

AlixPartners

FDRA

DATA PACK

Back-to-school footwear survey

JULY 2025



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Survey overview



Dates administered

June 3-10, 2025



Population

1,042 adults (ages 15 and above)

U.S. footwear consumers who intend to shop for back-to-school footwear for children of all ages across all regions, demographics, and income levels



Method

Online

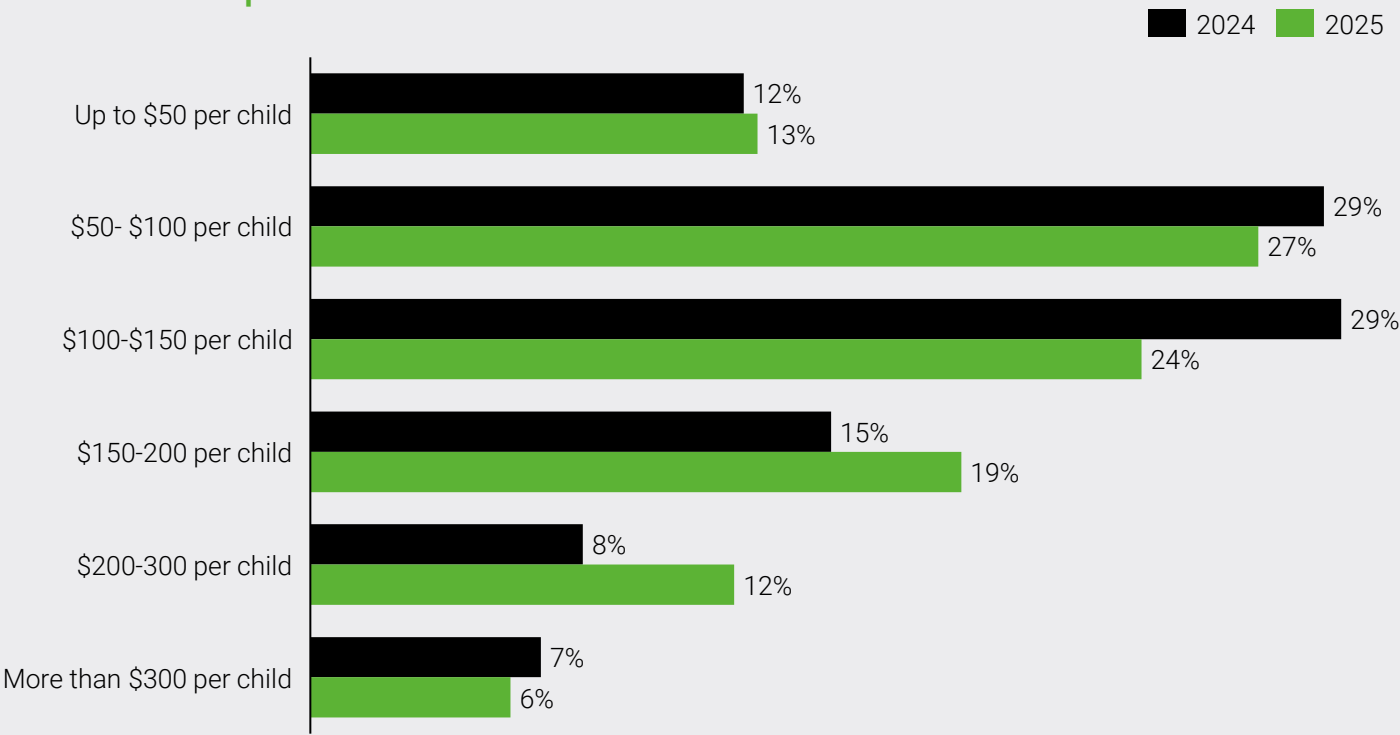
Purpose

To gain insight into consumer footwear shopping habits and channel and product preferences, and to consider their impacts on operations

Consumers estimate spending \$50-150 on shoes per child. About a quarter of consumers are starting back to school shopping in June

