

BESPOKE SURVEYS

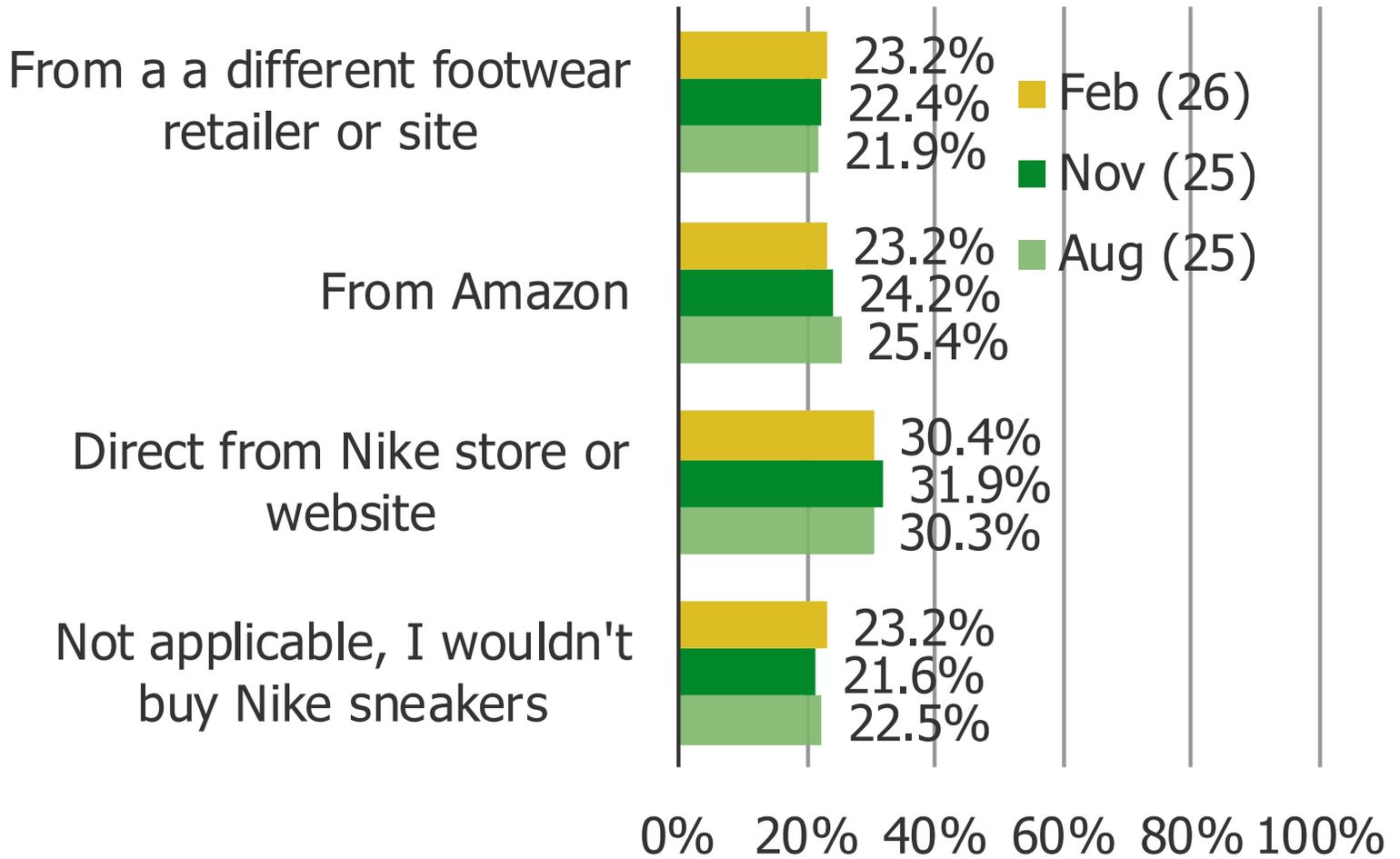
Footwear, Vol 39

1,000+ Respondents Per Quarter

NEW QUESTIONS

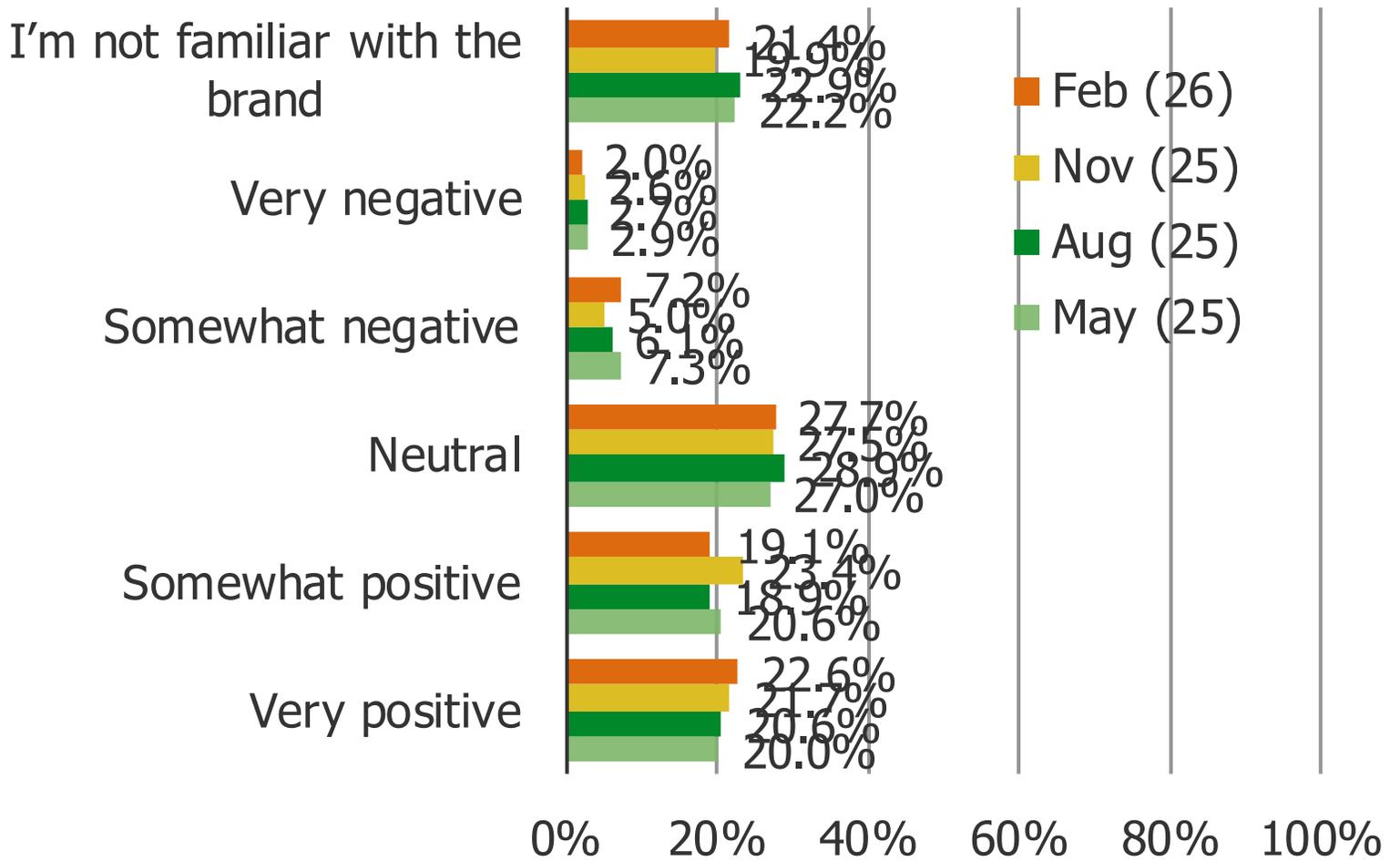
IF YOU WERE BUYING A PAIR OF NIKE SNEAKERS TODAY, WHERE WOULD YOU PREFER TO GET THEM?

Posed to all respondents



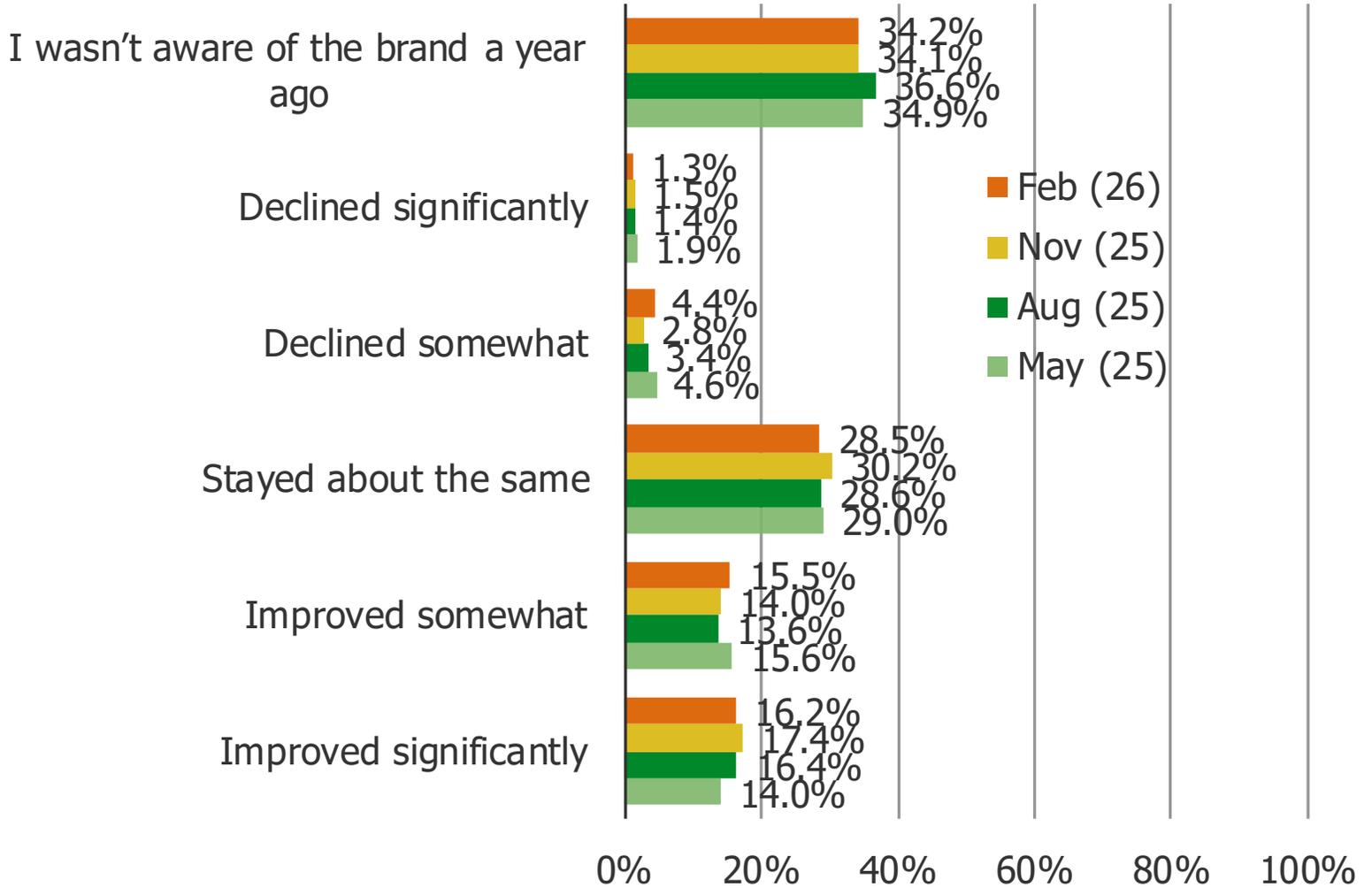
HOW WOULD YOU DESCRIBE YOUR OVERALL PERCEPTION OF THE ON (ON CLOUD) BRAND TODAY?
 EXAMPLES OF THEIR SHOES PICTURED IN THE SURVEY

Posed to all respondents



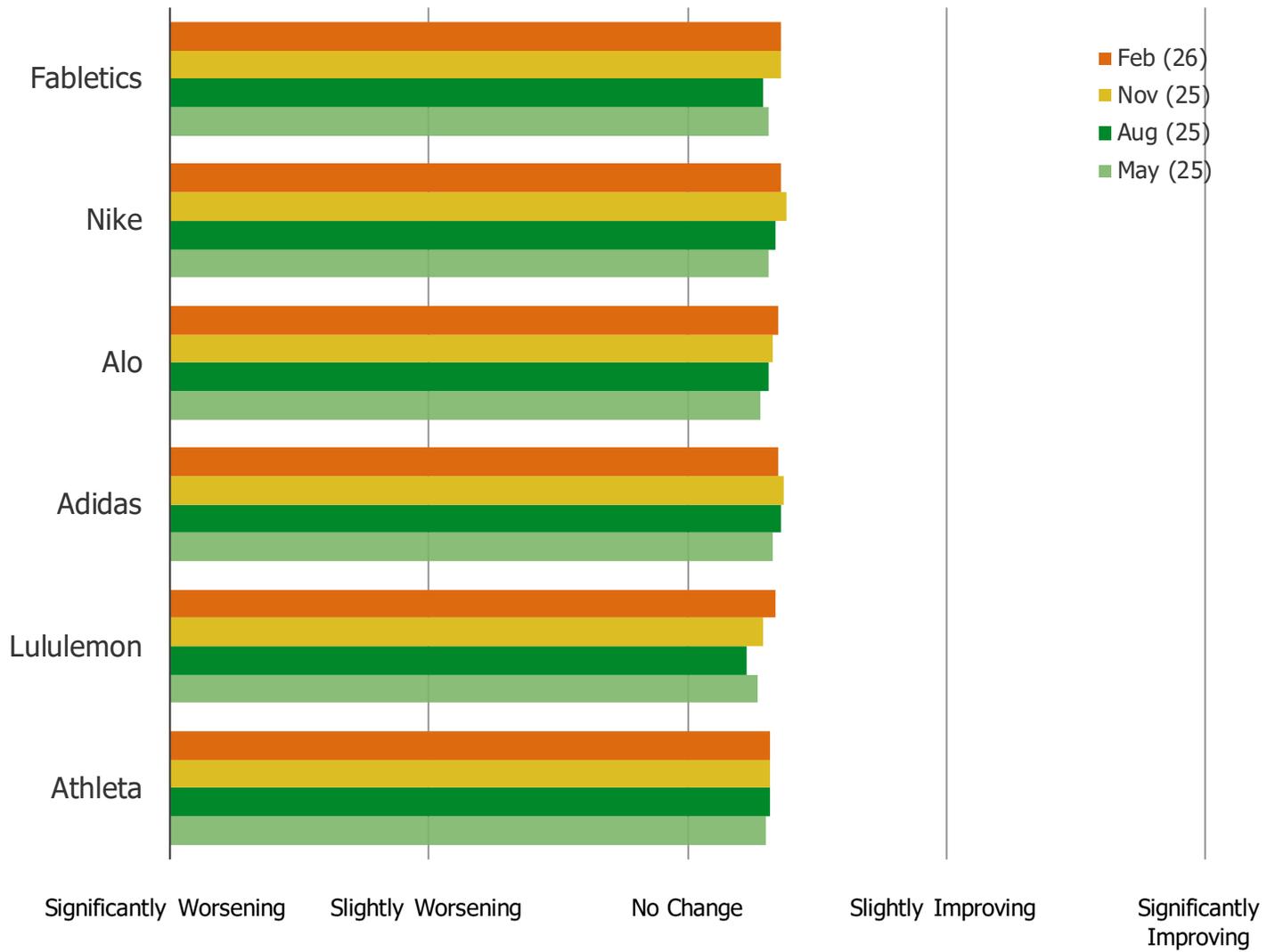
HOW HAS YOUR PERCEPTION OF ON (ON CLOUD) CHANGED OVER THE PAST 12 MONTHS?

Posed to all respondents



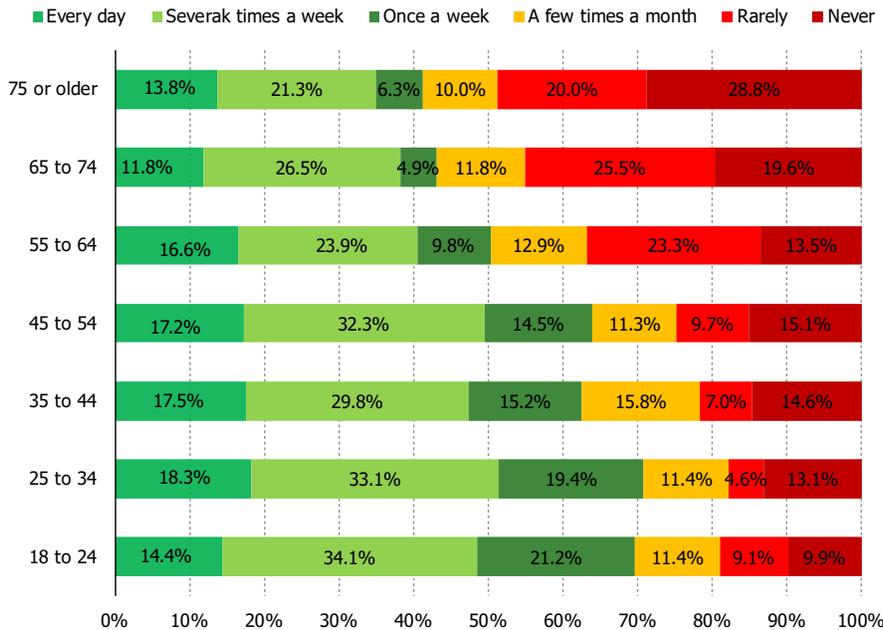
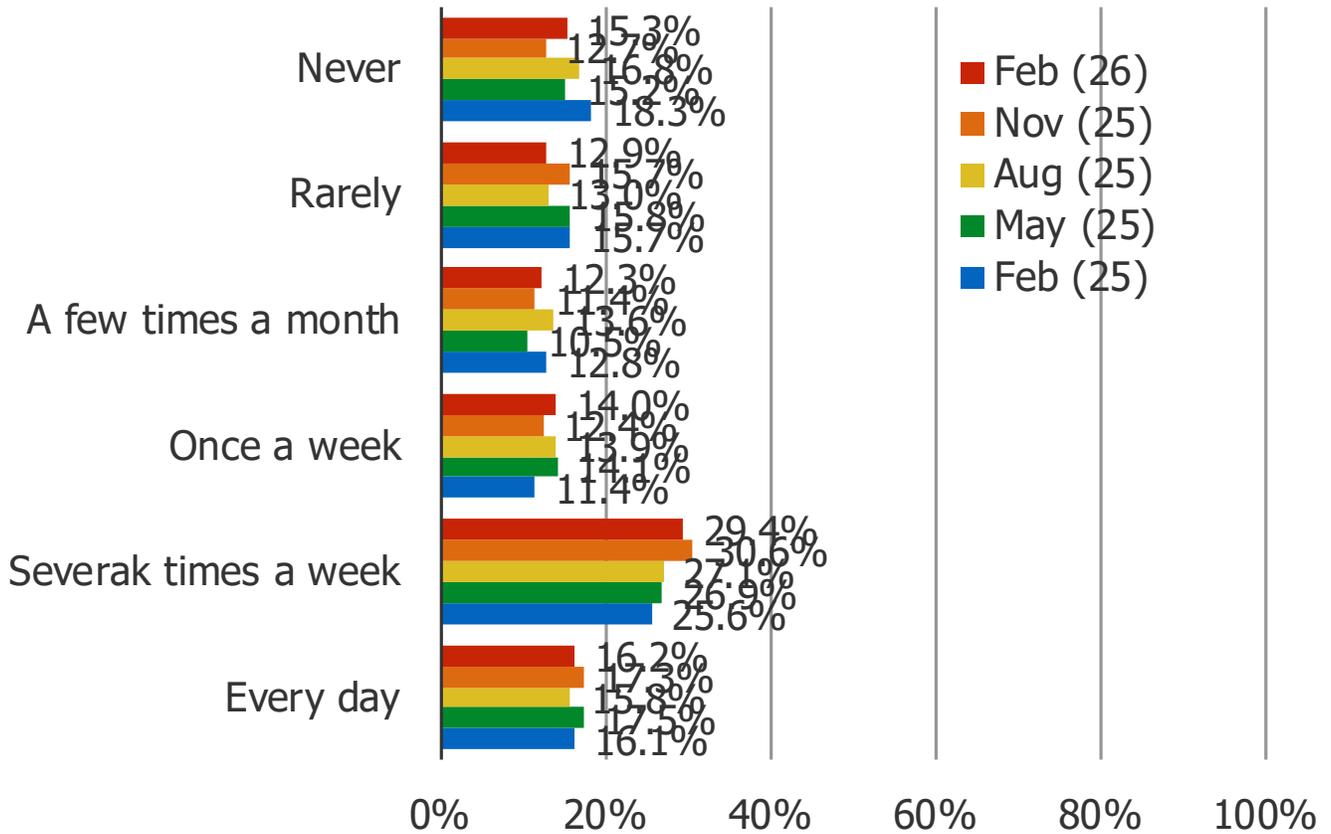
HAS YOUR OPINION OF THE FOLLOWING BRANDS BEEN CHANGING RECENTLY?

