FDRA

FOOTWEAR DISTRIBUTORS AND RETAILERS OF AMERICA

2017 Spring Sales Survey

A nation-wide survey of footwear consumers on their purchasing habits for Spring 2017

This survey was commissioned by

FOOTWEAR DISTRIBUTORS AND RETAILERS OF AMERICA

The footwear industry's business and trade association

At over 80% of the entire industry, the Footwear Distributors Retailers of America (FDRA) is the largest and most respected footwear trade association in the U.S. It represents and serves the entire footwear industry from small family owned footwear businesses to global footwear companies as well as domestic manufactures, importers and retailers. In all, it supports more than 130 companies and over 200 brands designing, producing and selling great footwear to consumers all over the globe.

This survey was conducted by

EMERSON COLLEGE POLLING

The Emerson College Polling Society (ECPS) is a research center at Emerson College in Boston, Massachusetts whose focus is on economics, politics, sports, and entertainment public opinion. ECPS surveys and polls are internationally recognized and in 2016 Bloomberg News ranked ECPS as the most accurate collegiate pollster for the Presidential Primaries. ECPS is a charter member of the Transparency Initiative of the American Association of Public Opinion Research (AAPOR).

Questions about this survey should be directed to info@fdra.org

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Methodology

The Emerson College Polling Society, under the supervision of Professor Spencer Kimball is pleased to present Footwear Distributors and Retailers of America with the findings from a survey of US Consumers.

All respondents interviewed in this study were part of a fully representative sample using an area probabilistic sampling method of N= 600 (sample size). The margin of error for the sample is +/- 3.9% in 19 of 20 cases unless otherwise specified in the results section.

The poll is based on a random sample of adults, 18 years of age and older. The survey was administered using both landlines via IVR data collection (77%) and cellphones (23%) via online data collection using Survey Sampling International SSI and was conducted April 4-6, 2017.

The results presented in this report include univariate and bivariate analysis of the data. Frequency distributions for each item included on the questionnaire are shown in the tables. In all cases, cross-tabulation results are also shown. This type of bivariate analysis examines differences between sub-groups of the overall population.

In the cases where cross tabulation results are presented, a chi-square test, an independent t-test for means, or a Z-test for independent percentages is shown. A chi-square test is used in cases where comparisons are made for categorical variables. A t-test is used in cases where comparisons are made for measurement variables. A Z-test is used in cases where comparisons are made between independent population percentages.

The purpose of these statistical tests is to determine whether or not the observed difference between sub-groups in the sample is due to sampling error or whether it is due to a real difference in the population. When the results are statistically significant, it strongly suggests that the observed difference between sub-groups found in the sample is due to a real difference in the population, and not due to sampling error.

A chi-square significance level of.05 indicates significance at the 95 percent level. In other words, it is 95 percent likely that the results are due to a real difference between comparison groups. A chi-square significance level of .01 indicates significance at the 99 percent level. When a t-test or a Z-test is shown, lower- and upper-case letters indicate significance at the 90 and 95 percent levels respectively.

This survey uses statistical weighting procedures to account for deviations in the survey sample from known population characteristics, which helps correct for differential survey participation and random variation in samples. The overall adult sample is weighted to recent Census data using a sample balancing procedure to match the demographic makeup of the population by region, gender, age, education and race. Margins of sampling error for this survey are not adjusted for design effect.

Executive Summary

The Footwear Distributors & Retailers of America (FDRA) commissioned this ***2017 Spring Sales Survey*** to accurately ascertain the evolving behaviors and insights of the American footwear consumer this spring season. Respondents answered key questions focused on the likelihood of an upcoming shoe purchase, for whom those shoes shall be purchased, the types of footwear consumers are searching for, and the channel in which they will buy their shoes. The results support current industry notions with some definite surprises along the way.

Overall, 46% of respondents were very likely to purchase new shoes for either themselves or their family this spring season with another 22% saying they were somewhat likely and 32% saying they were not likely at all.

Among respondents purchasing shoes, 39% said they were buying comfort/casual sneakers/leisure shoes and 26% said they were purchasing performance sneakers for the gym or sports. Fourteen-percent (14%) said they were buying fashion/dress shoes like heels, flats, or men's oxfords while 11% were buying work boots/shoes and 6% were buying fashion boots. Four-percent (4%) said they were buying something else.

Comfort/Casual and Leisure shoes will be most popular in the Northeast (61%) and the Midwest (57%) and among Caucasians (43%), African Americans (54%) and Asians (41%). Sports performance shoes will be most popular in the South (36%) and among Hispanics (51%).

Thirty-one-percent (31%) of respondents plan on purchasing new shoes for Easter or Passover this year.

