

BESPOKE SURVEYS

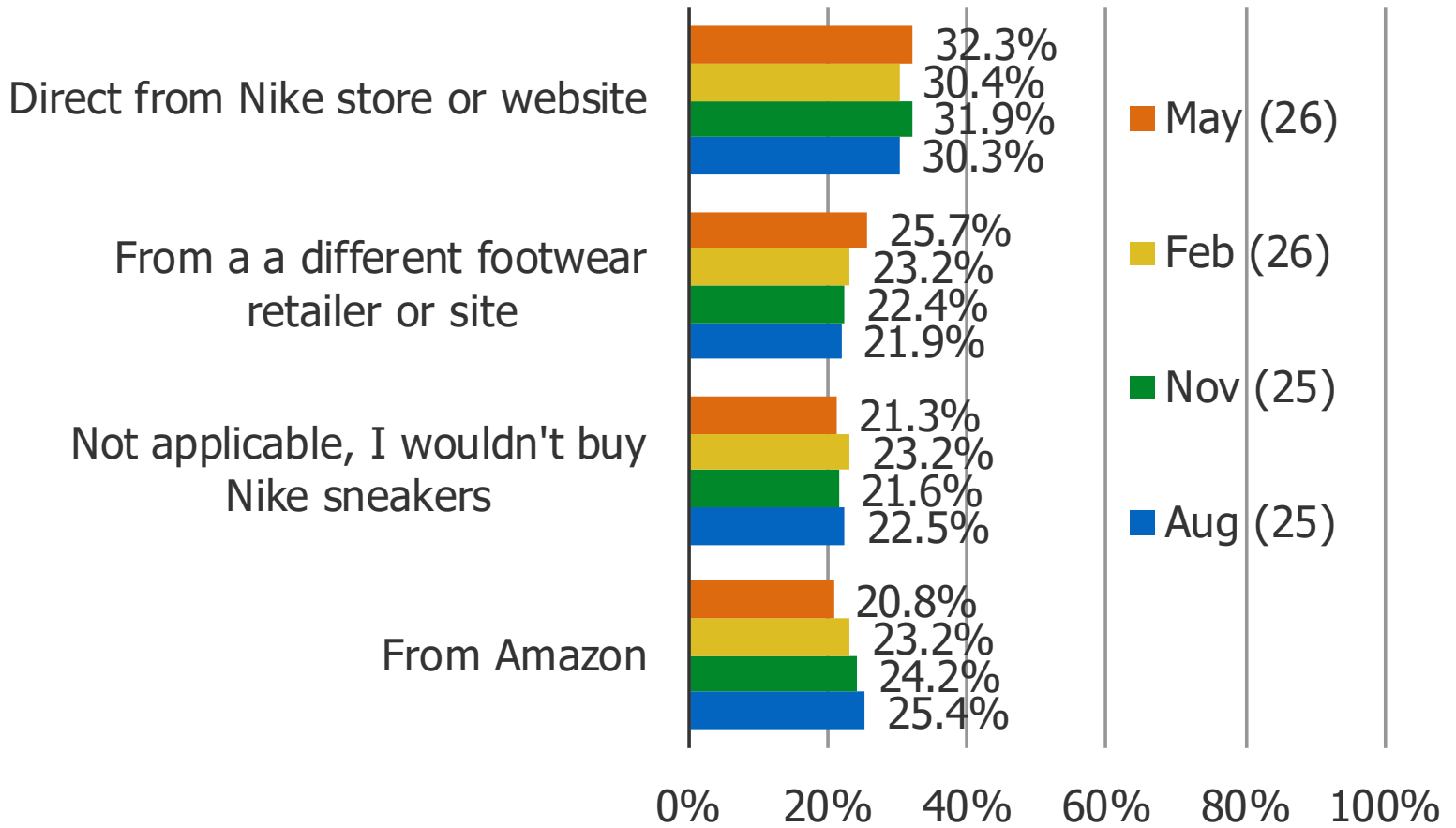
Footwear, Vol 40

1,000+ Respondents Per Quarter

NEW QUESTIONS

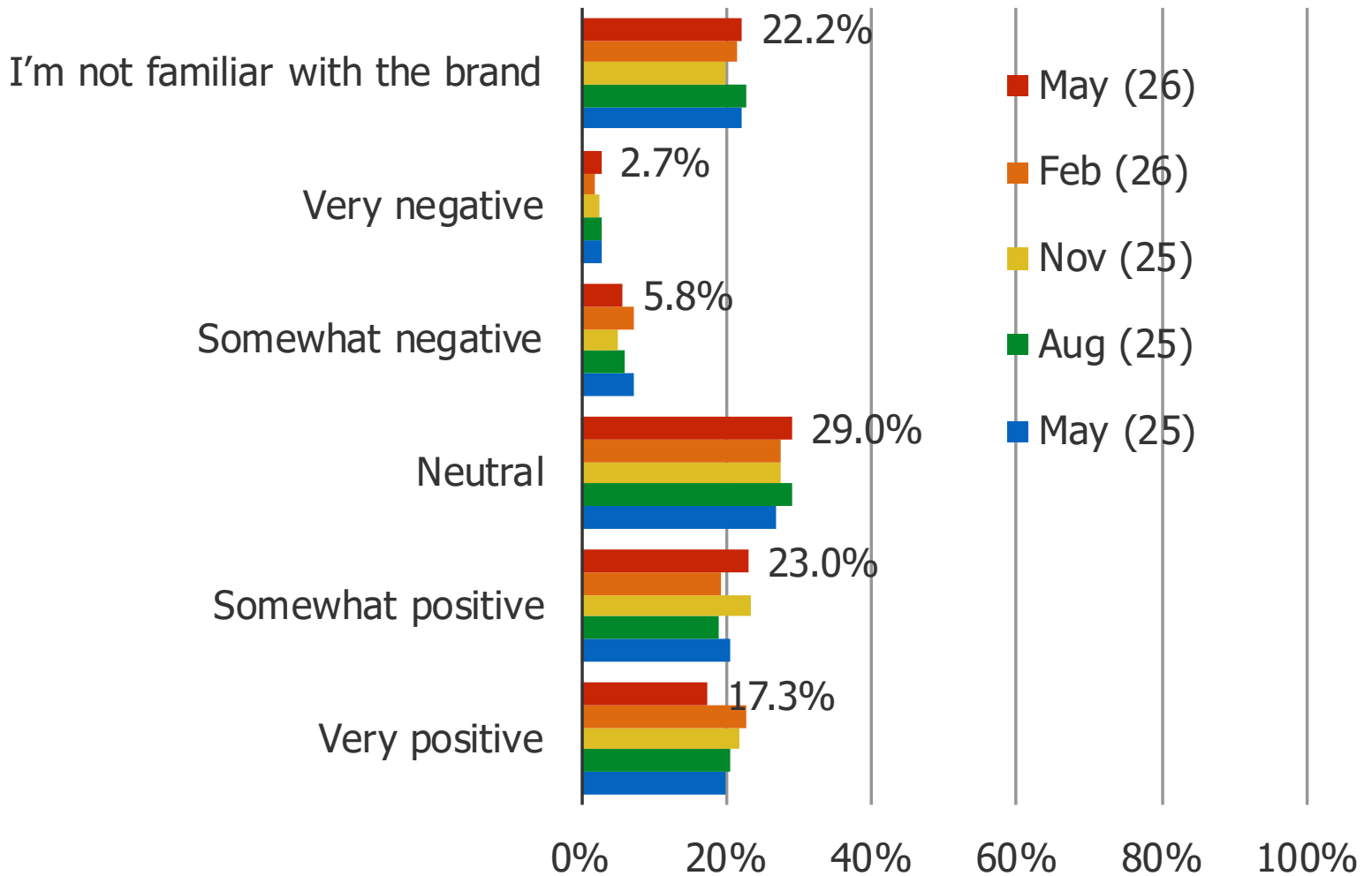
IF YOU WERE BUYING A PAIR OF NIKE SNEAKERS TODAY, WHERE WOULD YOU PREFER TO GET THEM?

Posed to all respondents



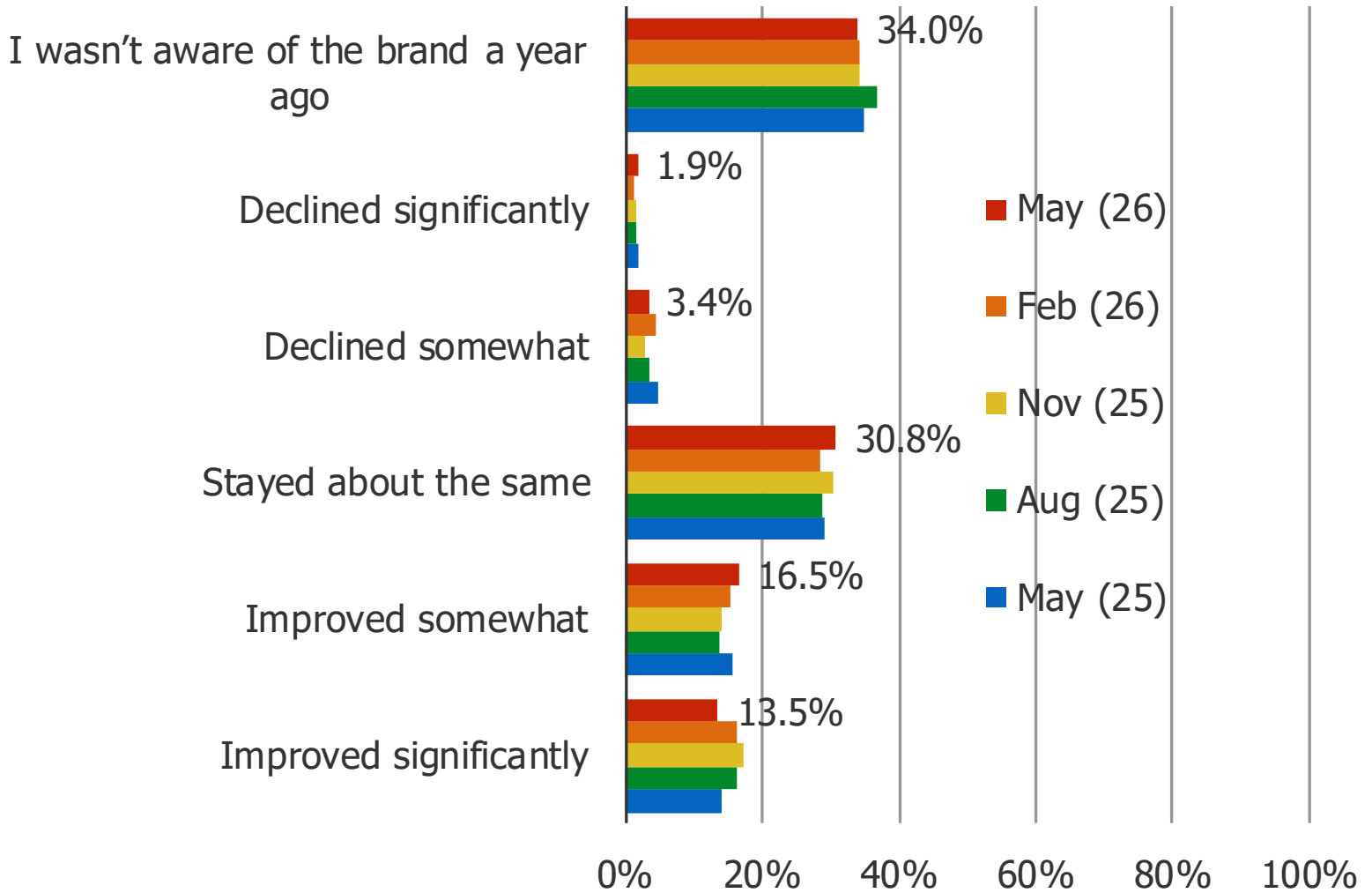
HOW WOULD YOU DESCRIBE YOUR OVERALL PERCEPTION OF THE ON (ON CLOUD) BRAND TODAY?
EXAMPLES OF THEIR SHOES PICTURED IN THE SURVEY

Posed to all respondents



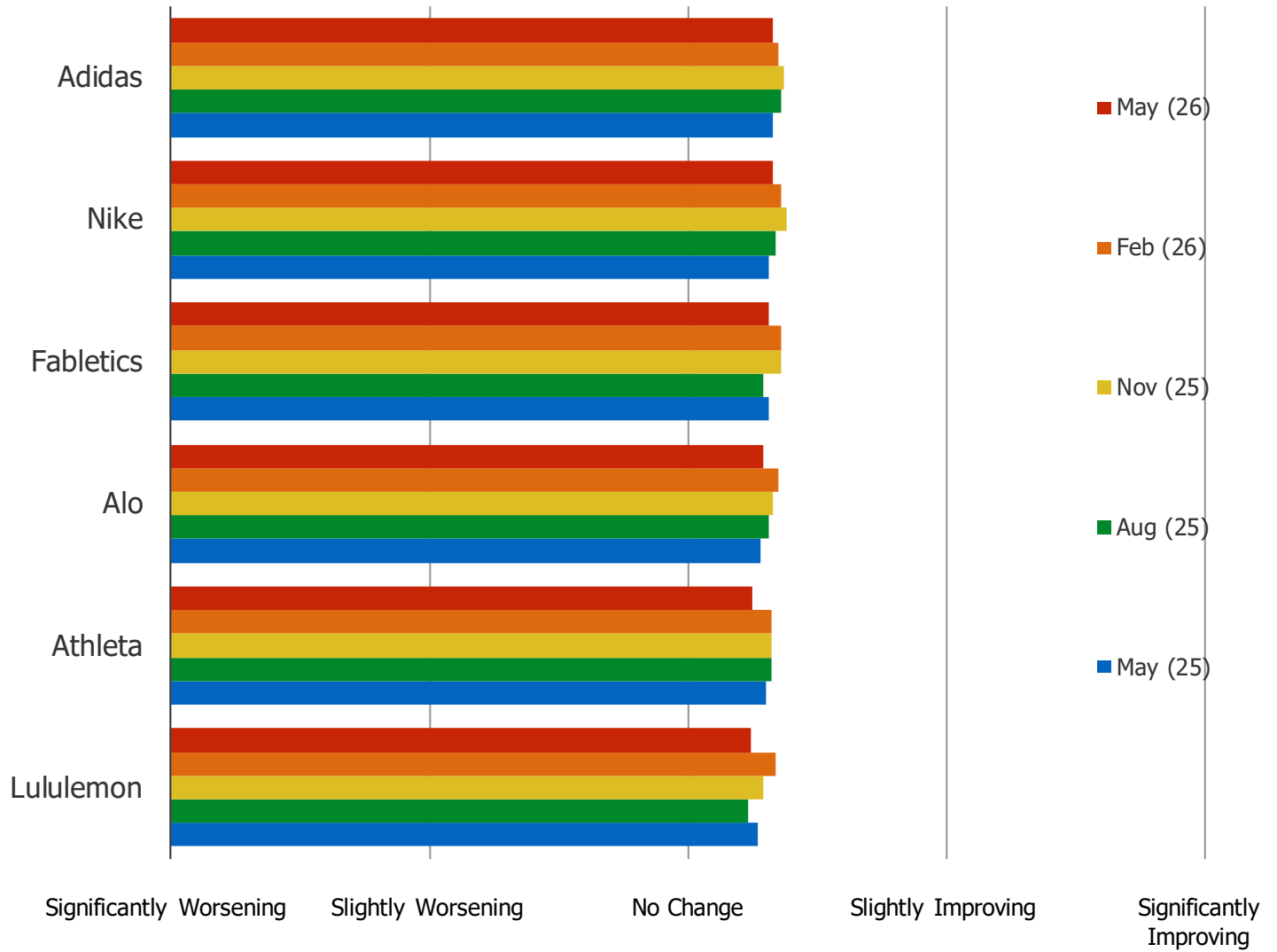
HOW HAS YOUR PERCEPTION OF ON (ON CLOUD) CHANGED OVER THE PAST 12 MONTHS?

Posed to all respondents



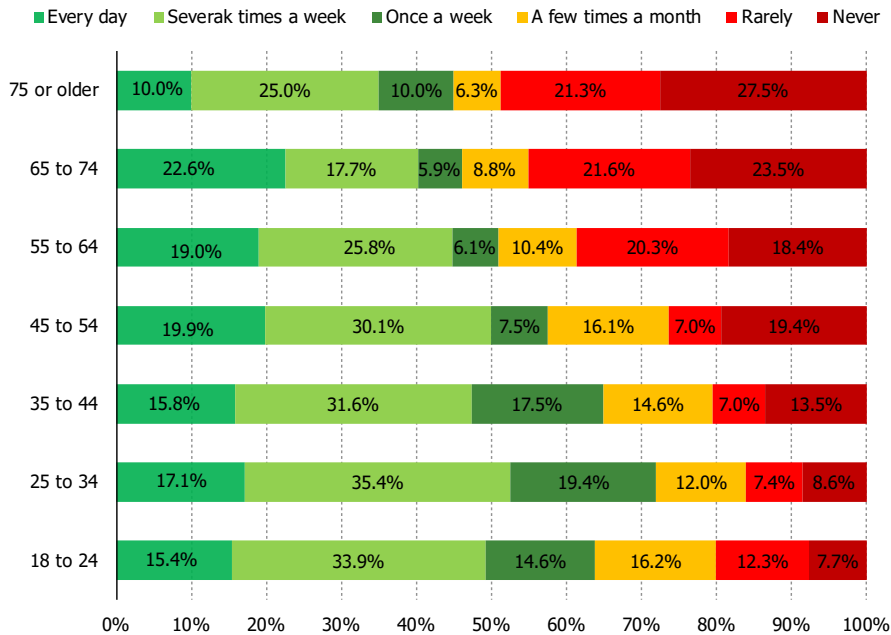
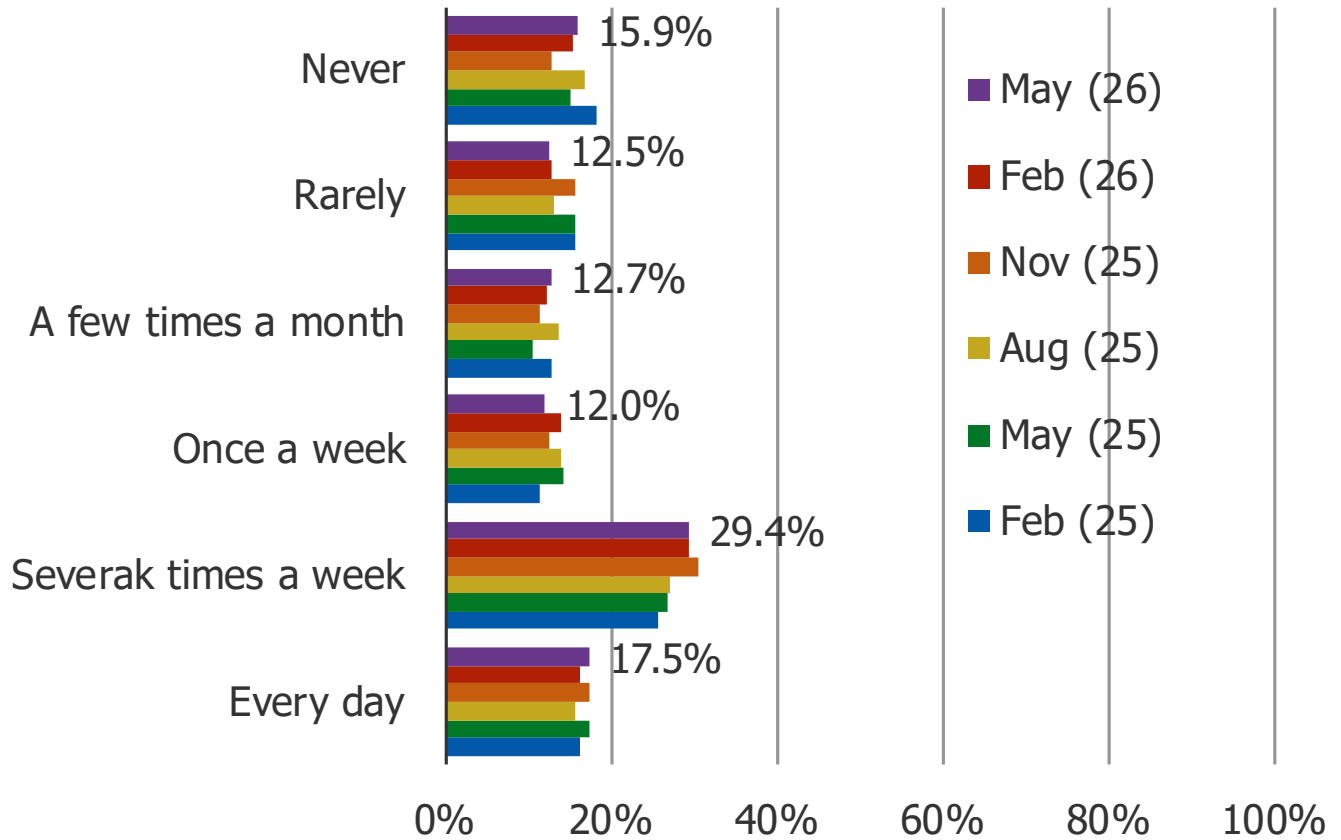
HAS YOUR OPINION OF THE FOLLOWING BRANDS BEEN CHANGING RECENTLY?

