AlixPartners FDRA

U.S. CONSUMER & EXECUTIVE FOOTWEAR SURVEY

Balancing BTS budgets: Footwear consumers are shopping earlier for fewer pairs

DATA PACK | JULY 2026

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Survey overview

Dates administered

June 2-July 6, 2026

Population

1,000 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 the impacts to operations

Five themes

define the 2026 back-to-school footwear consumer

1

Price anxiety is high, but shoppers still believe they get value

78% say children's shoe prices feel higher than last year, yet most still rate the value they get as about the same or better.

2

Budgets are tightening, and shoppers cut pairs before brands

44% plan to spend less than $100 per child, up from 40% in 2025. They switch to cheaper retailers (33%) and buy fewer pairs (30%) before trading down to cheaper brands.

3

Shopping is moving earlier as a cost-control move

30% have already started and nearly a third shifted to buy BTS earlier than last year, mainly to lock in prices and spread purchases across the budget.

4

Practicality wins: comfort, durability and versatility beat brand

Comfort (41%) and durability (39%) drive premium spend, while tech features (4%) trail. About half would buy one all-purpose sneaker instead of separate pairs.

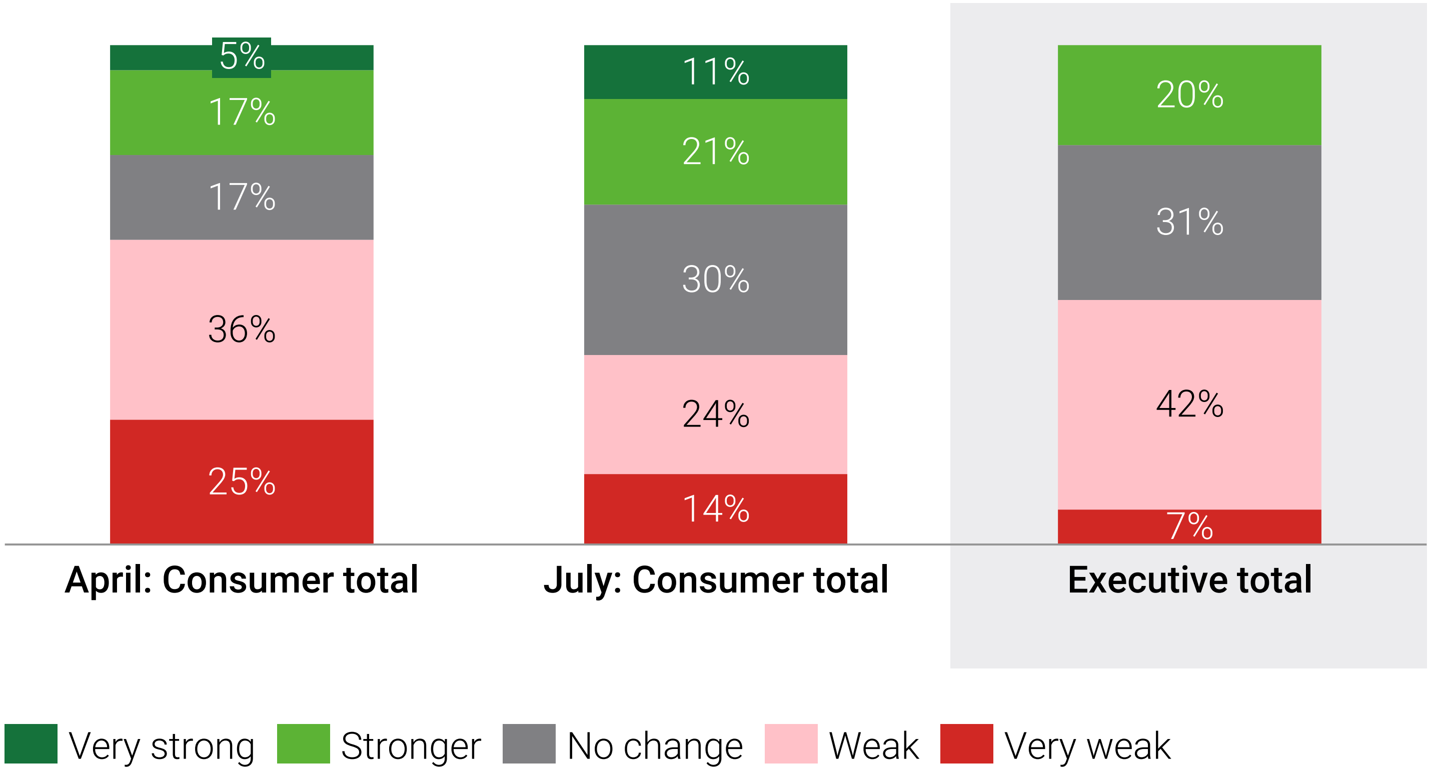
5

Omnichannel is the default and promo events are big, but AI lags

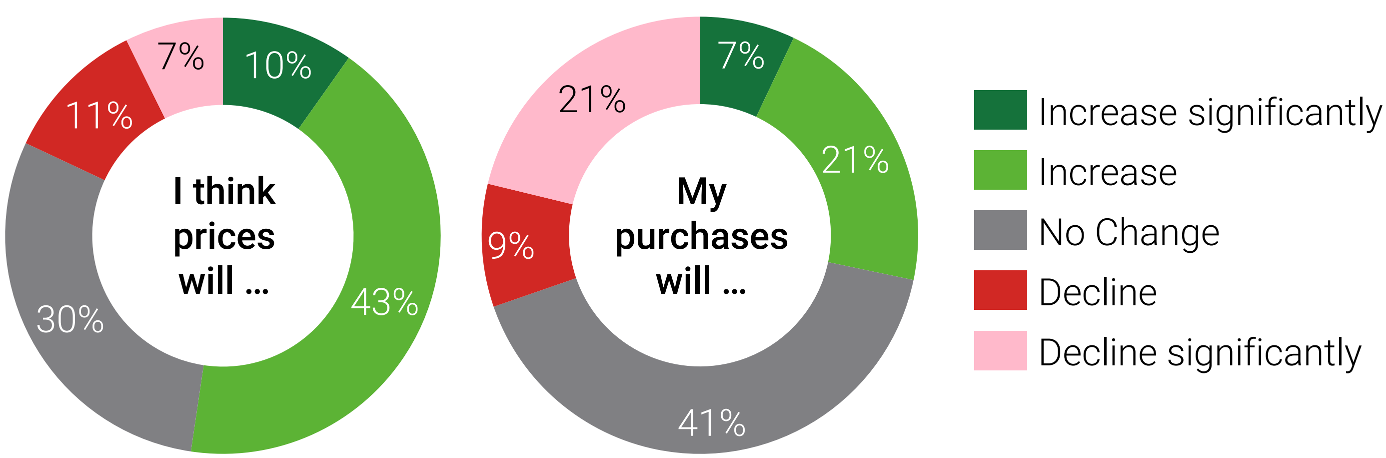
Online (35%) and in-store (34%) are near equal as destinations and 64% will shop Prime Day-type events, yet 26% use no AI shopping tools.

Consumer outlook in April was extremely negative. It appears that has started to improve- and consumers are estimating relatively stable spend in the upcoming 6 months

Economic outlook over next 6 months: Executives vs. consumers



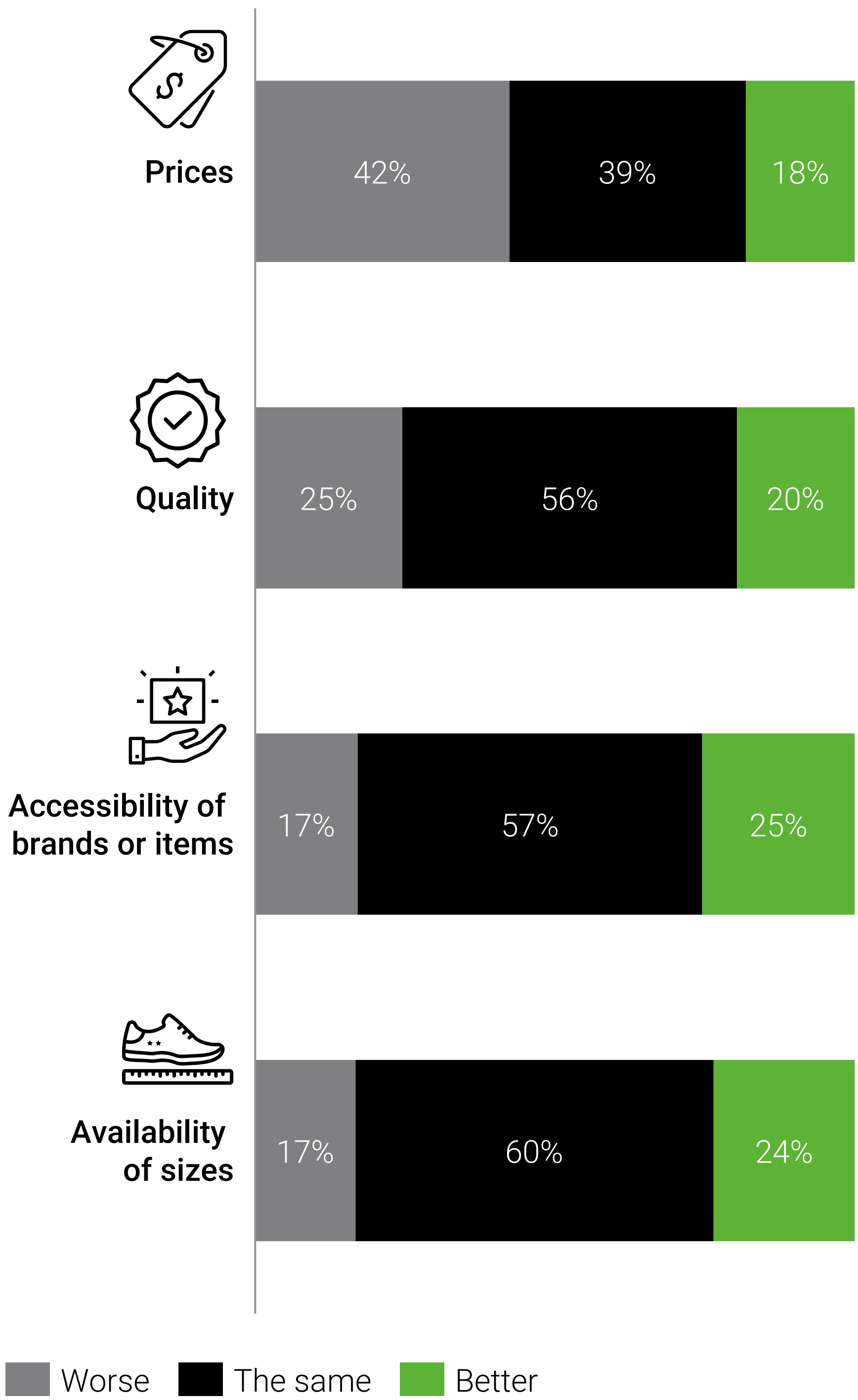
Consumer outlook on footwear prices and purchases over the next 6 months



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

Customer perception of products in the last 5 years

Back-to-school purchases



Net more or less by category

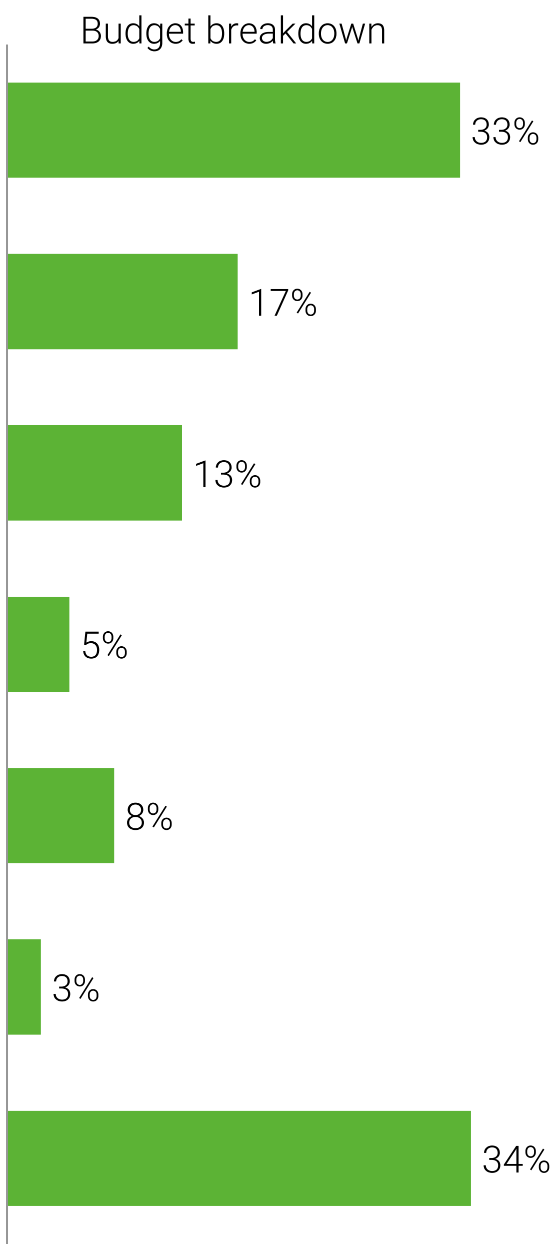
	2024	2025	2026
Prices	▼19%	▼24%	▼24%
Quality	▲15%	▲5%	▼5%
Accessibility of brands or items	▲25%	▲8%	▲8%
Availability of sizes	▲24%	▲11%	▲7%