Posed to all respondents



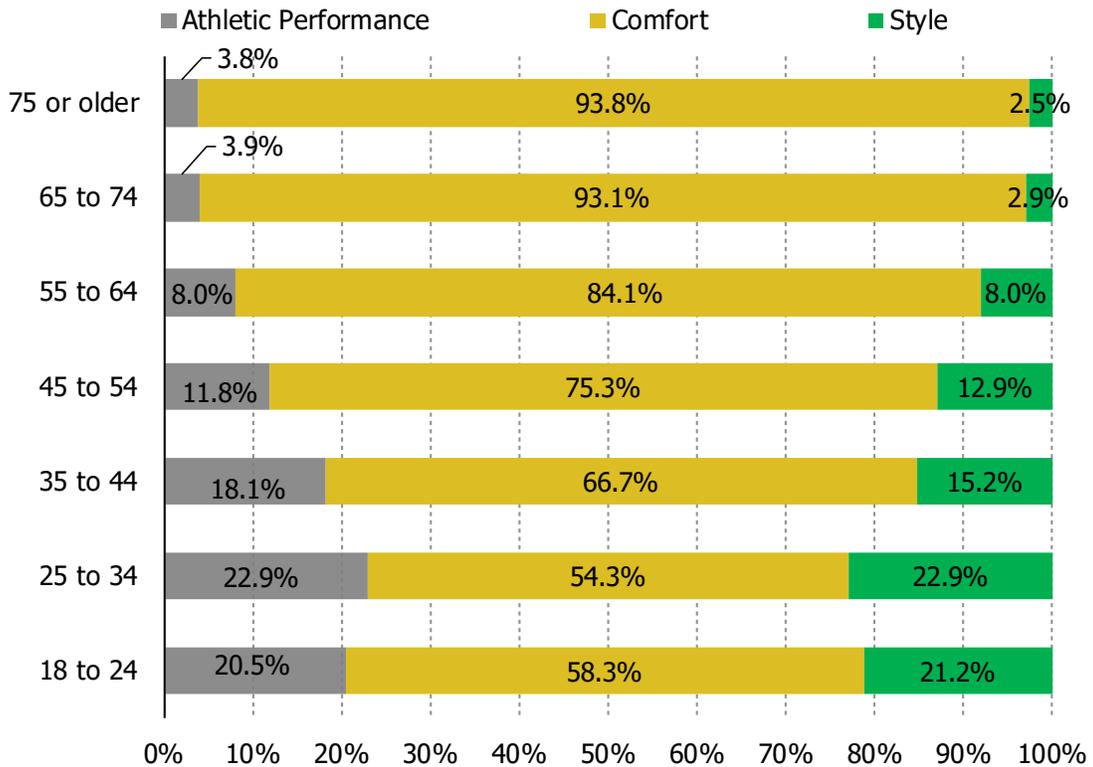
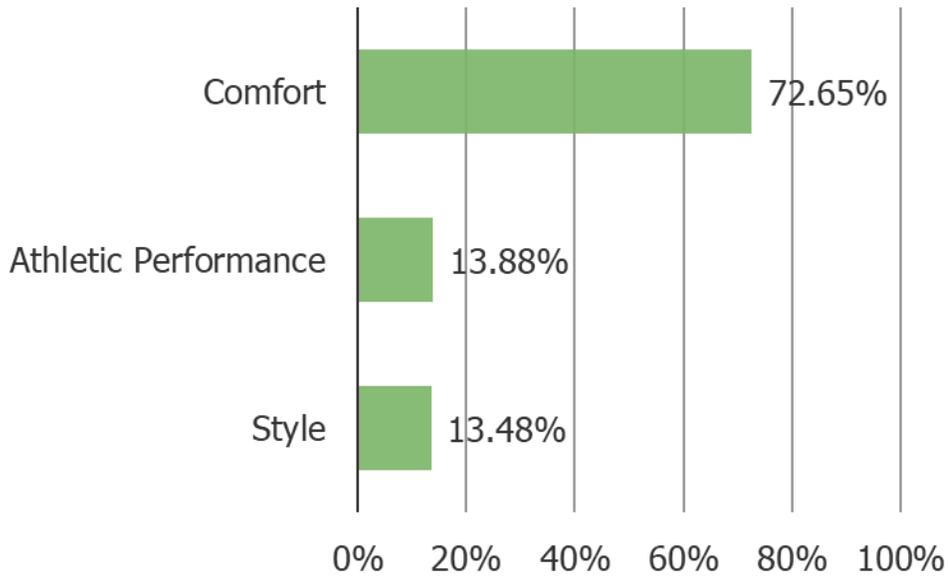
HOW OFTEN DO YOU WEAR ATHLEISURE / ATHLETIC CLOTHING?

Posed to all respondents



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

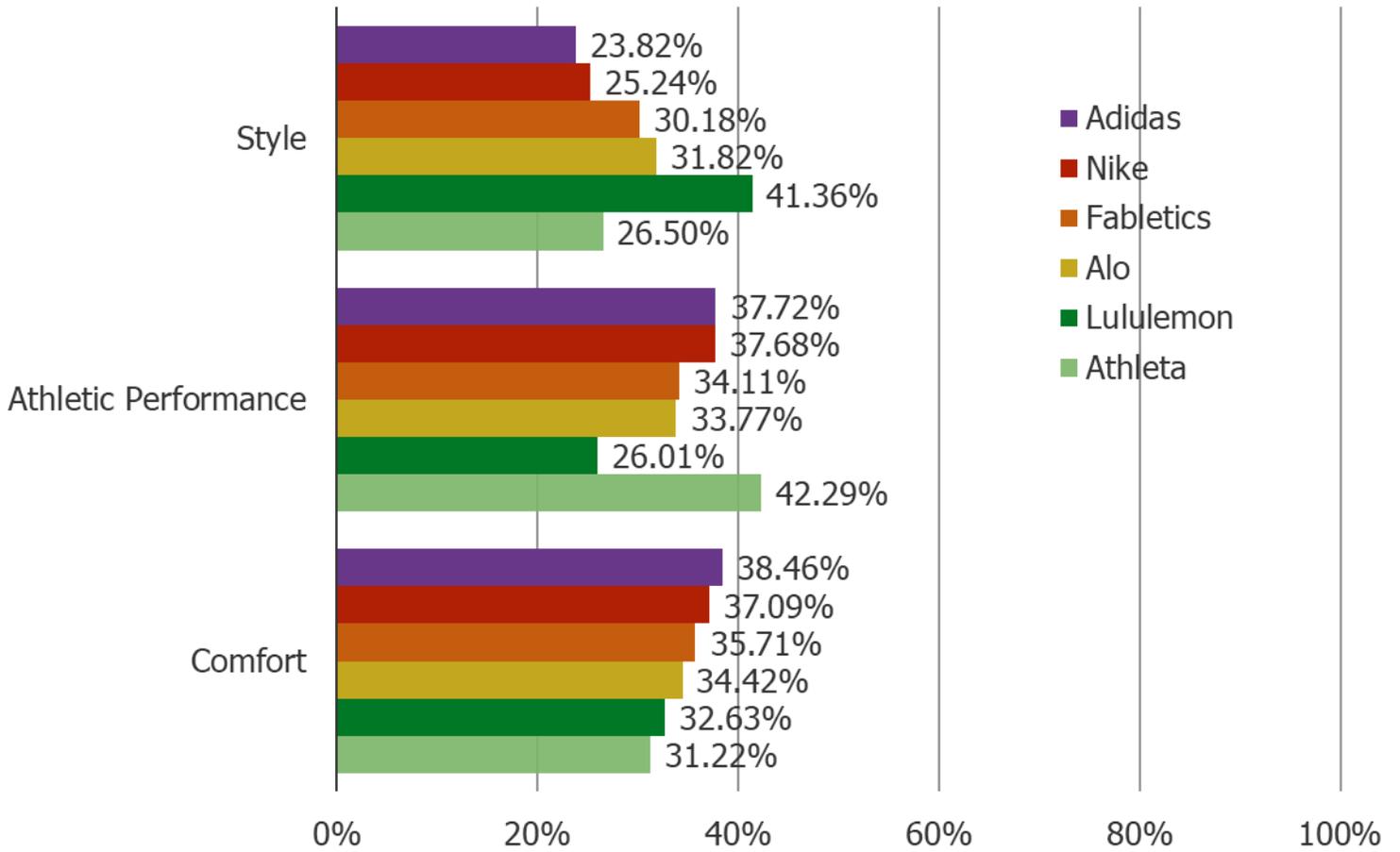
Posed to all respondents



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

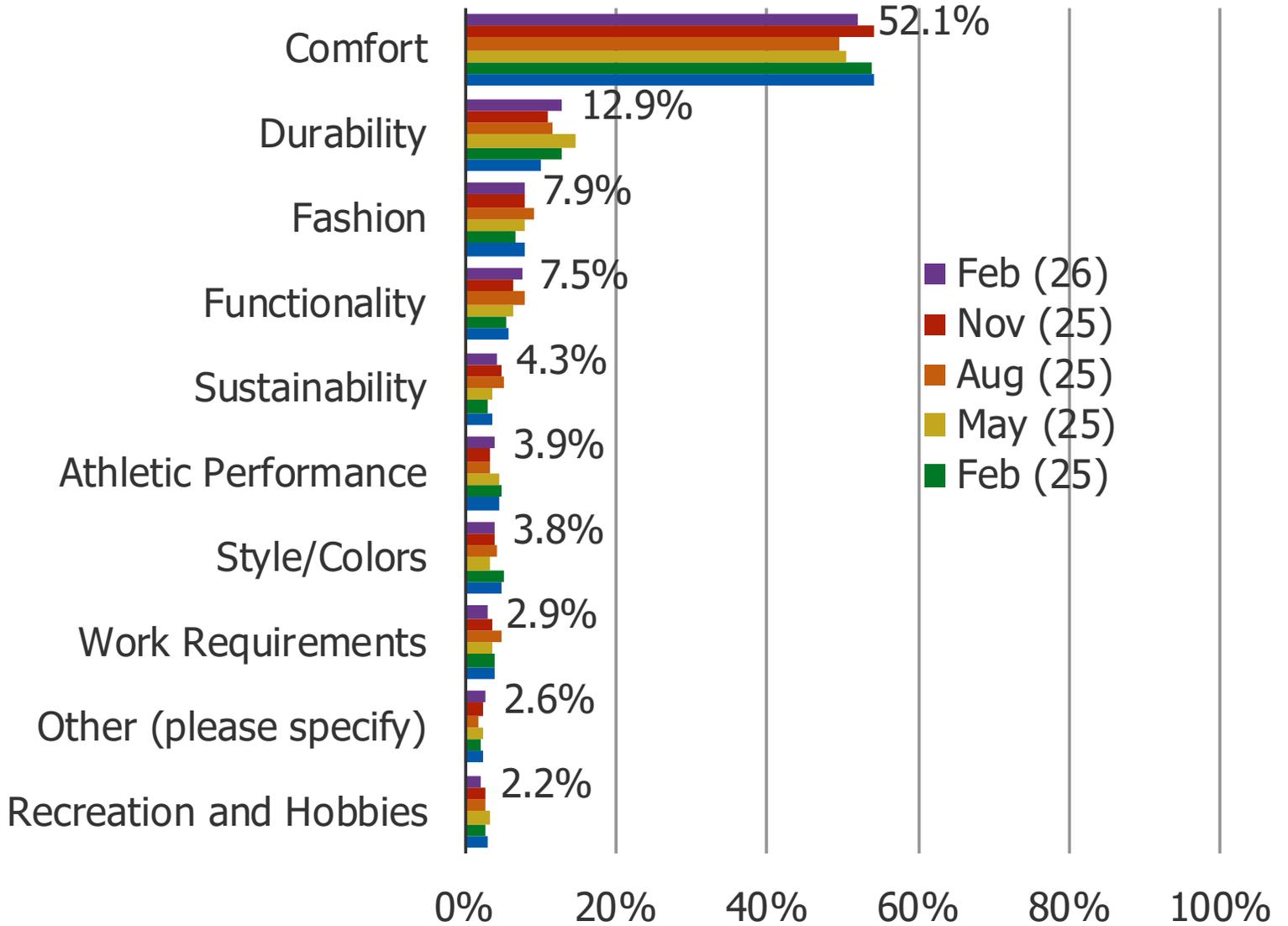
Posed to all respondents (excluding those who selected NA for each brand)

February 2026



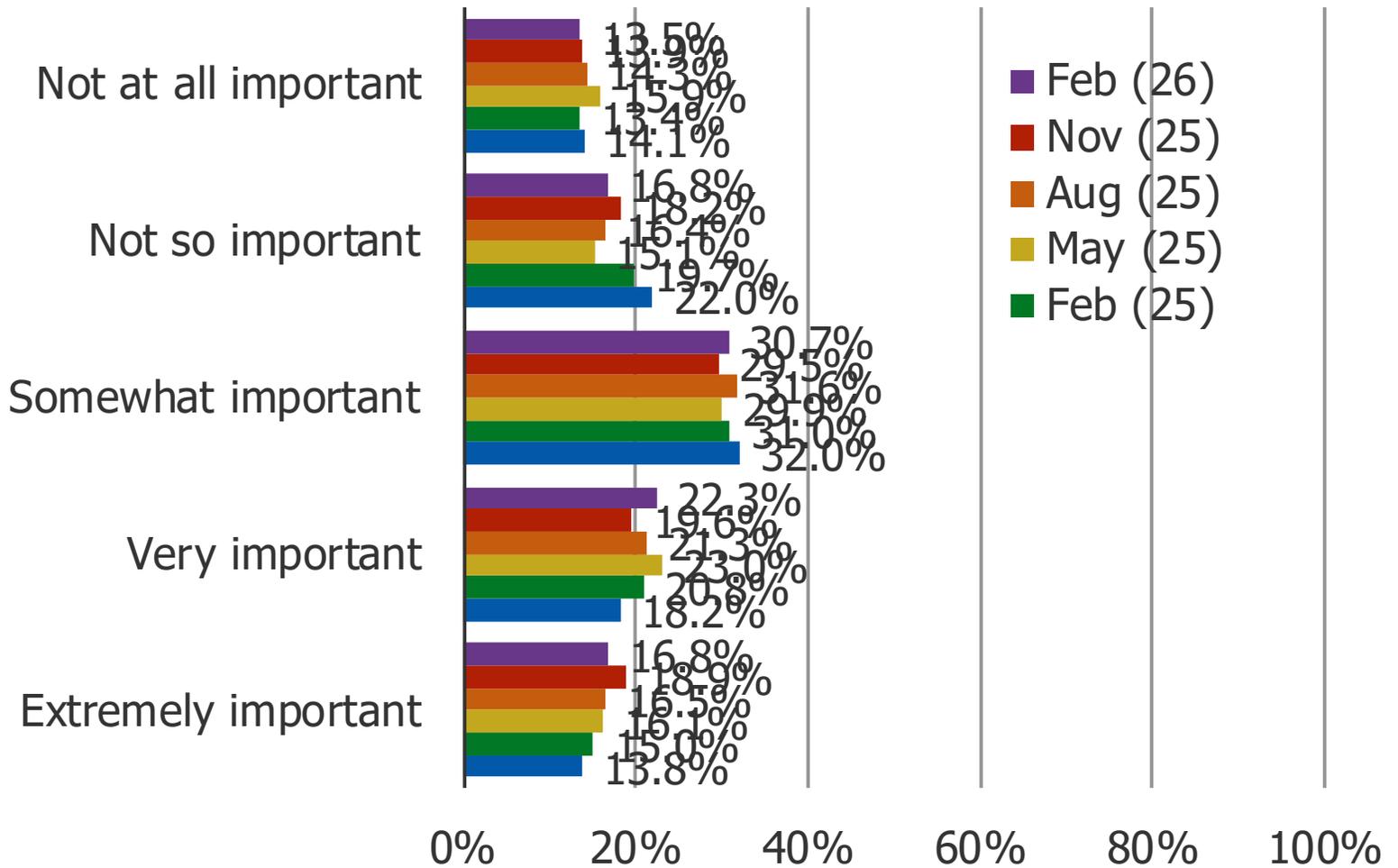
WHAT IS TYPICALLY THE PRIMARY DRIVER FOR FOOTWEAR PURCHASES THAT YOU MAKE?

Posed to all respondents



HOW IMPORTANT IS THE FASHION COMPONENT OF SNEAKERS TO YOU?

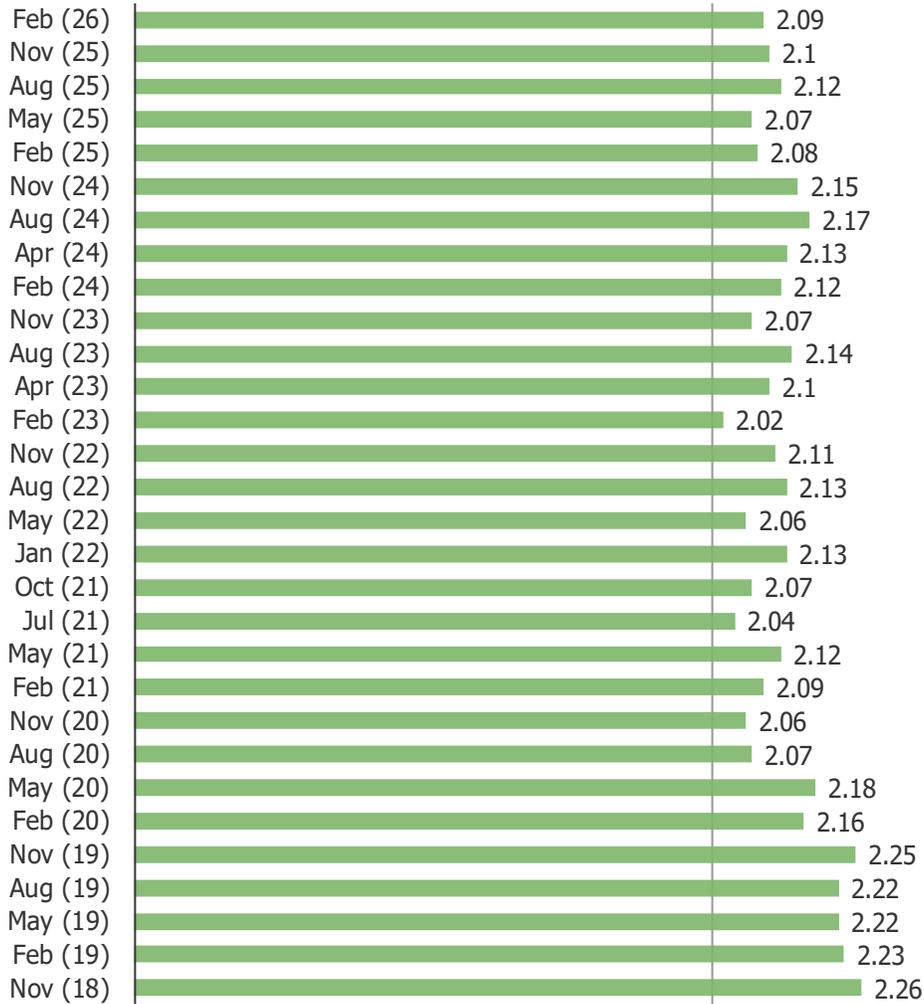
Posed to all respondents



FOOTWEAR PURCHASE PREFERENCES

WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

Posed to all respondents



Prefer Direct from Brand Website/Store

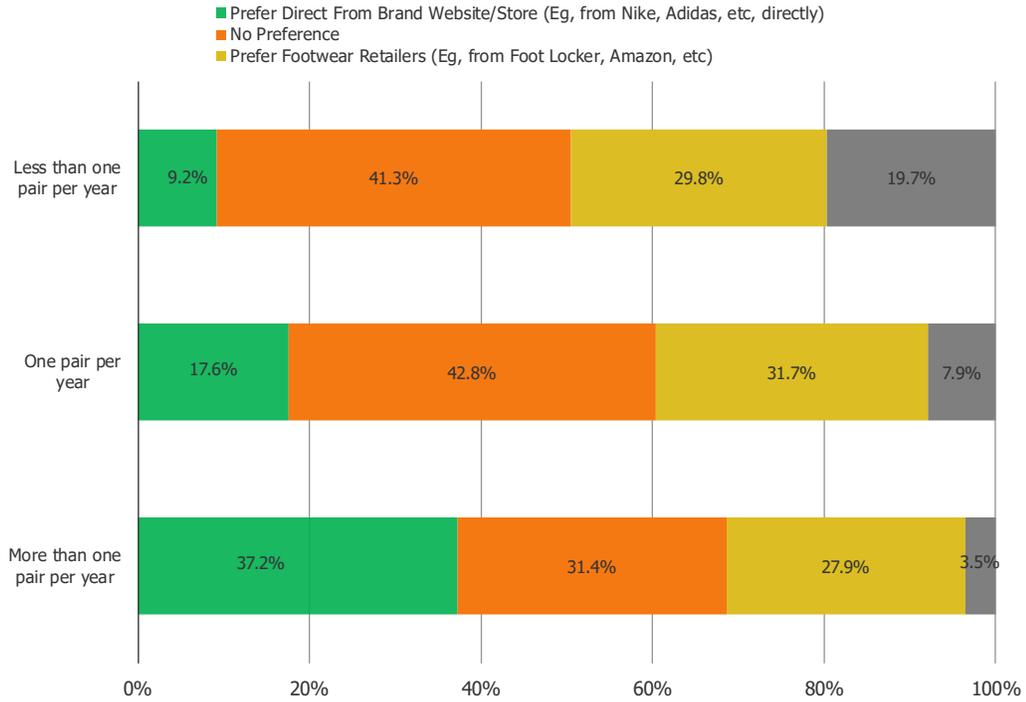
No Preference

Prefer Footwear Retailer

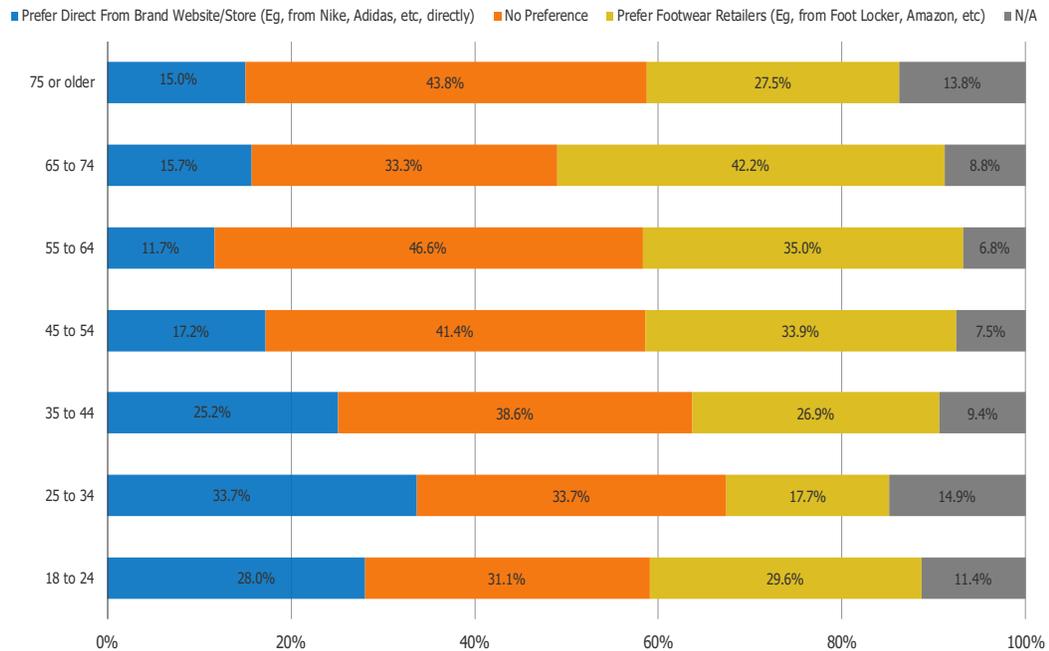
WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

