

AlixPartners

FDRA

U.S. CONSUMER & EXECUTIVE FOOTWEAR SURVEY

And the winning shoe is ... something casual

Consumers are spending, but more carefully,
and their idea of 'casual' has shifted

SPRING 2026



Introduction

The squeeze is on for footwear companies and retailers in 2026



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For all the consumer anxiety in 2025 over tariff-related price hikes, footwear companies were “surgical” about where they raised prices last year—Bureau of Labor Statistics data [show](#) that the CPI for footwear increased only 1.8% YOY from February 2025 to February 2026, and was flat through 2025.

The latent price pressures being felt by retailers may exact more of a pinch in 2026, which started with a potentially ominous [2% rise in footwear prices](#) in January as the macro environment remained stormy and landed costs stacked up. **The Spring 2026 U.S. Consumer Footwear Survey**, conducted by AlixPartners in partnership with FDRA, finds widespread sticker shock and pessimism over the anticipated state of the economy in six months’ time, especially among older respondents. As we zoom in on the data, it’s not a question of which categories will be the bright spot, but which categories will suffer the least as consumers retreat to needs-based spending and work to make each purchase go further.

For the first time, the research is enhanced by the results of the [FDRA Q1 Shoe Executive Business Outlook Survey](#) results, providing a dual-level read on the footwear industry.

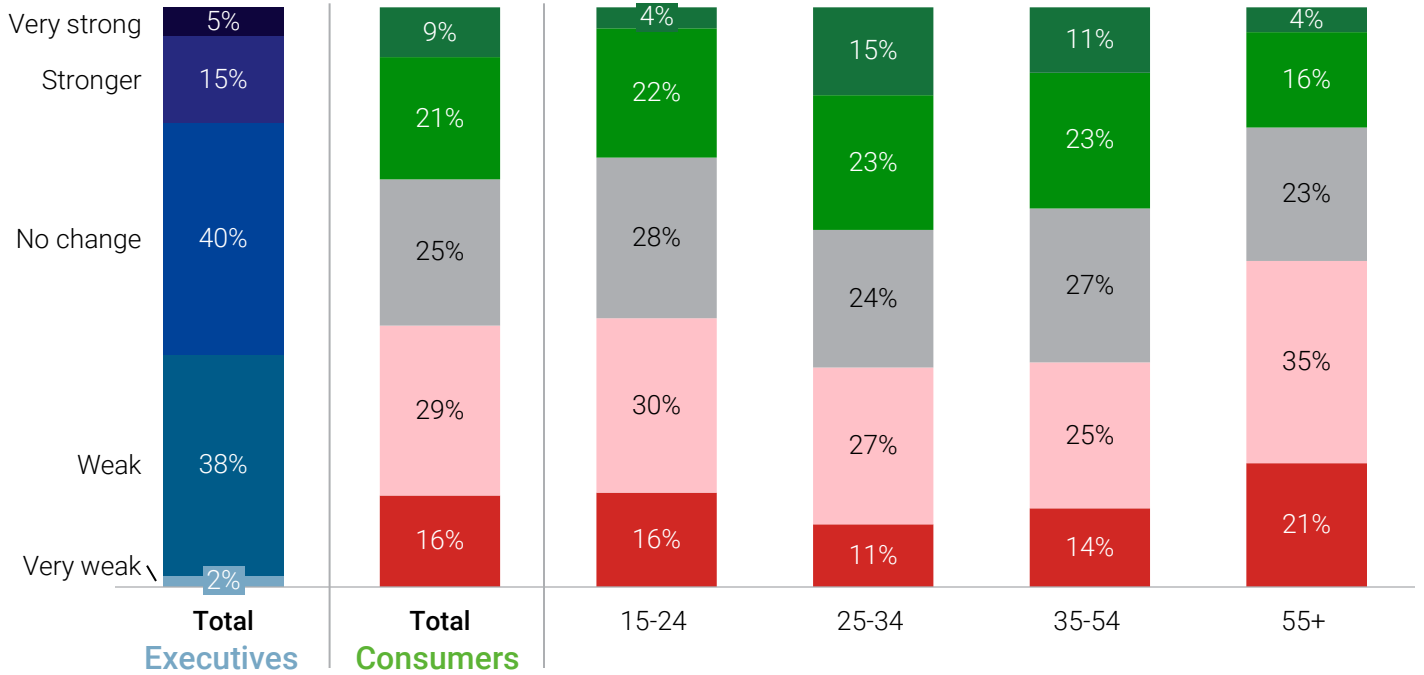
Casuals are the most resilient category, with a projected 1% net decline in purchase intent, though there is perhaps a semantic difference between the consumer idea of casual and that of the industry. Among respondents who said they would be spending less on shoes, the top reason was that they were buying shoes that can work for multiple occasions—cited by more than a third. Anything becomes casual when you wear it day-in, day-out.

This is the footwear-specific expression of retail's broader challenge: price increases can no longer mask declining sales volumes. The economics of low-margin retail demand genuine volume growth, not just mix shifts and sticker price increases. Forty-five percent of consumers expect economic conditions to deteriorate over the next six months, ahead of the slightly more unflappable executive survey score of 40%. We fielded a pulse survey in mid-April and found 6 in 10 consumers had negative sentiment around the economy.

Price was the top purchase factor and the top reason for abandonment

Executives are slightly less pessimistic than consumers about the months ahead

ECONOMIC OUTLOOK OVER NEXT 6 MONTHS: EXECUTIVES AND CONSUMERS BY AGE



Consumer sentiment update (April 2026)

Since March consumer sentiment has taken a significant turn for the worse. Now 61% of consumers expect the economy to be weak or very weak in the next 6 months up 16 pts to the previous month

This report provides insight on some priorities and strengths among consumers in this tricky environment.

Casual footwear showed the greatest strength, cited as a “must-buy” by half of respondents, with the above caveat around the category definition. More than 9 in 10 respondents will purchase a pair of casual shoes, while fashion or dress shoes have the least staying power. We expect broader trends (ongoing economic uncertainty) will support this dynamic.

As retailers look to innovate and solve the perennial fit problem, we see little consumer trust in newer AI fit tools; price comparisons and user reviews are more important to conversion. That shouldn’t discourage innovation with AI. Rather, retailers should not feel compelled to chase the shiny new thing when they can achieve better inventory forecasting or back-office efficiency as the consumer prioritizes “affordable in-stock” options.



TOP THREE REASONS CONSUMERS ABANDON A PURCHASE



67%

Cost of item
Decreased by 11 pps



34%

Item not on sale
Decreased by 25 pps



65%

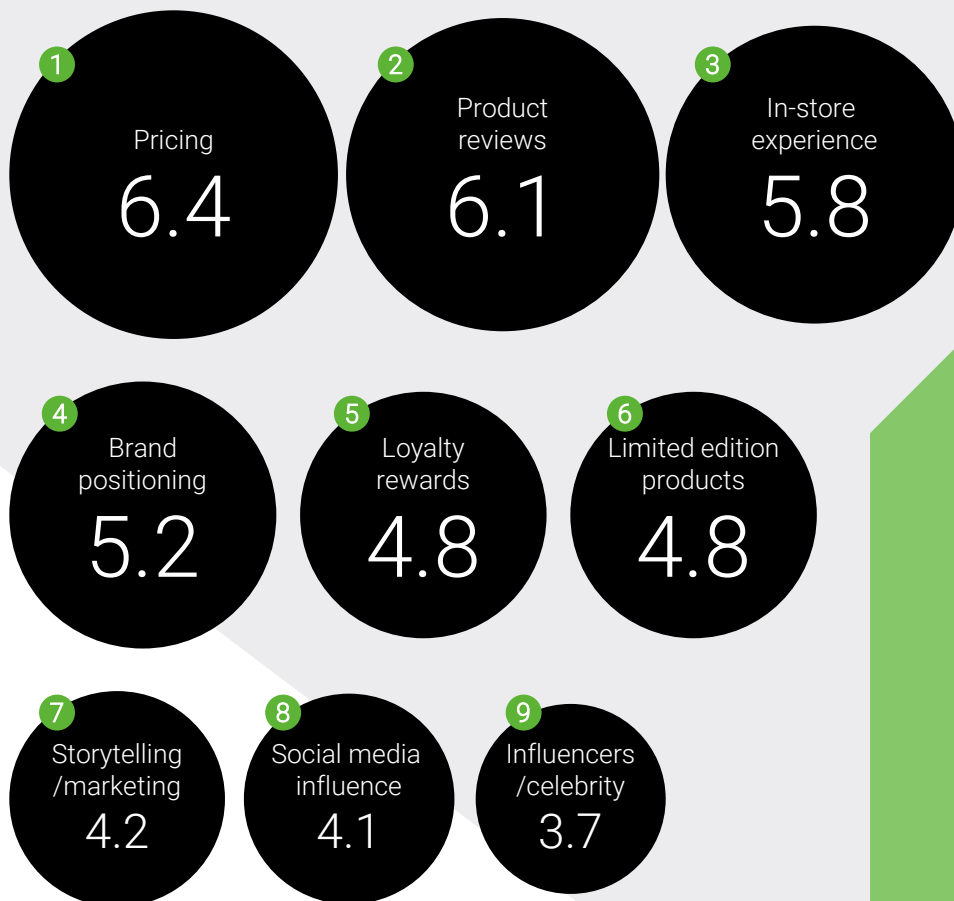
Size out of stock
Increased by 31 pps

As we look across data on in-store versus online purchases, the overriding theme is that consumers want the right-fitting pair as soon as possible. In-store purchasing is more prominent than online, likely due to fit issues, and expectations around speed for home delivery are higher than those for other categories of retail.

In the mind of the consumer, price beats out fancy marketing plans, influencers, and limited product drops, and underscores the difficulties of making bets based around the next "big shoe" given long lead times for manufacturing and the fickleness of a consumer who is making purchases based around need in the moment.

