

2026

LEK™

SPECIAL REPORT

US Footwear, Apparel, and Accessories Brand Heat Index



Contents

- About the Brand Heat Index**3
- 2026 Noteworthy consumer trends**4
- Footwear**5
 - Athletic footwear6
 - Casual footwear 8
 - Outdoor/rugged footwear..... 10
 - Dress footwear11
- Apparel** 14
 - Athletic clothing 15
 - Casual clothing..... 17
 - Outdoor clothing 19
 - Dress clothing..... 21
- Bags & luggage** 23
- Outdoor equipment & sporting goods**.....24
- Conclusion** 25
- About the Authors** 26

About the Brand Heat Index

In a market where consumers are more selective, and loyalty is harder to earn, Brand Heat has become a leading indicator of sustainable growth. L.E.K. Consulting’s 2026 US Footwear, Apparel, and Accessories Brand Heat Index measures relative brand popularity across major footwear and apparel categories and, for the first time this year, includes bags & luggage and outdoor equipment & sporting goods. Importantly, our index breaks this down by gender and generational cohort, demonstrating how “heat” differs across consumer segments and allowing brands and retailers to enhance their strategic decision-making.

The Brand Heat Index is based on a survey of thousands of U.S. consumers who have recently purchased footwear, apparel or related goods. Brands receive a heat score on a standardized index – the higher the score, the hotter the brand.

L.E.K.’s Brand Heat Index methodology



Following this framework, the Brand Heat Index identifies brands with the strongest upward trajectory among shoppers, rather than reflecting relative size or scale.

The survey captures feedback on brands across four footwear and apparel use case categories: athletic, casual, outdoor or rugged, and dress. Bags & luggage and outdoor equipment are also assessed.

Category definitions

		Footwear	Apparel			
Examples	Athletic	Athletic sneakers, basketball shoes, cleats	Performance tops, athletic shorts, joggers, leggings, surf/skate clothing	Examples	Bags & luggage	Outdoor equipment & sporting goods
	Casual	Sandals, slip-ons, casual flats, casual sneakers, chukka boots	Denim, cotton T-shirts, sweaters, oxford shirts, khakis		Backpacks, tote bags, duffel bags, suitcases, carry-ons, travel bags	Camping and backpacking gear, cycling equipment, fishing and boating equipment, golf, hunting, ski and snow sports equipment
	Outdoor	Hiking boots, trail shoes, winter boots, work boots	Hiking clothes, fishing clothes, fleeces, performance jackets			
	Dress	Heels, loafers, oxfords	Suiting, dresses			

2026 Noteworthy consumer trends

- Outdoor and athletic categories continue to have the highest heat scores overall, benefited by an enthusiast consumer base that looks to these brands for both performance and lifestyle wearing occasions.
- Competition at the top is increasingly intense, with seven out of 16 apparel and footwear categories tested showing the top three brands within 10 points of each other (up from only four categories in 2025).
- Across categories, the top brands are disproportionately viewed as “premium” brands by consumers — the exception to this is casual apparel and footwear, where accessibly priced brands and fast fashion players have a strong position.
- Consumer feedback indicates that a strong social media presence is a core driver of brand heat, particularly among younger generations, where TikTok-viral emerging brands make the Top 10 list in several categories.
- Importantly, brand heat differs meaningfully by gender and generation, with women and younger generations having a higher proportion of newcomer brands on their Top 10 lists. Increasingly, we are seeing brands leverage their strength with women to develop a material men’s business as well.

In the pages that follow, the Top 10 brands are ranked by their heat scores within each product category — both in total and by generational cohort.

How does your brand stack up?

Footwear

In 2026, competition in the footwear space remains intense, with brand heat scores tightly clustered at the top across multiple categories. Athletic and casual footwear continue to draw the strongest engagement overall, though athletic footwear heat has declined slightly year over year, suggesting some softness in the category, consistent with decelerating market growth (as reported by Circana).¹

Premium brands are rising in the ranks across categories, whether On Running in athletic, Arc'teryx and Salomon in outdoor, UGG in casual or Coach in dress footwear.

Relative to apparel, footwear rankings show greater consistency across genders, with many of the same brands appearing in the Top 10 for both women's and men's footwear within a given category (see Figures 1 and 2).

