FOOTWEAR DISTRIBUTORS AND RETAILERS OF AMERICA

# Spring 2018 National Shoe Sales Survey

*A nation-wide survey of footwear consumers on their purchasing habits for Spring 2018*

*This survey was commissioned by*

FDRA

FOOTWEAR DISTRIBUTORS AND RETAILERS OF AMERICA

## *The footwear industry's business and trade association*

At over 80% of the entire industry, the Footwear Distributors and 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 200 companies and over 400 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. Over the last year, ECPS surveys and polls outperformed CNN, Fox News, WSJ, and PPP in terms of overall accuracy. 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**

**Any portion of this survey used for any purpose without written consent of FDRA is strictly prohibited.**

## Contents



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## Methodology

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

All respondents interviewed in this study were part of a fully representative sample using an area probabilistic sampling method of N= 755 (sample size). The margin of error for the sample is +/- 3.5% 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 (50%) and cellphones (50%) via online data collection using Survey Sampling International SSI and was conducted April 18-22, 2018.

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

**Overall, 74% of respondents were very likely or somewhat likely to purchase new shoes for either themselves or their family this Spring season.** Once the non-buyers were removed from the survey, 69% said they were very likely to buy shoes with another 32% saying they were somewhat likely.

**Among respondents purchasing shoes, 70% said they were buying casual or performance sneakers.** Seventeen-percent (17%) said they were buying fashion/dress shoes like heels, flats, or men's oxfords, while 13% said they were buying something else.

**Shoppers are increasingly buying their shoes online but still prefer purchasing in a store at nearly 2:1. In 2017, 77% reported planning to purchase new shoes in a physical store (77%) versus purchasing online (23%). In 2018, 66% reported planning to purchase in a physical store while 35% said they plan to purchase online.**

**Of the 35% shopping online, there was a slight uptick in those planning to shop on Amazon from 47% in 2017 to 52% in 2018.** There was a slight downtick with those who plan to shop at the shoe brand's own website like NIKE or Steve Madden from 16% last year to 15%. Shoppers who frequent retailer websites like Nordstrom, Foot Locker, or Target held at 10% and 15% at footwear specific online sales site such as Zappos and Shoes.com, a bounce of 4 percentage points from 11% in 2017. There was a 10 point drop from seventeen-percent (17%) who said they go somewhere else in 2017 to 7% in 2018.

Online shoppers were asked about the usefulness of banner ads on websites or on google searches. Overall, 46% said they have little influence on their purchase and another 26% said they don't consider them helpful or even click on them. However, 1 in 10 online shoppers said they do influence what shoes they buy and 18% said it influenced where they purchased shoes.

Of the 66% who plan on shopping in a store this Spring, 53% plan to go to a local chain store like DSW or outlet stores which is up from 44% in 2017. An area of concern is for local family-owned shoe stores which saw a drop from 17% of shoppers utilizing them in 2017 to 4% in 2018.

Eighteen-percent (18%) plan to shop at a big box retailer like Target or Walmart, which is up from 15% last year and 15% said a department store like Sears which is up from 13% last year. Eight-percent (8%) said somewhere else.

**The most influential source of information about a retailer and their product offering is word of mouth from family and friends for 33% of respondents.** Paper ads in the mail was at 11%, TV and Radio ads were at 10%, google ads (pop ups) at 9%, emails from retailers at 7%, Facebook ads 6% and Instagram had 4%. Twenty-percent (20%) said something else.

**Overall the most important factors when purchasing shoes this spring season was a tie between the need (39%) and the cost (39%).** In 2017 the need (37%) was slightly more important than the cost (30%). Adding variety was at 11% and keeping up with trends landed at 5%, which were almost identical to last year's numbers regarding variety and trends. Only 6% said there was some other reason for the purchase of new footwear compared to 19% in 2017.