MOST INFLUENTIAL IN DETERMINING WHAT TO BUY

Score based on rankings



It all adds up to a price-sensitive consumer who is making trade-offs, comparing prices online and making the trip to a store to get it right—"it" being a shoe that can fulfill multiple purposes for them and provide comfort above all. It's a lot to juggle.

Let's go into more depth.

Table of contents

Key Finding 01	06
Demand is intact, but pricing has worn through the consumer	
Key Finding 02	14
The shiny new thing (AI) isn't as trusted as the shiny old thing (the Brannock)	
Key Finding 03	18
Consumers can't buy the shoe that isn't in stock	
Key Finding 04	20
Where to find the resilient consumer	

Demand is intact, but pricing has worn through the consumer wallet

There is sticker shock across the board. Consumers say price is the #1 influencer of what they buy and the #1 reason for purchase abandonment. Even among those who intend to spend more in the category, there isn't an appetite to buy more pairs—only an acknowledgement that the pairs they do buy will cost more.

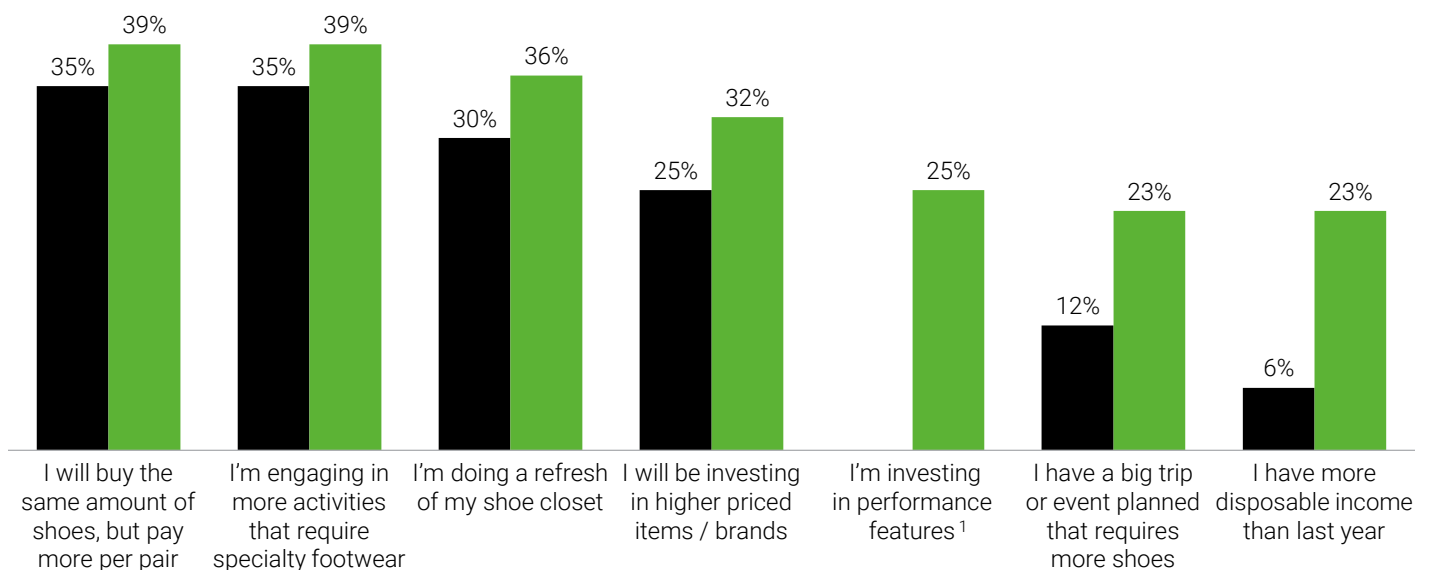
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The relative strength of the casual shoe, couched in consumer terms like a 'shoe that works for multiple occasions' and a focus on 'durability,' suggests a slippage in the category amid a spending squeeze and opens the door to bigger questions around how brands and models are positioned. If there are as many HOKAs on the marathon starting line as in the grocery store, how should they be merchandized?



Sonia Lapinsky
Fashion Retail Leader
Partner & Managing Director

MAIN DRIVERS OF CUSTOMERS SPENDING MORE

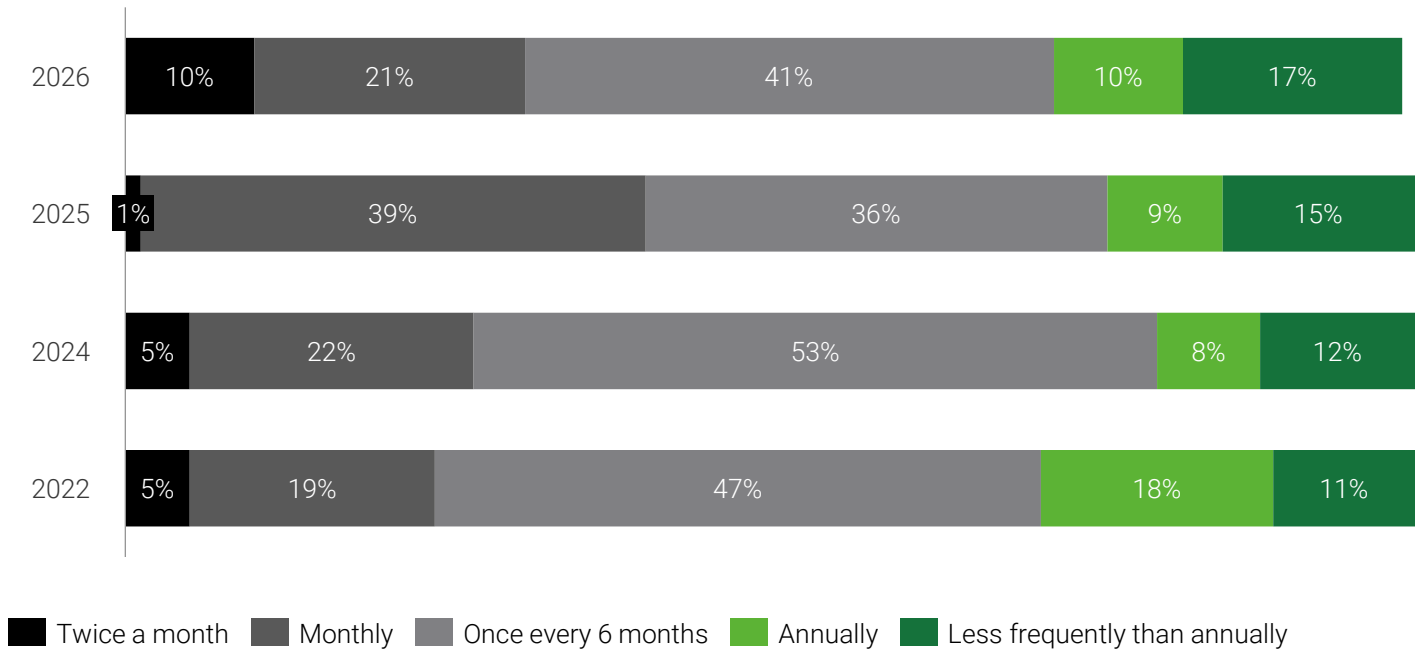


■ 2025 ■ 2026

1. New response option in 2026

At the same time, purchase frequency is ticking up, suggesting more trips but tighter baskets as consumers work harder each time to manage spend and find value.

FREQUENCY OF SHOE PURCHASES: SELF-PURCHASE



Footwear "demand" is intact—consumers still need and want shoes—but price fatigue and tariff-driven hikes are pushing consumers to walk away from purchases and trade down, leading to flat or negative unit growth and price-led revenue increases that mask underlying volume weakness.

So how can companies adapt and win in this environment? They should be conducting pricing and promo optimization, elasticity analytics, and margin diagnostics to restore volume without destroying margin. This requires brands be much more surgical—at both the product and timing level—on promotions.

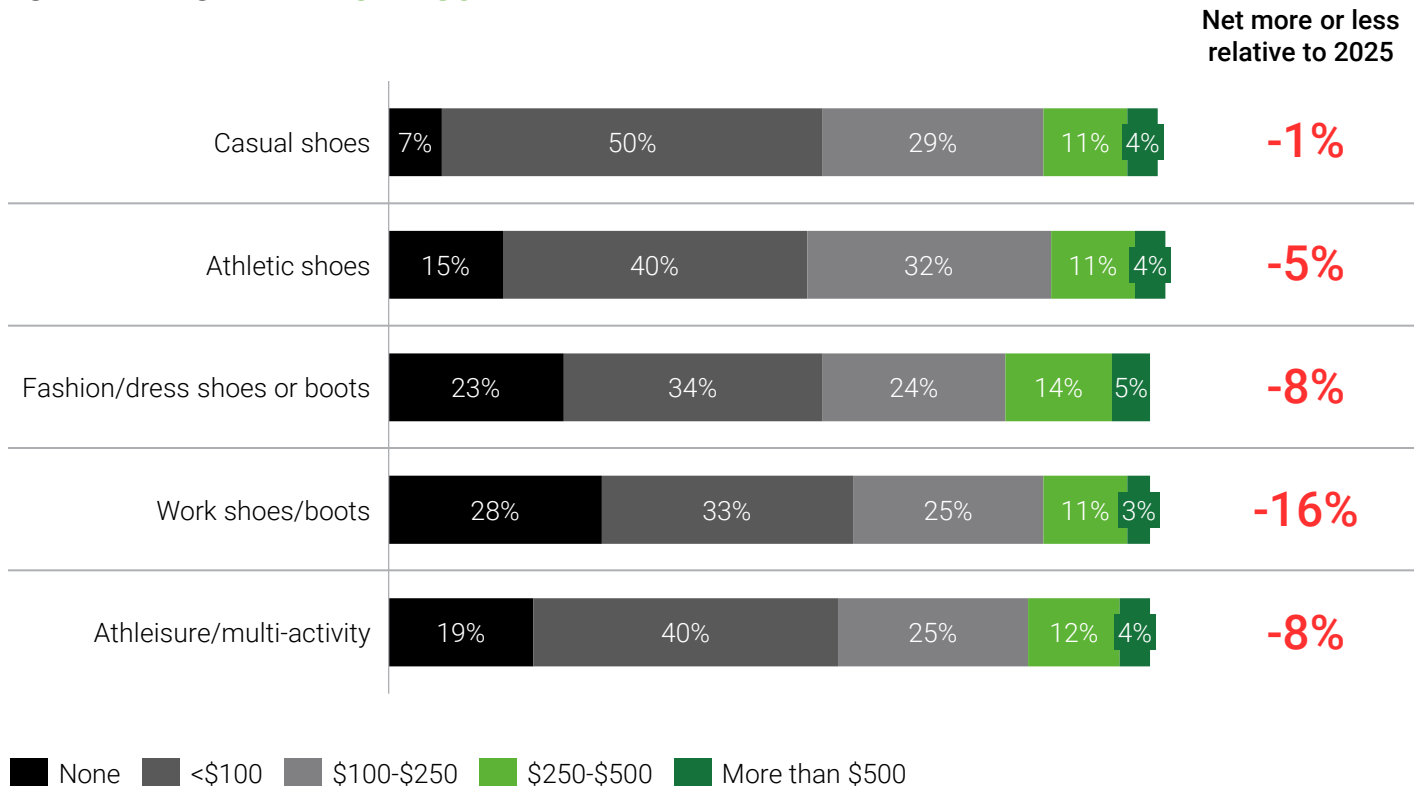
Additionally, products need to be marketed to highlight the price/quality relationship. Trusted sources like product reviews and influencers can help convey these messages.