Shoppers prefer 3:1 purchasing new shoes in a physical store (77%) versus purchasing online (23%). Of those purchasing shoes this holiday season, 69% said they are going to a physical store and 31% said they are purchasing online.

Of those 23% shopping online, 47% plan to shop on Amazon, 16% plan to shop at the shoe brand's own website such as nike.com or stevemadden.com, 10% at a retailer's website like Nordstrom, Footlocker, or Target and 11% at footwear specific online sales site such as Zappos.com and Shoebuy.com. Seventeen-percent (17%) said they go somewhere else.

Of the 77% who plan on shopping in a store this Spring, 44% plan to go to a local chain store like DSW or outlet stores and 17% to a local family owned shoe store. Fifteen-percent (15%) plan to shop at a big box retailer like Target or Walmart and 13% said a department store like Sears. Eleven-percent (11%) said somewhere else.

Overall, 53% of consumer are going to stores for their shoe research/or see shoes they are going to buy. Fourteen-percent (14%) are going to retailer websites while 6% are looking in magazines, 5% in newspapers, 3% rely on social media and 3% rely on friends and family. Sixteen-percent (16%) said they use other sources than the ones provided.

Overall the most important factor when purchasing shoes this spring season is to fill a need at 37% and the cost at 30%. Adding variety was at 10% and keeping up with trends landed 5%. Nineteen-percent (19%) said there was some other reason for the new footwear.

Consumers find ensuring the proper fit as what they like most about in-store shopping at 41%, followed by customer service/help with finding and trying on shoes at 32% and convenience/location at 22%. Seeing new trends came in fourth at 5%.

Forty-eight-percent (48%) of consumers said they don't buy shoes online. For those who do purchase online, 21% said what they like most is the price and 18% said the variety. Twelve-percent (12%) said it was for convenience and 1% said to view the latest trends.

The biggest concern about buying shoes online is the shoes won't fit properly at 66%, Shipping issues came in a distant second at 9%, followed by 6% who were concerned shoes will look different in person than online and 5% who said their main concern was privacy and/or cyber security issues. 15% said there was another reason they don't purchase online.

Half of all consumers plan on spending less money this spring compared to last spring (52% to 14%) with 35% saying they will spend the same amount.

Overall 69% plan to spend under $100, with 23% budgeting between $100-$250, 7% said they will spend $250-$500 and 1% plan to spend over $500.

Results

1. How likely are you to purchase new shoes for either yourself or your family this Spring season?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Likely	277	46.1	46.1	46.1
	Somewhat Likely	134	22.3	22.3	68.4
	Not Likely	190	31.6	31.6	100.0
	Total	600	100.0	100.0	

2. What type of shoes are you most likely to purchase this Spring season? (MOE +/-4.8%)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Sports Performance	107	17.8	26.1	26.1
	Comfort/Casual Sneaker/Leisure	161	26.8	39.2	65.3
	Fashion Dress	55	9.2	13.5	78.8
	Fashion Boots	25	4.2	6.2	85.0
	Work Boots	44	7.3	10.7	95.7
	Something Else	18	3.0	4.3	100.0
	Total	410	68.4	100.0	
Missing	System	190	31.6		
Total		600	100.0		

3. Will you be purchasing new shoes for either yourself or your family for Easter or Passover this year? (MOE +/-4.8%)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	185	30.8	45.0	45.0
	No	226	37.7	55.0	100.0
	Total	410	68.4	100.0	
Missing	System	190	31.6		
Total		600	100.0		

4. Do you plan on purchasing your new shoes online or in a physical store? (MOE +/-4.8%)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Online	93	15.4	22.6	22.6
	Store	318	53.0	77.4	100.0
	Total	410	68.4	100.0	
Missing	System	190	31.6		
Total		600	100.0		

5. Where do you plan to shop for shoes online? (MOE +/-10.1%)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Amazon	43	7.2	46.7	46.7
	Shoe Brand Site	15	2.5	16.1	62.8
	Retailers website	9	1.5	9.5	72.3
	Online Sale sites	10	1.7	11.1	83.4
	Somewhere else	15	2.6	16.6	100.0
	Total	93	15.4	100.0	
Missing	System	507	84.6		
Total		600	100.0		

6. Which type of in-store location do you plan to shop for shoes? (MOE +/-5.5%)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	local family owned	55	9.2	17.4	17.4
	local chain	138	23.0	43.5	60.9
	Big Box	48	8.0	15.1	76.0
	Department	41	6.9	13.0	89.0
	Somewhere else	35	5.8	11.0	100.0
	Total	318	53.0	100.0	
Missing	System	282	47.0		
Total		600	100.0		

