
Future Purchase Plans

**Market Insights: Socks 2005**

**Future style preferences by outlet shopped**

Across retail, crew socks are the preferred style, but more shoppers will consider ankle/quarter and low-cut styles for future purchases. Consumers are more likely to buy ankle/quarter styles at the Big 3 Mass Merchant retailers. Specialty and Target have a slight edge over the other retailers in terms of consumers purchasing low cut/footie styles in the future.

**Favorite colors that consumers will buy next time**

While solid white remains the preferred color for sock buyers, white with color heel/toes are gaining importance at Wal-Mart. Solid black offerings appeal most to Department store and Kohl’s shoppers.
Appendix A: Consumer Confidence

Market Insights: Socks 2005
Appendix A: Consumer Confidence

Market Insights: Socks 2005

Are you spending more or less discretionary income this year?
While rising gas prices and prices for necessity purchases continue to shrink the discretionary income, consumers report that they are spending more compared to last year. Perhaps a rebounding economy is allowing customers to spend more at retail which is good news for manufacturers and retailers alike.

![Chart showing spending trends](chart.png)
Appendix B: Channel Definitions

Market Insights: Socks 2005
Appendix B

Market Insights: Socks 2005

**Department Stores:**
- Belk
- Dayton-Hudson Department Stores
- Dillard’s Department Stores
- Federated Merchandising Group
- May Company
- Saks Inc.
- And other similar stores

**Discount Stores:**
- Fred Meyer
- Kmart
- Meijer
- Shopko
- Target
- Wal*Mart
- And other similar stores

**Factory Outlet Stores:**
- Bali/Hanes/L’eggs Factory Outlet
- Carter’s Outlet
- Vanity Fair Outlet
- And other similar stores

**Mail Order Catalogs:**
- One Hanes Place Catalog
- Lands’ End
- L.L. Bean
- And other similar mail order companies

**National Chain Stores:**
- JC Penney
- Kohl’s
- Mervyn’s
- Sears
Appendix B

Market Insights: Socks 2005

**Off Price Retailers:**
Burlington Coat Factory
Marshall’s
Ross Stores
T.J. Maxx
And other similar stores

**Specialty Stores:**
Banana Republic
Disney Store
Foot Locker
Gap
Gap Kids/Baby Gap
Old Navy
The Limited
Sports Authority
Structure
And other similar stores

**Warehouse Clubs:**
B.J.’s
Price Club / Costco
Sam’s Club
And other similar stores

**Other Stores:**
Drug Stores
Food Stores
Home Shopping Stores
Appendix C: Questionnaire

Market Insights: Socks 2005
Socks Market Insights 2005

1a. Have you purchased any socks - including basic, sports and fashion socks - for any of the following members of your family, including yourself, since January 2005? (Select all that apply)

Yourself
Spouse
Child Under Age 13
Child or Other Family Member Age 13+
None of these [VALIDATE]

IF Q1a="NONE OF THESE", GO TO NON-QUALIFIER SURVEY

1b. Please indicate the age and gender for each family member you have purchased socks for since January 2005. (Select the age and gender for each family member you purchased for)

PIPE IN EACH HOUSEHOLD MEMBER PURCHASED FOR IN Q1A

2 PULL DOWN MENUS FOR EACH MEMBER

Yourself
Age [PULL DOWN MENU: 0-99]
Gender [PULL DOWN MENU: Male, Female]

Spouse
Age [PULL DOWN MENU: 0-99]
Gender [PULL DOWN MENU: Male, Female]

ADD: If you've purchased socks for more than one child, please answer for only one.
Child Under Age 13
Age [PULL DOWN MENU: 0-99]
Gender [PULL DOWN MENU: Male, Female]

ADD: If you've purchased socks for more than one child/other family member, please answer for only one.
Child or Other Family Member Age 13+
Age [PULL DOWN MENU: 0-99]
Gender [PULL DOWN MENU: Male, Female]
ROUTE IN ONLY 1 HOUSEHOLD MEMBER FOR REMAINDER OF SURVEY.