'High-performance' means a casual shoe that can do it all

The message is clear: Consumers are focusing on more versatile and durable shoes. Casual shoes are the #1 must-buy for consumers, up 5 percentage points on last year. Additionally, consumers are prioritizing shoes that can be worn across multiple occasions—a top motivator for those who plan to spend less.

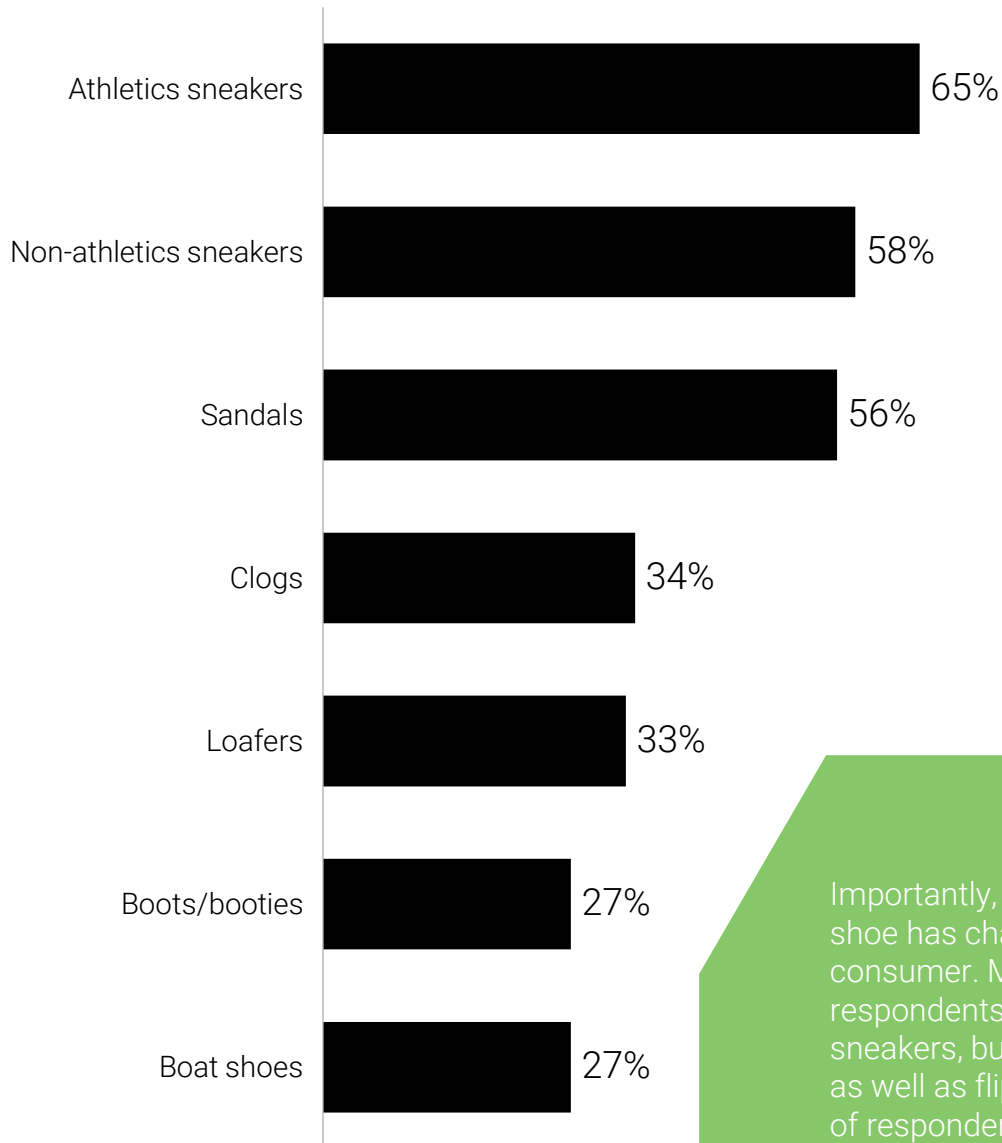
ESTIMATED SPEND BY CATEGORY



Cracking the new dress code

Casual means something different than it used to, and it's different for seemingly everyone

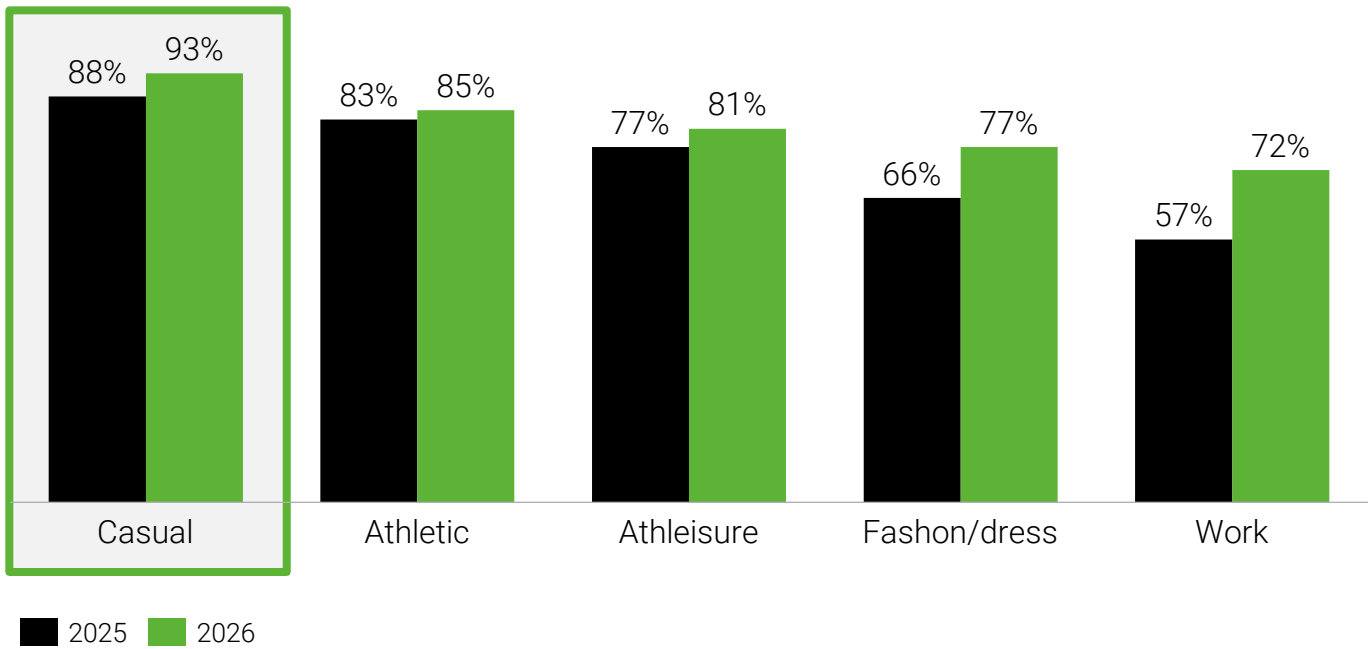
CONSUMER DEFINITION OF CASUAL BY SHOE TYPE