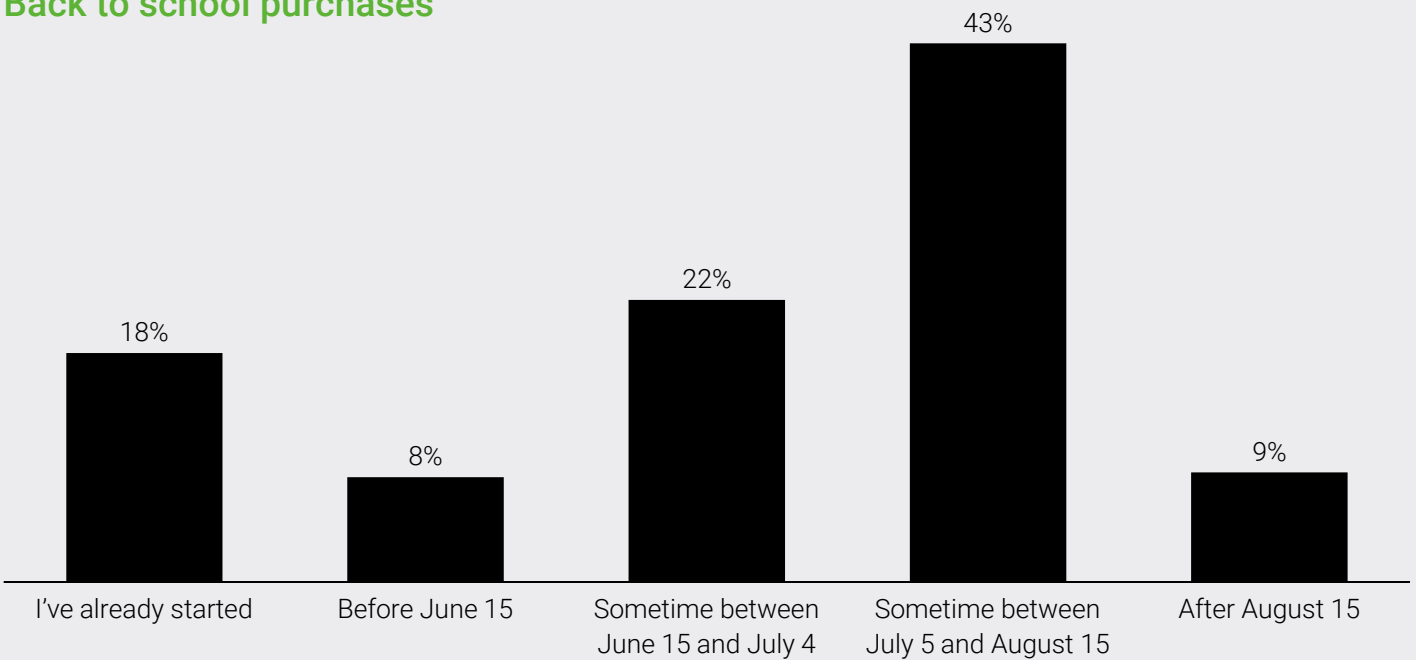
Estimated spend per child: 2025

Back to school purchases



When consumers intend to start shopping

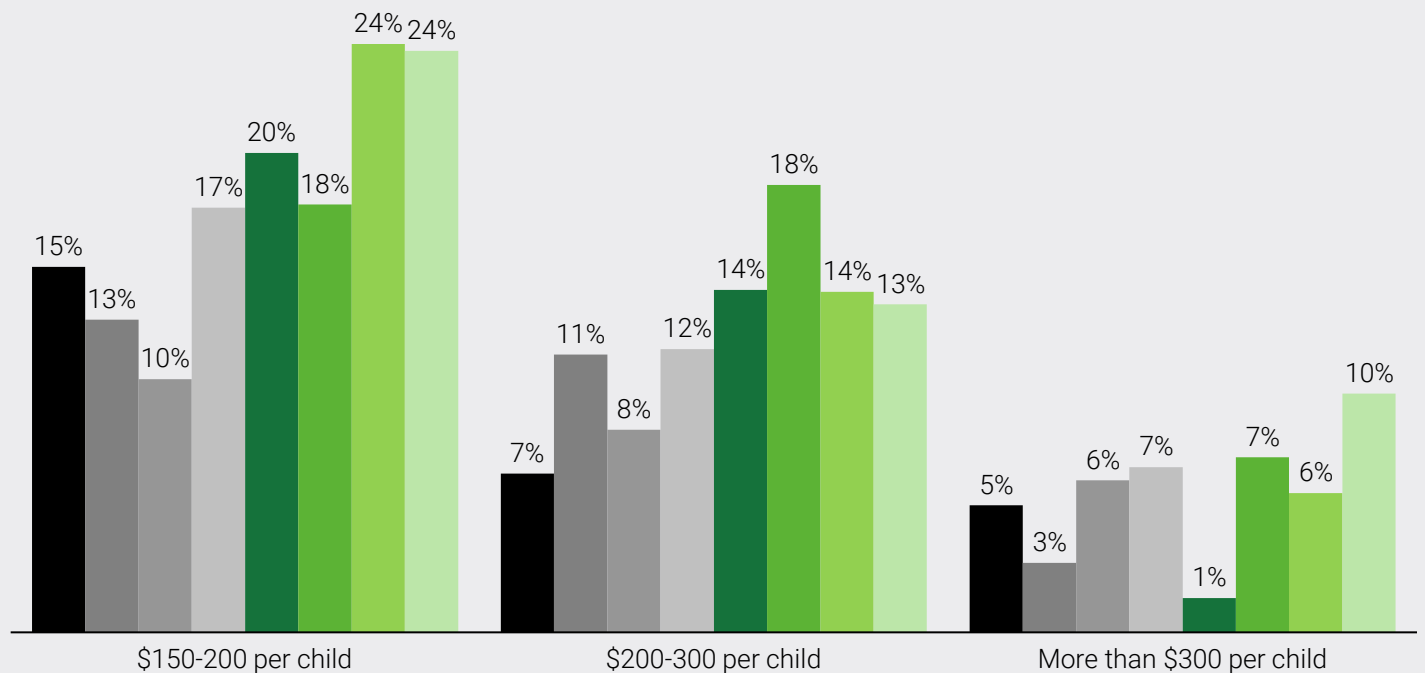
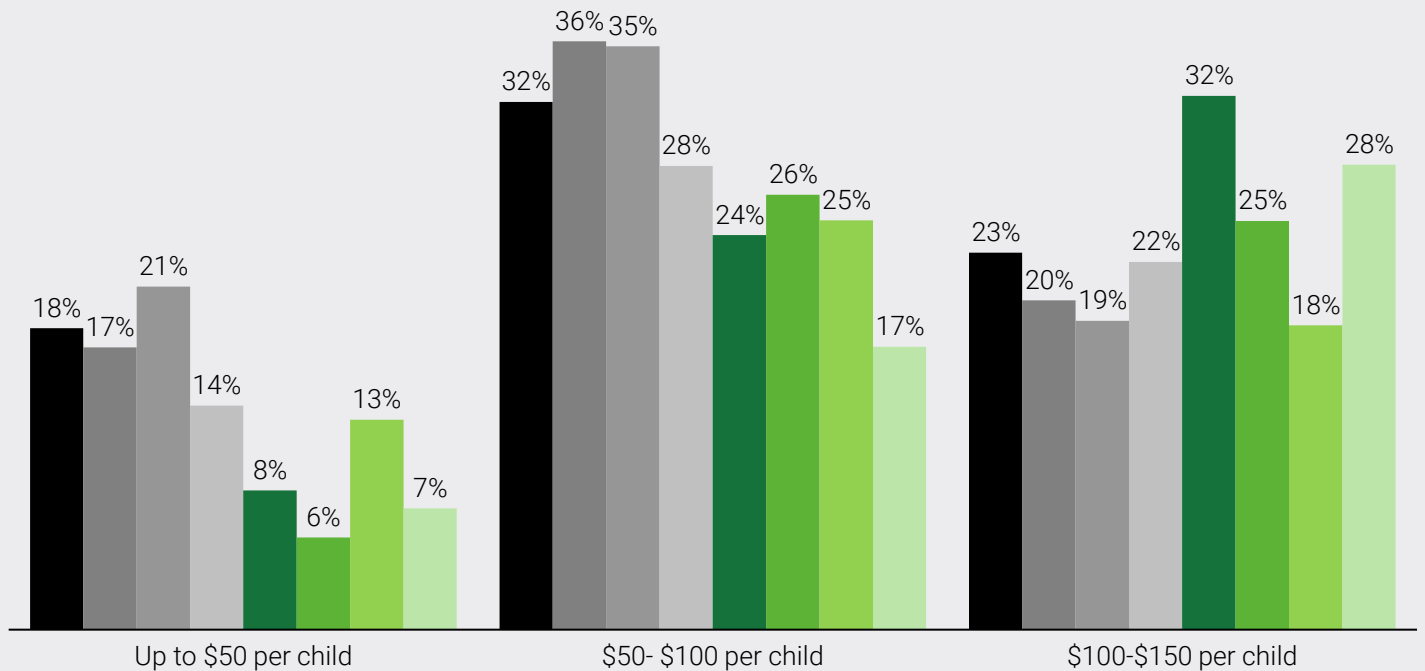
Back to school purchases