Figure 1 Women's footwear

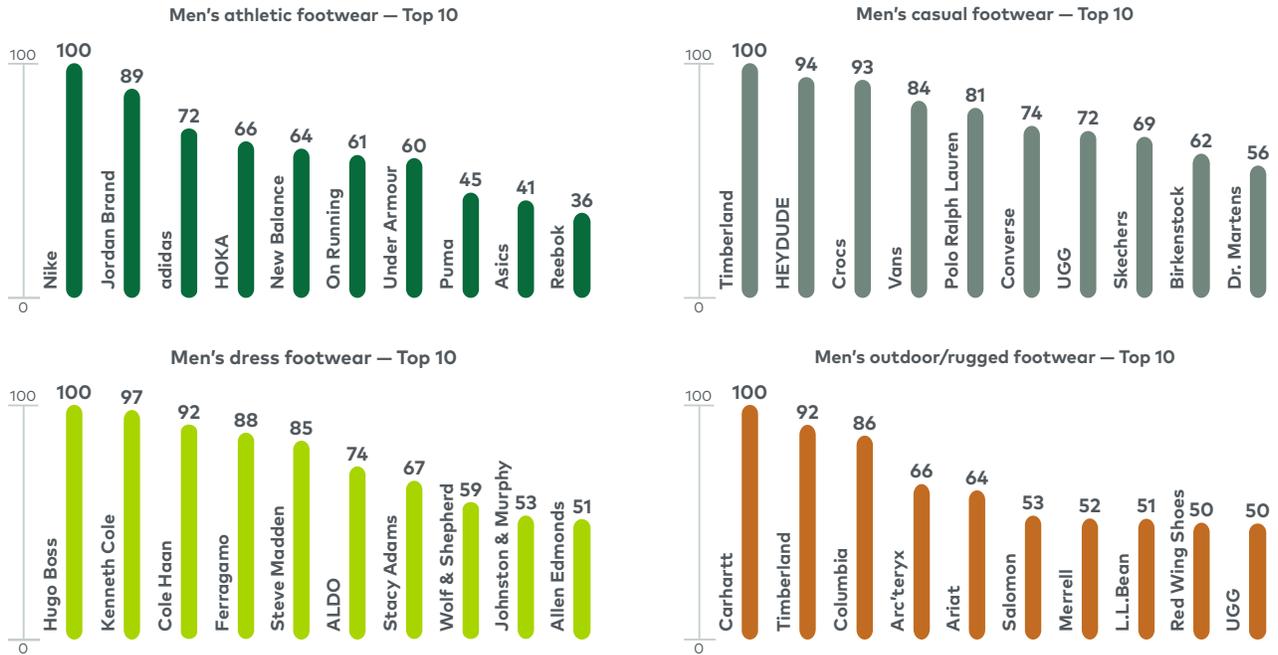
Brands ranked on a scale of 1-100



Source: L.E.K. survey and analysis

Figure 2 Men's footwear

Brands ranked on a scale of 1-100



Source: L.E.K. survey and analysis

Athletic footwear

Key themes:

- While the Top 10 brands in athletic footwear remain fairly consistent year over year and across genders, competition within the top tier remains tight.
- **Nike** held on to its position as the No. 1 brand overall for both women's and men's athletic footwear, but **HOKA** and **On Running** follow closely behind, particularly among women.
- Running-heritage brands continue to broaden their strong trajectory, with **New Balance** and **Asics** in the Top 10 across both genders and **Brooks** gaining ground with women.

Noteworthy moves — Women's athletic footwear

- Nike retains the top spot overall, with HOKA narrowly edging out On Running for second place, as the top three brands remain tightly clustered.
- Nike leads among Millennial women, while On Running ties for the top spot among Gen Z, and HOKA emerges as the top brand among Gen X, highlighting subtle generational differences at the top of the category.

- adidas maintained its performance year over year, tying for No. 4 overall, driven by continued growth among Gen Z, though more stable performance with Millennials and Gen X.
- New Balance and Brooks have continued a positive trajectory with scores increasing materially across generations, while Asics enters the Top 10 driven by particularly strong performance among Gen Z (see Figure 3).

Figure 3 Women’s athletic footwear – Top 10, by generation

	Total	Gen Z	Millennial	Gen X
1	Nike 100	Nike/ On Running 100	Nike 100	HOKA 100
2	HOKA 92		HOKA 84	On Running 99
3	On Running 91	Jordan Brand 91	Jordan Brand 77	Nike 92
4	Jordan Brand 76	HOKA 86	On Running 75	New Balance 66
5	adidas/ New Balance 70	New Balance 85	adidas 68	Under Armour/ adidas 63
6		adidas 81	Brooks/ Under Armour 67	
7	Brooks 62	Asics 71		Jordan Brand 60
8	Under Armour 61	Brooks 66	New Balance 62	Altra 56
9	NoBull/ Asics 44	Under Armour 54	NoBull 49	Brooks 54
10		Saucony 53	Reebok 42	Ryka 43

Source: L.E.K. survey and analysis

Noteworthy moves – Men’s athletic footwear

- Legacy brands maintain the top three spots among men, with Nike, Jordan Brand and adidas topping the charts.
- However, HOKA, New Balance and On Running are finally closing the gap among men, tightly clustered behind the industry behemoths. New Balance performs particularly well with Gen Z and Millennials, while HOKA takes the No. 2 spot among Gen X men.
- In this context, Under Armour fell from fourth to seventh as the running brands climb higher (see Figure 4).

Figure 4 Men’s athletic footwear — Top 10, by generation

	Total	Gen Z	Millennial	Gen X
1	Nike 100	Nike 100	Nike 100	Nike 100
2	Jordan Brand 89	Jordan Brand 86	Jordan Brand 89	HOKA/ 93
3	adidas 72	adidas 68	adidas 72	Jordan Brand
4	HOKA 66	New Balance 61	New Balance 66	On Running 77
5	New Balance 64	On Running 55	HOKA 62	adidas/ 74
6	On Running 61	Under Armour 52	Under Armour 59	Under Armour
7	Under Armour 60	Asics/ 49	On Running 56	New Balance 65
8	Puma 45	HOKA	Puma 55	Puma 41
9	Asics 41	Saucony 44	Reebok 42	Reebok 37
10	Reebok 36	Puma 35	Asics 41	Brooks 36

Source: L.E.K. survey and analysis

Casual footwear

Key themes:

- Brands with distinctive, iconic silhouettes remain on top in casual footwear for both women and men, as a combination of **UGG, HEYDUDE, Crocs** and **Timberland** take the top three spots in most cohorts.
- **Converse, Vans** and **Birkenstock**, also known for their iconic franchises, sit in the next tier of brand heat.
- Comfort is clearly a continued consideration for consumers, with **Skechers** showing up in the Top 10 overall for both men and women, and **Oofos** entering the Top 10 on the women’s side.