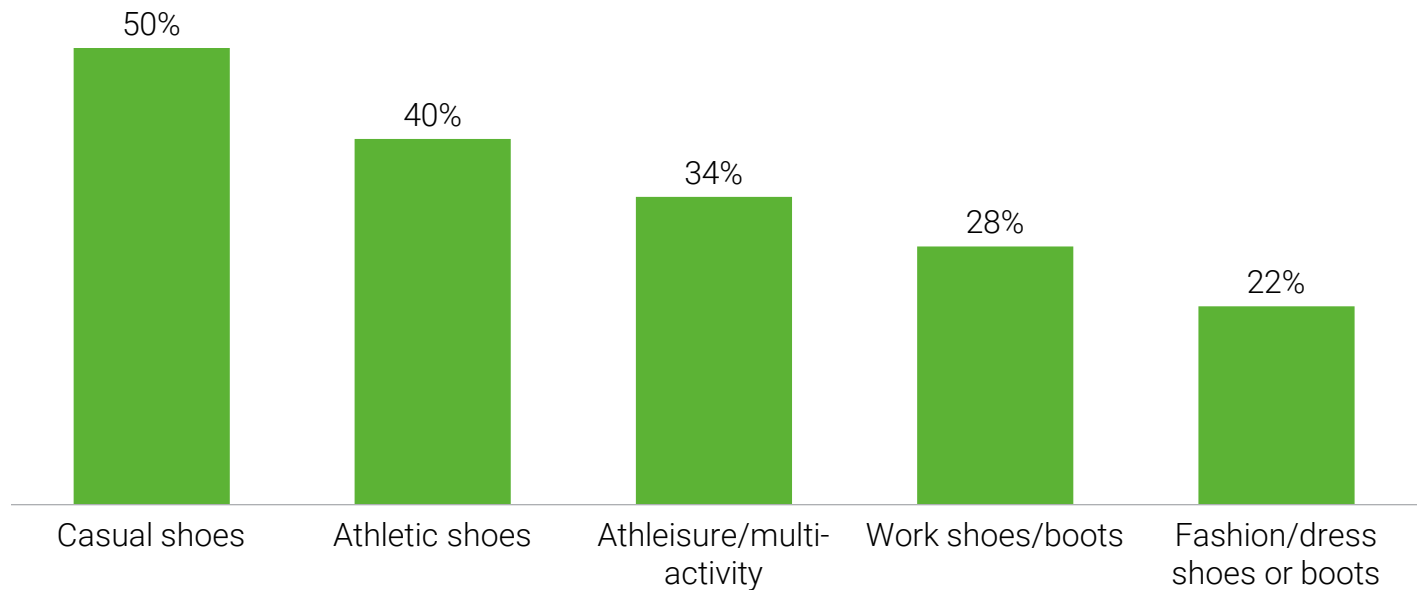
Importantly, the meaning of a "casual" shoe has changed over time for the consumer. More than half of respondents identify casual shoes as sneakers, but also non-athletic shoes, as well as flip flops and sandals. A third of respondents classify clogs and loafers as casual footwear. Slip-on sneakers fit the category for being athletic but easy to wear. It's a wide target, in other words, balanced on shifting ideas of functionality.



PERCENT OF CONSUMERS WHO WILL PURCHASE IN THE CATEGORY 2025 VS. 2026



PERCENT OF CONSUMERS WHO CONSIDER THE CATEGORY A MUST BUY



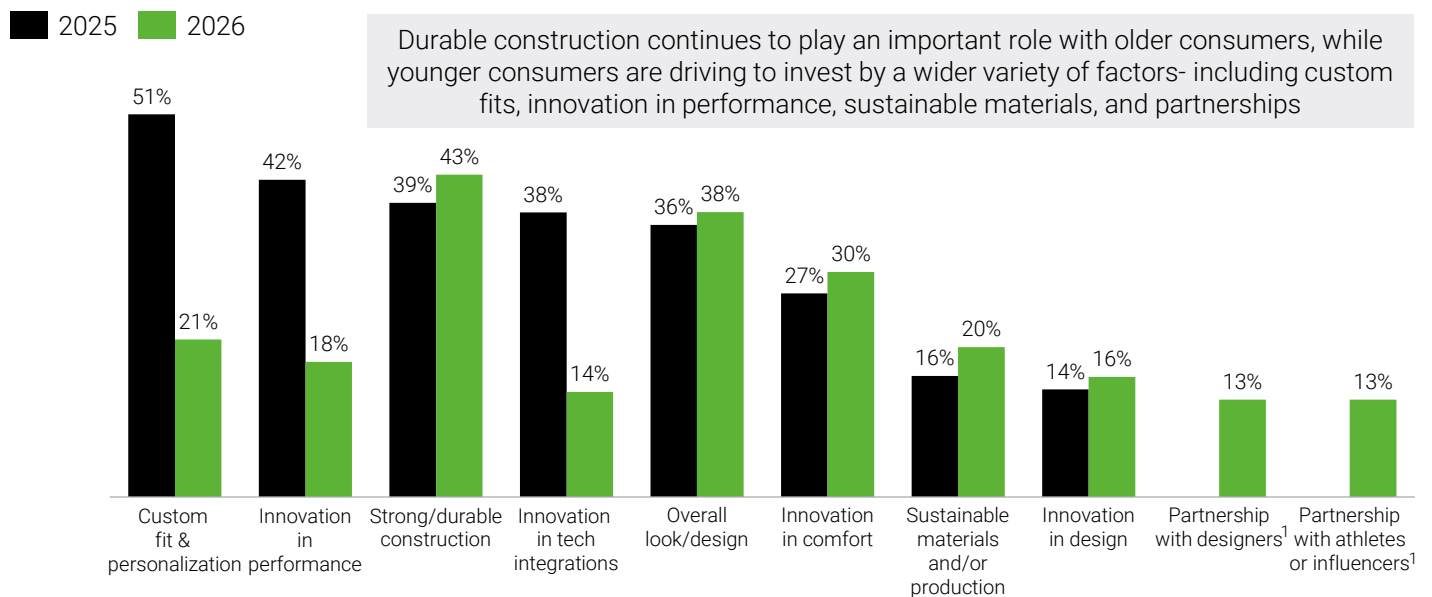
Of those who plan to spend more, the number one reason is footwear needs for specific activities.

Footwear is shifting from "want" to "need" in the consumer wallet. Growth is concentrating in versatile, casual styles that serve multiple occasions and offer comfort and performance, while dress or work and low-utility fashion categories soften further. There's a reason Nike sells [12 million Air Force 1s](#) each year.

This is the footwear version of differentiate to drive demand: the winners are brands and products that deliver clear functional benefits, not just aesthetic appeal. Consumers are making fewer, more intentional purchases and demanding that each pair work harder across use cases.

Of course, the athletic and wellness boom continues to bring people into gyms and onto the marathon course (2025 marathon participation was just below the all-time high from 2014, per RunRepeat), but it brings with it highly specific needs that are harder to meet. In athletics, custom fit was something for which only 21% of consumers would pay more in 2026, while durable construction saw a leap in value, cited by 43% of consumers, and comfort again showed up as something for which almost a third of consumers were willing to pay more.

ATHLETIC SHOE FEATURES CONSUMERS ARE WILLING TO PAY MORE FOR



Age Group	Custom fit & personalization	Innovation in performance	Strong/durable construction	Innovation in tech integrations	Overall look/design	Innovation in comfort	Sustainable materials and/or production	Innovation in design	Partnership with designers ¹	Partnership with athletes or influencers ¹
15-24	24%	29%	34%	14%	39%	34%	22%	23%	17%	16%
25-34	26%	25%	37%	19%	34%	25%	24%	20%	15%	19%
35-54	19%	19%	40%	19%	36%	30%	17%	15%	15%	14%
55+	18%	8%	54%	4%	43%	31%	20%	9%	7%	5%

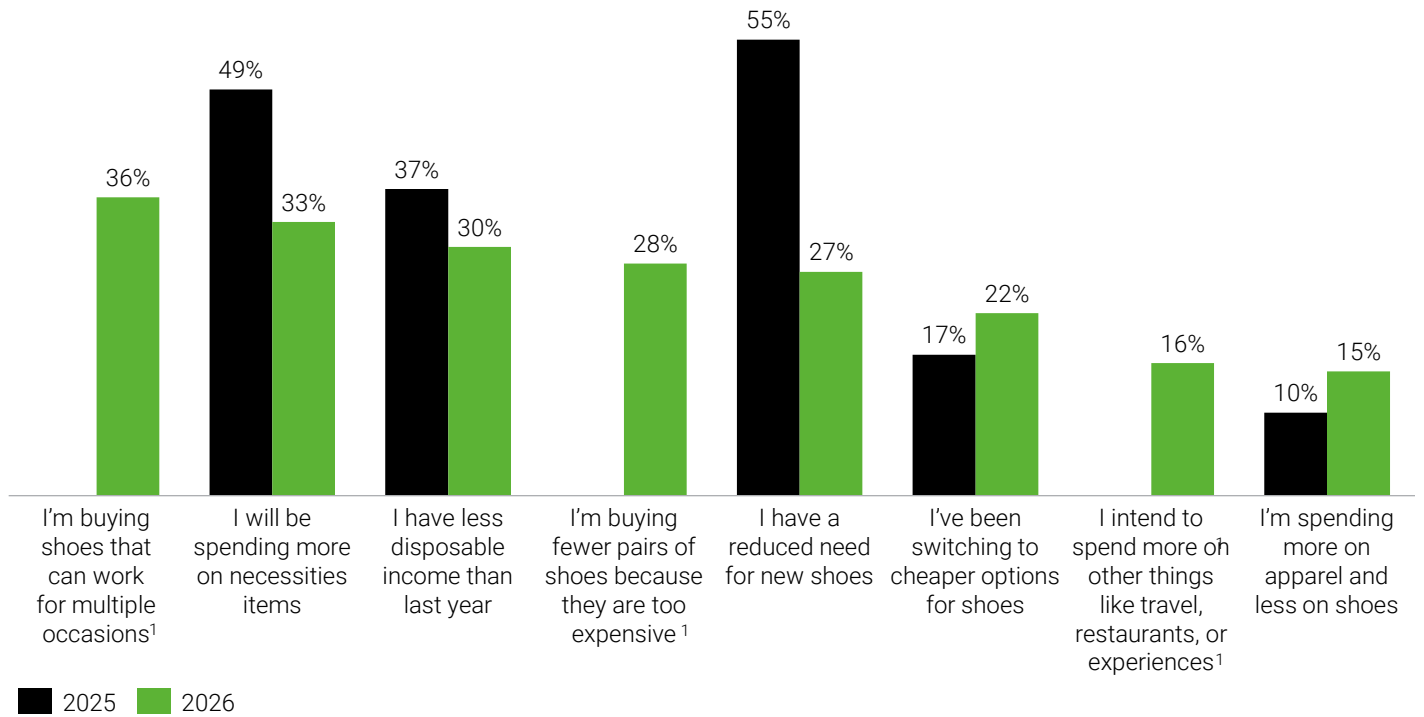
1. New response option in 2026

TOP 3 DRIVERS OF CHANGING ATHLETICS SPEND CONSUMERS SPENDING MORE VS. LESS



Of consumers who planned to spend less in 2025, over half of consumers cited a reduced need for new shoes. In 2026, only 3 in 10 of those planning to spend less said it was because they don't need shoes. Demand is there, but the implication is they cannot afford the shoes they want or need.

