

BESPOKE SURVEYS

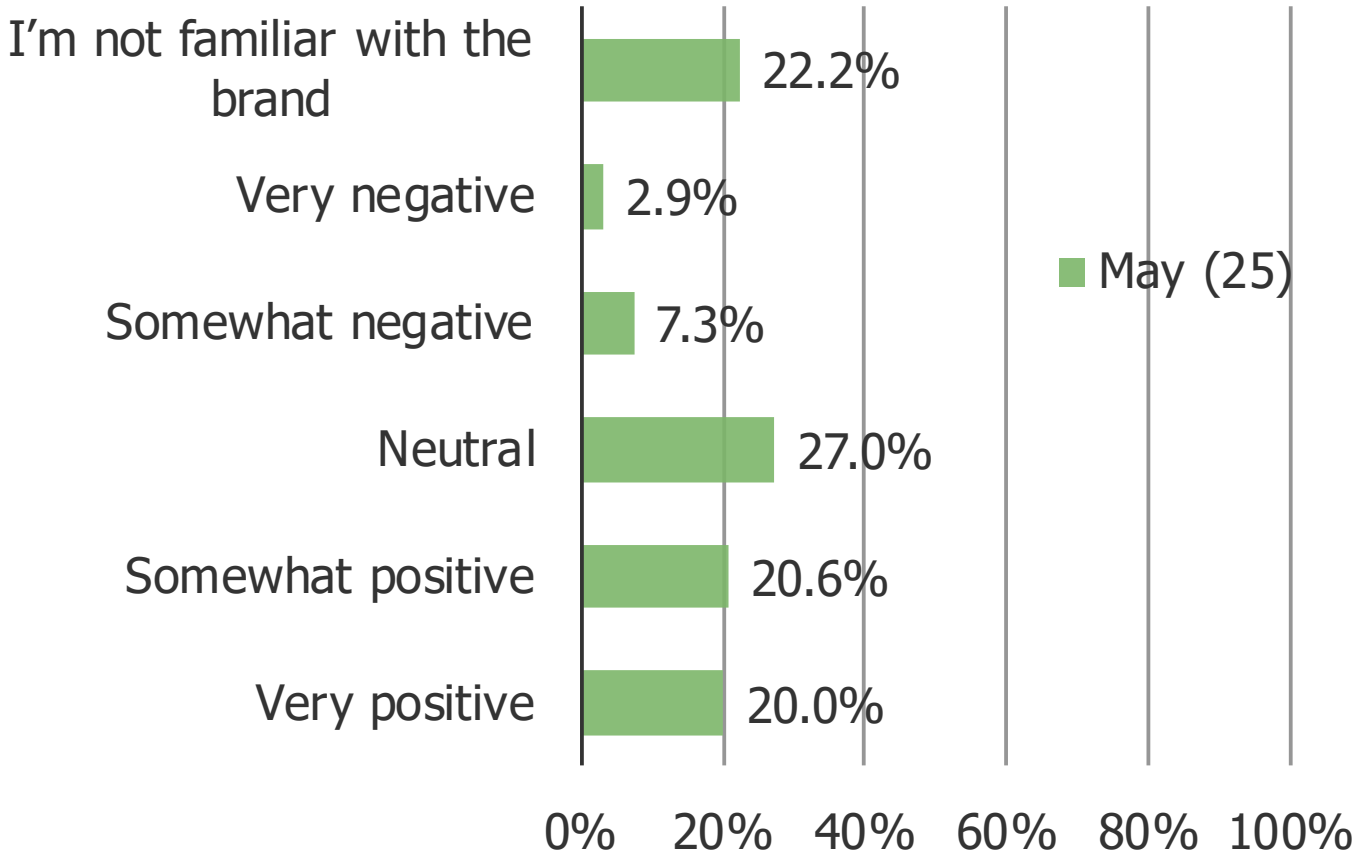
Footwear, Vol 36

1,250+ Respondents Per Quarter

NEW QUESTIONS

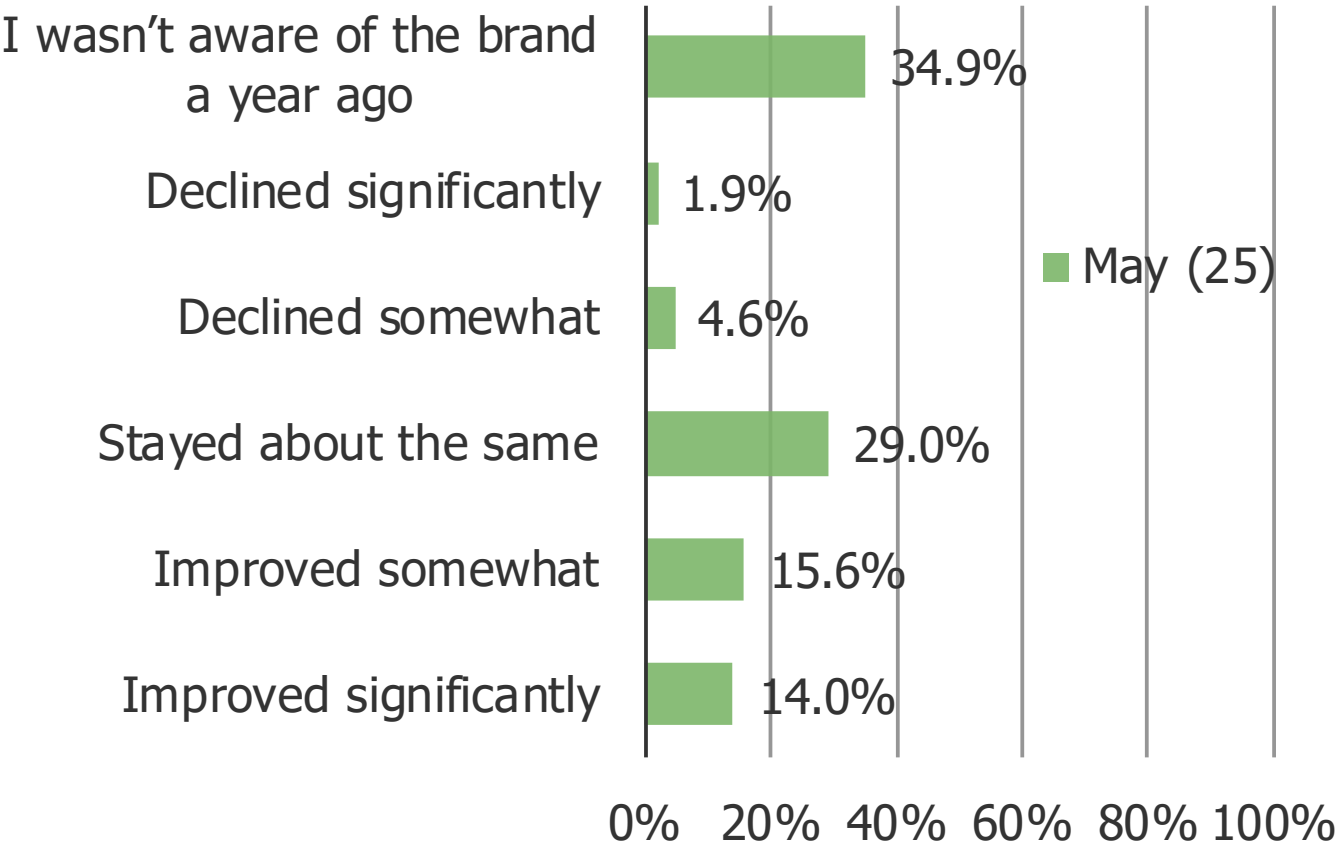
HOW WOULD YOU DESCRIBE YOUR OVERALL PERCEPTION OF THE ON (ON CLOUD) BRAND TODAY?  
EXAMPLES OF THEIR SHOES PICTURED IN THE SURVEY

Posed to all respondents



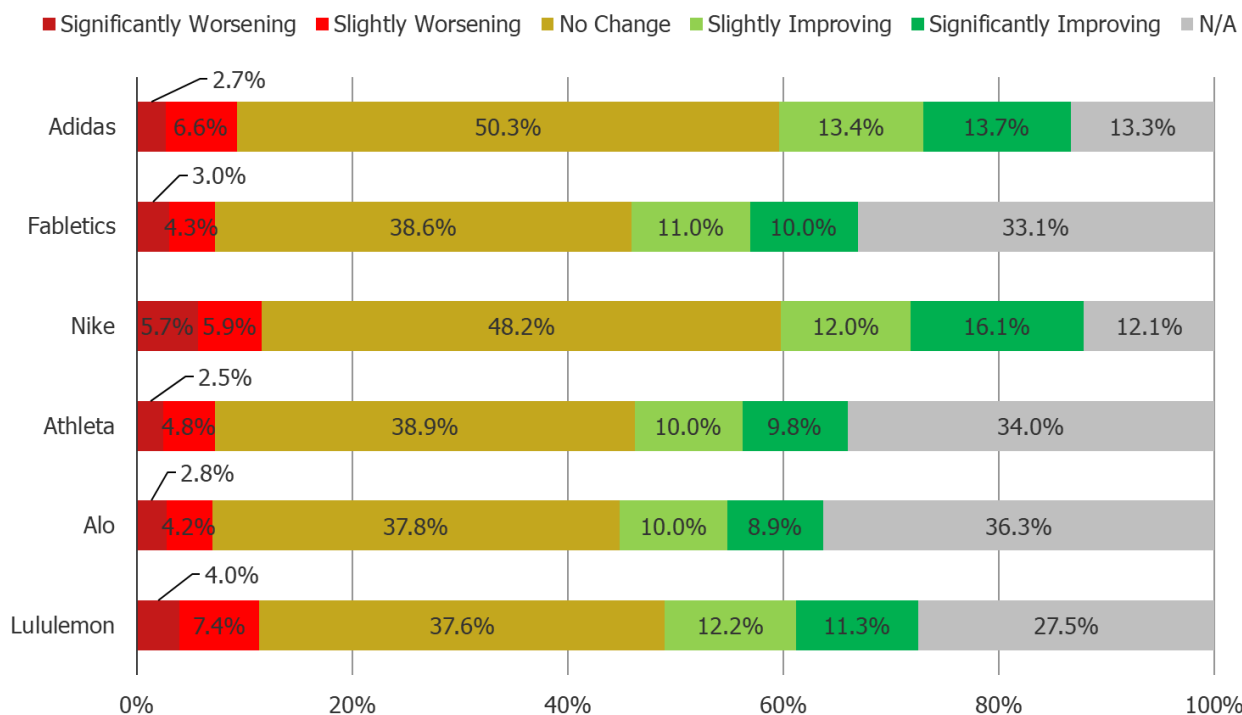
HOW HAS YOUR PERCEPTION OF ON (ON CLOUD) CHANGED OVER THE PAST 12 MONTHS?

Posed to all respondents

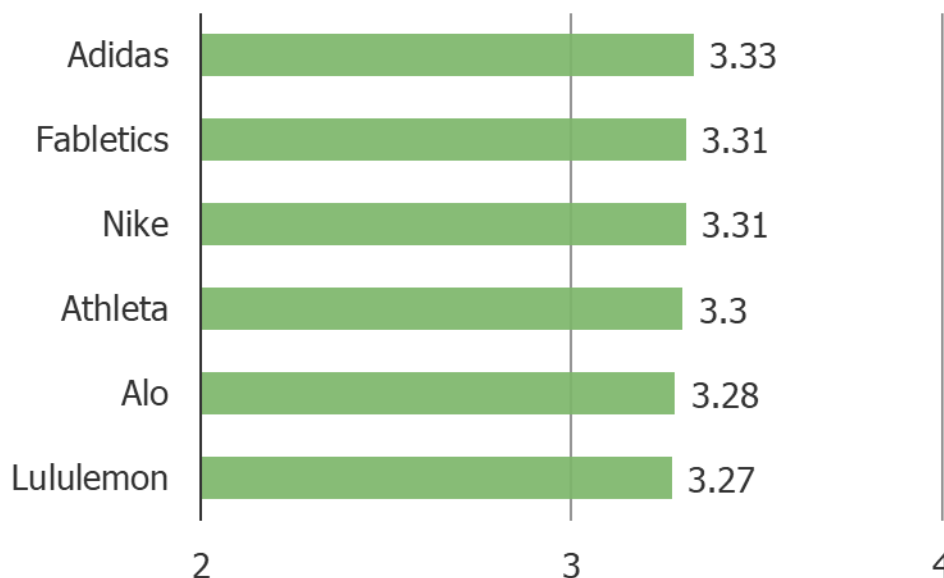


HAS YOUR OPINION OF THE FOLLOWING BRANDS BEEN CHANGING RECENTLY?

Posed to all respondents

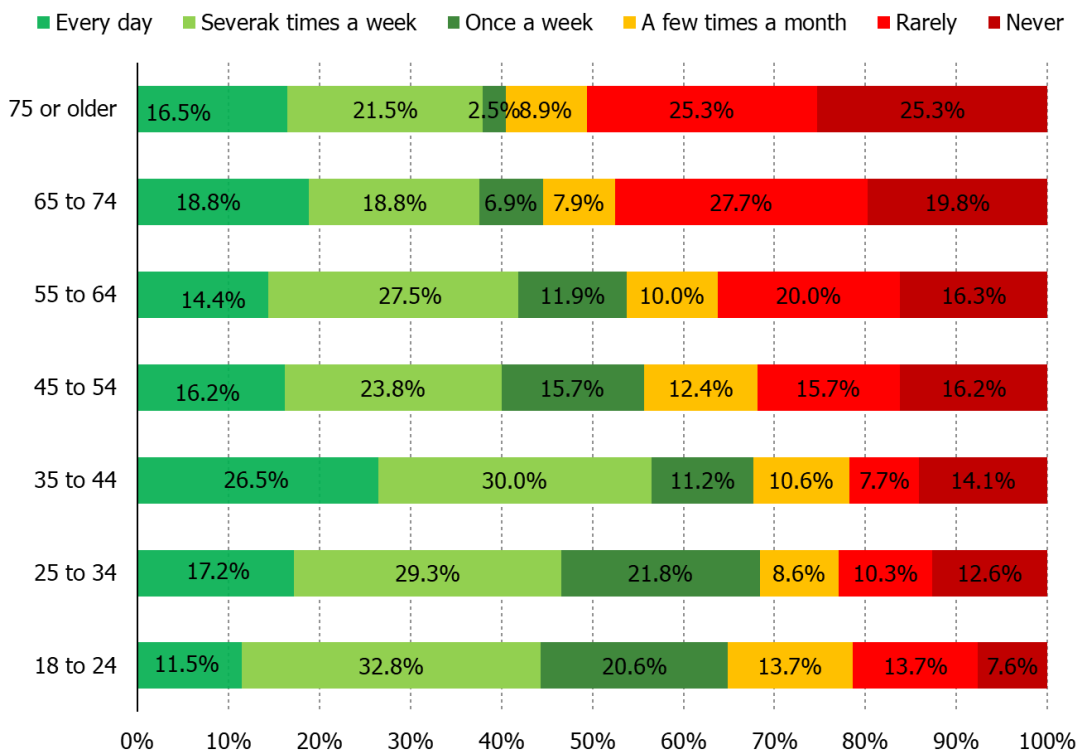
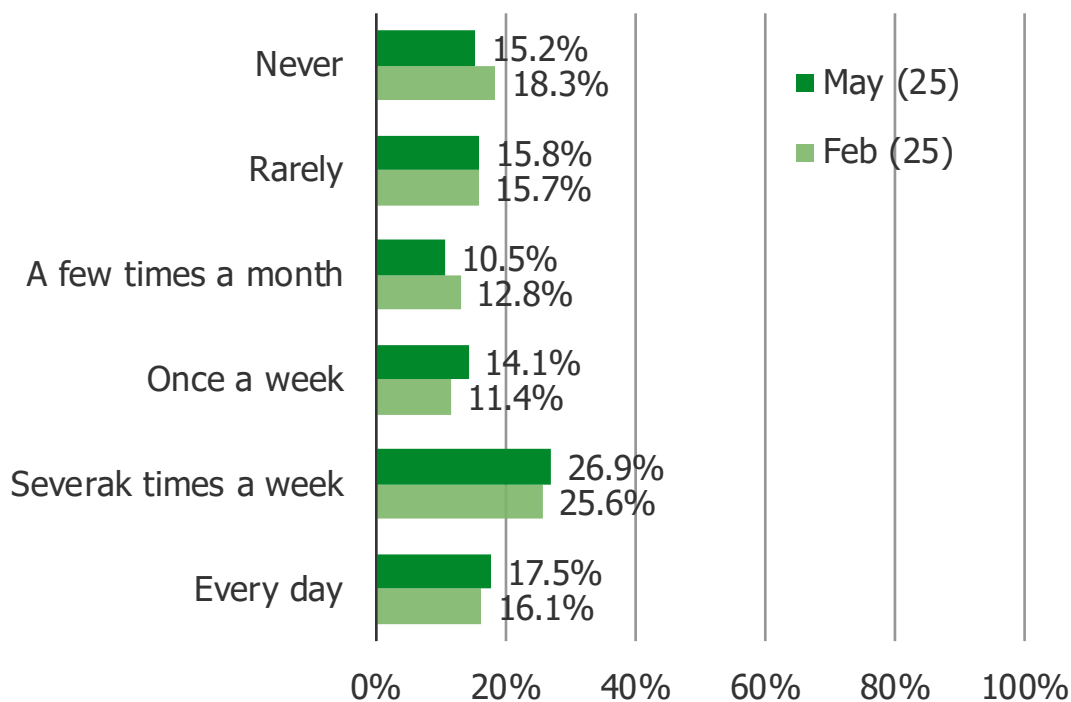


Weighted Averages, Excluding NA (1 = Significantly Worsening to 5 = Significantly Improving)



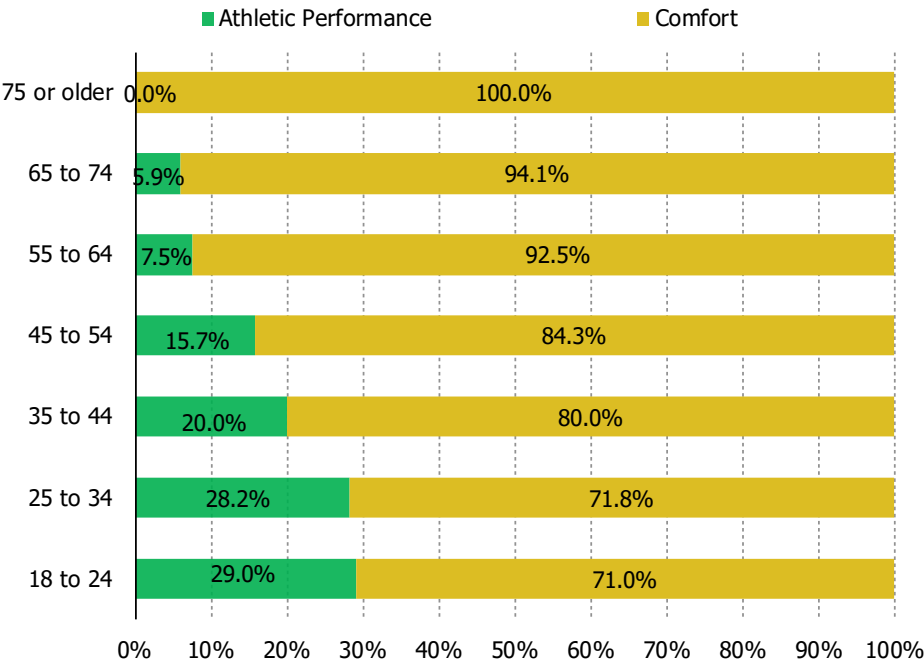
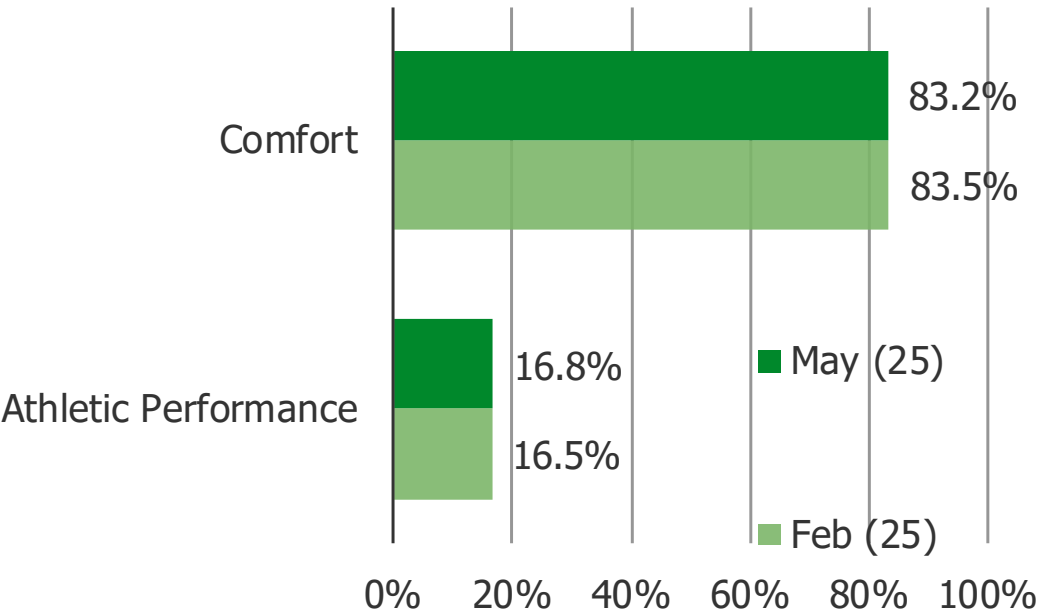
HOW OFTEN DO YOU WEAR ATHLEISURE / ATHLETIC CLOTHING?