Cross-Tab Analysis

By How Often Consumers Buy Footwear

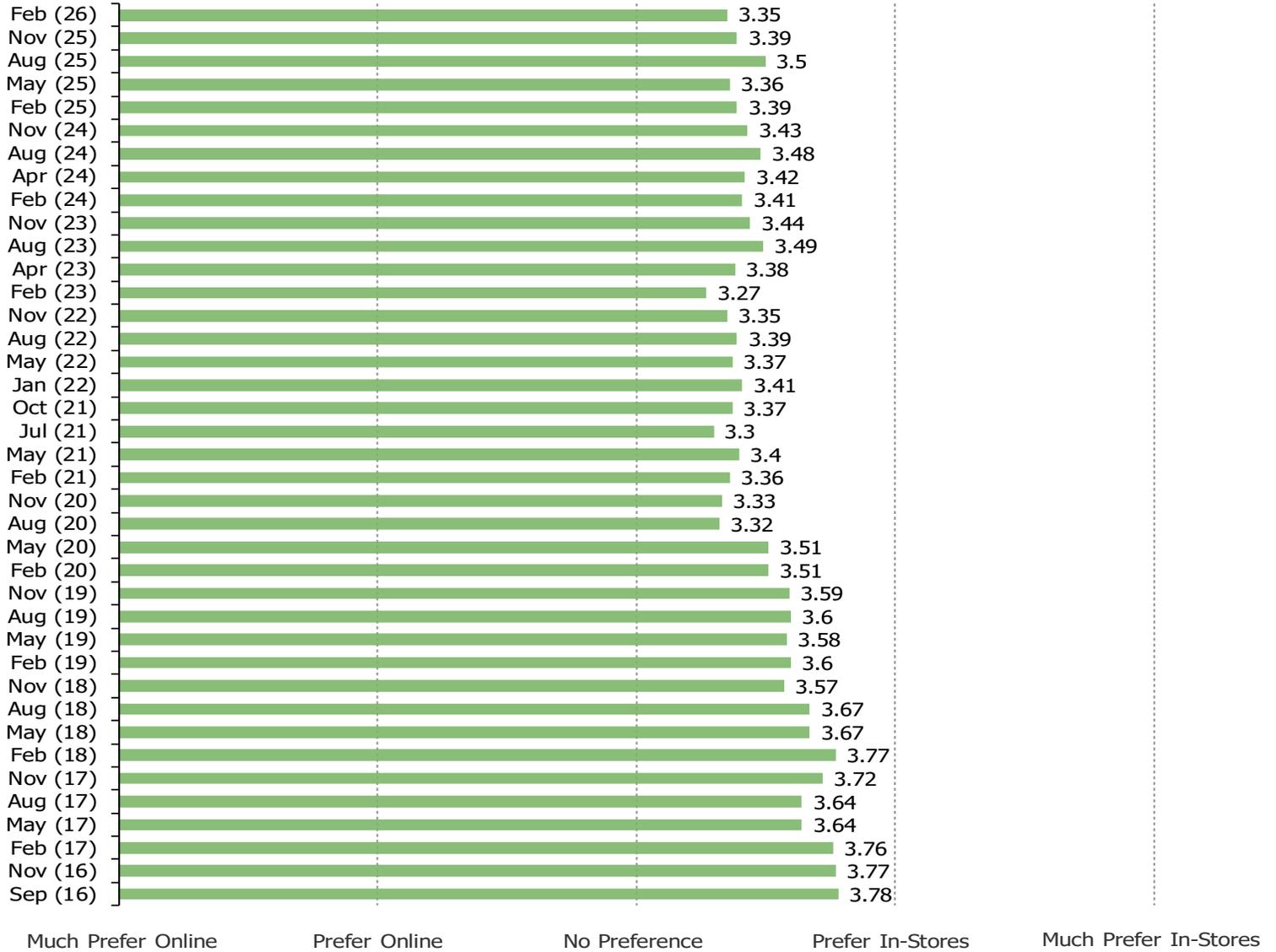


By Age



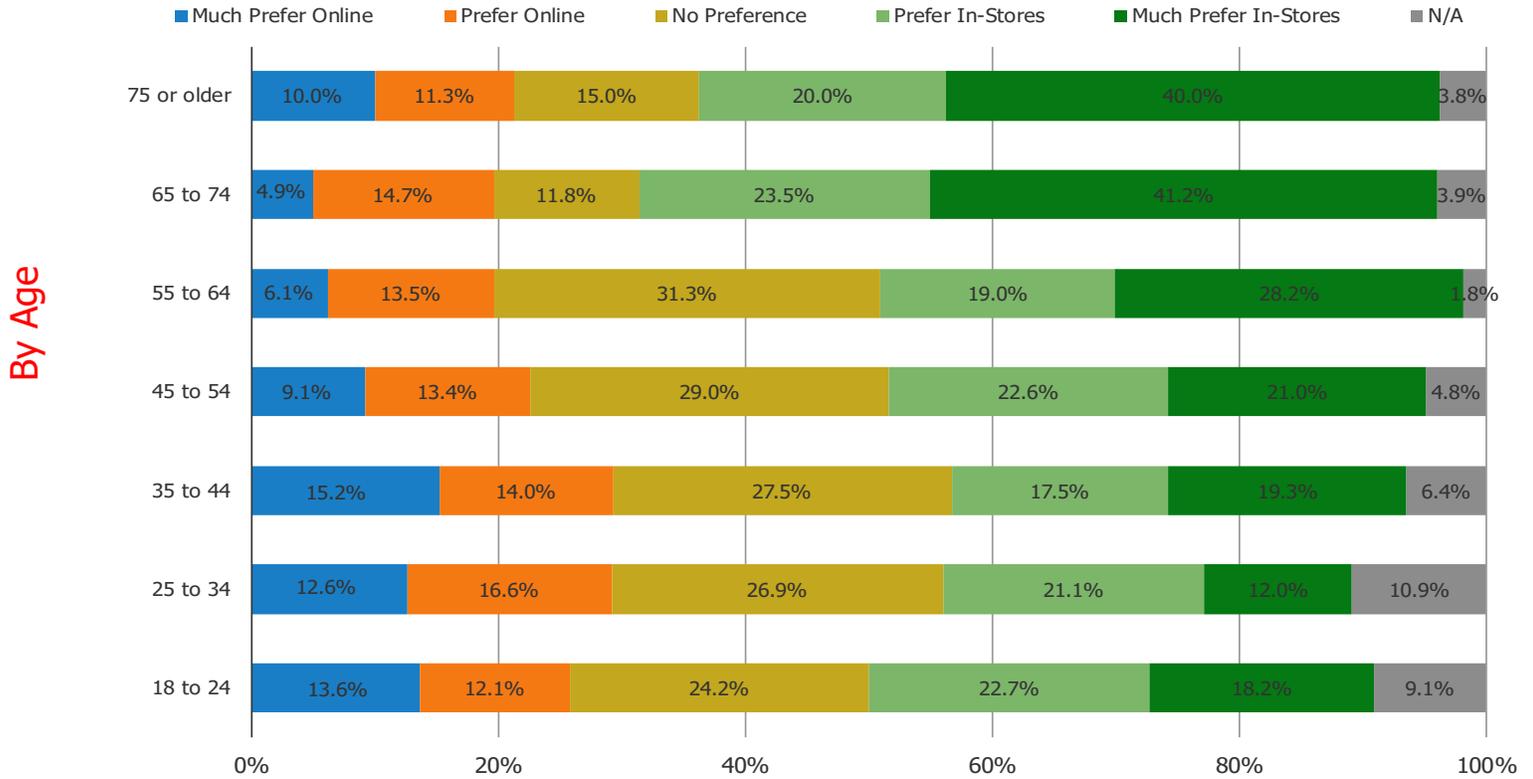
WHERE DO YOU PREFER TO BUY SNEAKERS?

Posed to all respondents



WHERE DO YOU PREFER TO BUY SNEAKERS?

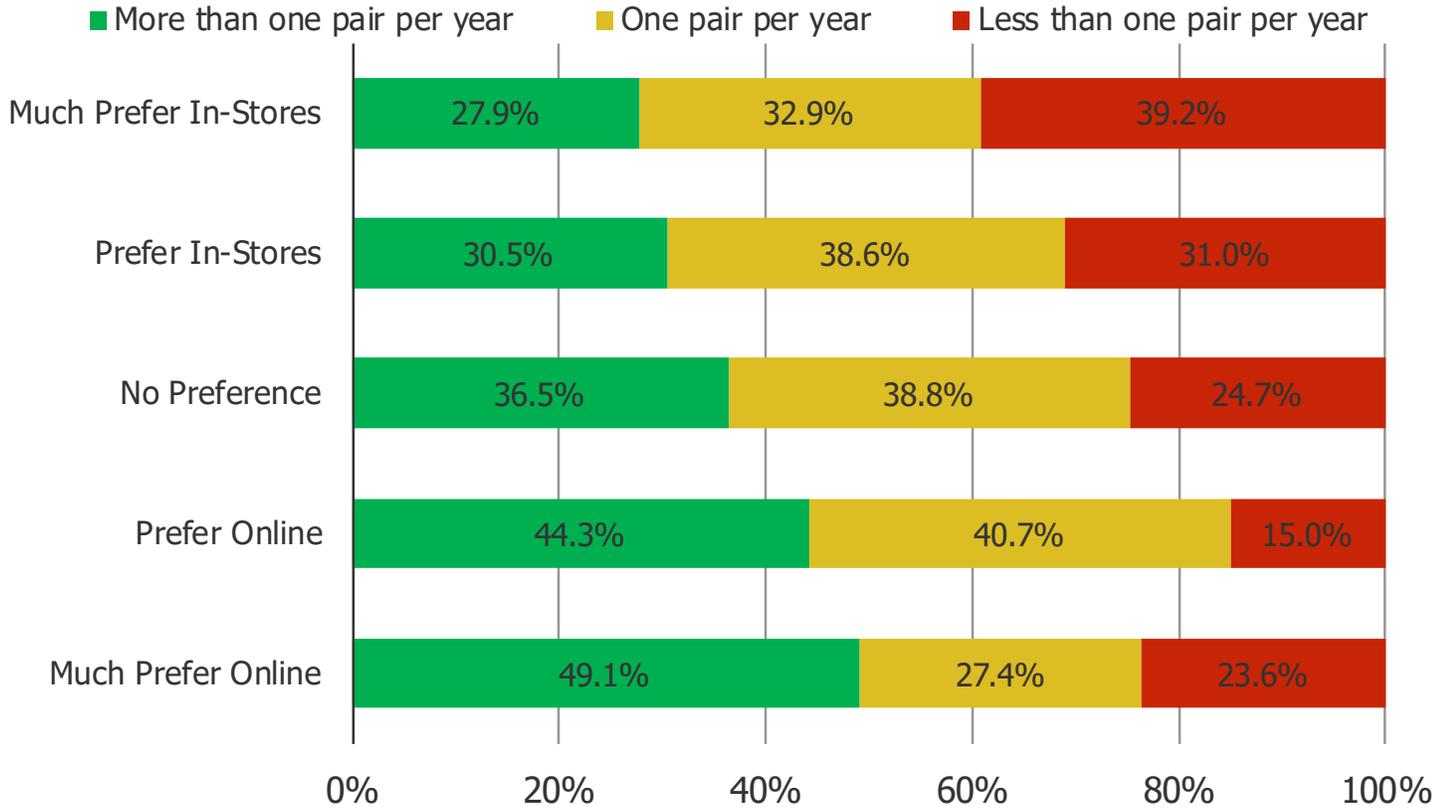
Cross-Tab Analysis



HOW MANY PAIRS OF FOOTWEAR DO YOU BUY PER YEAR?

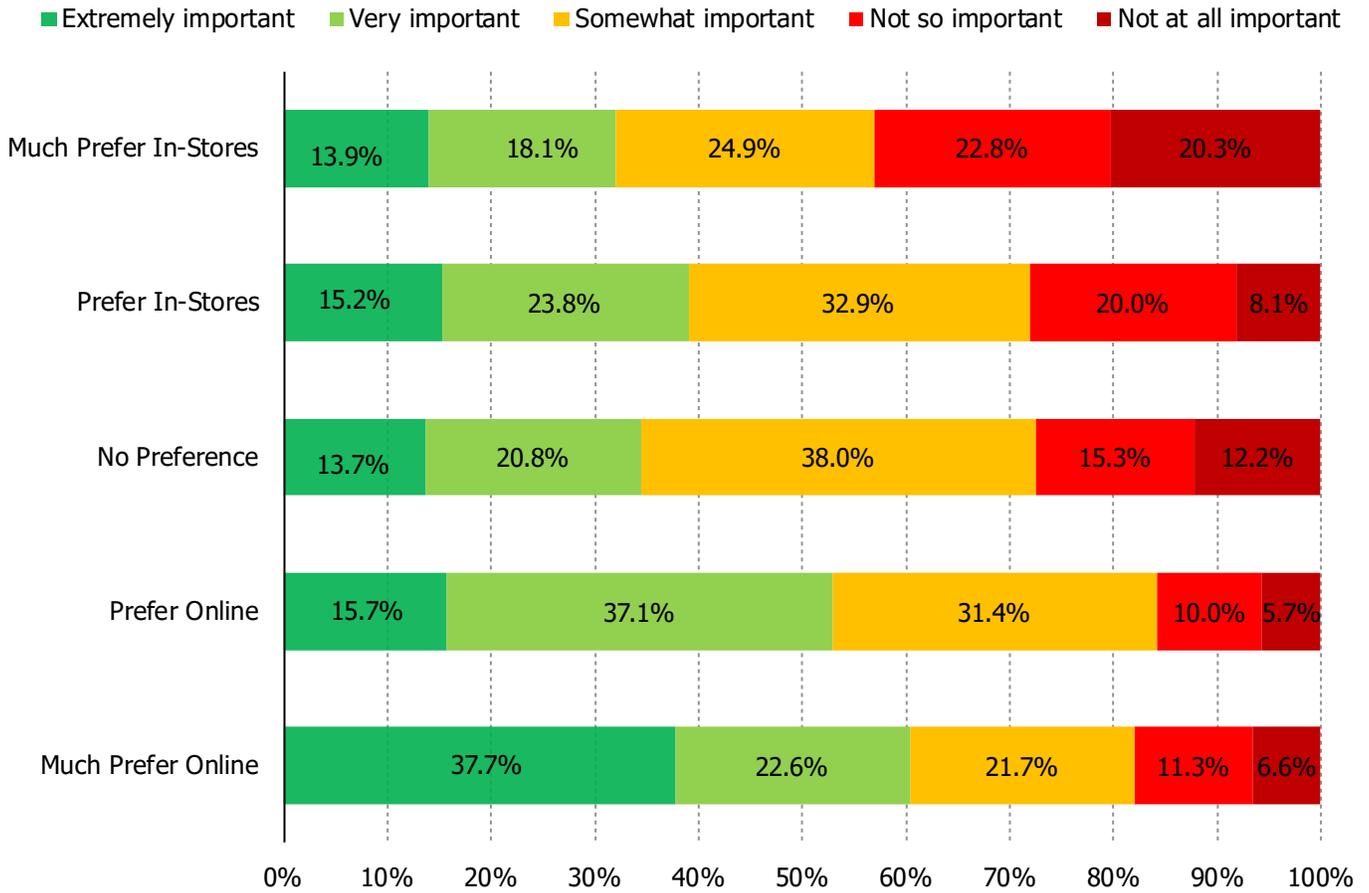
Cross-Tab Analysis

By How Consumers Prefer To Buy Footwear



HOW IMPORTANT IS THE FASHION COMPONENT OF SNEAKERS TO YOU?

Cross-Tab Analysis

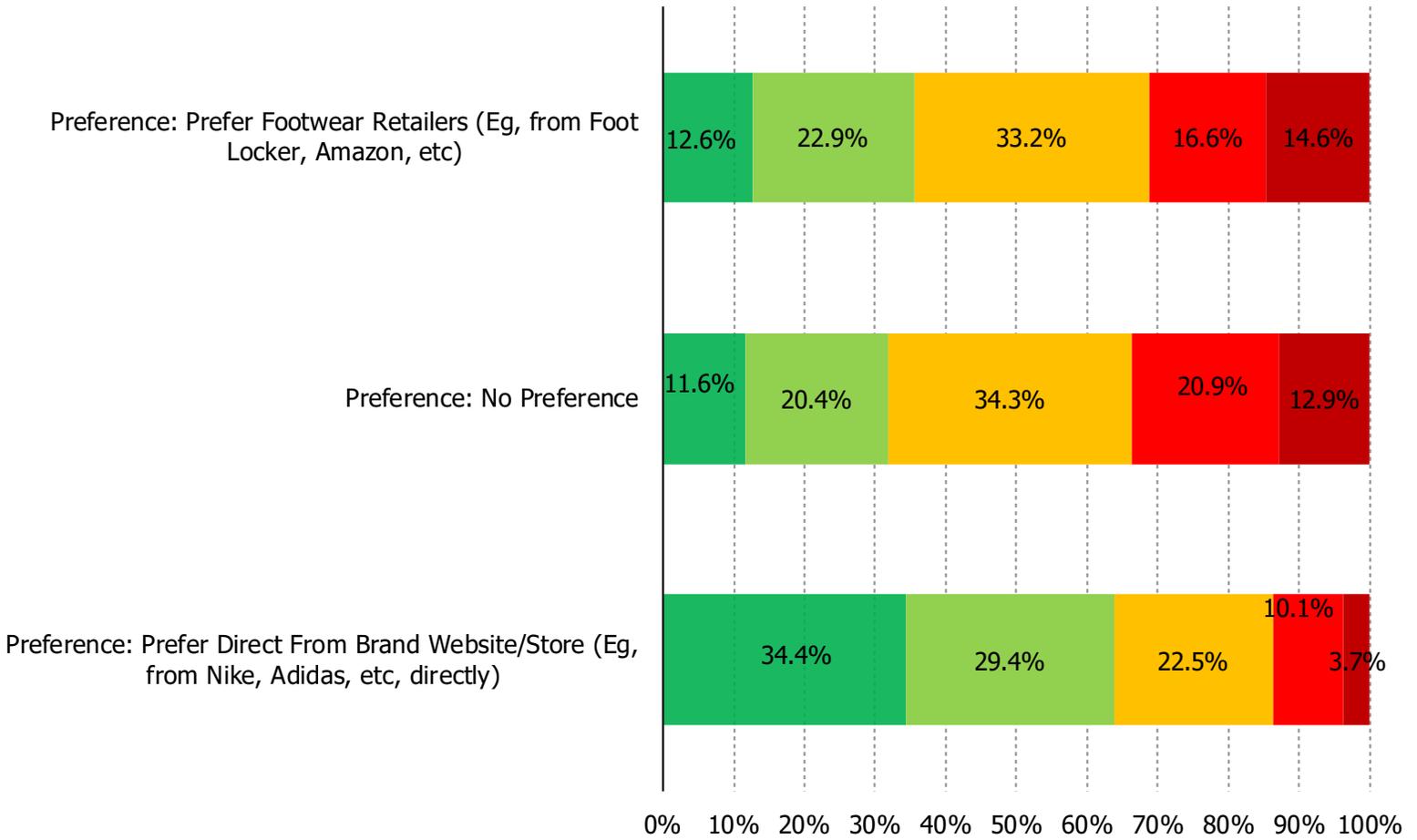


IE – respondents who much prefer buying footwear online are more likely to say the fashion component of sneakers is important to them...

HOW IMPORTANT IS THE FASHION COMPONENT OF SNEAKERS TO YOU?