MAIN DRIVERS OF CUSTOMERS SPENDING LESS



1. New response option in 2026

Footwear companies and retailers must clearly articulate the value and differentiation of their offerings to win over the consumer, bearing in mind demographic particulars. Younger consumers can be lured with a variety of different features like comfort, partnerships, and performance innovation. Older consumers focus more on durability and construction (bear in mind, too, that [20% of adults experience foot pain](#)).

Additionally, getting the mix right will be essential to driving growth: that means excelling at assortment architecture, space allocation, and merchandising.

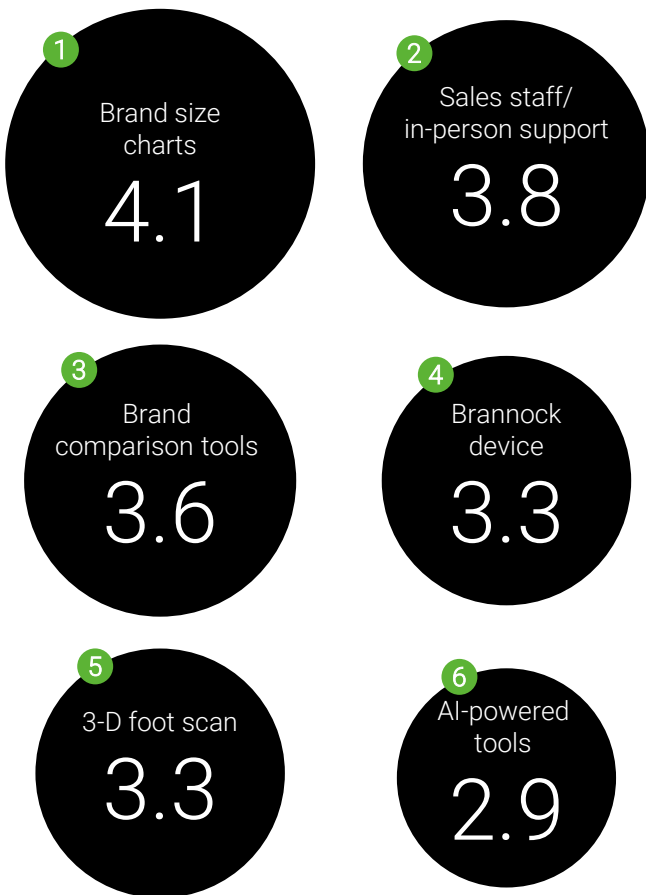


The shiny new thing (AI) isn't as trusted as the shiny old thing (the Brannock)

While AI integrations are all the rage in retail, footwear consumers aren't quite there yet. AI powered fit tools ranked last in reliability among consumers. Surprisingly, this was true among all age groups—it was only among high-income (\$150K+) consumers that these tools showed up as a slightly more trusted resource.

RANKING OF CONSUMER – FACING TOOLS TO DETERMINE BEST FIT

Score based on rankings



In fact, the tools consumers are most invested in are old-fashioned favorites like the ability to compare prices and get restock alerts (unsurprising, as out-of-stocks remain a primary reason for abandoning the purchase).

“

While we know that fit is the reason consumers head to stores, and poor fit is a primary barrier to purchase, tech has not solved this problem in the eyes of the consumer. Rather, shoppers want staff support and favorable price comparisons. AI enablement is best saved for the back office.

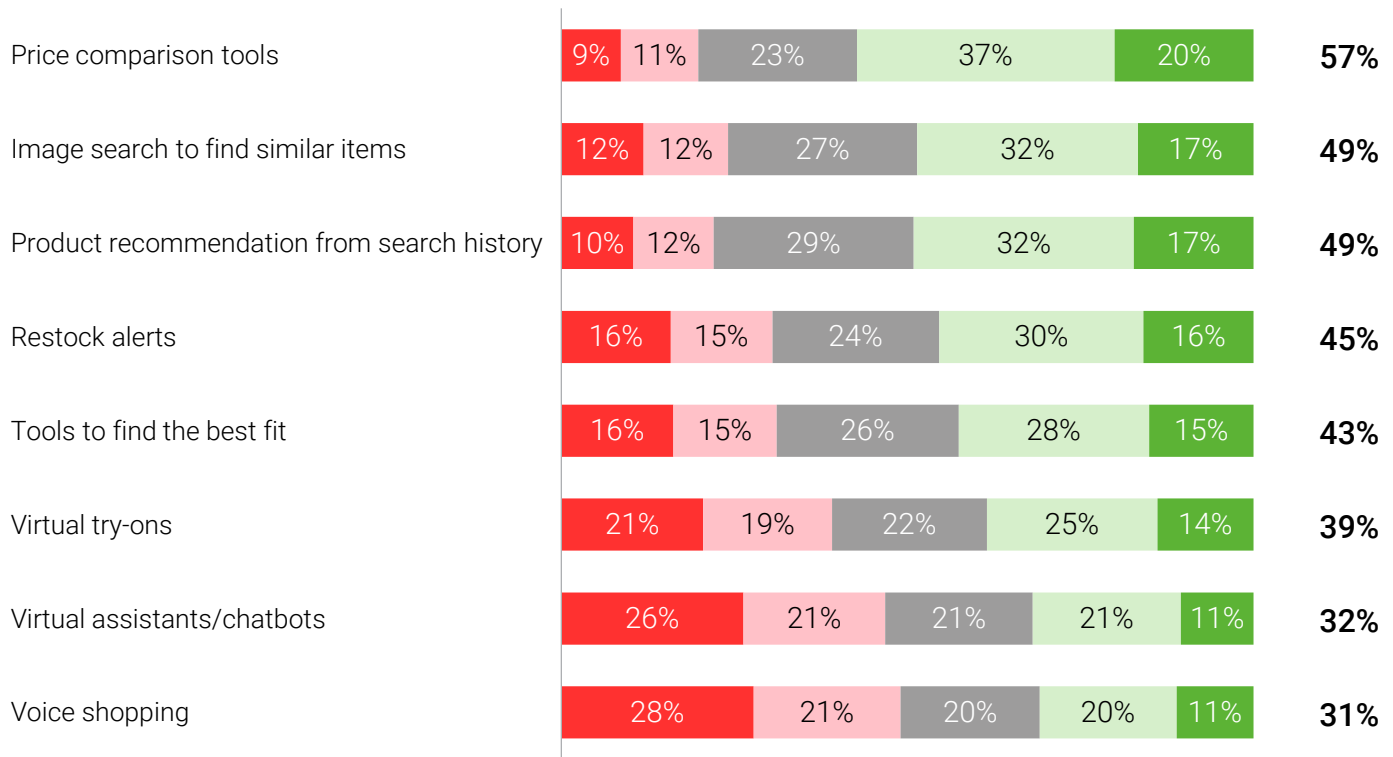


Andrew Hogenson
Retail Fashion Expert
Partner & Managing Director



Price comparison tools lead the suite of consumer-favored decision-makers

LIKELIHOOD OF USING AI TOOLS WHEN SHOPPING FOOTWEAR



■ Very likely
 ■ Likely
 ■ Neutral
 ■ Unlikely
 ■ Very unlikely

Retailers are in danger of chasing the shiniest, newest tool in AI at great cost. Currently, just 32% of retail and consumer product executives say their AI programs are high maturity, per the [AlixPartners Disruption Index](#). For all the talk about investing in AI to get closer to the customer and impact the top line, much AI spend ends up in efficiency plays and back office.

High-tech tools like 3D foot scans and AI-powered tools are not yet a trusted source for consumers. High-income consumers (\$150K+) are most trusting of these tools—these tools jump up two spots in the rankings with these consumers.



RANKING OF CONSUMER-FACING TOOLS TO DETERMINE BEST FIT

	Total	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
Brand size charts	1	1	1	2	1	1	1	1	1
Sales staff/ in-person support	2	2	2	1	2	5	2	4	5
Brand comparison tools that use past purchases to determine fit	3	3	3	3	3	2	3	2	2
Brannock device- metal tool used in-store to measure length and width	4	4	4	4	4	3	6	3	6
3-D foot scan	5	5	5	5	5	4	4	6	3
AI-powered tools that use photos of your feet to determine size	6	6	6	6	6	6	5	5	4

The ROI for AI-enabled tools is stronger in use cases such as:



Design & manufacturing

Should-cost modeling, last design & fit, data-driven size grading, and production size curves informed by real customer data.