Posed to all respondents



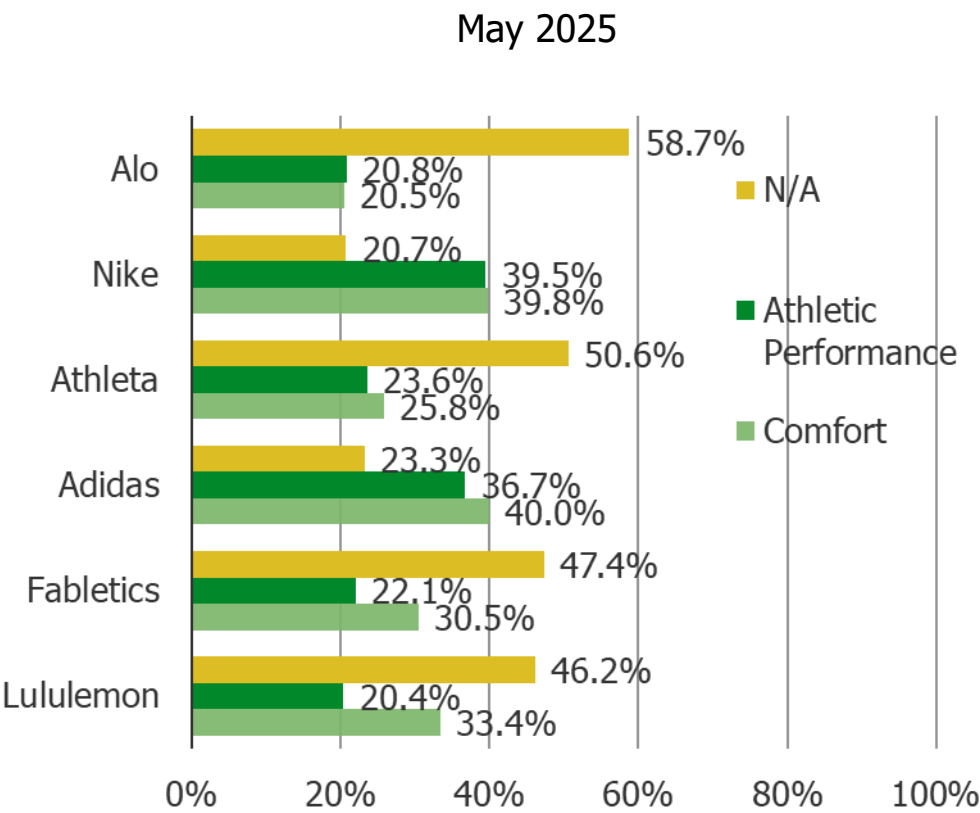
WHEN IT COMES TO BUYING ATHLETIC/ATHLEISURE WEAR, WHICH IS MORE IMPORTANT TO YOU?

Posed to all respondents



WHEN YOU THINK OF THE FOLLOWING ATHLEISURE BRANDS, DO YOU ASSOCIATE THEIR CLOTHES MORE WITH...

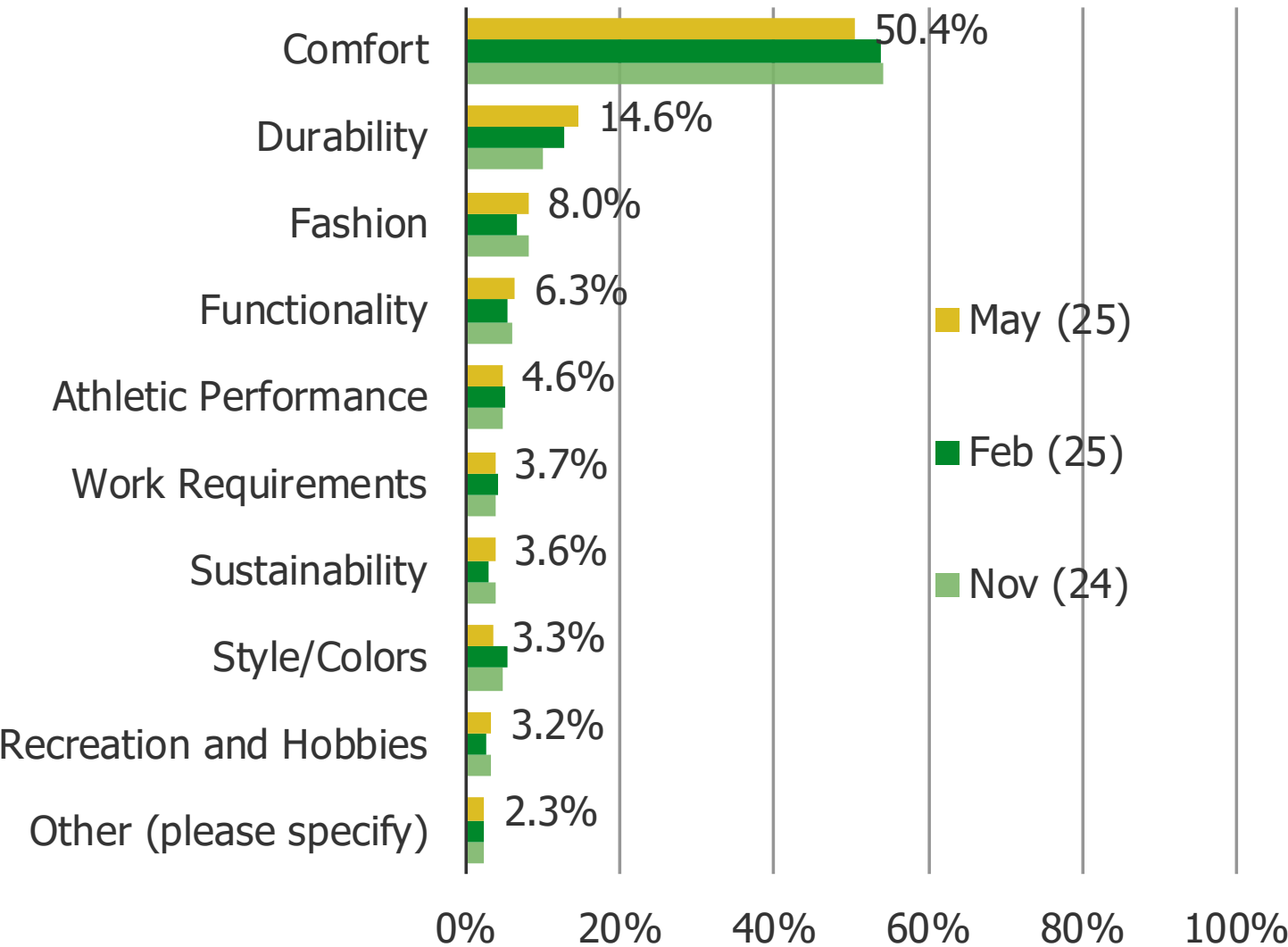
Posed to all respondents





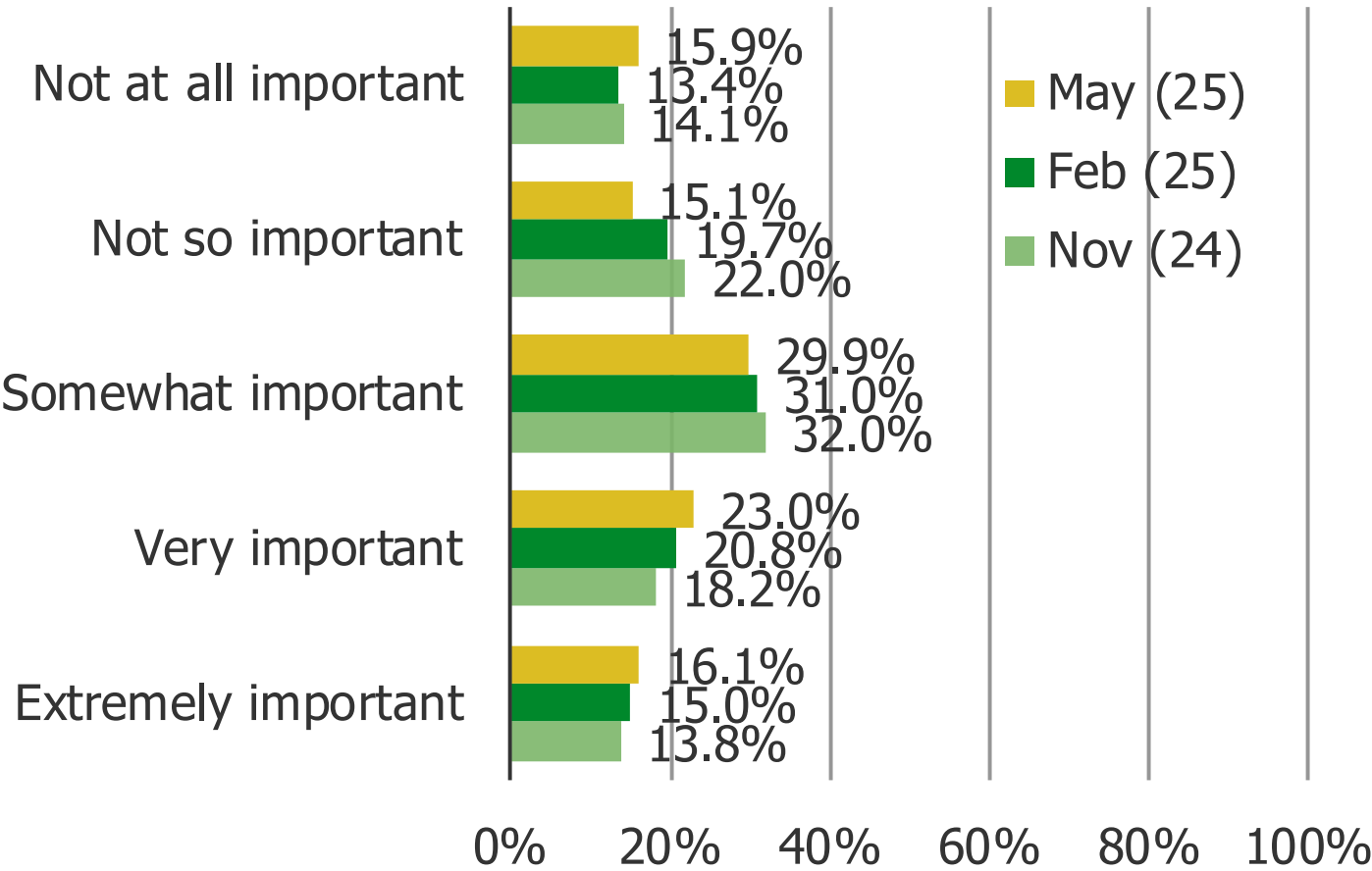
WHAT IS TYPICALLY THE PRIMARY DRIVER FOR FOOTWEAR PURCHASES THAT YOU MAKE?

Posed to all respondents



HOW IMPORTANT IS THE FASHION COMPONENT OF SNEAKERS TO YOU?

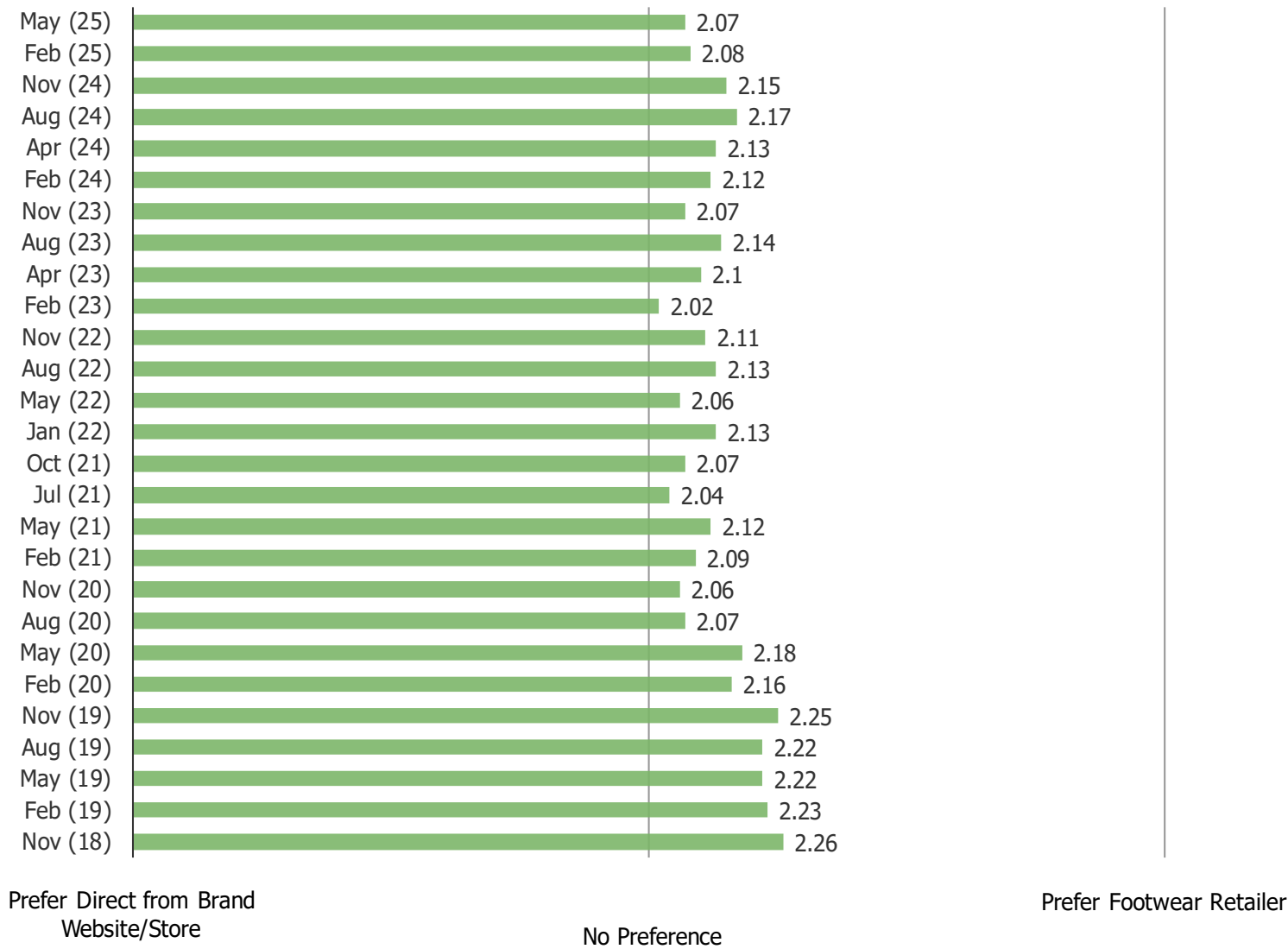
Posed to all respondents



# FOOTWEAR PURCHASE PREFERENCES

WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

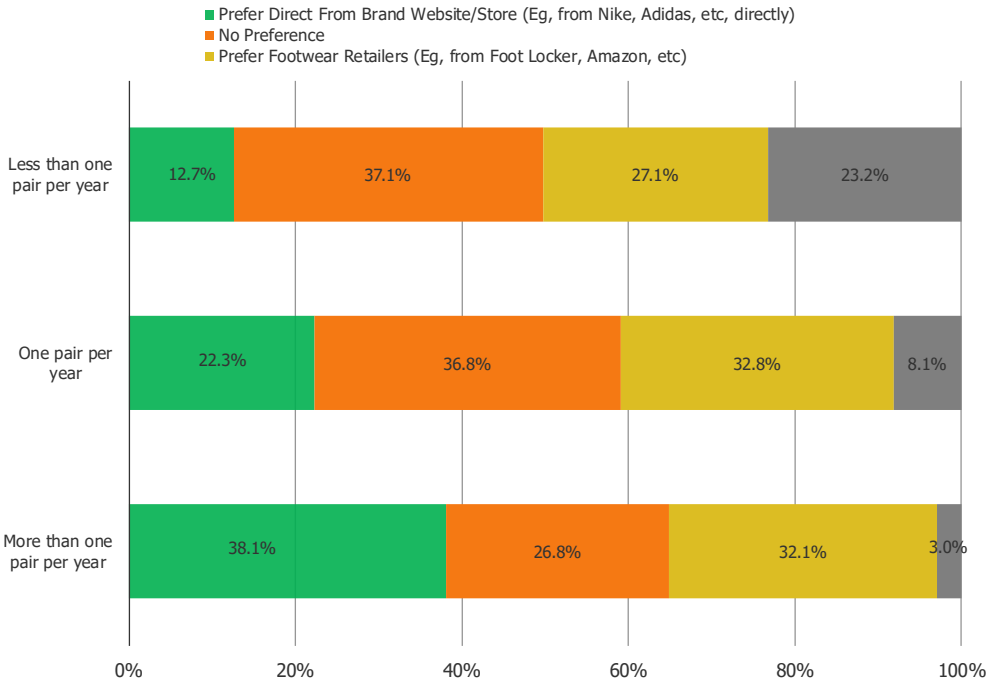
Posed to all respondents



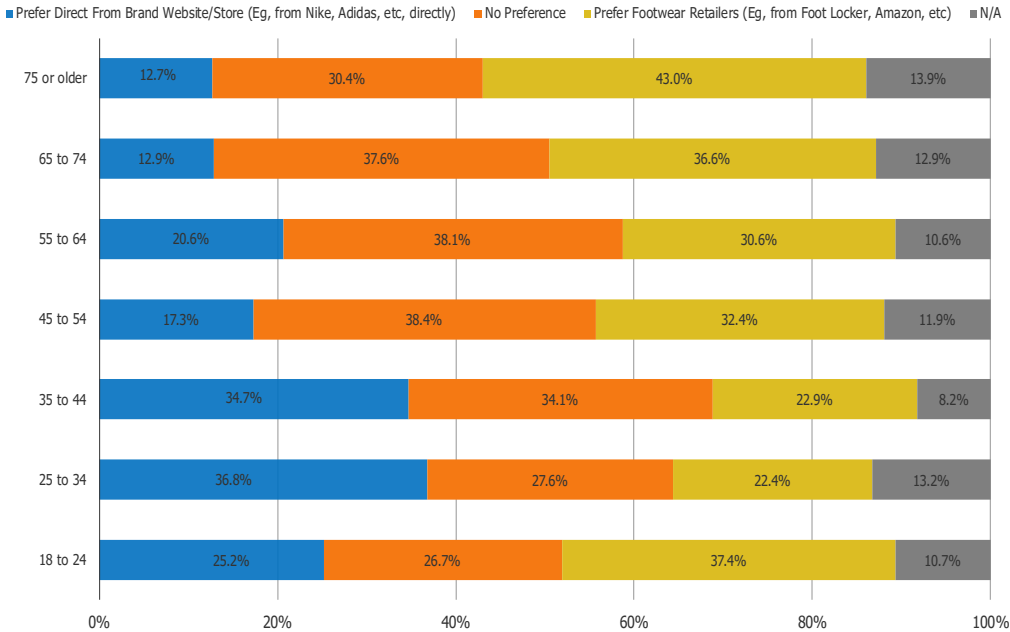
WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