Cross-Tab Analysis

Extremely important Very important Somewhat important Not so important Not at all important

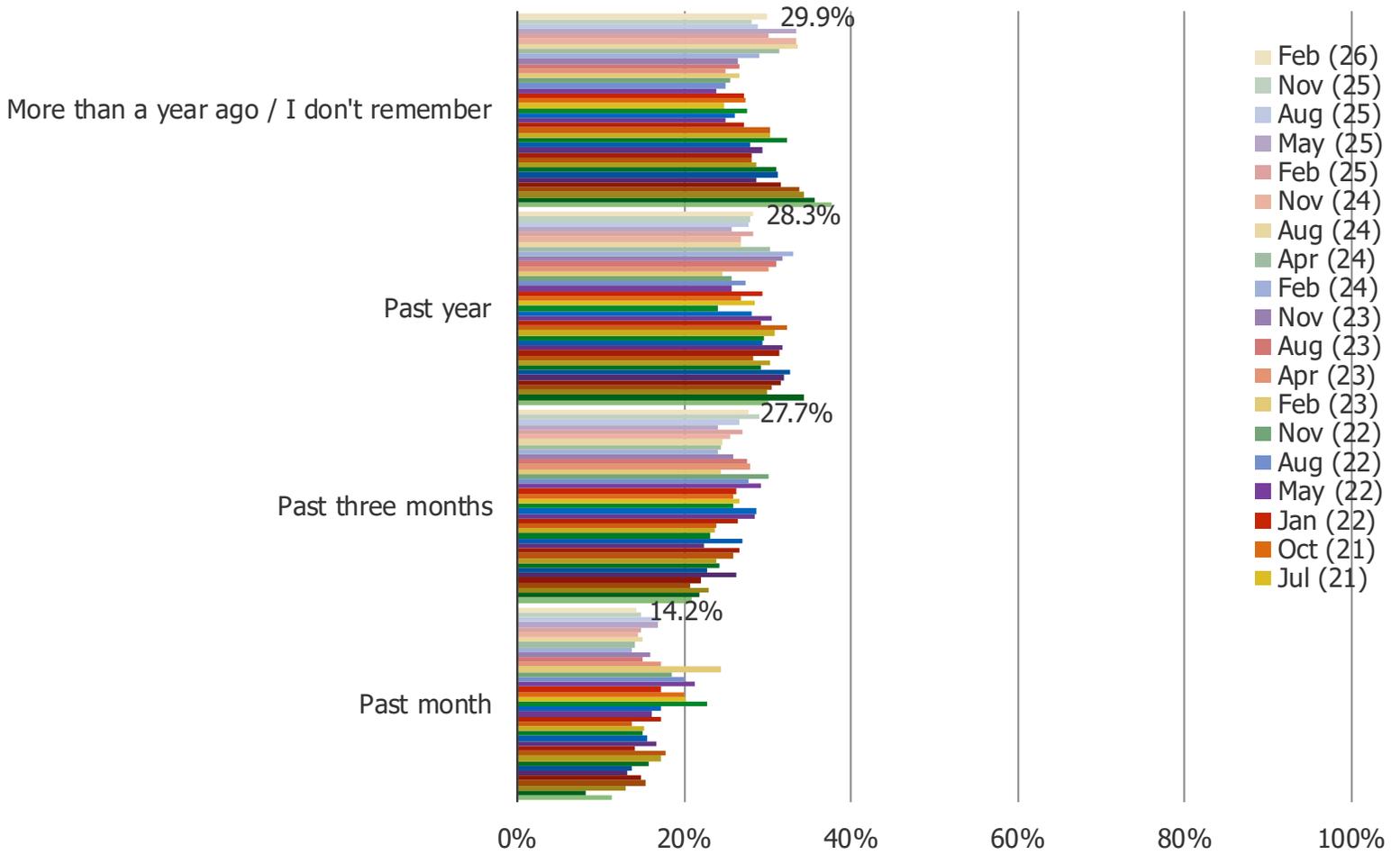


IE – respondents who prefer buying direct from the brand are more likely to say the fashion component of sneakers is important to them...

SNEAKER BUYING TRENDS

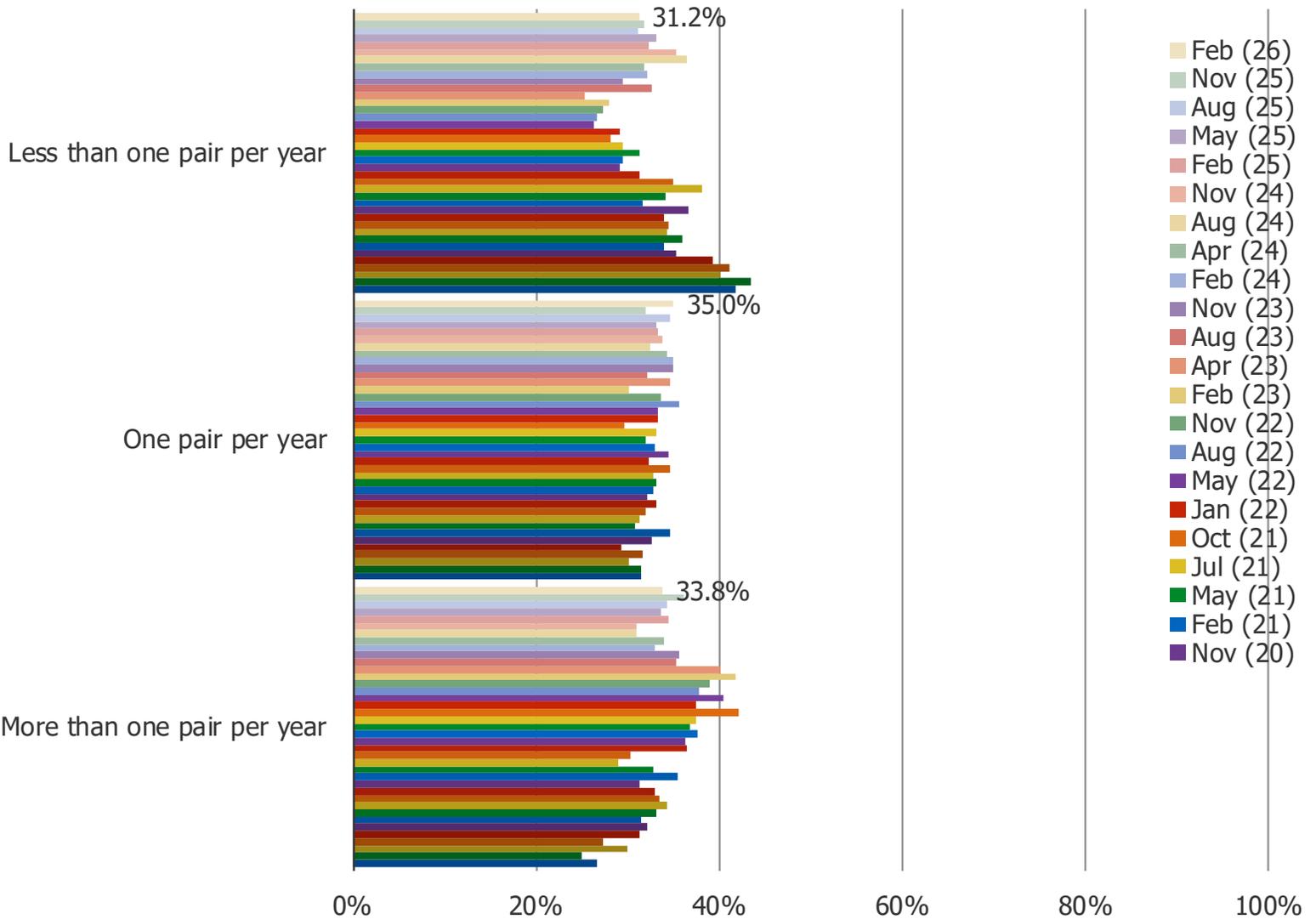
WHEN IS THE LAST TIME YOU BOUGHT A NEW PAIR OF SNEAKERS?

Posed to all respondents



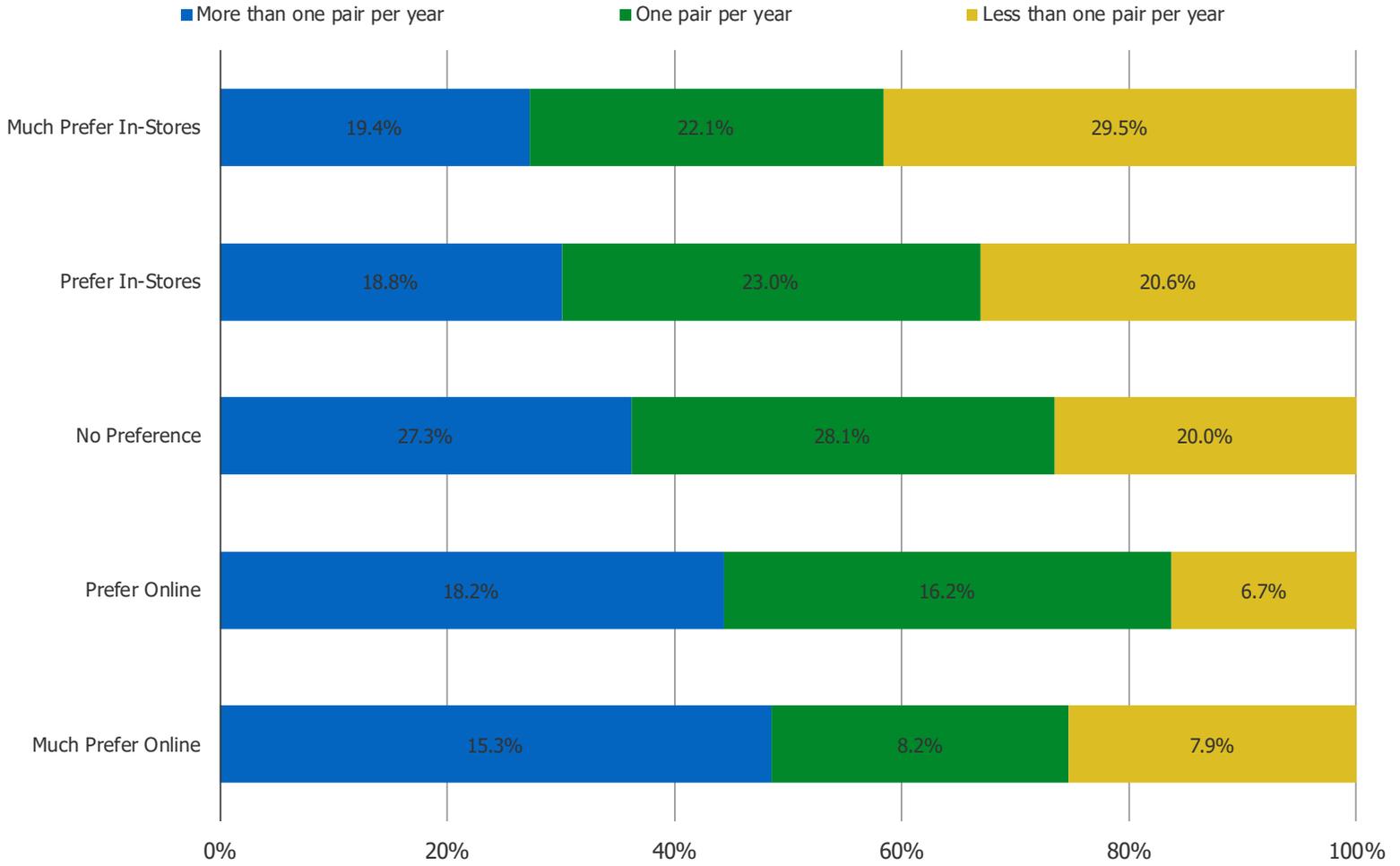
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

Posed to all respondents



HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

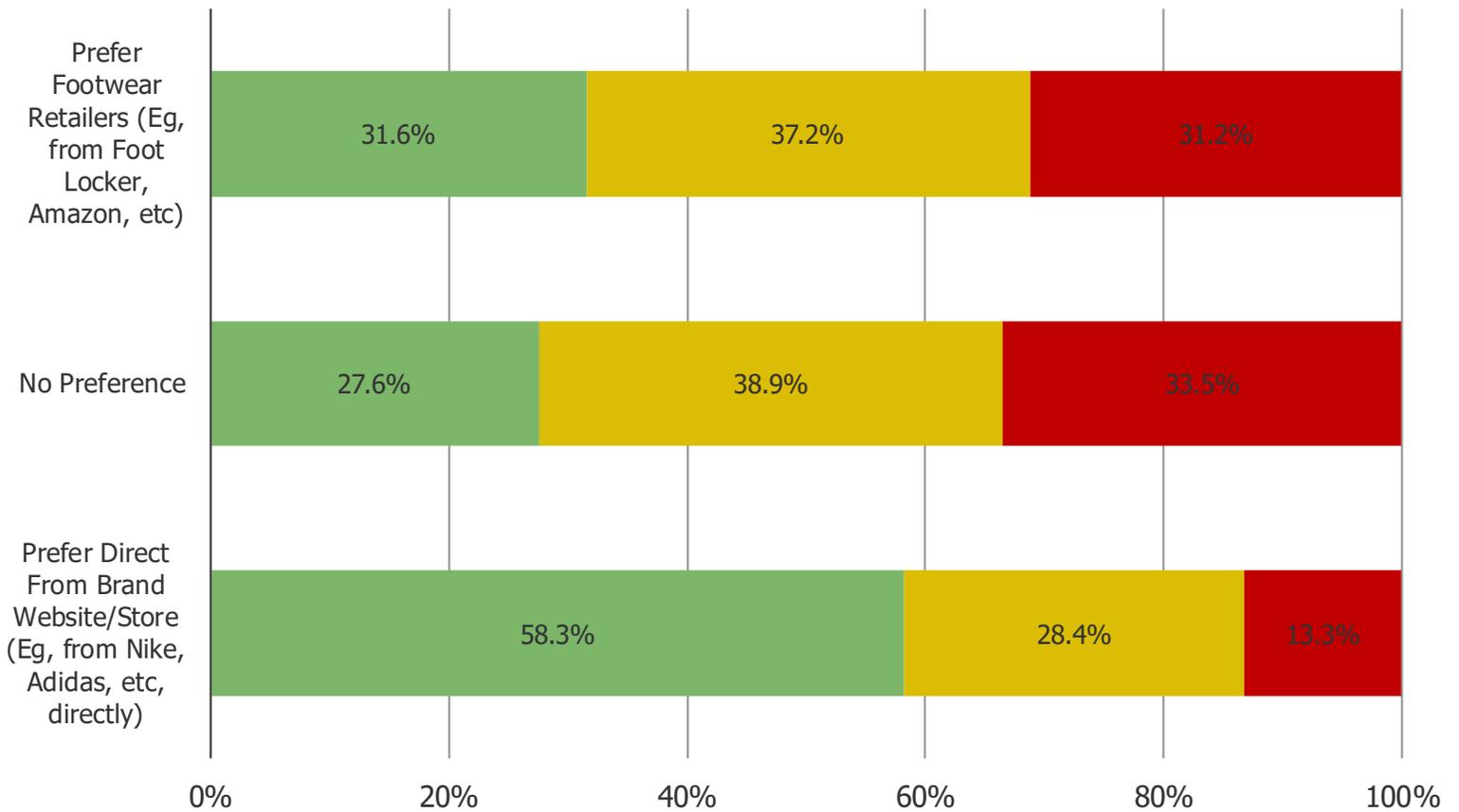
Posed to all respondents – Cross-tabbed by if they prefer to buy online vs. in-stores.



HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

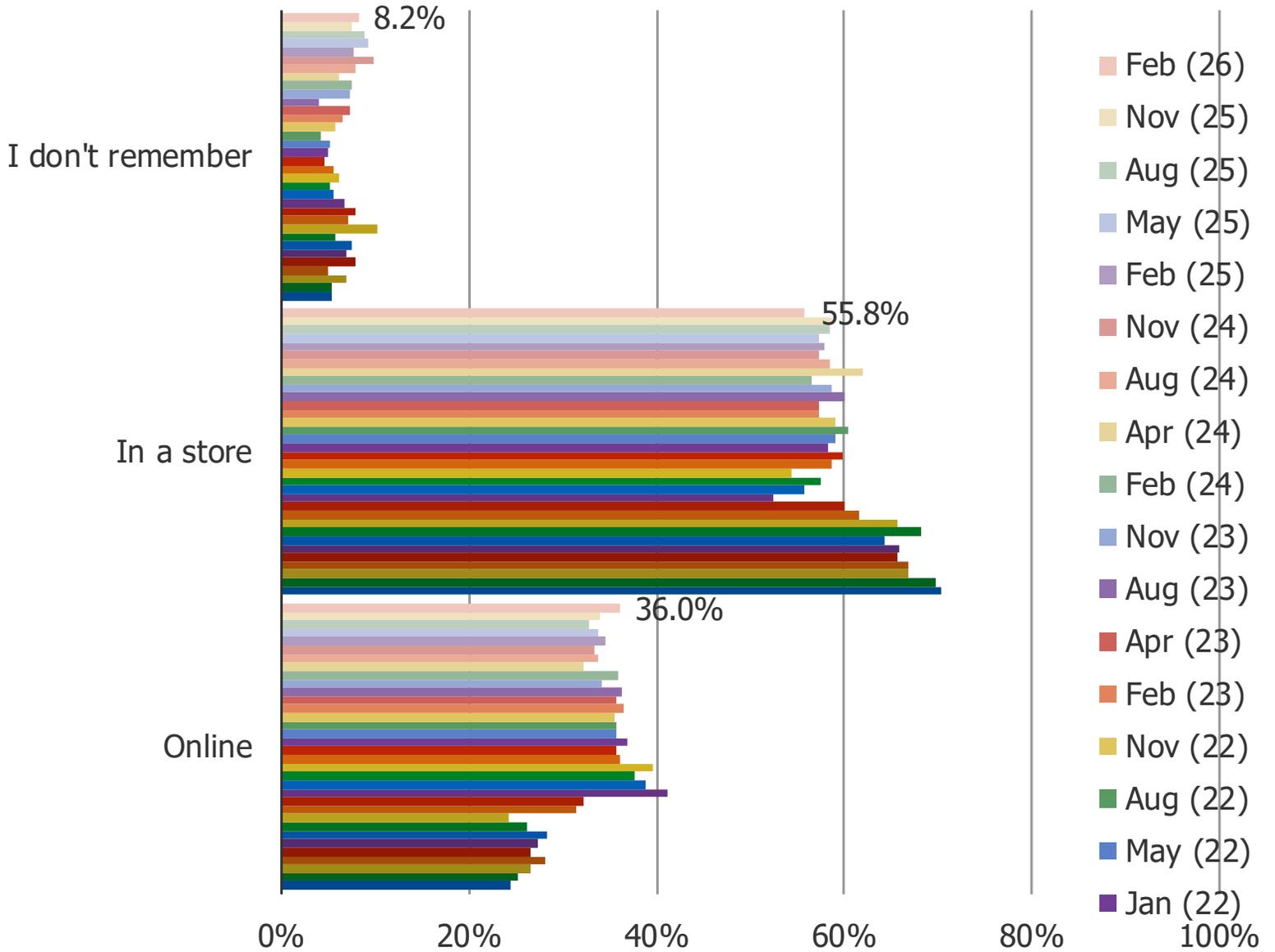
Posed to all respondents – Cross-tabbed by if they prefer to buy direct or from retailers.

