

# MEN'S & WOMEN'S FOOTWEAR – US – 2023

Footwear is a central part of consumers' wardrobes. They look to brands to help them express their styles and interests, and keep them comfortable across occasions.



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# Men's & Women's Footwear - US - 2023

## This report looks at the following areas:

- Types of footwear purchased
- Reasons for purchasing footwear
- Behaviors when shopping for footwear
- Price points of footwear purchases
- Attitudes towards footwear and sustainability in footwear
- Footwear brands of interest

## Overview

The majority of consumers (68%) closely link shoes and their mood, showing the need for brands to demonstrate how wearing their specific footwear can provide a confidence boost or elicit other positive feelings. Brands could look to sort their offerings by affirmations (eg "I am confident" or "I am strong") to communicate how their shoes support consumers' endeavors. Furthermore, brands can lean on the emotional impact in marketing materials to connect with consumers.

Inflation continues to pester consumers' wallets. As they continue to deal with elevated prices, consumers will need to carefully choose where they spend their money. This means that monetary and non-monetary value will be at the heart of shoe purchases.

Showing consumers the value their brand and shoes can offer will also help brands differentiate themselves in a crowded marketplace. With new entrants popping up frequently, it will be critical to stand out and establish connections with consumers.



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Opportunities also exist for brands to tap into the ongoing trend of consumers preferring more casual styles that can be worn across occasions. Additionally, brands can look to appeal to shoe-fanatics by creating limited, unique designs and styles that drum up excitement.

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# Report Content



## EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

## CONSUMER INSIGHTS

### Consumer fast facts

#### Types of footwear purchased

- Consumers gravitate toward casual shoes as society becomes more relaxed
  - Graph 1: types of footwear purchased in the last 12 months, 2023
- Brands can connect with women especially around flats, sandals
  - Graph 2: types of footwear purchased in the last 12 months, by gender, 2023
- Consumers are compiling their shoe collections
  - Graph 3: number of pairs owned, 2023
- Sneaker culture contributes to younger men's larger shoe collections
  - Graph 4: number of pairs owned, by gender and age, 2023
- Younger women are on track to purchase greater shoe quantities like their older counterparts

#### Retailers shopped for footwear

- While consumers gravitate toward in-store shopping, online purchases continue to rise
  - Graph 5: retailers shopped for footwear in last 12 months, 2023
- Women are more likely to seek out retailers with knowledgeable associates, lower-priced stores
  - Graph 6: retailers shopped for footwear in last 12 months – any channel, by gender and age, 2023
- Discount stores are a win for women purchasing shoes for one-off occasions

#### Reasons for purchasing footwear

- Consumers purchase shoes for practical and impulsive reasons
  - Graph 7: reasons for purchasing footwear, 2023
- Shoppers also use the practical to rationalize the impulsive
- Across genders, younger consumers show more openness to buying for various reasons
  - Graph 8: reasons for purchasing footwear, by gender and age, 2023
- Help younger consumers lean into their impulse buys

## Footwear shopping behaviors

- The store remains a critical part of the footwear purchase journey
  - Graph 9: behaviors when shopping for footwear, 2023
- Brands can focus on emotional, intangible benefits of their footwear products
- Younger consumers are inspired by their virtual surroundings
  - Graph 10: behaviors when shopping for footwear, by gender and age, 2023
- Spotlight shoes as the perfect gift for younger consumers
- Omnichannel options are a priority for multicultural consumers
  - Graph 11: behaviors when shopping for footwear, by race, 2023

## Price points

- Consumers are open to a variety of price points with limits in certain categories
  - Graph 12: willingness to pay, by shoe type, 2023
- Brands have an opportunity for higher pricing in men's shoes
  - Graph 13: willingness to pay, by gender and shoe type, 2023

## Attitudes toward footwear

- Consumers need their shoes to support their more casual lifestyles
  - Graph 14: attitudes toward shopping for footwear – shopping experience, 2023
- Shoes are becoming even more of a cornerstone to men's outfits and a key aspect of their style
- Women consider the overall value of a shoe before purchase
- Guidance and expertise when shoe shopping is appreciated – especially for men
  - Graph 15: attitudes toward shopping for footwear – salesperson expertise – agree, by gender, 2023
- Shoes are an integral part of the wardrobe for multicultural consumers
  - Graph 16: attitudes toward shopping for footwear – agree, influence on outfit, by race/ethnicity; gender and race/ethnicity, 2023
- Brands should look for opportunities to engage with and support multicultural communities
- Shoes impact consumers from head to toe

## Attitudes toward sustainability in footwear

- Consumers expect brands to develop a more sustainable way to purchase footwear
  - Graph 17: attitudes toward sustainability in footwear, by gender and age, 2023
- Secondhand shopping options help consumers stretch their dollars
  - Graph 18: attitudes towards sustainability in footwear, by household income, 2023
- Transparency around cleanliness will help consumers feel more comfortable purchasing secondhand footwear
  - Graph 19: general attitudes toward shopping for footwear – sustainability, 2023
- Younger consumers see sustainability as a necessity to purchase shoes
  - Graph 20: general attitudes toward shopping for footwear – sustainability, by generation, 2023

## Footwear brands familiarity and interest

- Top name brands catch consumers' eye, with smaller brands gaining interest
  - Graph 21: brands of interest, 2023
- DTC shoe brands have an opportunity to capitalize on growing interest amongst consumers
- Younger consumers embrace a variety of shoe brands, including those thought to cater to older generations
  - Graph 22: select brands of interest – net, by gender and age, 2023
- Collaborations help Converse thrive with younger shoppers

## THE MARKET

### Market context

### Market drivers

- Inflation remains an issue for consumers
  - Graph 23: Consumer Price Index change from previous year, 2021-2023
- While slowing, the effects of lingering inflation will fester in the coming months
- A more casual society needs more casual footwear
- The footwear industry needs brands to want to be sustainable, environmentally-conscious

### Market size and forecast

- Retail sales and forecast of footwear
- Collaborations, collectables and casualization contribute to footwear's increase

## COMPETITIVE STRATEGIES

### Competitive strategies and market opportunities

- Canada Goose steps into the sneaker game
- The opportunity: expand outside of typical product lines
- Crocs' quirky launches lean into fun, playfulness
- The opportunity: look for ideas that don't fit into the traditional shoebox
- Allbirds' new sneaker hones in on versatility in effort to be a partner to the busy everyday consumer
- The opportunity: bring versatility into shoes to provide greater value to consumers
- Nike expands physical retail presence with new Nike store concepts
- The opportunity: leverage physical retail to integrate experiences into the shoe shopping journey
- Adidas wields its storytelling powers, nostalgia to captivate on social media
- The opportunity: tap into storytelling to evoke emotion with footwear consumers

## APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Forecast
- Forecast fan chart

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