Cross-Tab Analysis

By How Often Consumers Buy Footwear

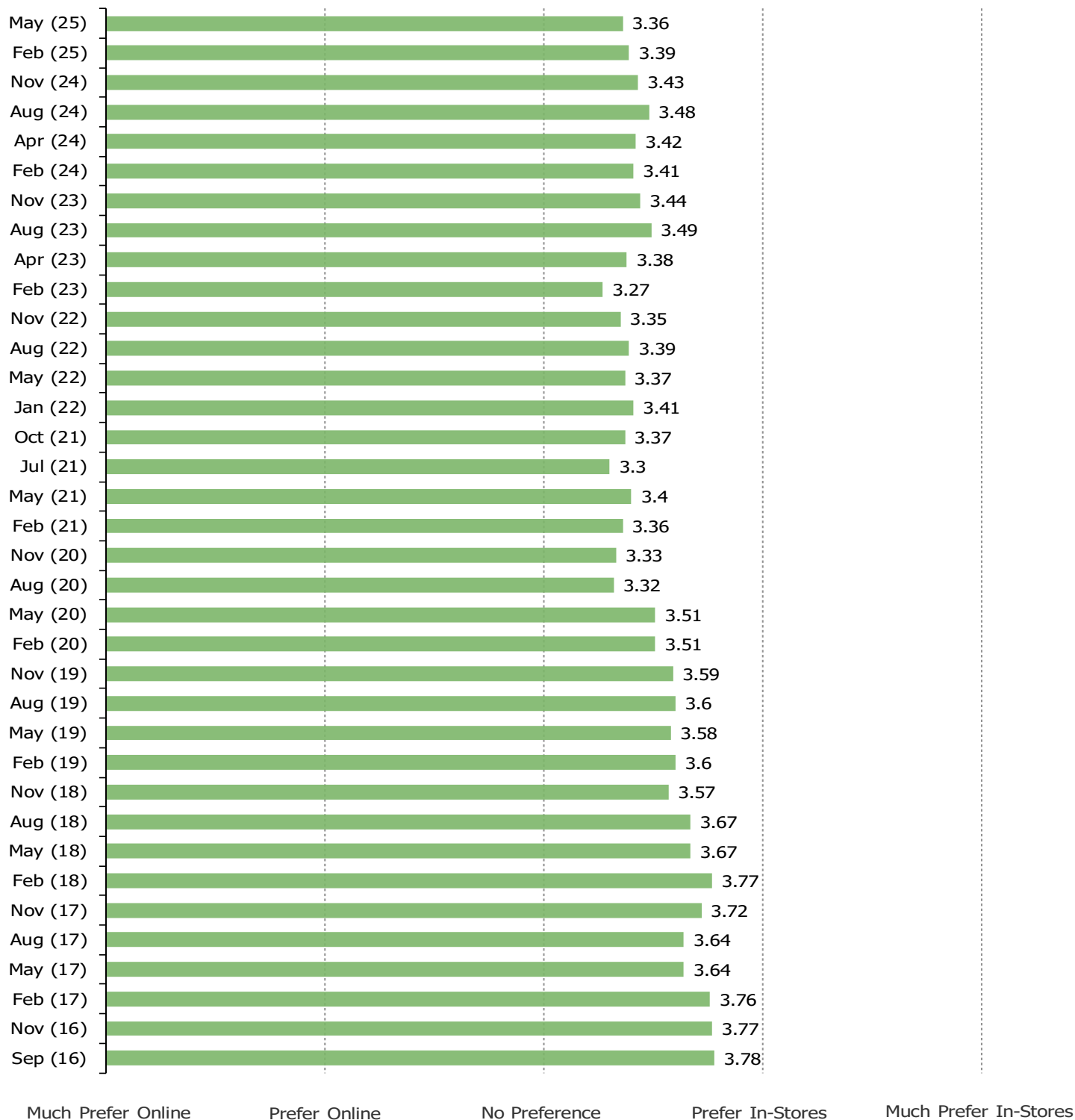


By Age



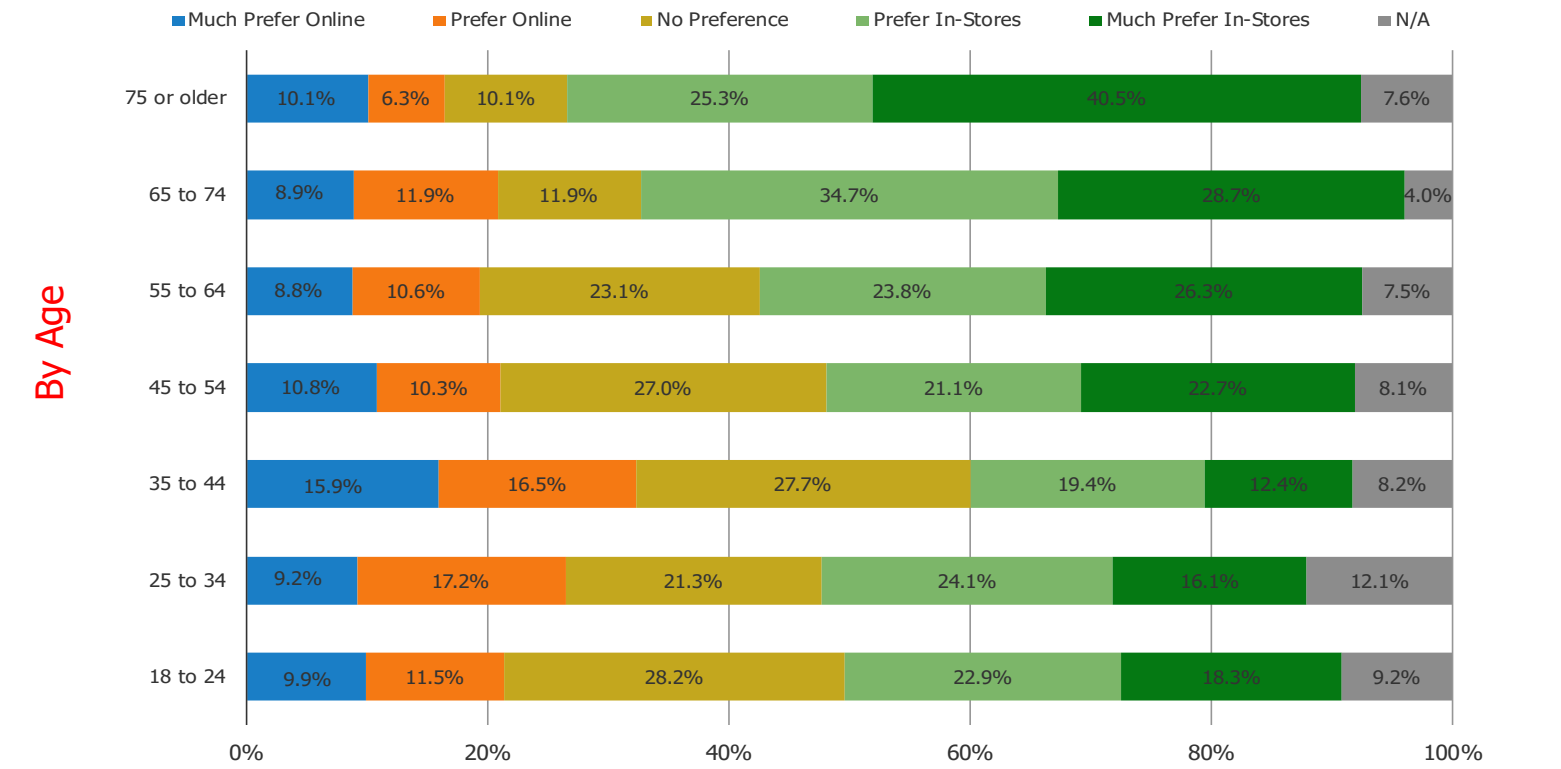
WHERE DO YOU PREFER TO BUY SNEAKERS?

Posed to all respondents



WHERE DO YOU PREFER TO BUY SNEAKERS?

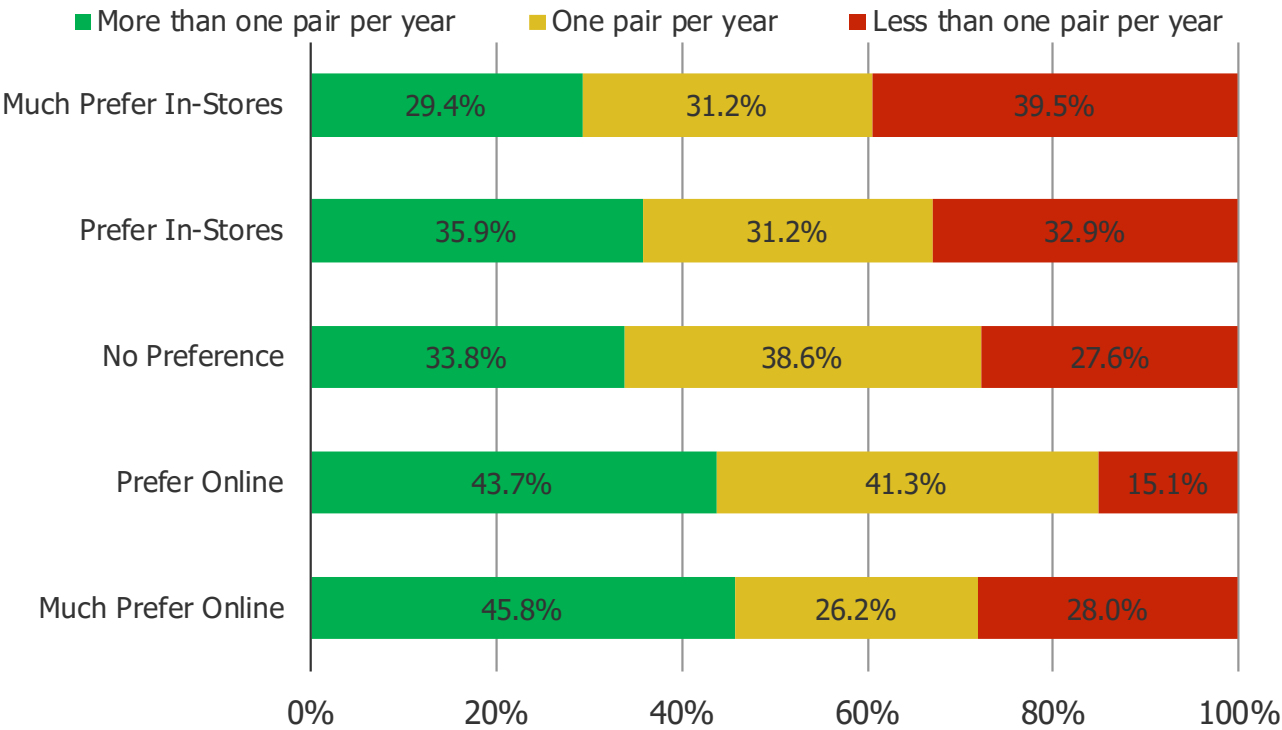
Cross-Tab Analysis



HOW MANY PAIRS OF FOOTWEAR DO YOU BUY PER YEAR?

Cross-Tab Analysis

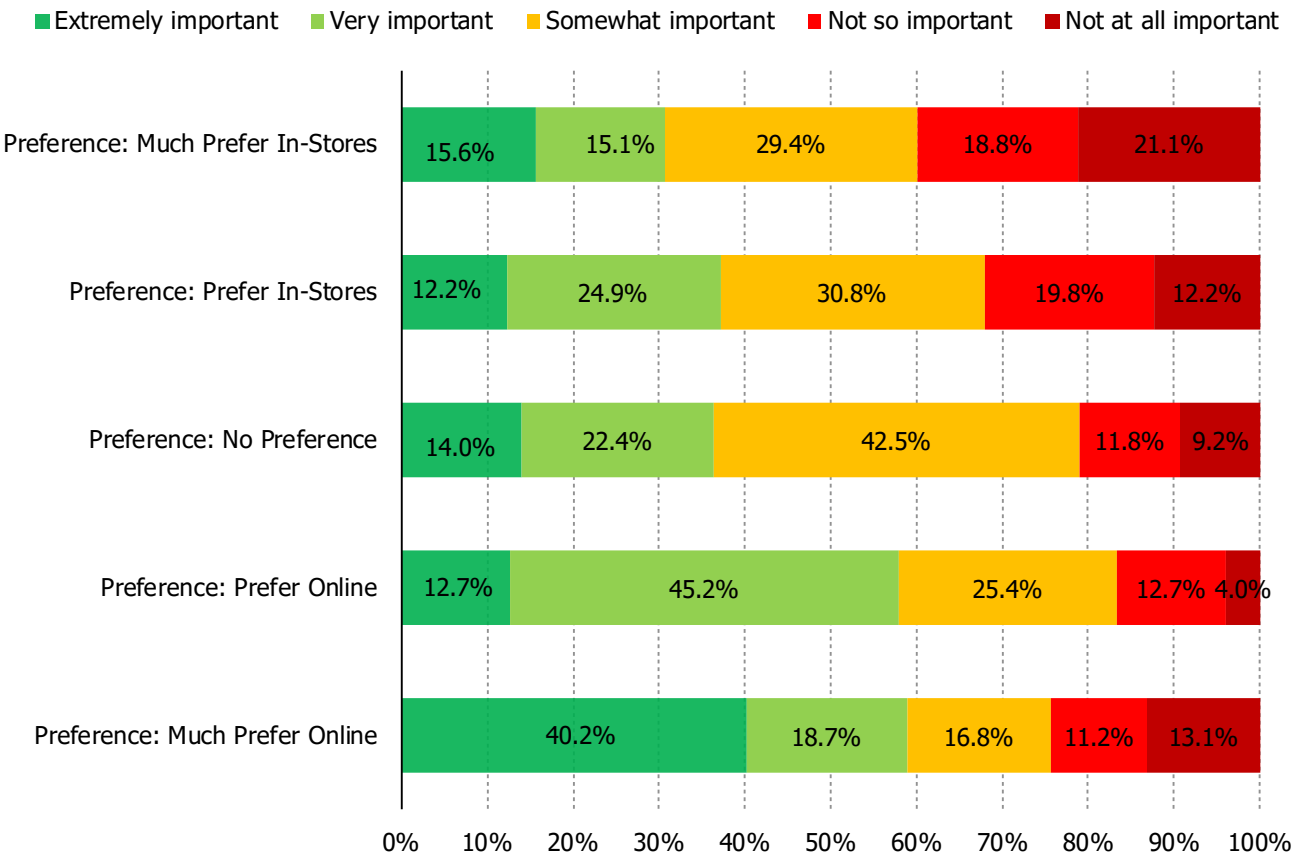
By How Consumers Prefer To Buy Footwear





HOW IMPORTANT IS THE FASHION COMPONENT OF SNEAKERS TO YOU?

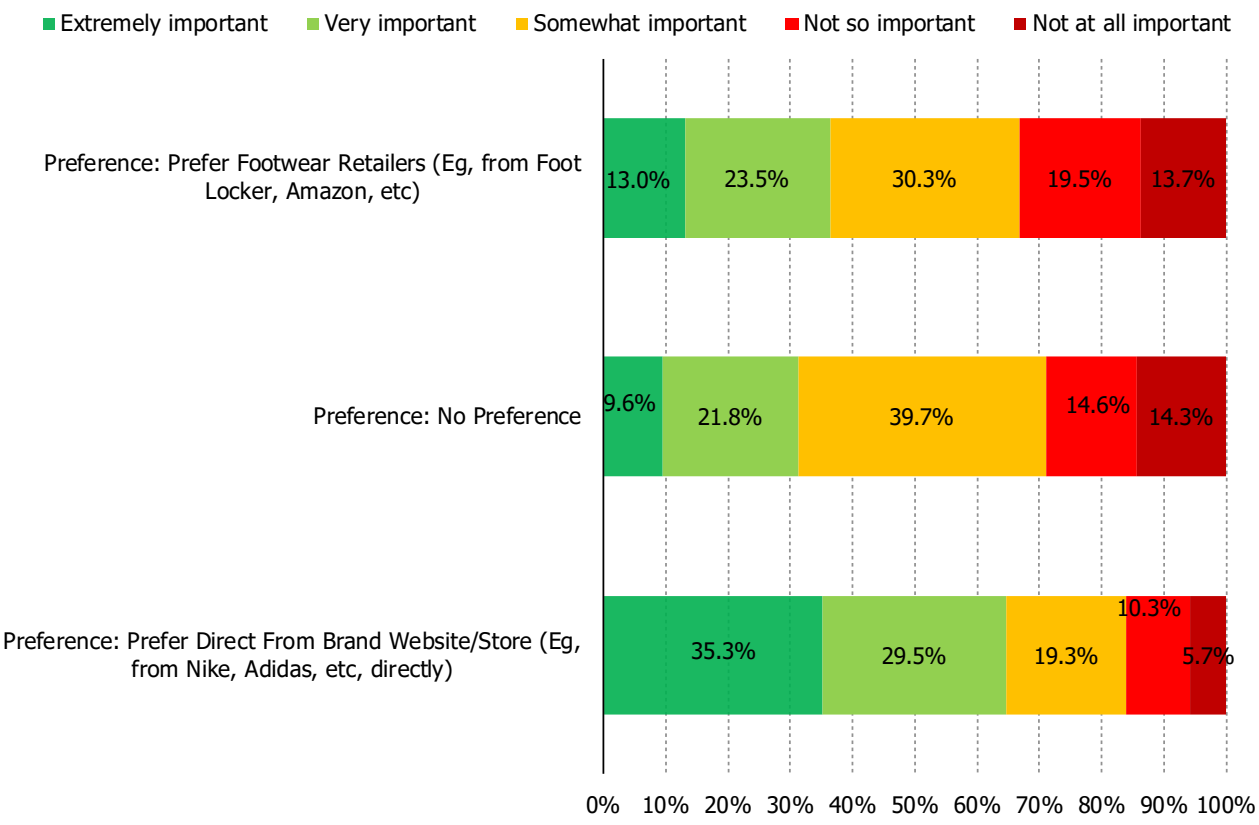
Cross-Tab Analysis



IE – respondents who much prefer buying footwear online are more likely to say the fashion component of sneakers is important to them...

HOW IMPORTANT IS THE FASHION COMPONENT OF SNEAKERS TO YOU?

Cross-Tab Analysis

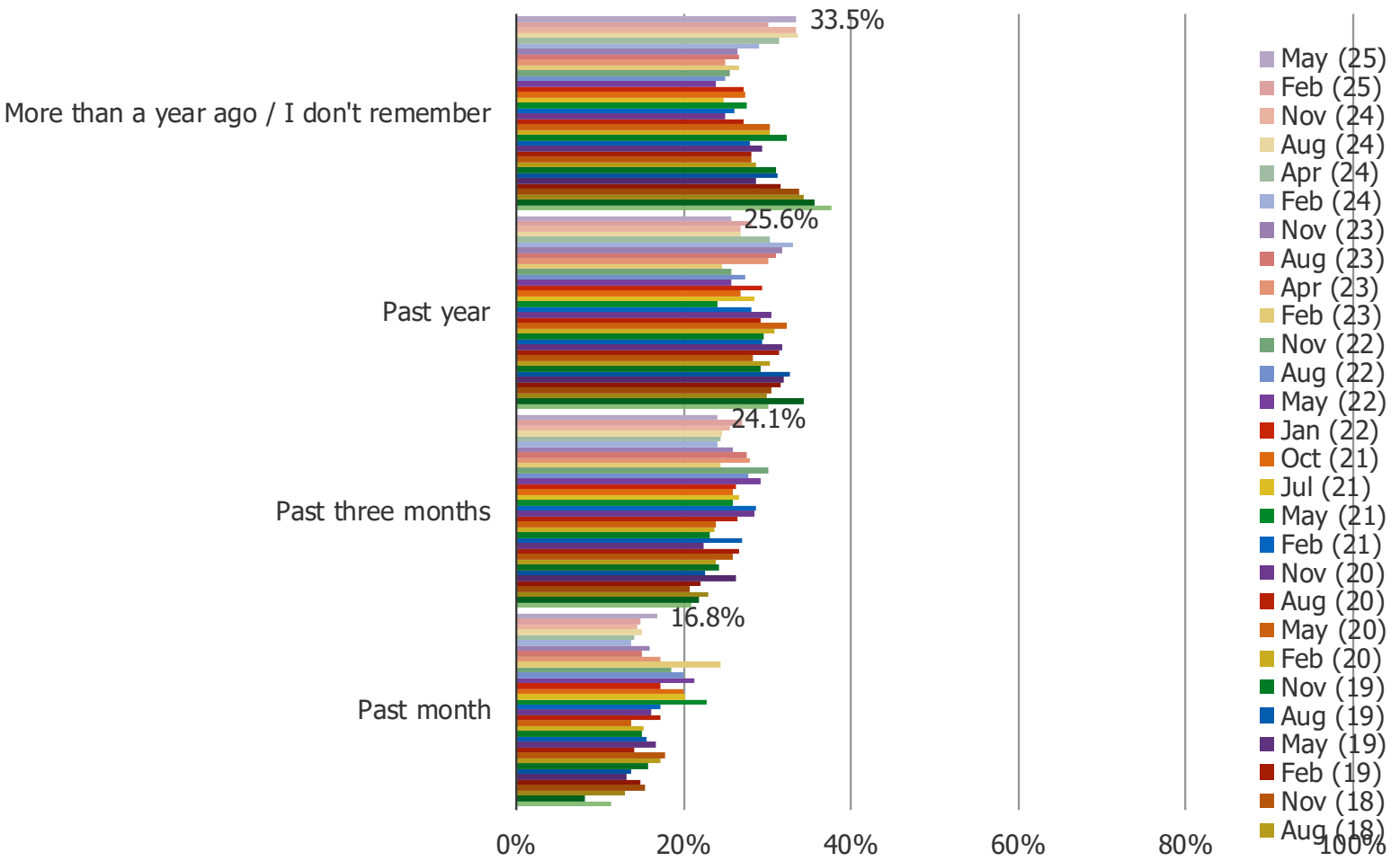


IE – respondents who prefer buying direct from the brand are more likely to say the fashion component of sneakers is important to them...