Noteworthy moves — Women’s casual footwear

- UGG holds the top spot overall, with HEYDUDE and Crocs close behind, keeping the top of the list firmly comfort-led and driven by distinctive silhouettes.
- HEYDUDE takes the lead among both Millennial and Gen X women, while UGG and Crocs outperform with Gen Z.
- Frye’s strength with Gen Z appears to have been short-lived, as it falls out of the Top 10, while Tory Burch enters, driven by the generation’s interest in nostalgic styles and several products that have gone viral on social media.
- Gen X continues to show its differential interest in comfort and versatility, with Skechers coming in at No. 2, and Oofos, Kizik and Vionic all making the Top 10 (see Figure 5).

Figure 5 Women’s casual footwear – Top 10, by generation

	Total		Gen Z		Millennial		Gen X	
1	UGG/	100	UGG	100	HEYDUDE	100	HEYDUDE	100
2	HEYDUDE		Crocs	88	Crocs	99	Skechers	96
3	Crocs	99	HEYDUDE	71	UGG	91	UGG	77
4	Converse	73	Converse	68	Converse	75	Crocs	76
5	Vans	72	Birkenstock	66	Vans	72	Vans	72
6	Birkenstock	67	Dr. Martens	65	Birkenstock	67	Oofos	66
7	Oofos/	58	Timberland	63	Skechers	53	Kizik	65
8	Skechers		Vans	62	Timberland	51	Vionic	61
9	Timberland	56	Tory Burch	57	Princess Polly	49	Converse/	
10	Dr. Martens	48	Princess Polly	54	Dr. Martens	42	Birkenstock	60

Source: L.E.K. survey and analysis

Noteworthy moves – Men’s casual footwear

- Timberland jumps to the top spot overall (relative to its No. 3 position last year), showing particular strength with Gen Z and Millennials, as the business has made concerted efforts to reignite the brand through its “always-on icon” strategy.
- HEYDUDE and Crocs take the No. 2 and No. 3 positions overall, with Crocs leading Gen Z while HEYDUDE tops the list for Gen X, having slid down the list for younger consumers.
- Interestingly, Gen X men show more interest in emerging premium brands, with Axel Arigato, Golden Goose and Greats making the Top 10 (see Figure 6).

Figure 6 Men’s casual footwear – Top 10, by generation

	Total		Gen Z		Millennial		Gen X	
1	Timberland	100	Crocs	100	Timberland	100	HEYDUDE	100
2	HEYDUDE	94	UGG	89	Crocs	91	Skechers	77
3	Crocs	93	Timberland	88	Vans	90	Axel Arigato	63
4	Vans	84	Polo Ralph Lauren	78	Polo Ralph Lauren	83	Timberland	55
5	Polo Ralph Lauren	81	Birkenstock	72	Converse	83	Golden Goose	50
6	Converse	74	Vans	69	HEYDUDE	81	Vans	48
7	UGG	72	HEYDUDE	67	Skechers	72	Converse	45
8	Skechers	69	Tommy Hilfiger	63	Dr. Martens	67	Thursday Boots	41
9	Birkenstock	62	Converse	55	Birkenstock	67	Greats	40
10	Dr. Martens	56	Lacoste	55	UGG	66	Oofos	40

Source: L.E.K. survey and analysis

Outdoor/rugged footwear

Key themes:

- Heritage outdoor and workwear brands still anchor the category, but men skew more toward rugged/workwear (e.g., **Carhartt, Timberland**) while women lean more toward winter lifestyle (e.g., **UGG, Bearpaw**).
- Premium technical brands, like **Arc'teryx** and **Salomon**, are showing the biggest gains, particularly among men.
- The top brands perform fairly consistently across generations, while cohort differences emerge as you move down the list.

Noteworthy moves – Women’s outdoor footwear

- UGG remains No. 1 overall, followed by The North Face, whose scores are softening, and Carhartt, which is showing increased strength (ultimately achieving No. 2 in Gen Z and No. 1 among Gen X).
- Bearpaw was one of the top gainers, with brand heat growth driven by strong performance among Millennials and Gen X. Merrell, on the other hand, fell out of the Top 10 overall, though the brand still shows up on Millennial and Gen X lists.
- Hunter Boots are having a resurgence, re-entering the Top 10 at No. 8 overall, with solid performance across generations (see Figure 7).

Figure 7 Women’s outdoor/rugged footwear – Top 10, by generation

	Total	Gen Z	Millennial	Gen X
1	UGG 100	UGG 100	UGG/ 100	Carhartt 100
2	The North Face 87	Carhartt 75	The North Face 100	UGG 98
3	Carhartt 86	The North Face 68	Carhartt 84	The North Face 90
4	Columbia/ 67	Timberland 59	Columbia 70	Columbia 85
5	Timberland 67	Ariat 53	Timberland 66	Timberland 76
6	Ariat 59	Hunter Boots 52	Bearpaw 64	Sorel 71
7	Bearpaw 58	Columbia 48	Arc'teryx 58	Hunter Boots/ 70
8	Hunter Boots 52	Bearpaw 41	Ariat 57	Bearpaw 70
9	Arc'teryx 49	Sorel 35	Danner/ 46	Merrell 69
10	Sorel 45	Chaco 32	Merrell 46	Ariat 67

Source: L.E.K. survey and analysis

Noteworthy moves – Men’s outdoor/rugged footwear

- Carhartt moves to No. 1 overall, surpassing Timberland across all rankings (except for Gen Z), while Columbia remains firmly third.
- Premium technical brands Arc’teryx and Salomon are the top gainers – Arc’teryx surges to No. 4 overall (and among Millennials and Gen X) and Salomon comes in at No. 6, with particular strength among Millennials.
- On the other hand, CAT Footwear fell out of the Top 10 overall and UGG dropped down the list to No. 10 (see Figure 8).