Based on average consumer budgets, price increases are putting severe pressure on budgets- with transportation/energy alone representing a nearly 2K increase in monthly costs

Breakdown of average consumer budget & estimated increases in costs

Bureau of Labor Statistics, US Dept of Labor, powered by EDITED

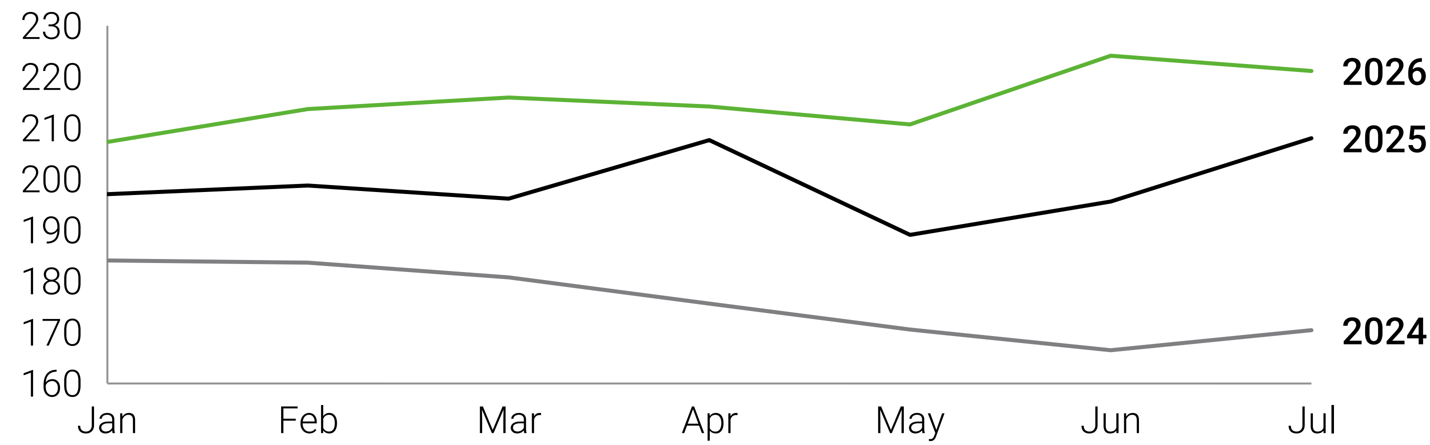
BLS: Average Monthly Budget (Families w/ Kids) $8,809–9,780 *Avg $9,295



	Est. cost increase	Impact to avg budget
Housing	3.4%	+$316
Trasportation	23.5%	+$2,184
Food	3.1%	+$288
Entertainment	3.5%	+$325
Healthcare	3.6%	+$335
Apparel & Services	4..8%	+$446
Other	___	___

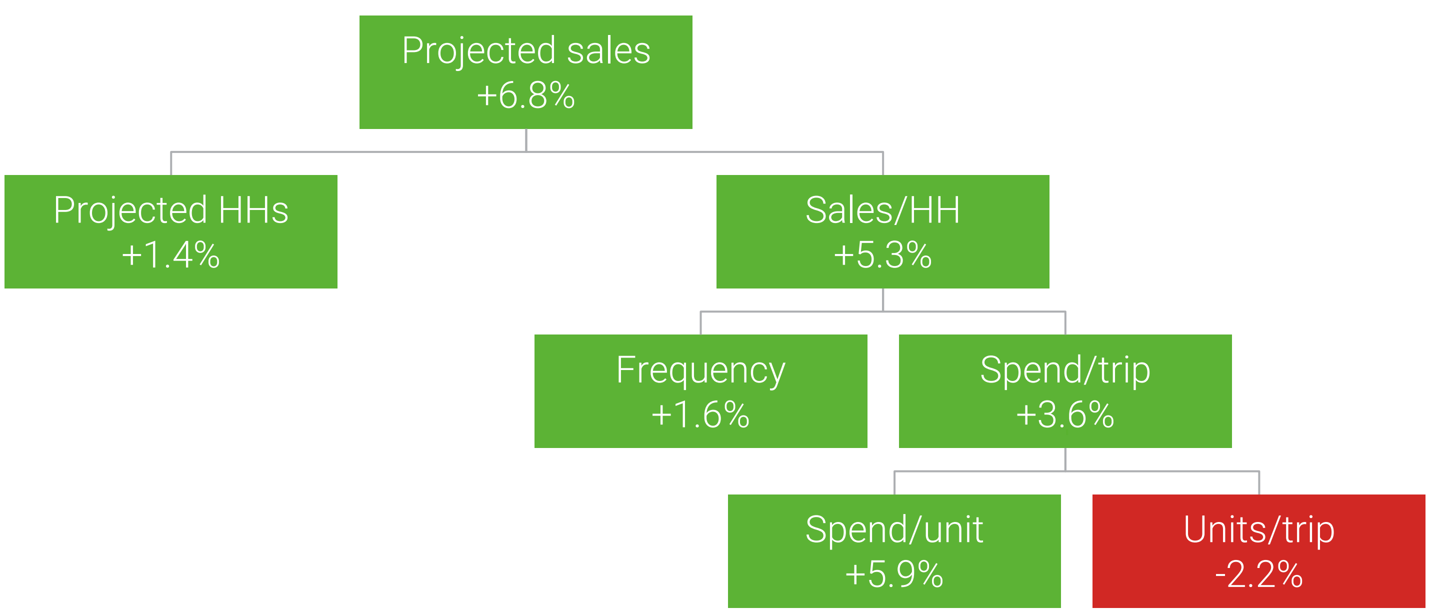
Prices are up on average 8% over last year, and while price hikes have slowed (+18% last year vs 2024), consumers are feeling the squeeze.

Footwear average price by month: Actuals (includes markdowns)
EDITED, AlixPartners analysis



Sales increases in the footwear category are nearly entirely driven by increasing spend per unit. This has been offset but declining units per trip.

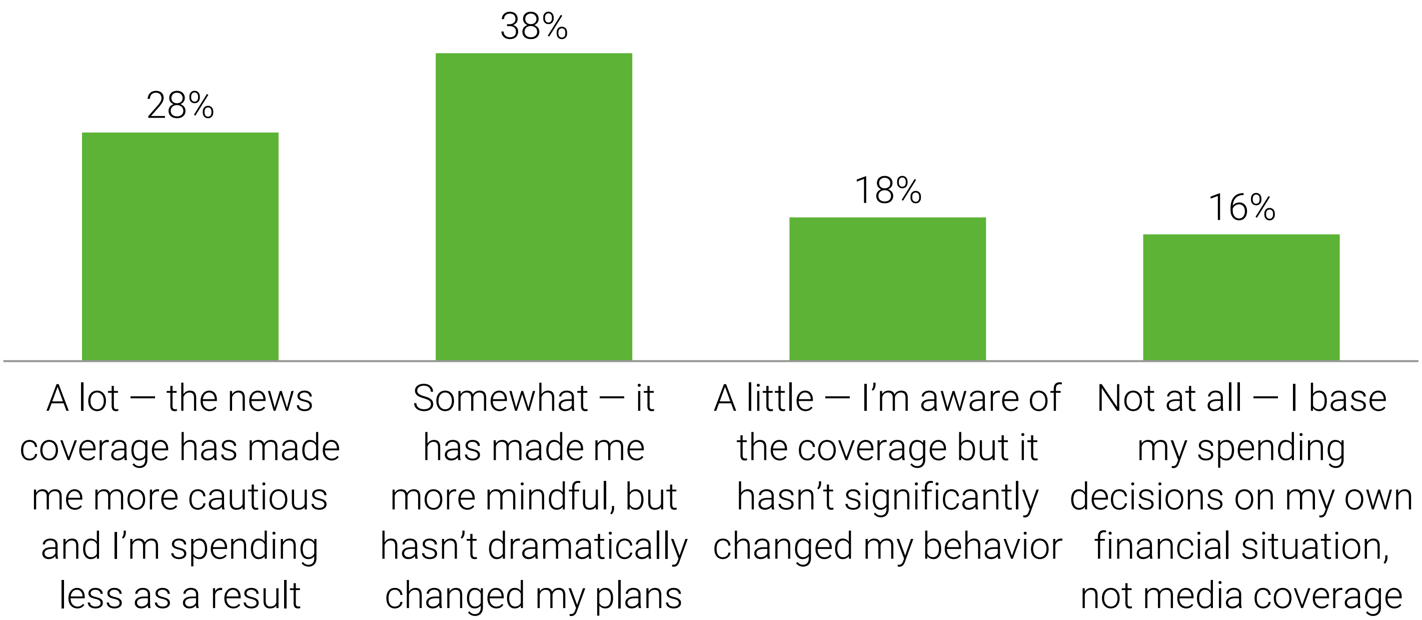
Footwear YOY category performance metrics
Consumer receipt panel



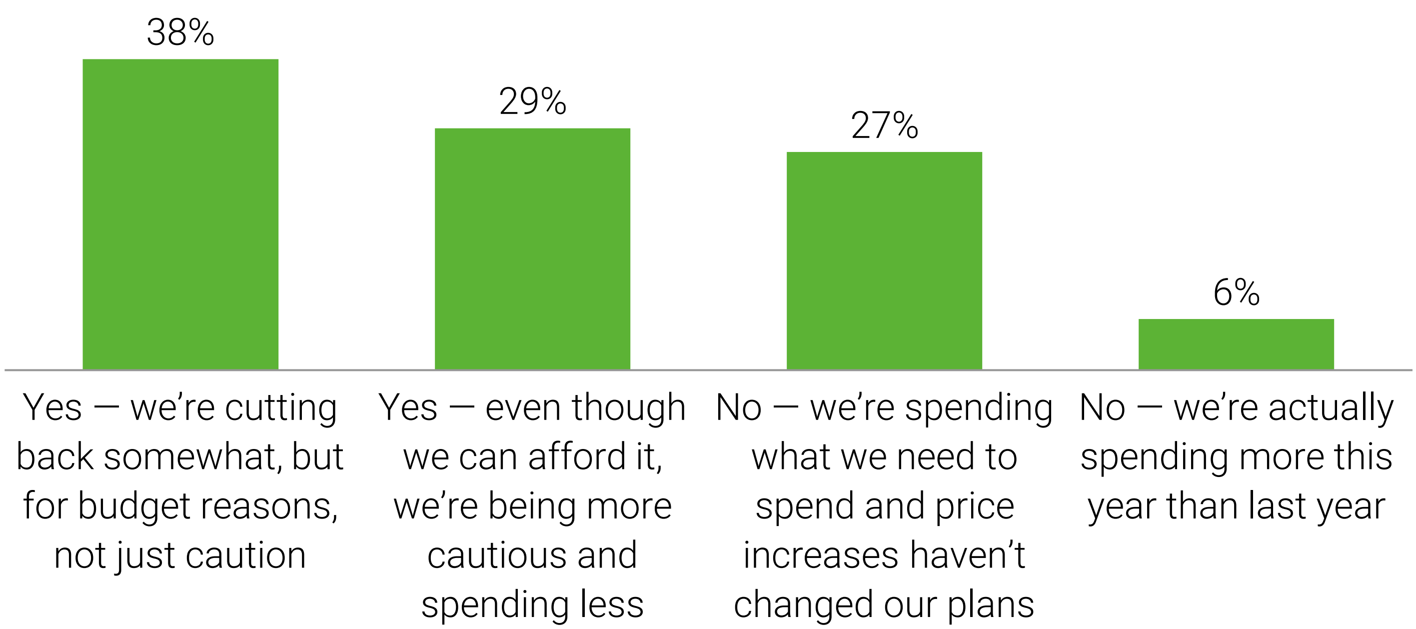
Source: Numerator, Consumer Receipt Panel, LTM ending 6/7/26 Amazon Purchase Footwear Category

News coverage of price increases and tariff impacts has caused consumers to rethink purchases. They are adjusting budgets out of caution.