ORDER OF PRIORITY:

1. Child Under Age 13 = Male
2. Child Under Age 13 = Female
3. Yourself = Male
4. Yourself = Female
5. Spouse = Male
6. Spouse = Female
7. Child or Other Family Member Age 13+ = Male
8. Child or Other Family Member Age 13+ = Female

INSERTS FOR REMAINING QUESTIONS BASED ON Q1 PRIORITIES:
IF HOUSEHOLD MEMBER = “YOURSELF”, INSERT "yourself"
IF HOUSEHOLD MEMBER = “SPOUSE”, INSERT "your spouse"
IF HOUSEHOLD MEMBER = “MALE CHILD UNDER AGE 13”, INSERT “the male child under age 13 in your household”
IF HOUSEHOLD MEMBER = “FEMALE CHILD UNDER AGE 13”, INSERT “the female child under age 13 in your household”
IF HOUSEHOLD MEMBER = “MALE CHILD OR OTHER FAMILY MEMBER AGE 13+”, INSERT “the male child/other family member age 13+”
IF HOUSEHOLD MEMBER = “FEMALE CHILD OR OTHER FAMILY MEMBER AGE 13+”, INSERT “the female child/other family member age 13+”

2. Which of the following brands of socks, if any, have you ever heard of? (Select as many as apply for each type of sock listed below)

MULTI-PUNCH GRID

TOP
Athletic Socks
Fashion Socks

SIDE
IF HOUSEHOLD MEMBER=FEMALE
9 West
Adidas
All Pro
Athletech
Auro
Basic Editions
Basic Image
Calvin Klein
C9
Champion
Cherokee
Circo
Disney
DKNY
Fruit of the Loom
Faded Glory
Gitano
Gold Toe
Hanes/Hanes Her Way
Hue
Joe Boxer
Keds
Kid Connection
Leggswear
Liz Claiborne
McKids
Merona
Nike
No Nonsense
Old Navy
Polo / Ralph Lauren
Puma
Peds
Pro Spirit
Reebok
Russell
Silver Toe
Sonoma
St. Johns Bay
The Gap
Tommy/Tommy Hilfiger
Under Armour
Vassarette
Van Heusen
Wonder Kids
Other (Please specify) [VALIDATE]

IF HOUSEHOLD MEMBER=MALE
Adidas
All Pro
Athletech
Auro
Basic Editions
Billy the Kid
Bugle Boy
Burlington
Calvin Klein
C9
Champion
Circo
Columbia
Dickies
Dockers
Fruit of the Loom
Faded Glory
Gold Toe
Hanes
Please think only about the socks purchases you made for [INSERT] since January 2005 for the next few questions.

3. How many pairs of socks have you purchased for [INSERT] since January 2005? (Select one)

PULL DOWN MENU: 1-19, 20+

4. When buying for [INSERT], do you prefer to purchase socks by the single pair not in packages, single pairs in packages, 2-3 pairs per package, 4-5 pairs per package, 6-7 pairs per package, or 10+ pairs per package? (Select one)

Prefer single pairs, not in packages
Prefer a single pair in package
Prefer packages with 2-3 pairs per package
Prefer packages with 4-5 pairs per package
Prefer packages with 6 or 7 pairs per package
Prefer packages with 10 or more per package
No Preference/depends on the type sock
5. Which packaging do you prefer when shopping for socks for [INSERT] - plastic bags or open packaged socks (on cardboard or banded)? (Select one)

Prefer socks in plastic bags
Prefer socks in an open package (on cardboard or banded)
No Preference/Depends on the type of sock

6. Where do you usually shop for socks for [INSERT]? (Select all that apply)

Department stores (such as Macy’s, Nordstrom, Belk, Dillard’s, Marshall Fields, Saks, etc.)
Specialty Stores (such as Victoria's Secret, The Limited, The Gap, Sports Authority, Footlocker)
Off Price Stores (such as TJ Maxx, Marshall’s, Big Lots)
Dollar Stores (such as Dollar General, Family Dollar, Dollar Tree)
Warehouse Clubs (such as Costco, Sam’s, BJ’s)
Food/Drug Stores
J.C. Penney
Kmart
Kohl’s
Mervyn’s
Sears
Target
Wal-Mart
Other Discount Stores
Factory Outlets
Direct Mail/Catalogs
Other (Specify) [VALIDATE]

7. And where do you purchase most other apparel items for [INSERT]? (Select all that apply)

Department stores (such as Macy’s, Nordstrom, Belk, Dillard’s, Marshall Fields, Saks, etc.)
Specialty Stores (such as Victoria's Secret, The Limited, The Gap, Sports Authority, Footlocker)
Off Price Stores (such as TJ Maxx, Marshall’s, Big Lots)
Dollar Stores (such as Dollar General, Family Dollar, Dollar Tree)
Warehouse Clubs (such as Costco, Sam’s, BJ’s)
Food/Drug Stores
J.C. Penney
Kmart
Kohl’s
Mervyn’s
Sears
Target
Wal-Mart
Other Discount Stores
Factory Outlets
Direct Mail/Catalogs
Other
8a. Which of the following statements describe the number of socks you purchased for [INSERT] since January 2005? (Select all that apply)