Figure 8 Men’s outdoor/rugged footwear – Top 10, by generation

	Total	Gen Z	Millennial	Gen X
1	Carhartt 100	Timberland 100	Carhartt 100	Carhartt 100
2	Timberland 92	Carhartt 95	Timberland 87	Timberland 92
3	Columbia 86	Columbia 89	Columbia 83	Columbia 90
4	Arc’teryx 66	UGG 76	Arc’teryx 73	Arc’teryx 79
5	Ariat 64	BRUNT 74	Salomon 69	Ariat 64
6	Salomon 53	Ariat 73	Ariat 61	La Sportiva 62
7	Merrell 52	Red Wing Shoes 71	Merrell 57	KEEN 57
8	L.L.Bean 51	L.L.Bean 61	CAT Footwear 55	Merrell 56
9	Red Wing Shoes/ UGG 50	Arc’teryx 48	L.L.Bean 54	Salomon 50
10		Merrell 47	Danner 49	Sorel 44

Source: L.E.K. survey and analysis

Dress footwear

Key themes:

- Relative to other footwear categories, the Top 10 brands in dress footwear are quite varied across genders, with only **Steve Madden** showing up on both the women’s and men’s lists.
- Despite limited brand overlap, accessible luxury appears to be a common theme in the category across both genders, with dress being the most style-driven of the footwear categories (as opposed to comfort, performance, or other selection criteria).
- Interestingly, generational differences are more prominent for men than for women.

Noteworthy moves – Women’s dress footwear

- Accessible luxury brand Coach holds the top spot overall and leads all three generations, but consistent with the company’s strategy, the brand received the highest scores from Gen Z consumers.
- The rest of the upper tier stays largely in place, with Michael Kors, Steve Madden, Kate Spade and Calvin Klein continuing to round out the top of the ranking, though the gap between these brands and Coach has widened.
- Kurt Geiger moved up to No. 6 as the brand makes a push in the U.S. market, and Dolce Vita entered the Top 10 overall, driven by strength with Millennials (see Figure 9).

Figure 9 Women’s dress footwear – Top 10, by generation

	Total	Gen Z	Millennial	Gen X
1	Coach 100	Coach 100	Coach 100	Coach 100
2	Michael Kors 76	Steve Madden 83	Steve Madden 73	Michael Kors 96
3	Steve Madden 72	Kurt Geiger 76	Michael Kors/ Kate Spade 72	Kate Spade 83
4	Kate Spade 70	Calvin Klein/ Michael Kors 75	Vince 78	Vince 78
5	Calvin Klein 63	Calvin Klein 61	Sam Edelman 73	Sam Edelman 73
6	Kurt Geiger 59	Kate Spade 70	Kurt Geiger 53	Steve Madden 68
7	Polo Ralph Lauren 53	Polo Ralph Lauren 67	Vince 52	Kurt Geiger/ LK Bennett 66
8	Sam Edelman 50	GUESS/ Kenneth Cole/ Cole Haan 55	Dolce Vita/ Vince Camuto 51	Calvin Klein 65
9	Vince/ Dolce Vita 41		Polo Ralph Lauren 49	Polo Ralph Lauren 63
10				

Source: L.E.K. survey and analysis

Noteworthy moves – Men’s dress footwear

- Hugo Boss takes the top spot among men – though it doesn’t top any individual generation’s list, it has particular strength among Millennials and Gen X.
- Several brands promising to bring athletic-inspired innovation to the dress footwear category also make the Top 10, including Cole Haan, Wolf & Shepherd and Johnston & Murphy.
- Traditionally mall-based vertical retailers Steve Madden and ALDO perform better among younger generations, but Gen Z men show lack of engagement with the category overall (see Figure 10).

Figure 10 Men’s dress footwear – Top 10, by generation

	Total		Gen Z		Millennial		Gen X	
1	Hugo Boss	100	Steve Madden	100	Wolf & Shepherd	100	Nisolo	100
2	Kenneth Cole	97	Kenneth Cole	93	Hugo Boss	89	Hugo Boss	96
3	Cole Haan	92	Ferragamo	28	ALDO	83	Cole Haan	93
4	Ferragamo	88	Hugo Boss	16	Cole Haan	82	Kenneth Cole	91
5	Steve Madden	85	ALDO	14	Ferragamo	81	Beckett Simonon	81
6	ALDO	74	Stacy Adams	2	Tod’s	81	Stacy Adams	78
7	Stacy Adams	67	Cole Haan	0	Johnston & Murphy	79	Ferragamo	64
8	Wolf & Shepherd	59	N/A	N/A	Allen Edmonds	74	Rockport	55
9	Johnston & Murphy	53	N/A	N/A	Steve Madden	72	Jack Erwin	49
10	Allen Edmonds	51	N/A	N/A	Kenneth Cole	69	Joseph Abboud	47

Source: L.E.K. survey and analysis

Apparel

Competition is heating up in apparel, with this year's ranking revealing tighter clustering of brands at the top of each list (particularly among women) when compared to last year's results. Relative to footwear, apparel rankings show more material differences in top brands across genders (see Figures 11 and 12).

Women's apparel rankings continue to be shaped by athleisure, fast fashion and digitally native brands, with players such as SHEIN, SKIMS, Edikted and Alo Yoga featuring prominently across categories, though leadership differs by cohort. Men's apparel rankings, by contrast, skew more heavily toward workwear, heritage and technical brands, including Carhartt, Levi's, Nike and The North Face.