News coverage impact on spending
Back-to-school purchases

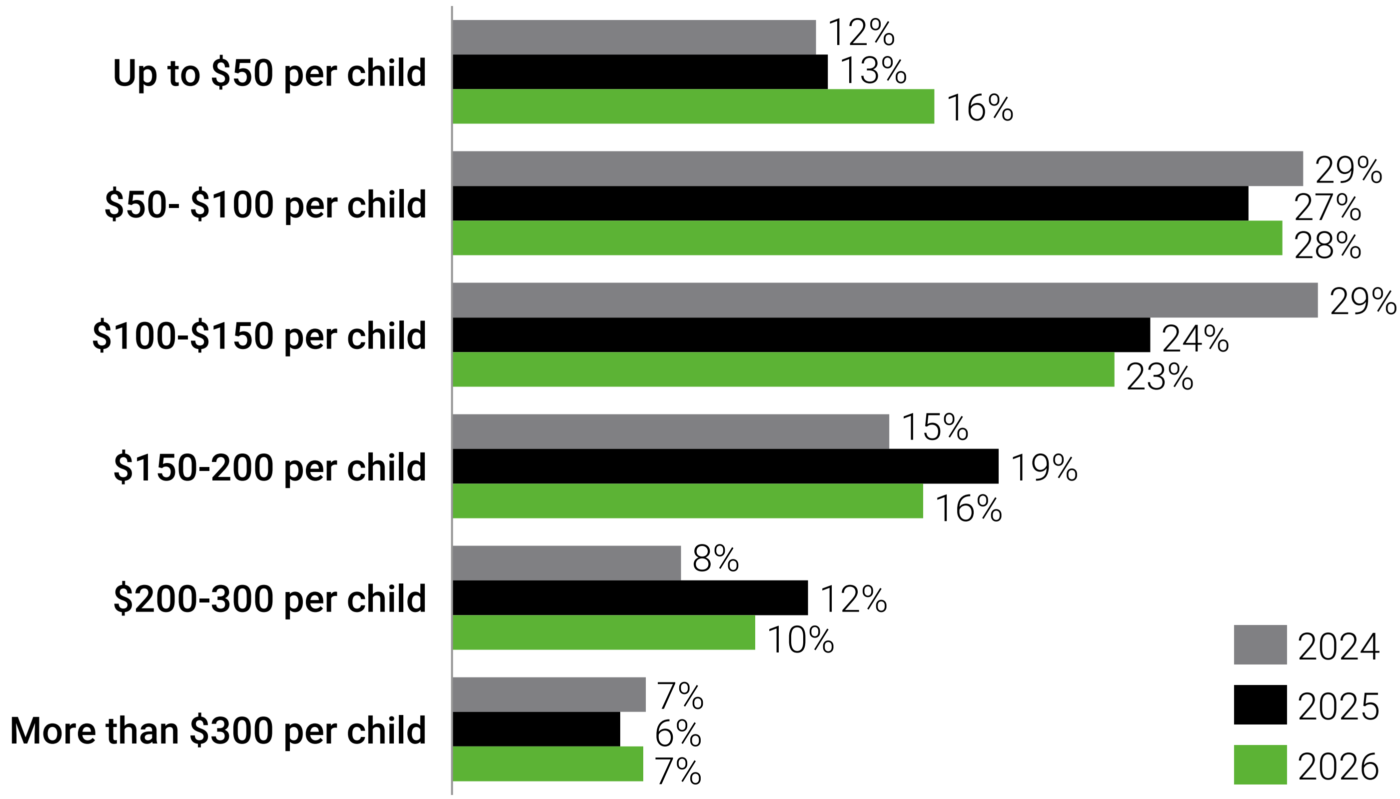


Consumer intent on cutting back despite ability to afford
Back-to-school purchases

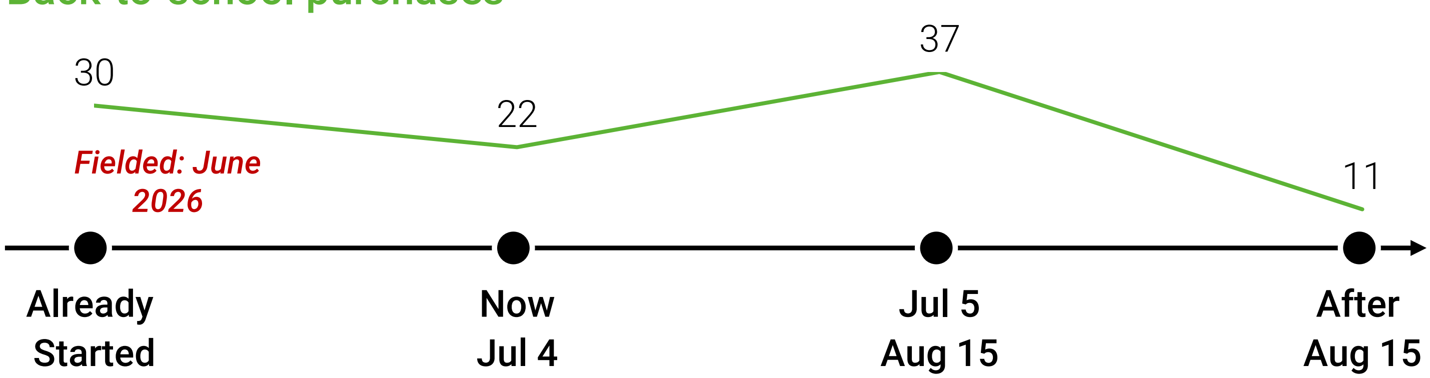


Relative to last year, consumers estimate spending less per child: 44% intend to spend <$100 vs. 40% last year. 30% of consumers have already started shopping.

Estimated spend per child: 2026
Back-to-school purchases



When consumers intend to start shopping
Back-to-school purchases

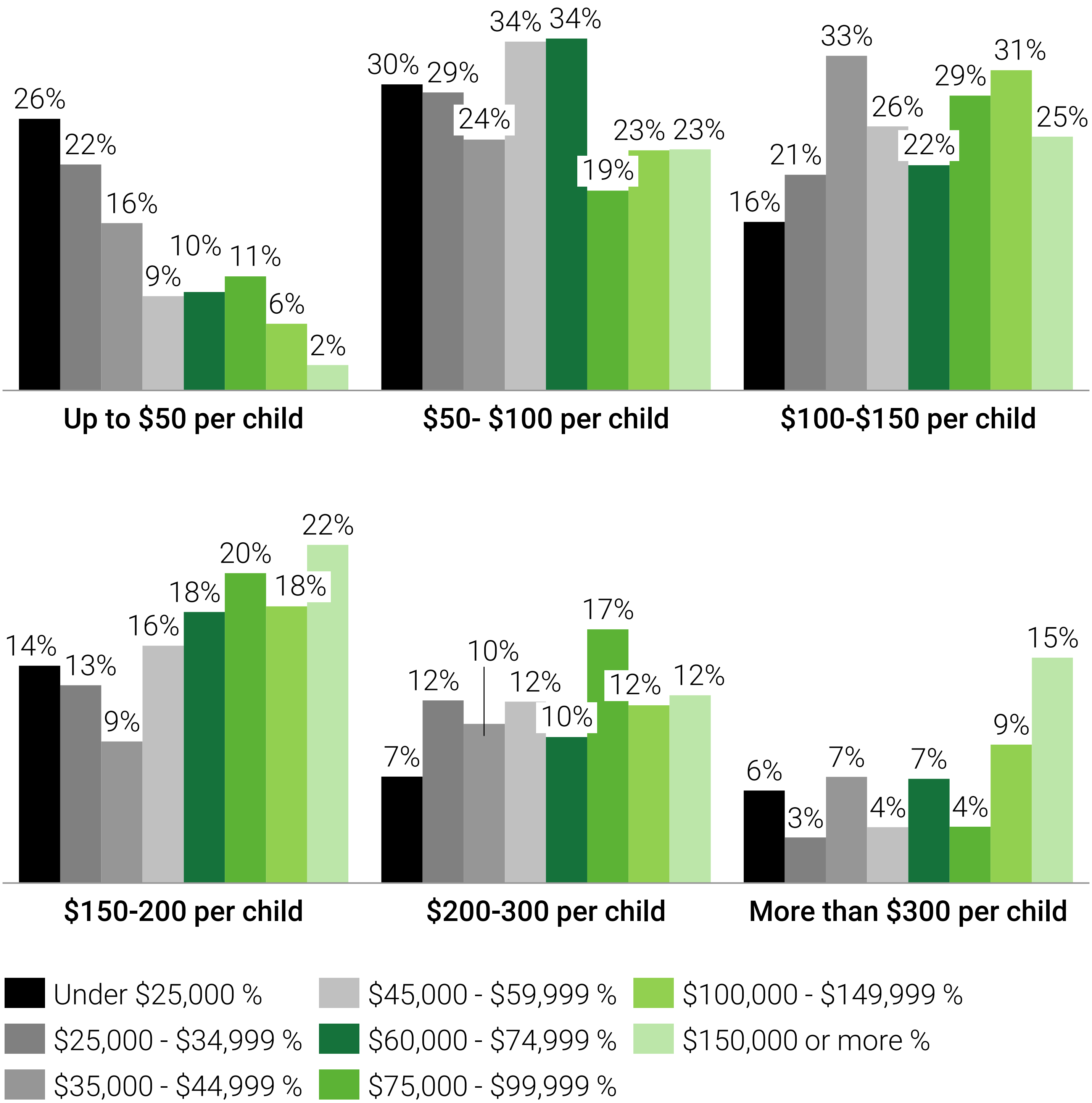


While 60% of consumers say this is the same timing as last year, nearly 1/3 of consumers said their shopping has shifted to earlier in the year

Lower-income consumers are more likely to be spending <$100 per child, while mid- to high-income consumers intend on spending $100-$200 per child

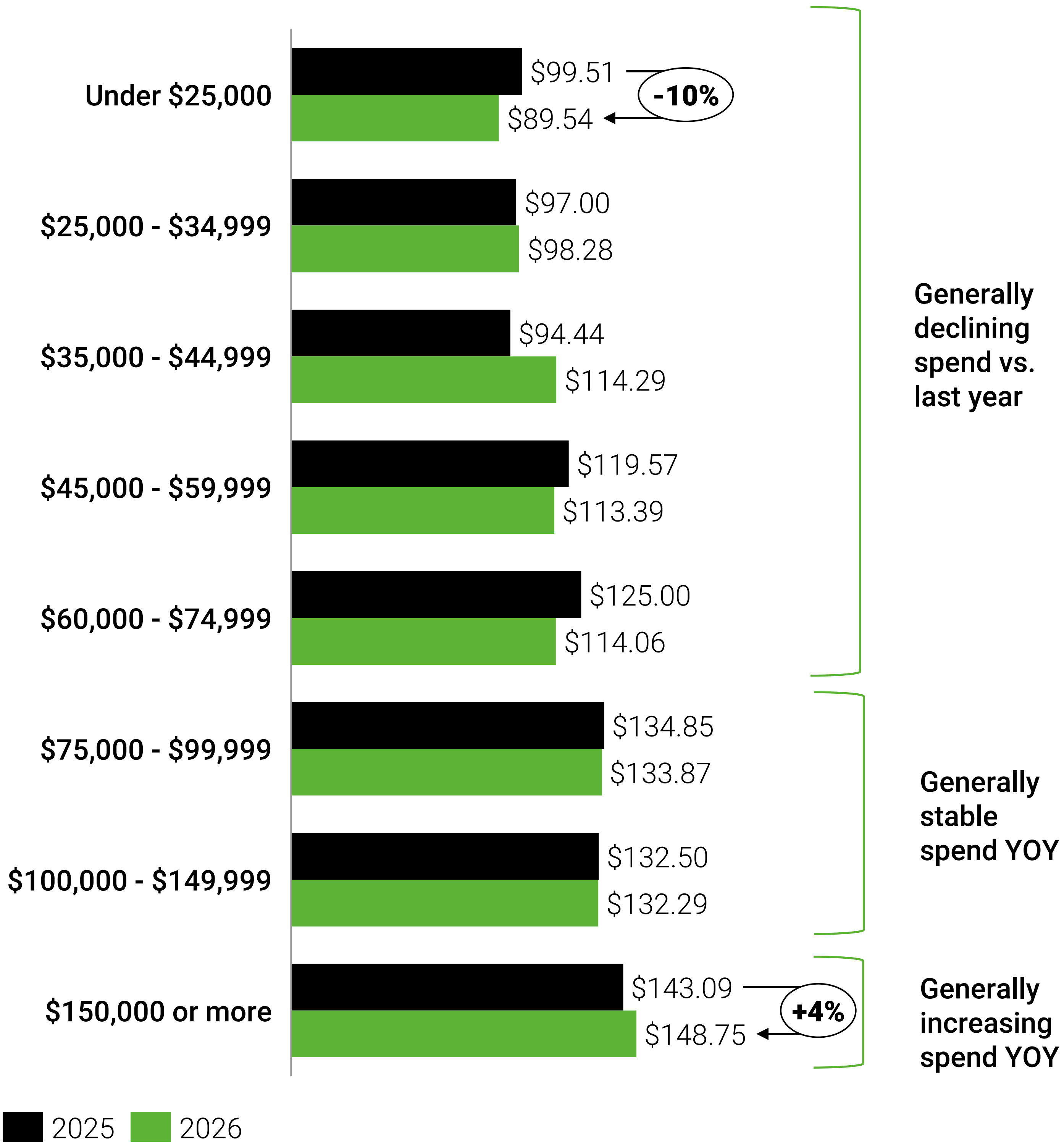
Estimated spend per child: by income level

