An In-depth Look at Footwear Retail YTD
The U.S. Footwear Industry Market Drivers
12 months ending Jun ‘15

Prepared for FDRA members

September 2015
Introduction

The NPD Group provides market information and advisory services to help our clients make better business decisions. We help companies develop and offer the right products and get them in the right places at the right prices for the right people in order to grow their businesses.

For more information, visit npd.com and npdgroupblog.com. Follow us on Twitter: @npdgroup.
Highlights

The total footwear market is estimated at $64B for the 12 months ending (ME) Jun’15 and grew +5% YOY. Footwear has benefited from consumers’ increased spending on health and wellness categories, driving the comfort and athletic markets.

- Women’s footwear represents the largest wearer segment, and generated an absolute dollar gain around +$1.3B. Men’s footwear also contributed over +$1B in incremental sales.

- Millennials drove industry dollar growth, particularly ages 25-34. This segment increased +37%. But still keep watch on 65+ consumers which increased +14%, generating over +$500MM in growth volume.

- Online footwear sales totaled $15 billion, up +13% in dollar sales. 23% of total footwear dollar sales are generated online.

- Performance footwear contributed the largest dollar volume growth of about +$2B. Outdoor footwear also increased at a similar pace (+10%), generating almost +$500MM in incremental sales as consumers gravitate towards styles that facilitate an active lifestyle (or make them feel/look like they have one).

- The South Region contributed dollar growth volume of about +$1.5B. The region increased +7%. Most of the growth came from South Atlantic region, which drove almost half of the South’s growth.

For more information, visit npd.com and npdgroupblog.com. Follow us on Twitter: @npdgroup.
The total footwear market is estimated at $64B for 12ME Jun’15, up +5% YOY.

- Women’s and men’s footwear both generated over +$1MM in incremental sales vs. LY. However, children’s footwear increased at the fastest rate of +8%.

- Online footwear sales continued to drive total market growth with an increase of +13%, or about +$1.7B in growth dollars. Online sales contributed over half the growth in total footwear.

Source: The NPD Group/Consumer Tracking Service
Footwear Market Sales Drivers 12ME Jun’15

Total Footwear by Category

- Performance footwear is the second largest category, and contributed the largest dollar volume growth of about +$2B. Although a much smaller category, outdoor footwear also increased at a similar pace generating almost +$500MM in incremental sales.

Total Footwear by Type

- Sneakers continued to increase (up +6%), driving almost 40% of footwear’s overall growth. Both boots and sandals increased +8% vs LY, together contributing nearly +$2B to total footwear sales.
Growth in the footwear market is being driven primarily by the older Millennial segment (ages 25-34), generating over +$1B in growth volume. 65+ consumers are also a notable driver, with a dollar increase of +14%.

Spending among $75-$100K households increased +15% generating the most incremental dollar sales of all the segments (+$1B).

$200K+ consumers’ footwear spend continued to rise and outpace the rest, with an increase of +36%.
Footwear Market Sales Drivers 12ME Jun’15

Total Footwear by Ethnicity

- Growth in the footwear market came from White consumers, who generated over +$1.6B in growth dollars. Hispanic consumers’ dollar sales growth outpaced the rest of the market, increasing +9%. This increase contributed about +$1.2B in incremental sales.

Total Footwear by Region

- The South Region generated the largest dollar growth volume of about +$1.5B. The region increased +7%. All sub-regions grew, but the greatest incremental sales came from the South Atlantic (+$700MM).

Source: The NPD Group/Consumer Tracking Service
Thank You

Keep up with what’s new at The NPD Group. Subscribe to our newsletter and other communications by visiting npd.com and clicking “Subscribe.”

Industries
- Automotive
- Beauty
- Consumer Electronics
- Entertainment
- Fashion
- Food / Foodservice
- Home
- Luxury
- Mobile
- Office Supplies
- Sports and Leisure Trends
- Technology
- Toys
- Video Games

Countries
- Australia
- Belgium
- Brazil
- Canada
- China
- France
- Germany
- India
- Italy
- Japan
- Mexico
- Netherlands
- New Zealand
- Poland
- Russia
- South Korea
- Spain
- Sweden
- Turkey
- United Kingdom
- United States