■ More than one pair per year ■ One pair per year ■ Less than one pair per year



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

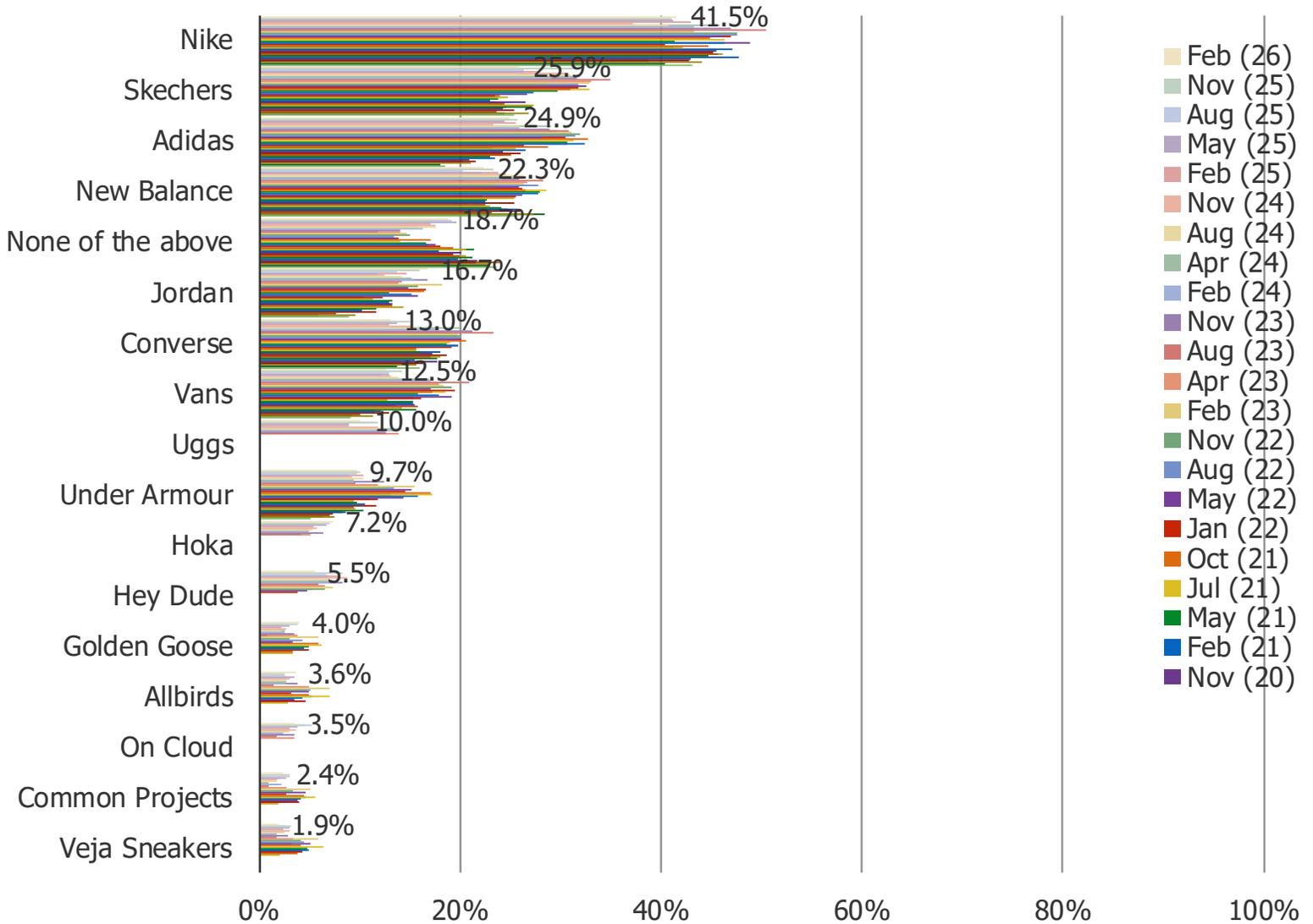
Posed to all respondents



SNEAKER BRANDS

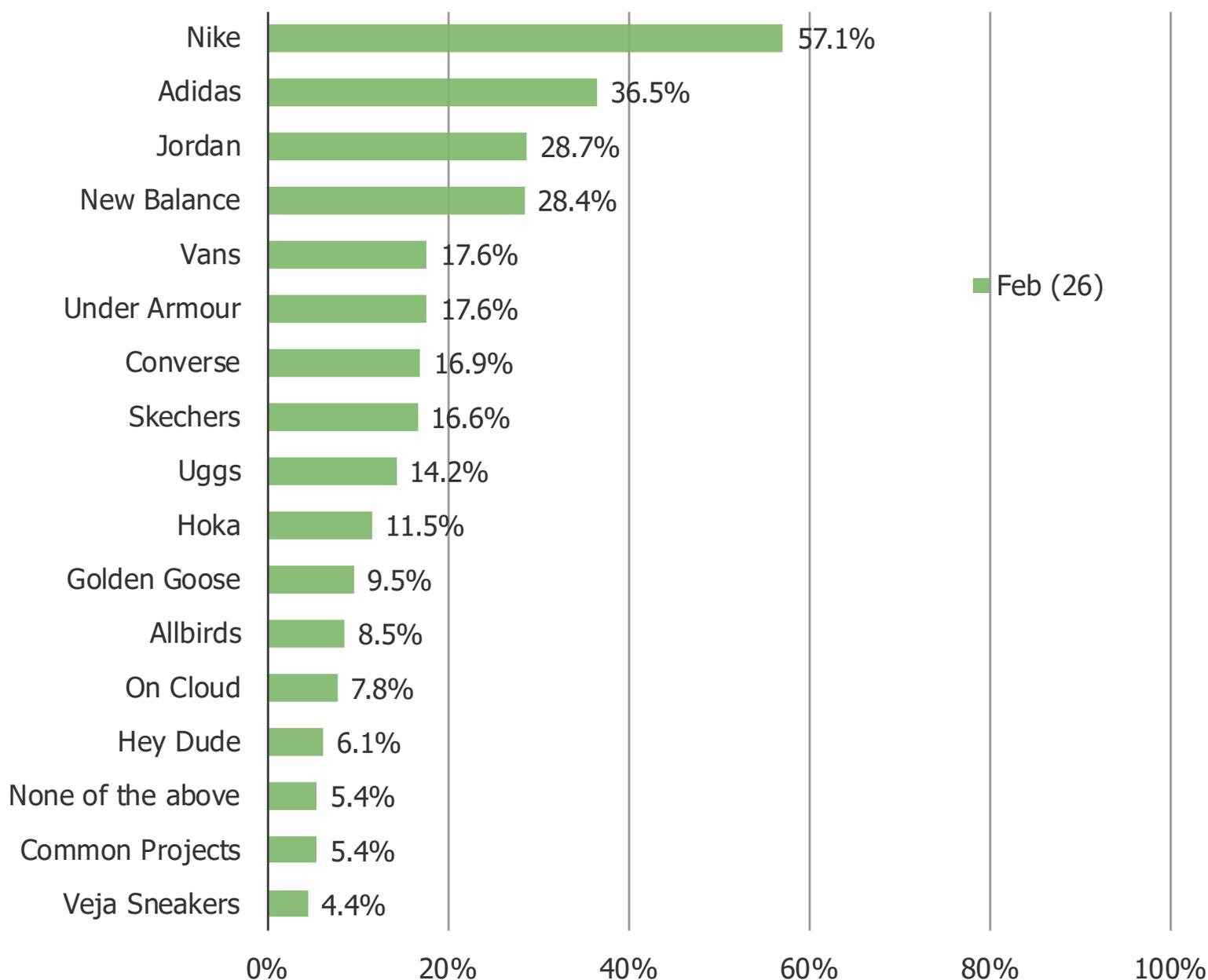
WHICH OF THE FOLLOWING BRANDS DO YOU OWN SNEAKERS FROM?

Posed to all respondents



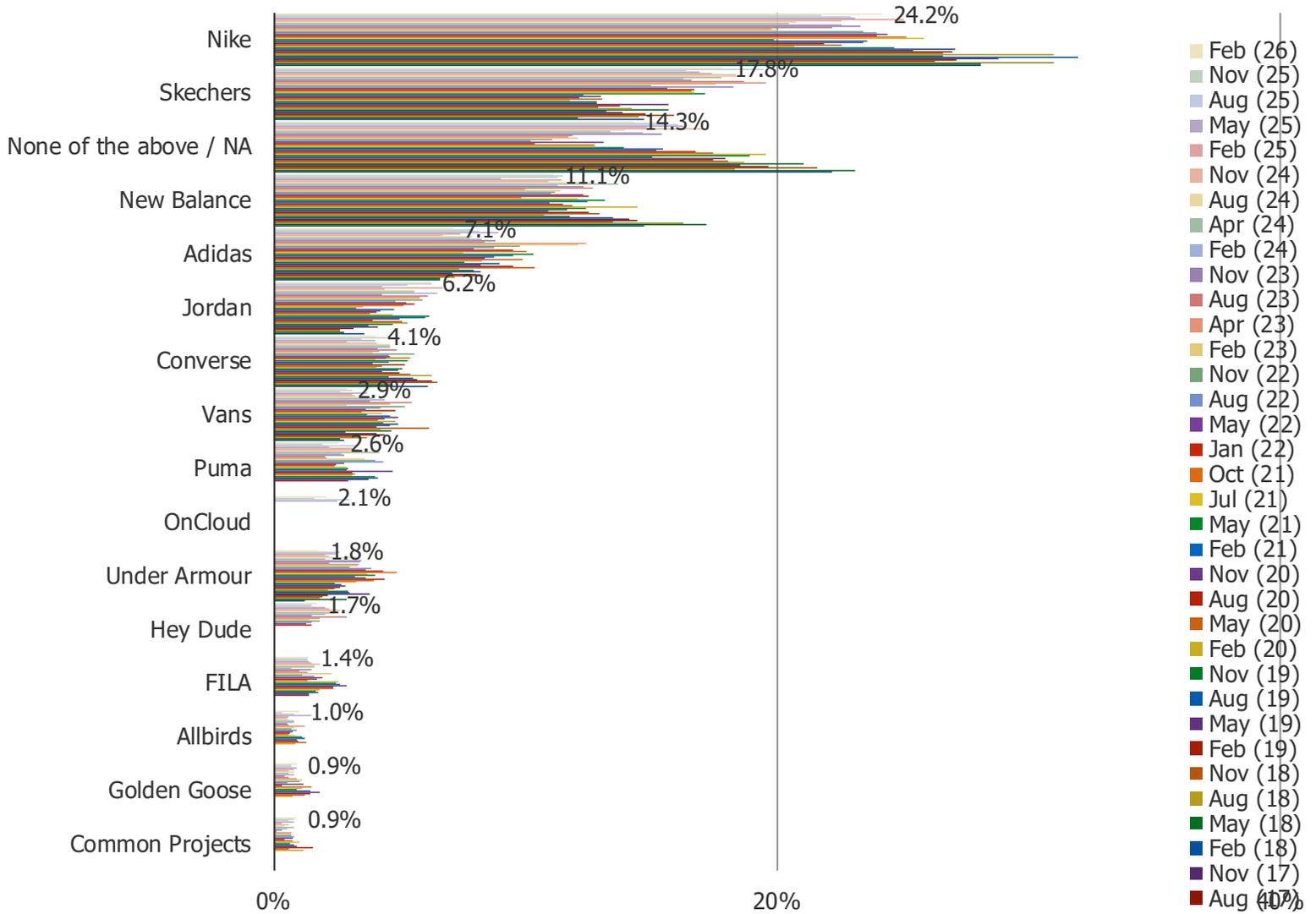
WHICH OF THE FOLLOWING FOOTWEAR BRANDS DO YOU OWN SNEAKERS/FOOTWEAR FROM?

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



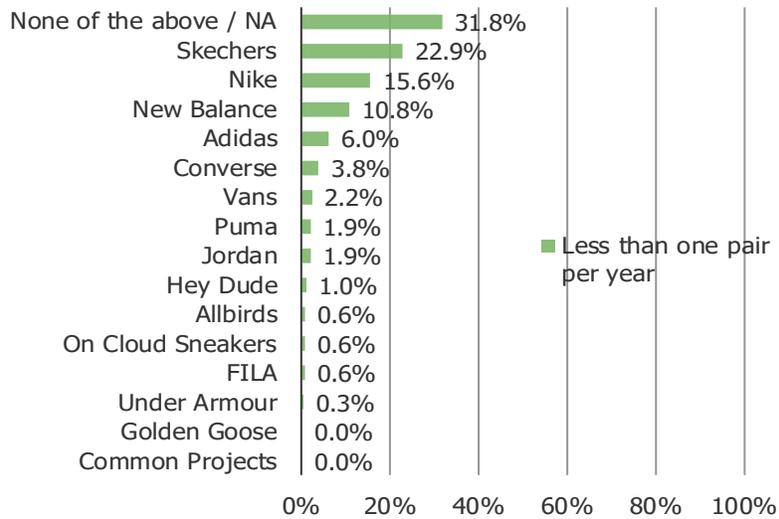
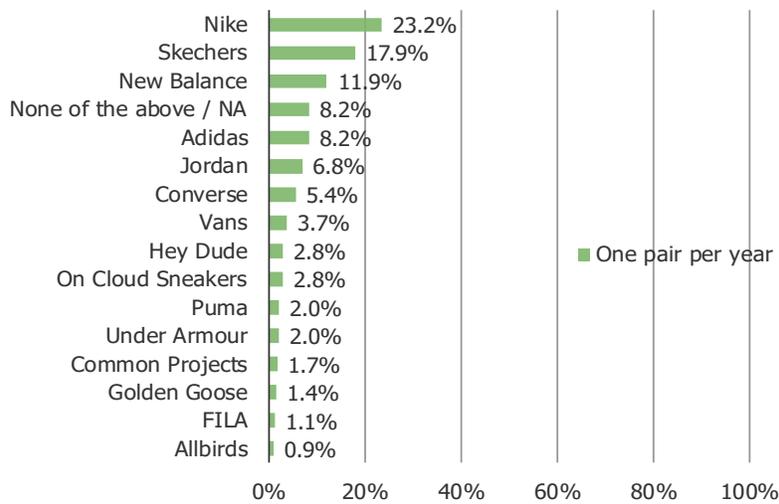
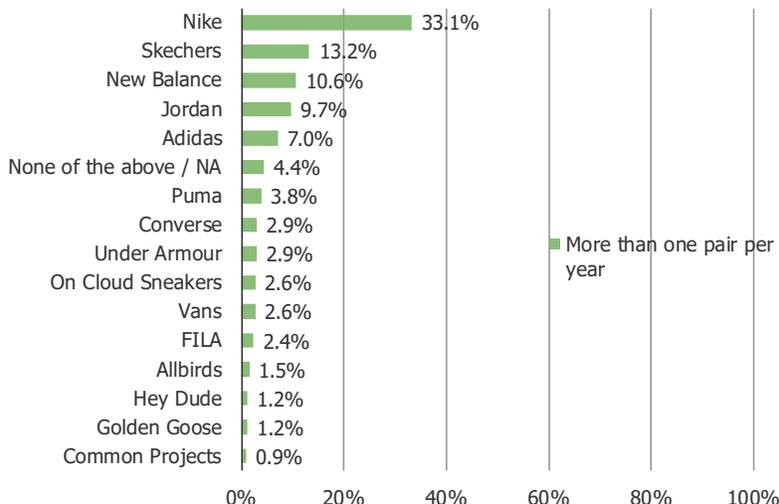
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

Posed to all respondents



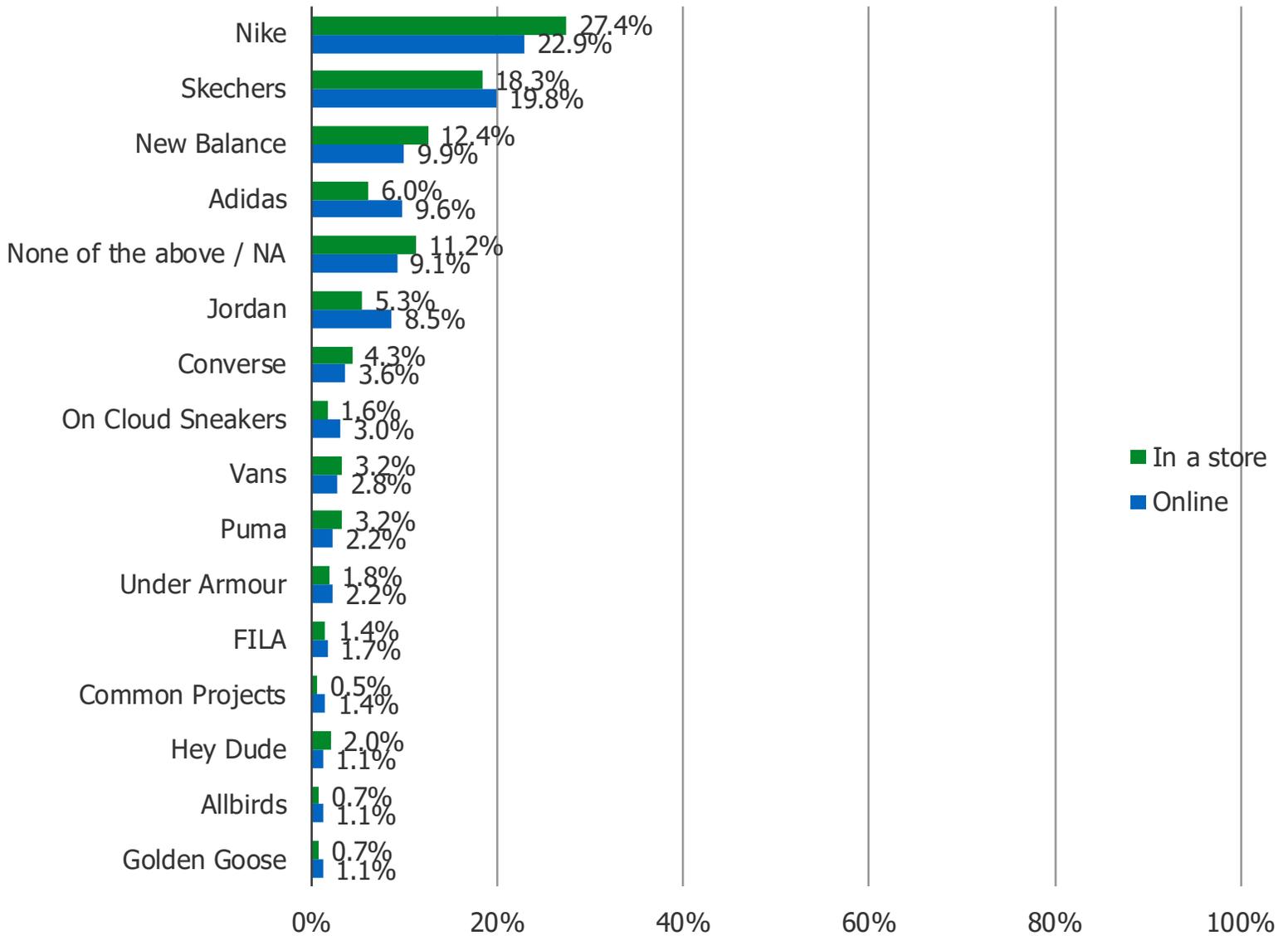
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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



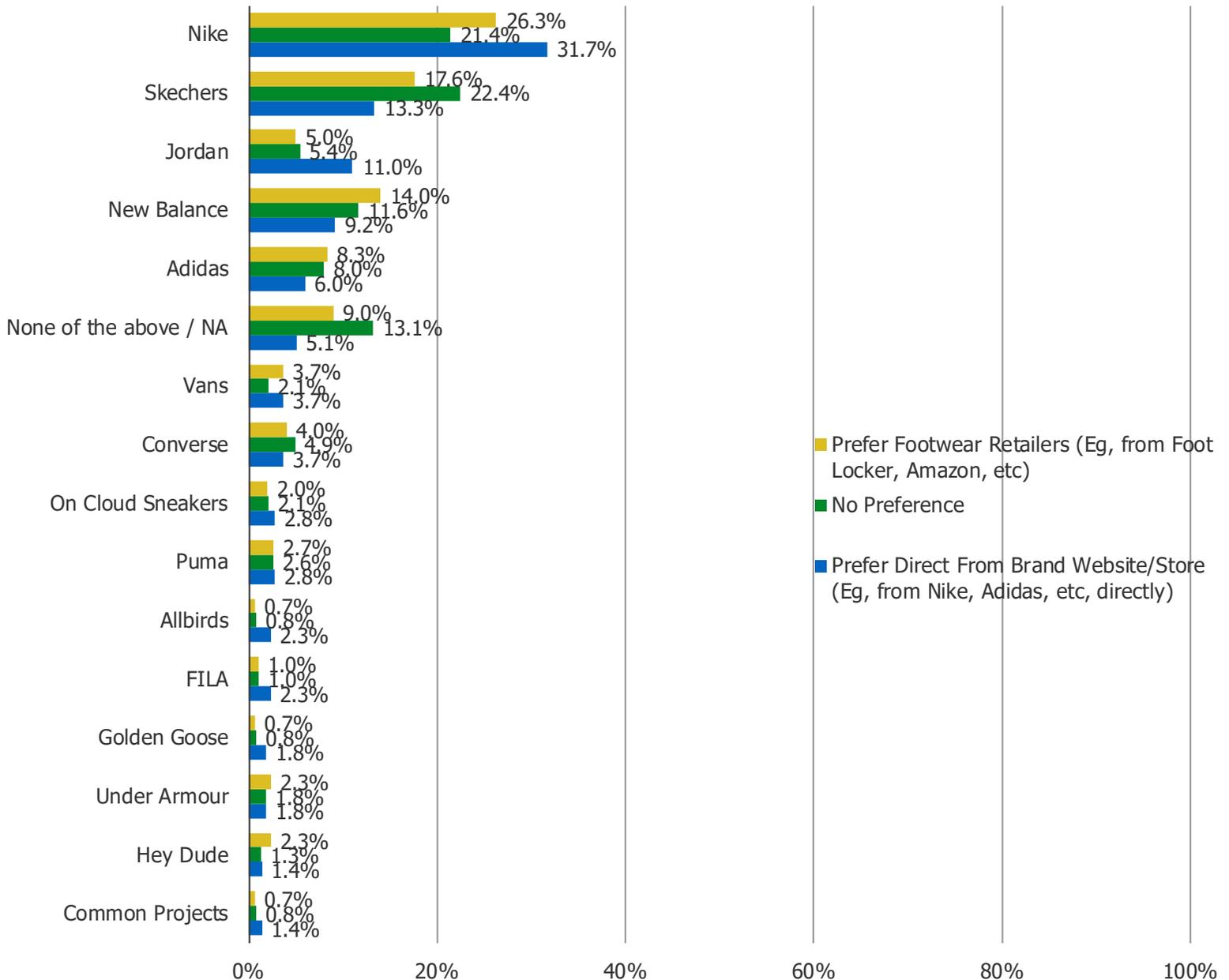
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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



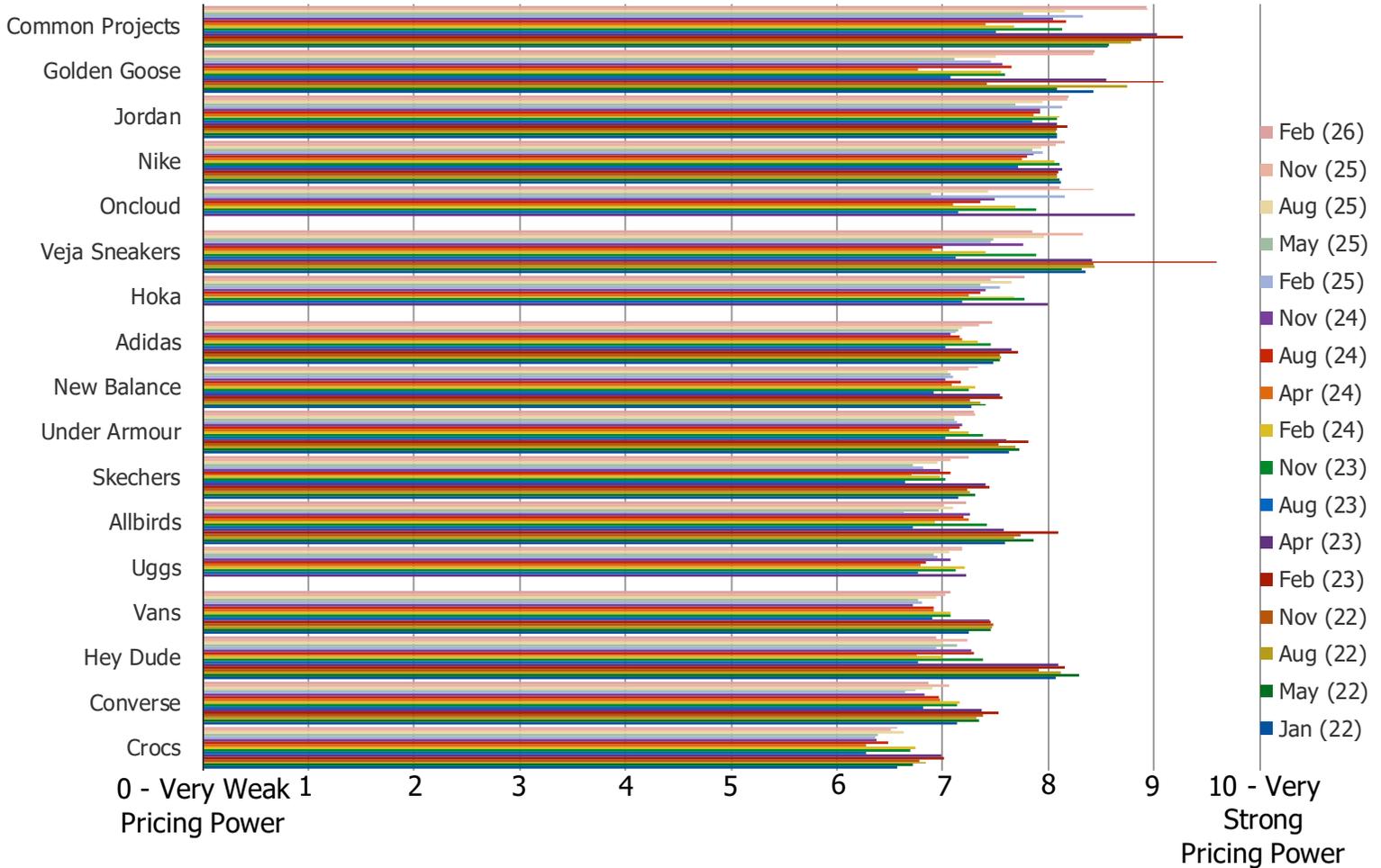
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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?