## SNEAKER BUYING TRENDS

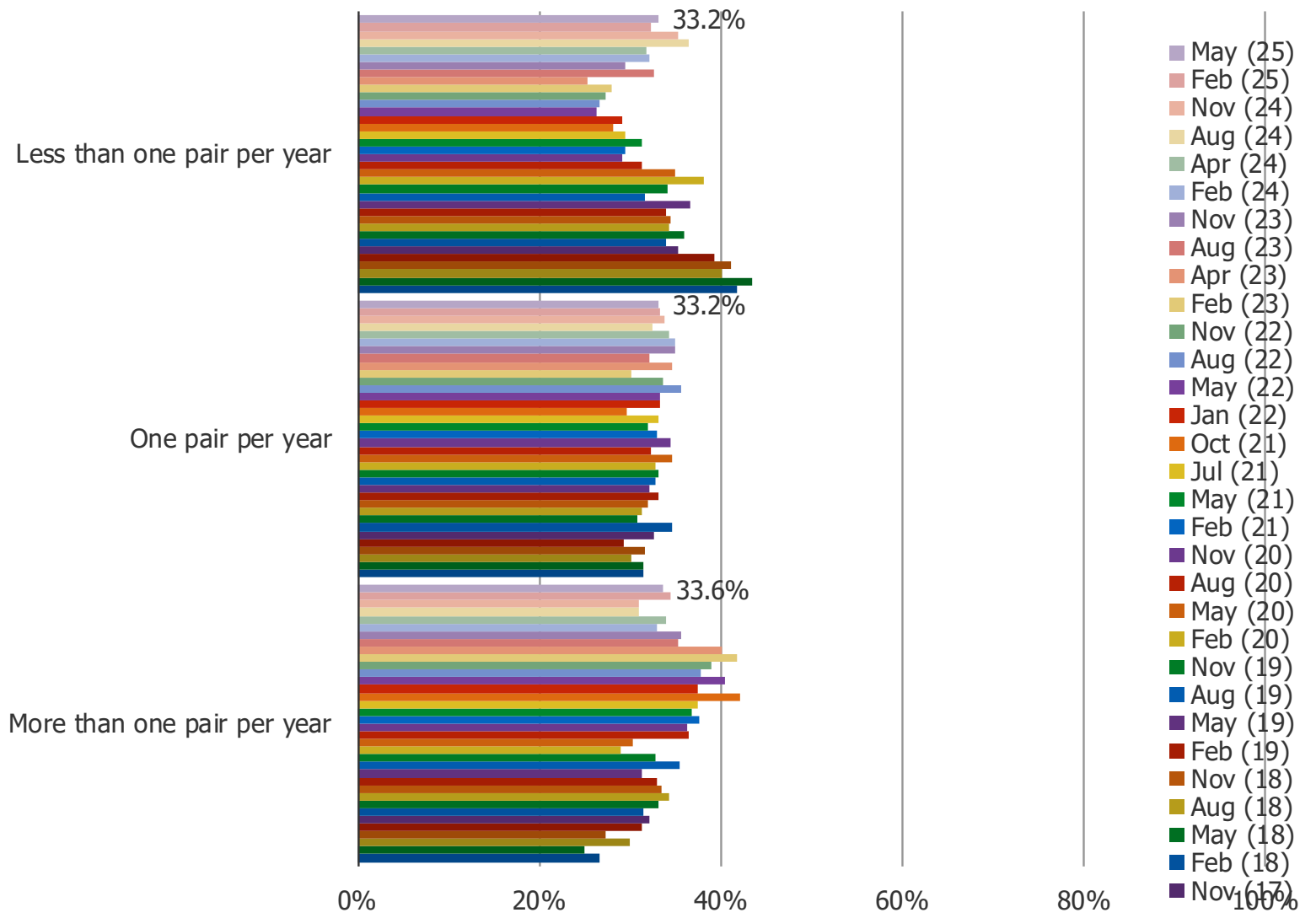
WHEN IS THE LAST TIME YOU BOUGHT A NEW PAIR OF SNEAKERS?

Posed to all respondents



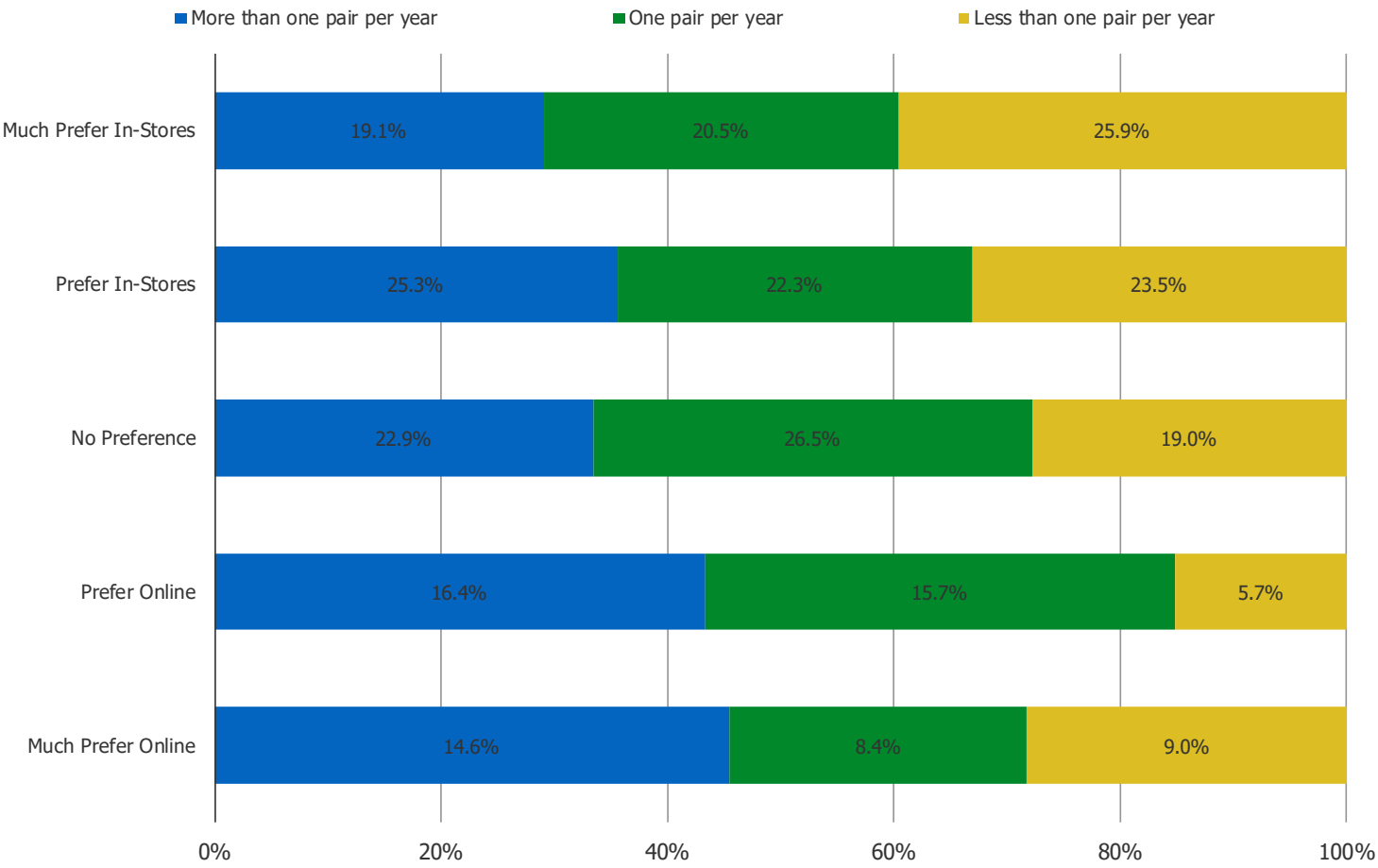
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

Posed to all respondents



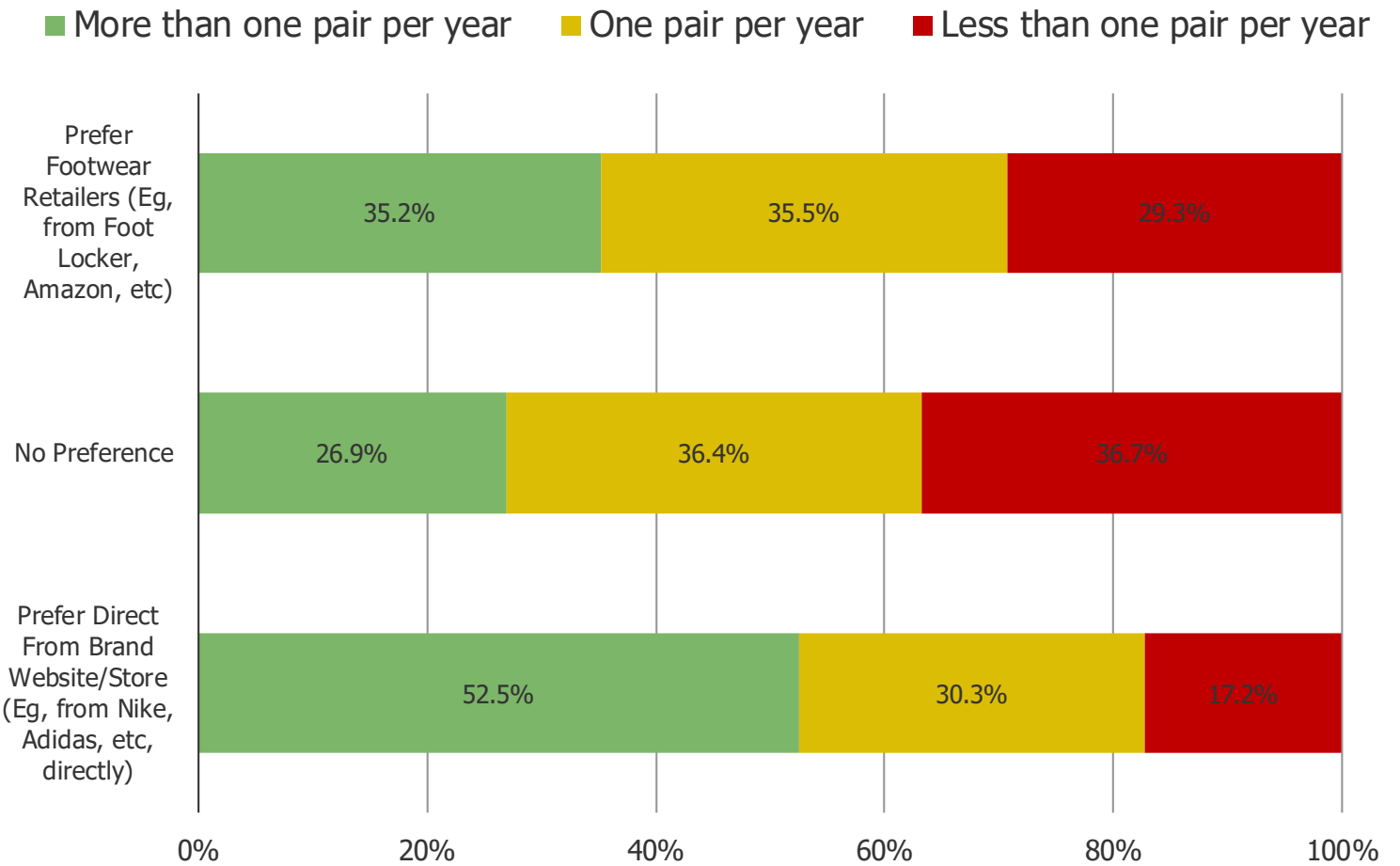
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

Posed to all respondents – Cross-tabbed by if they prefer to buy online vs. in-stores.



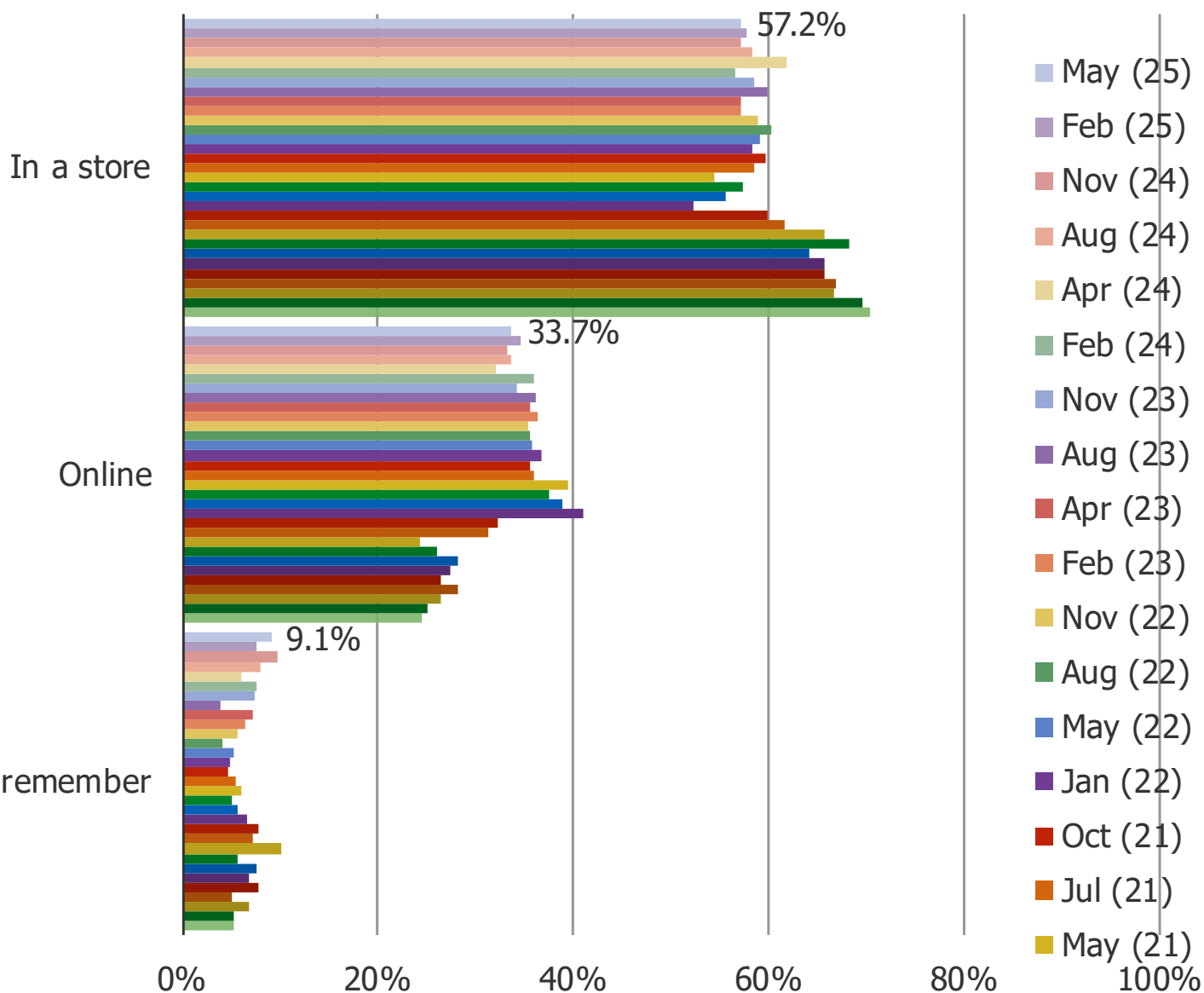
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

Posed to all respondents – Cross-tabbed by if they prefer to buy direct or from retailers.



THINKING OF THE LAST TIME YOU BOUGHT A PAIR OF SNEAKERS, DID YOU BUY THEM ONLINE OR IN A STORE?

Posed to all respondents

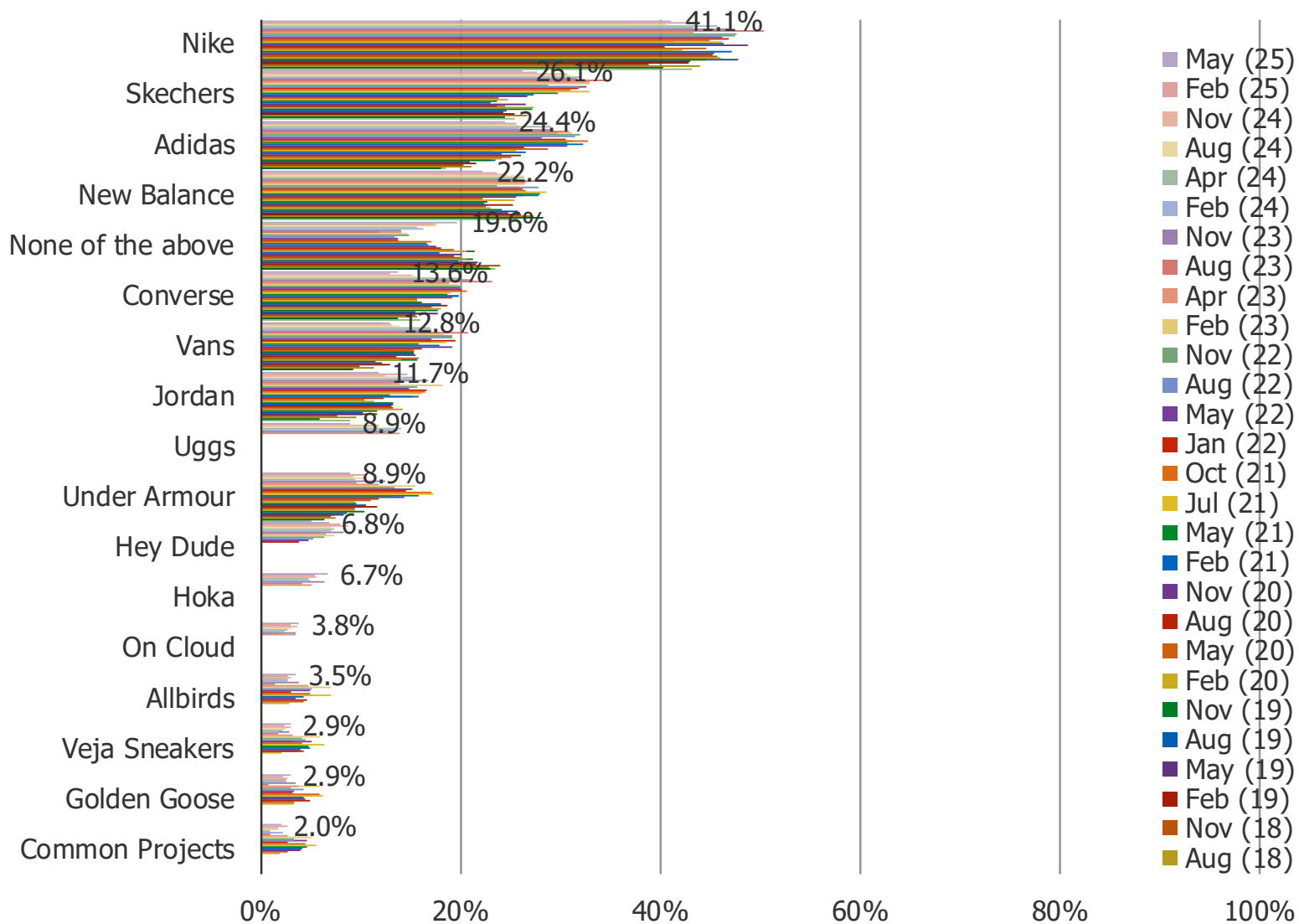




# SNEAKER BRANDS

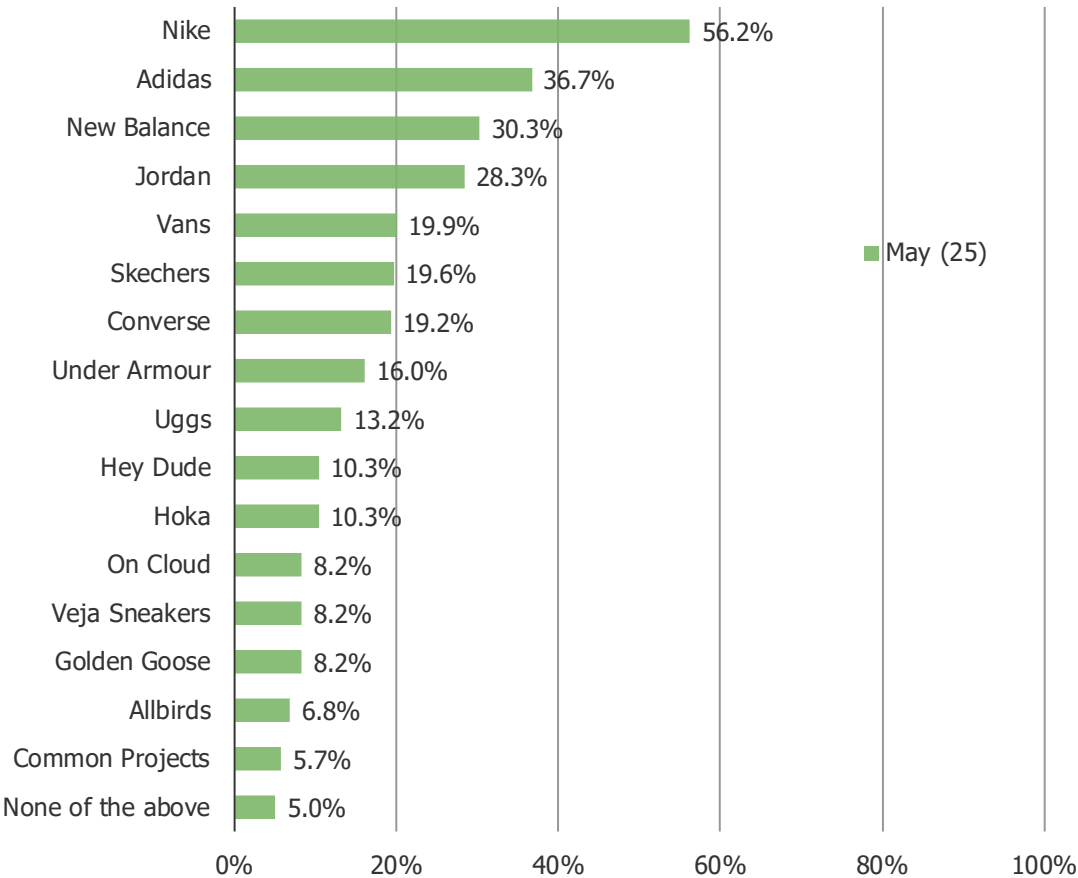
WHICH OF THE FOLLOWING BRANDS DO YOU OWN SNEAKERS FROM?