Posed to all respondents



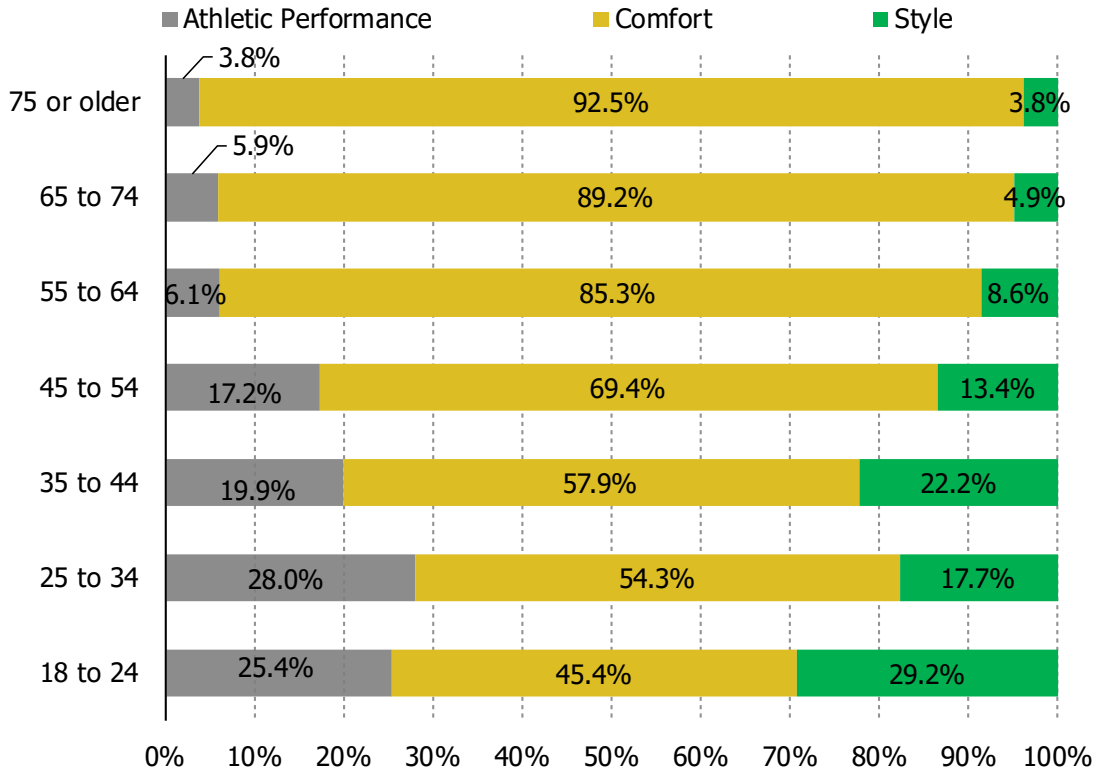
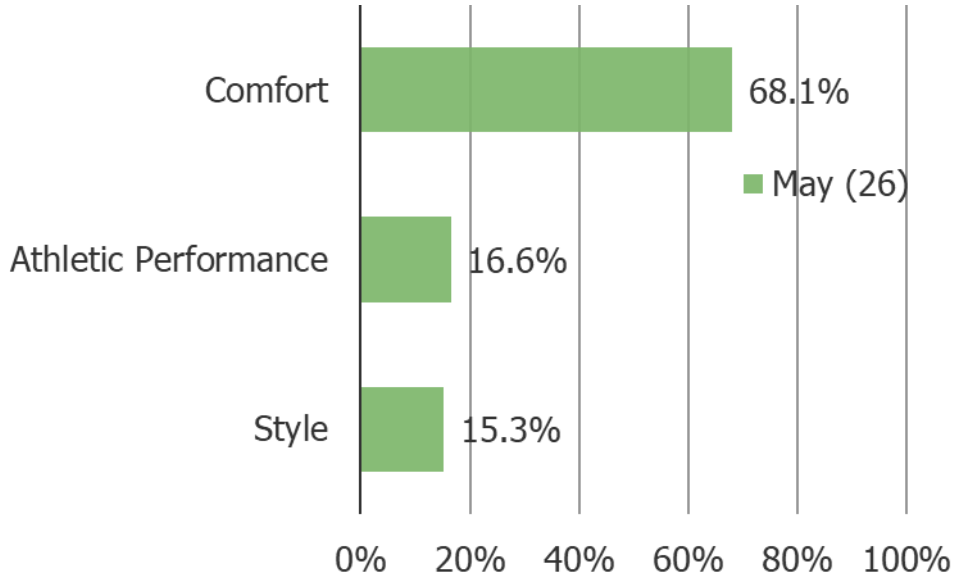
HOW OFTEN DO YOU WEAR ATHLEISURE / ATHLETIC CLOTHING?

Posed to all respondents



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

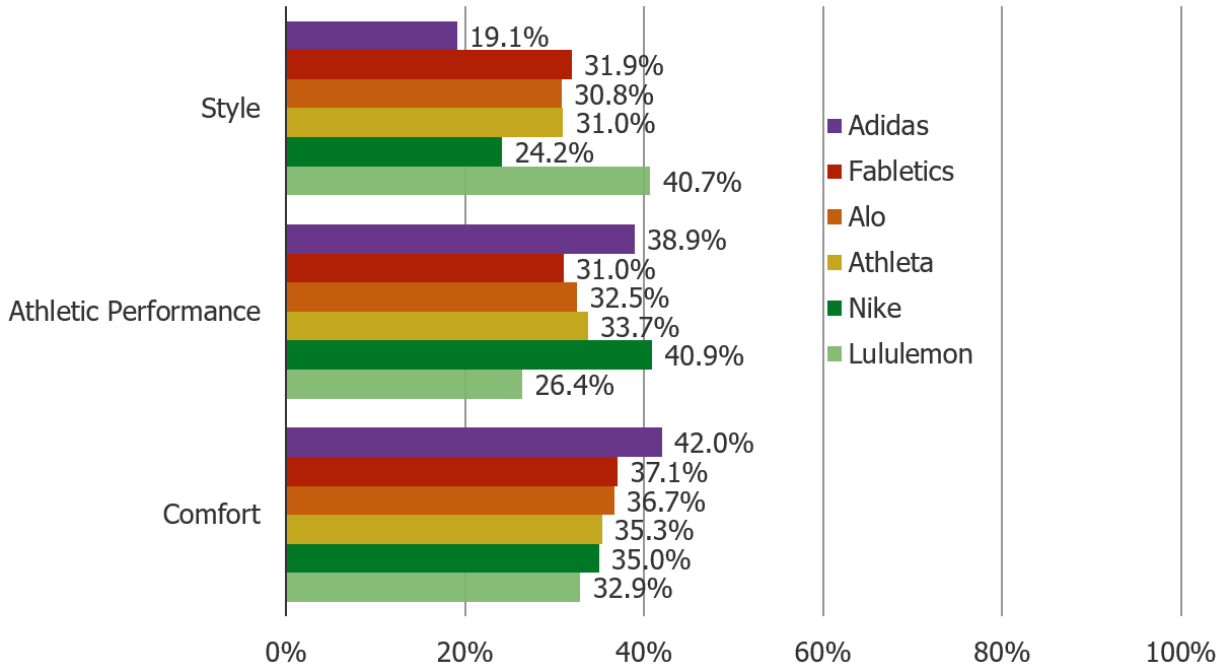
Posed to all respondents



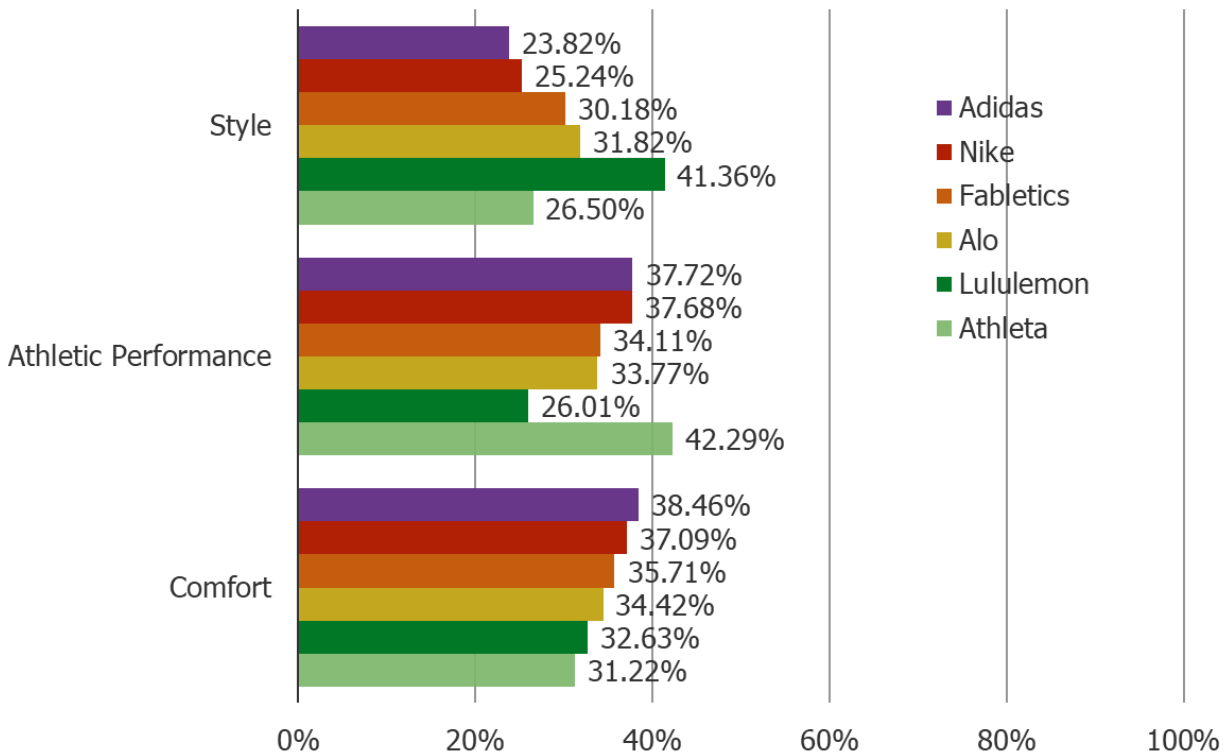
WHEN YOU THINK OF THE FOLLOWING ATHLEISURE BRANDS, DO YOU ASSOCIATE THEIR CLOTHES MORE WITH...

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

May 2026

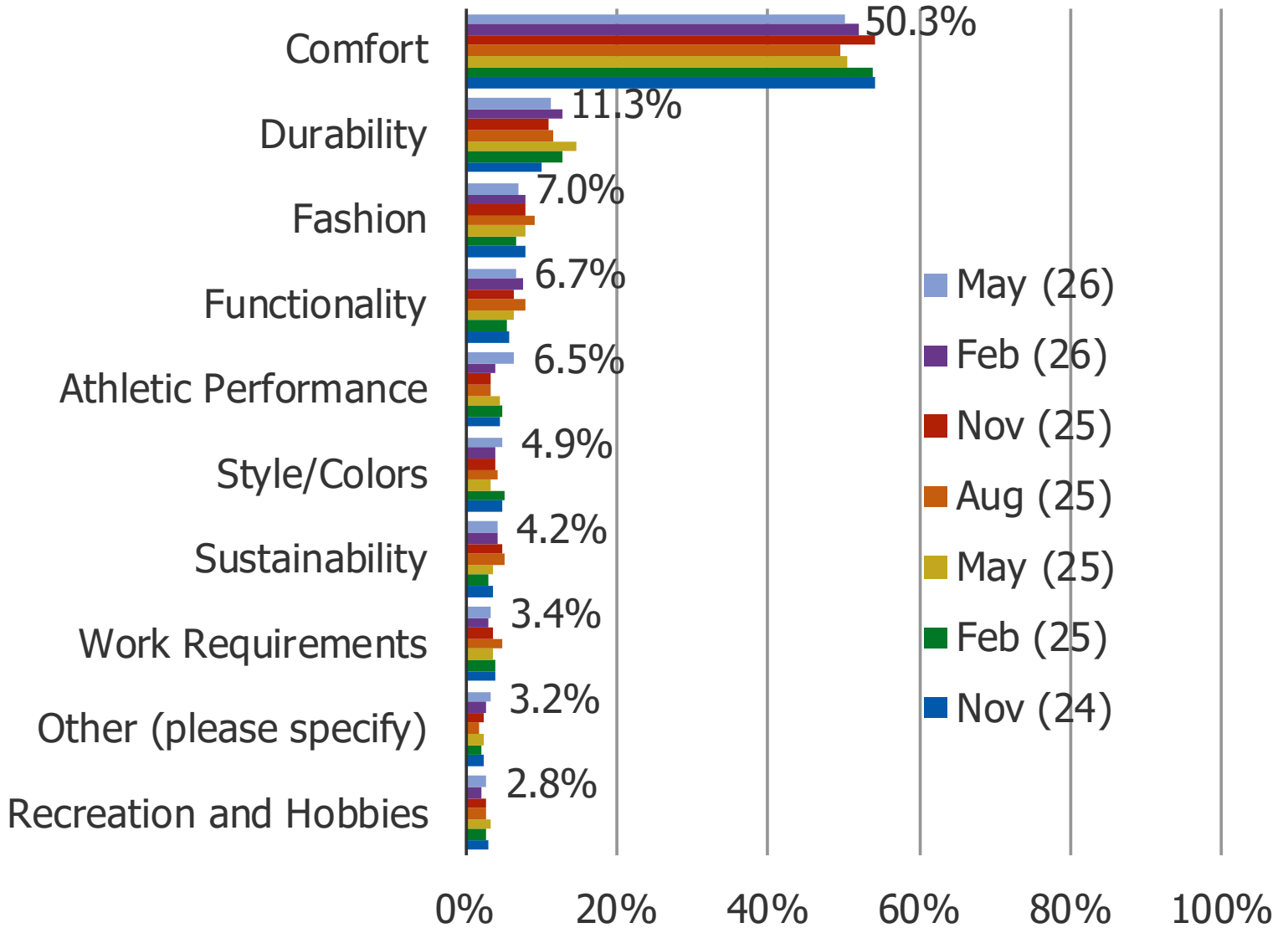


February 2026



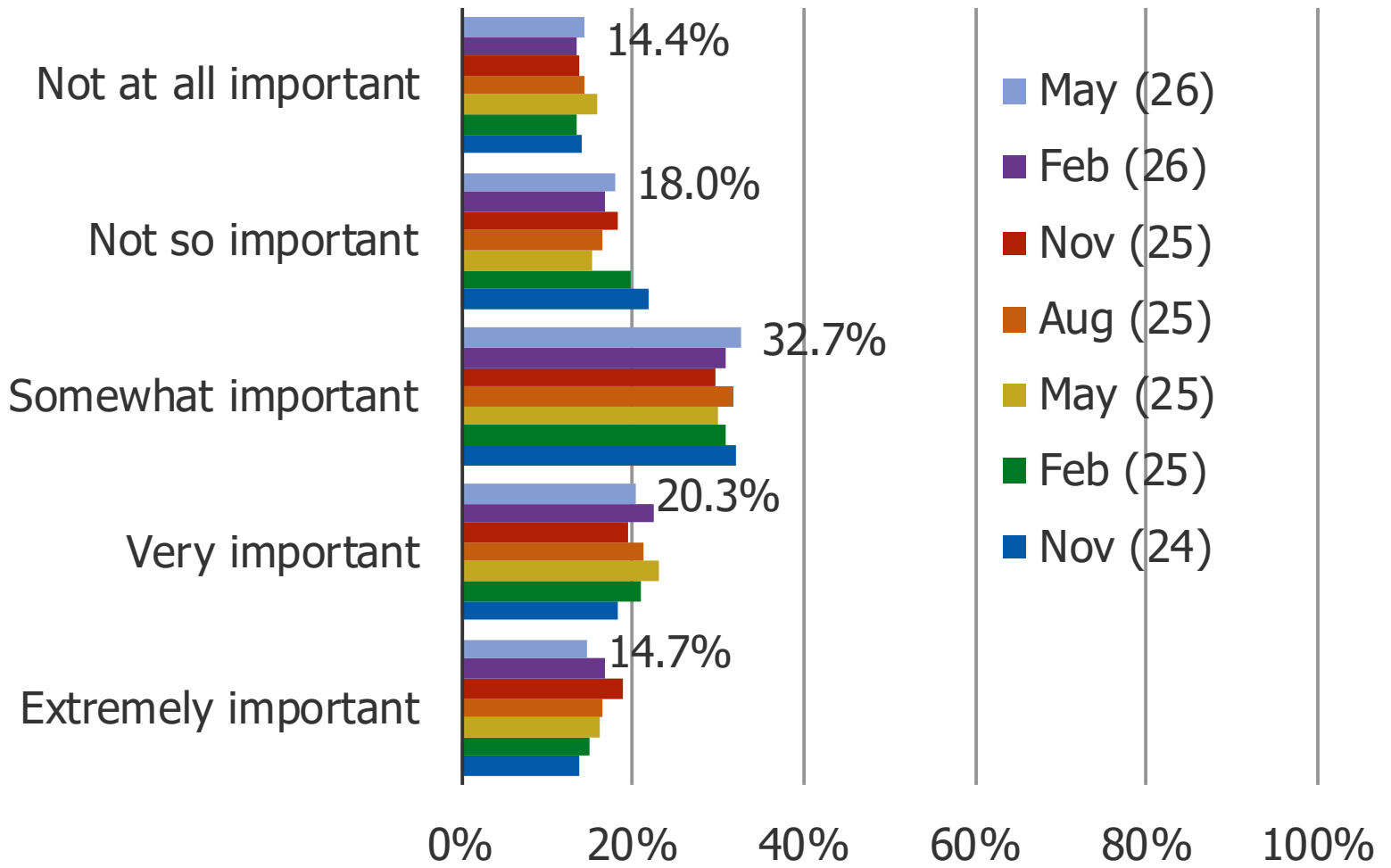
WHAT IS TYPICALLY THE PRIMARY DRIVER FOR FOOTWEAR PURCHASES THAT YOU MAKE?

Posed to all respondents



HOW IMPORTANT IS THE FASHION COMPONENT OF SNEAKERS TO YOU?

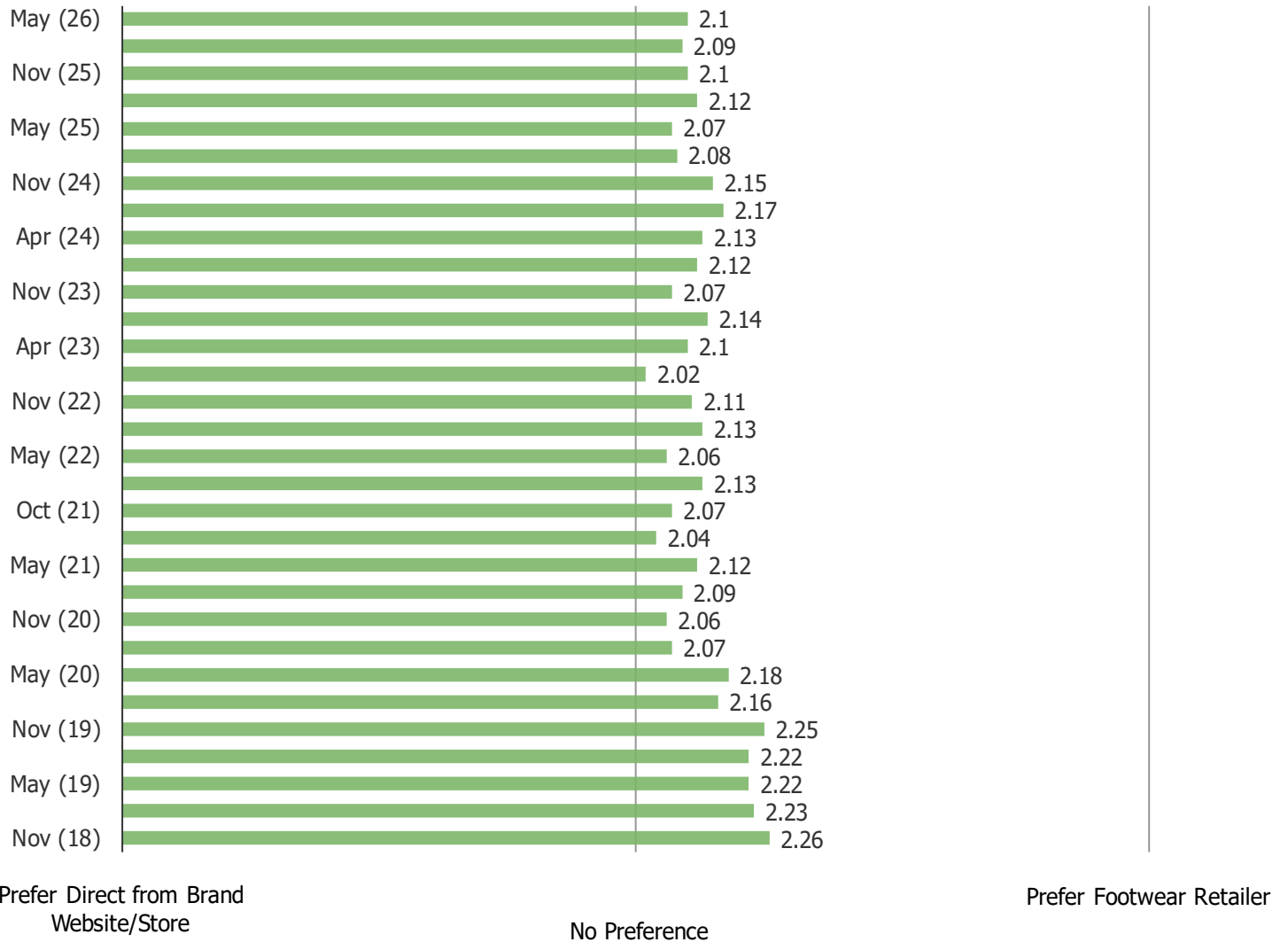
Posed to all respondents



FOOTWEAR PURCHASE PREFERENCES

WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

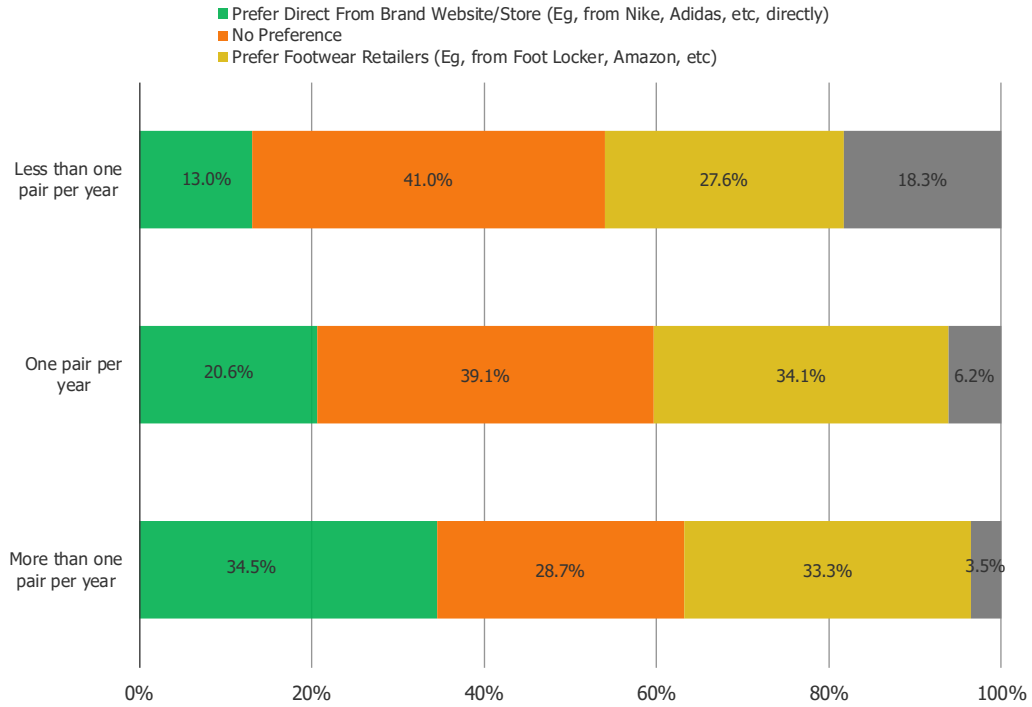
Posed to all respondents



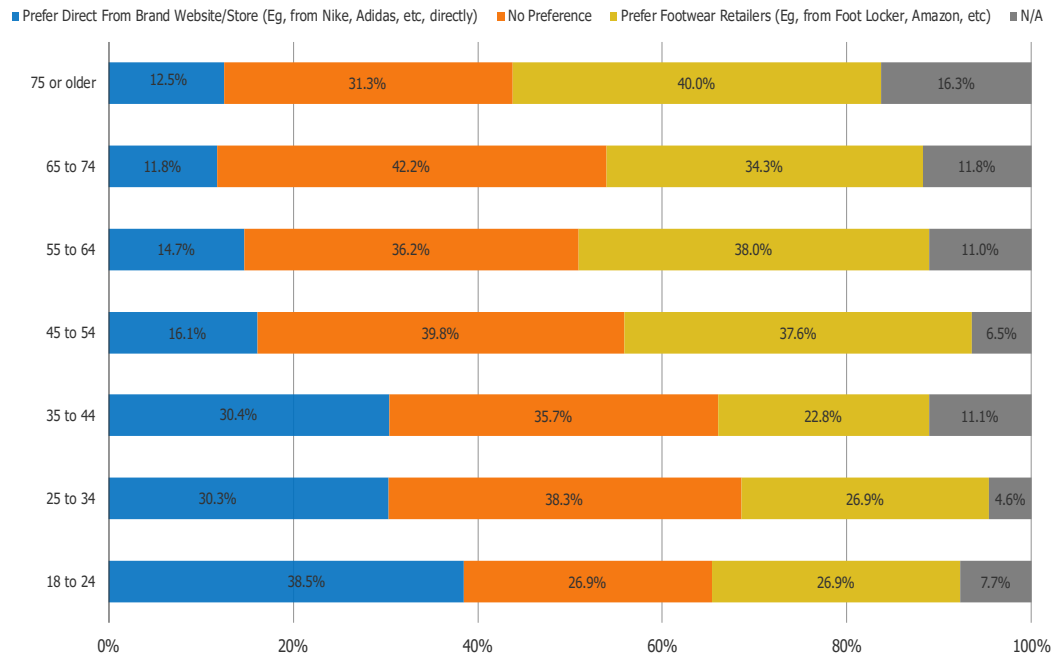
WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