Back-to-school purchases



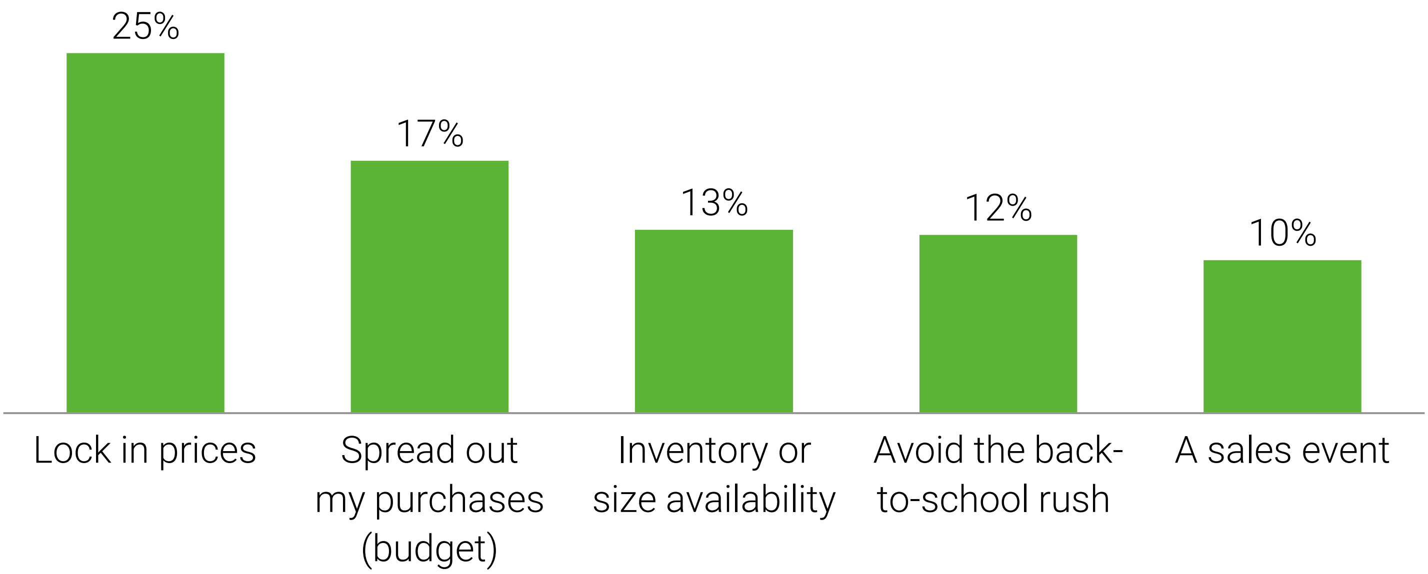
Consumers making $150K plus are planning ~4% increase in spend per child, while lower income consumers are planning a 10% decline

Estimated median spend per child: by income level TY vs. LY
Back-to-school purchases

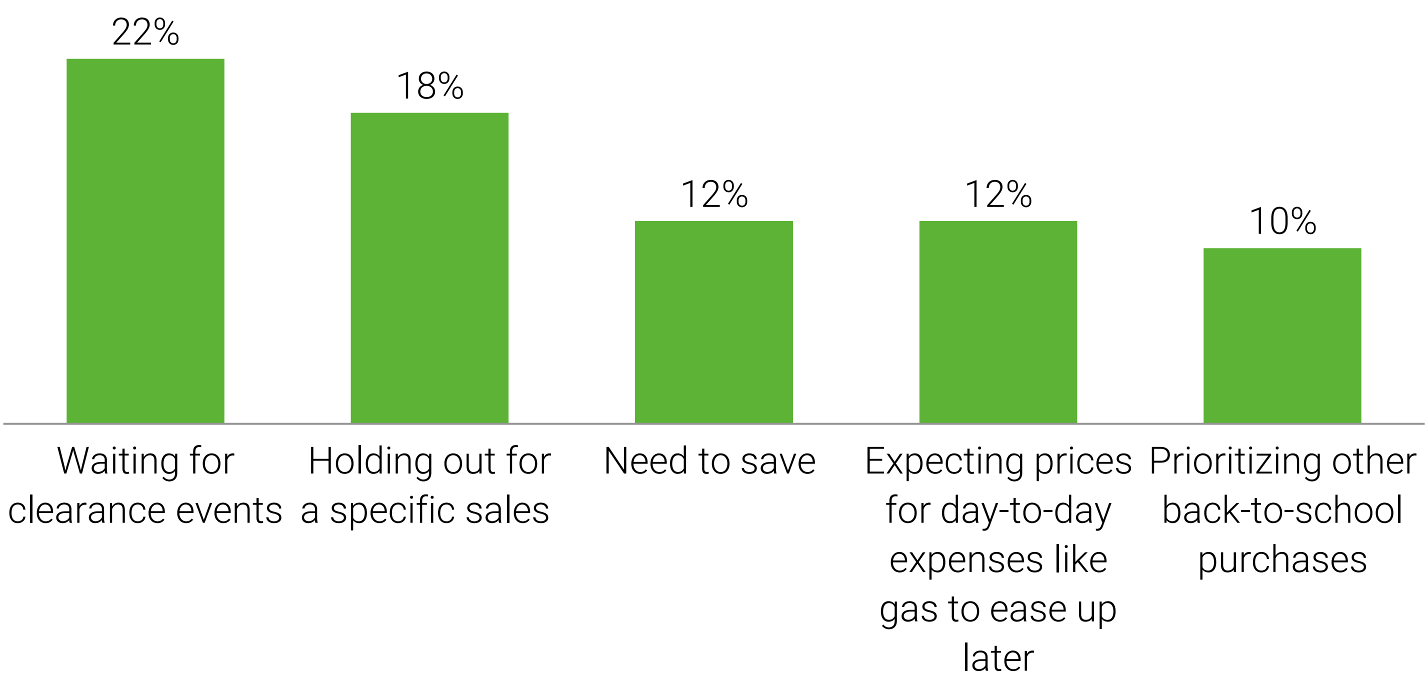


Reasons to adjust shopping patterns either earlier or later are primarily focused on cost-saving measures

Top 5 reasons consumers are starting BTS shopping earlier
Back-to-school purchases

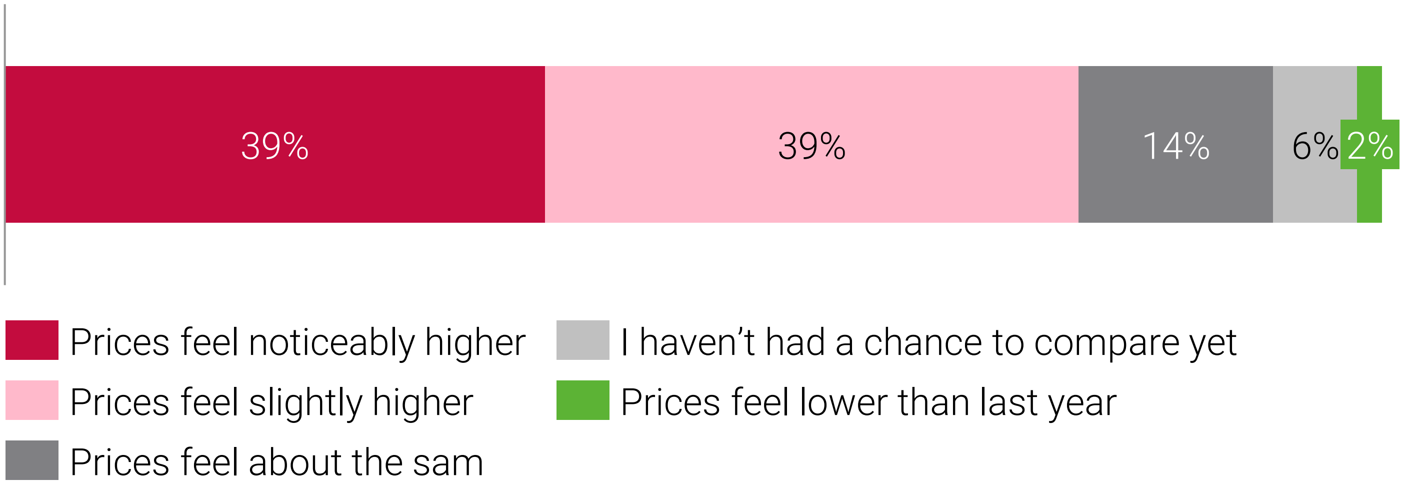


Top 5 reasons consumer are starting BTS shopping later
Back-to-school purchases



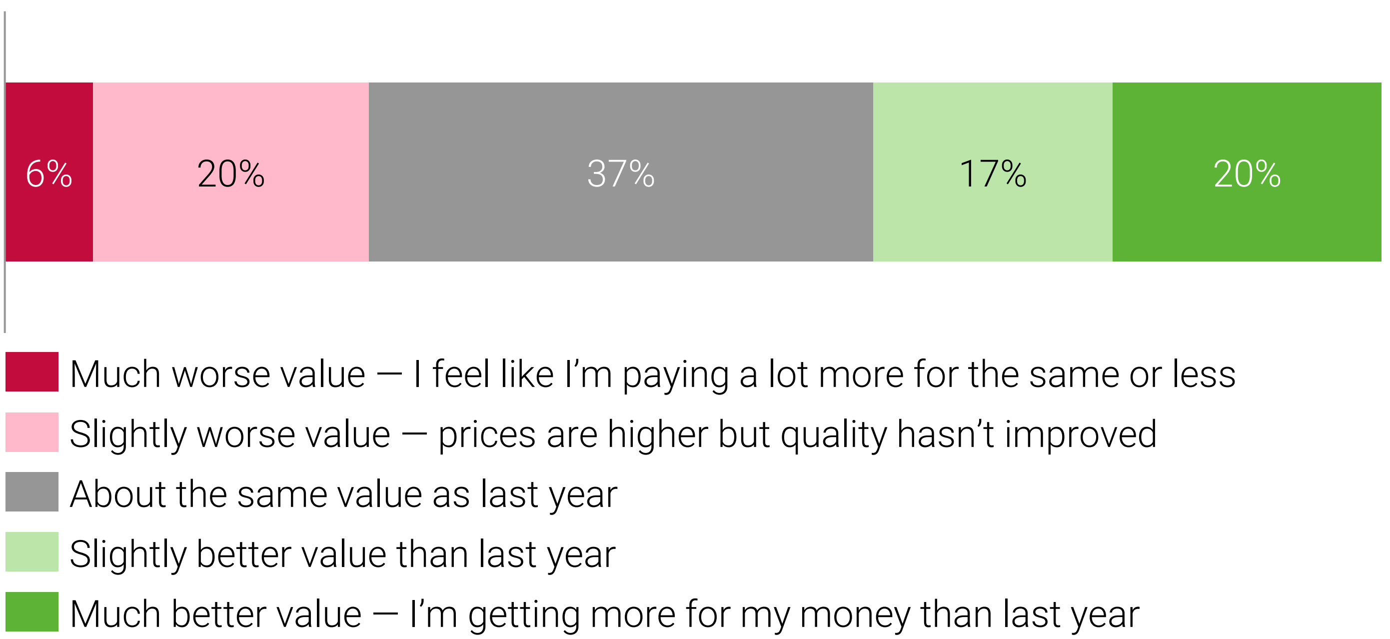
78% of consumers indicate that prices feel slightly to noticeably higher than last year

Price perception of children and teen shoes relative to last year
Back-to-school purchases