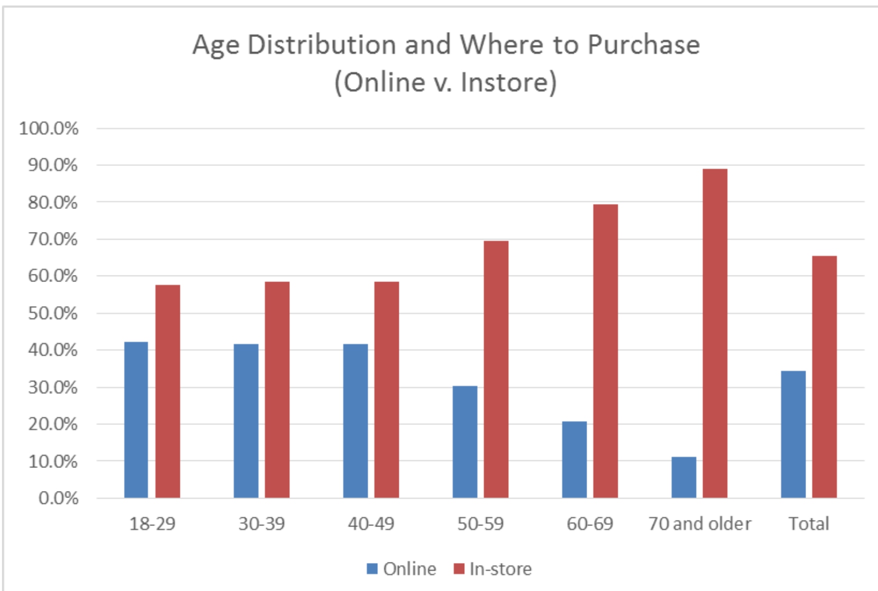
Consumers continue to find ensuring proper fit as what they like most about in-store shopping at 50% up from 41% in 2017, followed by customer service/help with finding and trying on shoes at 22% (down from 32%) and convenience/location stayed constant at 20% (was at 22% last year). Seeing new trends came in fourth at 7%, similar to last year which was at 5%.

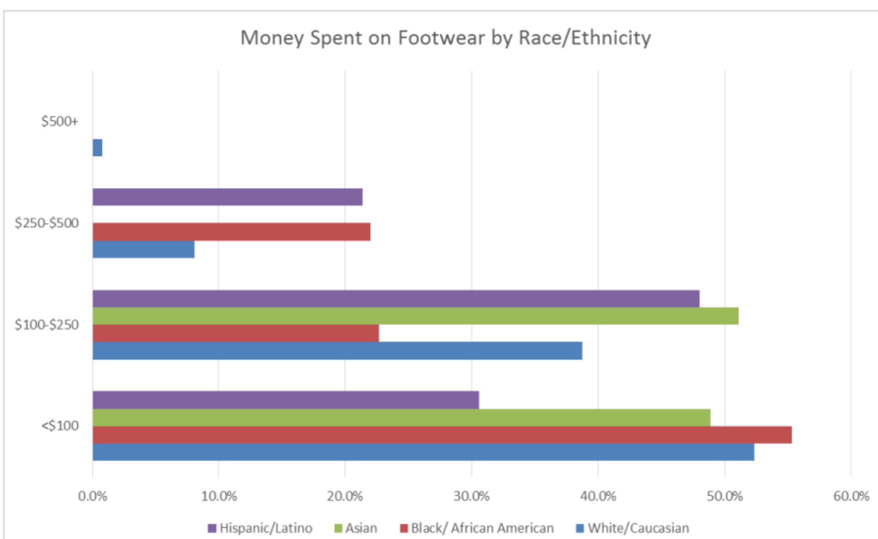
About 1 in 4 consumers (24%) who plan to purchase shoes this season reported they don't buy shoes online. For those who do purchase online, 25% said what they like most is the price (up from 21% in 2017) and 18% said the variety. Thirteen-percent (13%) said it was for convenience and 3% said to view the latest trends (all similar to 2017 results).

**The main benefit consumers are seeking from signing up for a rewards program are the discounts/coupons for 69% of responds.** Fifteen-percent (15%) said it was most important to know when sales are taking place while 10% wanted to know when the latest shoes were coming out and 7% said access to early sales and exclusive offers.