Cross-Tab Analysis

By How Often Consumers Buy Footwear

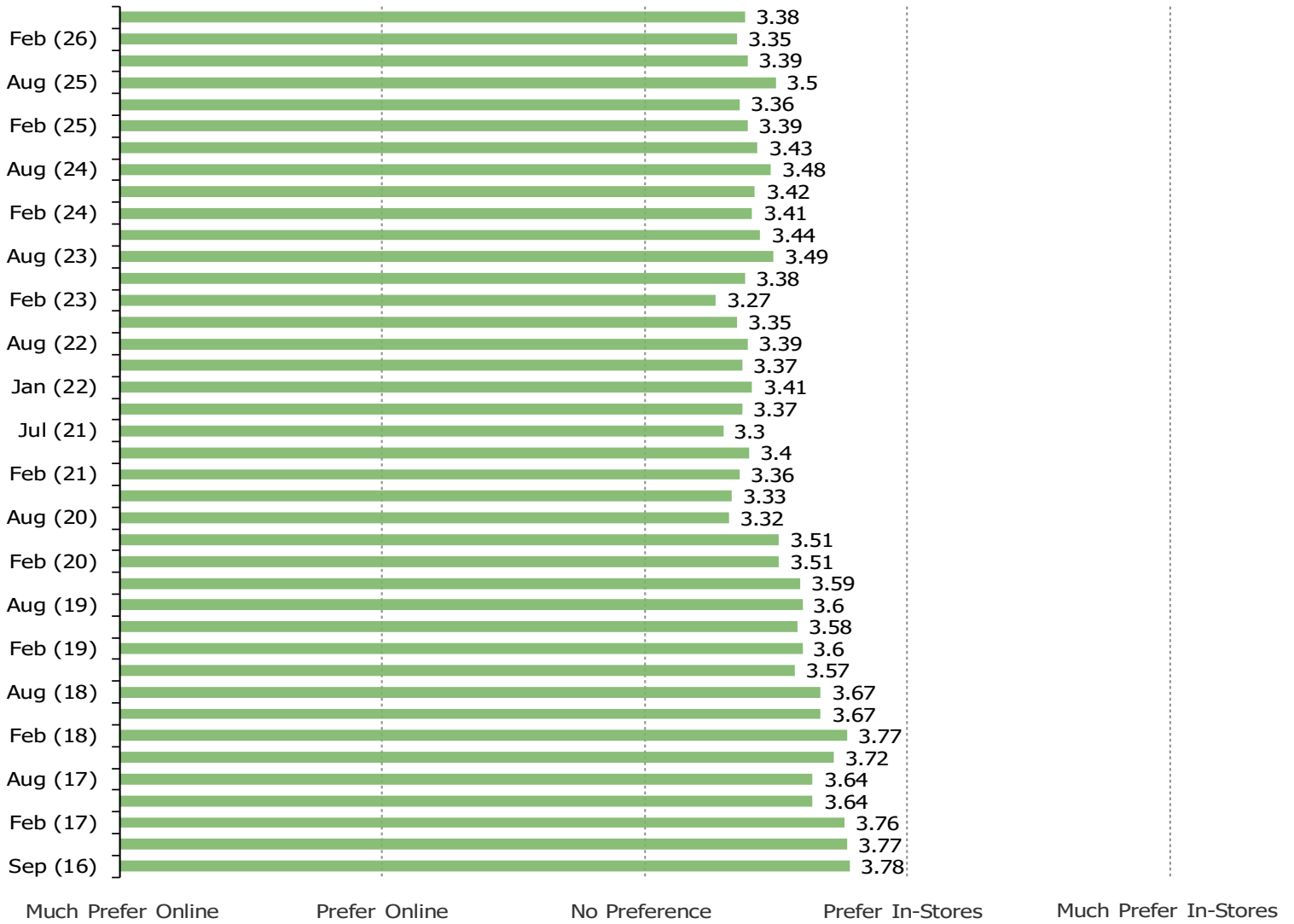


By Age



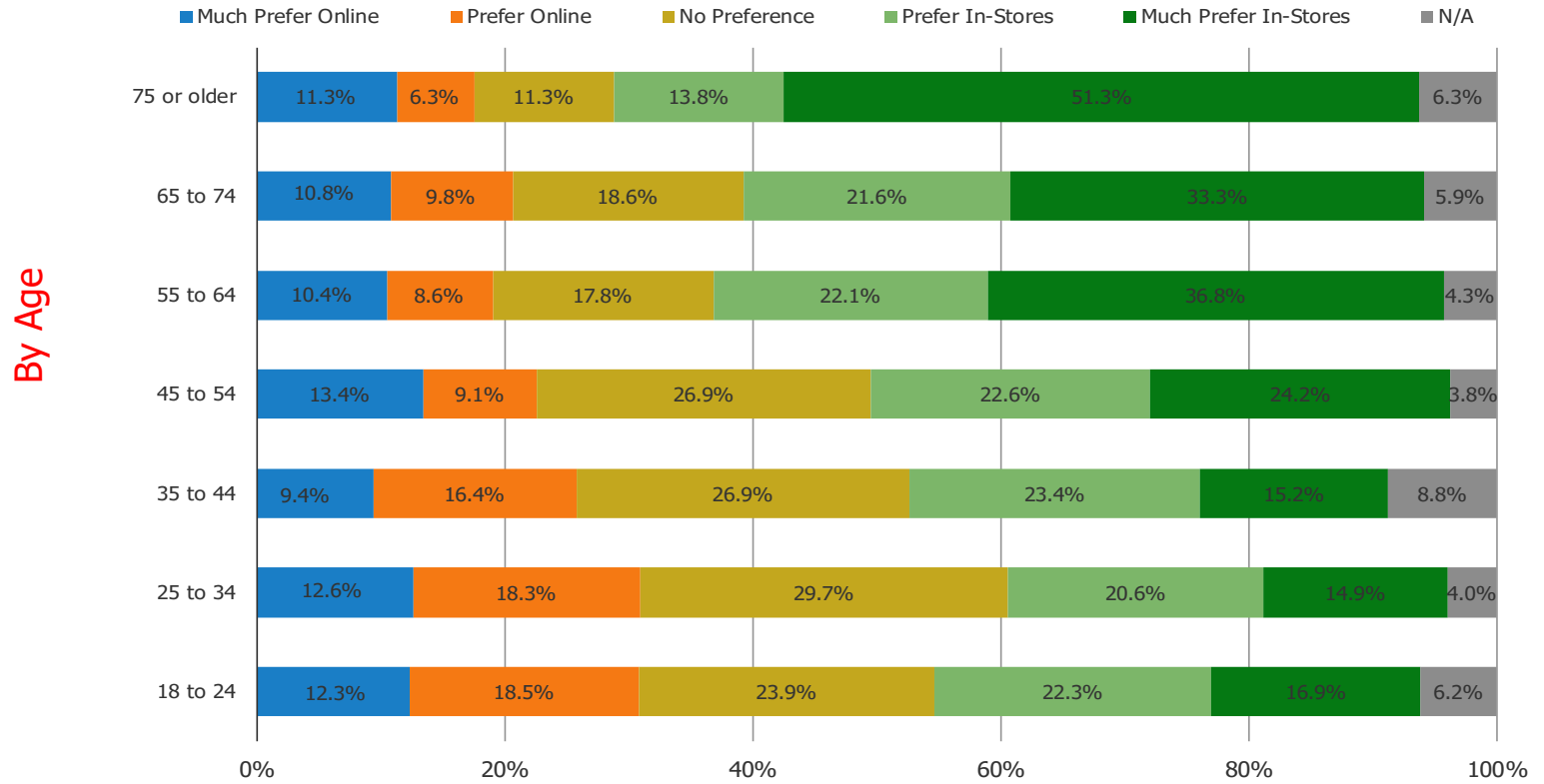
WHERE DO YOU PREFER TO BUY SNEAKERS?

Posed to all respondents



WHERE DO YOU PREFER TO BUY SNEAKERS?

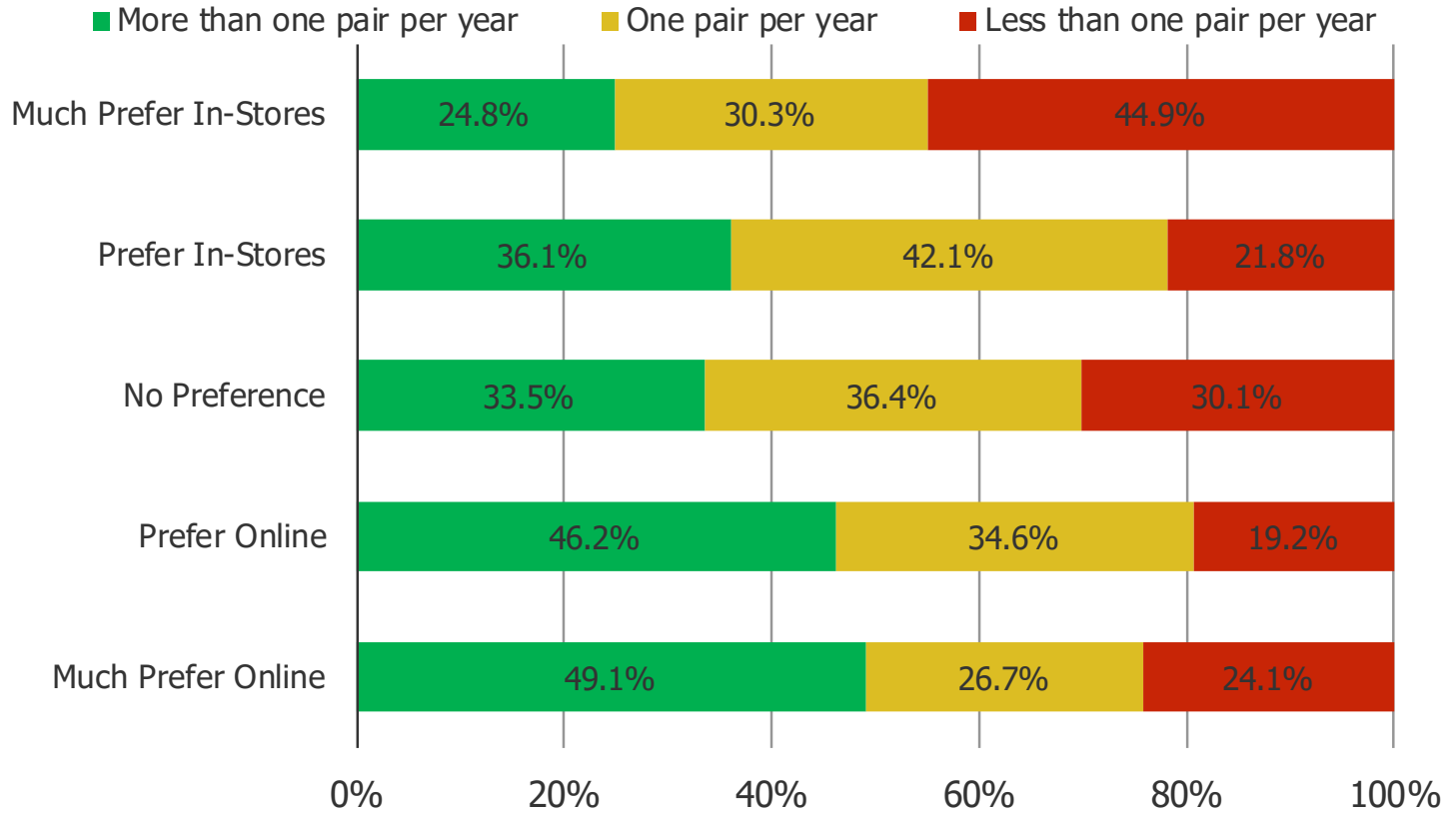
Cross-Tab Analysis



HOW MANY PAIRS OF FOOTWEAR DO YOU BUY PER YEAR?

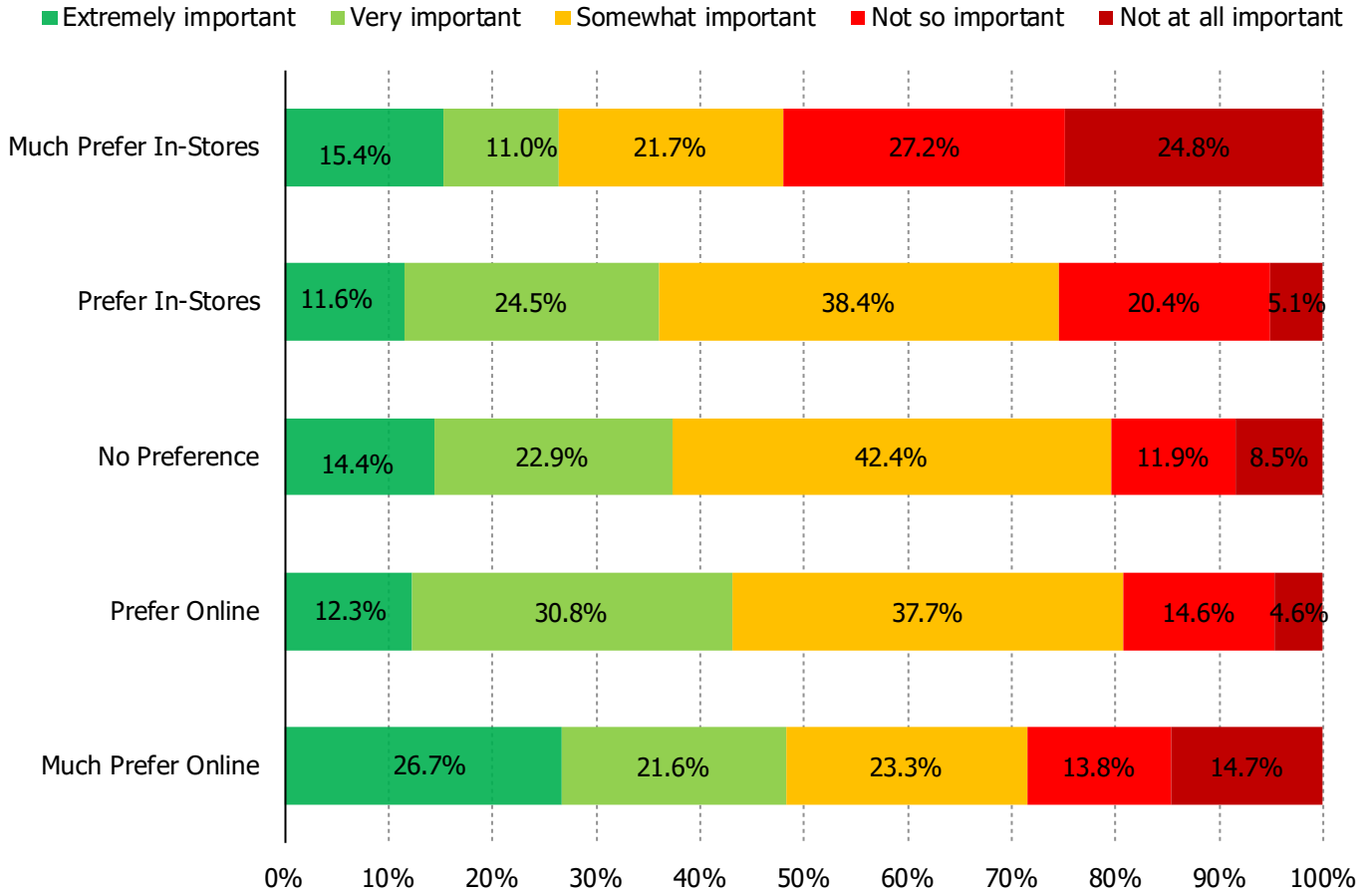
Cross-Tab Analysis

By How Consumers Prefer To Buy Footwear



HOW IMPORTANT IS THE FASHION COMPONENT OF SNEAKERS TO YOU?

Cross-Tab Analysis

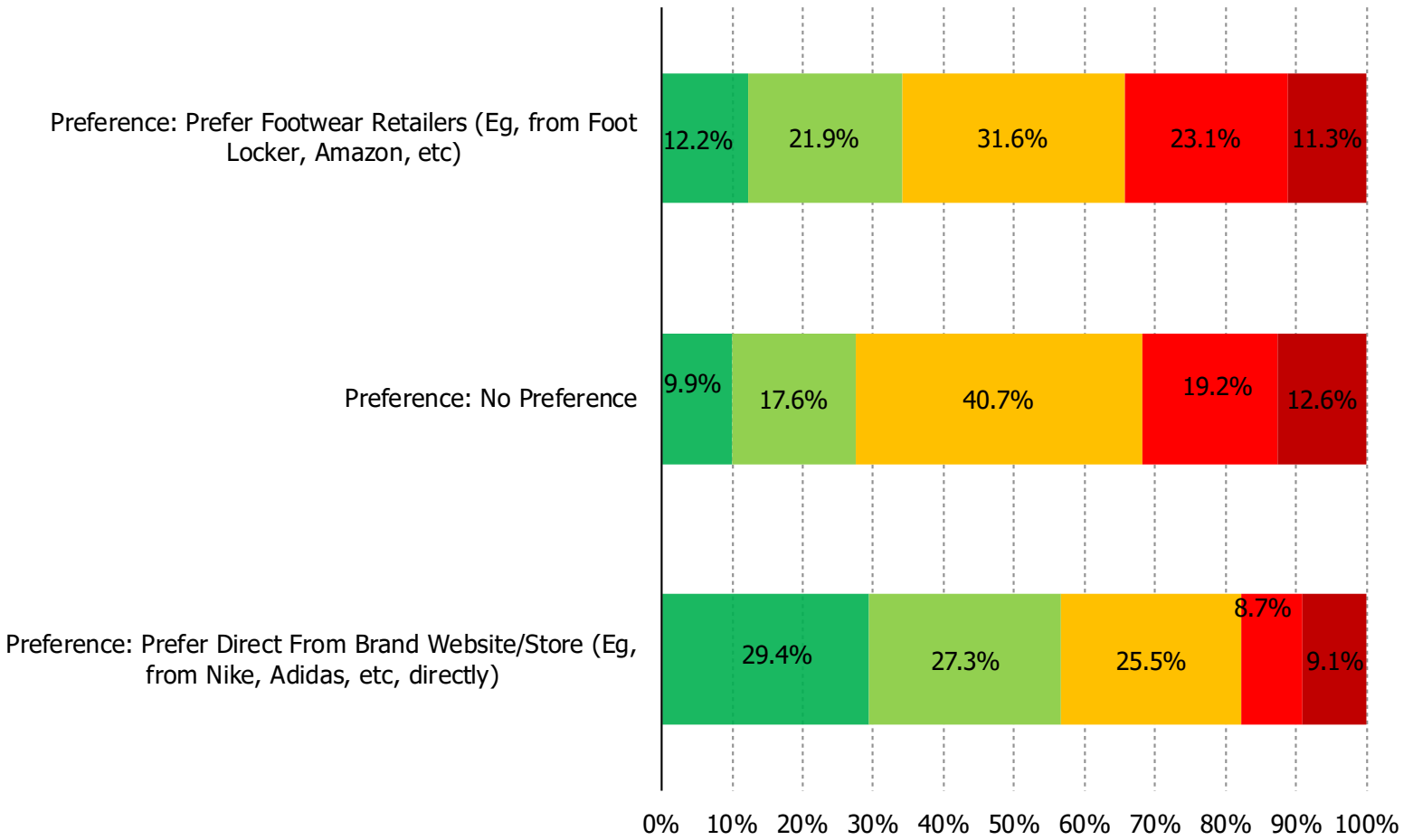


IE – respondents who much prefer buying footwear online are more likely to say the fashion component of sneakers is important to them...