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Estimated spend per child: by income level

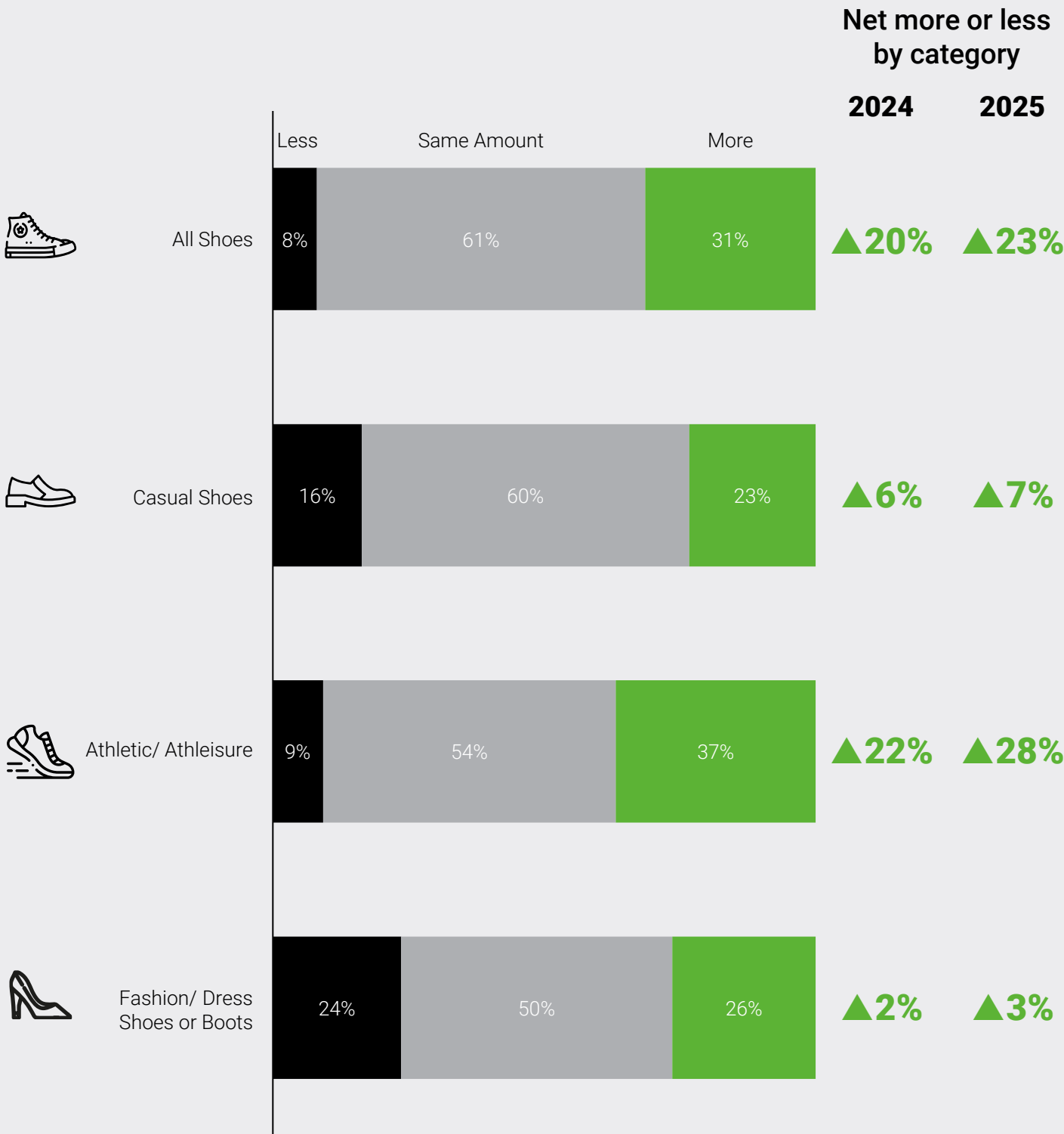
Back to school purchases



Under \$25,000 % \$25,000 - \$34,999 % \$35,000 - \$44,999 % \$45,000 - \$59,999 % \$60,000 - \$74,999 % \$75,000 - \$99,999 % \$100,000 - \$149,999 % \$150,000 or more %

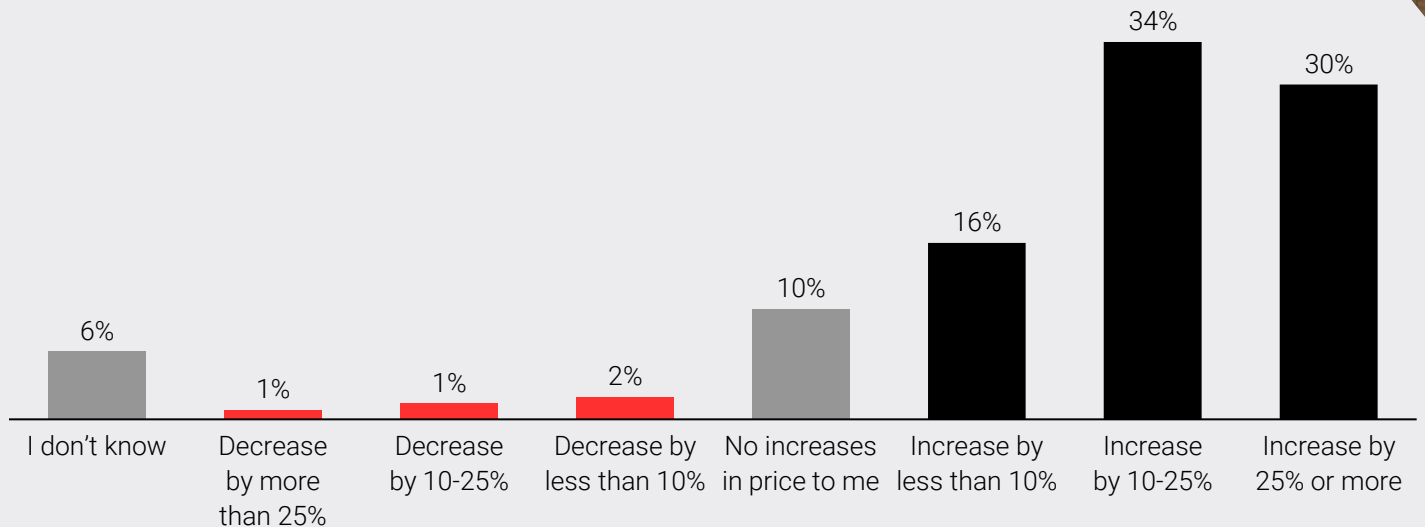
Similar to last year, consumers expect to spend more on athletic shoes than other categories, with an estimated net increase of 28%