Nearly half of shoe purchasers are planning on spending the same amount as last year while 29% plan to spend less and 22% said they plan to spend more. This is a significant difference from 2017 when half of all consumers planned on spending less money (52%) and 14% planned on spending more.

**In 2018, 48% of consumers planned to spend under $100, this is a 21 percentage point drop from 2017 when 69% said they planned to spend under $100.** Growth in spending was with the $100-$250 amount which saw an increase from 23% in 2017 to 39% in 2018. Thirteen-percent (13%) said they will spend $250-$500 up from 7%, and about 1% plan to spend over $500.



## Results

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

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | Very likely | 517 | 68.5 | 68.5 | 68.5 |
| | Somewhat likely | 238 | 31.5 | 31.5 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

**What type of shoes are you most likely to purchase this Spring season?**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | Performance or casual Sneakers | 526 | 69.7 | 69.7 | 69.7 |
| | Leather fashion focused shoes like flat, wedges or heels or men's leather oxfords | 131 | 17.3 | 17.3 | 87.1 |
| | Some other type of footwear | 97 | 12.9 | 12.9 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

**Do you plan on purchasing your new shoes online or in a physical store?**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | Online | 261 | 34.5 | 34.5 | 34.5 |
| | In Store | 494 | 65.5 | 65.5 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

**Where do you plan to shop for shoes online?**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | Amazon | 135 | 17.9 | 51.7 | 51.7 |
| | The shoe Brand’s own website like NIKE or Steve Madden | 39 | 5.2 | 15.1 | 66.8 |
| | A Retailers website like Nordstrom, Footlocker, or Target | 27 | 3.6 | 10.4 | 77.2 |
| | Footwear specific online sales site such as Zappos Shoebuy.com | 40 | 5.3 | 15.4 | 92.6 |
| | Somewhere else | 19 | 2.6 | 7.4 | 100.0 |
| | Total | 261 | 34.5 | 100.0 | |
| Missing | System | 494 | 65.5 | | |
| Total | | 755 | 100.0 | | |

**We want to know about the usefulness of banner ads on websites or ads at the top of google searches that help you shop for shoes. Do these ads influence what shoes you buy or from where you buy them?**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | They influence what shoes you buy | 25 | 3.3 | 9.5 | 9.5 |
| | They influence where you purchase your shoes from | 46 | 6.1 | 17.8 | 27.2 |
| | They have little influence on your purchase | 121 | 16.0 | 46.3 | 73.6 |
| | You don't consider them helpful or click on them. | 69 | 9.1 | 26.4 | 100.0 |
| | Total | 261 | 34.5 | 100.0 | |
| Missing | System | 494 | 65.5 | | |
| Total | | 755 | 100.0 | | |

**Which type of in-store location do you plan to shop for shoes?**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | Local family owned shoe store | 22 | 2.9 | 4.4 | 4.4 |
| | Local chain store like DSW or Outlet stores | 263 | 34.8 | 53.1 | 57.6 |
| | A big box retailer like Target or Walmart | 93 | 12.4 | 18.9 | 76.4 |
| | Department store like Sears | 75 | 9.9 | 15.1 | 91.6 |
| | Somewhere else | 42 | 5.5 | 8.4 | 100.0 |
| | Total | 494 | 65.5 | 100.0 | |
| Missing | System | 261 | 34.5 | | |
| Total | | 755 | 100.0 | | |

**What is the primary source of information about a retailer and their product offerings that makes you shop in their store or on their website?**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | Ads pops up in google search | 64 | 8.5 | 8.5 | 8.5 |
| | TV or radio ads | 73 | 9.7 | 9.7 | 18.2 |
| | Facebook Ads | 44 | 5.9 | 5.9 | 24.1 |
| | Instagram Ads | 33 | 4.4 | 4.4 | 28.5 |
| | Word of mouth from friends or family | 252 | 33.3 | 33.3 | 61.8 |
| | Paper ads in the mail | 80 | 10.6 | 10.6 | 72.4 |
| | Emails from retailers | 56 | 7.4 | 7.4 | 79.7 |
| | Something else | 153 | 20.3 | 20.3 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