7. Where do you browse/conduct most of your research/or see shoes you are going to buy?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	In stores when shopping	317	52.8	52.8	52.8
	Magazines	36	6.1	6.1	58.9
	Retailer Websites	82	13.6	13.6	72.6
	Circular/newspaper	32	5.3	5.3	77.9
	Social Media	16	2.7	2.7	80.5
	rely on friends and family	19	3.2	3.2	83.7
	Other	98	16.3	16.3	100.0
	Total	600	100.0	100.0	

8. What is the most important factor when purchasing shoes this spring season?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Cost	178	29.6	29.6	29.6
	Need	219	36.6	36.6	66.2
	Adding variety to current styles	63	10.4	10.4	76.6
	Keeping up with Trends	28	4.7	4.7	81.3
	Something else	112	18.7	18.7	100.0
	Total	600	100.0	100.0	

9. When you buy shoes in stores, what do you like most about the in-store shopping experience?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Customer Service	193	32.1	32.1	32.1
	Convenience	131	21.8	21.8	53.9
	seeing new trends	30	5.0	5.0	58.9
	ensuring proper fit	247	41.1	41.1	100.0
	Total	600	100.0	100.0	

10. When you buy shoes online, what do you most like about shopping online versus buying in-store?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Price	127	21.1	21.1	21.1
	More choices	105	17.5	17.5	38.6
	Convenience	70	11.7	11.7	50.3
	seeing new trends	7	1.2	1.2	51.6
	do not buy online ever	291	48.4	48.4	100.0
	Total	600	100.0	100.0	

11. What is your biggest concern about buying shoes online?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	won't fit	395	65.8	65.8	65.8
	look different	34	5.6	5.6	71.4
	shipping issues	52	8.7	8.7	80.1
	privacy/cyber security	31	5.1	5.1	85.2
	Other	89	14.8	14.8	100.0
	Total	600	100.0	100.0	

12. Do you plan on spending more or less money this Spring compared to last Spring on shoes for yourself and your family?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Spend more	81	13.5	13.5	13.5
	Spend less	309	51.5	51.5	65.0
	Spend the same	210	35.0	35.0	100.0
	Total	600	100.0	100.0	

13. What is the total amount of money you plan on spending on footwear this spring season for yourself and your family?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	<$100	415	69.1	69.1	69.1
	$100-$250	135	22.5	22.5	91.7
	$250-$500	42	6.9	6.9	98.6
	>$500	9	1.4	1.4	100.0
	Total	600	100.0	100.0	

14. What is your gender?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Male	295	49.2	49.2	49.2
	Female	305	50.8	50.8	100.0
	Total	600	100.0	100.0	

15. What is your age category?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	18-29	62	10.3	10.3	10.3
	30-39	117	19.5	19.5	29.8
	40-49	121	20.1	20.1	49.9
	50-59	122	20.4	20.4	70.3
	60-69	94	15.6	15.6	85.9
	70+	85	14.1	14.1	100.0
	Total	600	100.0	100.0	

16. What is your educational level?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	<HS	80	13.3	13.3	13.3
	HS	167	27.8	27.8	41.1
	Some College	127	21.1	21.1	62.2
	College Degree	160	26.6	26.6	88.8
	Post Grad +	67	11.2	11.2	100.0
	Total	600	100.0	100.0	

17. For statistical purposes only, will you tell me your ethnic background or ancestry?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Caucasian	374	62.3	62.3	62.3
	African American	74	12.3	12.3	74.6
	American Indian	4	.7	.7	75.3
	Asian	31	5.1	5.1	80.4
	Native Hawaiian	1	.2	.2	80.6
	Hispanic	103	17.1	17.1	97.7
	2+	13	2.2	2.2	99.9
	Unsure	1	.1	.1	100.0
	Total	600	100.0	100.0	