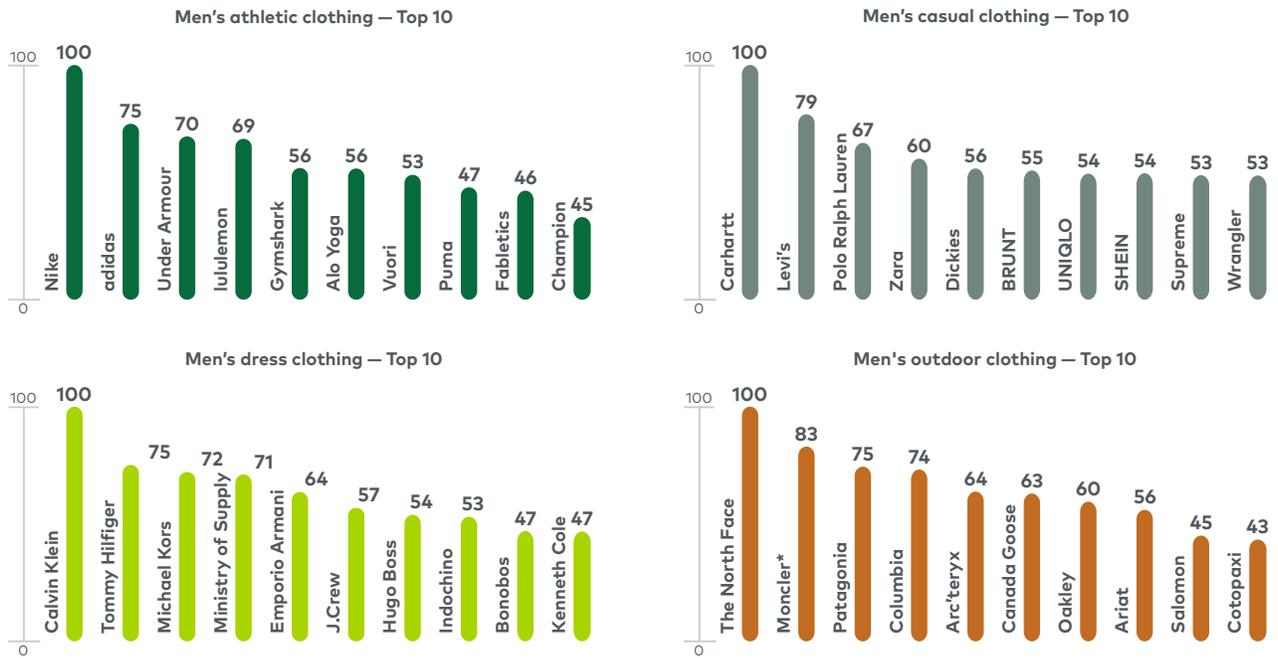
Figure 11 Women's clothing

Brands ranked on a scale of 1-100



*NR=not ranked in prior year survey
Source: L.E.K. survey and analysis

Figure 12 Men's clothing
Brands ranked on a scale of 1-100



*NR=not ranked in prior year survey
Source: L.E.K. survey and analysis

Athletic clothing

Key themes:

- The shake-up continues in athletic clothing, with emerging brands gaining relative to legacy athletic players. Though **Nike** remains No. 1 overall for both women and men, **Alo Yoga** has made material strides across both genders relative to a more stable **Nike** and **lululemon**.
- Men's rankings remain more legacy-heavy at the top (**Nike**, **adidas**, **Under Armour**), while Gen Z and women's rankings have strong emerging brand performance, signaling faster change among these cohorts.

Noteworthy moves – Women's athletic clothing

- Nike holds the top spot overall, but competition is tightening, with both Alo Yoga and lululemon nearly tying its overall score and surpassing the industry giant among Gen Z.
- TikTok-viral brand Halara debuts at No. 4 overall, with strong performance across generations. Fabletics is another rising brand coming in at No. 7 overall, with higher heat scores among Gen Z and Millennials relative to last year.

- Vuori dropped down the list (though it maintains differential strength among Gen X), while Girlfriend Collective and Champion fell out of the Top 10 entirely (see Figure 13).

Figure 13 Women’s athletic clothing – Top 10, by generation

	Total	Gen Z	Millennial	Gen X
1	Nike 100	lululemon 100	Nike 100	Nike 100
2	Alo Yoga/ 99	Alo Yoga 98	lululemon 98	Alo Yoga 91
3	lululemon	Nike 88	Alo Yoga 94	Under Armour 82
4	Halara 78	Gymshark 71	Halara 84	Vuori/ 81
5	adidas 72	Halara 68	Under Armour 78	lululemon
6	Under Armour 68	Fabletics 64	adidas 77	Halara/ 76
7	Fabletics 67	adidas 61	Champion/	adidas
8	Gymshark 65	Athleta 52	Fabletics/ 65	Fabletics/ 72
9	Athleta 61	Vuori 50	Gymshark	Athleta
10	Vuori 57	Under Armour 44	Athleta 63	Girlfriend Collective 70

Source: L.E.K. survey and analysis

Noteworthy moves – Men’s athletic clothing

- Men’s athletic clothing has historically been dominated by legacy players, with Nike, adidas and Under Armour again taking the top three spots.
- Notably, Alo Yoga has built on its strength with women to jump into the overall Top 10 and is the No. 2 brand for Gen Z men.
- Gymshark and Vuori are also showing increased heat, coming in at No. 5 and No. 7 overall with strong performance across generations.
- YoungLA, a Gymshark competitor with a streetwear-style drop model, entered the Top 10 for Gen Z, while running brand, Tracksmith, entered the Top 10 for Gen X (see Figure 14).