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

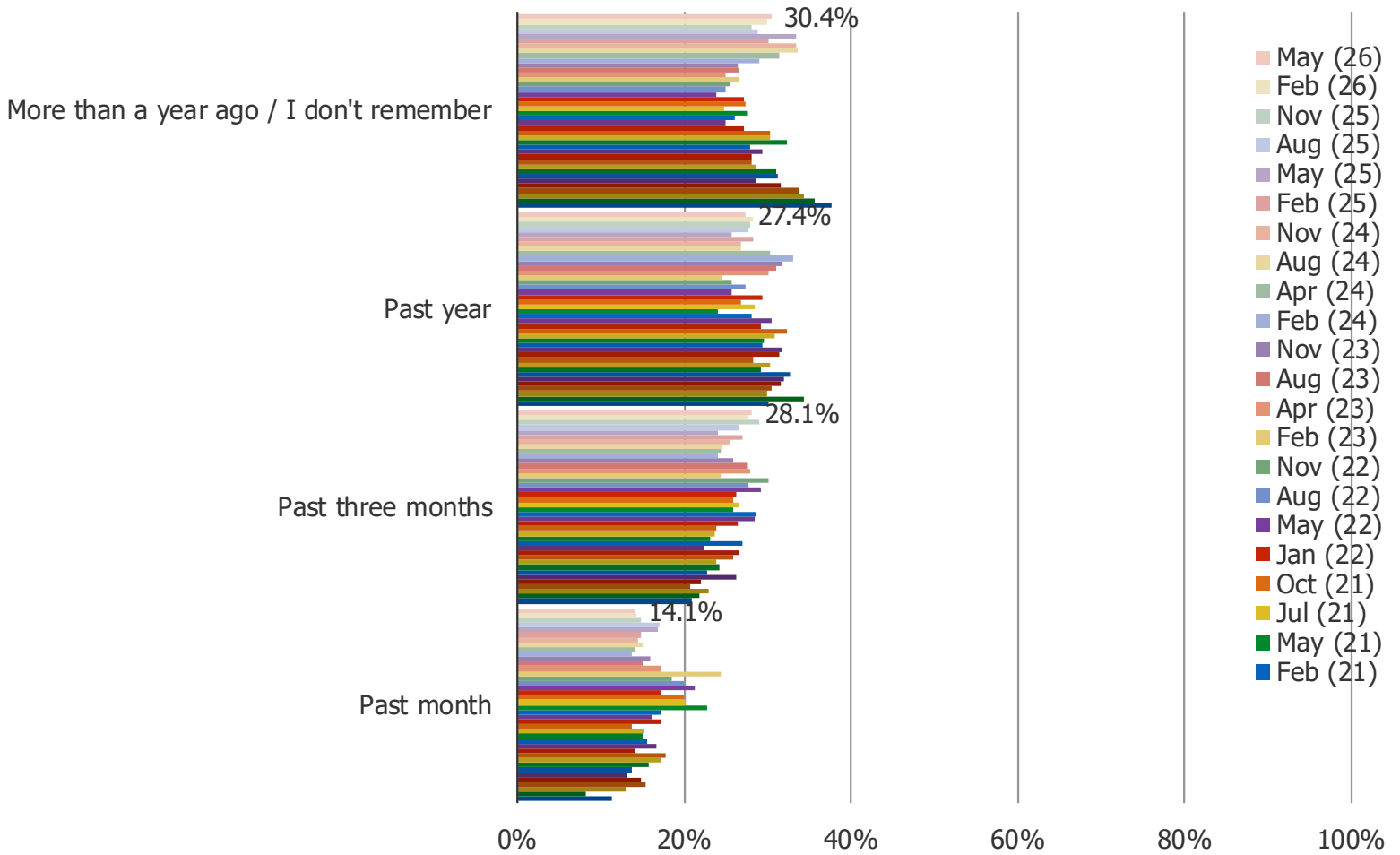


IE – respondents who prefer buying direct from the brand are more likely to say the fashion component of sneakers is important to them...

SNEAKER BUYING TRENDS

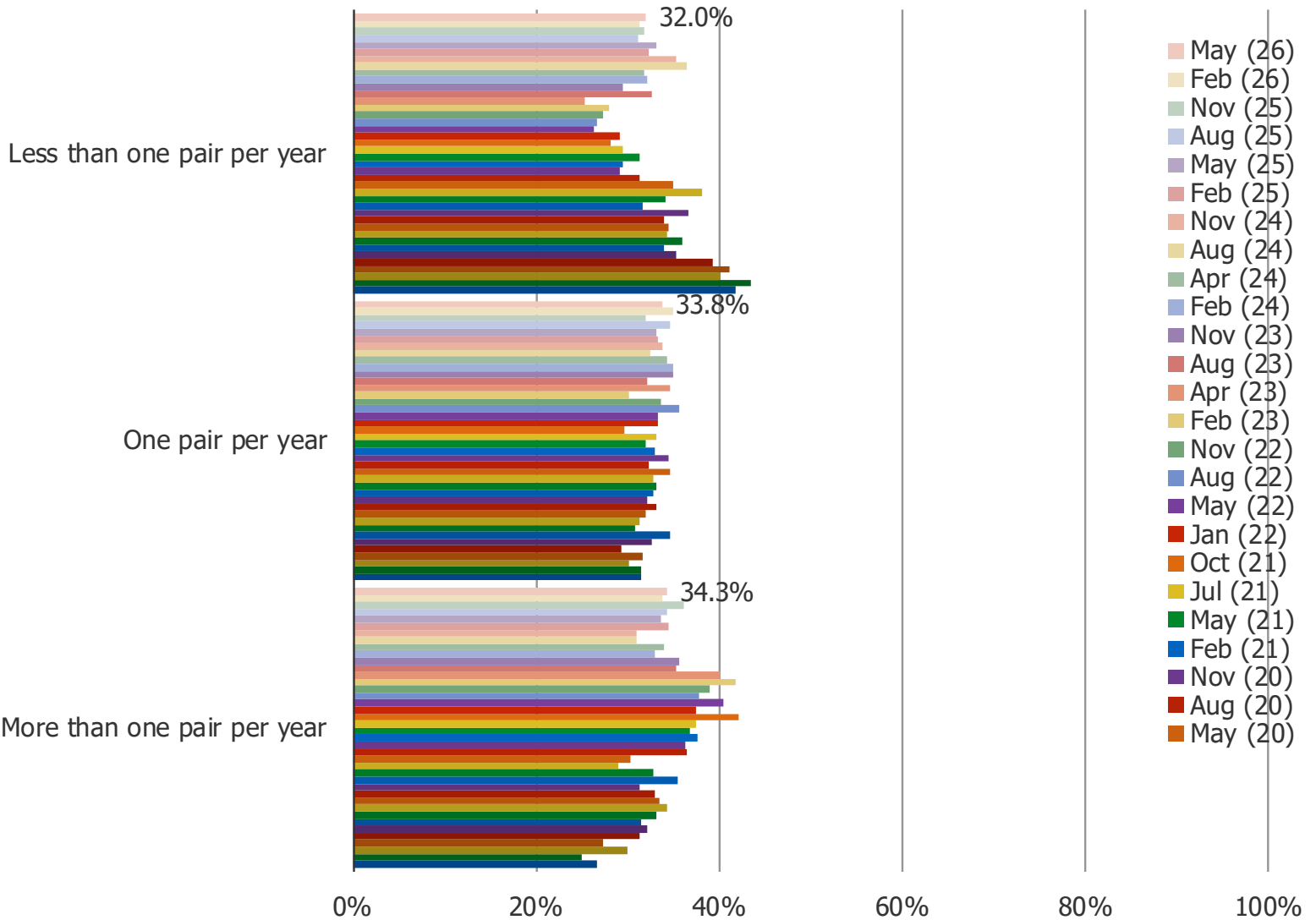
WHEN IS THE LAST TIME YOU BOUGHT A NEW PAIR OF SNEAKERS?

Posed to all respondents



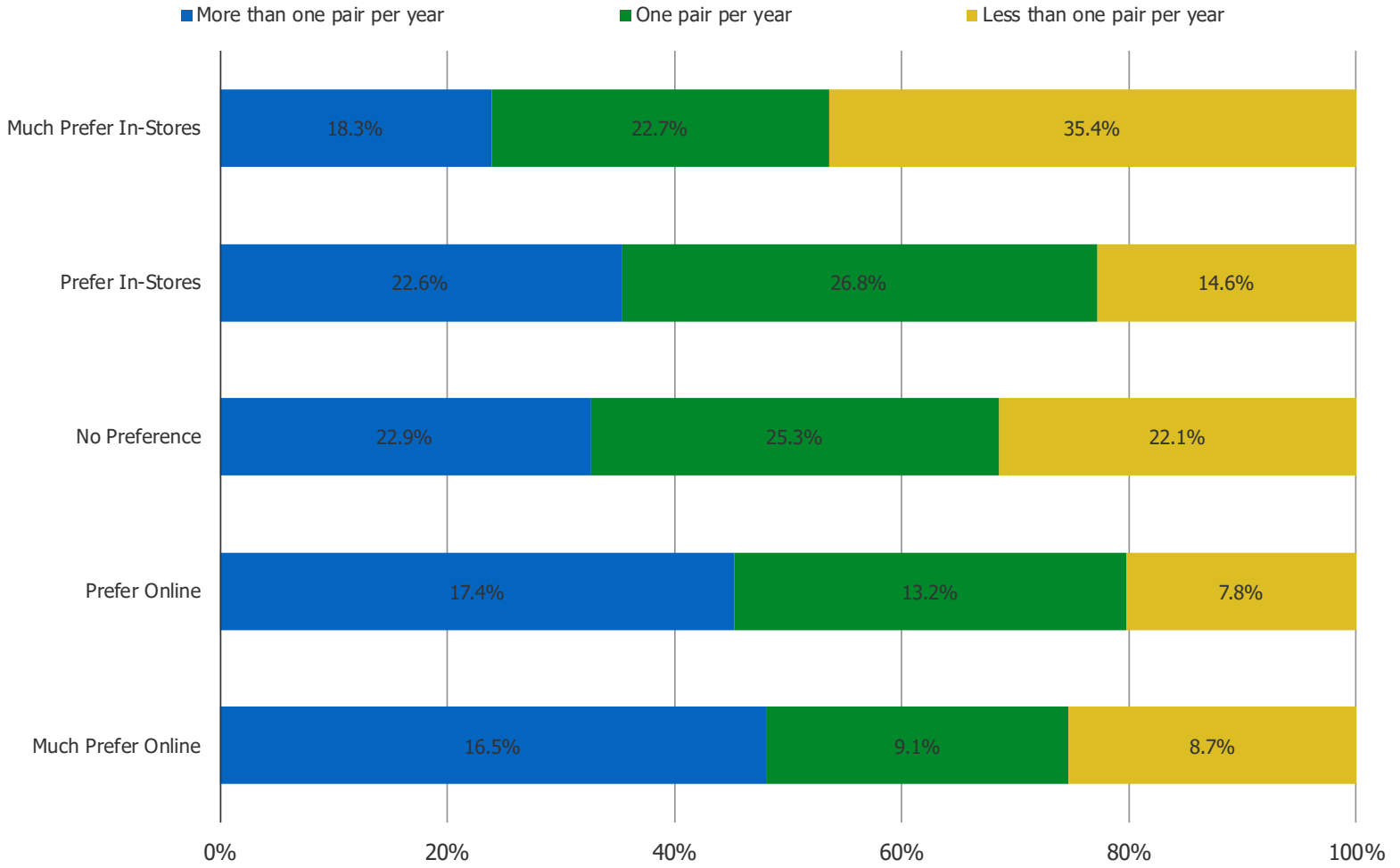
HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

Posed to all respondents



HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

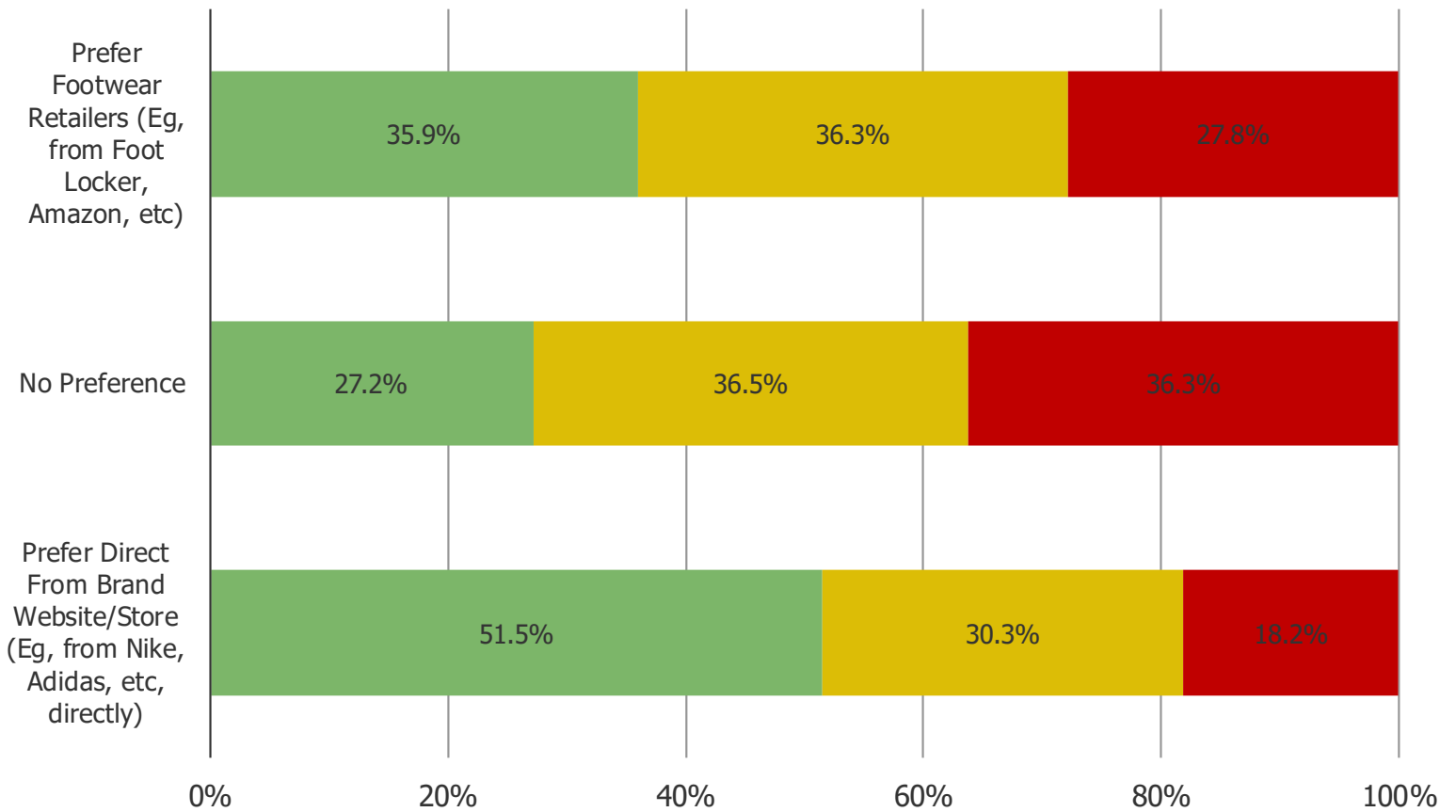
Posed to all respondents – Cross-tabbed by if they prefer to buy online vs. in-stores.



HOW OFTEN DO YOU BUY A NEW PAIR OF SNEAKERS?

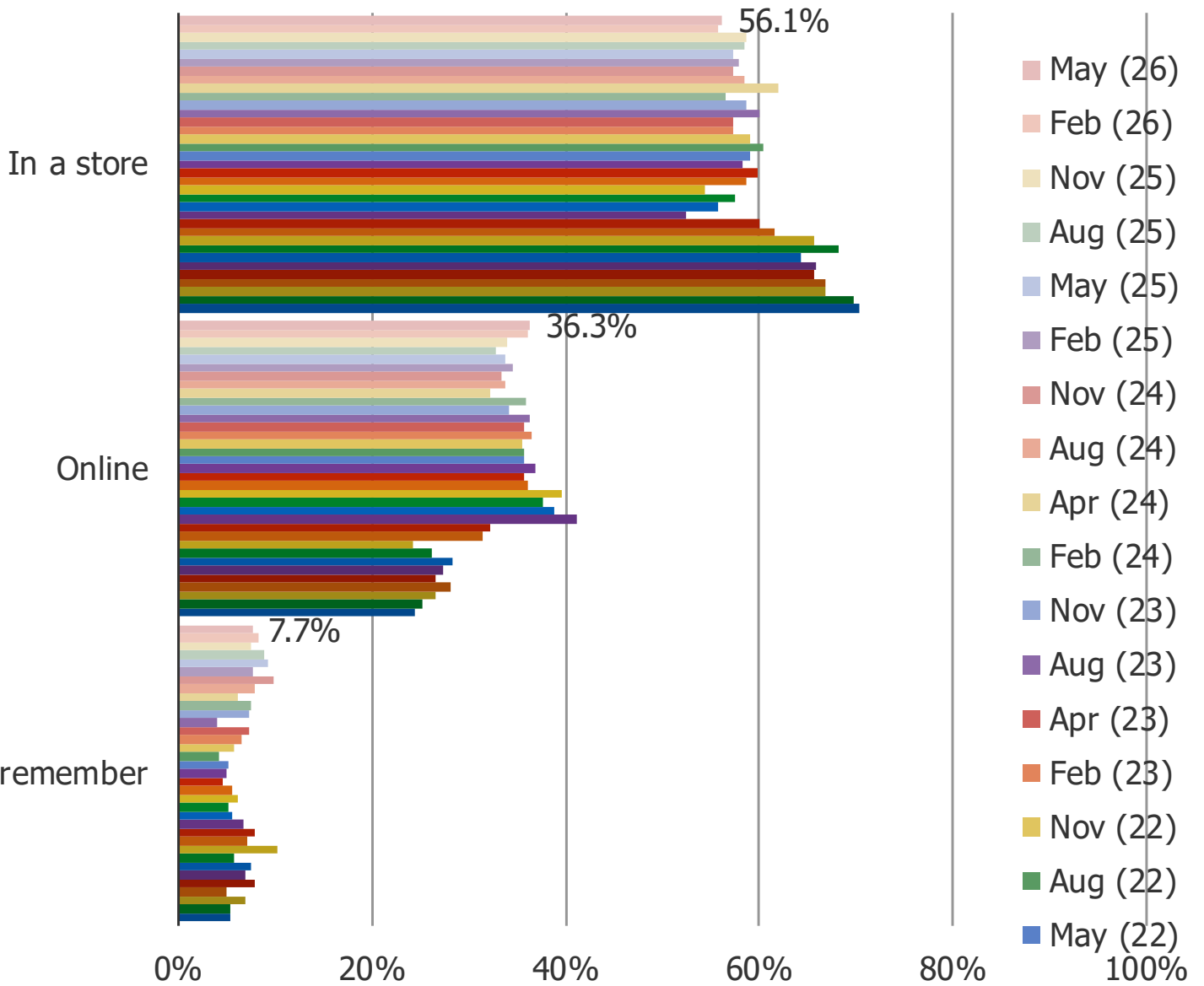
Posed to all respondents – Cross-tabbed by if they prefer to buy direct or from retailers.

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?

