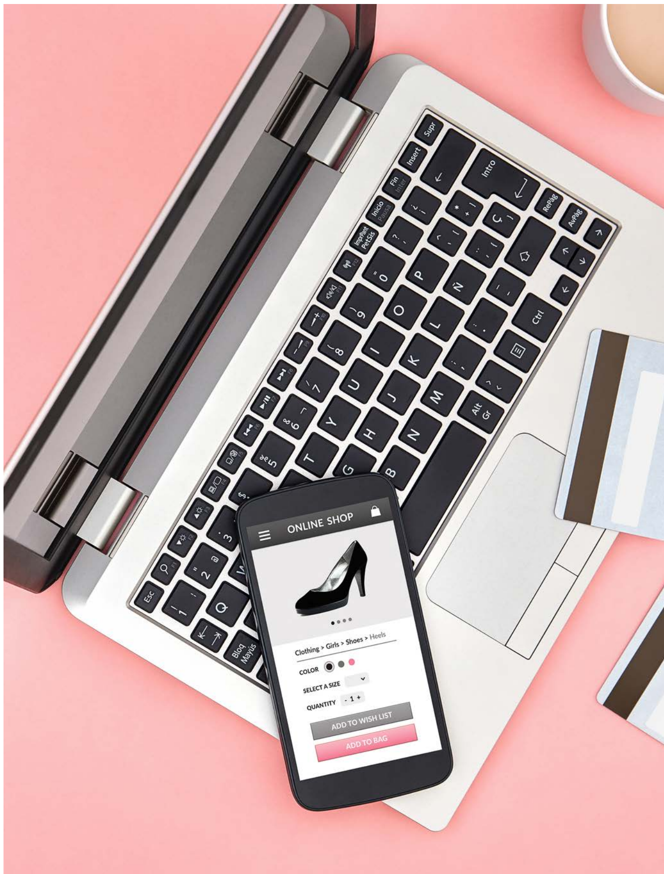
SPRING 2021 FOOTWEAR BUYING TRENDS

US National Public Opinion Survey of Spring Footwear Shoppers



FDRA
FOOTWEAR DISTRIBUTORS AND RETAILERS OF AMERICA

This survey was commissioned by

FDRA

FOOTWEAR DISTRIBUTORS AND RETAILERS OF AMERICA

The footwear industry's business and trade association

At over 95% 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 250 companies and over 500 brands designing, producing, and selling great footwear to consumers all over the globe.

This survey was conducted by

Emerson College

POLLING

Emerson Polling is based in Boston, Massachusetts. Emerson Polling is a charter member of the Transparency Initiative of the American Association of Public Opinion Research (AAPOR).

Contents

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METHODOLOGY

Emerson College Polling, under the supervision of Assistant Professor Spencer Kimball, is pleased to present the Footwear Distributors and Retailers of America with the findings from a survey of likely spring-season footwear shoppers. All respondents interviewed in this study were part of a fully representative sample using an area probabilistic sampling method of N=1,002 (sample size), with n=785 likely footwear shoppers. The margin of error for the sample is +/- 3.0 % in 19 of 20 cases for the general population, and +/- 3.4 % in 19 of 20 cases for footwear shoppers.

The survey was administered by contacting landline telephones via IVR, and online via a panel provided by Amazon MTurk, and was conducted between March 22–23, 2021.

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.

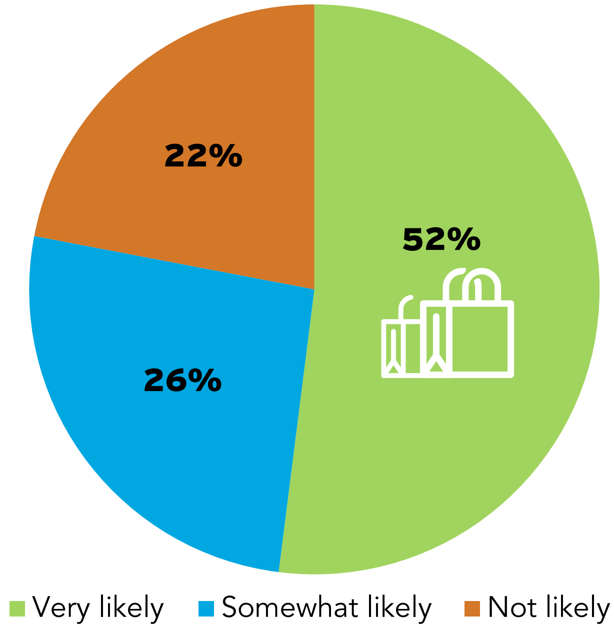
The purpose of these statistical tests is to determine whether or not the observed difference between sub-groups in the sample is due to sampling error or whether it is due to a real difference in the population. When the results are statistically significant, it strongly suggests that the observed difference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