Figure 14 Men’s athletic clothing — Top 10, by generation

	Total	Gen Z	Millennial	Gen X
1	Nike 100	Nike 100	Nike 100	Nike 100
2	adidas 75	Alo Yoga 77	adidas 82	Under Armour 84
3	Under Armour 70	lululemon 76	lululemon 75	adidas 79
4	lululemon 69	adidas 72	Under Armour 73	lululemon/ 59
5	Gymshark/ 56	Under Armour 67	Gymshark 63	Vuori 56
6	Alo Yoga 56	Gymshark 61	Puma 60	Gymshark 56
7	Vuori 53	Vuori 56	Vuori 58	Puma 53
8	Puma 47	Champion 52	Fabletics/ 56	Tracksmith 51
9	Fabletics 46	YoungLA 51	Champion 56	Ten Thousand 49
10	Champion 45	Fabletics 50	Alo Yoga 55	Alo Yoga 47

Source: L.E.K. survey and analysis

Casual clothing

Key themes:

- Casual clothing splits sharply by gender: men’s top brands skew toward workwear and denim (**Carhartt, Levi’s, Wrangler**), while women’s is driven by fast fashion and influencer-led brands (**SHEIN, SKIMS, Edikted**).
- **Carhartt, Levi’s** and **SHEIN** show strength across genders, but the remainder of the Top 10 has limited overlap.
- Across all categories, casual clothing has the highest representation of “accessible” brands in the Top 10, as consumers prioritize brands that allow them to stay on-trend without excessive spending.

Noteworthy moves — Women’s casual clothing

- SHEIN, Carhartt and SKIMS remain the top three brands overall, though SHEIN is starting to lose its luster with Gen Z (slipping to No. 7 on the list).
- Edikted and Aritzia are top climbers, coming in at No. 4 and No. 5 overall, with differential strength among Gen Z.
- Leading “dupe” brand Quince debuts in the Top 10 this year, driven by high ratings from Gen X, while UNIQLO and Zara fall to just outside of the Top 10 (see Figure 15).

Figure 15 Women’s casual clothing – Top 10, by generation

	Total	Gen Z	Millennial	Gen X
1	SHEIN 100	Ediktet 100	SHEIN 100	SHEIN 100
2	Carhartt 97	SKIMS 90	Carhartt/ 86	PrettyLittleThing 98
3	SKIMS 93	Aritzia/ 81	SKIMS	Carhartt 96
4	Ediktet 89	Carhartt	Levi’s 79	Quince 89
5	Aritzia 77	True Religion 79	Free People/	Levi’s 78
6	Levi’s 74	Peppermayo/	Fashion Nova 71	Free People 75
7	Free People 73	SHEIN 72	Aritzia/	Princess Polly 71
8	PrettyLittleThing/	Juicy Couture 71	Zara 70	Old Navy/
9	Quince 68	Brandy Melville 64	Duluth Trading Company 59	SKIMS 70
10	Fashion Nova 64	Free People 62	Princess Polly 36	Fashion Nova 67

Source: L.E.K. survey and analysis

Noteworthy moves – Men’s casual clothing

- The men’s list is dominated by workwear and denim brands, with Carhartt holding the No. 1 spot and Levi’s, Dickies, BRUNT and Wrangler all making the Top 10.
- Polo Ralph Lauren strengthens into the top three overall, with particular growth among Gen Z, as the company continues to invest in elevating the brand among younger generations.
- Select notable differences appear across generations, with True Religion trending among Gen Z, BRUNT outperforming among Millennials, and Quince popping into the Top 10 for Gen X men (see Figure 16).

Figure 16 Men’s casual clothing – Top 10, by generation

	Total	Gen Z	Millennial	Gen X
1	Carhartt 100	Carhartt 100	Carhartt 100	Carhartt 100
2	Levi’s 79	True Religion 84	Levi’s 89	Levi’s 81
3	Polo Ralph Lauren 67	Polo Ralph Lauren 83	Polo Ralph Lauren 71	Supreme 67
4	Zara 60	Levi’s 75	BRUNT 70	Duluth Trading Company 64
5	Dickies 56	SHEIN/	Zara 69	UNIQLO 61
6	BRUNT 55	Zara 72	Supreme 68	UNTUCKit 60
7	UNIQLO/	Boohoo 67	Dickies 67	Quince/
8	SHEIN 54	H&M 64	Wrangler 62	The Frankie Shop 58
9	Supreme/	Wrangler/	Duluth Trading Company 60	Dickies 57
10	Wrangler 53	UNIQLO 62	UNIQLO 59	BRUNT 56

Source: L.E.K. survey and analysis

Outdoor clothing

Key themes:

- Outdoor clothing has higher heat scores overall and tighter clustering of competition relative to last year.
- Legacy industry leaders remain on top for the “mainstream” outdoor consumer — with **The North Face**, **Columbia** and **Patagonia** taking three of the top four spots for both women and men.
- Luxury outerwear brands are continuing to make inroads, particularly among women, with **Moncler**, **Canada Goose** and others showing up on Top 10 lists.
- **Arc'teryx** continues to climb for both women and men, building on its technical performance gear with fashion credibility.

Noteworthy moves — Women's outdoor clothing

- The North Face maintained its top positioning as No. 1 overall and across generations, but the real story is around luxury/premium outerwear, with Moncler, Mackage, Canada Goose and Moose Knuckles all making the women's Top 10 list.
- Arc'teryx is another noteworthy gainer, though it still performs more strongly with men than women, coming in at No. 9 overall and showing differential strength with Gen Z and Millennials.
- Cotopaxi rounds out the Top 10, bolstered by the No. 2 position among Gen X women.
- Performance-layering brands Icebreaker and Smartwool fell out of the Top 10 this year (see Figure 17).