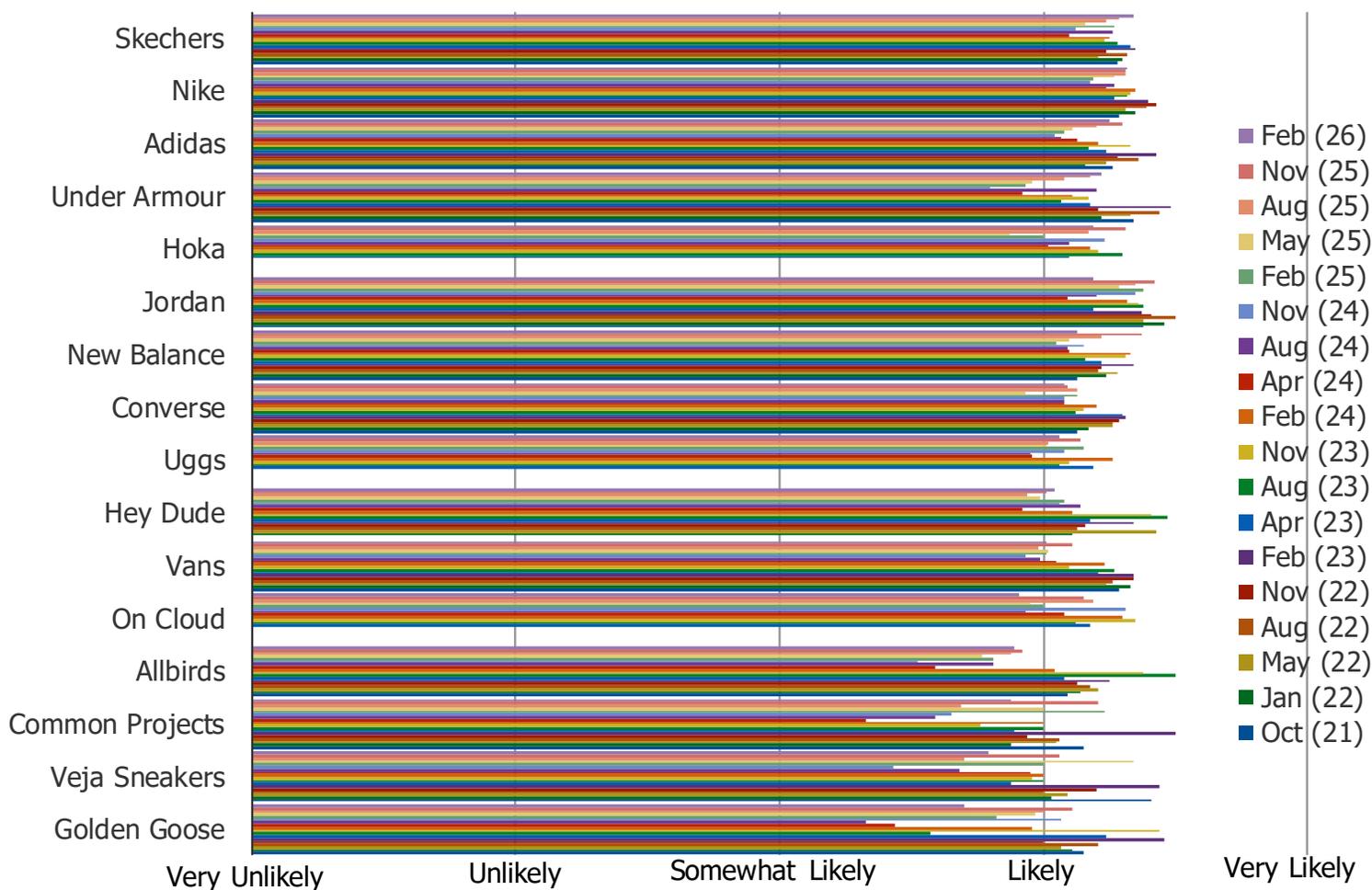
Posed to respondents who have heard of each of the following:



	N=
Adidas	637
Skechers	577
Nike	717
Jordan	511
Under Armour	424
Converse	539
Vans	457
New Balance	552
Common Projects	30
Golden Goose	64
Veja Sneakers	53
Allbirds	99
Hey Dude	189
Crocs	513
Hoka	239
Oncloud	77
Uggs	450

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

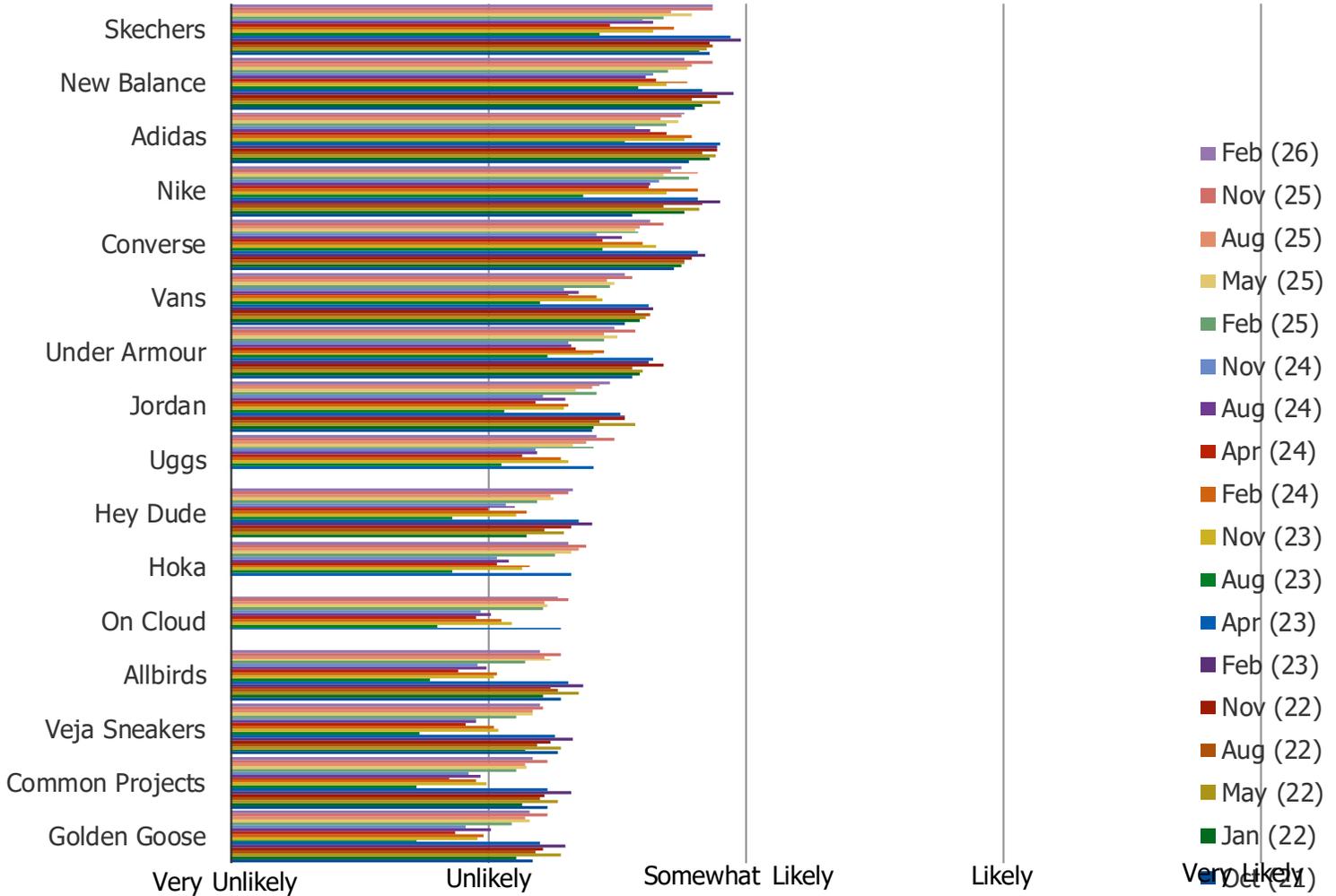
Posed to respondents who own footwear from each of the following.



	N=
Adidas	251
Skechers	261
Nike	419
Jordan	168
Under Armour	98
Converse	131
Vans	126
New Balance	225
Common Projects	24
Golden Goose	40
Veja Sneakers	19
Allbirds	36
Hey Dude	55
Hoka	73
On Cloud	35
Uggs	101

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

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

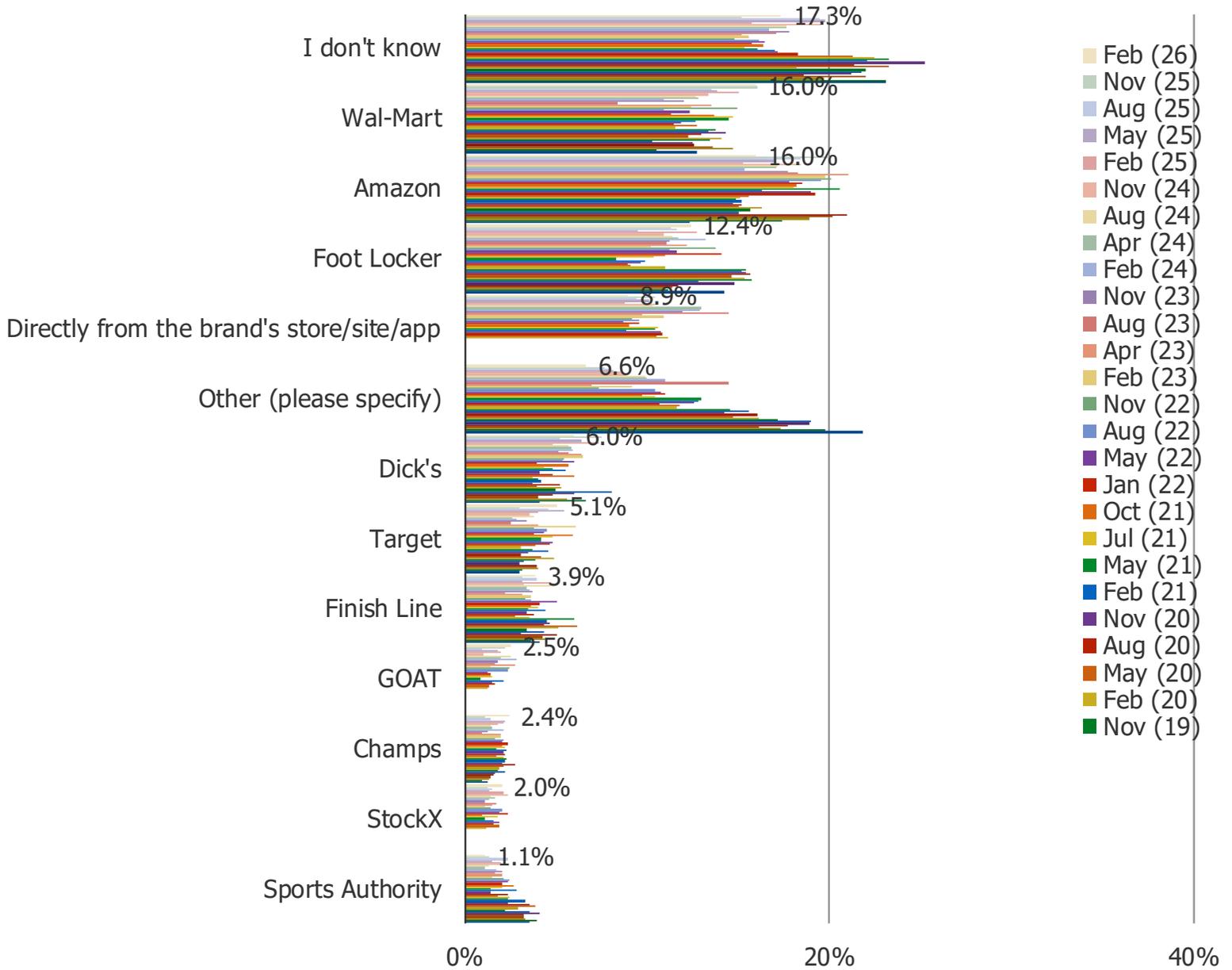


	N=
Adidas	758
Skechers	748
Nike	590
Jordan	841
Under Armour	911
Converse	878
Vans	883
New Balance	784
Common Projects	985
Golden Goose	969
Veja Sneakers	990
Allbirds	973
Hey Dude	954
Hoka	936
On Cloud	974
Uggs	908

FOOTWEAR RETAILERS

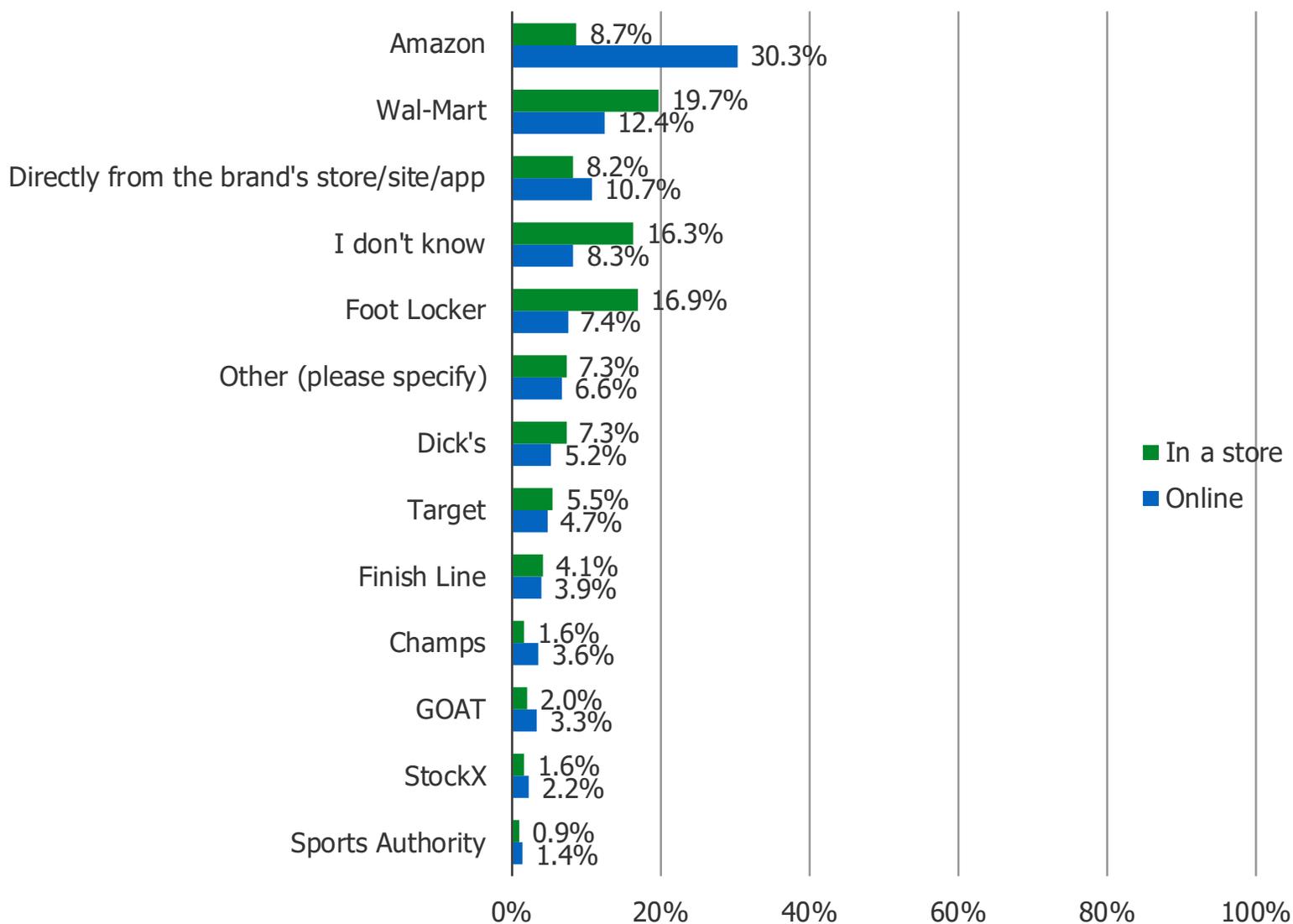
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

Posed to all respondents



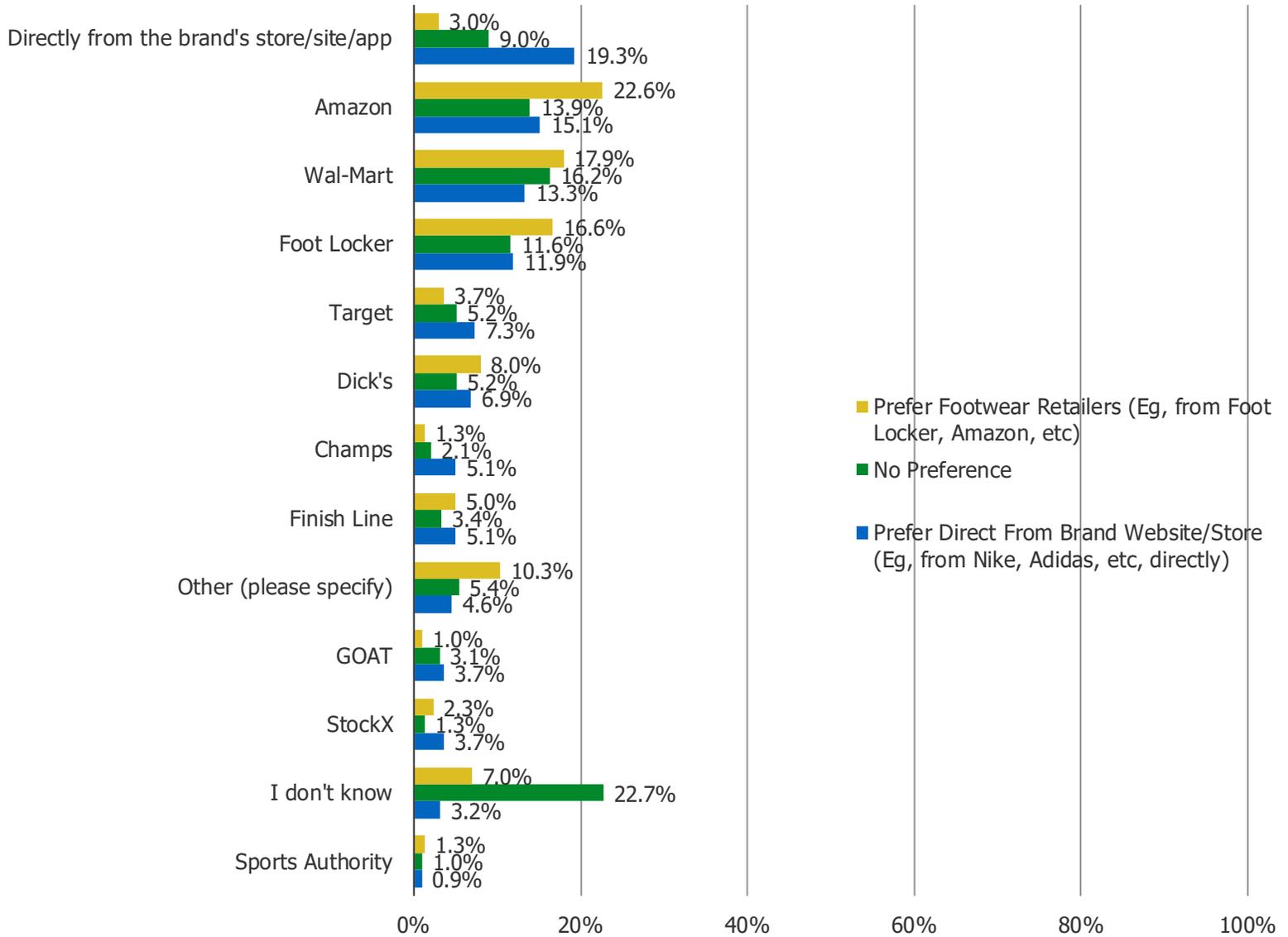
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