Posed to all respondents



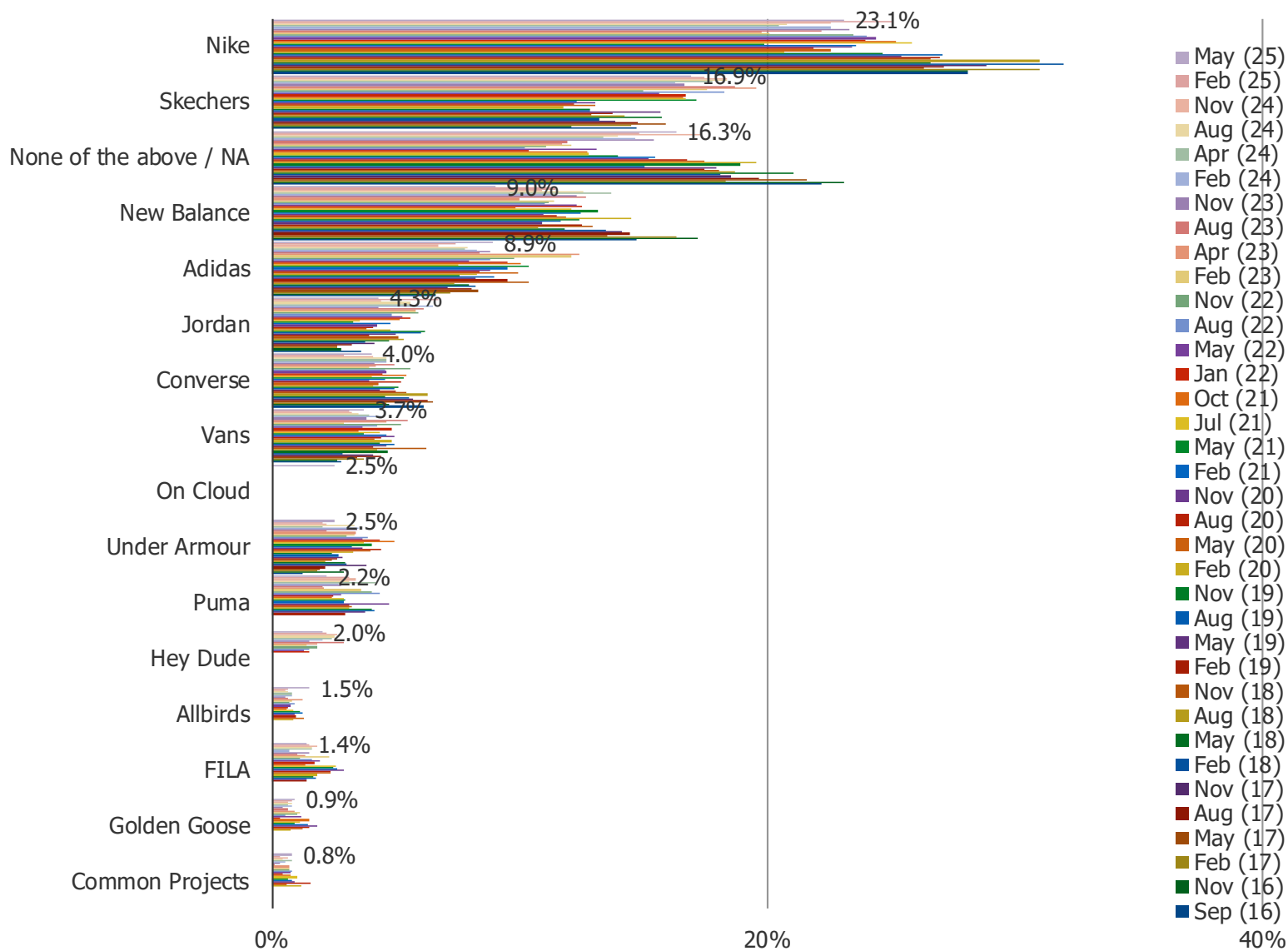
WHICH OF THE FOLLOWING FOOTWEAR BRANDS DO YOU OWN SNEAKERS/FOOTWEAR FROM?

Posed to respondents who said they run for exercise frequently or very frequently.



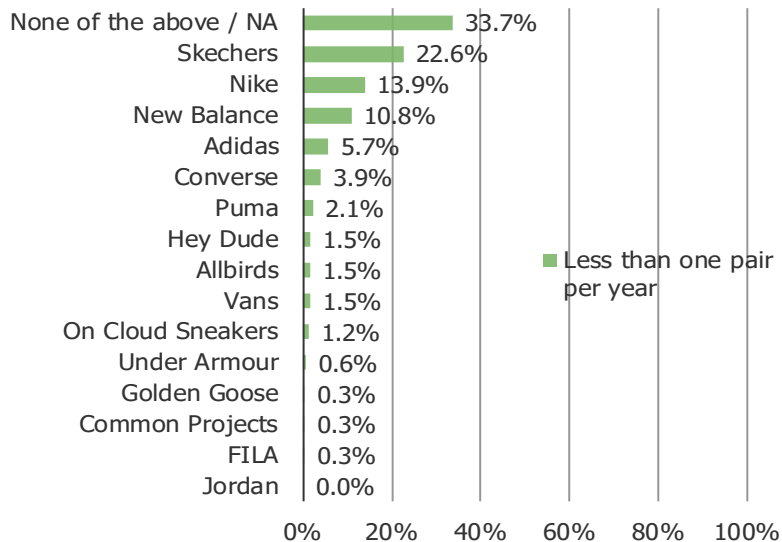
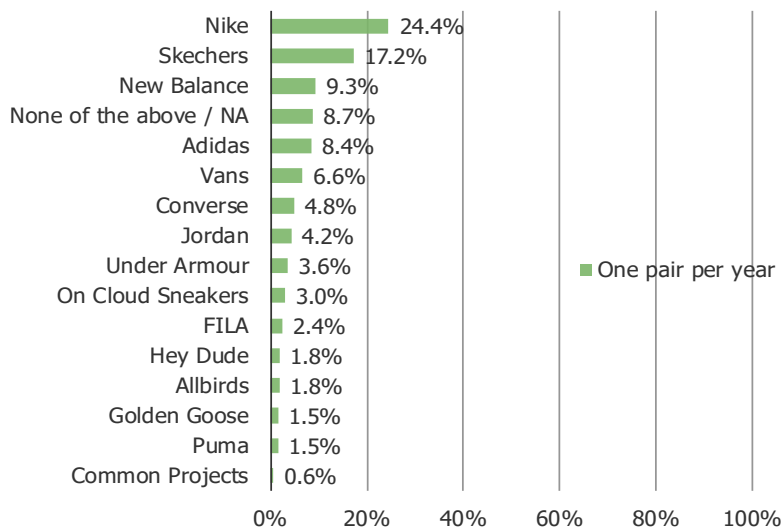
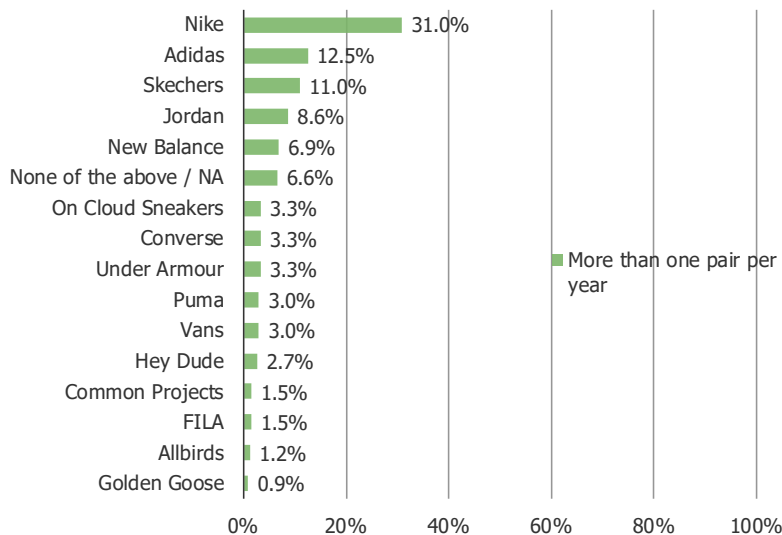
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

Posed to all respondents



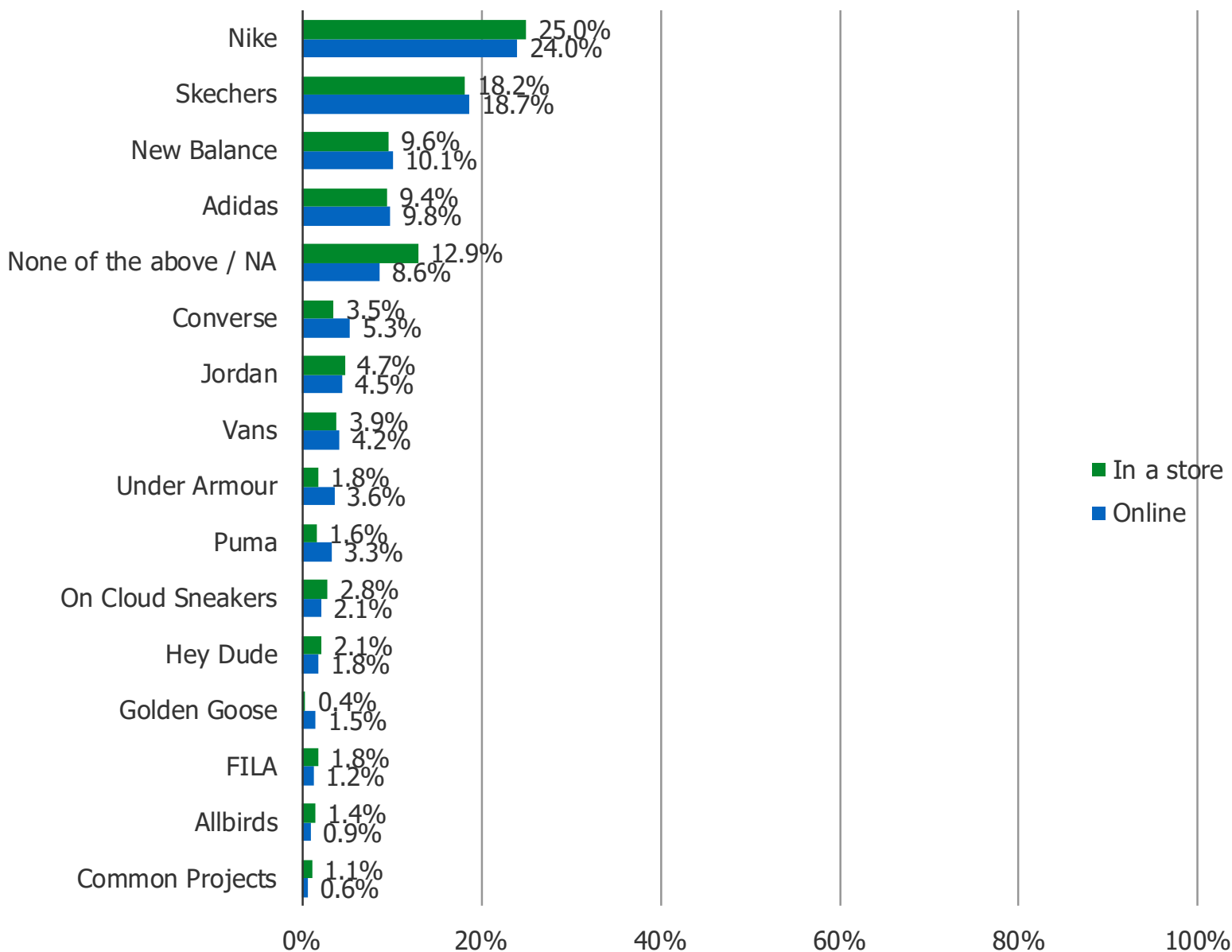
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

Posed to all respondents – Cross-tabbed by how often they buy sneakers.



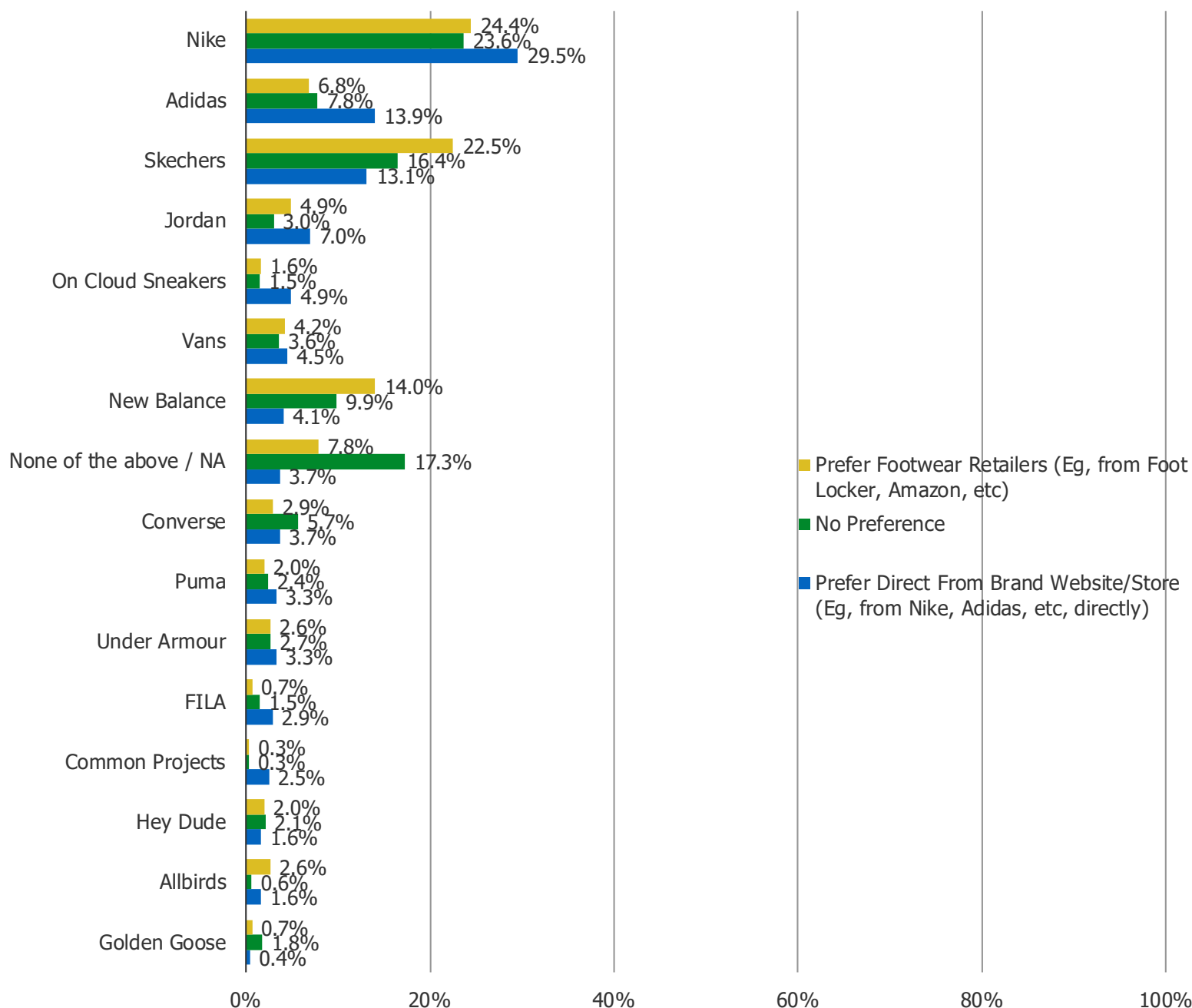
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

Posed to all respondents – Cross-tabbed by those who prefer to buy online vs. in-stores.



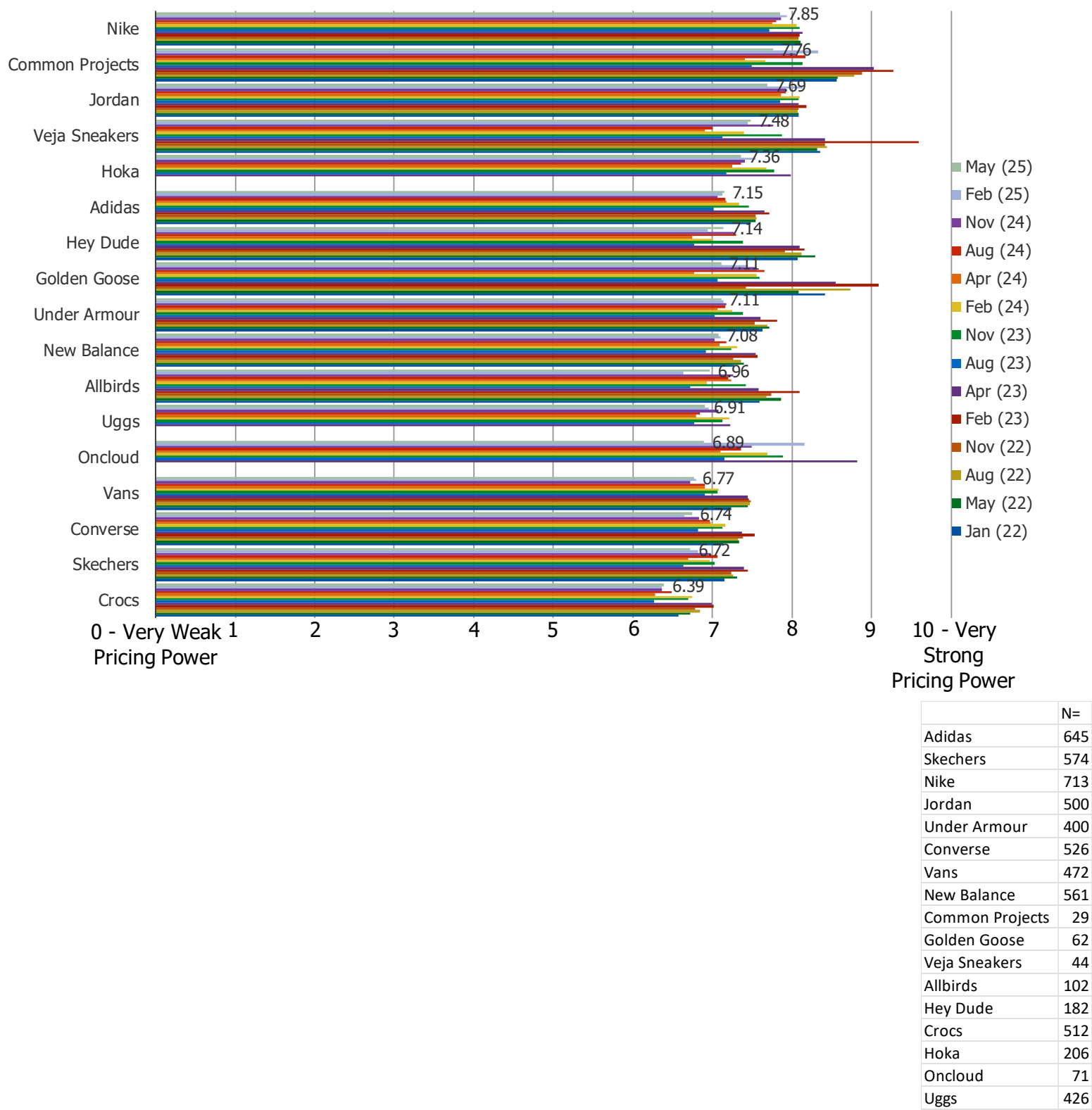
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

Posed to all respondents – Cross-tabbed by those who prefer to buy direct vs. from retailers.



IN YOUR OPINION, HOW MUCH PRICING POWER DO THE FOLLOWING FOOTWEAR BRANDS POSSESS? IE – HOW MUCH CAN THEY RAISE PRICES WITHOUT IMPACTING HOW DESIRABLE THEY ARE TO PURCHASE?