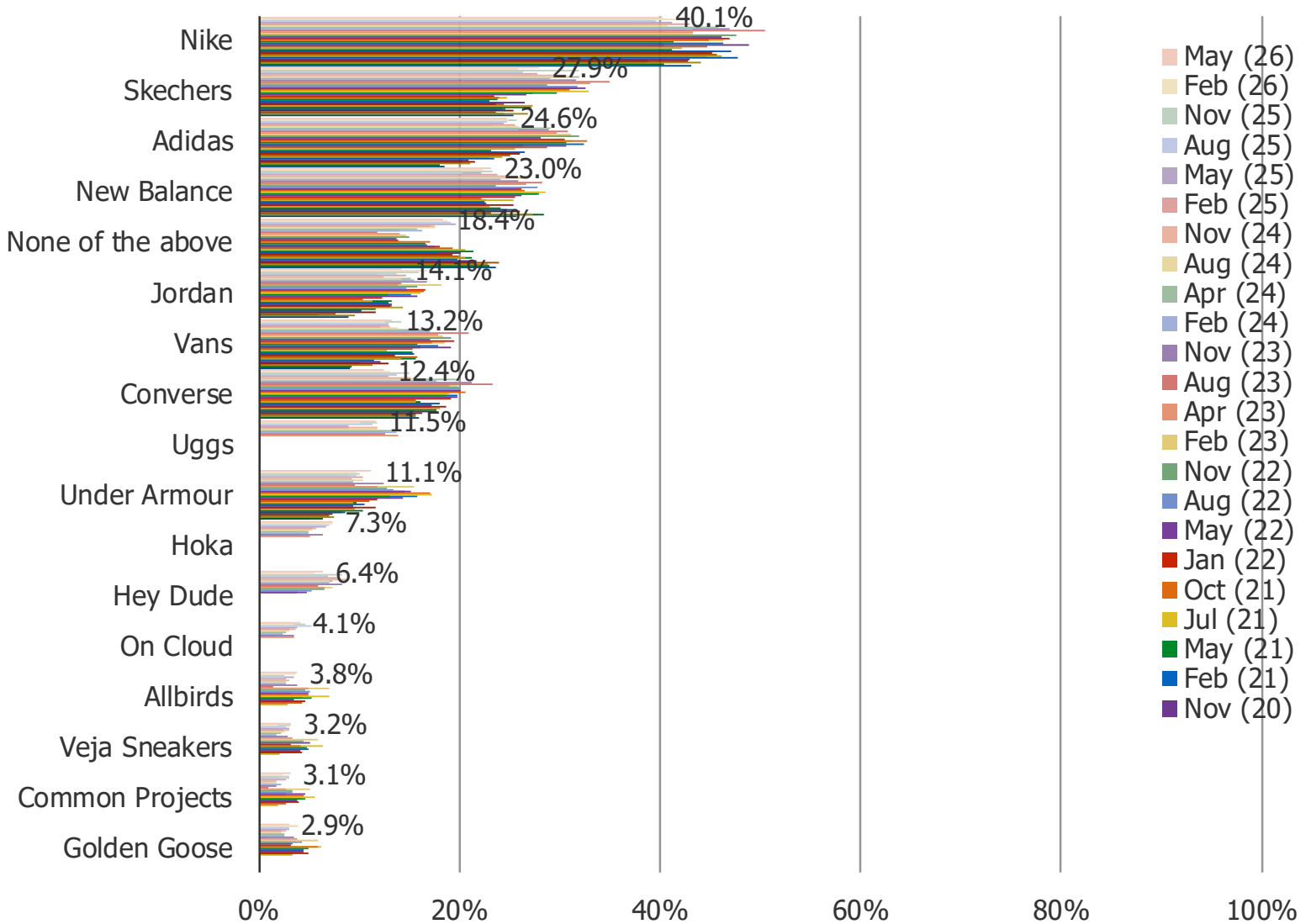
Posed to all respondents



SNEAKER BRANDS

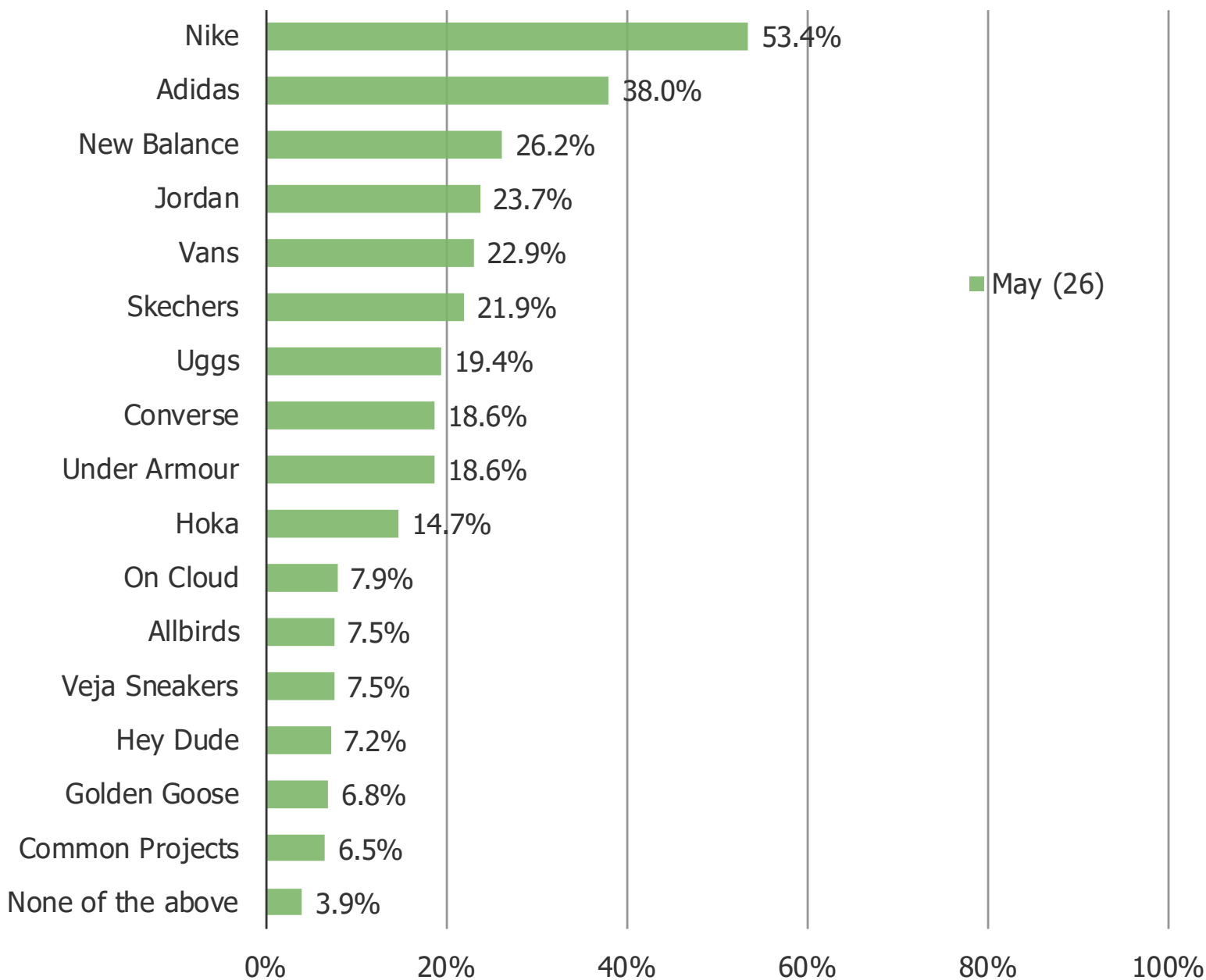
WHICH OF THE FOLLOWING BRANDS DO YOU OWN SNEAKERS FROM?

Posed to all respondents



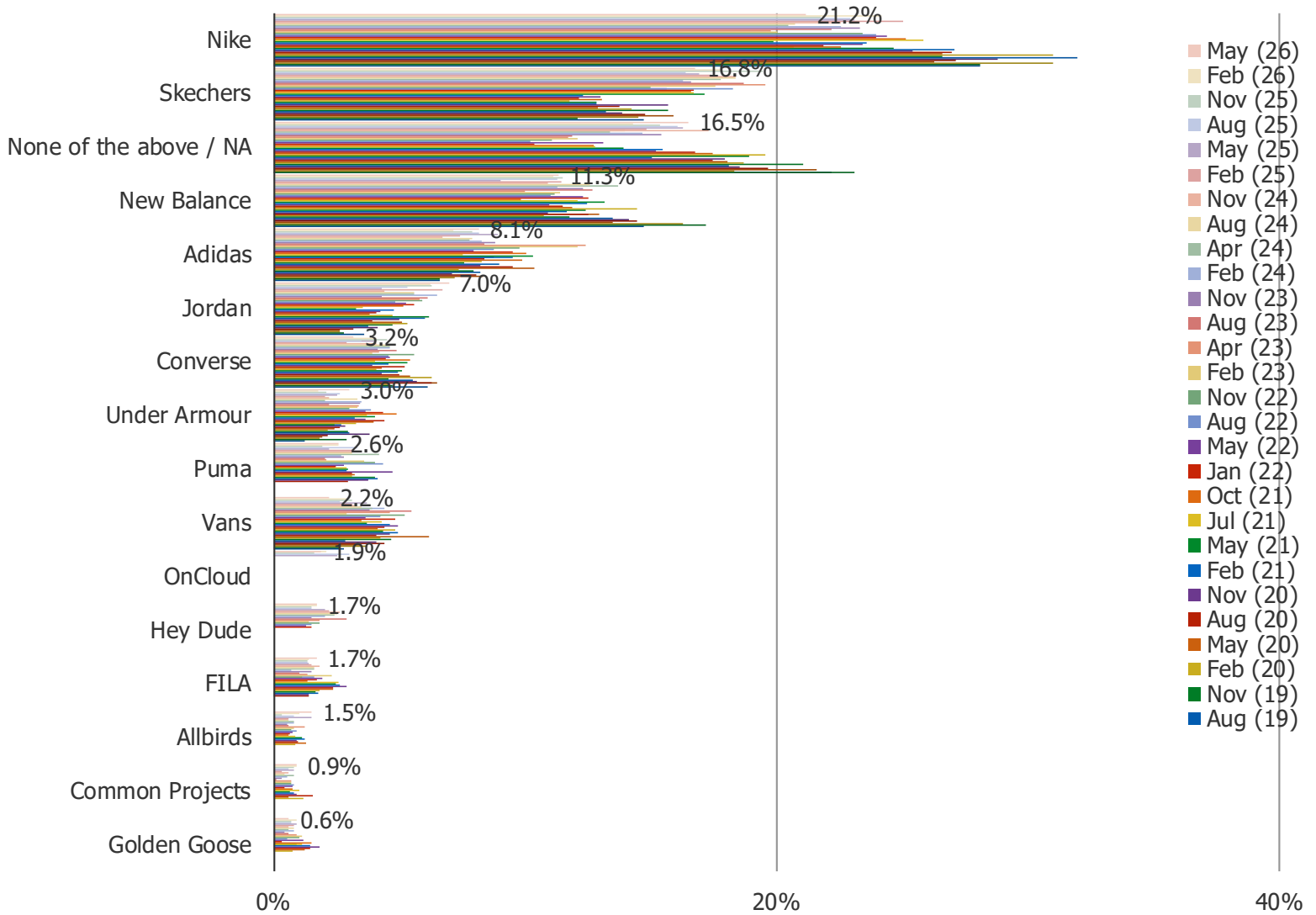
WHICH OF THE FOLLOWING FOOTWEAR BRANDS DO YOU OWN SNEAKERS/FOOTWEAR FROM?

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



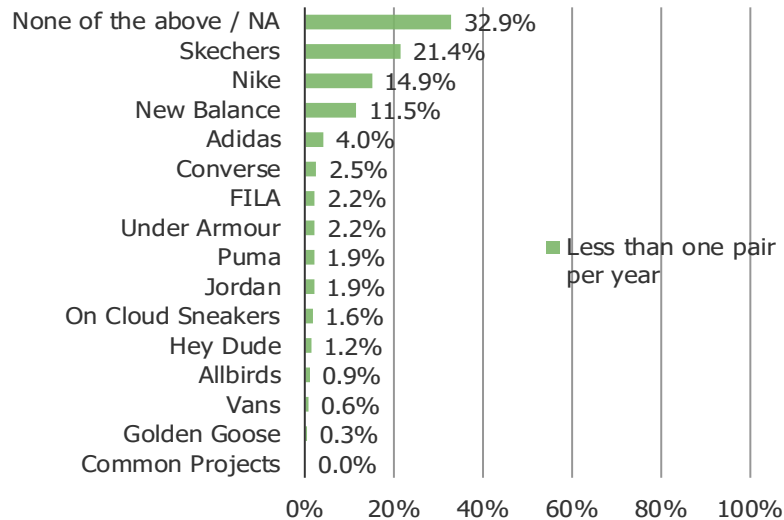
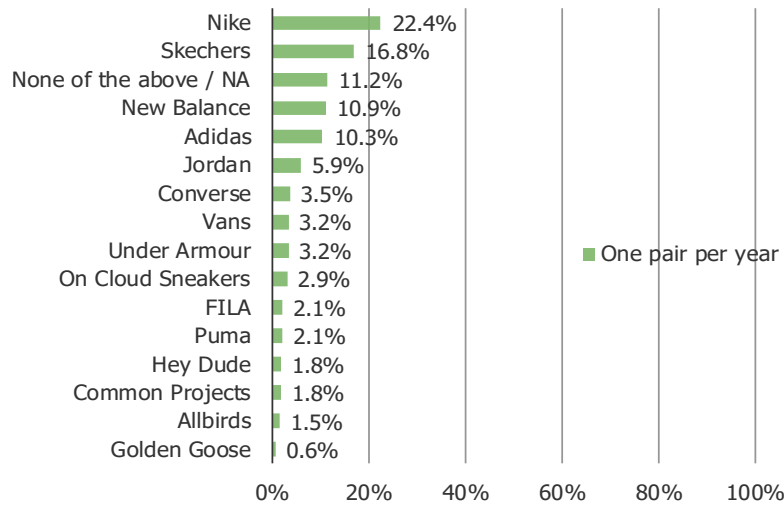
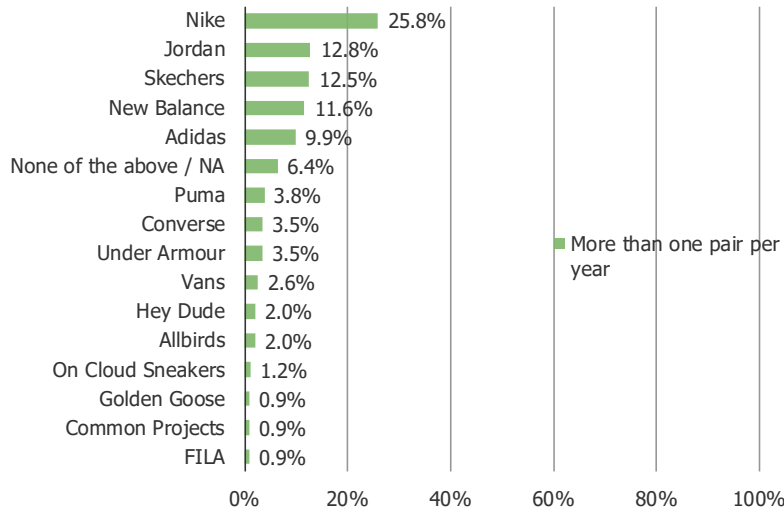
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

Posed to all respondents



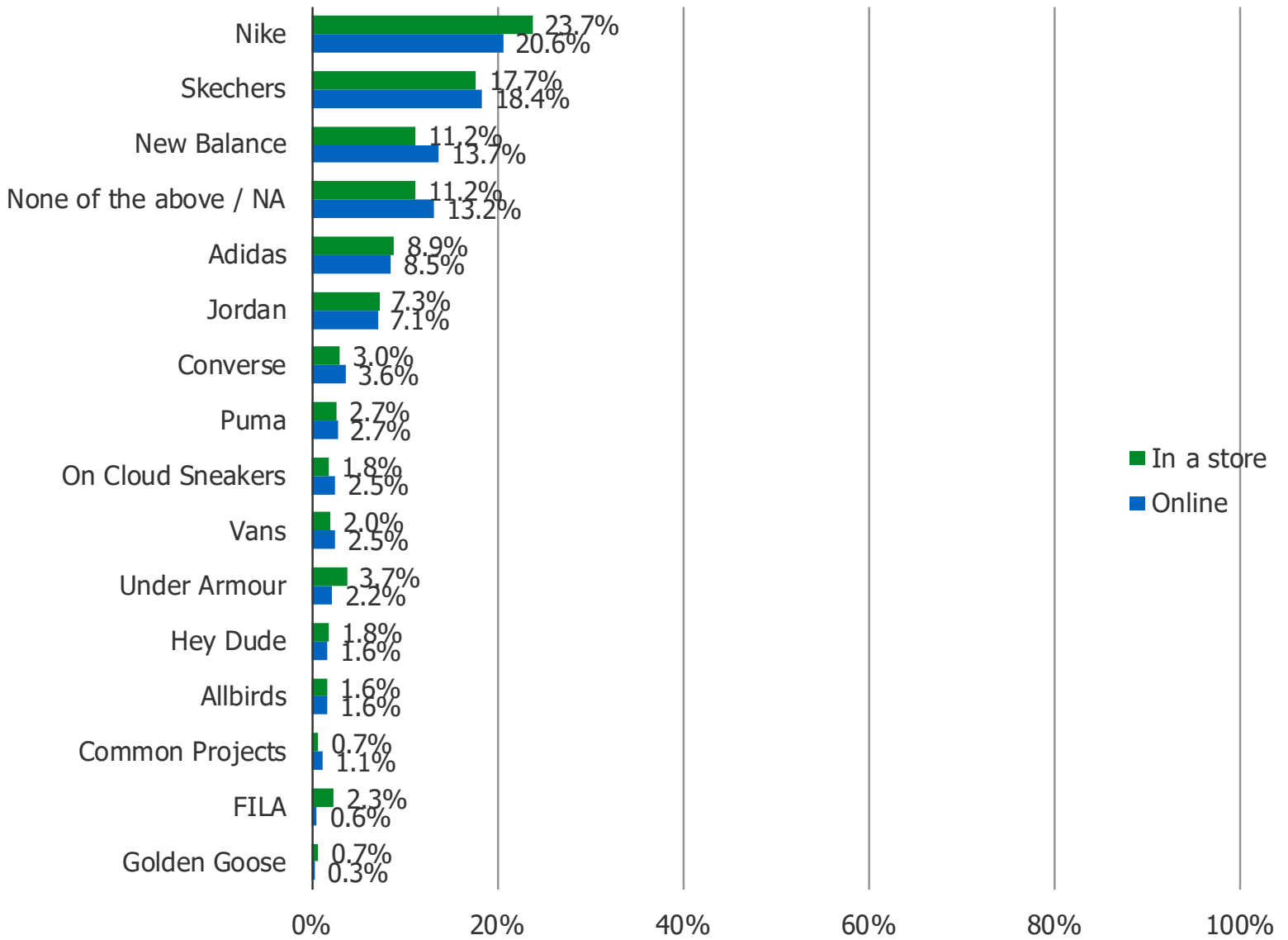
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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



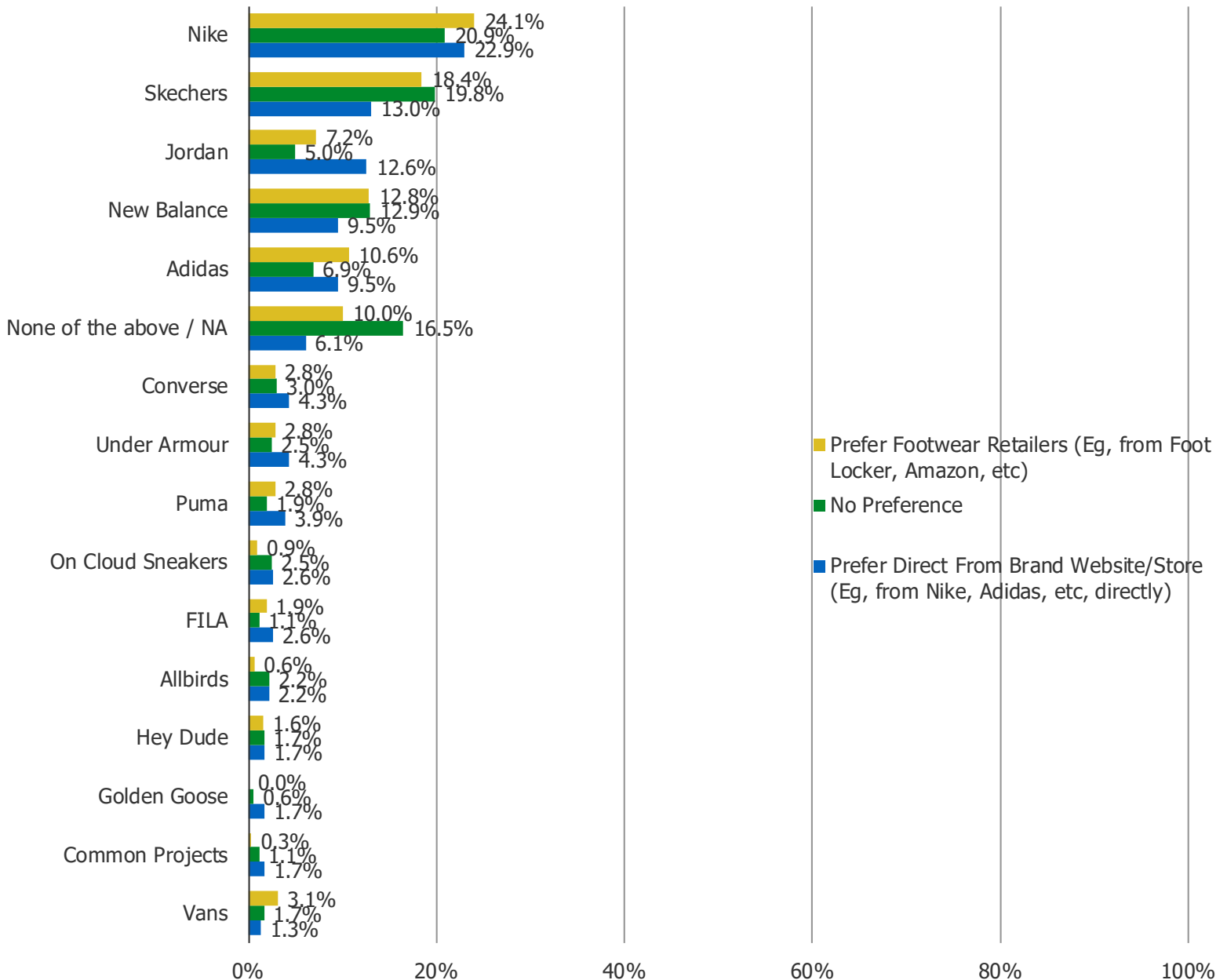
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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



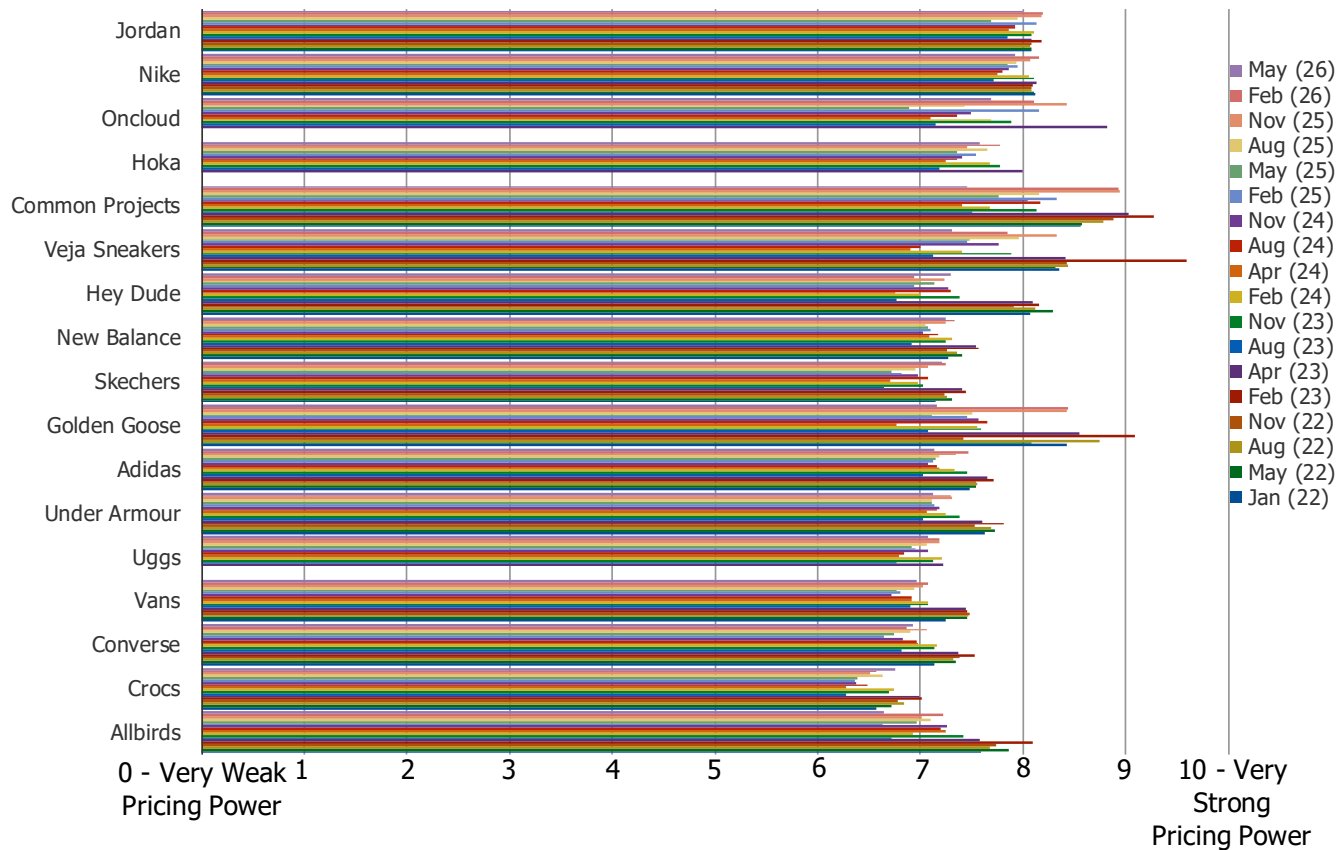
IF YOU WERE BUYING A NEW PAIR OF SNEAKERS TODAY, WHICH BRAND WOULD YOU BE MOST LIKELY TO CHOOSE?