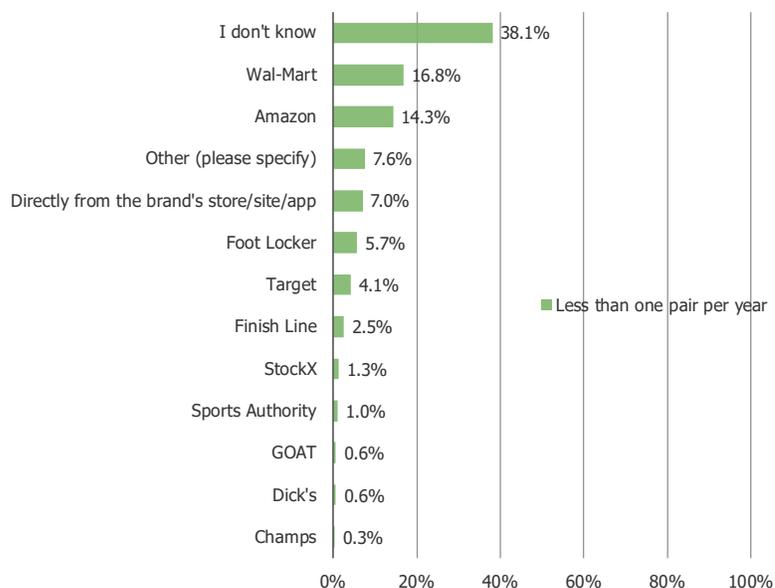
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



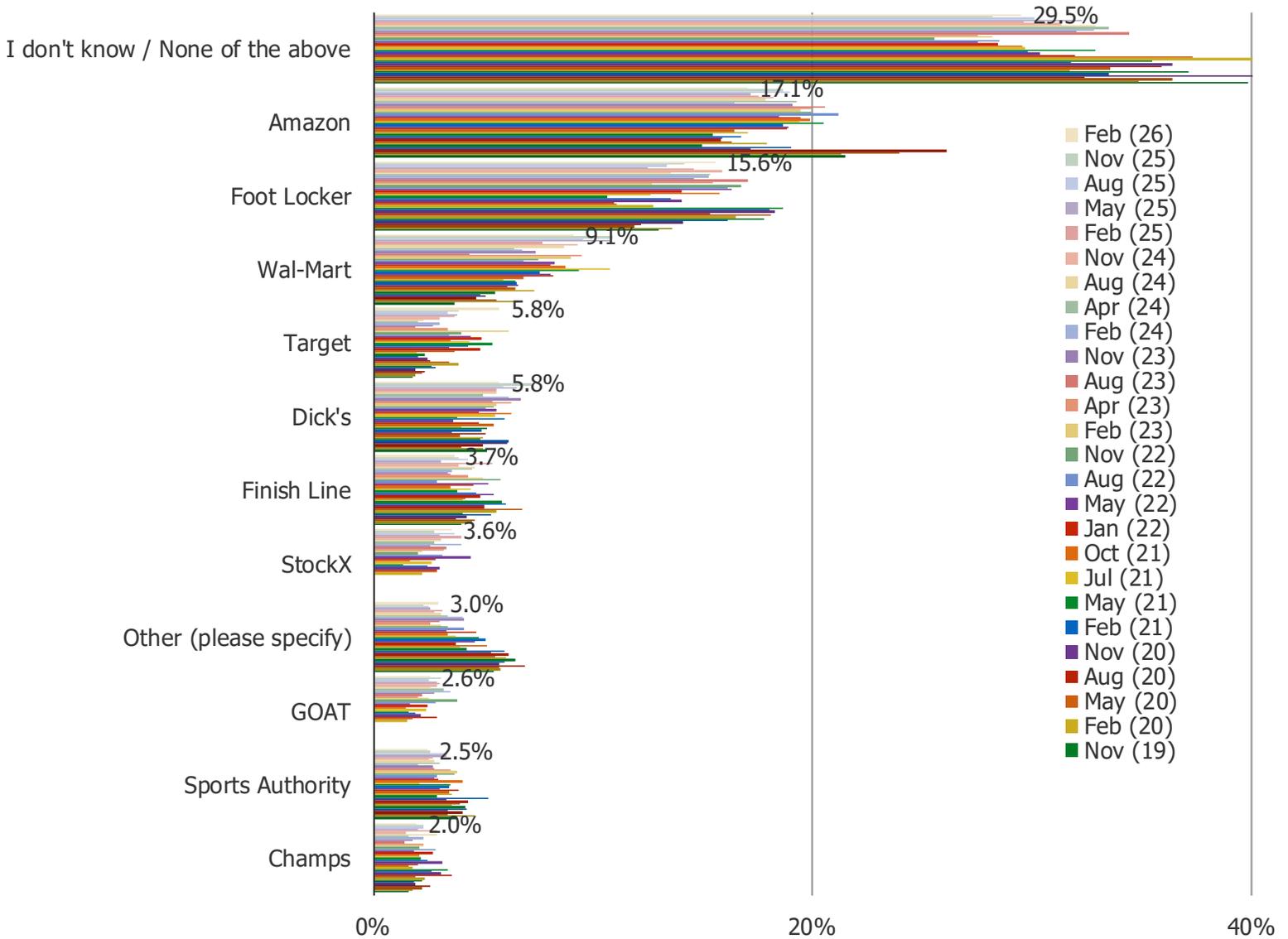
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



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

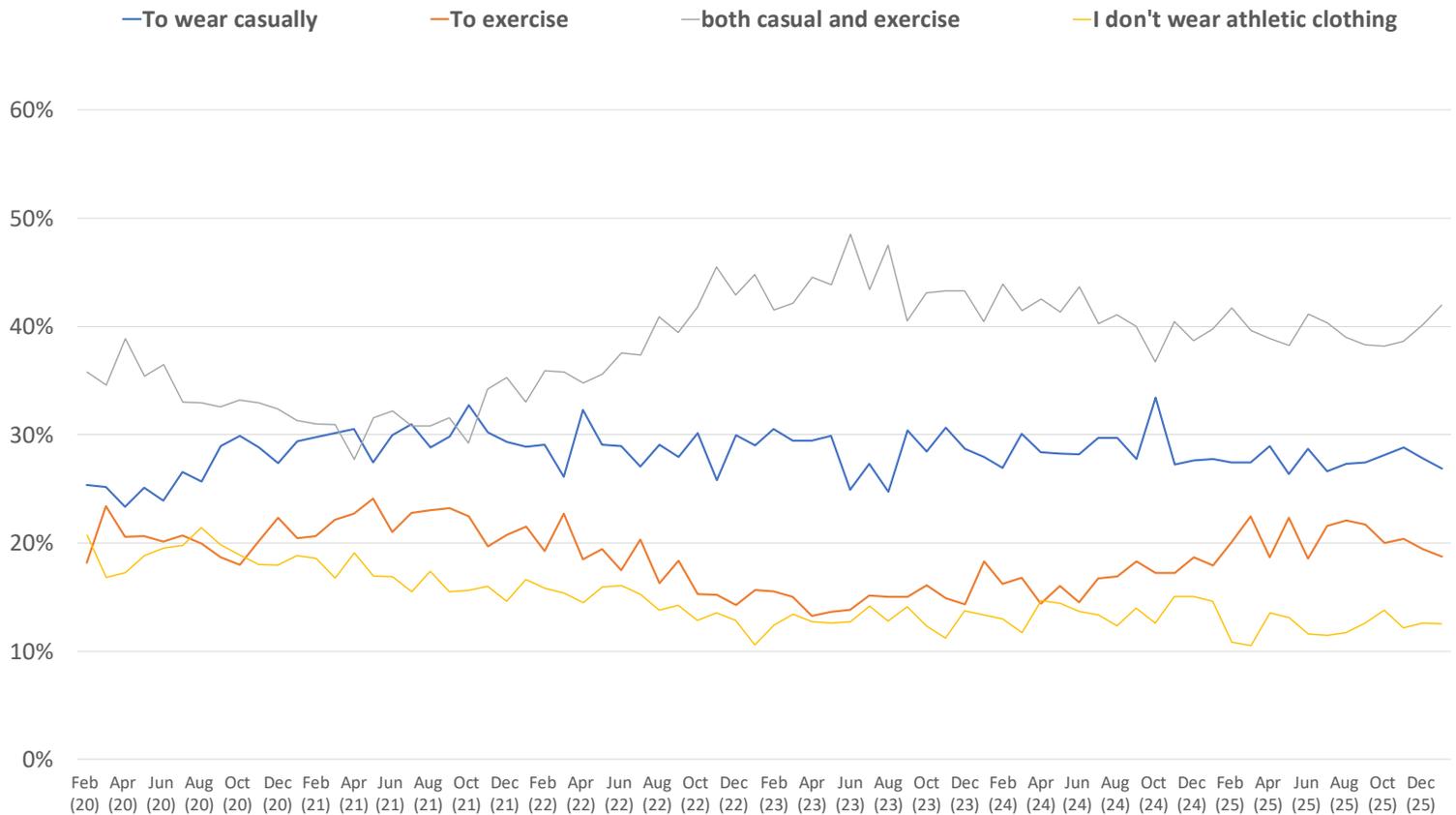
Posed to all respondents



CASUAL WEAR

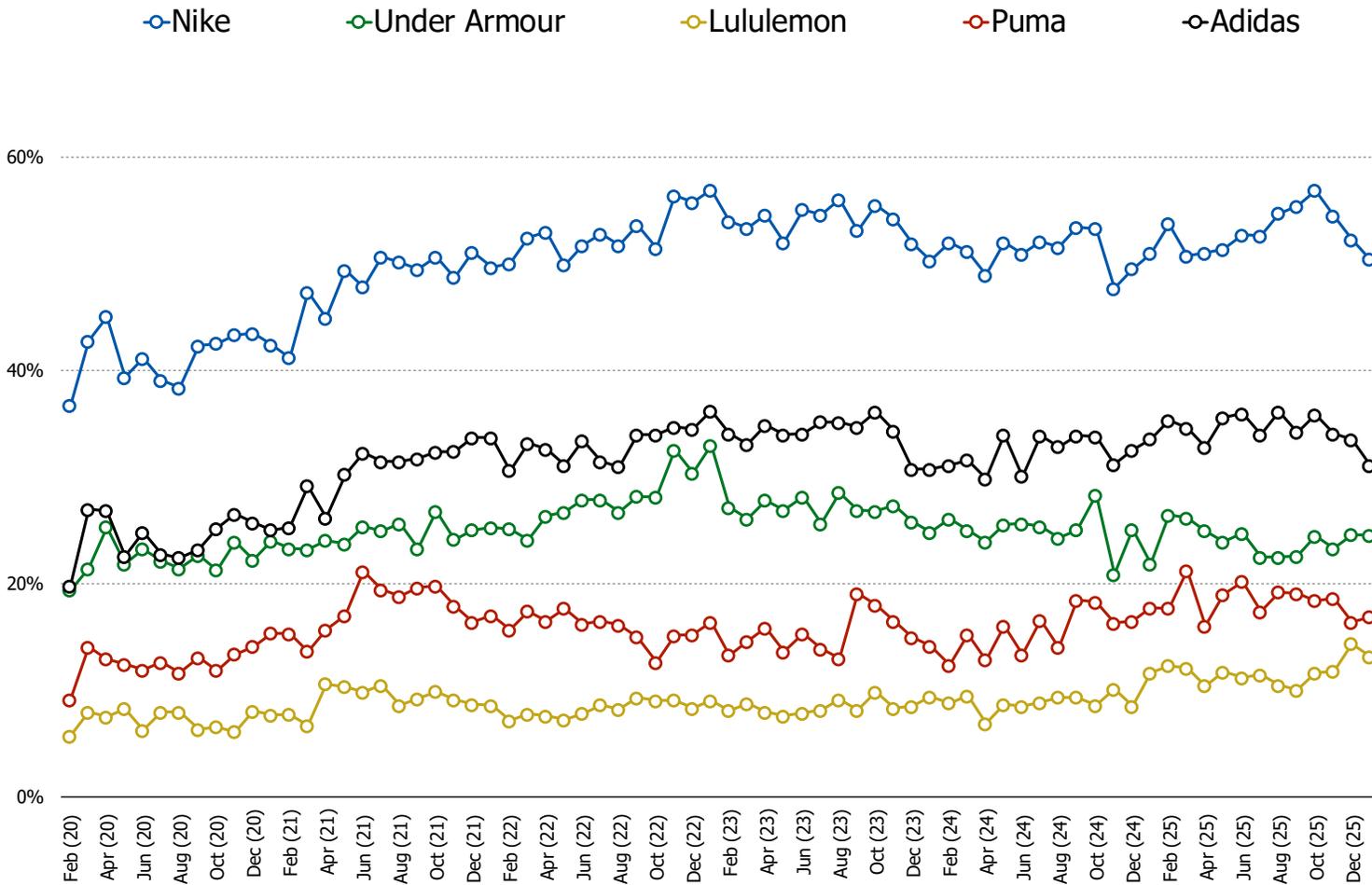
WHAT DO YOU USE ATHLETIC CLOTHING FOR?

Posed to all respondents



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

Posed to all respondents

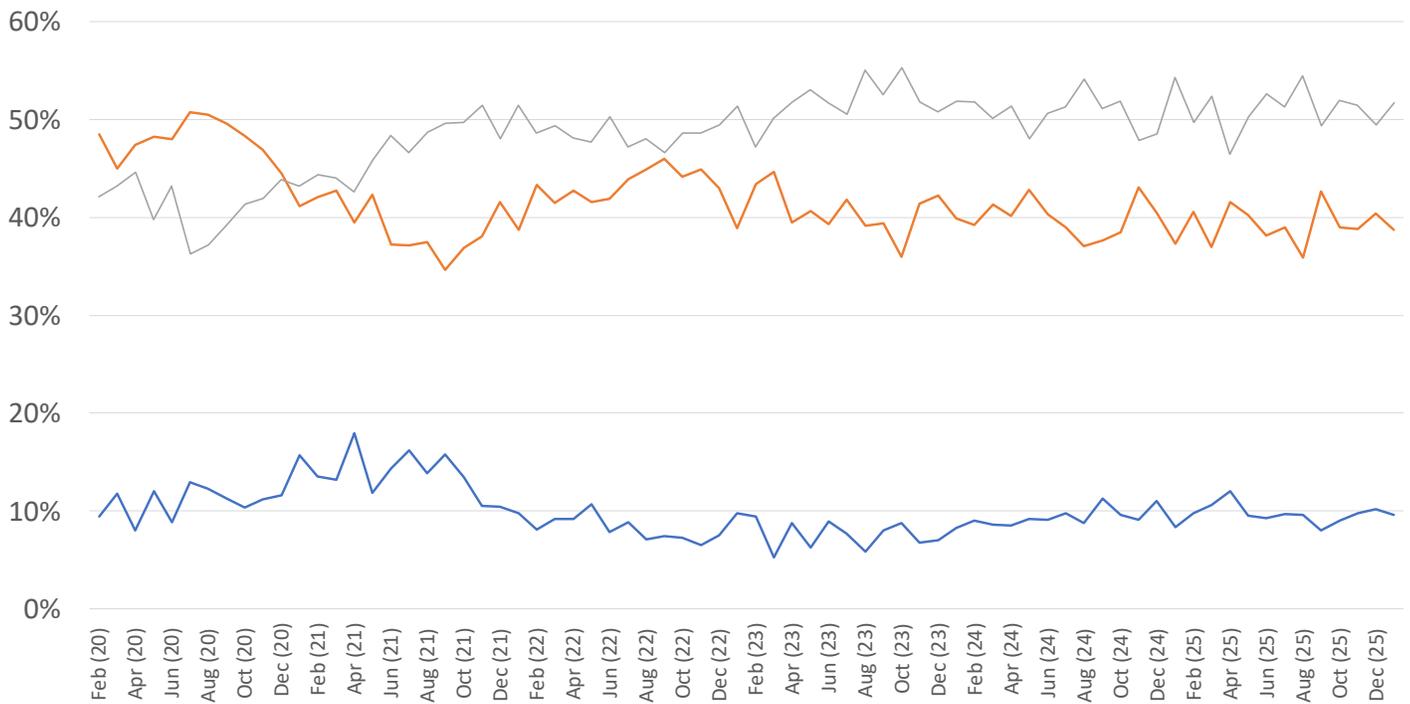


IN YOUR OPINION, HOW DOES THIS BRAND'S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

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

NIKE

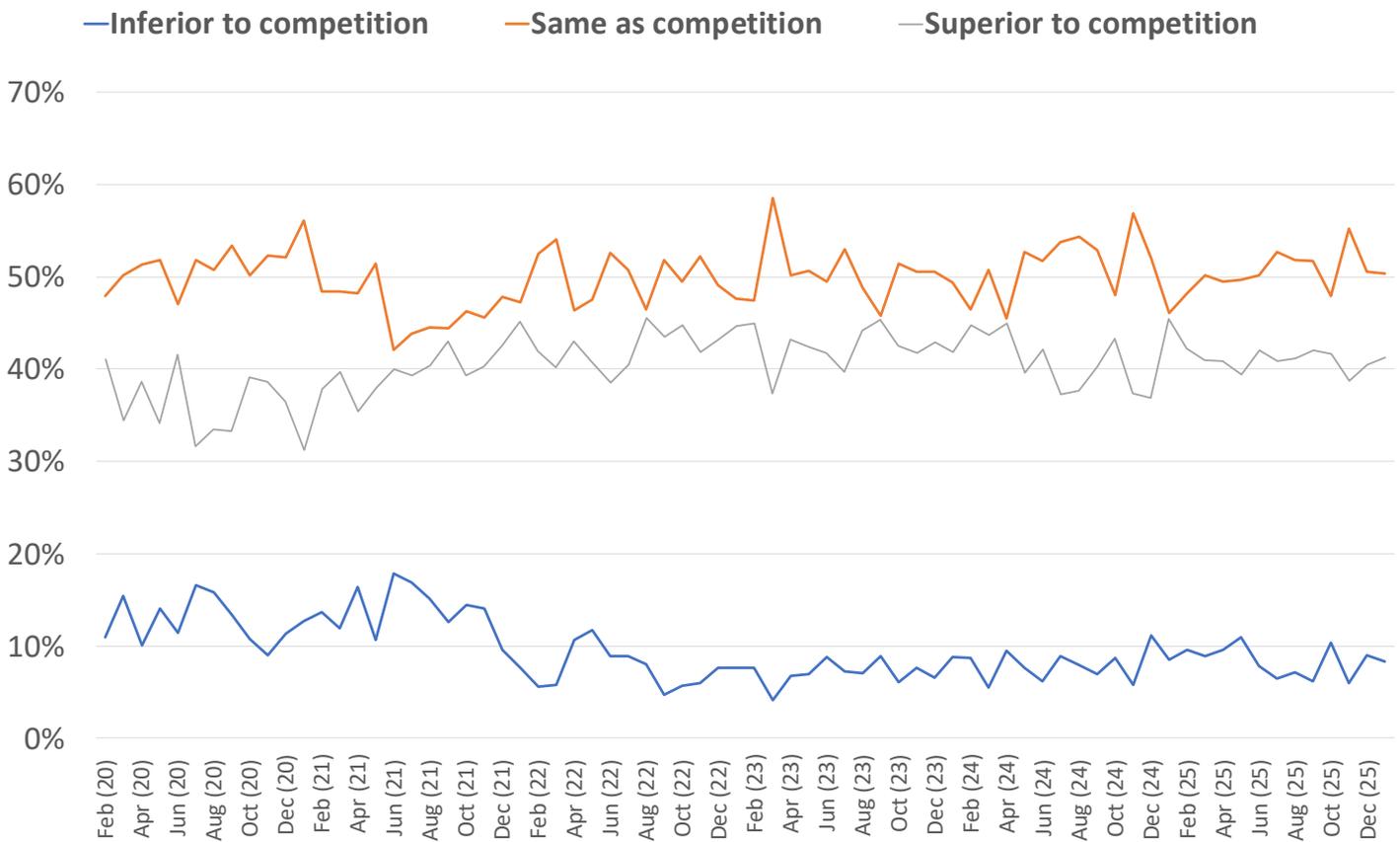
— Inferior to competition — Same as competition — Superior to competition



