

- OBJECTIVE: Analyze NYC market and consumer to inform FW26 product briefs for the Lifestyle Footwear category.

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Insight, Design, and Presentation
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01

MARKET MOVEMENTS

*UNDERLYING SHIFTS AND HOW TO
RESPOND*

SEEKING IDENTITY IN COLLAPSING TRENDS

The overwhelming pace of exponential progress has collapsed the lifecycle of cultural trends. What used to evolve over decades now emerges and dissipates in a matter of months—or even weeks. Consumers are finding it difficult to keep pace and are resorting to a more enduring and foundation-based approach to their wardrobe.

—> Solidify and highlight our foundation.

Online personal stylist services is anticipated to grow to \$1.2 trillion by 2032, with a **CAGR of 37% from 2024 to 2032.**

The market for clothing subscription services is expected to grow nearly **300% over the next 8 years.**

SMALLER, BIGGER BRANDS

Experience - Aime Leon Dore natural extensions into Store, Cafe, and Lounge in multiple countries

Efficiency - Skims - \$4B valuation / \$1m in revenue per employee (4x lululemon) 5yrs old (5x younger than lululemon).

AIME LEON DORE NYC

The market is fragmenting. Brands are doing more with less — leveraging a specific point of view to build better product, curate better experiences, and build a deeper connection with their consumer.

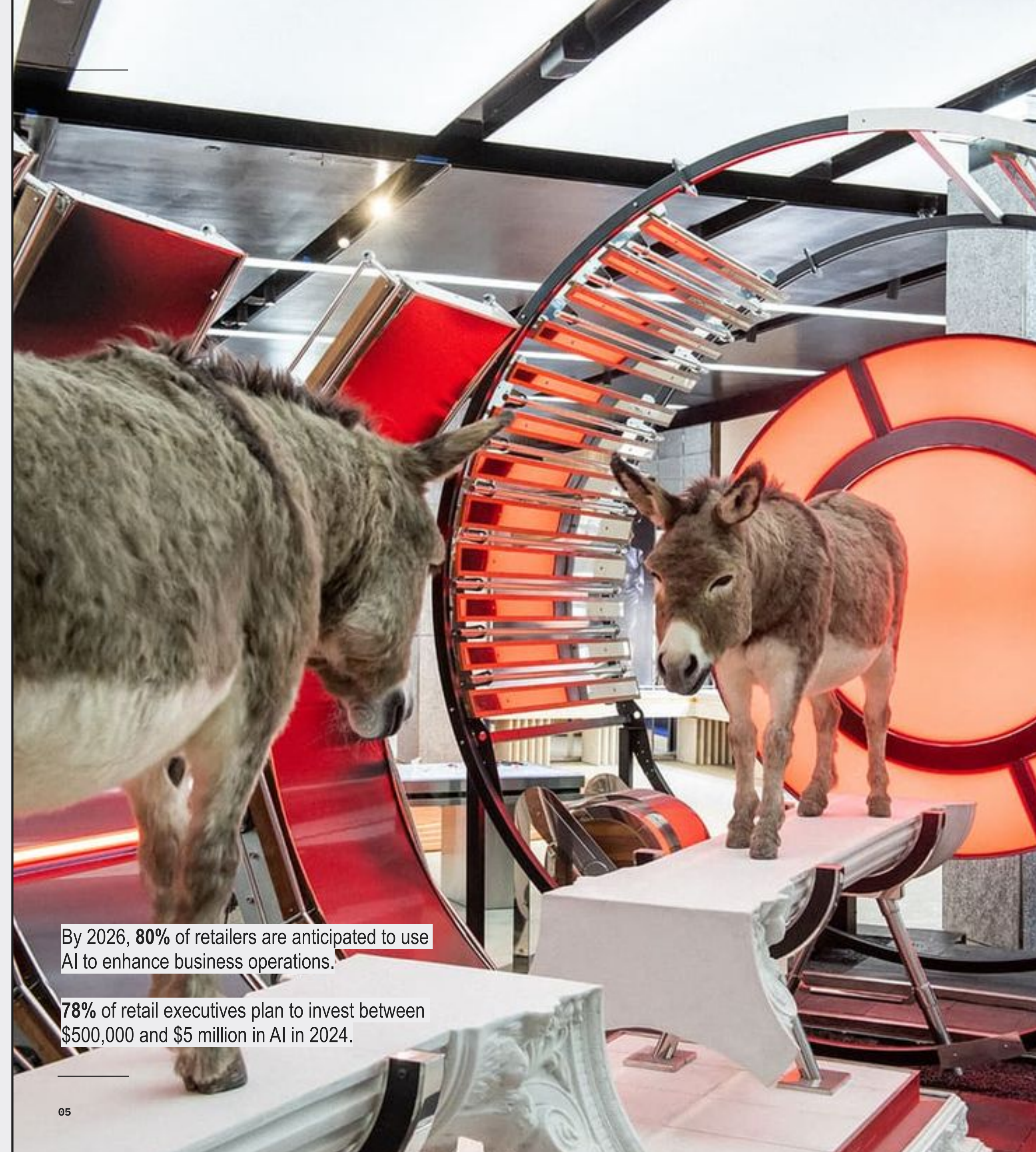
—> Leverage vertical strengths, messaging, and aesthetic.