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?

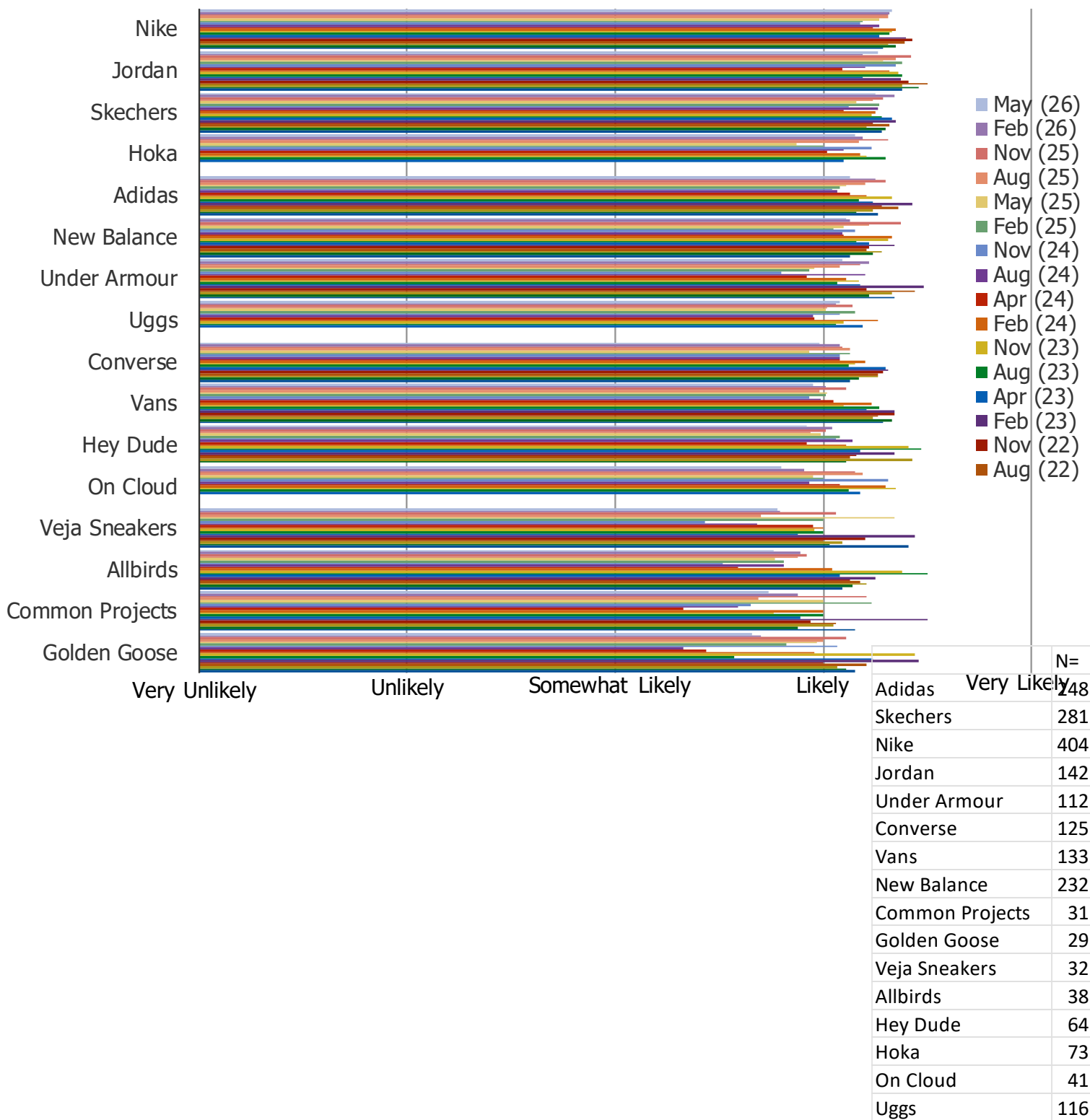
Posed to respondents who have heard of each of the following:



	N=
Adidas	657
Skechers	594
Nike	720
Jordan	527
Under Armour	429
Converse	550
Vans	477
New Balance	567
Common Projects	48
Golden Goose	70
Veja Sneakers	54
Allbirds	104
Hey Dude	192
Crocs	520
Hoka	267
Oncloud	67
Uggs	461

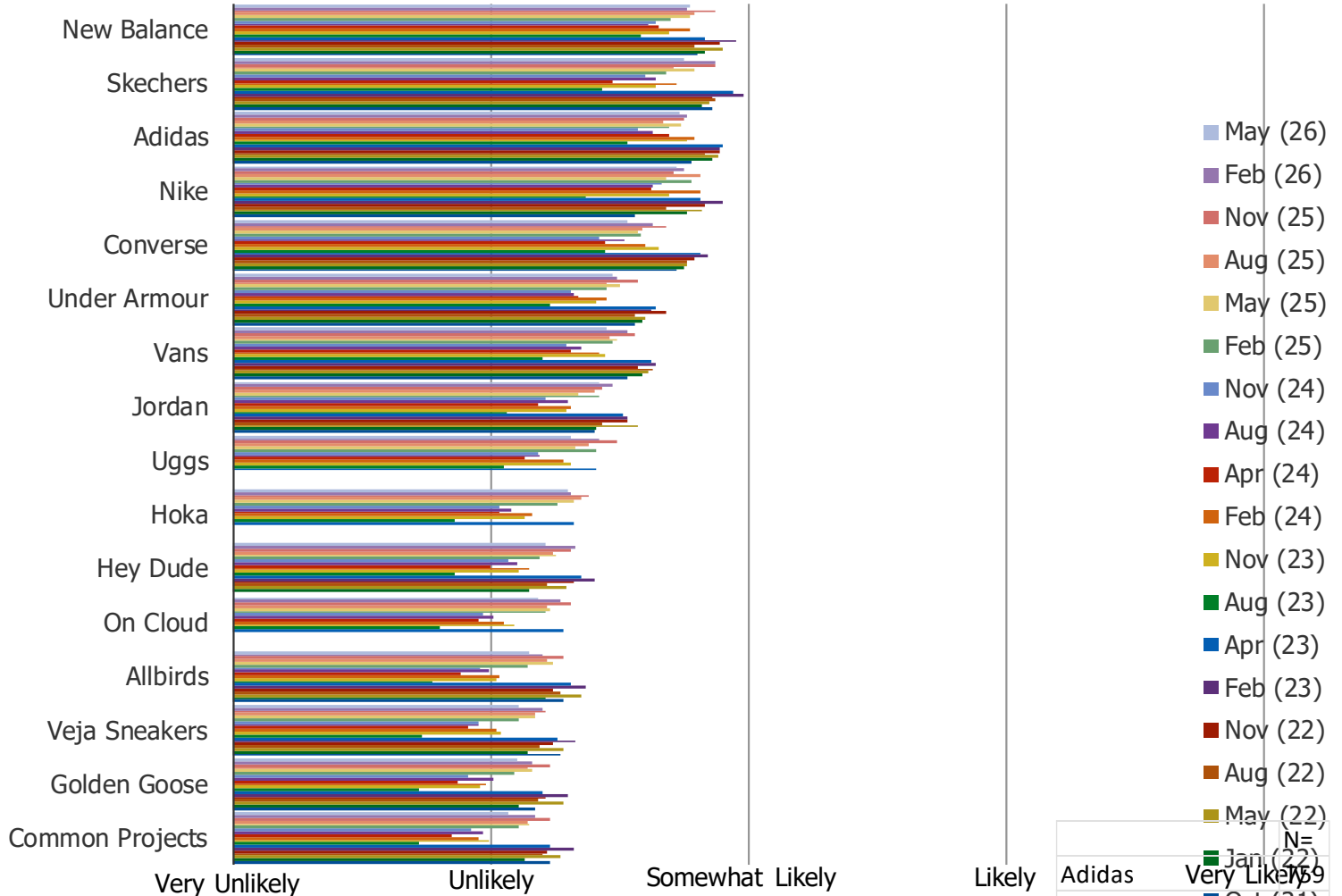
HOW LIKELY ARE YOU TO BUY SNEAKERS FROM THE FOLLOWING BRANDS AGAIN IN THE FUTURE?

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



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.

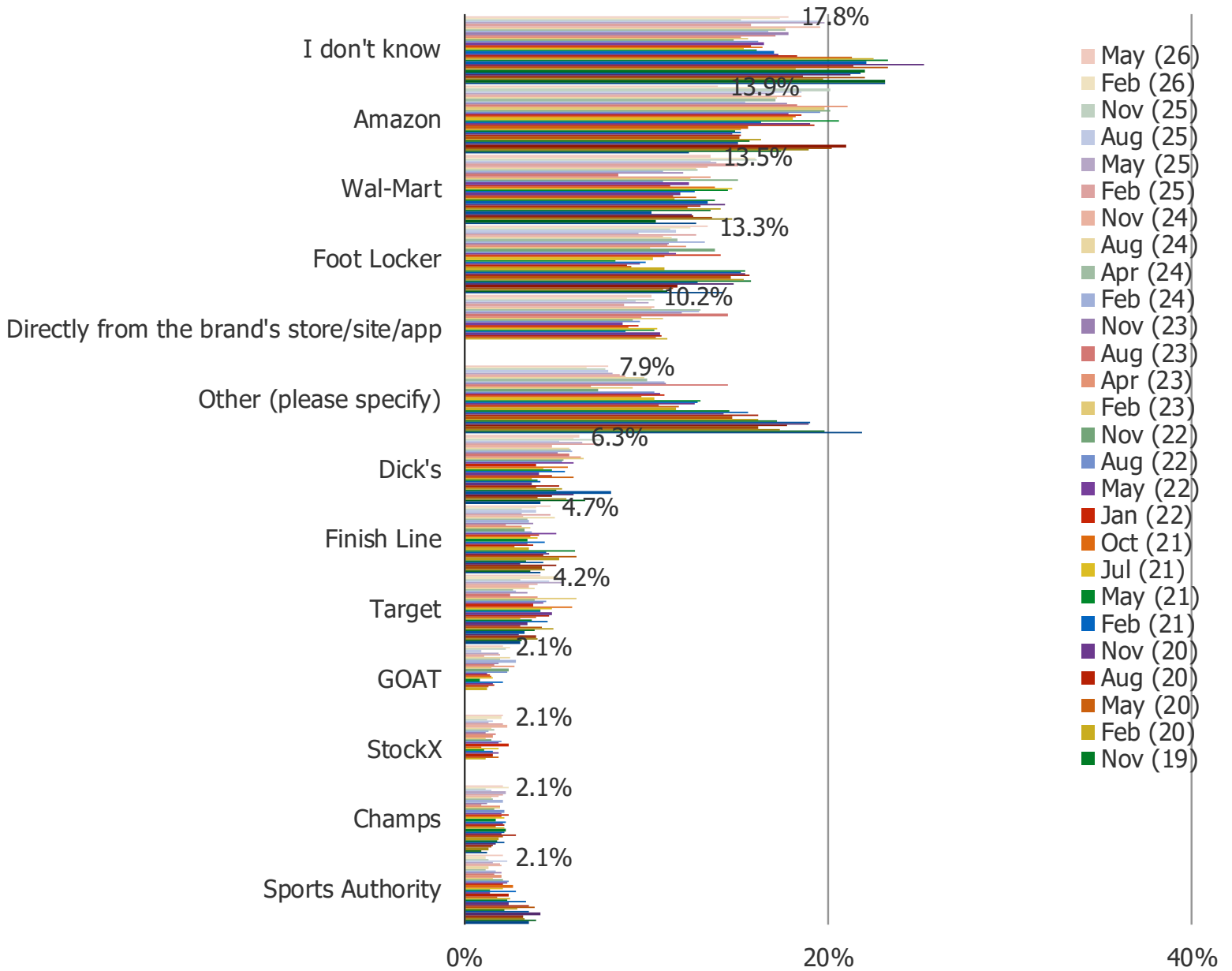


Adidas	Very Likely	159
Skechers	Very Likely	726
Nike		603
Jordan		865
Under Armour		895
Converse		882
Vans		874
New Balance		775
Common Projects		976
Golden Goose		978
Veja Sneakers		975
Allbirds		969
Hey Dude		943
Hoka		934
On Cloud		966
Uggs		891

FOOTWEAR RETAILERS

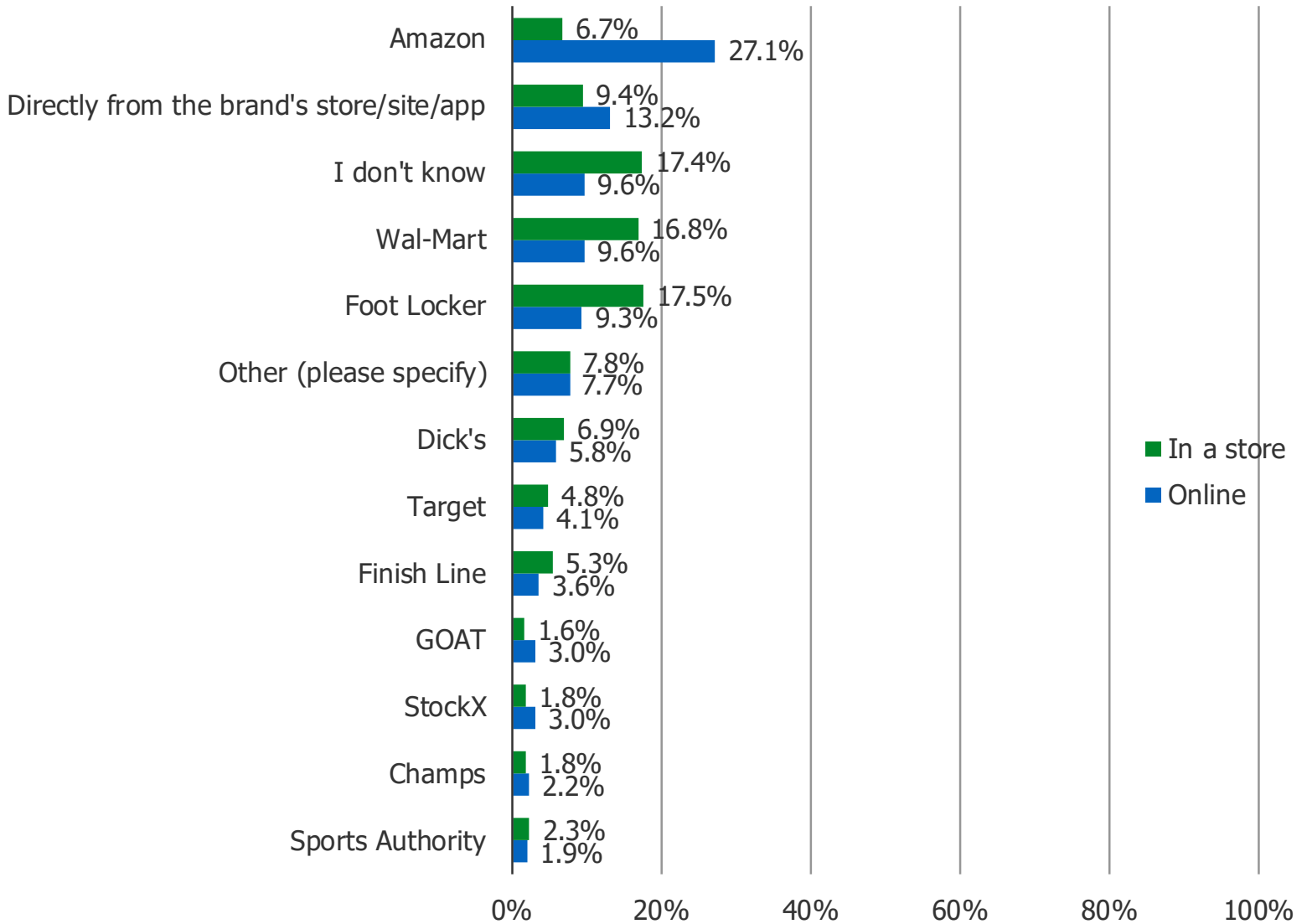
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

Posed to all respondents



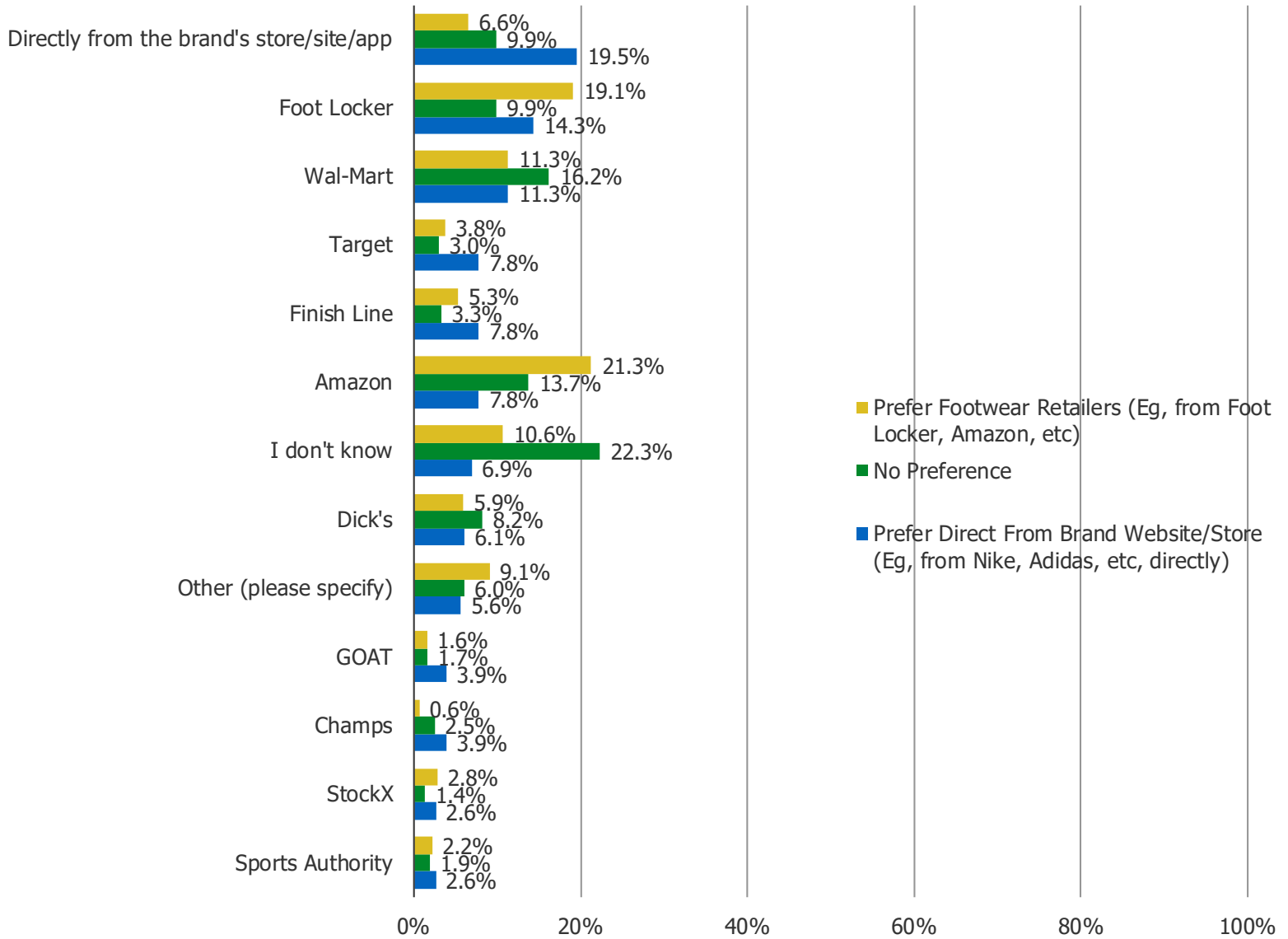
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