Returns reduction

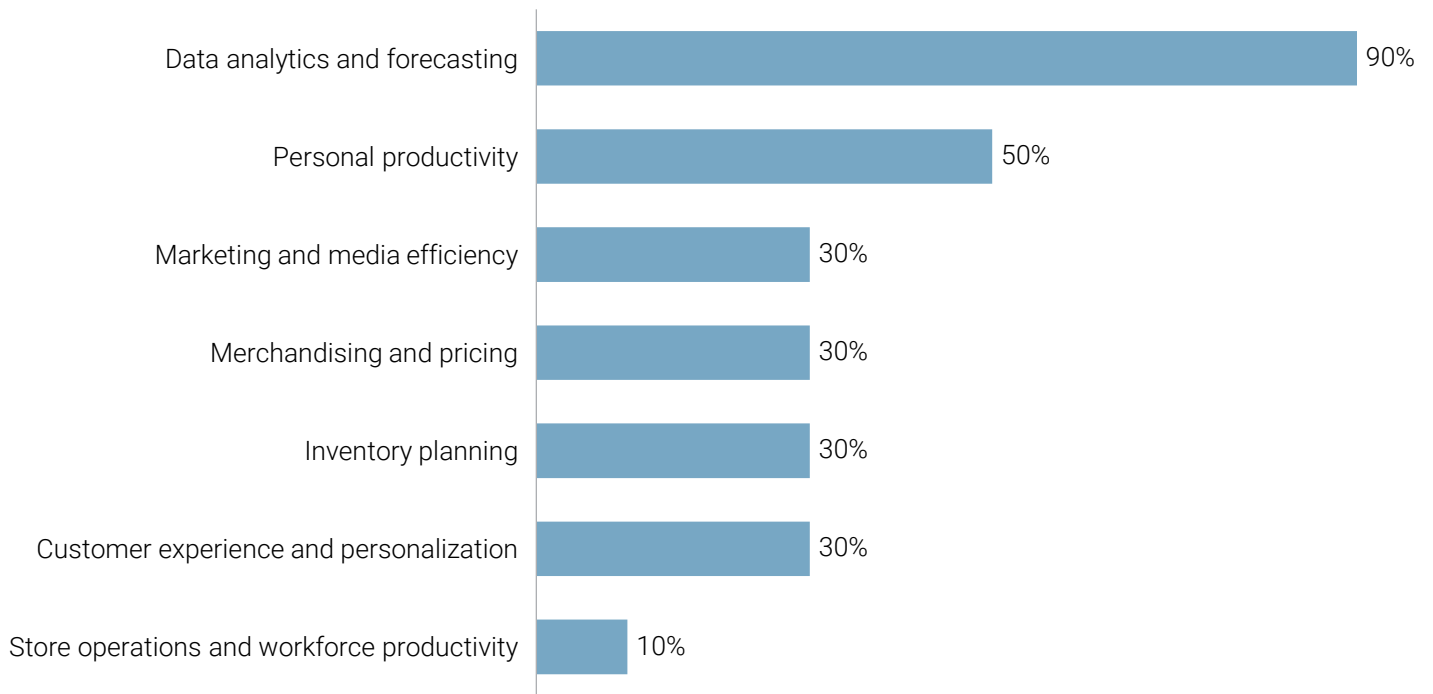
Predictive models to identify high-return-risk customers/products and intervene pre-purchase.



Point of sale

Fit recommendation engines, virtual try-on, guided selling, and personalized product discovery.

TOP STRATEGIC PRIORITIES FOR AI ADOPTION ACCORDING TO EXECUTIVES



Source: FDRA Executive Survey Spring 2026

Thus, footwear executives should prioritize investments in driving efficiencies and costs savings, while the consumer catches up.



Inventory friction is rising fast. Stockouts and availability issues have jumped as reasons for abandoning purchases (+31 pts vs. last year), alongside cost as the top driver—signaling that a focus by executives on “big bets” and misaligned assortments are leaving money on the table.

This raises the stakes for getting inventory in the right channels and formats—companies need to decide which stores or digital options (including buy-in-store or ship-to-home) should hold which product, in what depth. This strategy needs to be finessed.

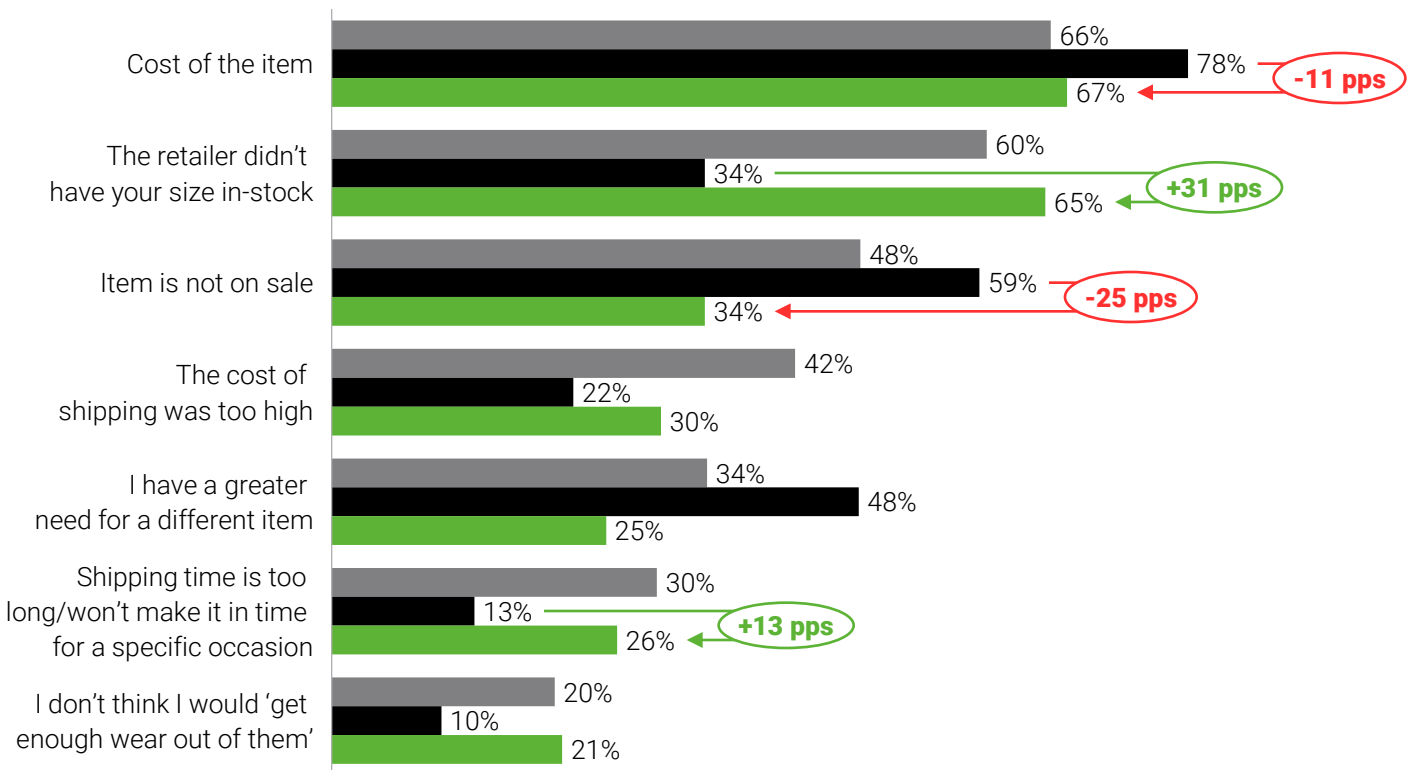
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Trends have always moved fast in footwear, but the cutthroat buy decisions consumers are making under financial duress mean that it's even riskier to try to predict breakout hits. Instead, we are talking to executives about assortment productivity and maximizing the chances you satisfy a consumer's realm of needs when they do make the trip.



Amit Mahajan
Retail Sourcing Expert
Partner

REASONS CONSUMERS ABANDON A PURCHASE



■ 2024 ■ 2025 ■ 2026

Betting on “big shoes” has been tricky due to long development cycle and inability to forecast well, and often results in inventory problems. Additionally, brand demand and expanded assortment drive e-commerce success, but long-cycle fashion bets often mismatch what consumers actually want—especially in non-athletic categories where functional drivers outweigh fashion and brand considerations.

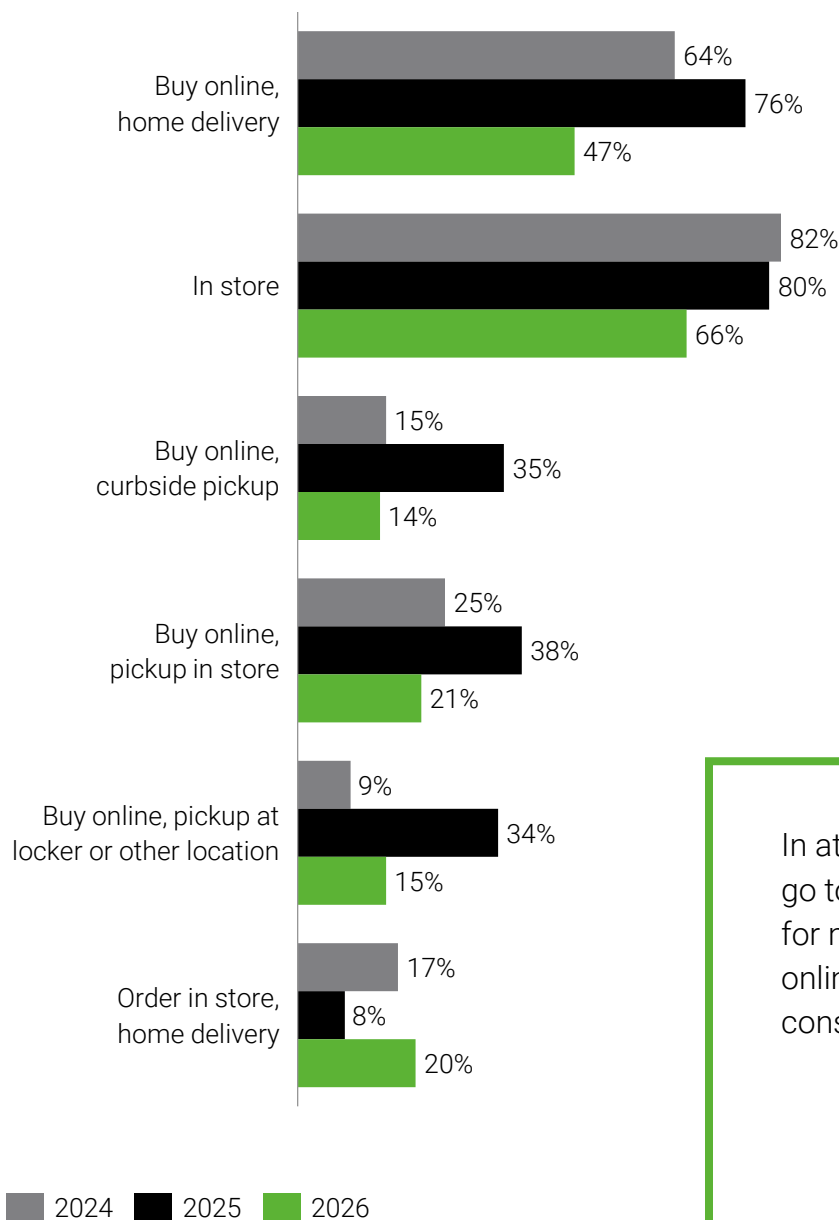
Understanding assortment productivity at a granular level is imperative. Knowing where to pull back on style count and where to invest based on gross margin ROI and style productivity is becoming a must-have capability.