‘ARTIFICIAL’ ATTENTION

Brands are beginning to harness the powers of AI to stand out in our social feeds— augmenting product to capture attention, and share their vision, for longer.

Some brands—like Gentle Monster—have managed to deploy the same aesthetic across real-world assets delivering ‘heightened’ consumer experiences and new-found visceral connections to their products.

—> ‘Artificial’ experiences irl will become commonplace - how do we translate the lululemon experience.



By 2026, **80%** of retailers are anticipated to use AI to enhance business operations.

78% of retail executives plan to invest between \$500,000 and \$5 million in AI in 2024.

02.1

VOICE OF GUEST

*INSIGHTS FROM IN-PERSON
CONVERSATIONS WITH OUR GUEST*



It starts at the foot.

****** "My clothing has become a lot less loud and I'm finding that my shoes are the place to express my attitude if I need to."

27, She/Her

→ Footwear as the main character.

Mindless footwear purchasing has been replaced by intentional buying. 1-in-1 out policy. (*likely sign of economies as well..)

****** "Because of hype, I feel like the shoes become cheaper over time. I dislike that culture because I feel like we're the ones being consumed."

22, She/Her

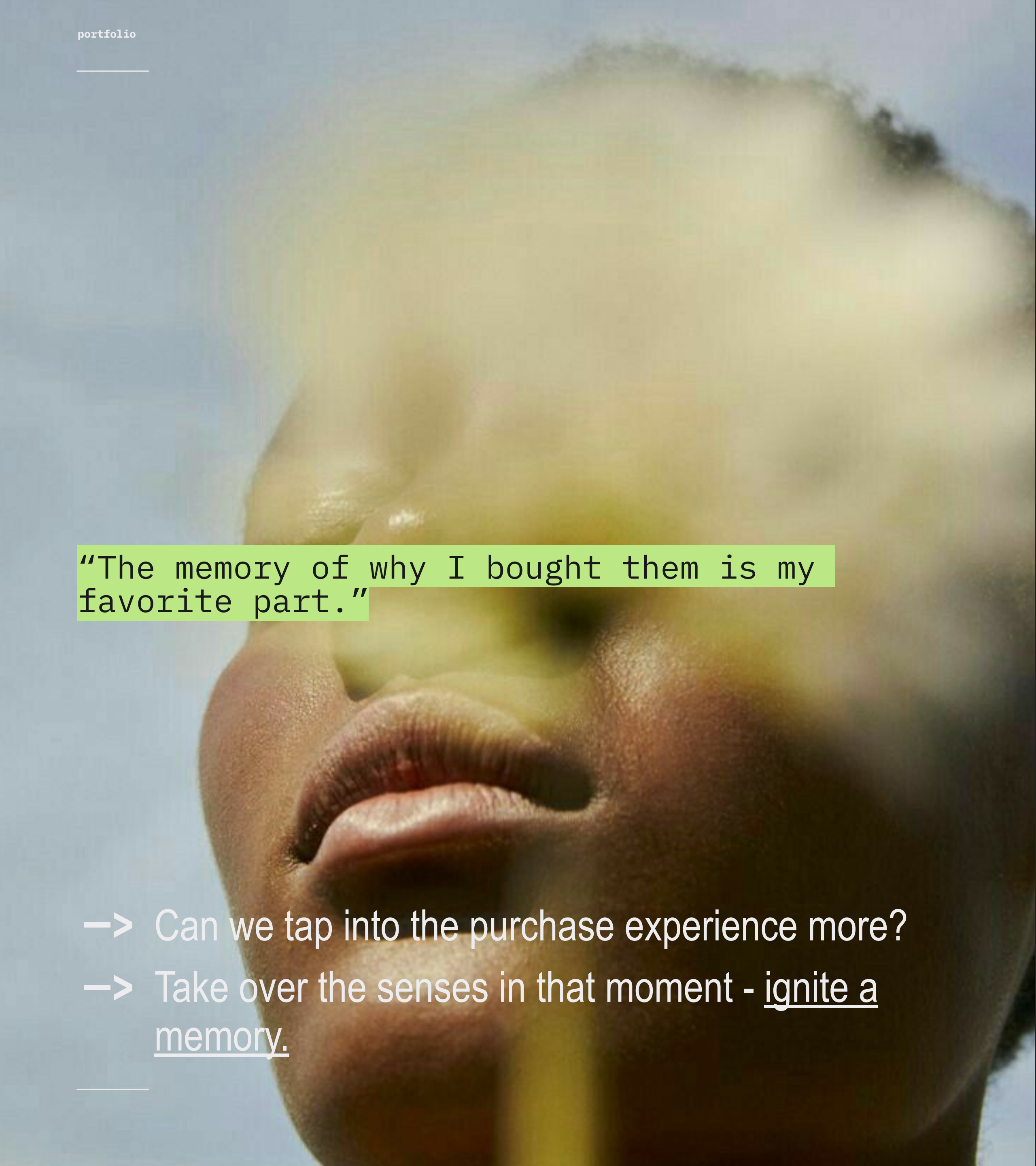
→ A more intimate/purposeful relationship emerging.



02.2

VOICE OF GUEST

COMMENTARY



"The memory of why I bought them is my favorite part."

- > Can we tap into the purchase experience more?
 - > Take over the senses in that moment - ignite a memory.
-



"Don't make me a billboard."

- > Create something that celebrates who she is.
 - > Leave space for the self expression.
-

A photograph of a person lying on their back in a field of tall, green grass. The person is wearing a light blue long-sleeved shirt and red pants. The background shows rolling hills under a bright blue sky with scattered white clouds.

"It's a privilege to be able to feel like this."

- Enabling feel.
- Identify euphoric moments in lifestyle.

A photograph of a person wearing a bright blue, quilted puffer jacket with the hood pulled up over their head. They are also wearing white-rimmed sunglasses. The background is a plain, light-colored wall.

"It's comfort in the chaos - it's life."

- These are tools used to navigate life.
- Nurture in day to day.

02.3

VOICE OF GUEST

ANTICIPATED FEEL STATES

NURTURED

→ Comfort in an accelerating world.

ENLIGHTENED

—> Confidence in an accelerating world.