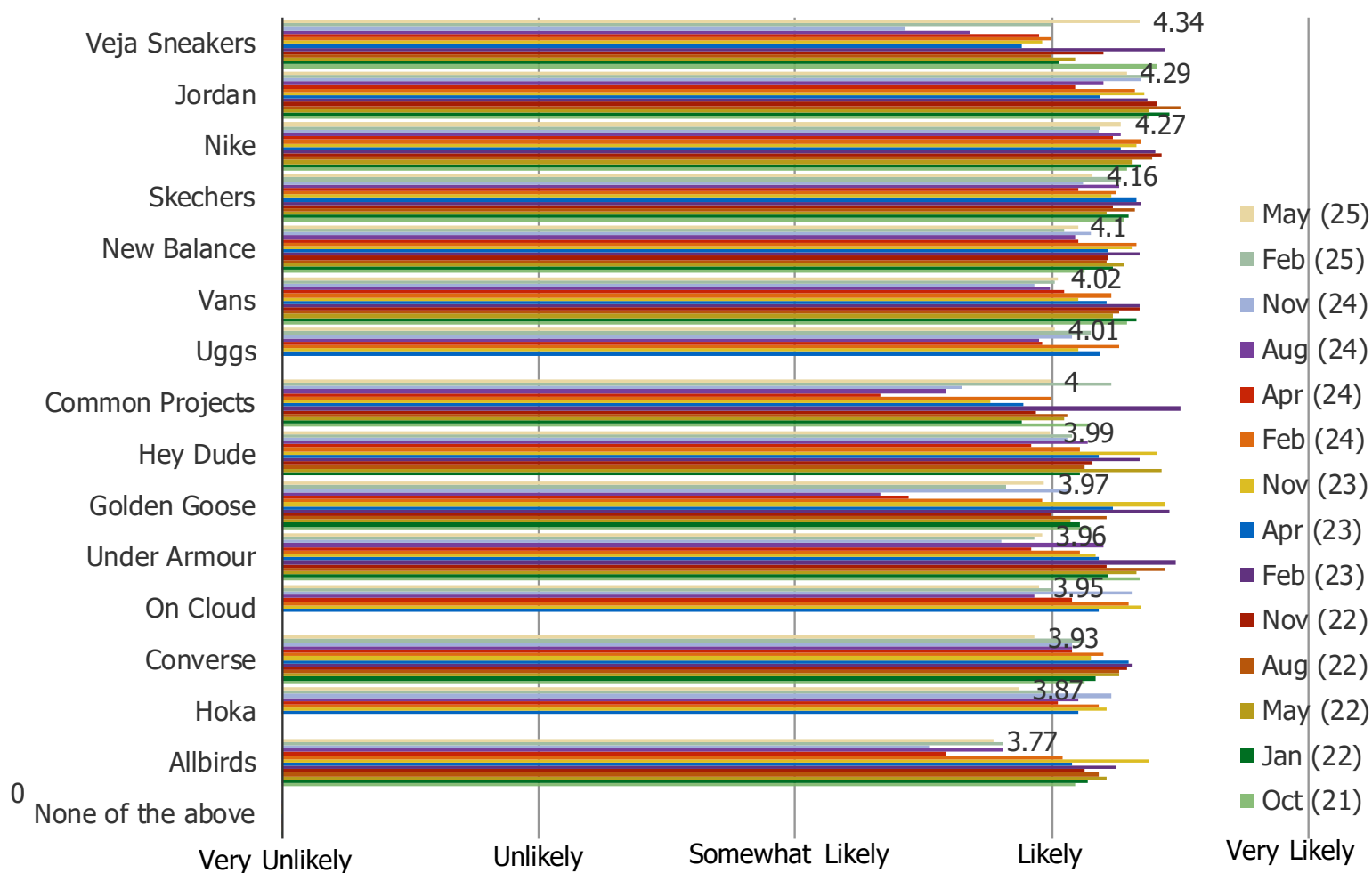
Posed to respondents who have heard of each of the following:





HOW LIKELY ARE YOU TO BUY SNEAKERS FROM THE FOLLOWING BRANDS AGAIN IN THE FUTURE?

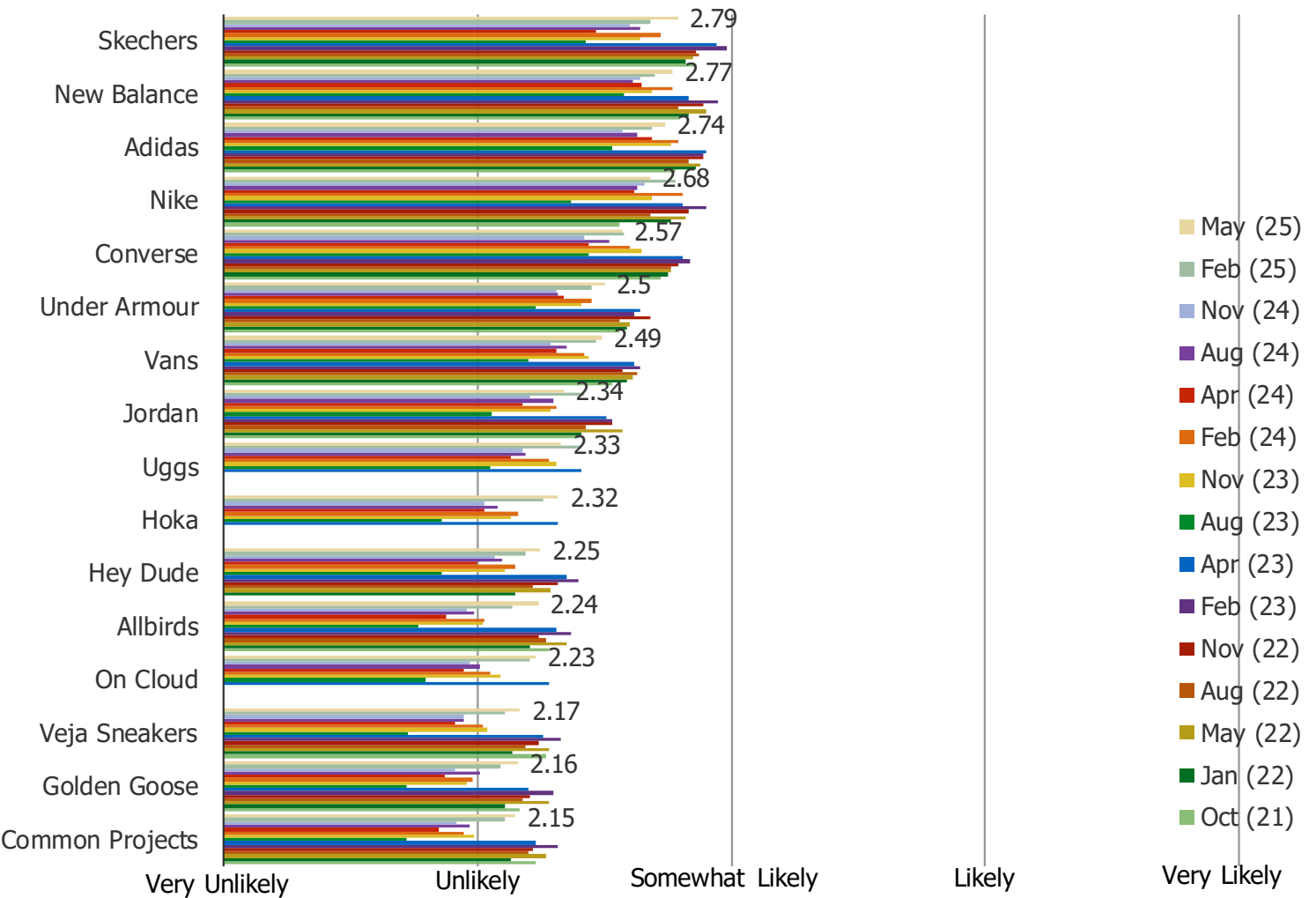
Posed to respondents who own footwear from each of the following.



	N=
Adidas	244
Skechers	261
Nike	411
Jordan	117
Under Armour	89
Converse	136
Vans	128
New Balance	222
Common Projects	20
Golden Goose	29
Veja Sneakers	29
Allbirds	35
Hey Dude	68
Hoka	67
On Cloud	38
Uggs	89

HOW LIKELY ARE YOU TO BUY SNEAKERS FROM THE FOLLOWING BRANDS IN THE FUTURE?

Posed to respondents who DO NOT own footwear from each of the following.

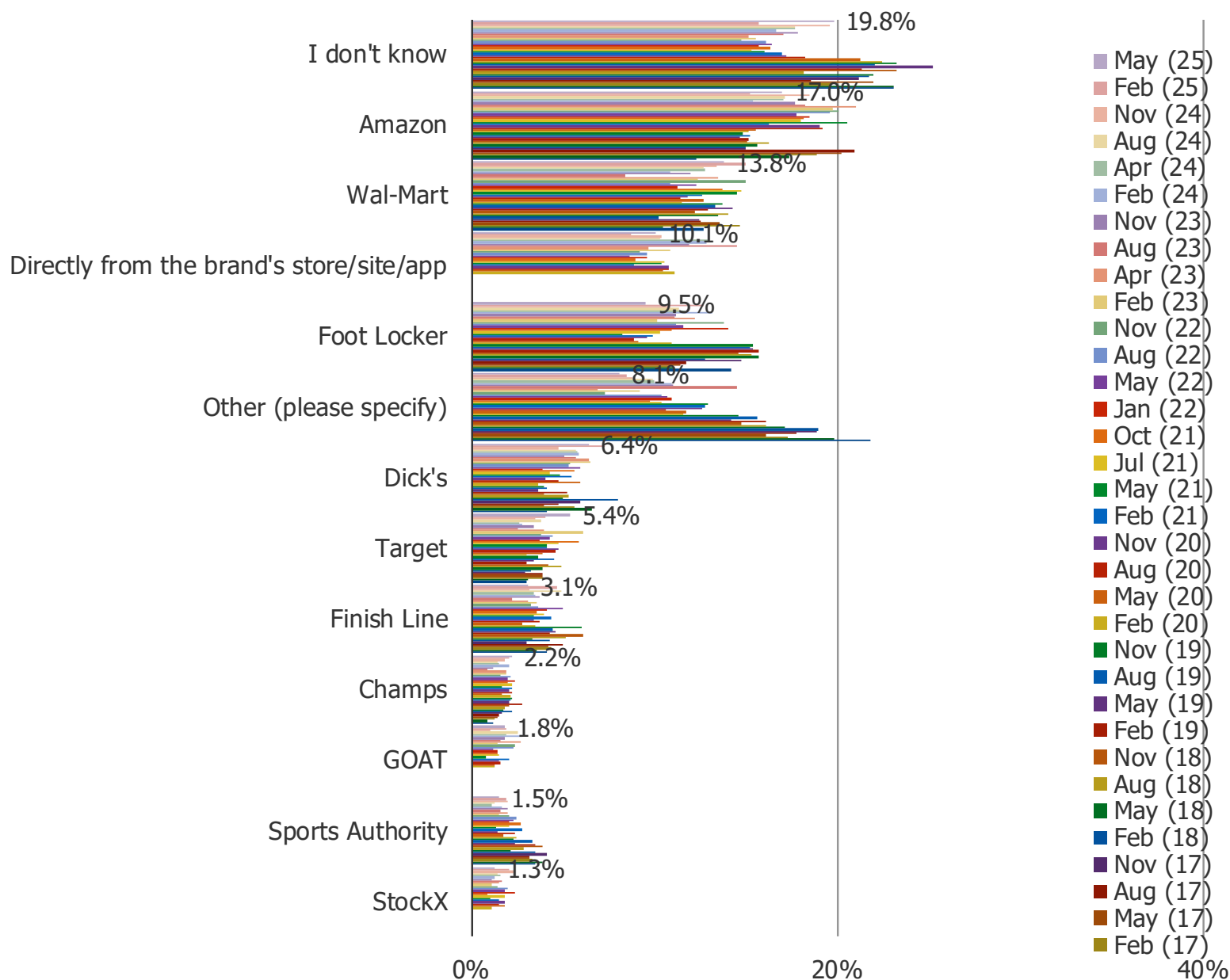


	N=
Adidas	756
Skechers	739
Nike	589
Jordan	883
Under Armour	911
Converse	864
Vans	872
New Balance	778
Common Projects	980
Golden Goose	971
Veja Sneakers	971
Allbirds	965
Hey Dude	932
Hoka	933
On Cloud	962
Uggs	911

# FOOTWEAR RETAILERS

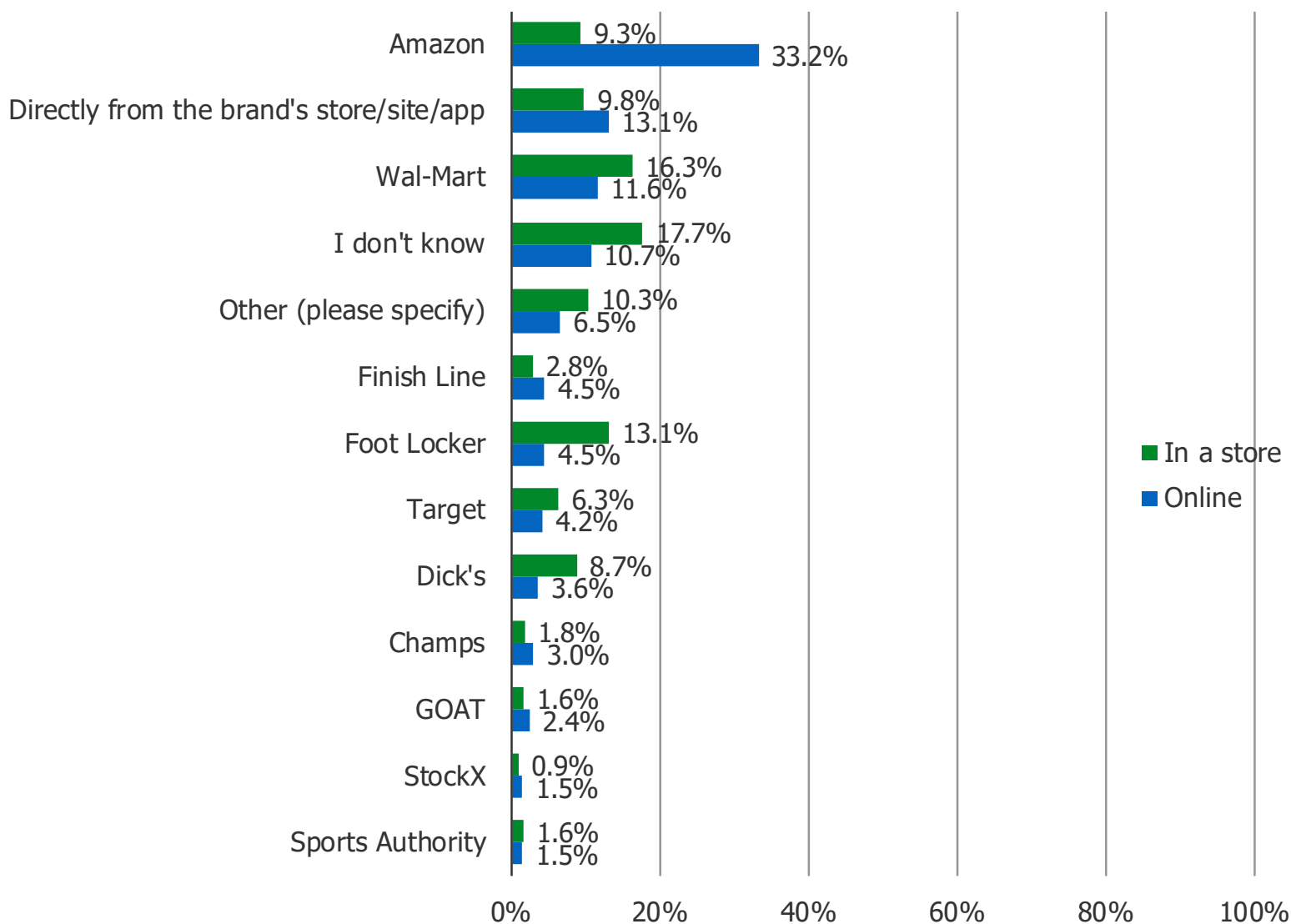
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

Posed to all respondents



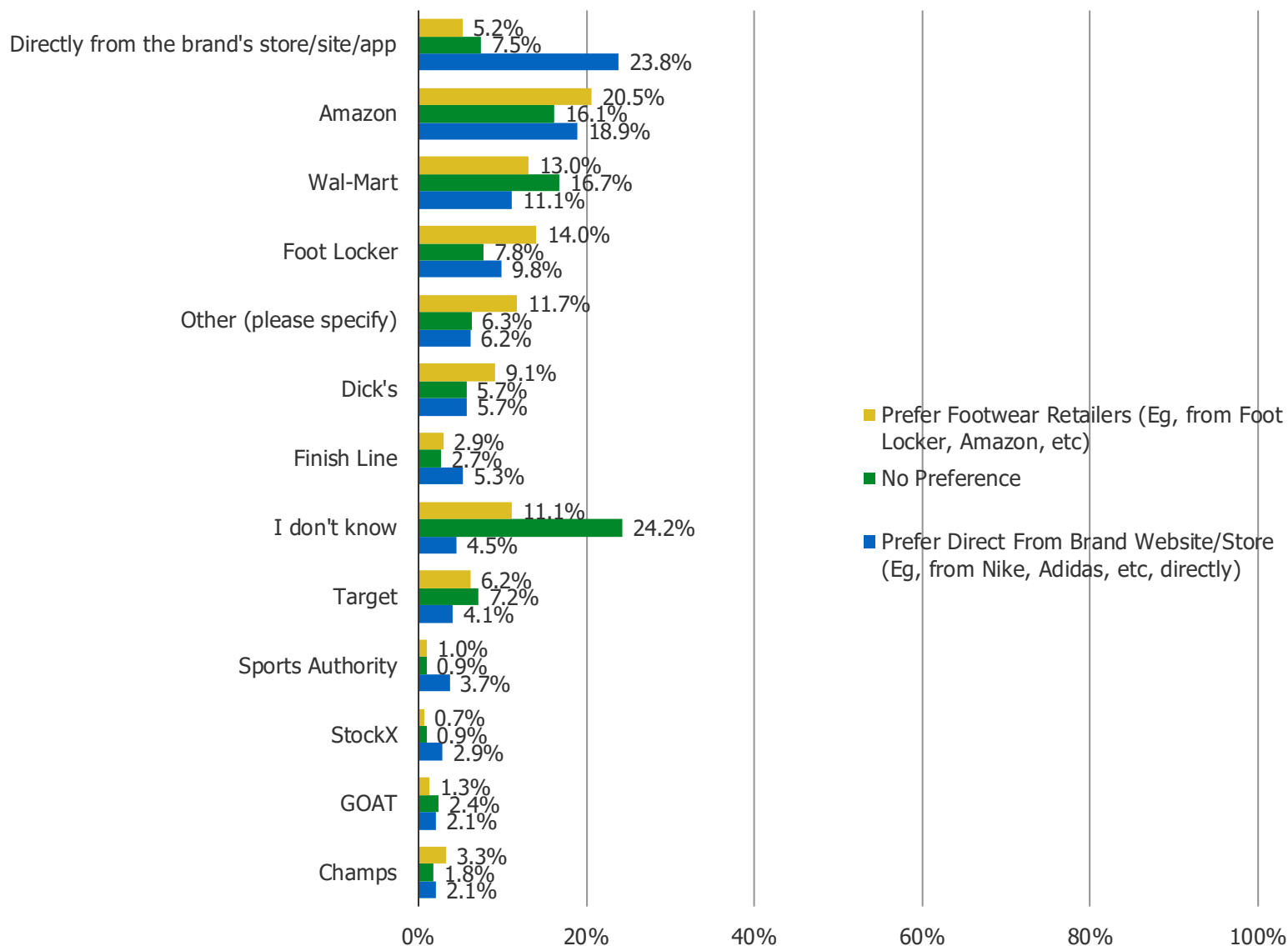
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

Posed to all respondents – Cross-tabbed by if they prefer buying online or in-stores.



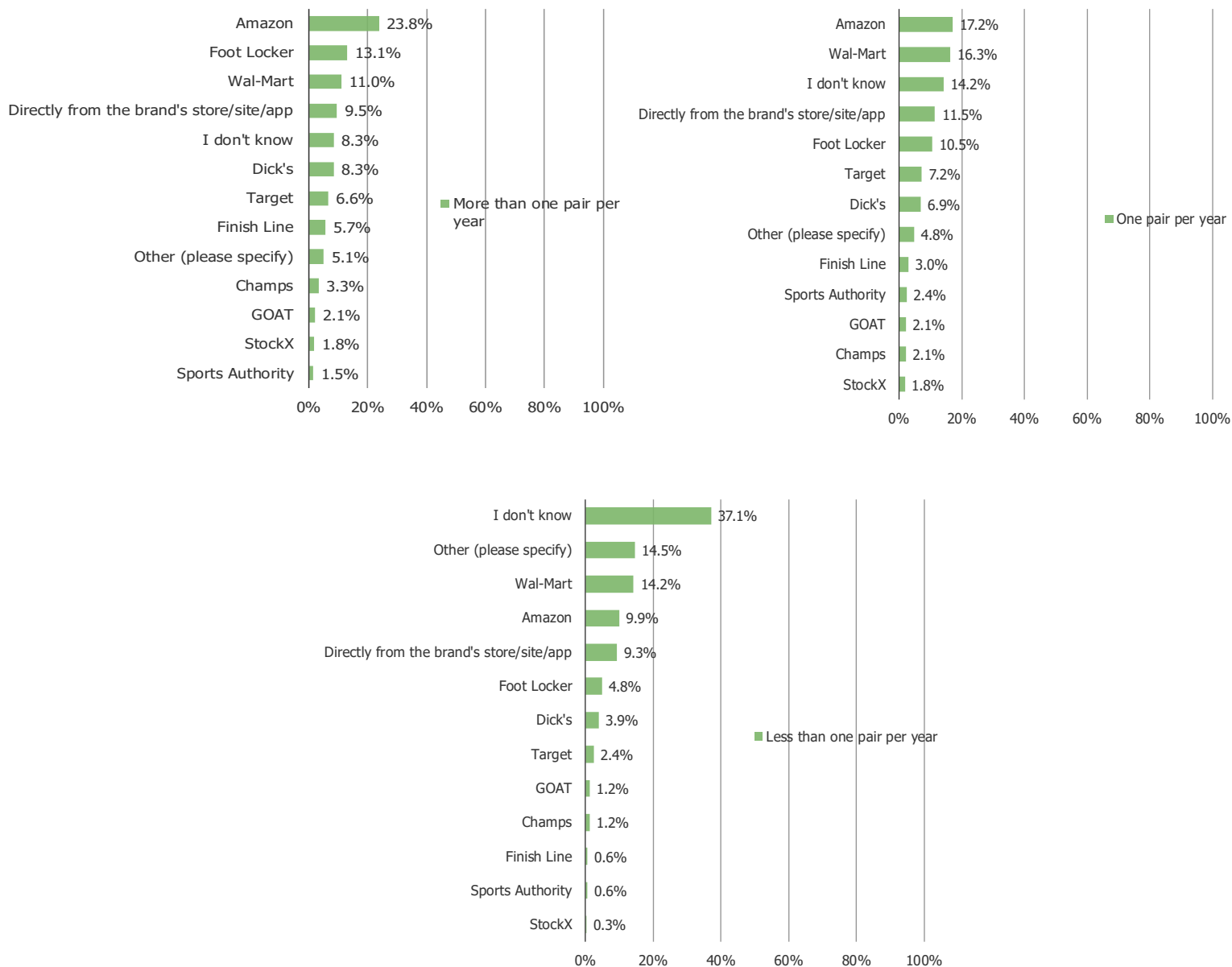
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

Posed to all respondents – Cross-tabbed by if they prefer buying online or in-stores.