Figure 17 Women’s outdoor clothing – Top 10, by generation

	Total		Gen Z		Millennial		Gen X	
1	The North Face	100	The North Face	97	The North Face	100	The North Face	100
2	Moncler	78	Canada Goose	87	Ariat	76	Cotopaxi/	89
3	Columbia	77	Ariat	82	Patagonia/	74	Canada Goose	
4	Patagonia/	75	Moncler	80	Columbia			Columbia/
5	Ariat			Arc'teryx	78	Moncler	73	Moncler
6	Mackage	74	Columbia	76	Arc'teryx	57	Patagonia	84
7	Canada Goose	70	Patagonia	72	Moose Knuckles	56	Ariat	66
8	Moose Knuckles	61	Moose Knuckles	69	Fjällräven	52	Moose Knuckles	65
9	Arc'teryx	60	Cotopaxi	58	Canada Goose	51	Mackage	62
10	Cotopaxi	54	Salomon	55	L.L.Bean	38	Helly Hansen	61

Source: L.E.K. survey and analysis

Noteworthy moves – Men’s outdoor clothing

- The North Face remains No. 1 overall, but Moncler follows relatively closely behind, driven by its No. 1 performance among Gen Z men.
- Arc'teryx strengthens into the top five overall – while last year’s performance was driven differentially by Gen Z, the brand’s heat has increased with Millennial and Gen X consumers this year.
- Similar to the women’s side, Cotopaxi comes in at No. 10 overall, with its strongest performance among Gen X.
- L.L.Bean, on the other hand, has fallen out of the Top 10 across generations (see Figure 18).

Figure 18 Men’s outdoor clothing – Top 10, by generation

	Total		Gen Z		Millennial		Gen X	
1	The North Face	100	Moncler	100	The North Face	100	The North Face	100
2	Moncler	83	The North Face	96	Moncler	84	Columbia	72
3	Patagonia	75	Columbia	78	Patagonia	80	Patagonia	68
4	Columbia	74	Oakley/	74	Arc'teryx	74	Cotopaxi	67
5	Arc'teryx	64	Patagonia			Columbia	73	Arc'teryx
6	Canada Goose	63	Canada Goose	71	Canada Goose	66	Fjällräven	59
7	Oakley	60	Ariat	60	Ariat	61	Moncler	57
8	Ariat	56	Arc'teryx	57	Oakley	60	Canada Goose/	54
9	Salomon	45	Outdoor Research	53	Salomon	59	Ariat	
10	Cotopaxi	43	Salt Life	51	Cotopaxi	50	Mackage	53

Source: L.E.K. survey and analysis

Dress clothing

Key themes:

- The hottest dress clothing brands show very limited overlap across men and women and increasing variance across generational cohorts within — women's leaders tend to be occasion-led brands, while men's top brands are more likely to be versatile "wear to work" options.
- While many of the top brands remain the same year over year, anchored by accessible designer brands (e.g., **Michael Kors, Calvin Klein**), there has been material churn lower in the list.
- Further, the top brands are often materially different by generation, suggesting that no brand has established the same broad consumer connectivity as seen in some other categories (e.g., athletic).

Noteworthy moves — Women's dress clothing

- Michael Kors remains the top overall brand, but its heat is softening with younger consumers relative to last year.
- Reformation moves up one spot to No. 3 overall, and outperforms Michael Kors among both Gen Z and Millennials.
- House of CB and Staud are new to the Top 10 list overall this year. House of CB, a British brand known for its corset silhouette, showed differentially strong performance among Gen Z, where it achieved the No. 1 spot.
- Gen Z, in particular, favors occasion-driven brands focused on dresses like House of CB, Lulus and Katie May, while Millennials and Gen X have office-appropriate contemporary brands like Veronica Beard and Theory among their Top 10 (see Figure 19).

Figure 19 Women’s dress clothing — Top 10, by generation

	Total		Gen Z		Millennial		Gen X	
1	Michael Kors	100	House of CB	100	Reformation	100	Michael Kors	100
2	Kate Spade	98	Kate Spade	74	Michael Kors	99	Kate Spade	85
3	Reformation	96	Reformation	74	Kate Spade	94	Saved by the Dress	76
4	House of CB	93	Calvin Klein	71	House of CB	93	LK Bennett	72
5	Calvin Klein	86	Michael Kors	66	Calvin Klein	83	Theory	72
6	Staud	78	LK Bennett	53	Lulus	79	Vince Camuto	69
7	Lulus	70	Lulus	52	Alice + Olivia	74	Reformation	66
8	Katie May	60	Cleobella	43	Theory	67	Calvin Klein	62
9	LK Bennett	59	Sherri Hill	43	Ted Baker	65	Petal & Pup	59
10	Theory	58	Katie May	43	Veronica Beard	59	ASTR the Label	58

Source: L.E.K. survey and analysis

Noteworthy moves — Men’s dress clothing

- The men’s dress clothing category is anchored in accessible designer brands — with Calvin Klein, Tommy Hilfiger and Michael Kors taking the top three spots overall (with Hugo Boss and others in the Top 10 as well).
- The remainder of the list is driven by digitally native players (Ministry of Supply, Indochino, Bonobos), many of which promise superior fit and performance — Ministry of Supply is one of the top gainers year over year, driven by strength among Millennials.
- Mall-based vertical retailers Brooks Brothers and Banana Republic have fallen off the list since last year, though J.Crew remains (see Figure 20).