Estimated spend by category
Back to school purchases



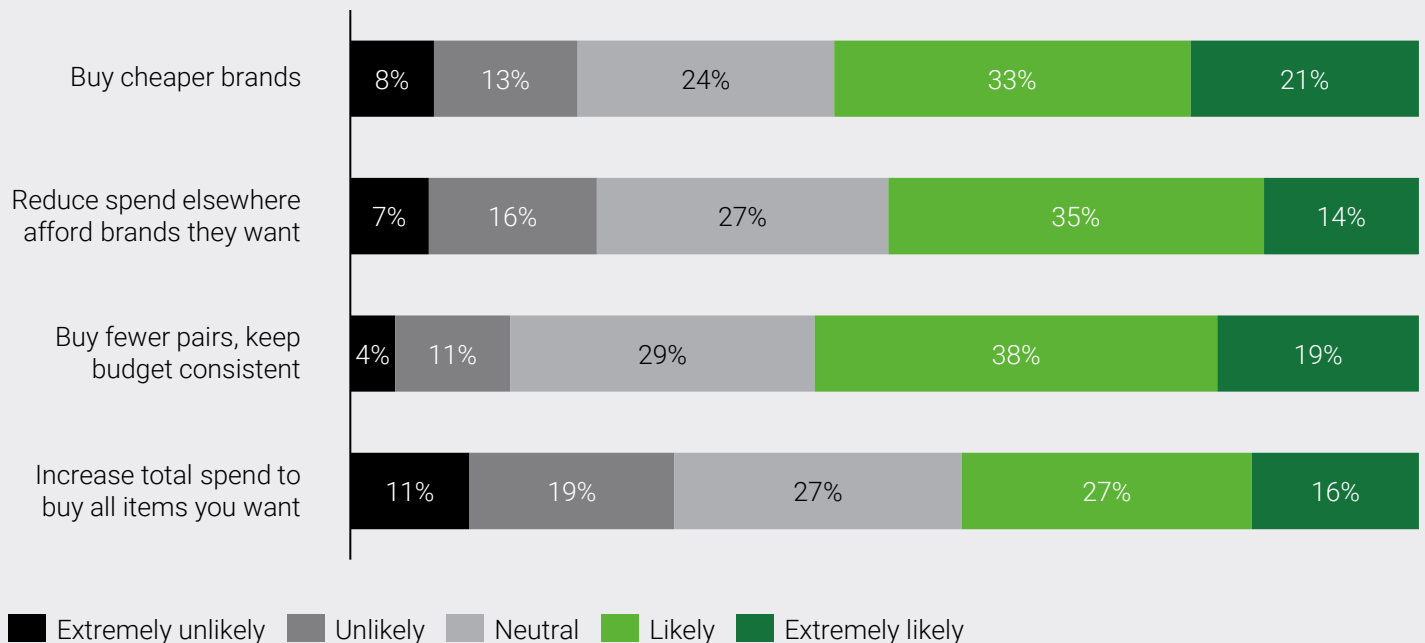
Half of all consumers expect prices to increase, but that brands and retailers will be absorbing at least a portion of cost increases

Given a 25% tariff: consumer-expected price increases
Back to school purchases



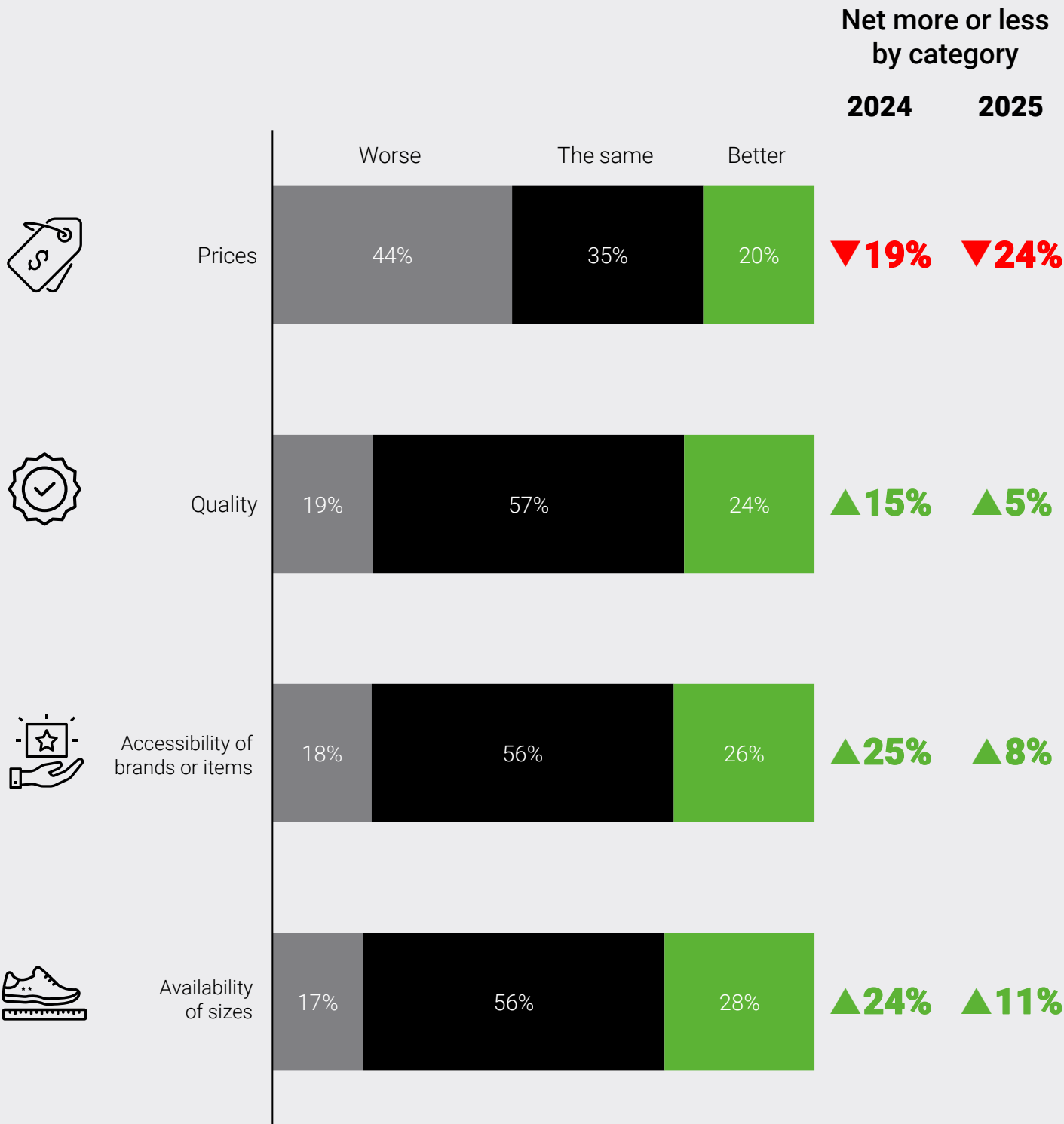
With anticipated price increases consumers are most likely to cut back on pairs and switch to lower cost brands