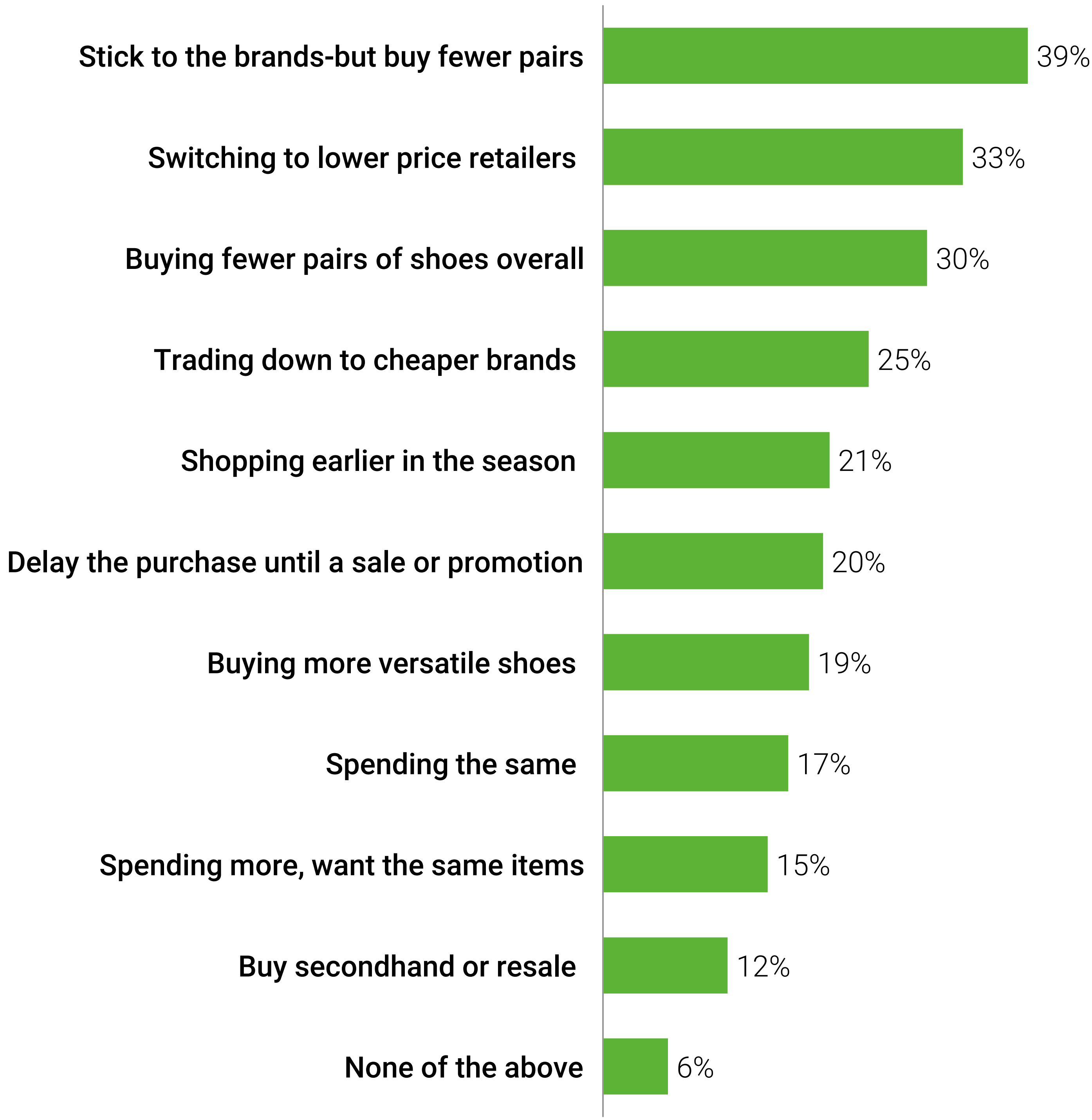
Despite consumers indicating noticeable price differences to last year, it appears that believe they are still getting value for their money

Price perception’s impact on value
All future shoe purchases



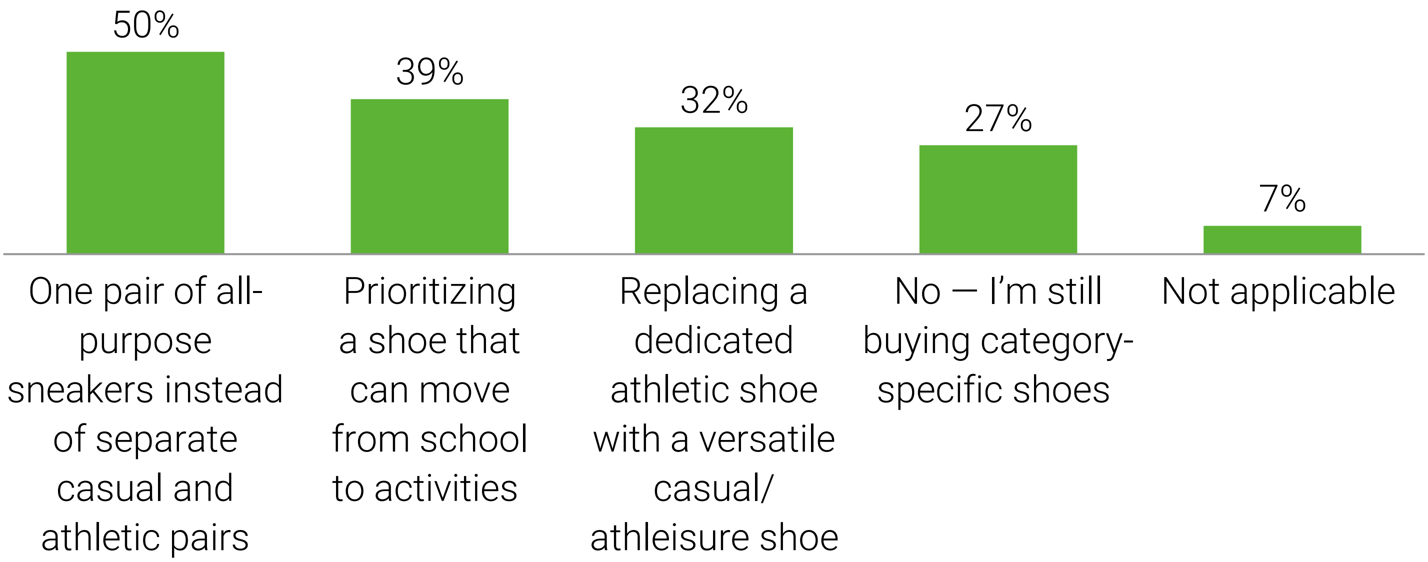
Consumers are more likely to switch retailers for price before they switch brands they are purchasing. They'd rather cut back on number of shoes purchased.

Cost-savings measures consumers are either doing or planning on doing
Back-to-school purchases



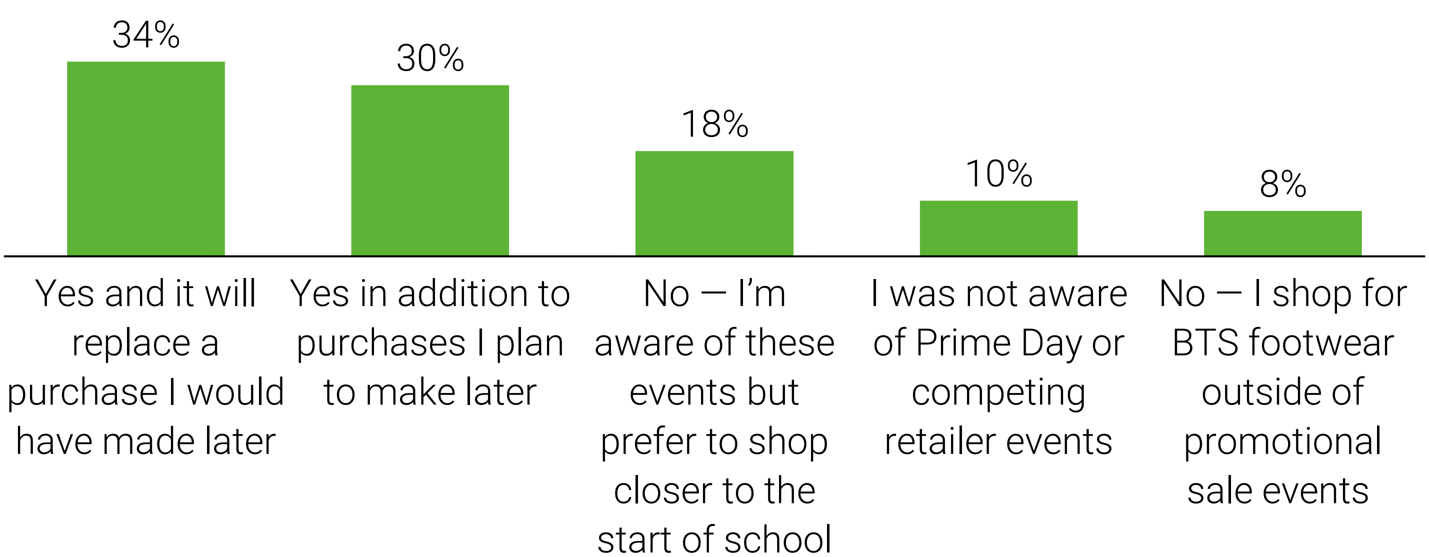
Consolidation leads the trade-offs: 50.3% would choose one all-purpose sneaker instead of several specialized pairs.

Deliberate trade-offs between shoe types
Back to school purchases



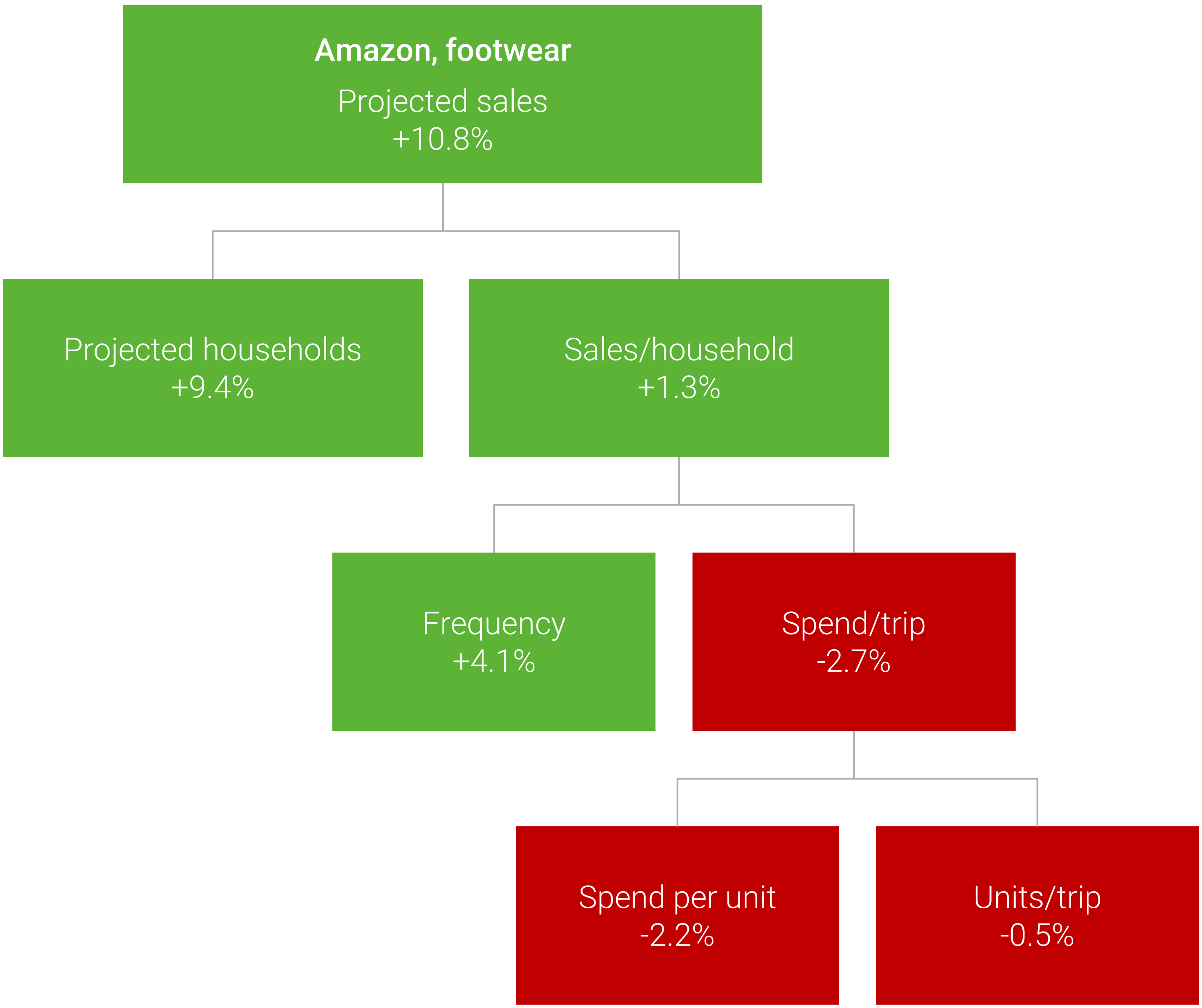
64% of consumers are going to engage in Prime Day or competitor events for BTS shopping. Half will replace other purchases and half are incremental purchases.

Engagement in Amazon Prime Day or competitor events
Back-to-school purchases



Amazon has been growing the footwear category through increase in households and higher frequency of purchase. Unit spend is down, unlike the rest of the category.