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

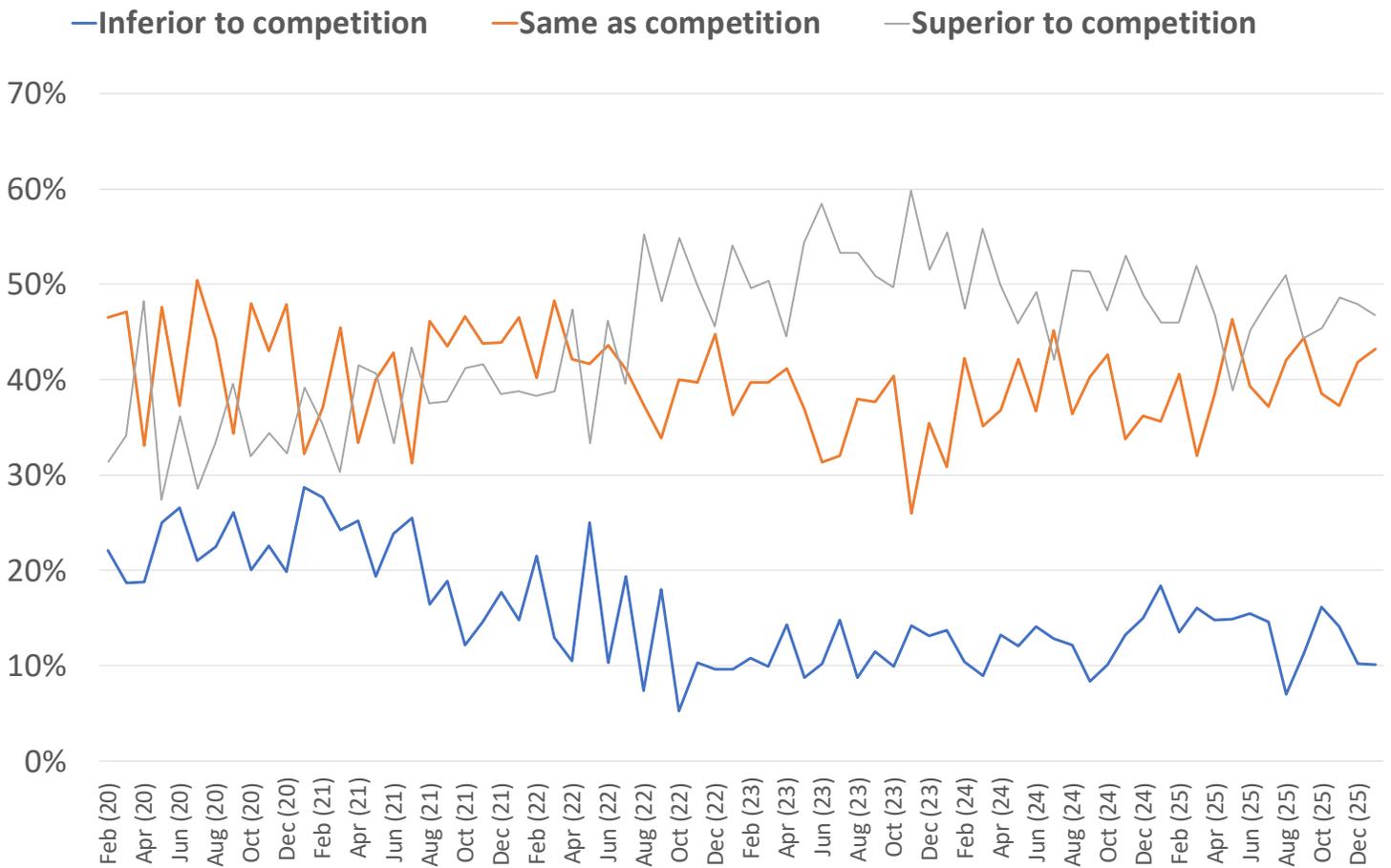
UNDER ARMOUR



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

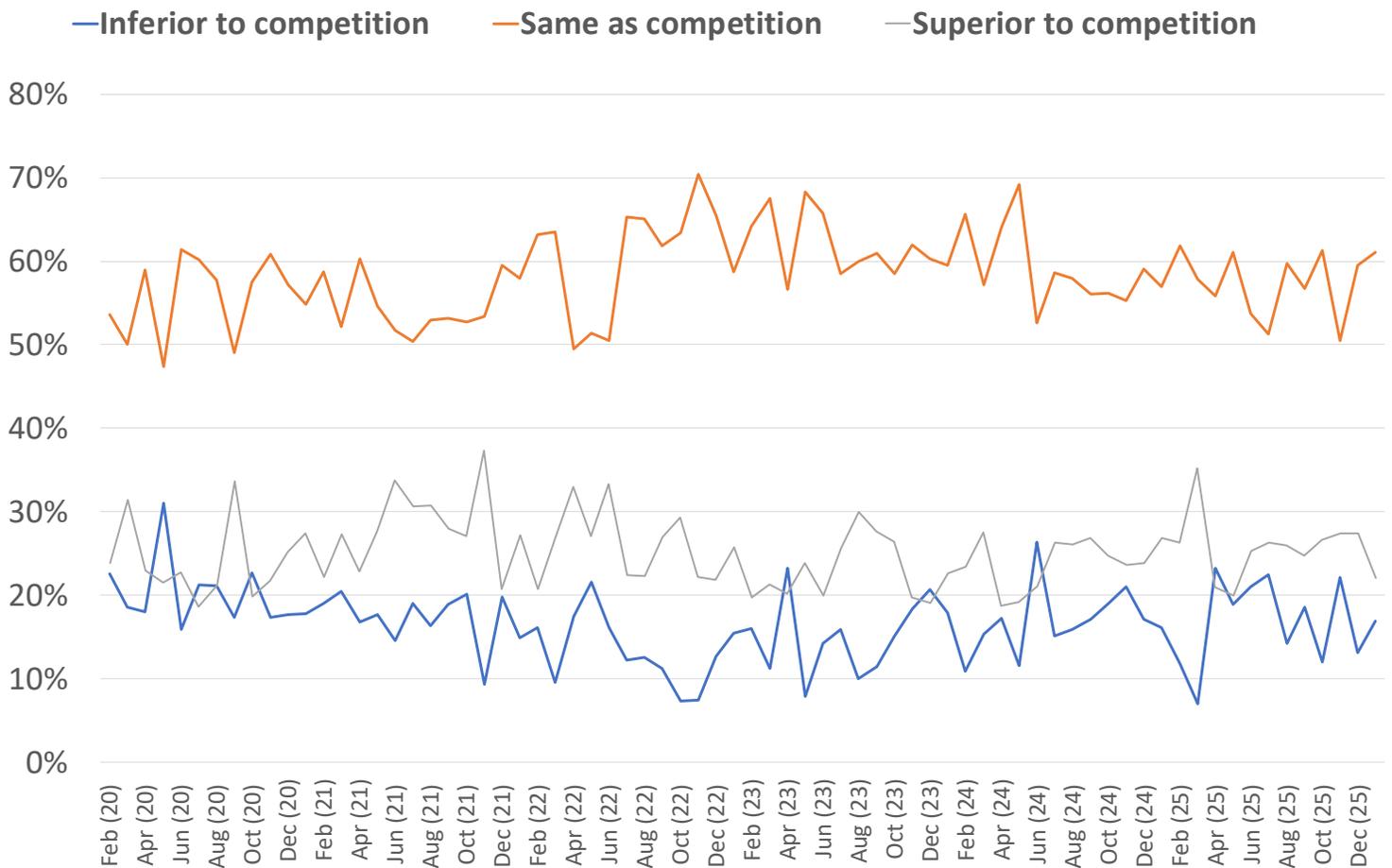
LULULEMON



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

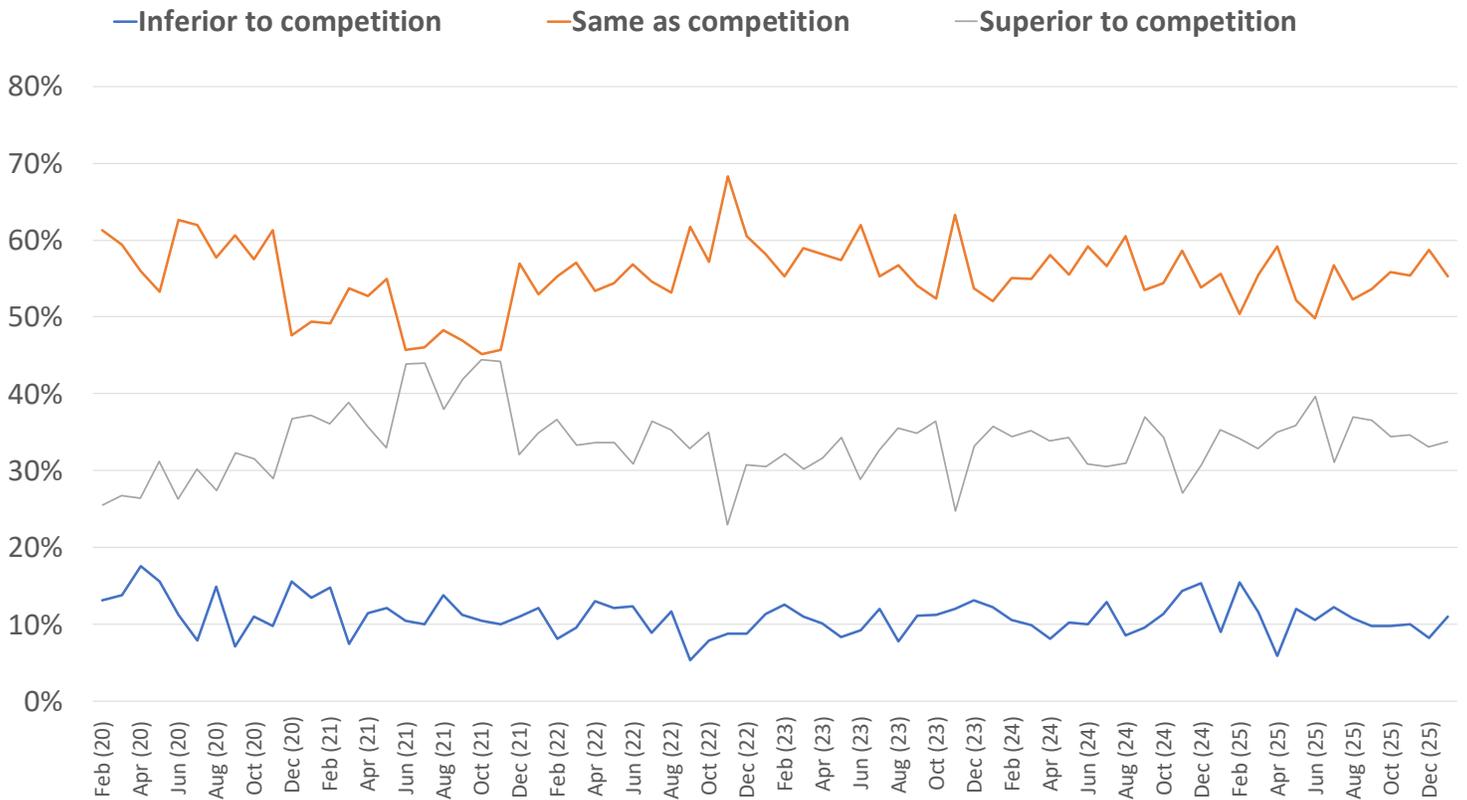
FILA



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

PUMA

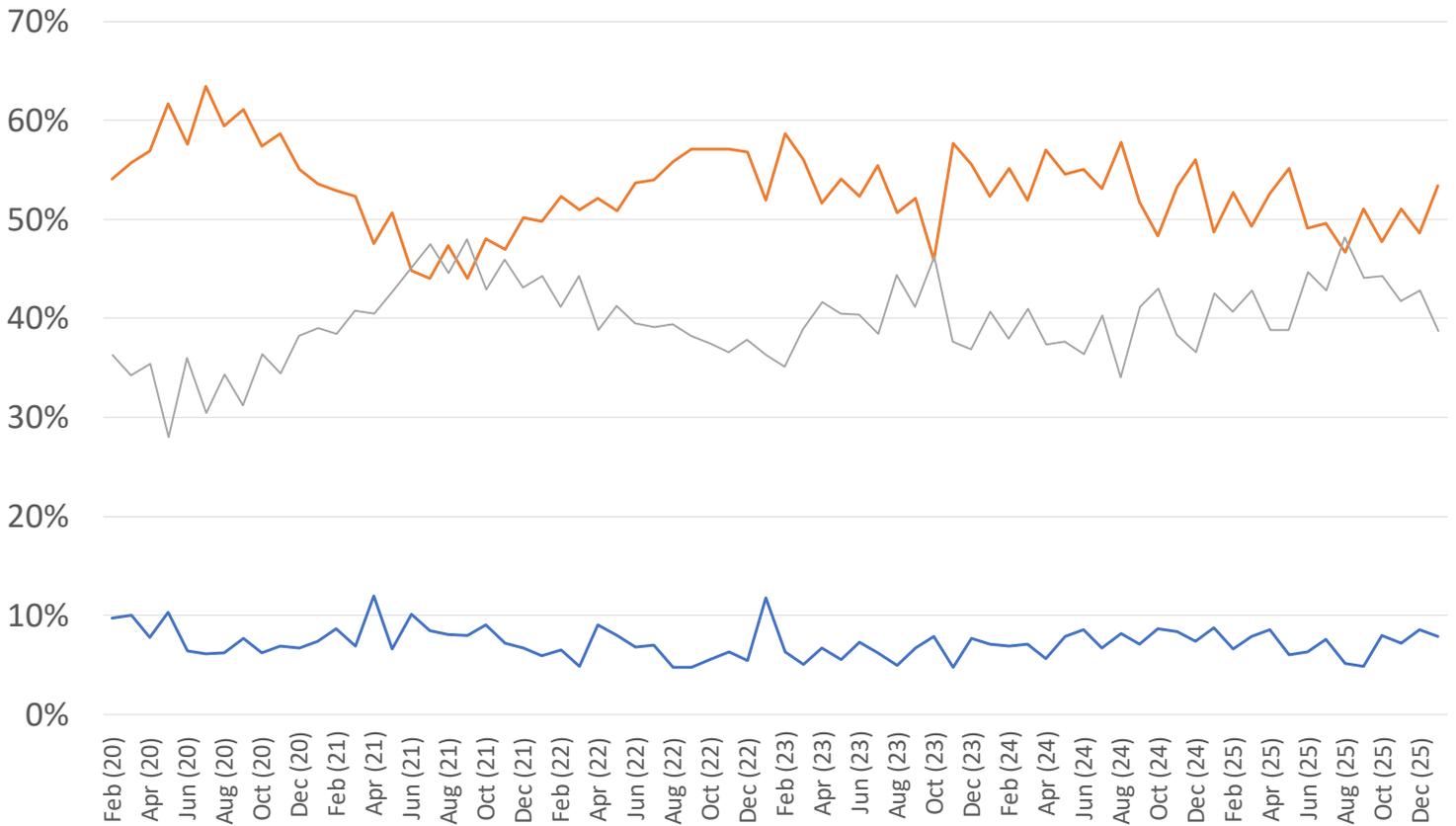


IN YOUR OPINION, HOW DOES THIS BRAND'S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

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

ADIDAS

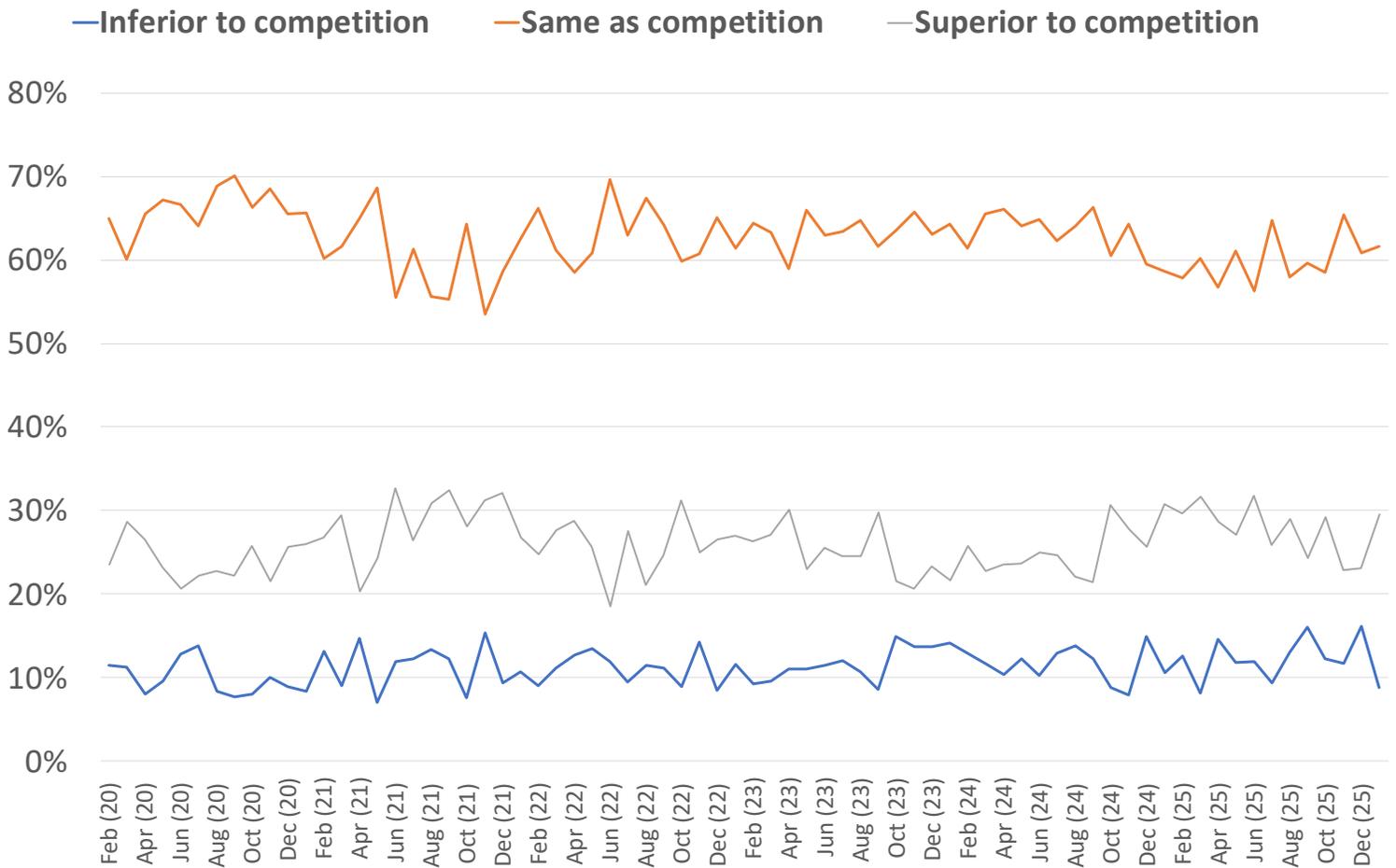
—Inferior to competition —Same as competition —Superior to competition



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

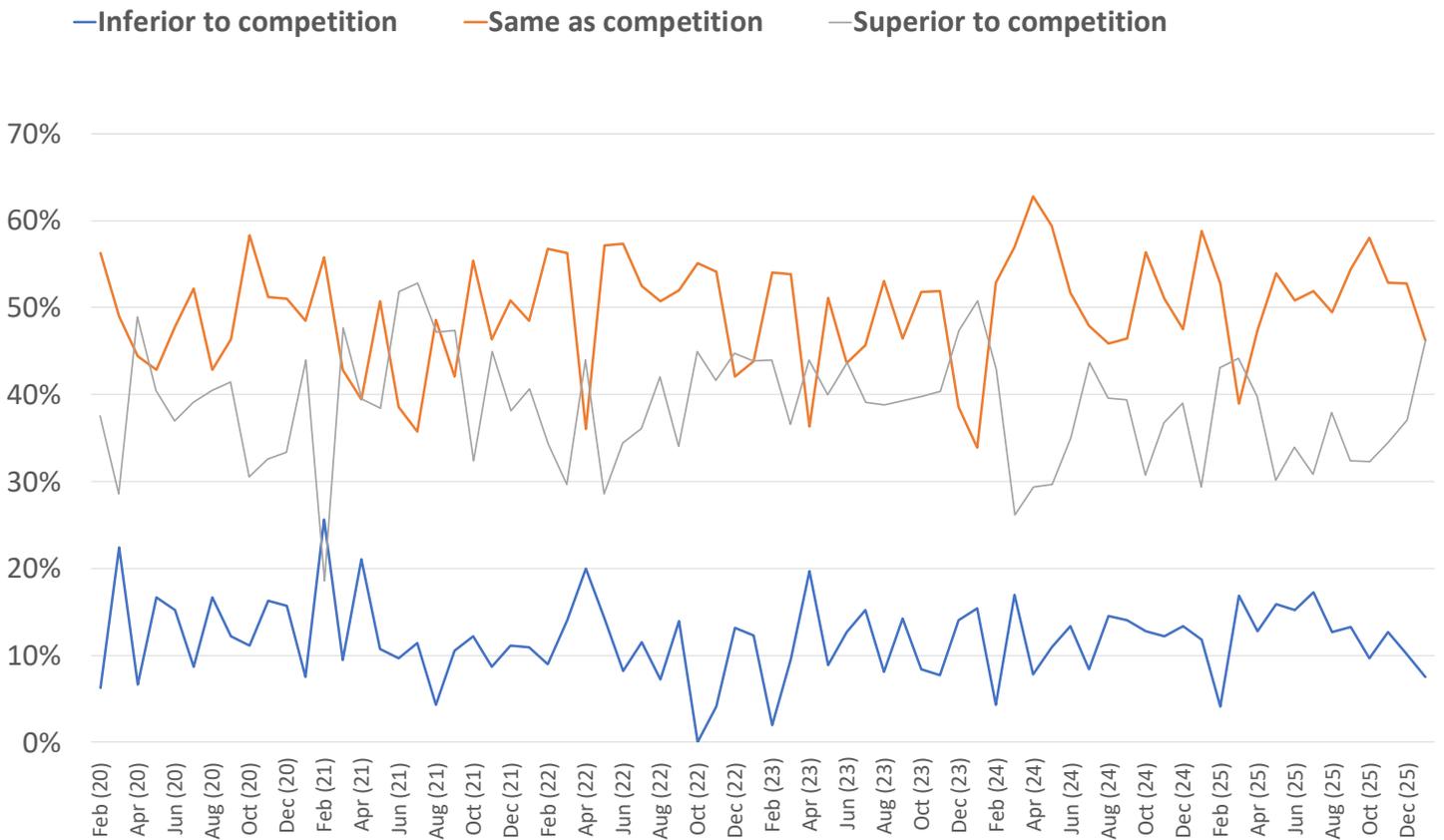
CHAMPION



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