SURVEY QUESTIONS AND RESULTS

How likely are you to purchase new shoes for either yourself or your family this Spring season? *(National, March 22-23, 2021, MM, N=1,002, +/- 3%)*

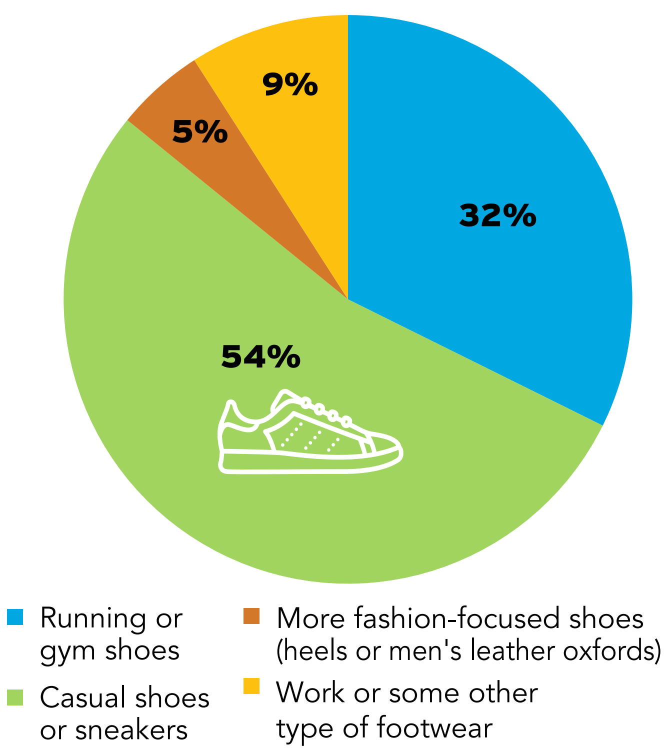
A majority (52%) of respondents report being very likely to purchase new shoes this Spring. Twenty-six percent (26%) of respondents said they were somewhat likely to buy shoes this Spring, and 22% reported that they are not likely to be purchasing new shoes this Spring.



- Younger respondents are more likely to be in the market for shoes, as 68% of those aged 18–29 and 61% of those aged 30–39 report being very likely to purchase, compared to 50% of those 40–49, 48% of those 50–59, and 42% of those 60–69 who are very likely to purchase. Among those 70 and older, a plurality (43%) are not likely to purchase shoes.
- Among Hispanics, 89% reported that they are very likely to purchase shoes this Spring, with another 6% indicating they are somewhat likely.
- Sixty-two percent of African-American respondents reported very likely to purchase shoes this Spring, with another 27% being somewhat likely.
- A majority (51%) of White respondents reported being very likely to purchase shoes this Spring, with another 27% saying they are somewhat likely.
- Among those in the Northeast and South, 81% are either very or somewhat likely to purchase, compared to 75% of those in the Midwest and West.

What type of shoes are you most likely to purchase this Spring season? *(National, March 22-23, 2021, Likely Shoe Buyers, MM, N=785, +/- 3.4%)*

Casual shoes/sneakers rank as the most popular shoe choice this Spring, among 53% of likely shoe buyers. Running or gym shoes were the next most popular choice with 32%, followed by work shoes or other footwear with 9%, and fashion-focused shoes with 5%.