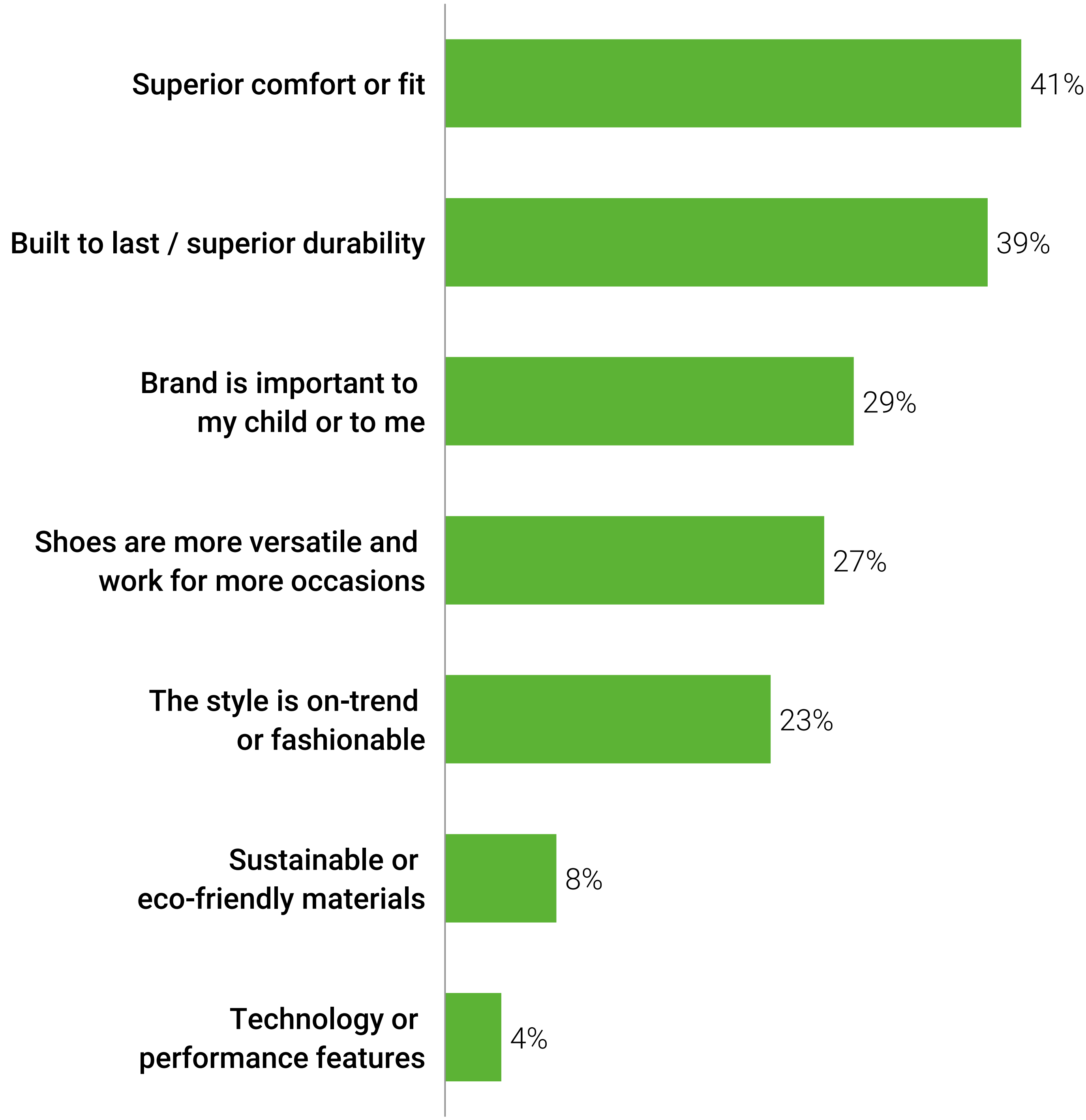
Amazon footwear YOY category performance metrics
Consumer receipt panel



Source: Numerator, Consumer Receipt Panel, LTM ending 6/7/26 Amazon Purchase Footwear Category

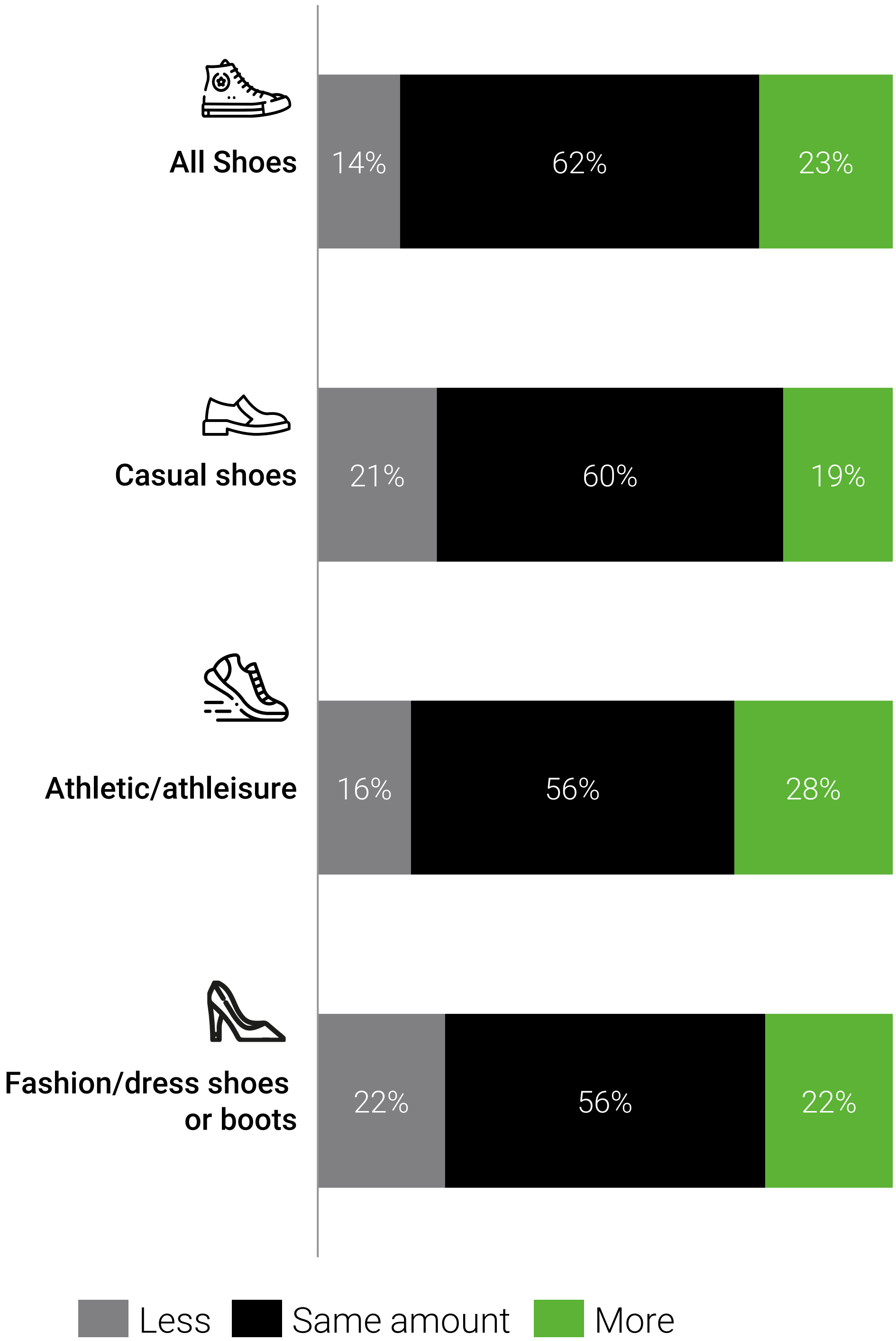
In previous surveys, things like performance features were a key driver of incremental spend. However, when shopping for children, comfort and durability reign supreme.

What would drive a consumer to spend more on a pair of shoes
Back-to-school purchases



Similar to last year, consumers expect to spend more on athletic shoes than other categories, with an estimated net increase of 11%

Estimated spend by category
Back-to-school purchases



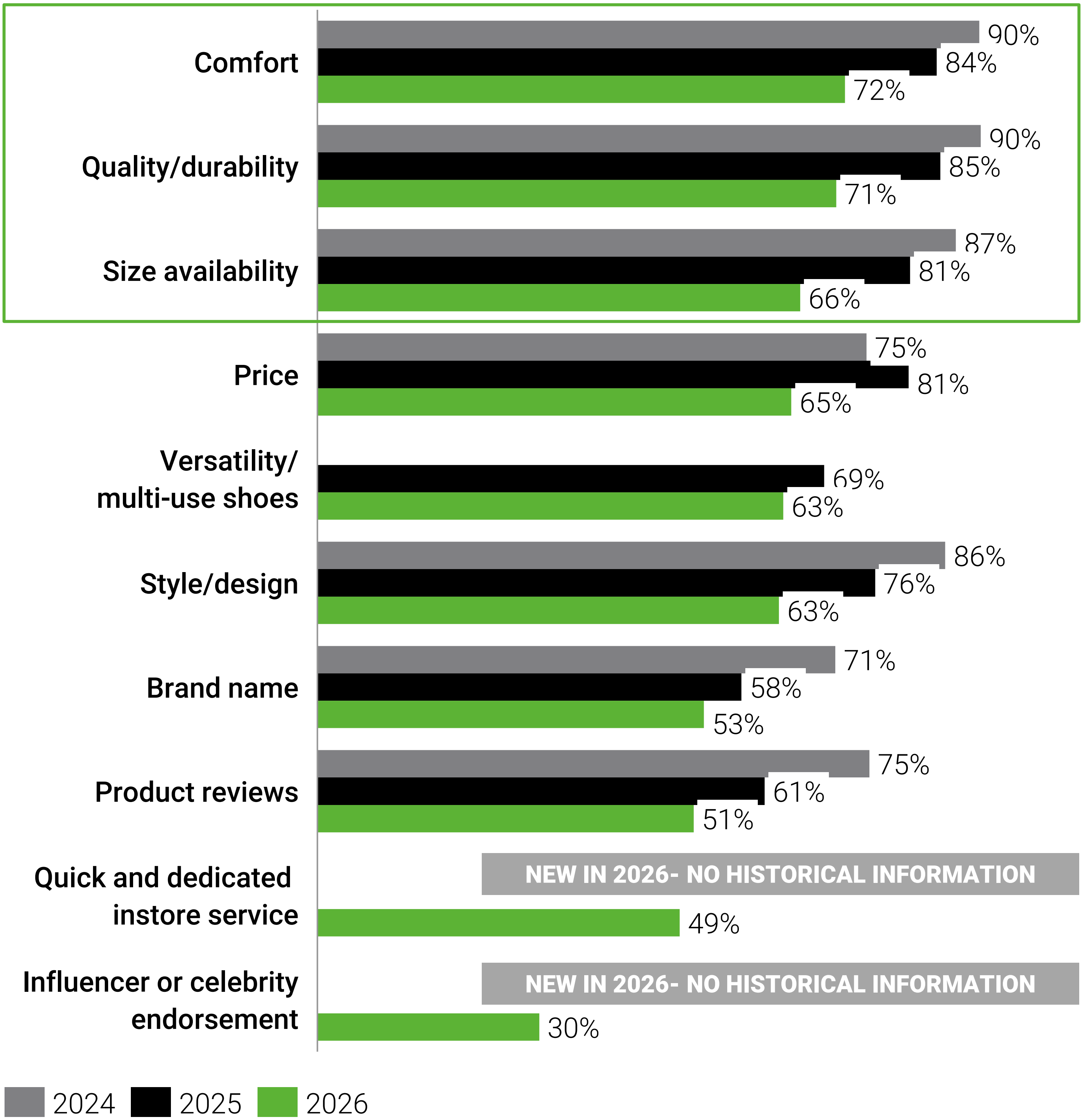
Net more or less by category

	2024	2025	2026
All Shoes	▲20%	▲23%	▲9%
Casual shoes	▲6%	▲7%	▼2%
Athletic/athleisure	▲22%	▲28%	▲11%
Fashion/dress shoes or boots	▲2%	▲3%	0%

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.

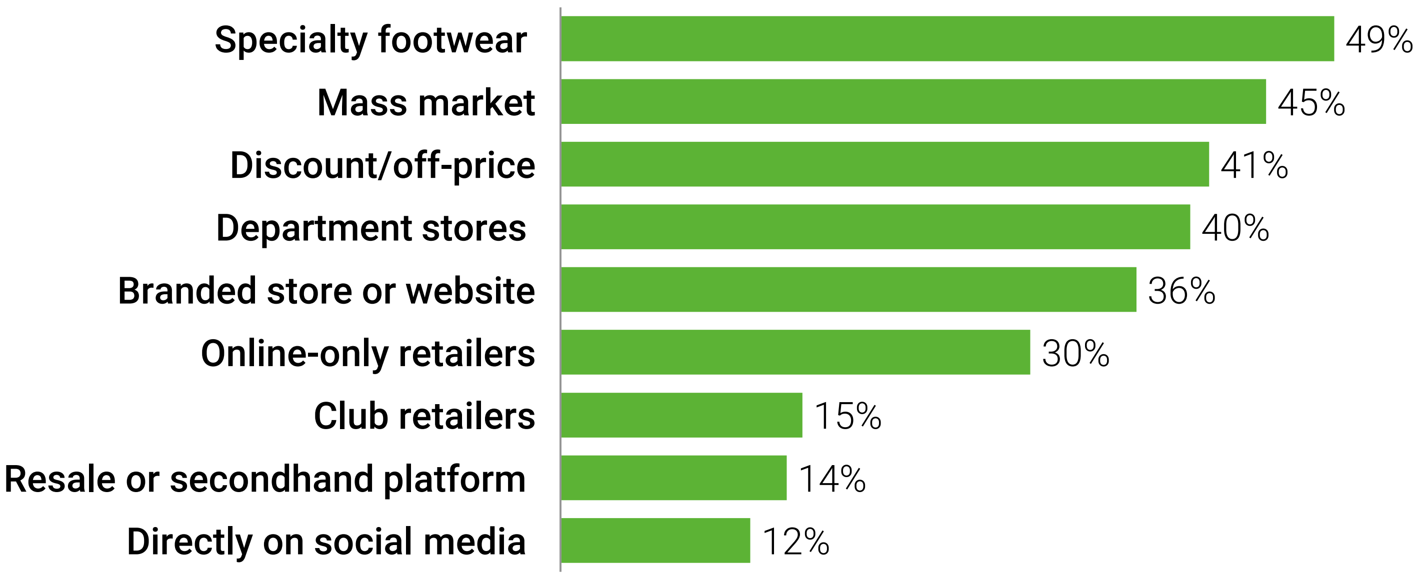
What drives what product a customer purchases