03

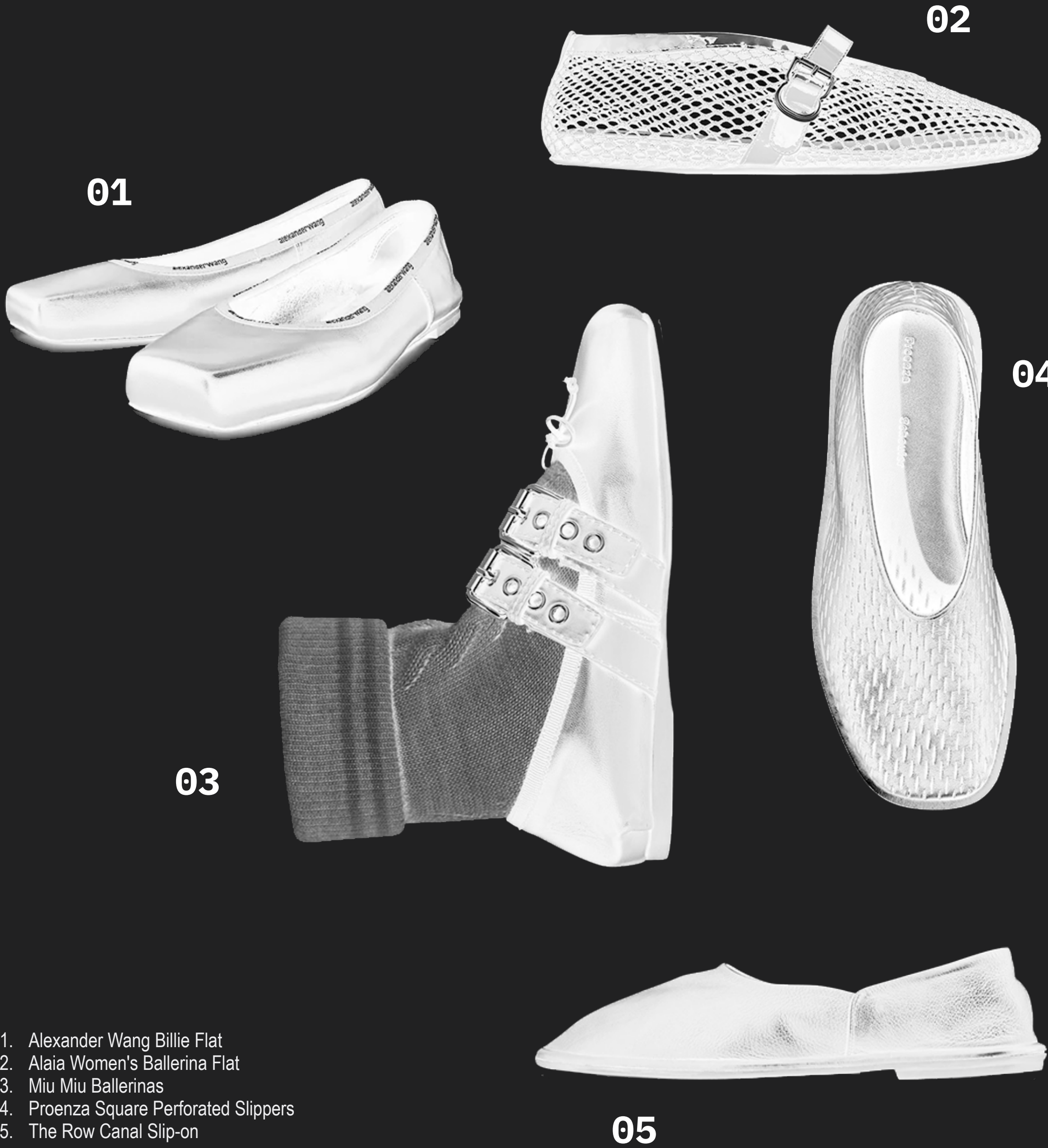
WHAT'S ON THE FEET

OBSERVATIONS IN FOOTWEAR
BEING WORN THROUGHOUT THE
CITY (**W/SOURCED BRAND IMAGERY)

FLATS



**** Heavily saturated — signaling later adoption.**



- 1. Alexander Wang Billie Flat
- 2. Alaia Women's Ballerina Flat
- 3. Miu Miu Ballerinas
- 4. Proenza Square Perforated Slippers
- 5. The Row Canal Slip-on

URBAN PROTECTION

*Balance with demands of region - NYC is very elements-driven.