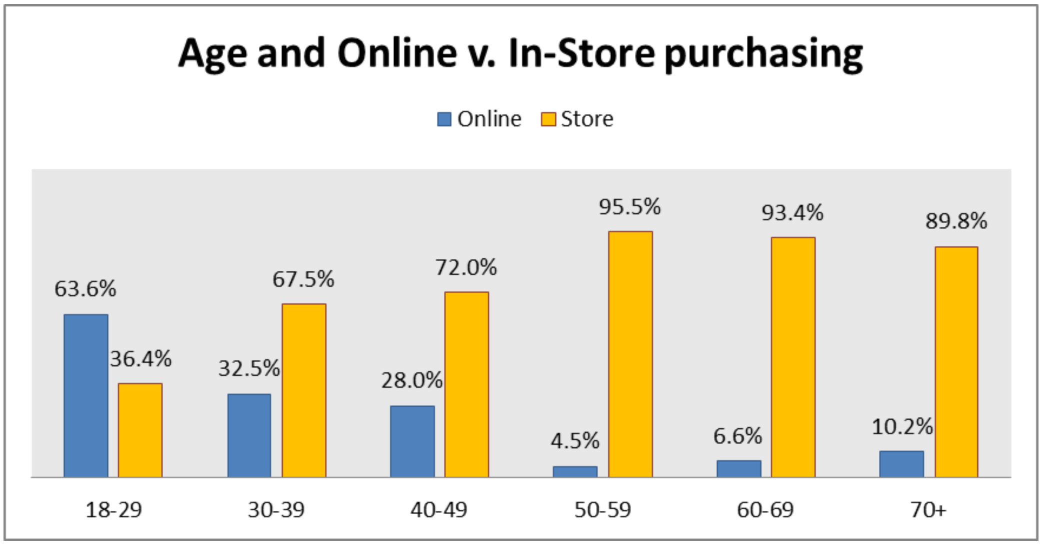
18. Region

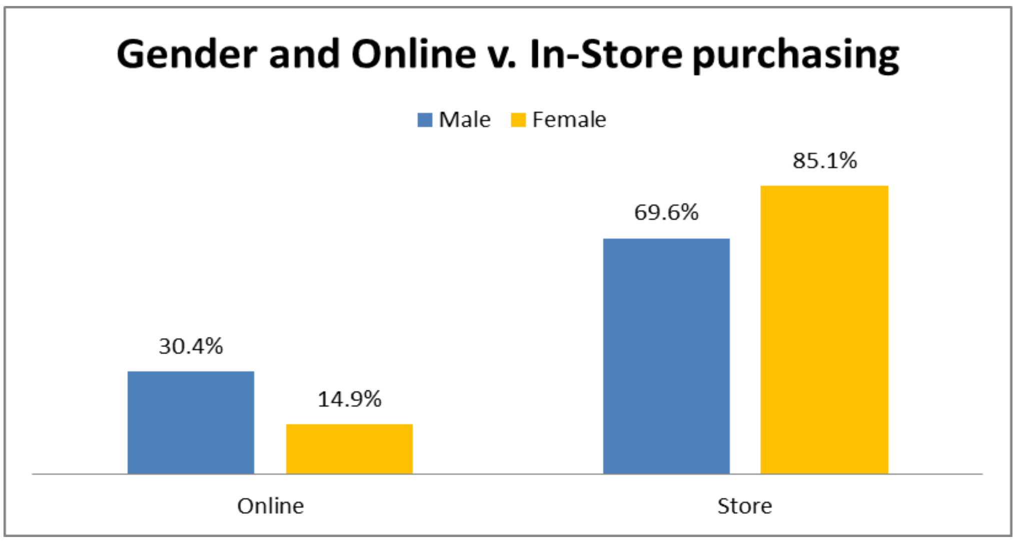
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Northeast	106	17.7	17.7	17.7
	South	225	37.5	37.5	55.2
	Midwest	128	21.3	21.3	76.5
	West	141	23.5	23.5	100.0
	Total	600	100.0	100.0	

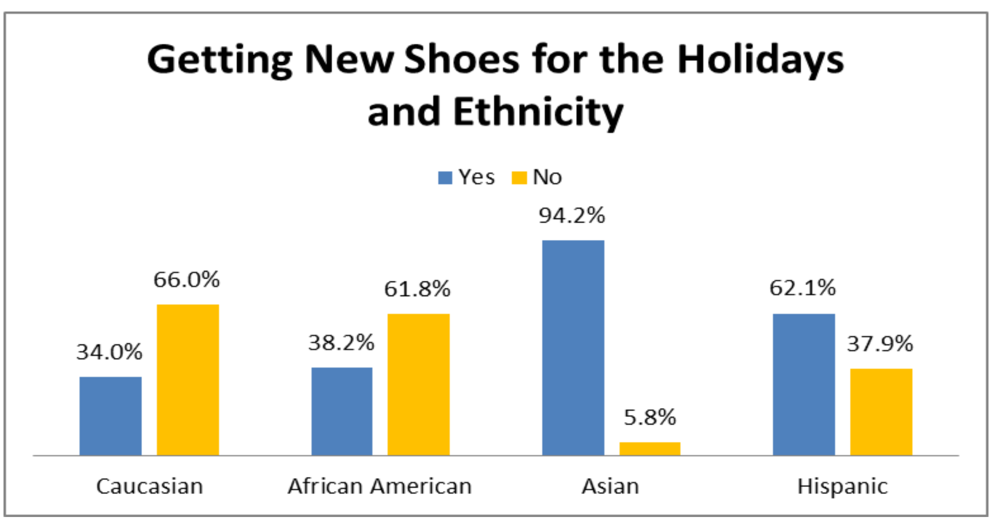
19. Mode

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Cell	136	22.6	22.6	22.6
	Landline	464	77.4	77.4	100.0
	Total	600	100.0	100.0	

Key Cross Tabs







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