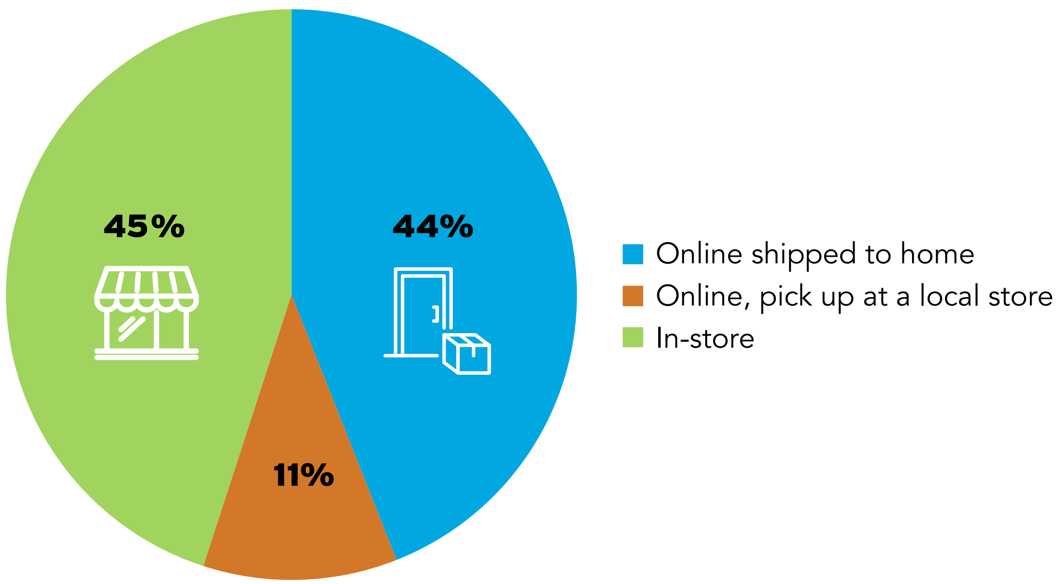


- Running or gym shoes are the most popular choice for those 18–29 (49%) while those 30–39 are split between running or gym shoes (43%) and casual shoes/sneakers (47%). Majorities in every other age category of shoe buyers plan to purchase casual shoes or sneakers.
- A majority (53%) of Hispanic shoe buyers plan to purchase running or gym shoes, while 40% are purchasing running shoes or sneakers, 6% are purchasing fashion-focused shoes, and 2% are purchasing work or other footwear.
- A plurality (48%) of Black/African-American shoe buyers are purchasing casual shoes or sneakers, while 27% plan to purchase running or gym shoes. Black/African-American shoe shoppers are also more likely to purchase work or other footwear (14%) and more fashion-focused footwear (11%).

This spring, do you plan on purchasing your new shoes online and shipped to your home, purchasing online for local in-store or curbside pickup, or will you shop inside and purchase shoes in a physical store? *(National, March 22-23, 2021, Likely Shoe Buyers, MM, N=785, +/- 3.4%)*

Shoppers are split on where they plan to do their footwear purchasing this spring, with 45% planning on shopping in-store, 44% buying online shipped to their home, and 11% buying online for in-store or curbside pickup.