1. Roa Cingino
2. Moncler Trailgrip knit high top sneakers
3. Maguire Beja all-season sneakers
4. Dior Homme low-top sneaker
5. Roa Unique Loafer

**** Not 'Gorp-Core' — getting the most out of purchase.**



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LOW - PROFILE



****** Remains to be seen heavily in Men's.



01



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- 1. Dries Van Noten Sueded Sneakers
- 2. Ralph Lauren Suede Pony Ballerina
- 3. Miu Miu x New Balance 530 SL
- 4. The Row Cary Loafer
- 5. Isabel Marant Beth Sneaker

REBELLIOUS INTERPRETATION

- 1. Alaia Women's Criss Cross Ballerina Flats
- 2. Isabel Marant Belna Ballet Flats
- 3. Proenza Glove Mary Jane Ballet Flat
- 4. Jeffrey Campbell Dancer SPK
- 5. Alexander McQueen Punk Ballet Flat

** Expression in an adopted space.

01



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04

MARKET AESTHETICS

PRESENT AND EMERGING

WORN AND GROUNDED (*PRESENT)

- Safe.
- Identity signaling.



NEW UNIFORM (*EMERGING)

- > Minimal.
- > Sophisticated.



05

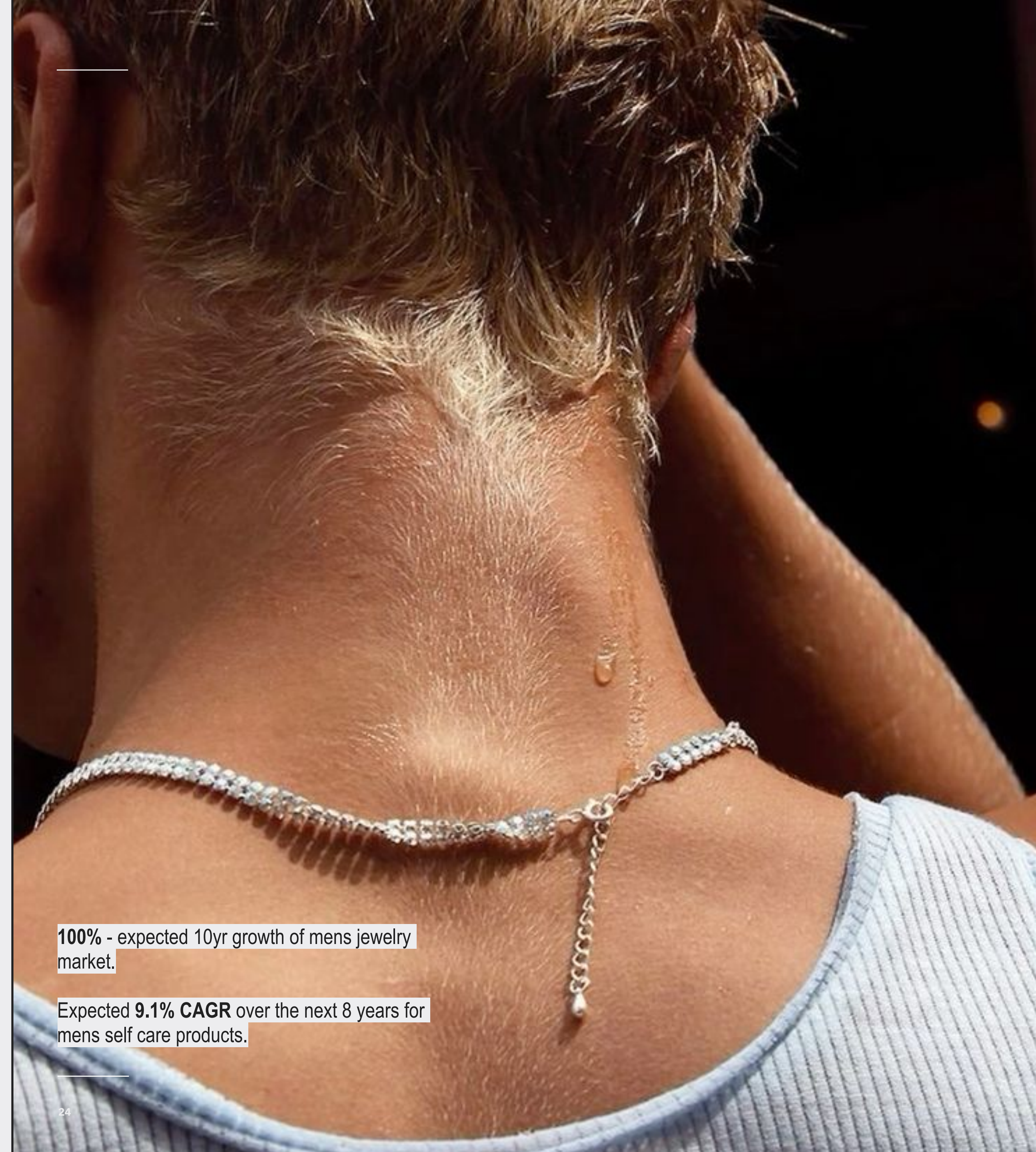
MARKET MOVEMENTS

*BASED ON MARKET INSIGHTS AND
CULTURAL DIRECTION*

ORNATE MASCULINITY

Cinematic portrayals and the increase in videos focused on outfitting and 'glow-ups' on platforms like TikTok and Youtube are driving the male consumer to adopt more personalized and expressive looks.

—> Meet the male Guest where they *want* to be.



100% - expected 10yr growth of mens jewelry market.

Expected 9.1% CAGR over the next 8 years for mens self care products.



60% industry average sell-thru rate.

Inventory and profit-loss due to incorrect sizing can reach 20% of revenues in some cases.