Additionally, speed and agility are no longer nice-to-haves but need-to-survives. Teams need to be able to monitor and adjust to consumer response and purchase behaviors in order to minimize inventory investments while capturing customer demand.



You'll find them by the lounges and stools, waiting to have their foot measured the old-fashioned way. The data show that stores remain the most popular way to shop, and consumers are looking to purchase in-store for home delivery at a significantly higher rate.

PREFERRED METHOD OF SHOE PURCHASING



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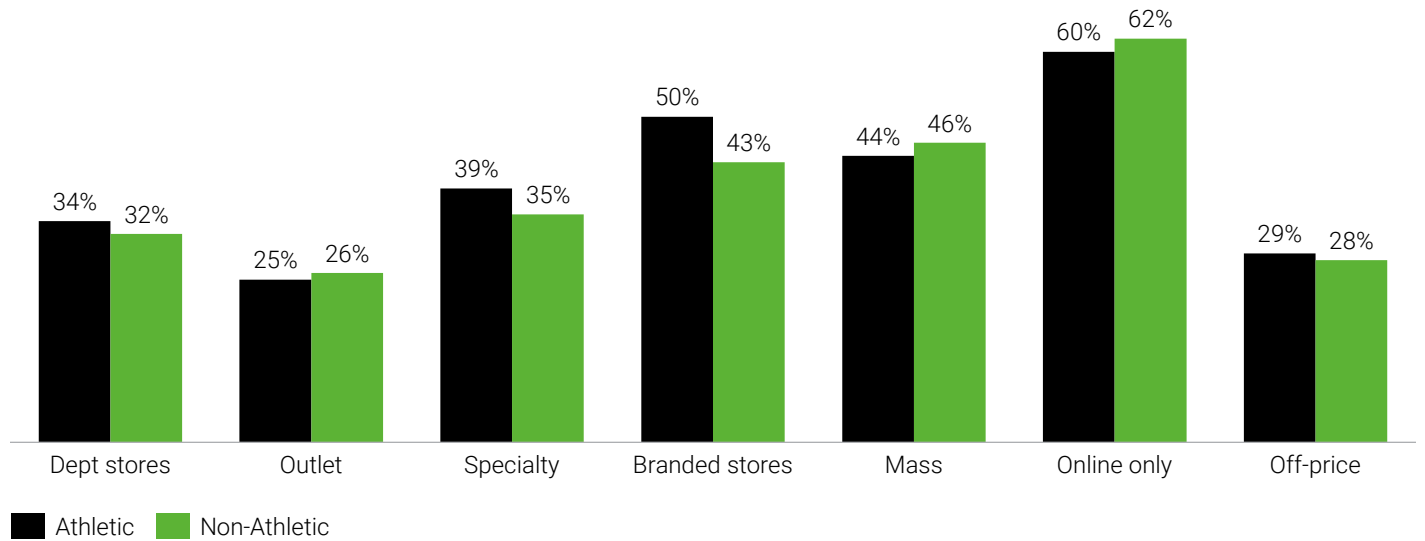
The least popular shopping strategy says a lot about where the consumer is at. They definitely do not want to have to order multiple pairs of shoes then return the excess pairs. They're heading in store most often, even to size up for what becomes an in-store purchase later delivered to home. The ease of online shopping trades off against the instant gratification of in store.

Meghan Hayward
Consumer Insights Expert
Director



In athletics, consumers are more likely to go to branded sites than when shopping for non-athletic shoes online. However, online only retailers (like Amazon) are consumers' go-to retailer.

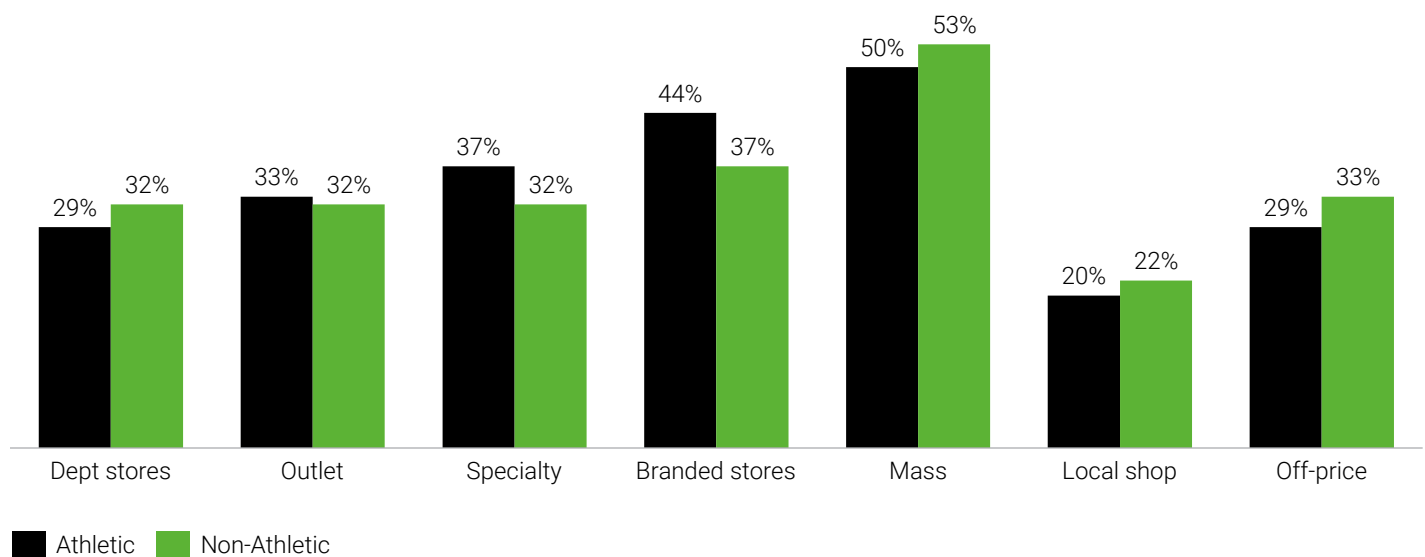
ONLINE PURCHASE INTENT BY RETAILER TYPE: ATHLETIC VS. NON-ATHLETIC



Source: Consumer footwear survey | April 2025

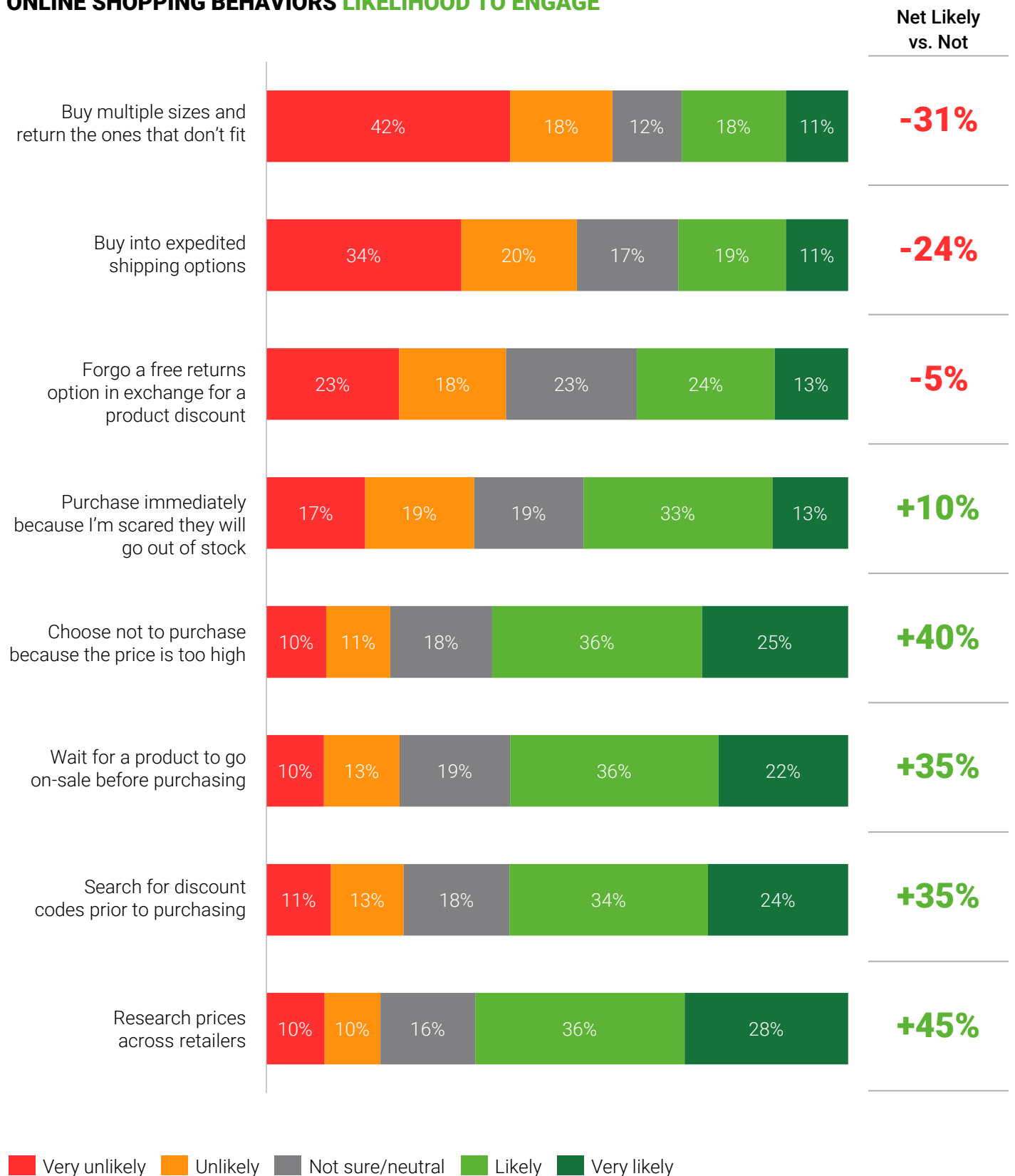
When shopping in-store, half of all consumers are selecting mass retailers for both athletic and non-athletic shoes