I bought the usual amount
I bought fewer than usual because I already have enough
I bought fewer than usual because I spent money on other items
I bought fewer than usual because I didn’t like the selection offered
I bought fewer than usual because there was not a special deal
I bought more than usual because it was a good deal
I bought more than usual because I found a new product I liked
I bought more than usual because I didn’t have enough

8b. Thinking about how frequently you purchase socks for [INSERT], would you say you are currently buying socks more often, less often or at about the same rate compared to in the past? (Select one)

More often than in the past
Less often than in the past
At about the same rate

8c. Thinking about [INSERT], would you say you are currently buying more, less, or about the same amount of socks per shopping occasion compared to in the past? (Select one)

Buying more each time than in past
Buying less each time than in past
Buying the same amount as in past

ASK Q8d IF Q8c = “MORE”, ELSE GO TO Q9

8d. Which of the following reasons, if any, describe why you are currently buying more socks for [INSERT] than you did in the past? (Select all that apply)

[RANDOMIZE LIST]
To save time
Buying in a larger pack size (more in the bag)
Like to try new/different products
Buying for different occasions or moods
Prices are lower than before
Change in occupation
Change/increase in physical/leisure activities
None of these [VALIDATE]
ASK Q8e IF Q8d = “Like to try new/different products”

8e. What is new and different about the products you are currently buying? (Select all that apply)

[RANDOMIZE LIST]
Style (such as low cuts or no shows)
Color
Rib or texture (such as thin, wide, mesh)
Cushioning (full or half)
Performance/Function (such as Coolmax, Lycra or odor control)
New brands
Other (Please specify) [VALIDATE]


MULTI-PUNCH GRID

TOP
Purchased January 2004
Ever Wear

INSERT STYLE LINE DRAWINGS
SIDE
Knee High/Over-The Calf/Trouser
Crew/Cuff
Ankle/Quarter
Low Cut/Footie
No-Show/Foot Cover/Liner Sock

11. For each style ever worn, please indicate if this style is being worn more often, less often, or about the same amount compared to a year ago. (Select one for each)

PULL DOWN MENU:
More often
Less Often
About the same

PIPE IN STYLES EVER WORN FROM Q9
13. For each style [INSERT] ever wears a solid color, please indicate which solid colors he/she wears. (Select all that apply for each style listed)

MULTI-PUNCH GRID

TOP
Ivory/Beige
Red
Navy
Denim
Royal Blue
Black
Grey
Khaki
Brown
Other

SIDE
PIPE IN STYLES FROM Q12 THAT = “SOLID COLOR”

14. For each COLOR [INSERT] ever wears, please indicate if he/she is wearing this color more often, less often, or about the same amount compared to a year ago. If he/she doesn’t wear a particular color listed, please select “Never wear” for that color. (Select one for each)

TOP
More often
Less Often
About the same
Never Wear

SIDE
Ivory/Beige
Red
Navy
Denim
Royal Blue
Black
Grey
Khaki
Brown
Other
15. For what activities or occasions does [INSERT] use each style/silhouette sock?
(Select all that apply for each style listed below)

**MULTI-PUNCH GRID**

**TOP**
- Work
- Casual/Everyday
- At Home/Lounging
- Date/Evening Activity
- Special Occasion/Dress-up
- Participate in Sport/Exercise
- Part of uniform – School or Work

**SIDE**

**PIPE IN STYLES EVER WORN FROM Q9**

16. With what types of shoes or footwear does [INSERT] use each style/silhouette sock? (Select all that apply for each style listed below)

**MULTI-PUNCH GRID**

**NOTE:** TOP AND SIDE OF GRID HAVE BEEN FLIPPED DUE TO SPACE ISSUES IN THE TOP OF THE GRID. IT MAY BE EASIER TO HIDE THE CURRENT Q16 AND LEAVE A PLACE HOLDER, AND THEN ADD THE NEW Q16 AS A NEW QUESTION.

**SIDE**
- Athletic Footwear -closed heel (running, tennis, soccer, etc.)
- Athletic Footwear with open heel
- Sport Sandals
- Hiking Footwear
- Casual shoes-closed heel
- Casual clogs/slip-ins with open heel
- Casual boots
- Work boots
- Dress boots
- Dress shoes-closed heel
- Dress Shoes-clogs/slip-ins with open heel
- Other (Please specify)

**TOP**

**PIPE IN STYLES EVER WORN FROM Q9**
17b. Does [INSERT] ever wear socks with any of the following features? (Select all that apply)

RANDOMIZE LIST:
Odor control
Reinforced heel/toe
Gray/colored heel/toe
Extra cushioning
Blisters control
Dryness/moisture control
Arch support
Therapeutic/medical features (such as aiding with blood circulation)
None of these [VALIDATE]

18. How many pairs of socks does [INSERT] currently have in his/her drawer/closet wardrobe? (Select one)
PULL DOWN MENU 1-99

19. What percentage of [INSERT]'s socks are each style? (Select one for each style owned. Please remember, the total of all styles owned must equal 100%.)