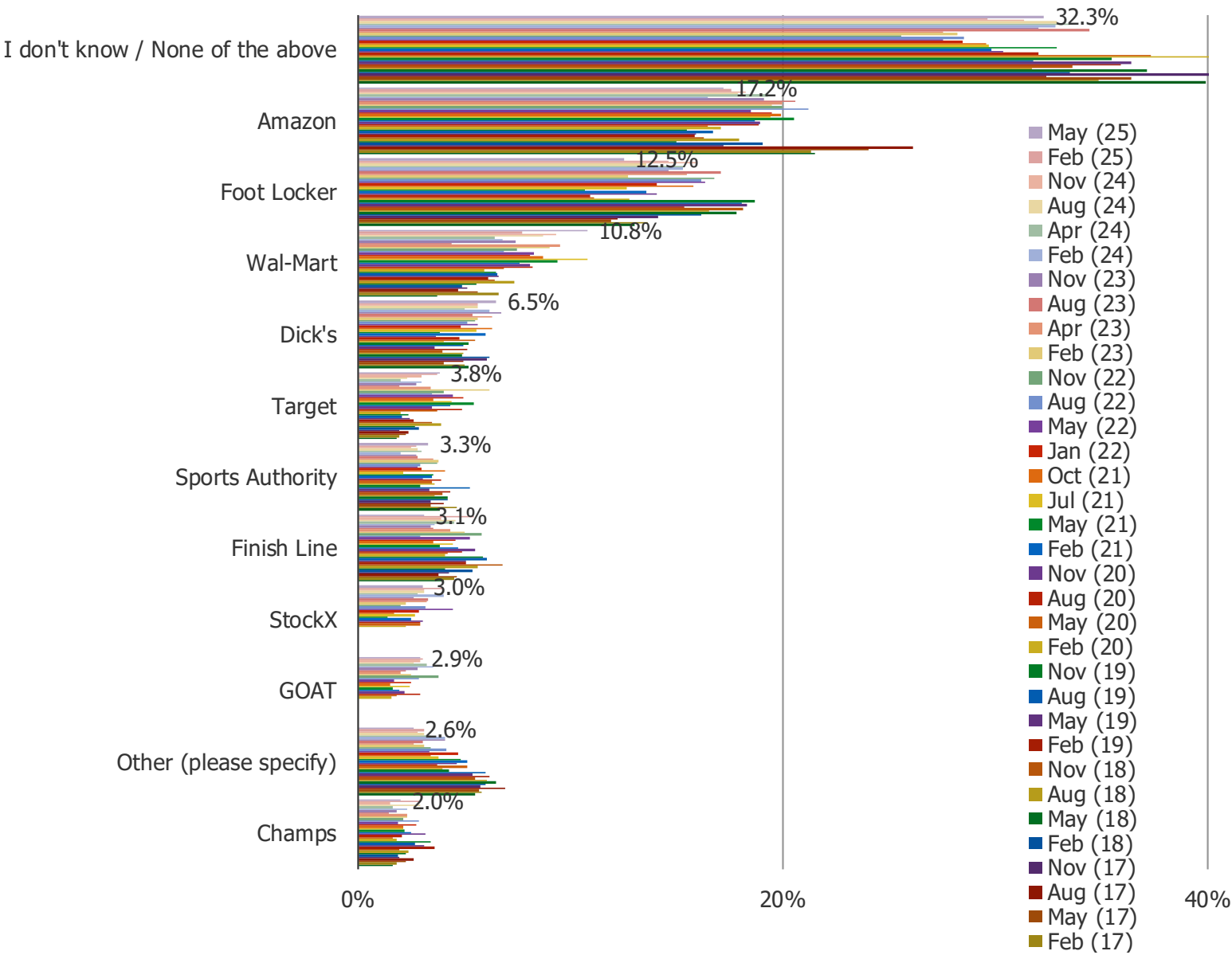
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

Posed to all respondents – Cross-tabbed by how often they buy sneakers.



WHICH RETAILER HAS THE MOST SNEAKERS THAT YOU CAN'T FIND ELSEWHERE?

Posed to all respondents

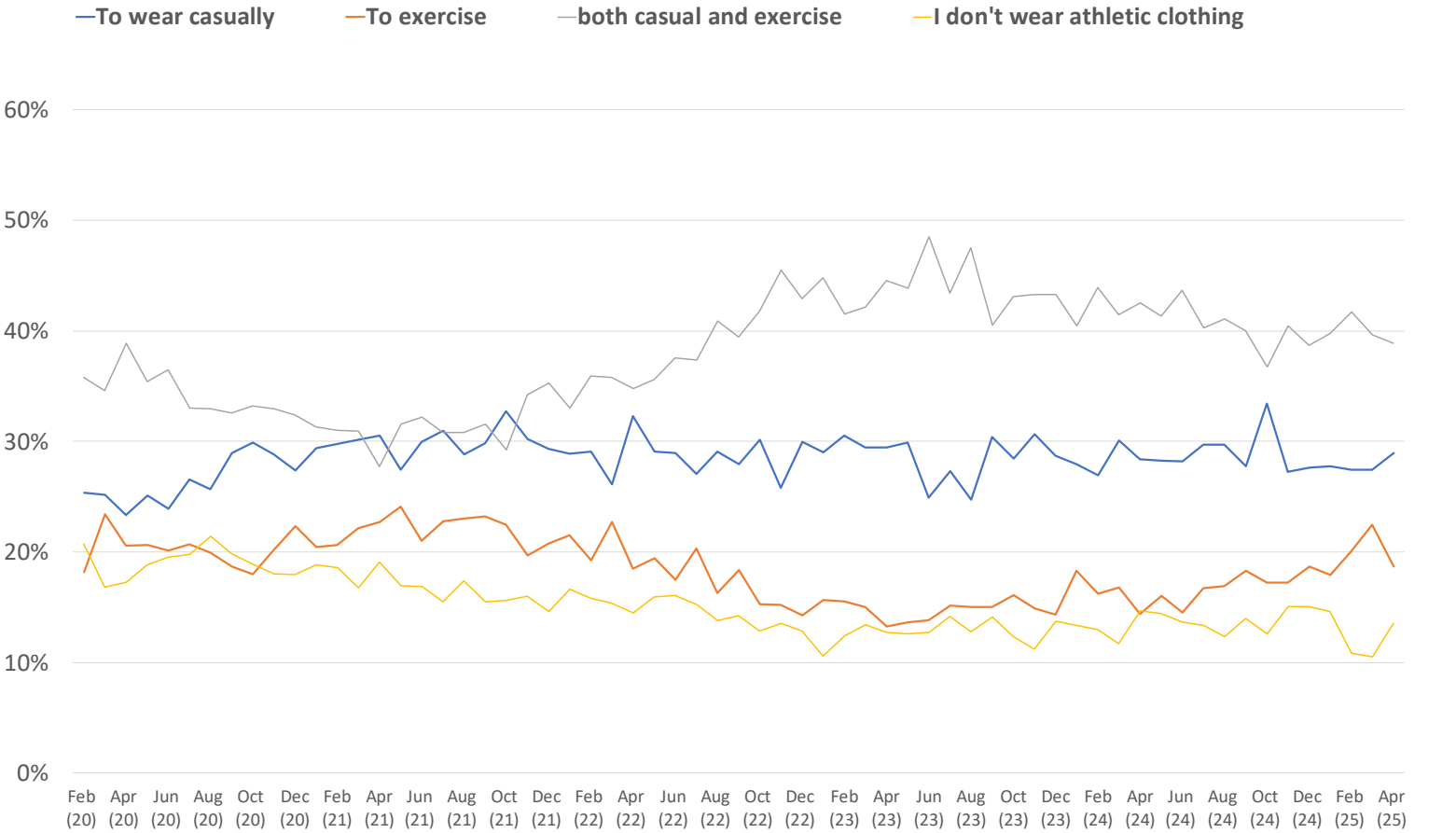




CASUAL WEAR

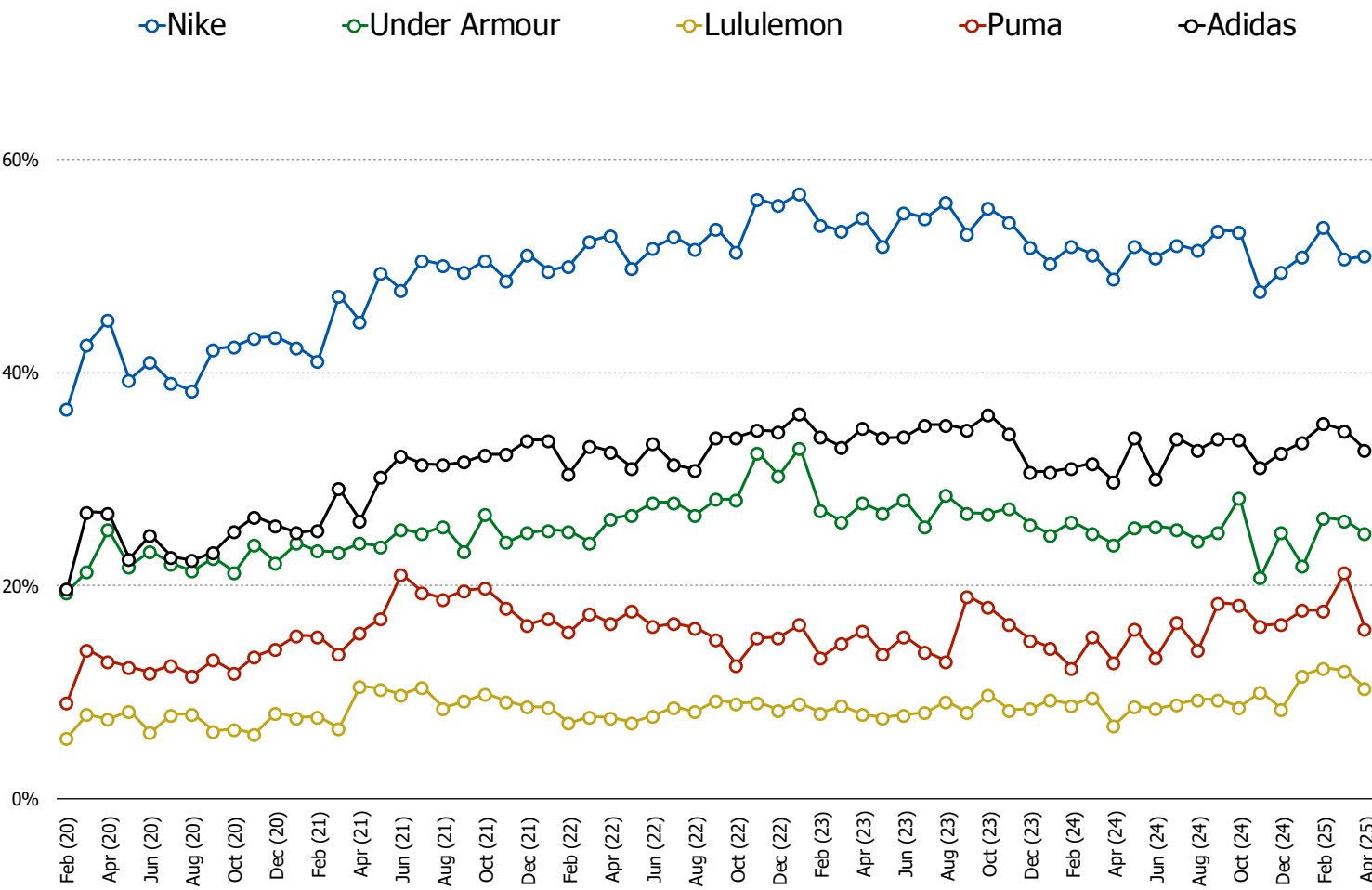
WHAT DO YOU USE ATHLETIC CLOTHING FOR?

Posed to all respondents



DO YOU REGULARLY OR OCCASIONALLY WEAR ATHLETIC CLOTHING FROM THE FOLLOWING BRANDS?

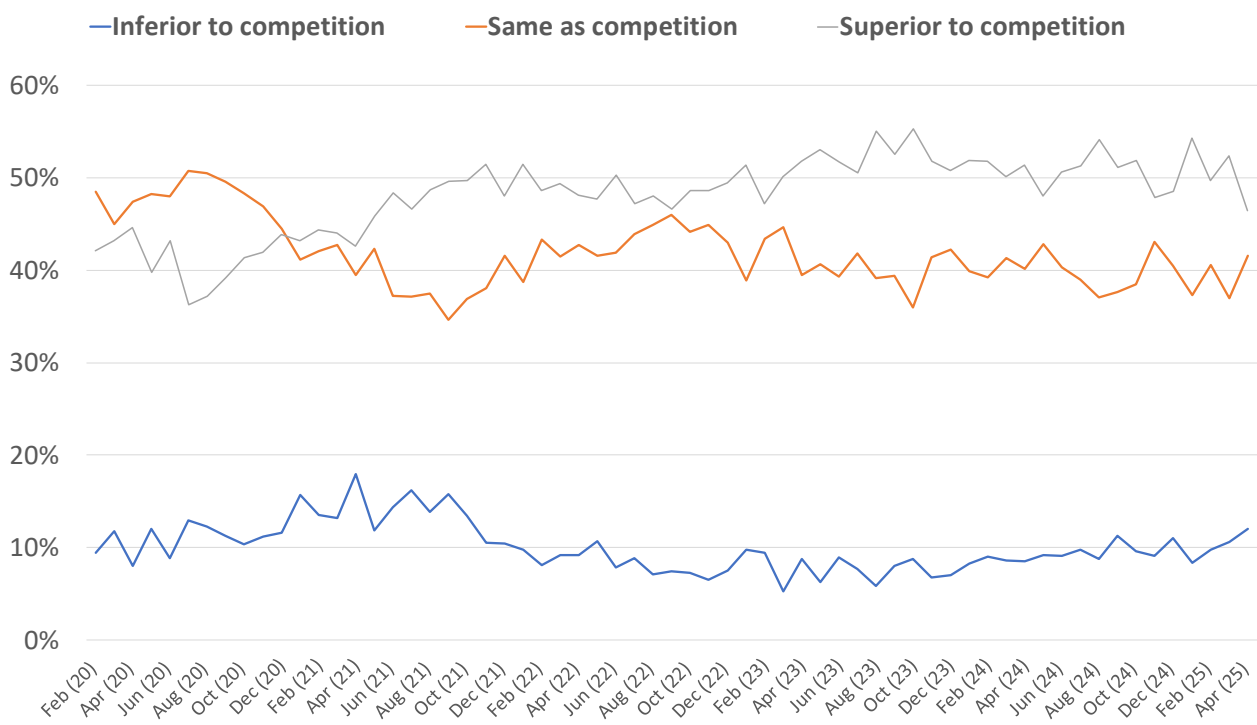
Posed to all respondents



IN YOUR OPINION, HOW DOES THIS BRAND’S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

Posed to respondents who regularly or occasionally wear athletic clothing from the following

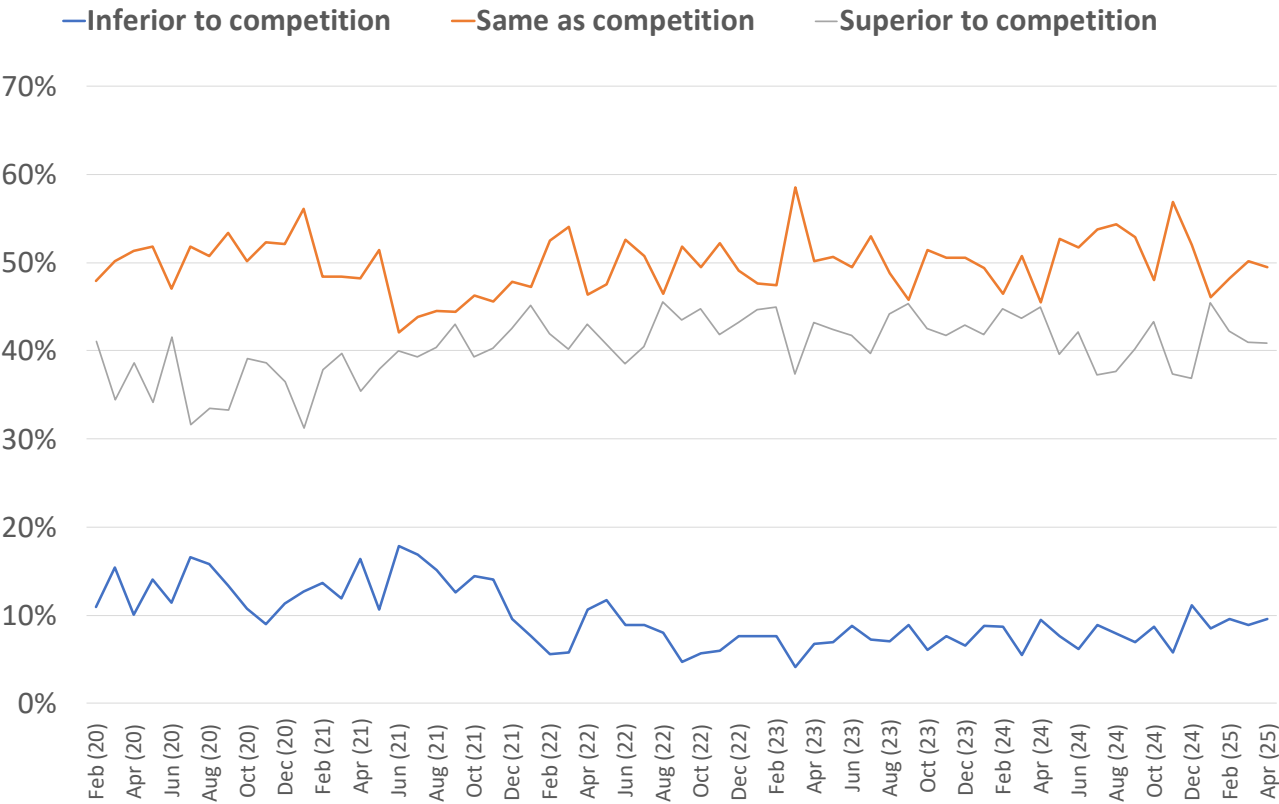
NIKE



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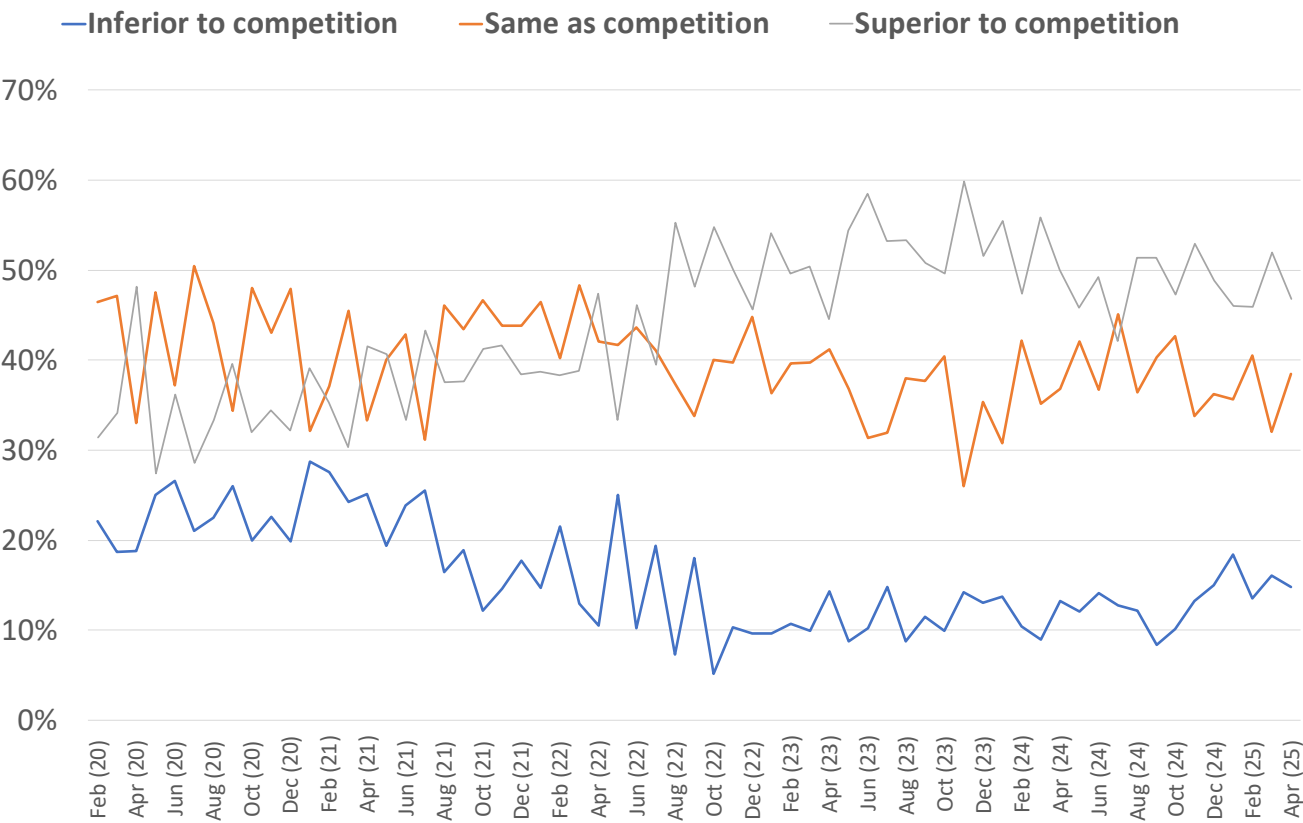
# UNDER ARMOUR