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

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | Cost | 291 | 38.6 | 38.6 | 38.6 |
| | Need | 297 | 39.3 | 39.3 | 78.0 |
| | Adding variety to your current shoe styles | 83 | 11.0 | 11.0 | 89.0 |
| | Keep up with trends | 40 | 5.3 | 5.3 | 94.3 |
| | Something else | 43 | 5.7 | 5.7 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

**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/help with finding and trying on shoes | 167 | 22.2 | 22.2 | 22.2 |
| | Convenience/location | 149 | 19.8 | 19.8 | 41.9 |
| | Seeing new trends | 50 | 6.6 | 6.6 | 48.5 |
| | Ensuring proper fit and comfort | 374 | 49.6 | 49.6 | 98.1 |
| | You do not buy shoes in a physical store ever | 14 | 1.9 | 1.9 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

**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 | 188 | 24.9 | 24.9 | 24.9 |
| | More choices | 272 | 36.0 | 36.0 | 60.9 |
| | Convince | 95 | 12.6 | 12.6 | 73.6 |
| | Seeing new trends | 19 | 2.5 | 2.5 | 76.0 |
| | You do not buy shoes online | 181 | 24.0 | 24.0 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

**If you sign up for a rewards program, what is the main benefit you are seeking?**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | Knowing when the latest shoes are out | 75 | 9.9 | 9.9 | 9.9 |
| | Knowing when new sales are taking place | 110 | 14.5 | 14.5 | 24.4 |
| | Discounts or coupons | 519 | 68.8 | 68.8 | 93.2 |
| | Access to early sales and/or exclusive offers | 51 | 6.8 | 6.8 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

**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 | You plan to spend more money | 166 | 22.1 | 22.1 | 22.1 |
| | You plan to spend Less money | 219 | 29.0 | 29.0 | 51.0 |
| | You plan to spend the same amount | 370 | 49.0 | 49.0 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

**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 | Less than $100 | 363 | 48.1 | 48.1 | 48.1 |
| | $100-$250 | 292 | 38.7 | 38.7 | 86.8 |
| | $250-$500 | 95 | 12.6 | 12.6 | 99.4 |
| | $500 or more | 3 | .5 | .5 | 99.9 |
| | Refused | 1 | .1 | .1 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

**What is your gender?**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | Male | 380 | 50.3 | 50.3 | 50.3 |
| | Female | 375 | 49.7 | 49.7 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

**What is your age category?**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | 18-29 | 169 | 22.4 | 22.4 | 22.4 |
| | 30-39 | 155 | 20.6 | 20.6 | 43.0 |
| | 40-49 | 126 | 16.7 | 16.7 | 59.7 |
| | 50-59 | 153 | 20.2 | 20.2 | 79.9 |
| | 60-69 | 90 | 12.0 | 12.0 | 91.9 |
| | 70 and older | 61 | 8.1 | 8.1 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

**What is your educational level?**

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | High school or less | 248 | 32.9 | 32.9 | 32.9 |
| | Some college | 180 | 23.9 | 23.9 | 56.8 |
| | College degree | 233 | 30.9 | 30.9 | 87.7 |
| | Graduate degree or higher | 93 | 12.3 | 12.3 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

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

| | | Frequency | Percent | Valid Percent | Cumulative Percent |
|---|---|---|---|---|---|
| Valid | White/Caucasian | 434 | 57.5 | 57.5 | 57.5 |
| | Black/ African American | 105 | 14.0 | 14.0 | 71.5 |
| | American Indian/Alaska Native | 6 | .9 | .9 | 72.4 |
| | Asian | 42 | 5.6 | 5.6 | 78.0 |
| | Native Hawaiian or Pacific Islander | 4 | .5 | .5 | 78.4 |
| | Hispanic/Latino | 151 | 20.0 | 20.0 | 98.4 |
| | Other | 12 | 1.6 | 1.6 | 100.0 |
| | Total | 755 | 100.0 | 100.0 | |

FDRA

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