INSERT STYLE LINE DRAWINGS

PULL DOWN MENU: 0%-100% [DEFAULT AT 0% AND VALIDATE CHECK SUM]
Knee High/Over-The Calf/Trouser
Crew/Cuff
Ankle/Quarter
Low Cut/Footie
No-Show/Foot Cover/Liner Sock

20. What percentage of [INSERT]'s socks are each COLOR? (Select one for each style owned. Please remember, the total of all styles owned must equal 100%.)
PULL DOWN MENU: 0%-100% [DEFAULT AT 0% AND VALIDATE CHECK SUM]
Solid White
White with colored heel/toe
White with colored foot bottom
Solid color
Pattern

21. Which statement best describes how you feel about the number of socks you have in the drawer for [INSERT]? (Select one)
Too many
About right
Too Few
21b. Which statement best describes how you add and discard socks for [INSERT]?
(Select one)
I buy socks only a few times a year and then go home and throw out all the old socks
I buy socks only a few times a year, add them to the drawer until it is full/overflowing,
and then I throw out a few pair at a time
I buy socks throughout the year but throw out a bunch of socks a couple of times a year
I buy socks throughout the year and just keep adding to the drawer until it is
full/overflowing, and then I throw out a few pair at a time

22. Thinking of your next 10 purchases of socks for [INSERT], please indicate below
how many times you would purchase each of the following styles. (Select the number
for each style you would purchase. Please remember, your total must equal 10.)

**INSERT STYLE LINE DRAWINGS**

PULL DOWN MENU: 0-10 [DEFAULT AT 0 AND VALIDATE CHECK SUM]

Knee High/Over-The Calf/Trouser
Crew/Cuff
Ankle/Quarter
Low Cut/Footie
No-Show/Foot Cover/Liner Sock

23. Thinking of your next 10 purchases of socks for [INSERT], please indicate below
how many times you would purchase each of the following colors. (Select the number
for each color you would purchase. Please remember, your total must equal 10.)

PULL DOWN MENU: 0-10 [DEFAULT AT 0 AND VALIDATE CHECK SUM]

Solid White
White with colored heel/toe
White with colored foot bottom
Solid black
Solid navy
Other solid color
Pattern

24a. Thinking about buying socks for [INSERT], please indicate how important each of
the following factors is to you. (Select one for each)

**GRID HEADING:**
Very important
Somewhat important
Neither important nor unimportant
Somewhat unimportant
Very unimportant
GRID SIDE:
[RANDOMIZE LIST]
Style
Fashion
Comfort features
Price
Brand names
Performance features
Color

24b. Thinking about buying socks for [INSERT], please indicate how much you agree or disagree with each of the following statements. (Select one for each statement)

GRID HEADING:
Agree Strongly
Agree Somewhat
Neither Agree Nor Disagree
Disagree Somewhat
Disagree Strongly

GRID SIDE:
IF HH MEMBER = “YOURSELF”, INSERT THE FOLLOWING STATEMENTS:

I always buy the same brand of socks because it's the brand I trust
Comfort is more important than fashion when buying socks
I buy more multi-packs of socks than I used to, so I don't need to shop for socks as often
Wearing black socks for sports or exercise look cool
The type of sock I wear depends on the style shoe I'll be wearing
I never wear plain white athletic socks with my work clothes, even if I'm dressed casually for work
I buy socks specifically for lounging or wearing around the house
I have more colored socks in my wardrobe than I used to
Socks that have colored/grey heels and toes are more comfortable to wear
Socks that have colored/grey heels and toes are more durable
Low cut and super low cut socks are in fashion right now
I only wear low cut and super low cut socks with athletic shoes
Fashion is more important than comfort in socks
I just grab whatever is on the top of my drawer when choosing what socks to wear
I look for Lycra/Spandex when I shop for socks
I have a lot of casual shoes that I don't wear any socks with
I never wear socks with open-heeled shoes
The type of sock I wear depends on the outfit I'll be wearing
I buy socks to match certain outfits
I always buy the least expensive brand of socks
I buy whatever my spouse/kids want
I buy more socks because my spouse/kids/self are wearing socks more often
I buy more socks because my spouse/kids/self are wearing a wider variety of styles
I look for socks that have therapeutic features
FOR ALL OTHER HOUSEHOLD MEMBERS:
IF HOUSEHOLD MEMBER = “SPOUSE”, INSERT **My spouse**
IF HOUSEHOLD MEMBER = “MALE CHILD UNDER AGE 13”, INSERT **The male child under age 13 in my household**
IF HOUSEHOLD MEMBER = “FEMALE CHILD UNDER AGE 13”, INSERT **The female child under age 13 in my household**
IF HOUSEHOLD MEMBER = “MALE CHILD OR OTHER FAMILY MEMBER AGE 13+”, INSERT **The male child/other family member age 13+ in my household**
IF HOUSEHOLD MEMBER = “FEMALE CHILD OR OTHER FAMILY MEMBER AGE 13+”, INSERT **The female child/other family member age 13+ in my household**