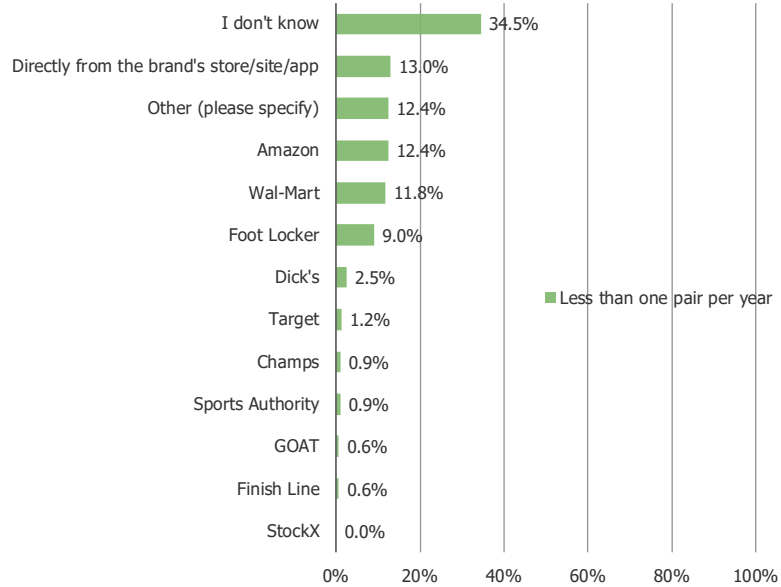
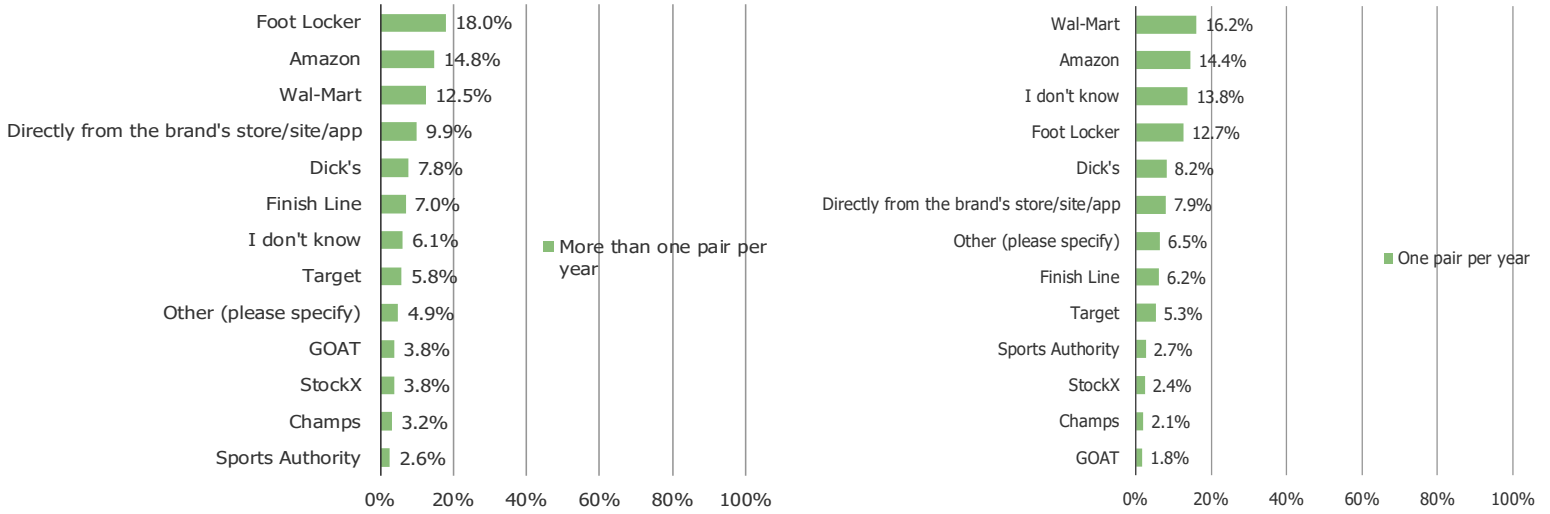
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



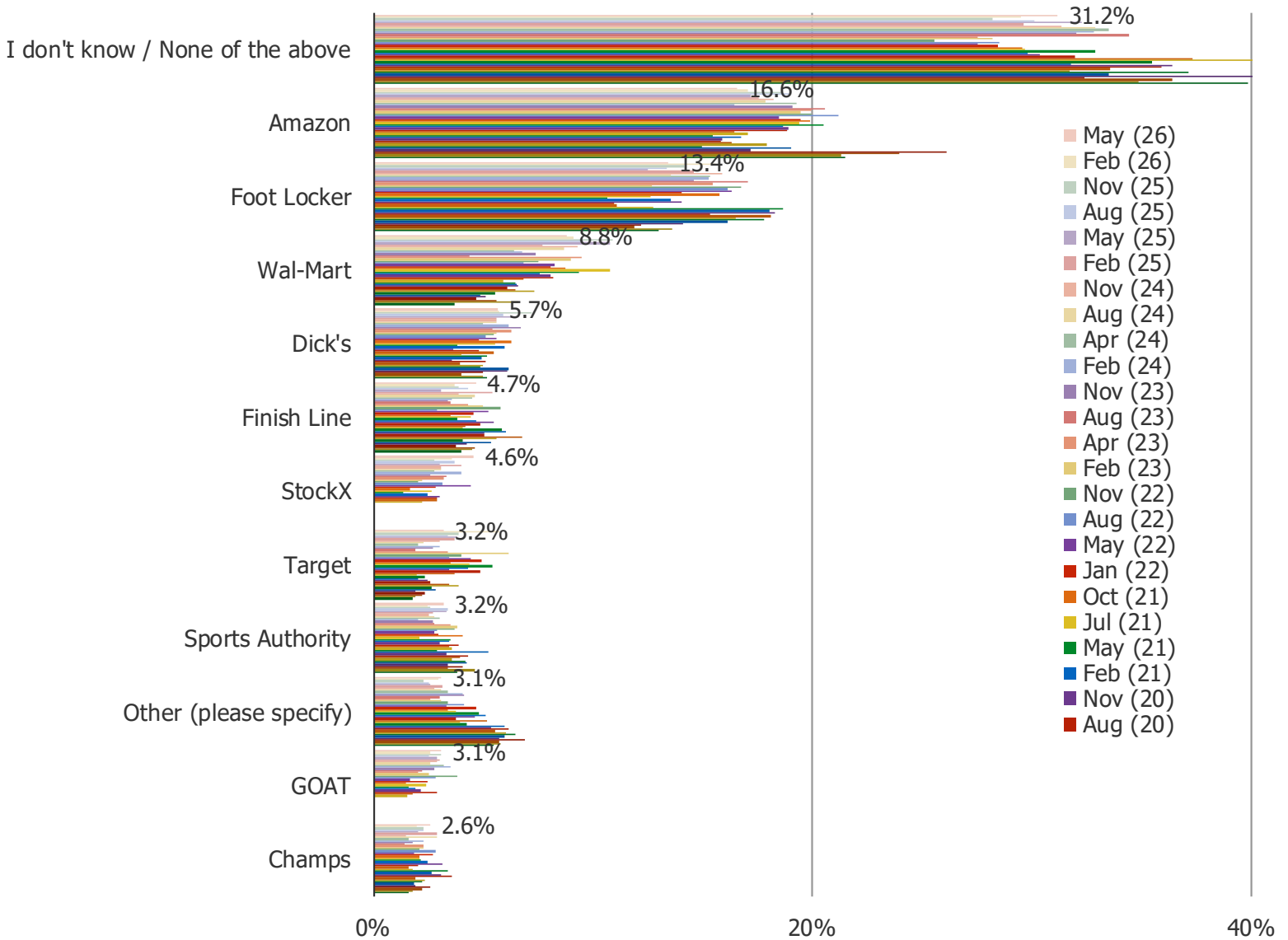
IF YOU WERE BUYING SNEAKERS/FOOTWEAR TODAY, WHERE WOULD YOU BE MOST LIKELY TO PURCHASE THEM?

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



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

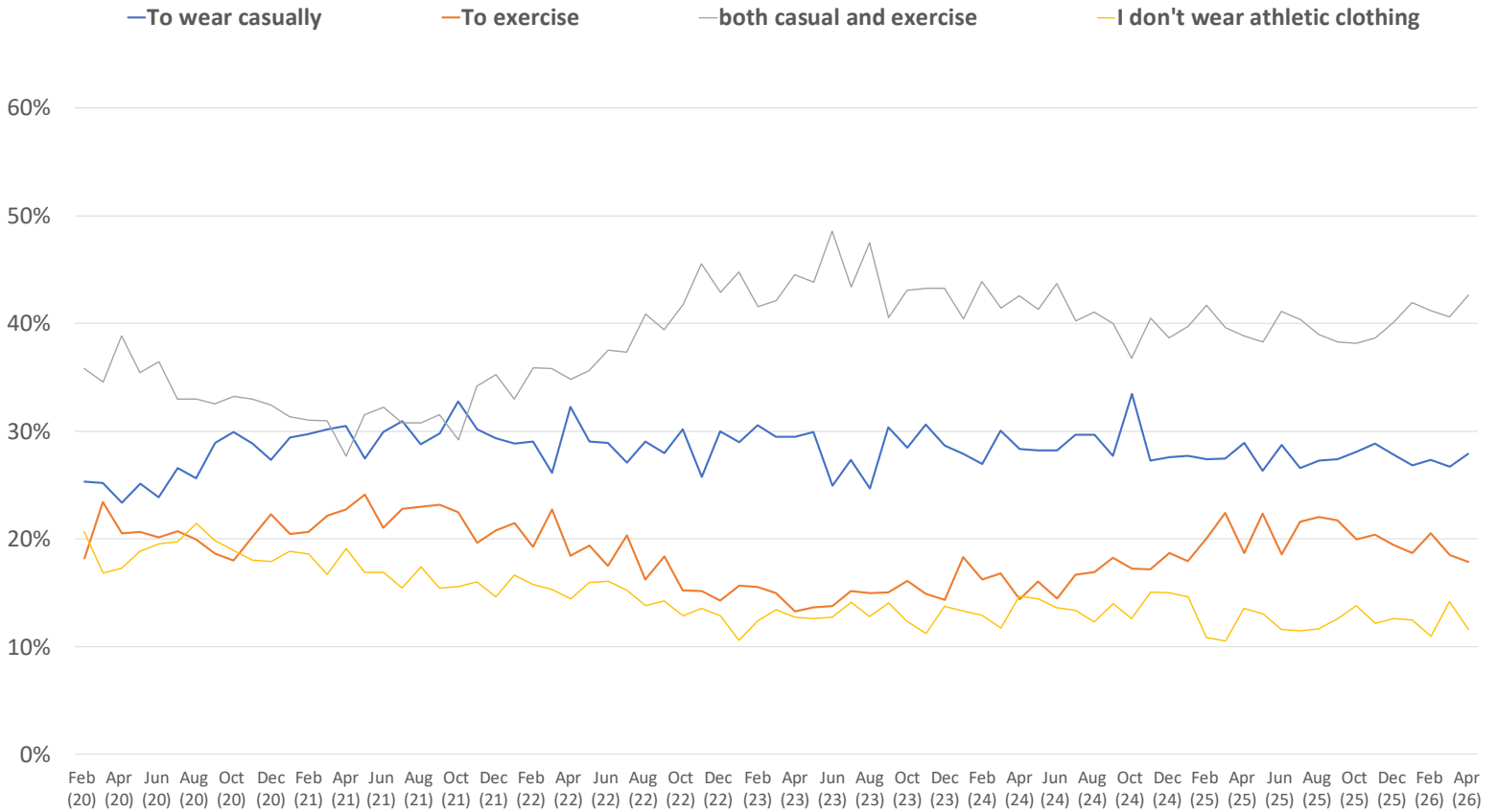
Posed to all respondents



CASUAL WEAR

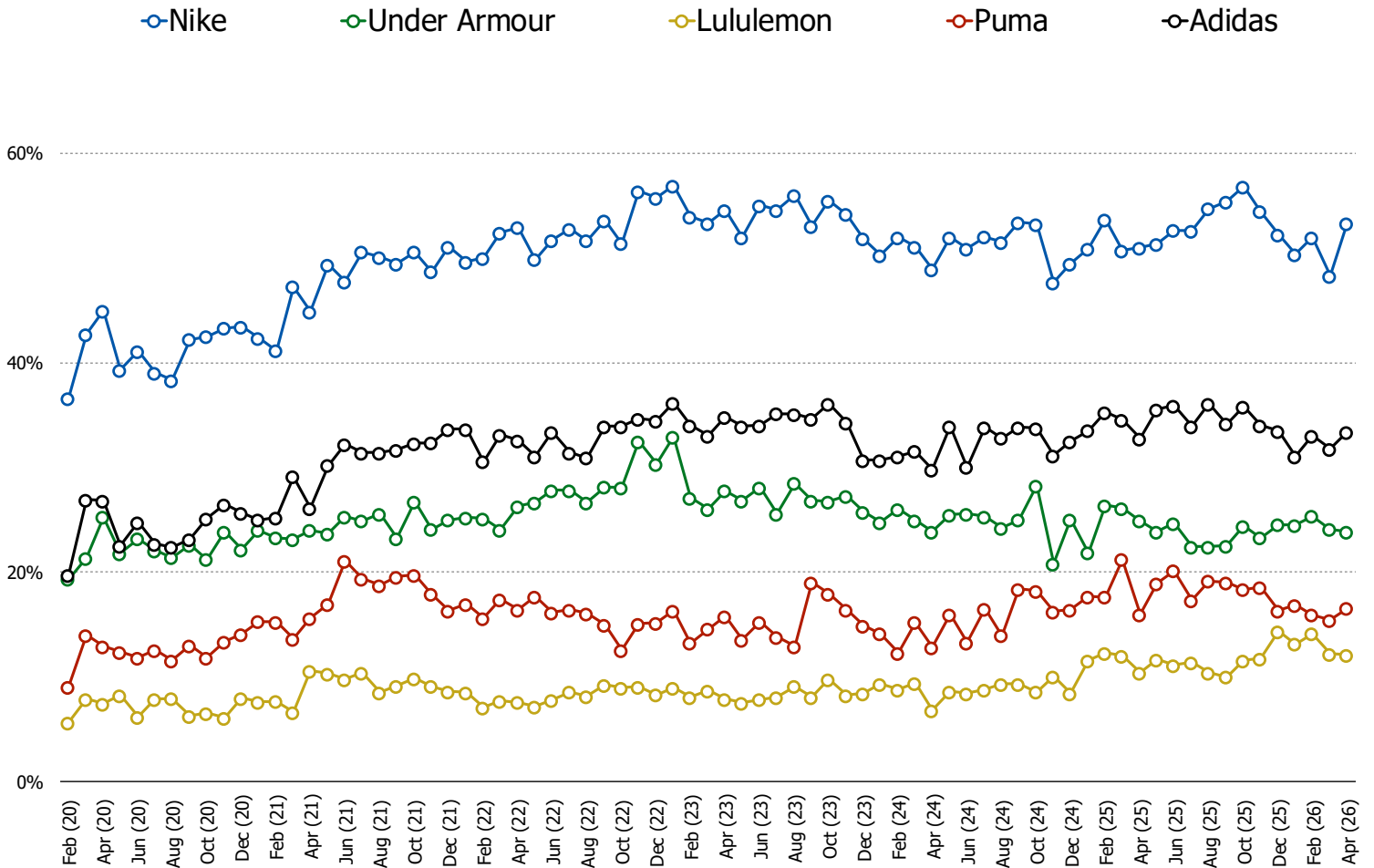
WHAT DO YOU USE ATHLETIC CLOTHING FOR?

Posed to all respondents



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

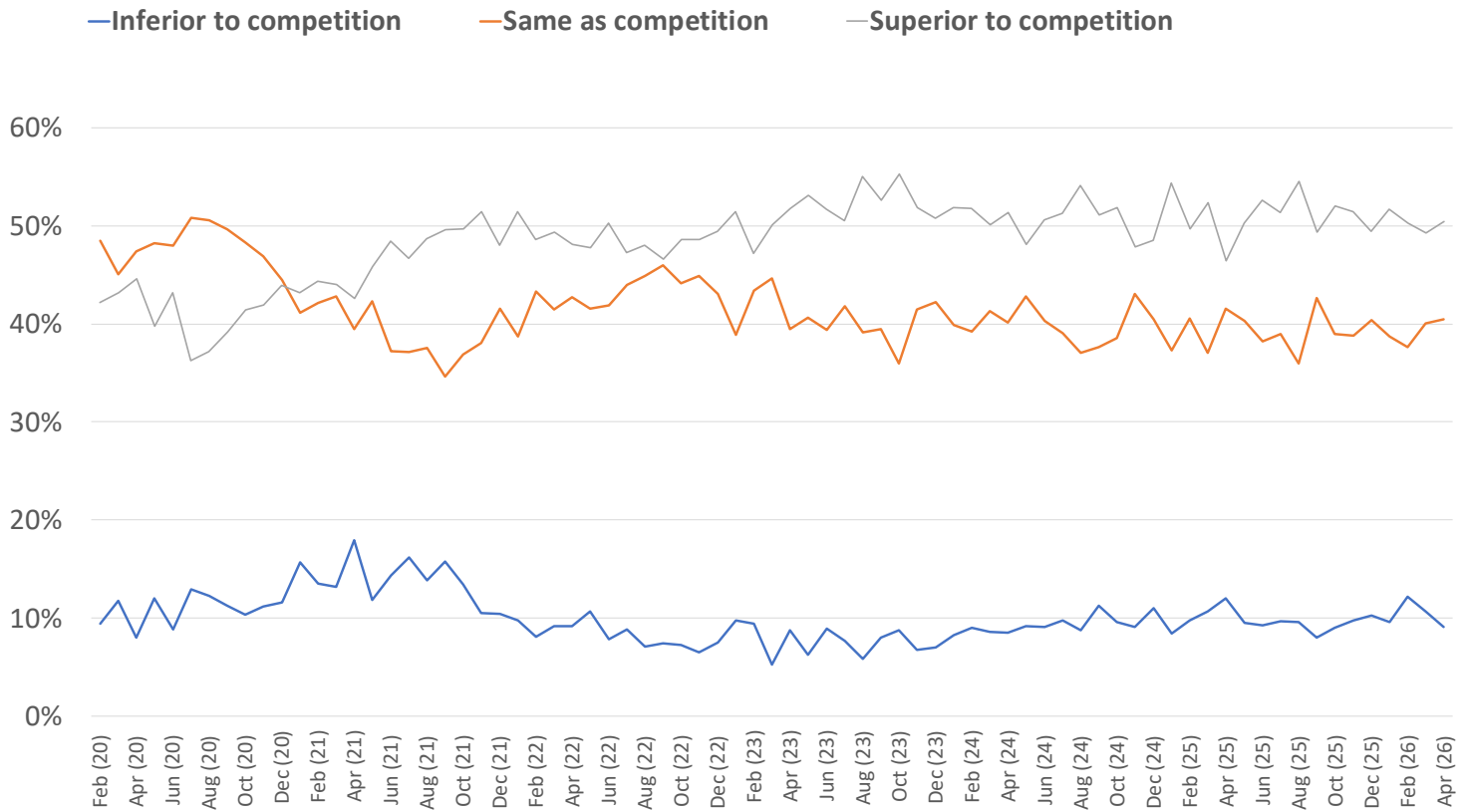
Posed to all respondents



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

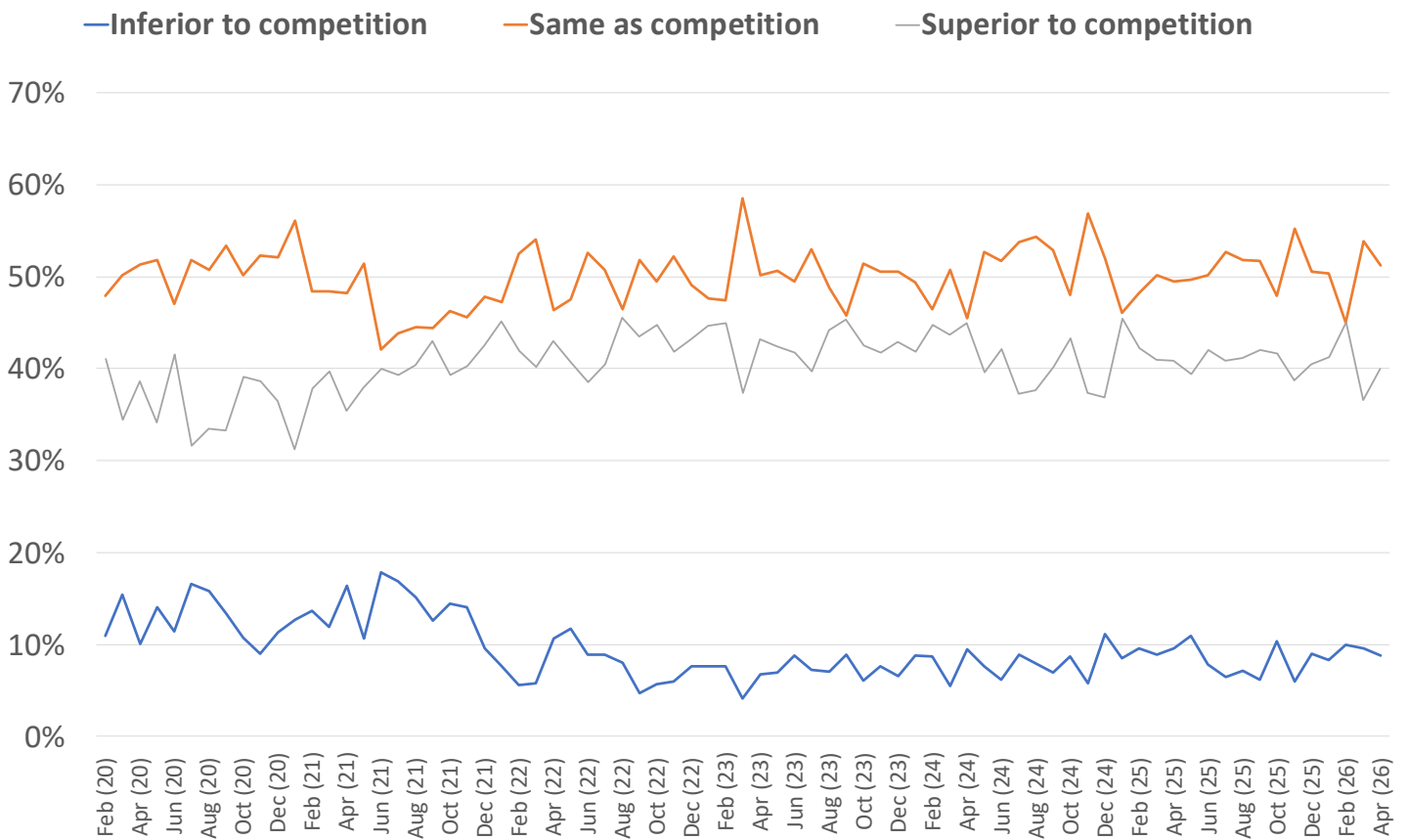
NIKE



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

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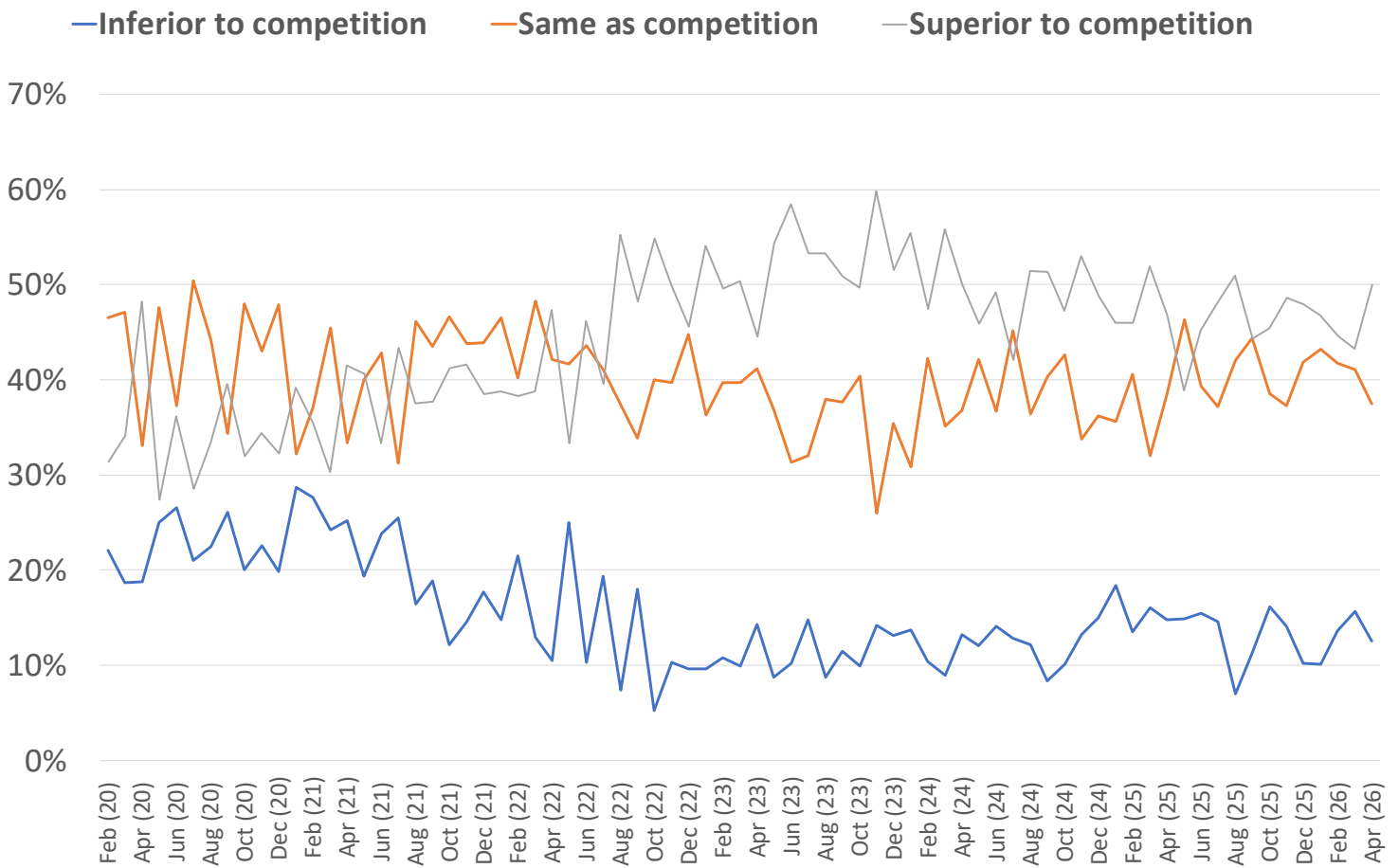
UNDER ARMOUR