IN YOUR OPINION, HOW DOES THIS BRAND’S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

Posed to respondents who regularly or occasionally wear athletic clothing from the following

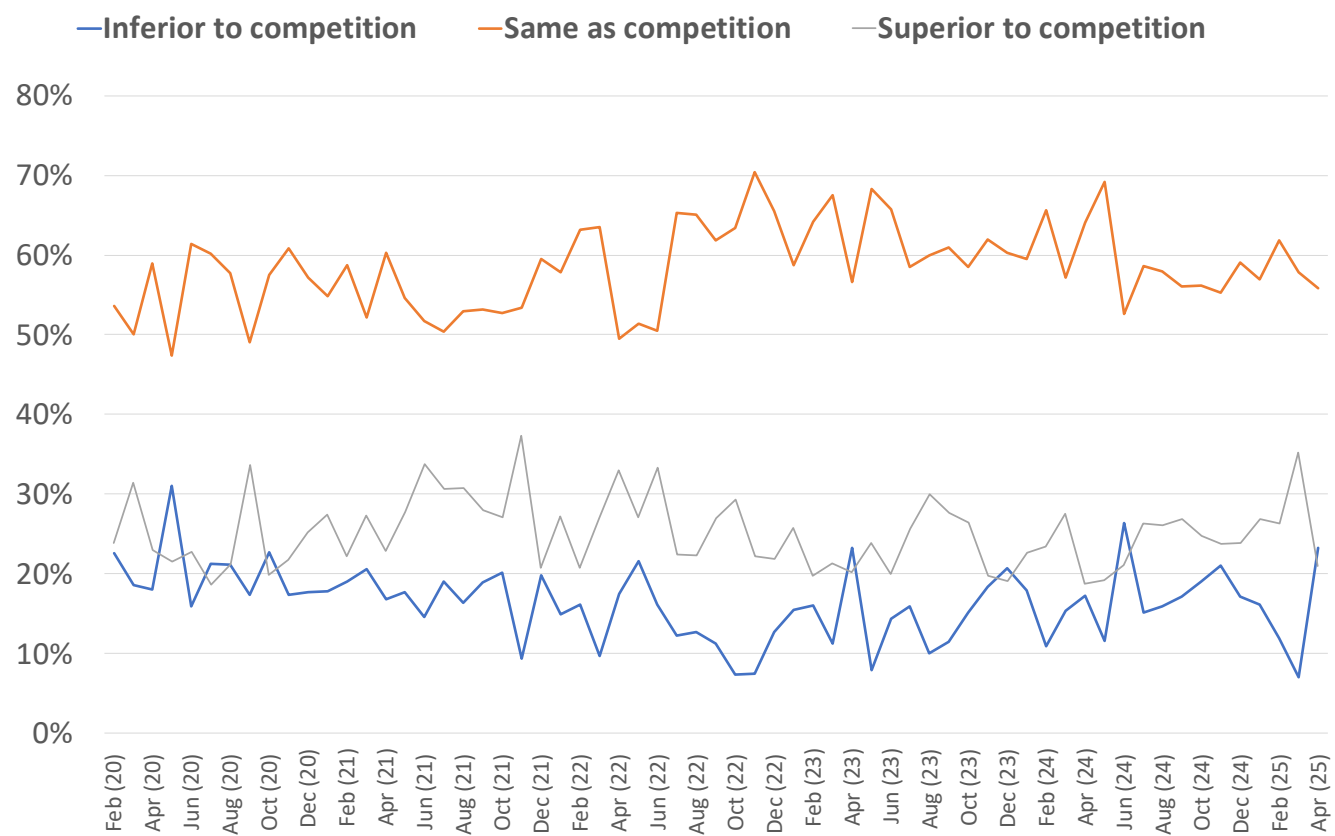
LULULEMON



IN YOUR OPINION, HOW DOES THIS BRAND’S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

Posed to respondents who regularly or occasionally wear athletic clothing from the following

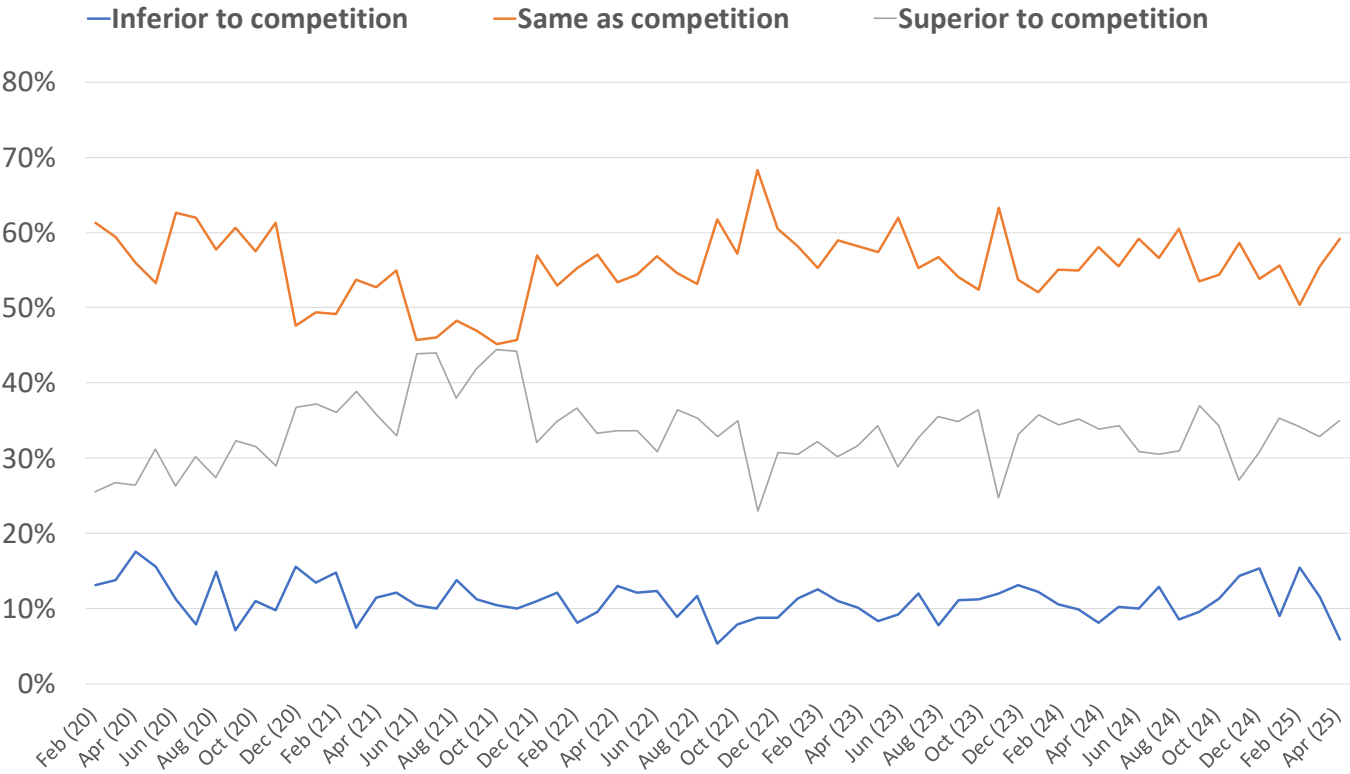
FILA



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PUMA

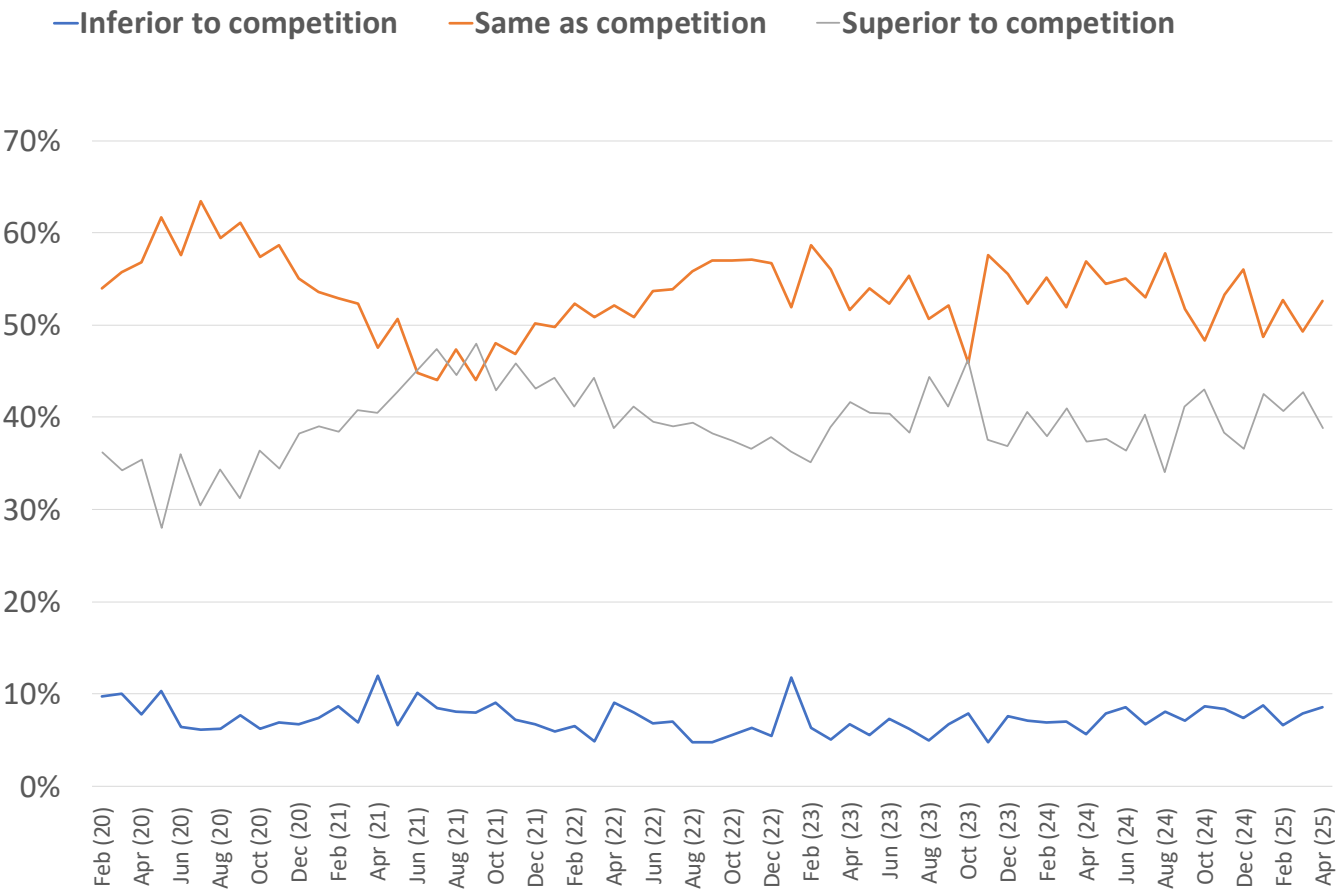




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Posed to respondents who regularly or occasionally wear athletic clothing from the following

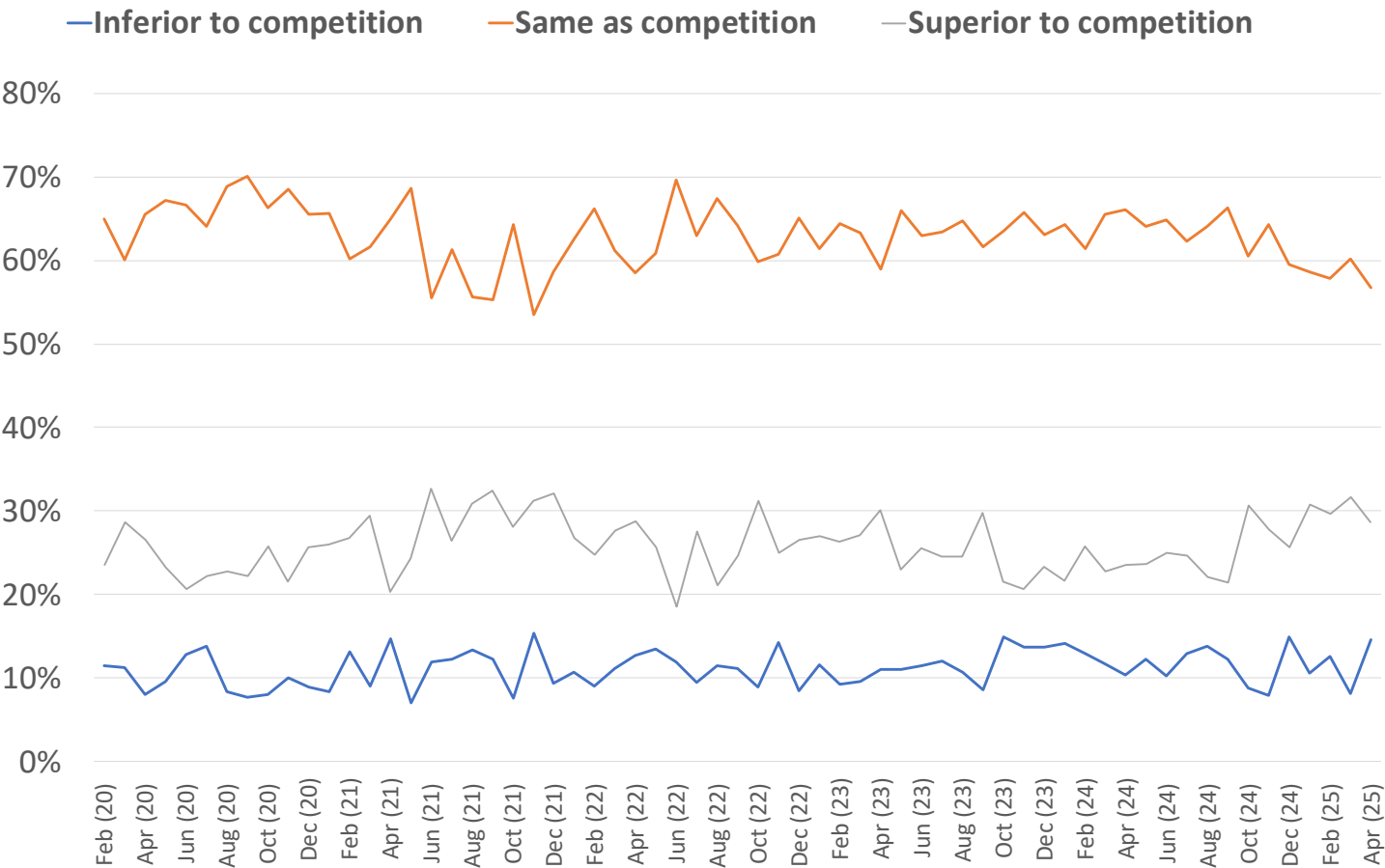
ADIDAS



IN YOUR OPINION, HOW DOES THIS BRAND’S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

Posed to respondents who regularly or occasionally wear athletic clothing from the following

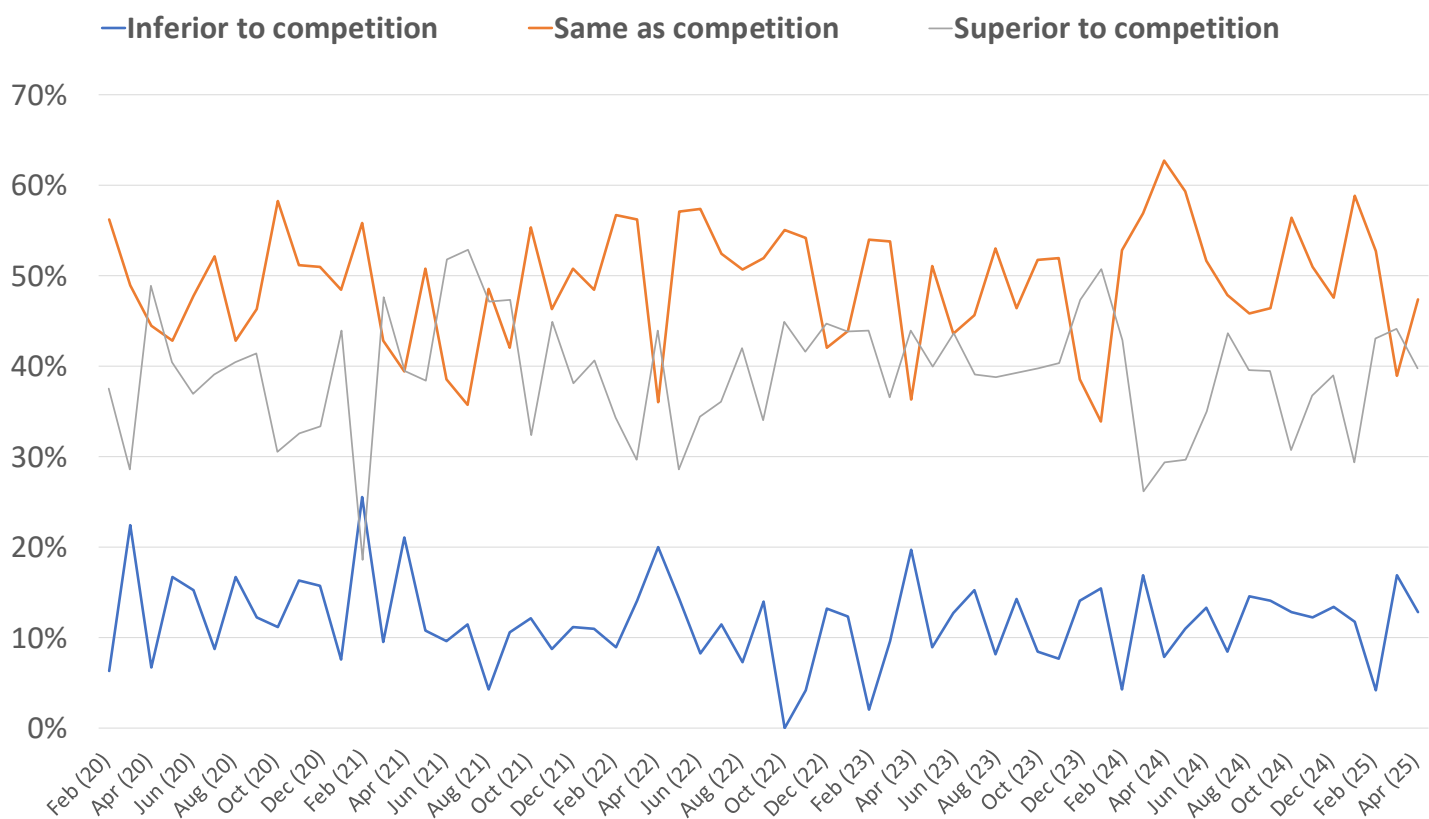
# CHAMPION



IN YOUR OPINION, HOW DOES THIS BRAND’S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

Posed to respondents who regularly or occasionally wear athletic clothing from the following

ATHLETA



IN YOUR OPINION, HOW DOES THIS BRAND’S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

Posed to respondents who regularly or occasionally wear athletic clothing from the following

REEBOK