Given a 25 to 30% price increase: anticipated consumer response
All future shoe purchases



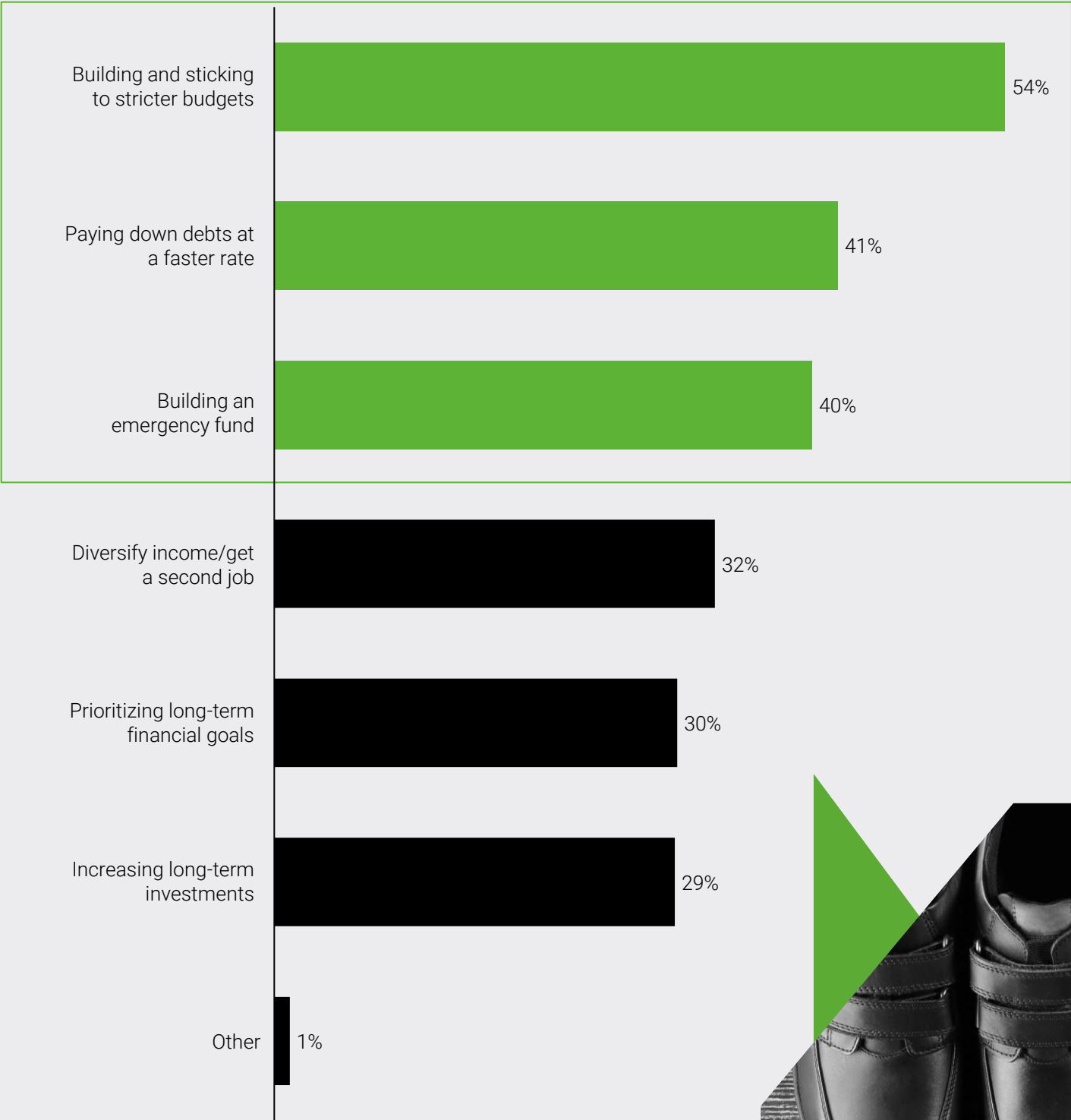
Consumers highlight that brand and item accessibility, and size availability has improved overtime; prices have not

Customer perception of products in the last 5 years
Back to school purchases



In current economic conditions, consumers are planning stricter budgets and are focused on reducing debt and building savings- indicating discretionary categories could struggle to drive growth