Back-to-school purchases: important and very important

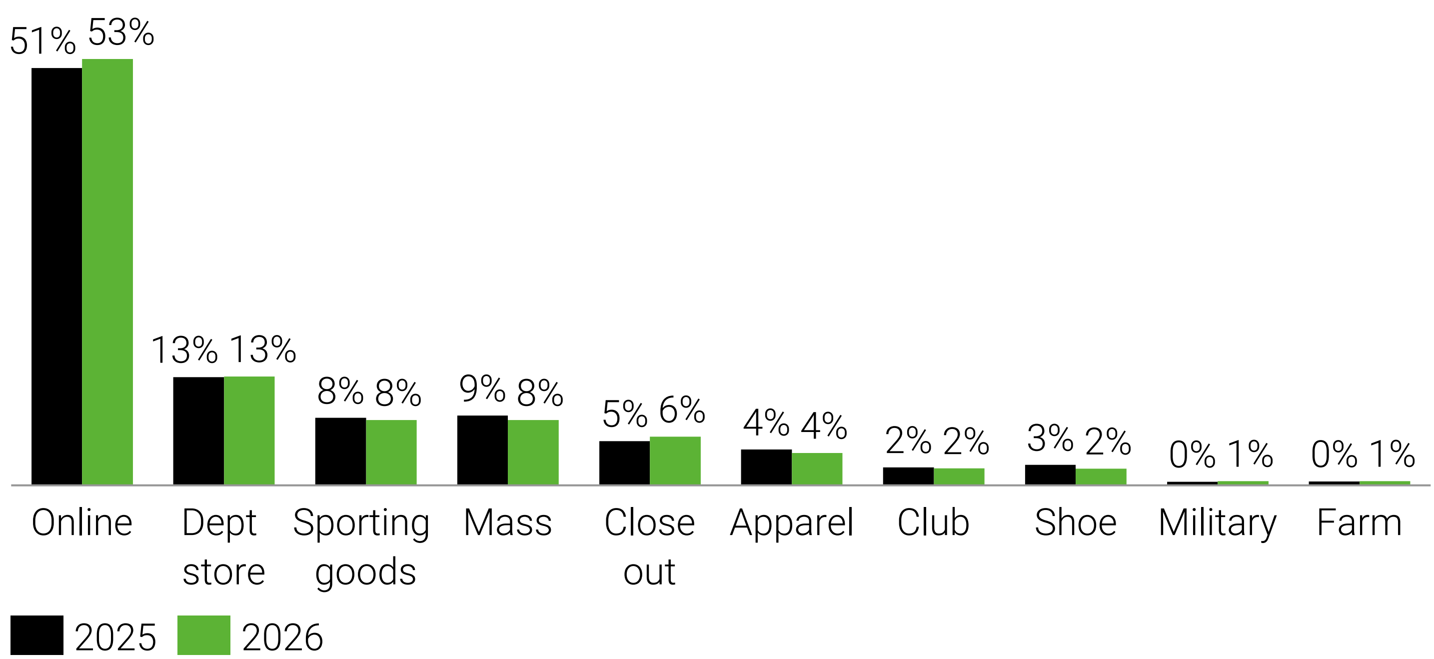


Specialty and mass are the most widely shopped among us consumers this year. About half of purchases are done in-store and half online.

Types of retailers consumers will shop at
Back-to-school purchases

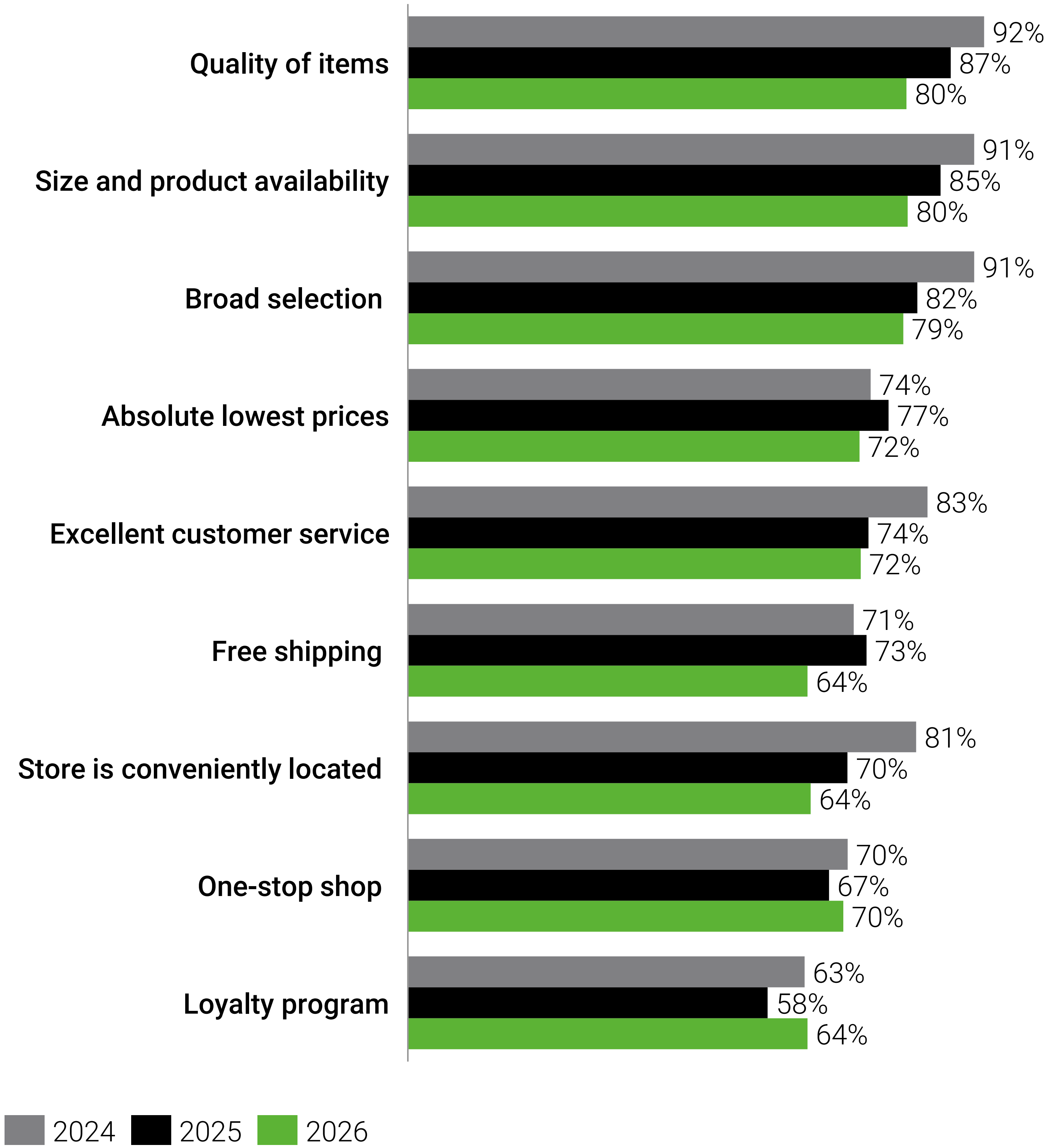


Consumer spend by channel rolling 12 months ending 6/30 vs. prior year
Back-to-school purchases: Consumer receipt panel YOY change



Consumers are shopping around and are prioritizing quality, size and selection.

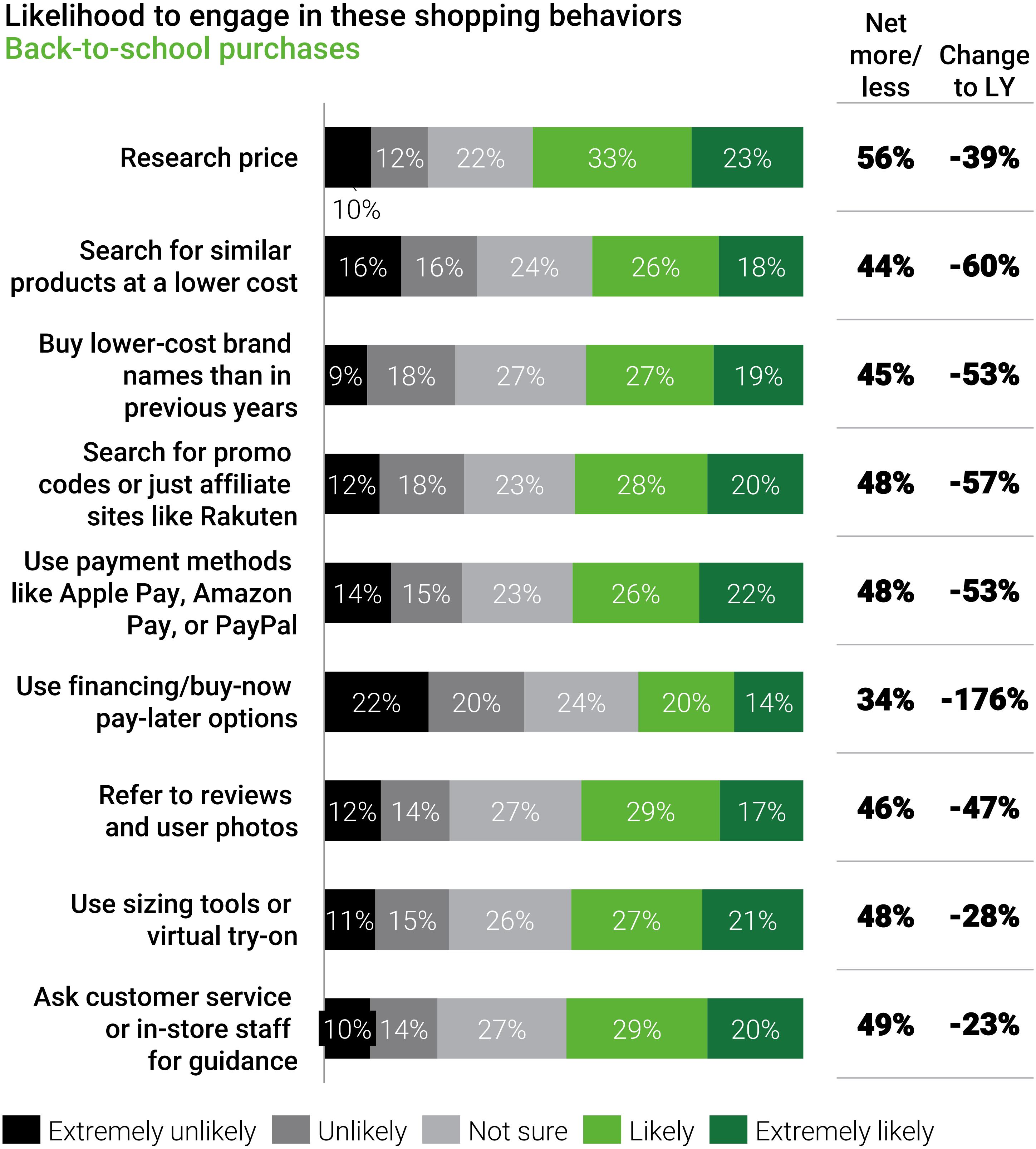
What drives where a consumer decides to shop
Back-to-school purchases



Consumers continue to engage in cost savings activities like price research and promo code searches. However, they are getting tired of putting in the work.