Figure 20 Men’s dress clothing — Top 10, by generation

	Total		Gen Z		Millennial		Gen X	
1	Calvin Klein	100	Calvin Klein	100	Ministry of Supply	100	Zegna	100
2	Tommy Hilfiger	75	Tommy Hilfiger	81	Calvin Klein	88	Bonobos	96
3	Michael Kors	72	Michael Kors	59	Indochino	79	Calvin Klein	91
4	Ministry of Supply	71	Kenneth Cole/	51	Michael Kors	78	Emporio Armani	86
5	Emporio Armani	64	Hugo Boss		Tommy Hilfiger/	72	Reiss	85
6	J.Crew	57	Ted Baker	49	J.Crew		72	Suit Supply
7	Hugo Boss	54	J.Crew	47	Emporio Armani	71	Theory	79
8	Indochino	53	Emporio Armani	46	Hugo Boss	57	Michael Kors	75
9	Bonobos/	47	Banana Republic	42	Banana Republic	56	Hugo Boss	73
10	Kenneth Cole		Perry Ellis	41	Suit Supply	55	Ministry of Supply	71

Source: L.E.K. survey and analysis

Bags & luggage

Bags & luggage is a new category included in the Brand Heat Index for the first time in 2026. This category focuses primarily on travel bags and everyday carry styles that tend to be used across genders, including luggage, backpacks, duffels, totes and functional day bags – rather than fashion-led, luxury or leather goods products.

Key themes:

- In this inaugural edition, celebrity-founded **BÉIS** ranks No. 1 overall, and takes the second spot for each generation.
- However, brand leadership varies meaningfully by generation, with **BAGGU** topping the list for Gen Z, **TUMI** leading Millennials and **Dagne Dover** ranking No. 1 for Gen X.
- Digitally native brands (e.g., **BÉIS**, **Away**) show broad relevance across cohorts, while traditional premium luggage brands like **TUMI** and **Rimowa** perform most strongly among Millennials.
- Heat scores are generally lower among Gen Z, suggesting this is a category they may not be as invested in today (see Figure 21).

Figure 21 Bags & luggage – Top 10, by generation

	Total	Gen Z	Millennial	Gen X
1	BÉIS 100	BAGGU 100	TUMI 100	Dagne Dover 100
2	BAGGU 96	BÉIS 77	BÉIS 89	BÉIS 84
3	Away 80	Delsey 67	Away 80	Away 83
4	Rimowa 77	Longchamp 55	Monos 78	Peak Design 81
5	TUMI 70	Away 52	Rimowa 74	Fjällräven 75
6	Aer 68	Chrome Industries 51	Travelpro 70	Aer 72
7	Delsey 68	BOGG BAG 50	Samsonite 69	Rimowa 69
8	Longchamp 67	Samsonite 48	Aer 69	TUMI 68
9	Samsonite 67	Travelpro 48	Paravel 68	Lug 65
10	Peak Design 64	Briggs & Riley 48	BAGGU 67	MZ Wallace 65

Source: L.E.K. survey and analysis

Outdoor equipment & sporting goods

Outdoor equipment & sporting goods is another new category included in the Brand Heat Index for the first time in 2026. The category captures a broad range of equipment and gear associated with outdoor activities, such as camping and backpacking, cycling, fishing and boating, hunting, snow sports, and golf. Because the category spans multiple activities and use cases, the resulting rankings reflect a mix of sport-specific performance brands and broader outdoor recreation brands.

Key themes:

- Brand leadership varies meaningfully by generation, with **Stanley** ranking No. 1 overall and leading Gen Z, while **YETI** leads both Millennials and Gen X.
- Outdoor recreation and hydration brands show broad relevance across cohorts, with **YETI, Stanley, Hydro Flask** and **Coleman** appearing consistently across generational Top 10 lists – in particular, brands from this category dominate for Gen Z.
- Older cohorts, however, show more interest in activity-specific equipment brands. In particular, Millennials favor leading brands across golf (e.g., **Titleist, Callaway**), snow sports (e.g., **Oakley, Burton**) and cycling (e.g., **Shimano, DT Swiss**) (see Figure 22).

Figure 22 Outdoor equipment & sporting goods — Top 10, by generation

	Total	Gen Z	Millennial	Gen X
1	Stanley 100	Stanley 100	YETI 100	YETI 100
2	YETI/ 98	RTIC 82	Titleist 94	Scotty Cameron 97
3	TaylorMade 98	YETI 81	Stanley 93	Bushnell 96
4	L.A.B. Golf* 90	Coleman 68	TaylorMade 80	Stanley 84
5	Callaway 88	Hydro Flask 61	Callaway 74	Solo Stove 84
6	Scotty Cameron 84	Garmin 61	Oakley 72	Rapala 78
7	Titleist 74	Solo Stove 61	Shimano 68	TaylorMade 77
8	RTIC 69	REI Co-op 59	Burton 67	Titleist 76
9	Shimano 68	Osprey 53	DT Swiss 65	Coleman 72
10	Bushnell 67	CamelBak 52	Hydro Flask 64	Hydro Flask 69

*Included in overall rankings based on aggregate performance; excluded from generational cuts due to low sample sizes in Gen Z and Gen X
 Source: L.E.K. survey and analysis

Conclusion

Our Brand Heat Index continues to demonstrate how material differences in brand momentum can exist below the surface and how quickly sentiment can change. Once again, generational differences in top brand rankings point to the importance of recognizing that consumers are not all the same and that deep understanding and tailored strategies are required to win.

Further, the continued churn of brands among the Top 10 in key categories and the increasing competition from emerging brands to legacy leaders make this targeted consumer understanding critical.

We tested around 650 different brands across categories to understand their popularity and key drivers behind it. We invite you to connect with us to dive deeper into how consumers feel about your brand and gain actionable insights on how to drive greater brand heat.

Please don't hesitate to [contact us](#).

Endnotes

¹BusinessOfFashion.com, "Have Sneaker Sales Finally Peaked?" <https://www.businessoffashion.com/articles/sports/nike-adidas-footwear-industry-retail-sales-down/>

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2026
US FOOTWEAR, APPAREL,
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BRAND HEAT INDEX