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

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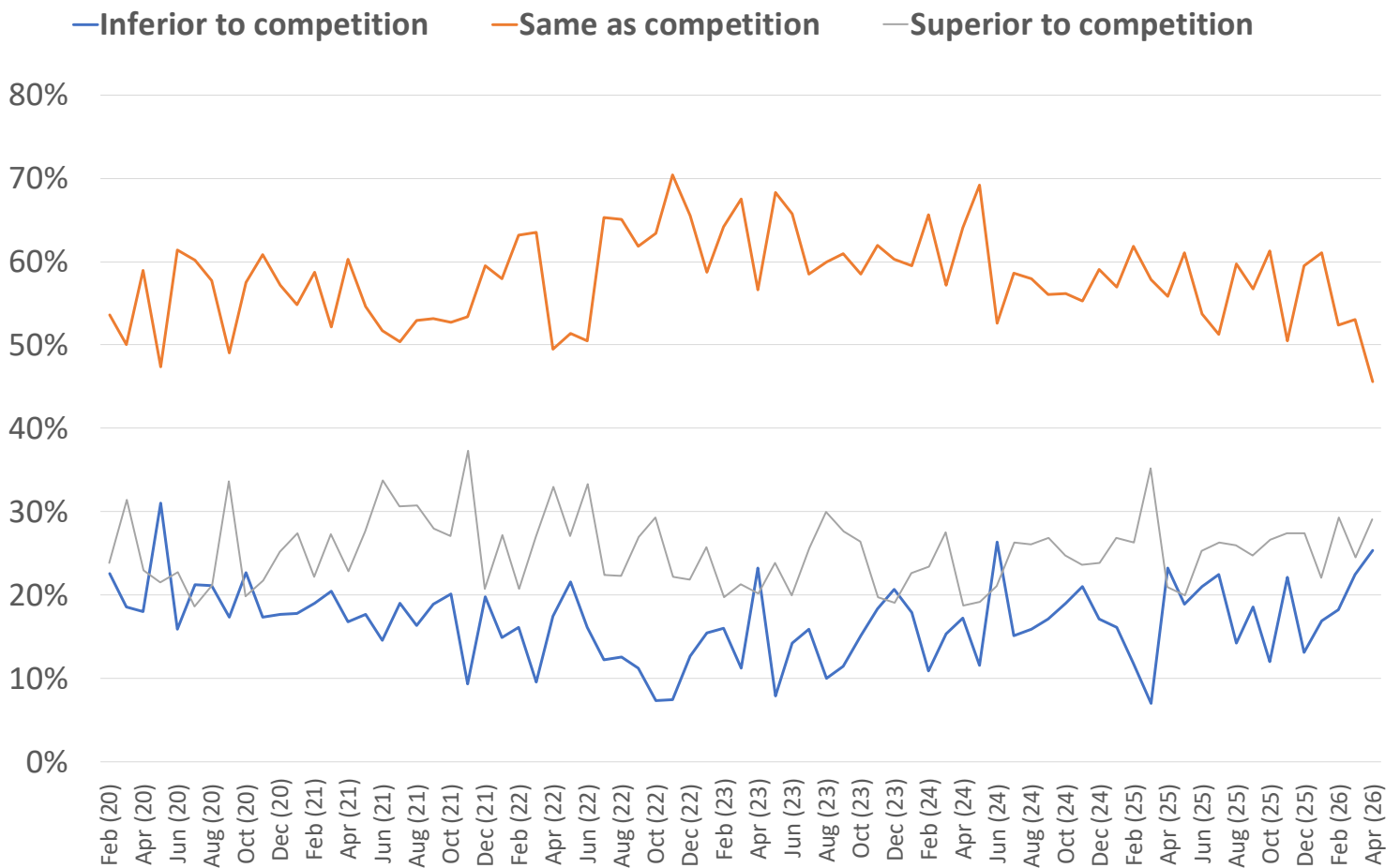
LULULEMON



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

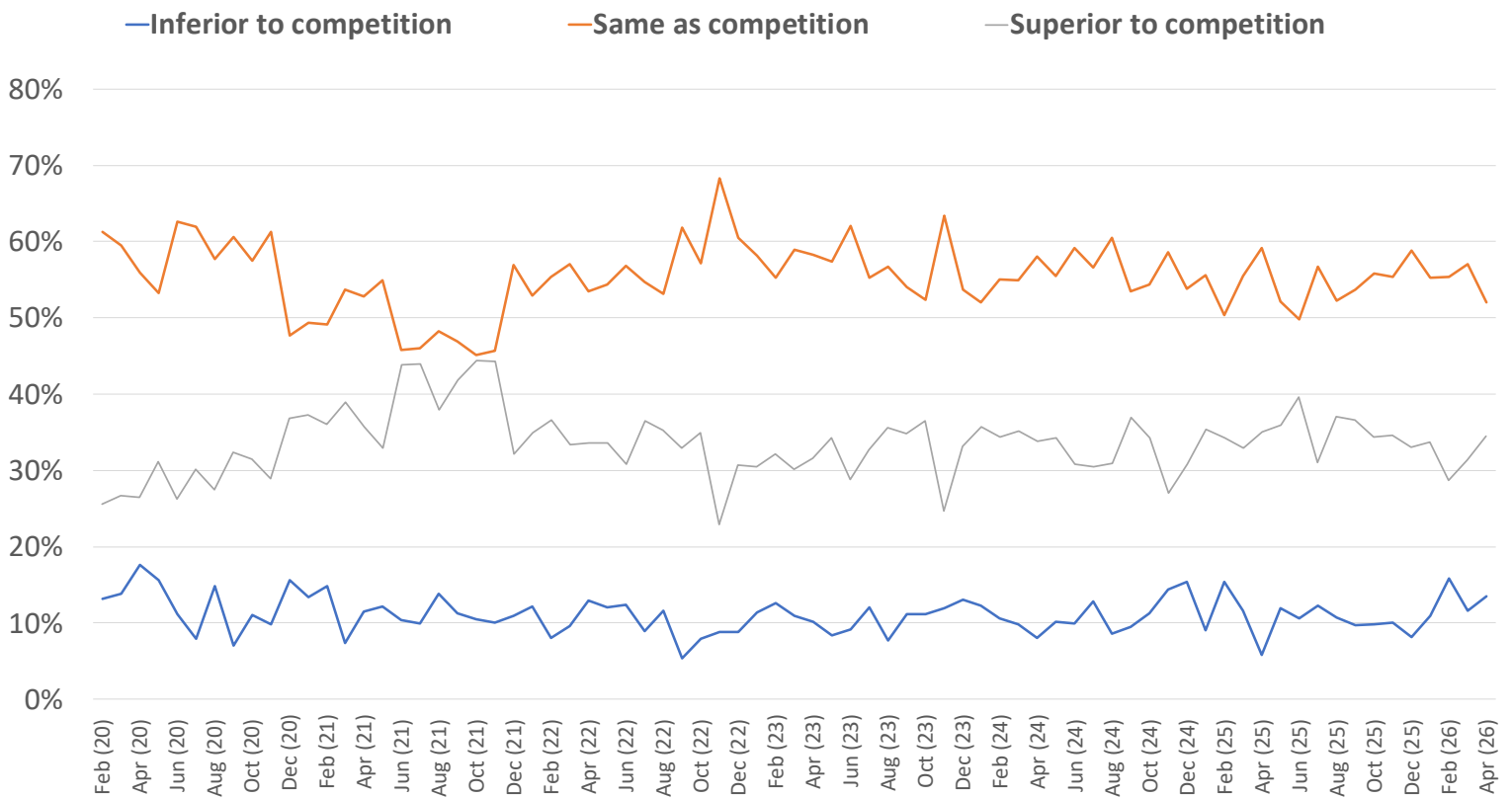
FILA



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

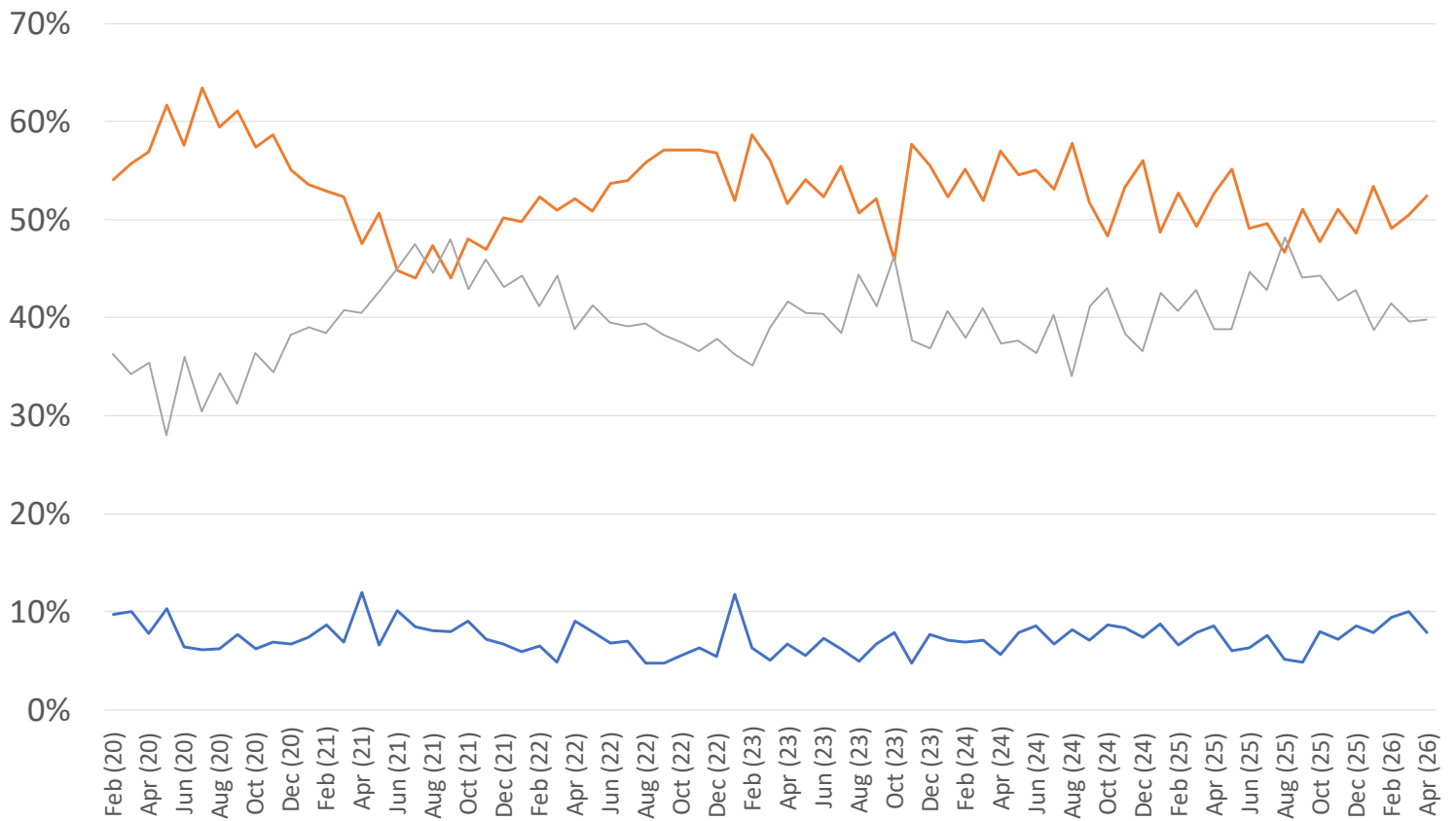


IN YOUR OPINION, HOW DOES THIS BRAND'S CLOTHING COMPARE TO COMPETITIVE OPTIONS WHEN IT COMES TO ATHLETIC PERFORMANCE?

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

ADIDAS

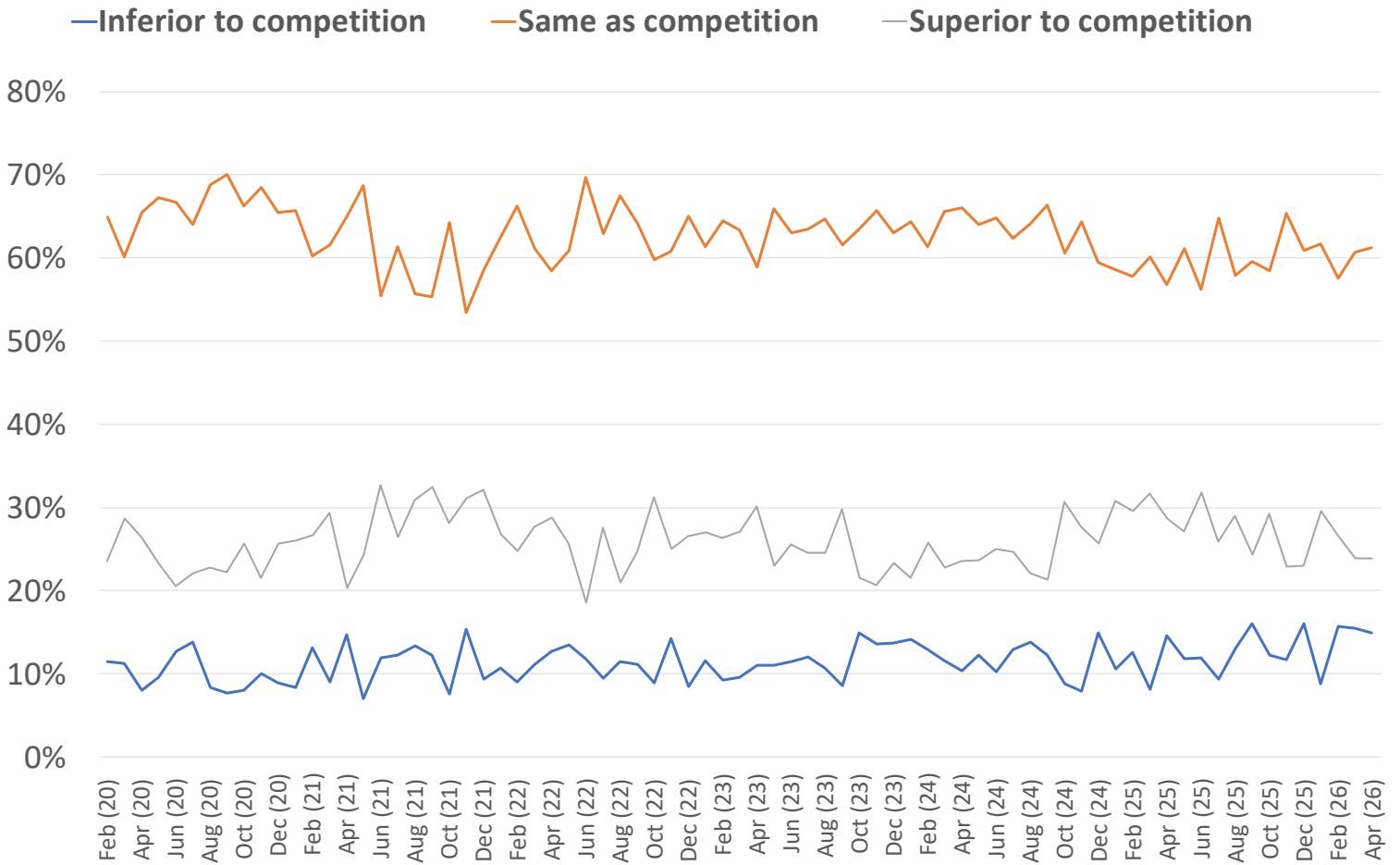
—Inferior to competition —Same as competition —Superior to competition



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

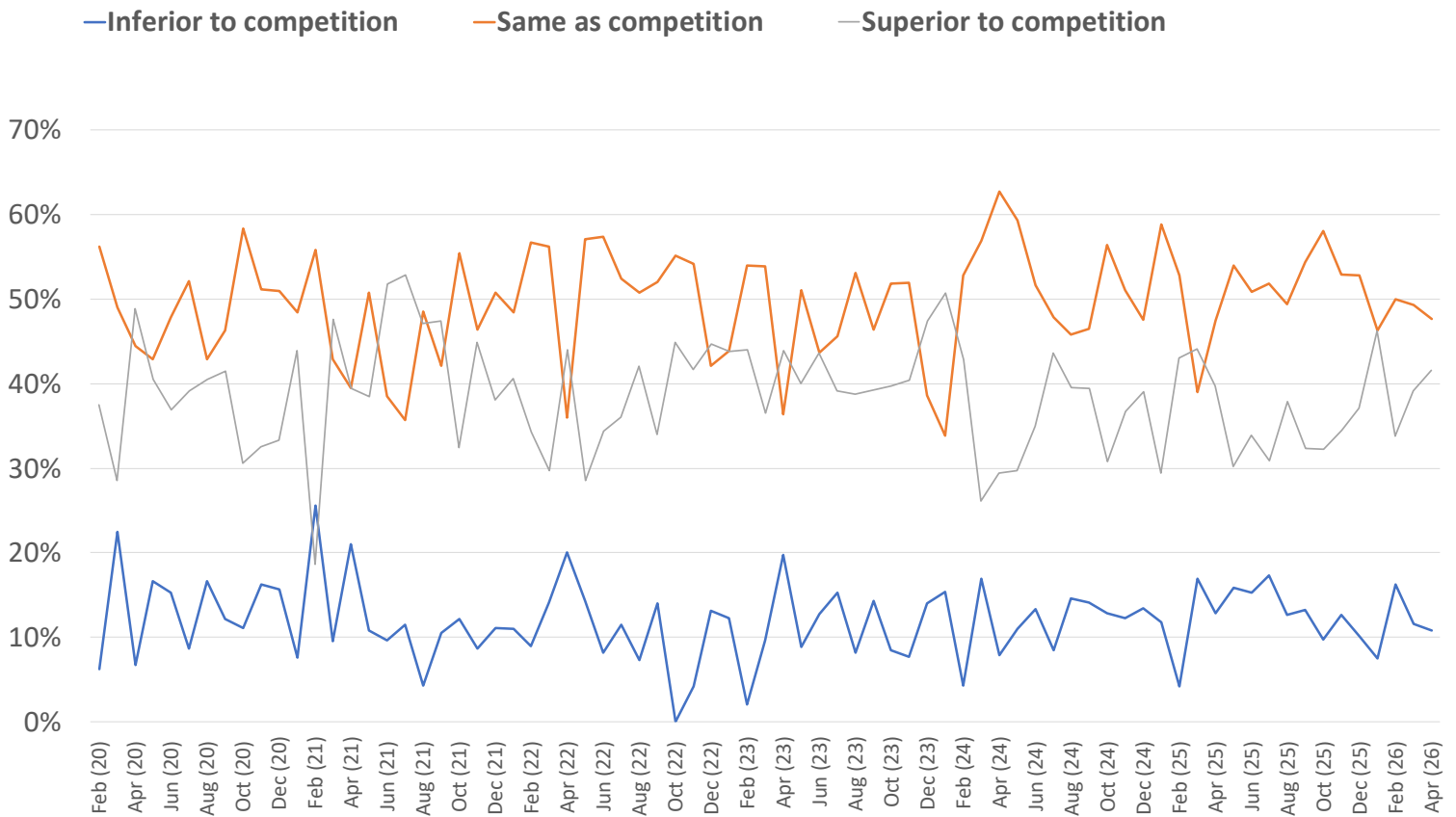
CHAMPION



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