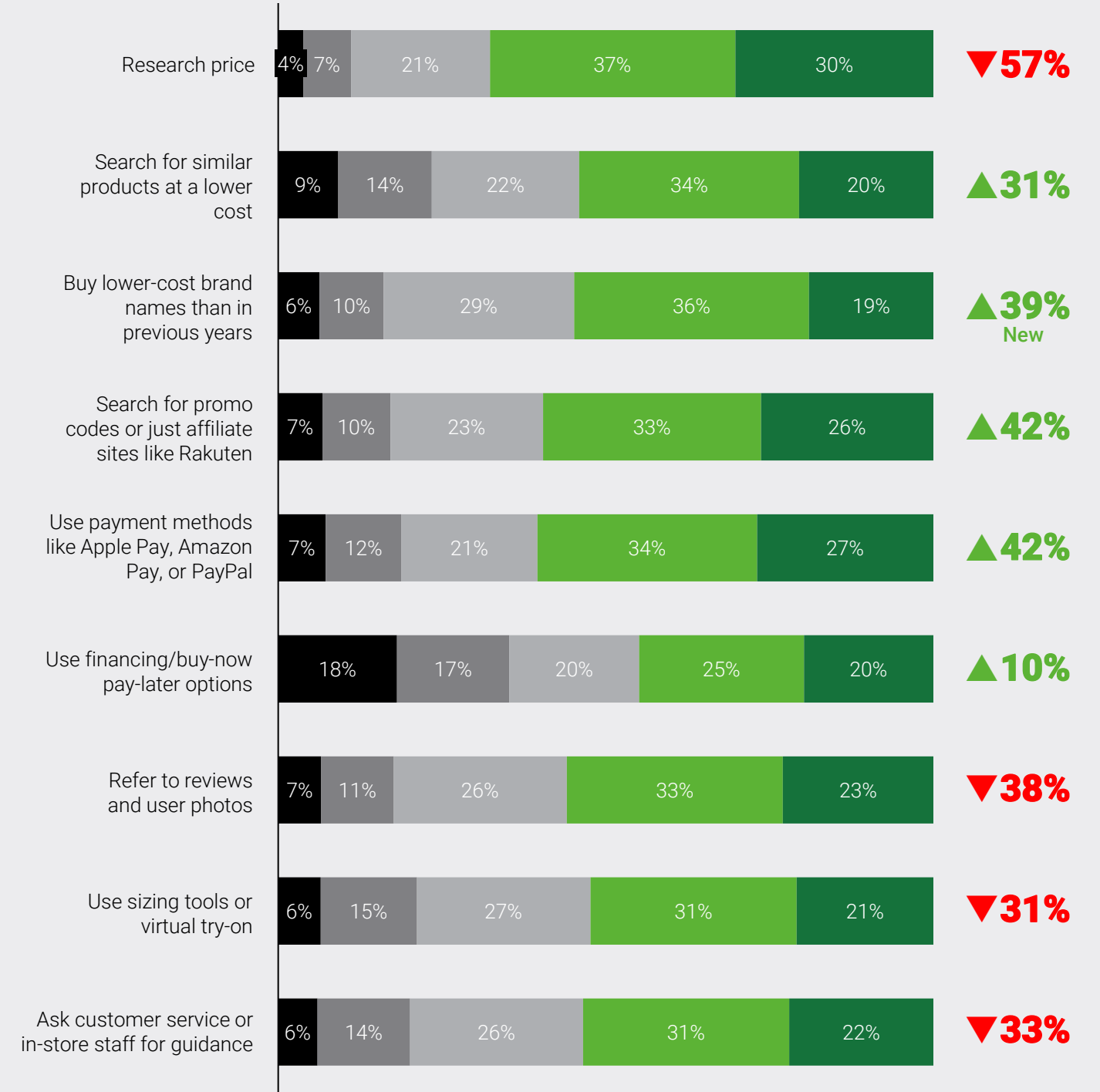
Planning changes in financial behavior
Back to school purchases



Back-to-school shopping consumers are even more likely to engage in cost-savings activities and care less about experiential factors than in previous year