Likelihood to engage in these shopping behaviors

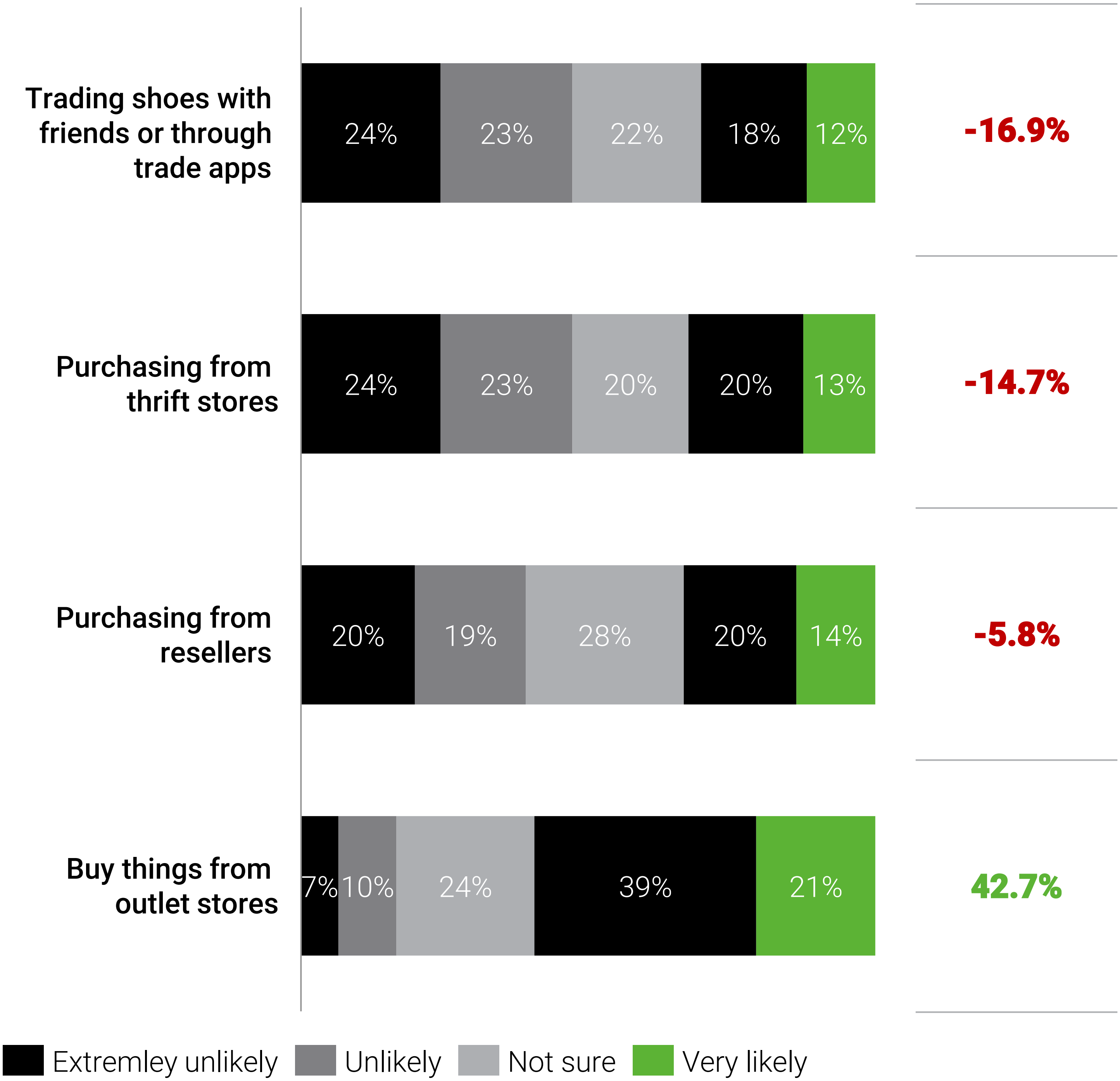
Back-to-school purchases



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

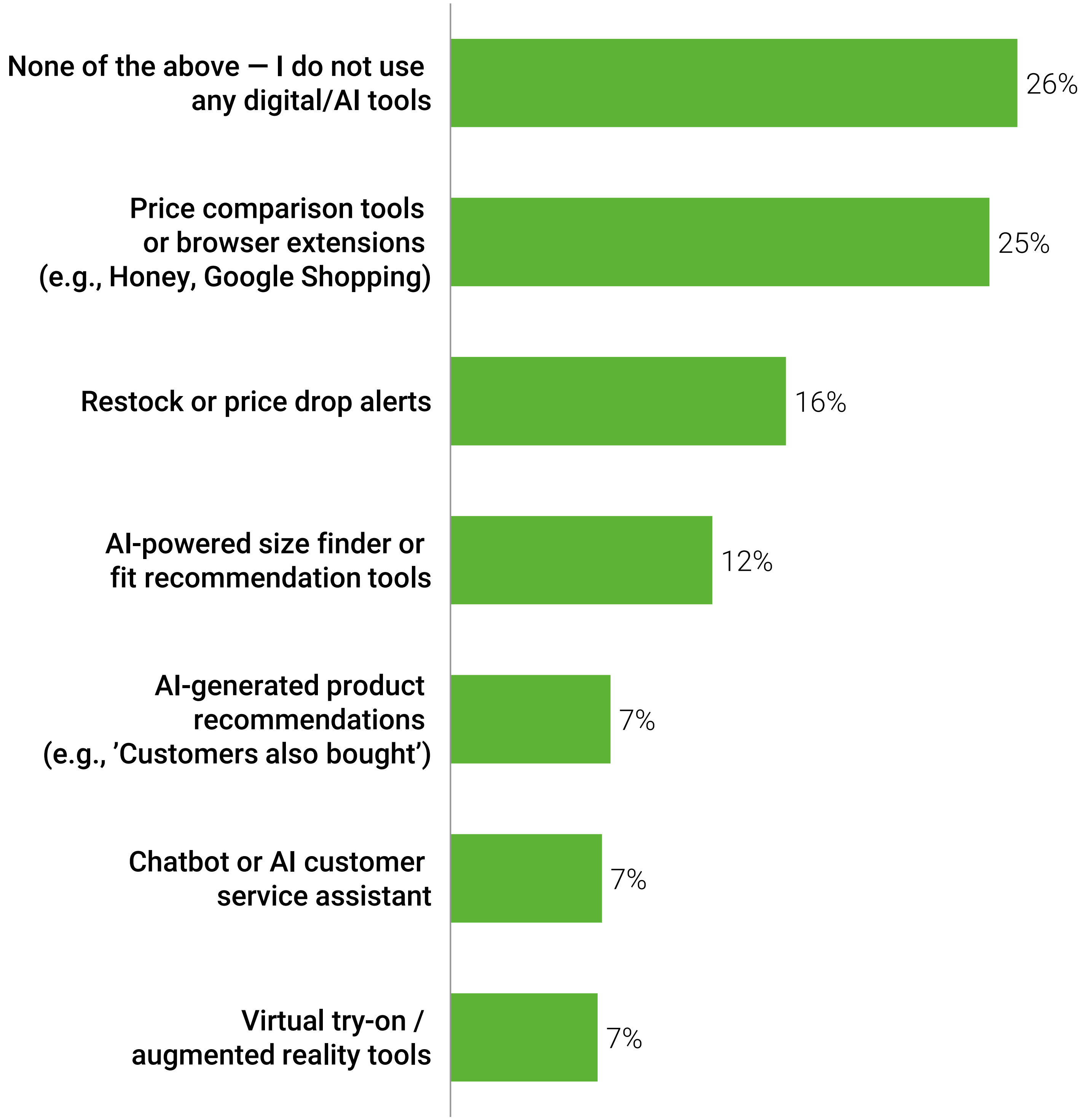
Net likelihood of consumers to purchase
Back-to-school purchases

Net more or less by category



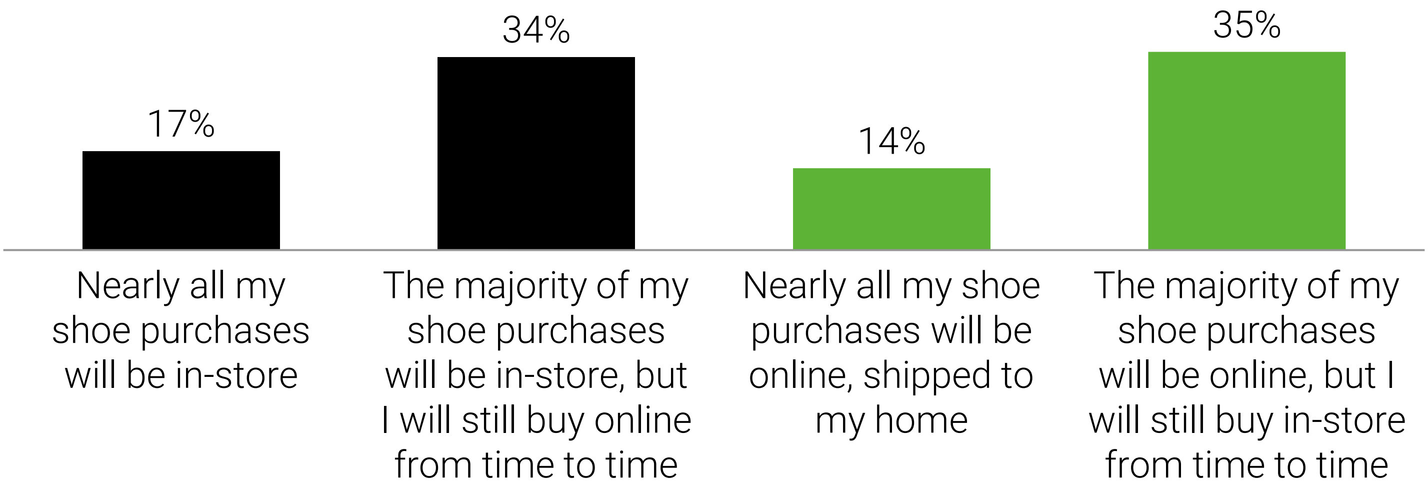
More than a quarter of consumers don’t use any AI tools; those who do are primarily using them for cost savings search & alerts

What AI tools consumer find helpful for BTS shopping
Back-to-school purchases



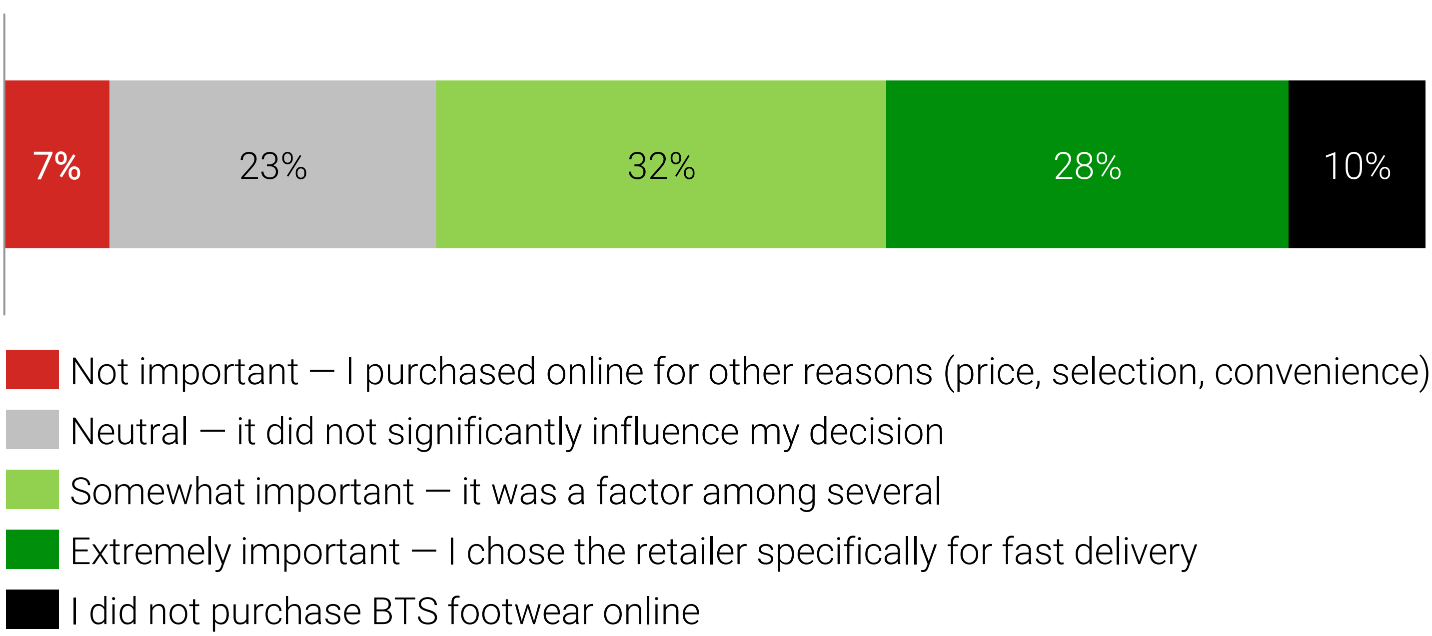
The future is omnichannel and near-evenly split: 34.6% mostly-online vs 33.7% mostly-in-store; few go exclusively one way.

Purchase channels
Back-to-school purchases



Delivery speed matters to most online shoppers: 31.6% somewhat important and 28.3% extremely important.

Importance of delivery speed on online purchases
All future shoe purchases



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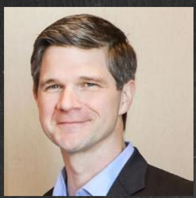
Contact the authors



Matt Priest
President & CEO
FDRA
mpriest@fdra.org

Andy Polk
Senior Vice President
FDRA
apolk@fdra.org

Bryan Eshelman
Partner & Managing Director
AlixPartners
beshelman@alixpartners.com

Sonia Lapinsky
Partner & Managing Director
AlixPartners
slapinsky@alixpartners.com

Andrew Hogenson
Partner & Managing Director
AlixPartners
ahogenson@alixpartners.com

Amit Mahajan
Partner
AlixPartners
amitmahajan@alixpartners.com

Meghan Hayward
Director
AlixPartners
mhayward@alixpartners.com

Courtnay East
Director
AlixPartners
ceast@alixpartners.com

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.