HIGHLIGHTS BELOW INDICATE DIFFERENCES IN LIST FOR “YOURSELF”

I always buy the same brand of socks for [INSERT] because it’s the brand I trust
I buy more multi-packs of socks for [INSERT] than I used to, so I don’t need to shop for socks as often
Wearing black socks for sports or exercise look cool to [INSERT]
The type of sock [INSERT] wears depends on the style shoe he/she will be wearing
[HIDE STATEMENT] I never wear plain white athletic socks with my work clothes, even if I’m dressed casually for work
I buy socks for [INSERT] specifically for lounging or wearing around the house
[INSERT] has more colored socks in his/her wardrobe than he/she used to
Socks that have colored/grey heels and toes are more comfortable for [INSERT] to wear
Socks that have colored/grey heels and toes are more durable for [INSERT]
Low cut and super low cut socks are in fashion right now for [INSERT]
[INSERT] only wears low cut and super low cut socks with athletic shoes
Fashion is more important than comfort in socks for [INSERT]
[INSERT] just grabs whatever is on the top of his/her drawer when choosing what socks to wear
I look for Lycra/Spandex when I shop for socks for [INSERT]
[INSERT] has a lot of casual shoes that he/she don’t wear any socks with
[INSERT] never wears socks with open-heeled shoes
The type of sock [INSERT] wears depends on the outfit he/she will be wearing
I buy socks to match certain outfits for [INSERT]
I always buy the least expensive brand of socks for [INSERT]
I buy whatever my spouse/kids want
I buy more socks because my spouse/kids/self are wearing socks more often
I buy more socks because my spouse/kids/self are wearing a wider variety of styles
I look for socks for [INSERT] that have therapeutic features

24c. Thinking about the style of socks worn most often by [INSERT], how often do [INSERT] experience the following? (Select one for each)

GRID HEADING:
Always
Frequently
Sometimes
Occasionally
Never
RANDOMIZE
GRID SIDE:
Blisters caused by ill-fitting socks
Rubbing at the sock toe seam
Socks bunching in shoes
Bulkiness of socks causing shoes to be too tight
Socks not keeping feet warm
Sock toes being too wide
Standard sock sizes being too big for feet
Standard sock sizes being too small for feet

25. After paying all your regular bills, are you spending more, less or about the same amount of money on other things as you were this time last year? (Select one)

Spending less money this year than last year
Spending more money this year than last year
Spending about the same this year as last year
Appendix D: About The NPD Group, Inc.

Market Insights: Socks 2005
About The NPD Group, Inc

The NPD Group, Inc. (NPD) is a global market information company that measures product movement and consumer behavior across a broad range of industries -- apparel, automotive products, consumer electronics, cosmetics and fragrances, food, foodservice, footwear, housewares, information technology, interactive entertainment, toys and music. NPD's clients, many in the Fortune 500, use this insight to uncover market opportunities, strengthen channel relationships and benchmark industry performance. Since 1967, NPD has introduced numerous industry firsts, most recently combining and calibrating information from consumer panels and point-of-sale tracking via its flagship services, the NPD Worlds. The firm has offices and affiliations in 60 countries.

For more information on The NPD Group, visit www.npd.com.

About NPD Fashionworld℠

NPD Fashionworld®, a division of The NPD Group, provides sales and marketing information for manufacturers, retailers and related services in the apparel and footwear industries. NPD Fashionworld provides the most accurate market intelligence available, including what is selling, where, to whom and why. Information is delivered online in a secure, Web-based environment via interactive delivery tools that make information accessible and actionable to a wide range of users -- from executives to sales and marketing to research. Today more than 100 market-leading companies in the industry rely on NPD Fashionworld for the knowledge they need to drive better, fact-based decision making.

For more information about NPD Fashionworld, visit www.npdfashionworld.com.