Likelihood to engage in these shopping behaviors
Back to school purchases

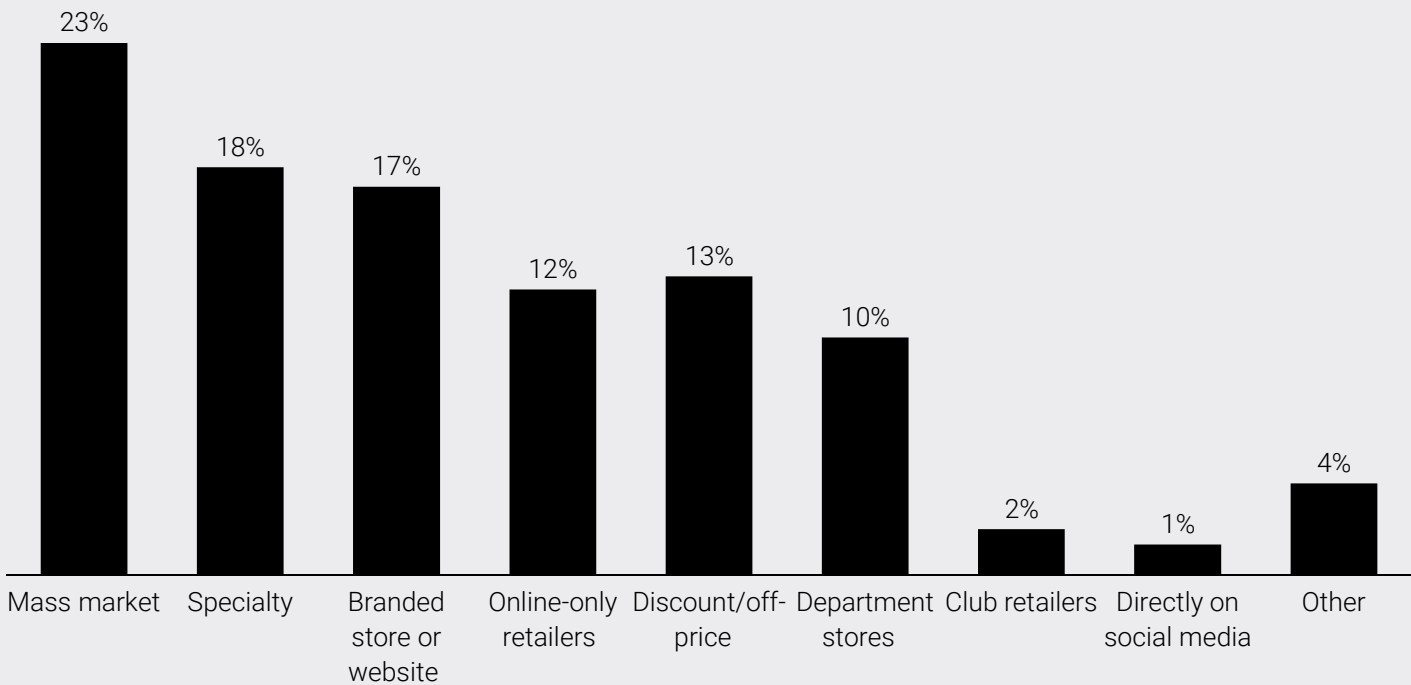
Net more or
less to LY



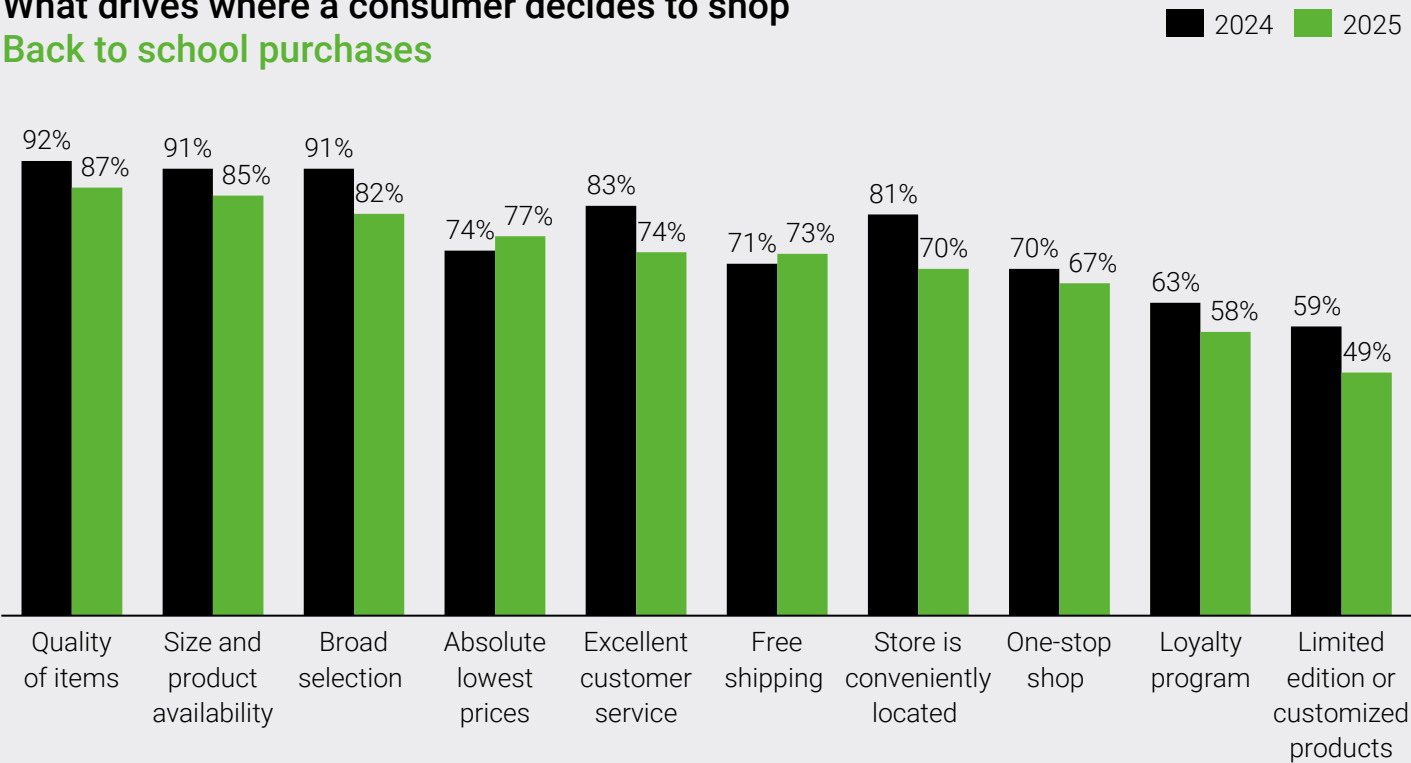
Extremely unlikely Unlikely Not sure Likely Extremely likely

Citing quality and availability as key drivers, consumers are most likely to purchase at mass retailers, followed by specialty or branded stores

Types of retailers consumers will shop at
Back to school purchases

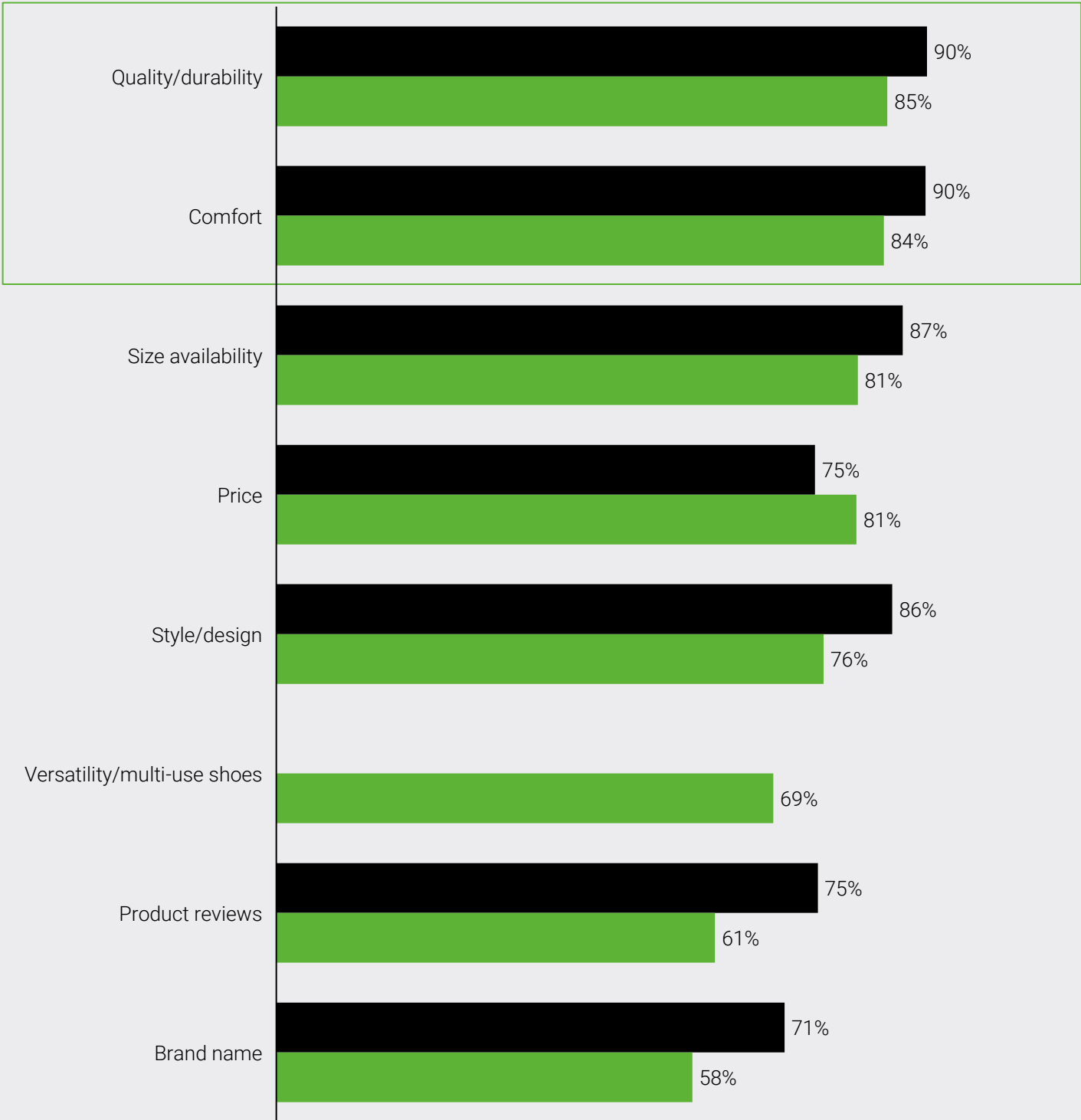


What drives where a consumer decides to shop
Back to school purchases



When selecting which products to buy, consumers indicate that quality and comfort drive back-to-school purchases, despite previous surveys indicating the importance of brand