44% of Gen Z already believe gender is not binary.

SKIMS

BEYOND BINARY BUSINESS

With market expectations increasing and trend cycles compressing, companies will soon face stronger incentives to embrace gender-neutral offerings to maximize profits while minimizing resources.

—> Telling a story for both can be an advantage.

CALCULATED DISRUPTION

If you were to start this business from scratch - what would you do differently? Technology is advancing, our industry is aging, and disruption is coming.

→ Remember why we are here.



SpaceX reimagined rockets as reusable vehicles.

Vertical integration and reusability has reduced the cost of space travel by over 90% in just a matter of years.

A man with a mustache, wearing a green cap with "SAINT MARGARET WOOD" on it, a blue button-down shirt over a white t-shirt, and blue trousers, is walking towards the camera in a dark tunnel. The tunnel has a brick wall on the right and a stone floor. A large green box with the word "RESULTS:" in bold black letters is overlaid on the image.

RESULTS:

As of Q3 2024.

JACOB ELORDI

Each lifestyle model briefed for FW26 sited the contents of this presentation.

The model assortment for FW26 shifted from a 2:1 Performance-Lifestyle split to a 4:1 Lifestyle-Performance split — **seeing benefit in treating the lifestyle assortment like a performance category.**

Two models were adjusted to account for both men and women across the same design language in this season — **realizing shared opportunity in Men's.**

This presentation was successfully used as a point of reference to our Senior Leadership team in advocating for future insights opportunities across lifestyle *and* performance categories during cost-savings.