IN-STORE PURCHASE INTENT BY RETAILER TYPE: ATHLETIC VS. NON-ATHLETIC



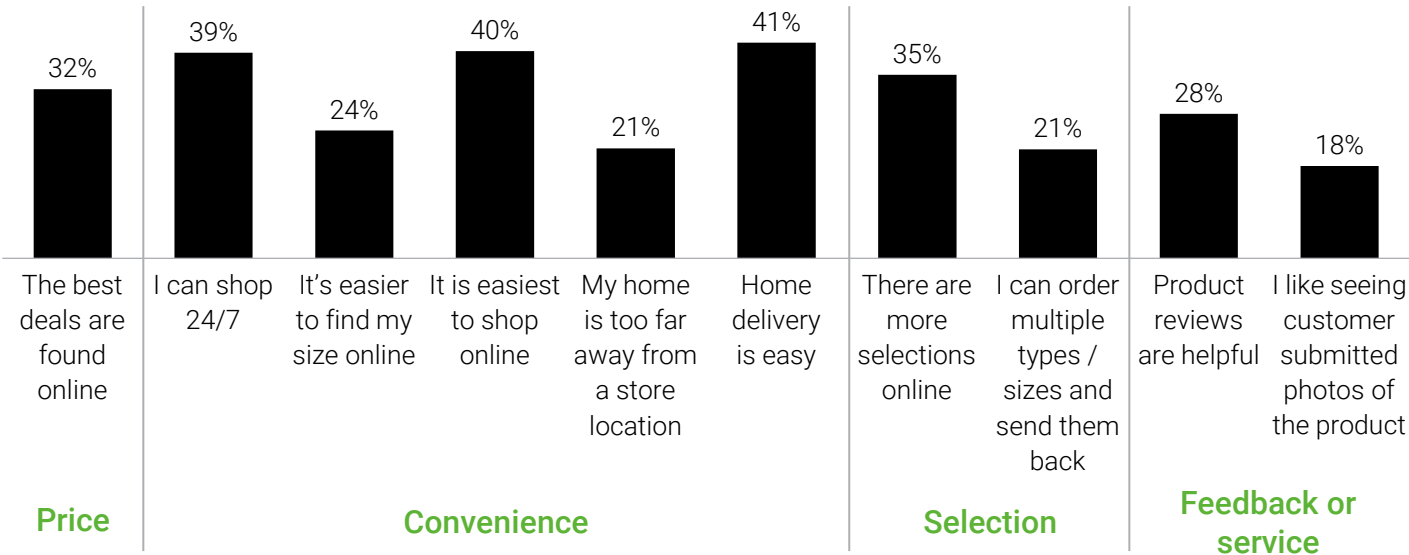
Online, footwear consumers are highly likely to engage on cost-savings measuring like waiting for sales, researching discount codes, and conducting pricing research, but they don't want to recreate the shoe-store experience at home with stacks of possible options and a burden to return the rest—they want the right pair of shoes now.

ONLINE SHOPPING BEHAVIORS LIKELIHOOD TO ENGAGE



Convenience factors like 24/7 shopping and easy home delivery are what drive consumers to purchase online. In store, we see that instant gratification and try-before-you-buy are key drivers.

REASONS TO PURCHASE ONLINE

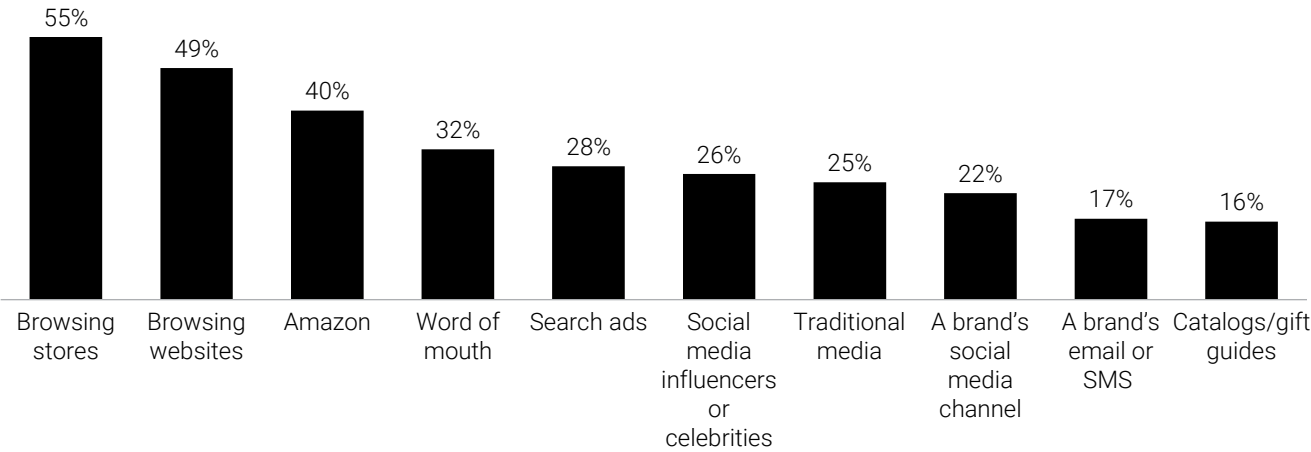


REASONS TO PURCHASE IN-STORE



Both online and in-store, consumers are most influenced by their browsing behaviors: they use Amazon.com as a search engine and starting point when they're ready to buy a new pair of shoes.

PRODUCT DISCOVERY BY AGE SEGMENT



Age Segment	Browsing stores	Browsing websites	Amazon	Word of mouth	Search ads	Social media influencers or celebrities	Traditional media	A brand's social media channel	A brand's email or SMS	Catalogs/gift guides
15-24	51%	45%	43%	33%	31%	48%	30%	35%	21%	22%
25-34	60%	56%	37%	34%	34%	33%	25%	31%	17%	17%
35-54	52%	52%	43%	34%	33%	31%	27%	26%	19%	19%
55+	59%	43%	36%	27%	17%	6%	18%	6%	10%	10%

In-store experience ranks among the top three most influential drivers of purchase, behind price and product reviews. The lesson for executives is to prioritize capital investment in both stores and labor—the most underappreciated influencer could be the store associate who is able to drive the consumer toward the right fit and price on the spot.



MOST INFLUENTIAL IN DETERMINING WHAT TO BUY RANK **RANK BY AGE**

	Total	15-24	25-34	35-54	55+
Influencers/celebrity	9	9	9	9	9
Product reviews	2	3	1	1	3
Brand positioning	4	4	4	4	4
Limited edition products	6	5	7	5	6
Social media	8	8	5	8	8
Storytelling/marketing	7	7	8	6	7
In-store experience	3	1	3	3	2
Pricing	1	2	2	2	1
Loyalty rewards	5	6	6	7	5

MOST INFLUENTIAL IN DETERMINING WHAT TO BUY **RANK BY INCOME**

	Total	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
Influencers/celebrity	9	9	9	9	9	8	9	9	7
Product reviews	2	3	2	2	2	1	1	1	1
Brand positioning	4	4	6	4	4	3	4	4	2
Limited edition products	6	6	5	5	6	5	6	5	6
Social media	8	8	8	7	8	9	8	7	5
Storytelling/marketing	7	7	7	8	7	7	7	8	8
In-store experience	3	2	3	3	3	4	3	3	4
Pricing	1	1	1	1	1	2	2	2	3
Loyalty rewards	5	5	4	6	5	6	5	6	9

There's no big shoe coming to save the day: fundamentals and an all-purpose value prop are key

The data show that the two most important factors are price and ... price. The well-shod consumer has done extensive research into product reviews and brand, and is comparison shopping above all.

The preference for a "casual" shoe is less about a strictly defined model to emulate and more about recognizing that consumers want a comfortable shoe that will get them from A to B, and from activity to event. That sets the scene for a complex ask of footwear executives, who must manage inventory and assortment while ensuring the messaging is broad enough to induce a wary shopper. And, despite AI being all the rage, an imperative to execute well on age-old fundamentals, like assortment and inventory discipline, pricing, costing, and fit—albeit all of which can be AI-enhanced.

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U.S. Consumer Footwear Survey administered online: March 9 to March 23, 2026
Population: 1,006 adult (ages 15 and above) U.S. footwear consumers, across all regions, demographics, and income levels, nationally representative audience
FDRA Shoe Executive Business Outlook Survey administered online: Q1, 2026
Population: Nearly 100 U.S. executives across footwear brands, retailers and manufacturers in the FDRA membership



AlixPartners

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.