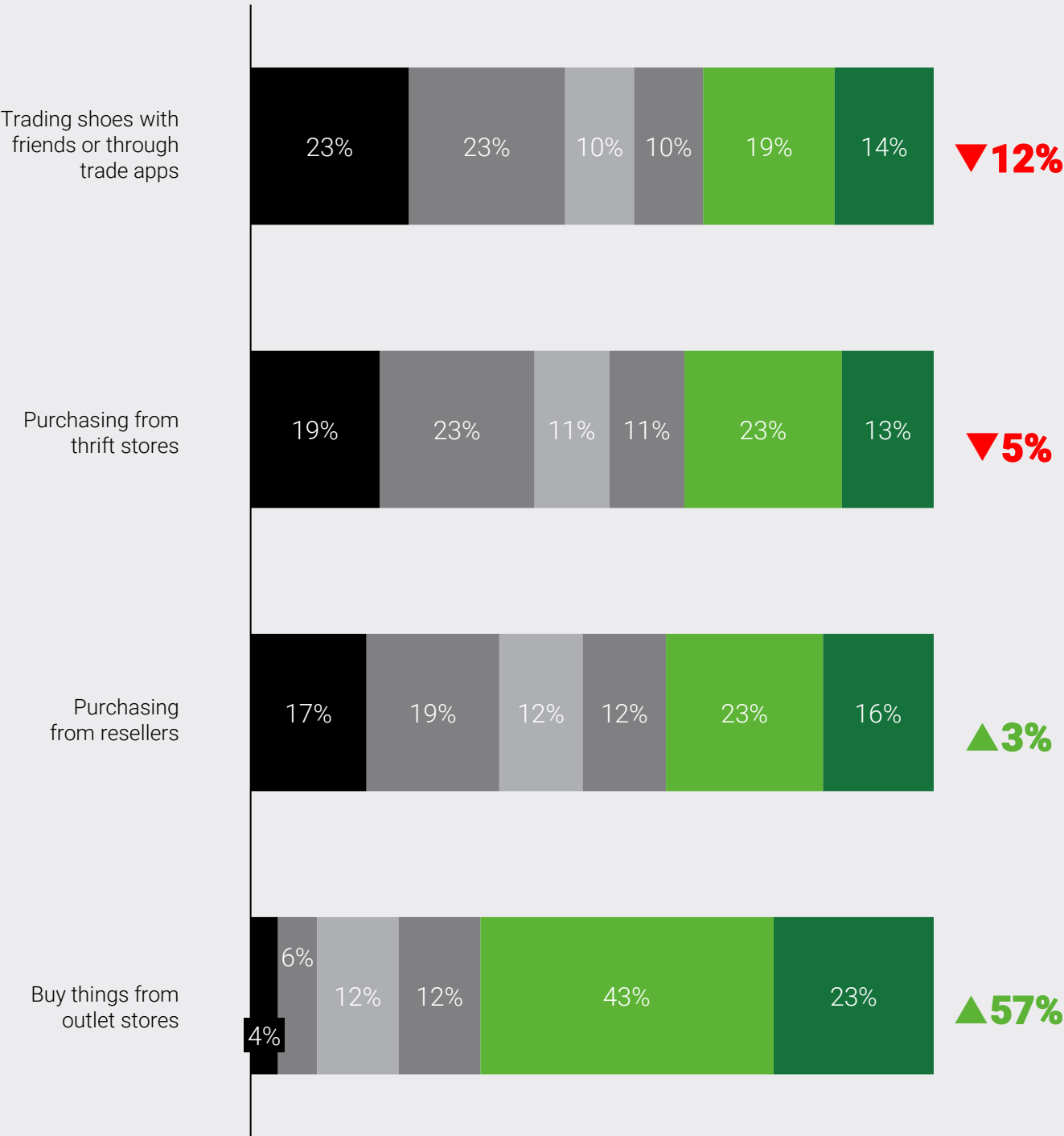
What drives what product a customer purchases
Back to school purchases- important & very important



Consumers are most likely to purchase at outlet malls or through resellers as opposed to purchasing gently used shoes from thrift stores or trading stores or trading apps

Net likelihood of consumers to purchase
Back to school purchases

Net more or less
by category



Extremley unlikely Unlikely Not sure Likely Very likely

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FDRA



ABOUT FDRA

FDRA is governed and directed by footwear executives and is the only trade organization focused solely on the footwear industry. Serving the full footwear supply chain, it boosts its members' bottom lines through innovative products, training, consulting on footwear design and development, sourcing and compliance, trade and customs, advocacy, and consumer and sales trend analysis for shoe retailers around the world. FDRA supports 500 companies and brands worldwide, representing 95% of the total U.S. footwear industry.

ABOUT ALIXPARTNERS

For more than forty years, AlixPartners has helped businesses around the world respond quickly and decisively to their most critical challenges—circumstances as diverse as urgent performance improvement, accelerated transformation, complex restructuring and risk mitigation.

These are the moments when everything is on the line—a sudden shift in the market, an unexpected performance decline, a time-sensitive deal, a fork-in-the-road decision. But it's not what we do that makes a difference, it's how we do it.

Tackling situations when time is of the essence is part of our DNA—so we adopt an action-oriented approach at all times. We work in small, highly qualified teams with specific industry and functional expertise, and we operate at pace, moving quickly from analysis to implementation. We stand shoulder to shoulder with our clients until the job is done, and only measure our success in terms of the results we deliver.

Our approach enables us to help our clients confront and overcome truly future-defining challenges. We partner with you to make the right decisions and take the right actions. And we are right by your side. When it really matters.