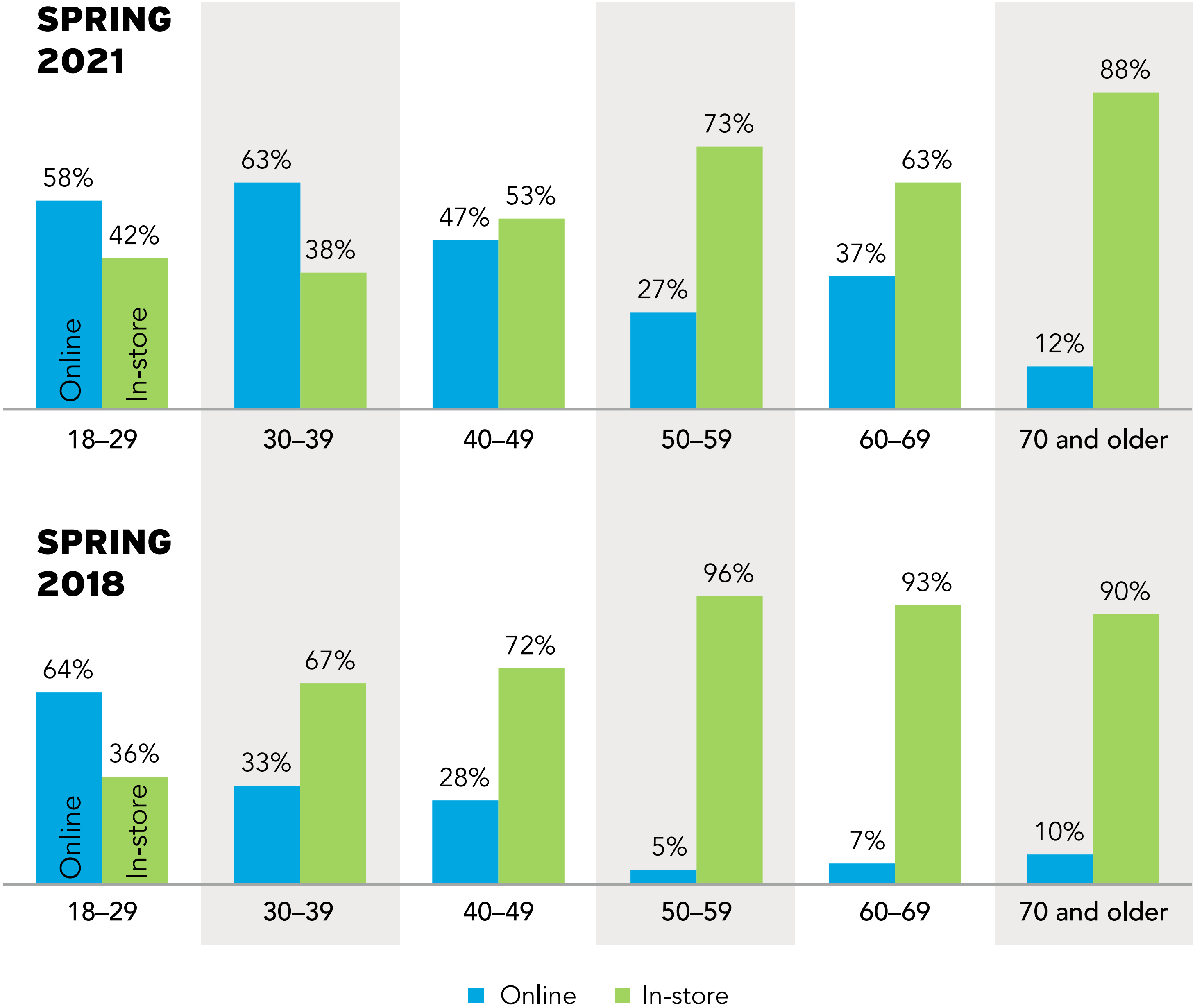
- Those with a college degree are more likely to buy online shipped to their home, at 49%, as are those with a postgraduate degree, at 56%. Shopping in-store is the preferred method for those with some college (50% in-store) and a high school degree or less (47%).
- A majority (59%) of Asian shoppers are purchasing online shipped to their home.
- More women plan to shop in-store (47%) than men (43%).
- Shopping in-store is the preferred method of shopping for those in the West (53%) and Midwest (46%), while online shipped to home is preferred in the Northeast (50%) and South (47%).
- Shoe shoppers under 50 are more likely to shop online shipped to their home (56%), while shoppers over the age of 50 are more likely to shop in-store (63%).



How has COVID changed shoe shopping behavior by age category?

(National, March 22-23, 2021, Likely Shoe Buyers, MM)

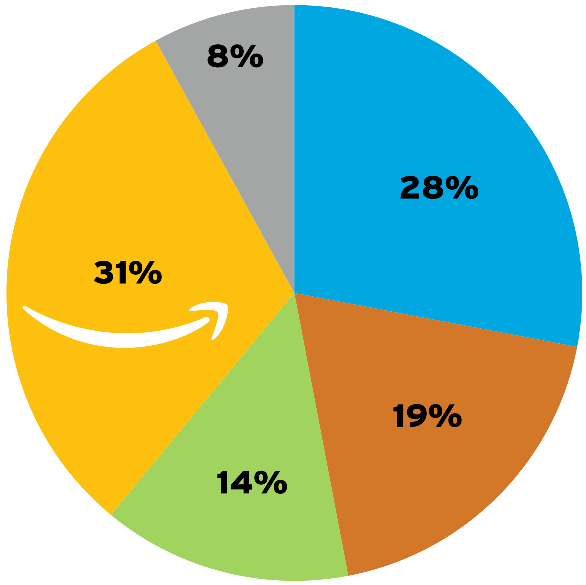
Using data from this survey and a Spring 2018 survey conducted by FDRA and Emerson College Polling, there is a noticeable increase of shopping online by age category. Shoppers who ordered online to pick up curbside this year were placed into the in-store category. While the youngest shoppers, those 18–29, are shopping online at a slightly lower rate in 2021 (58%) than 2018 (64%), all other age categories have seen a shift to e-commerce. Among those 30–39, 63% plan to purchase online, compared to only 33% in 2018. Among those 40–49, 47% are shopping online, compared to 28% in 2018. Among those 50–59, 27% are shopping online, compared to only 5% in 2018. Among those 60–69, 37% are shopping online, a 30 point increase from 2018, when only 7% of those 60–69 were shopping online. Those 70 and older have only shifted slightly, as 12% are shopping online, compared to 10% in 2018.



Where do you plan to shop for shoes online if shipping to your home?

(National, March 22-23, 2021, MM, N=345, +/- 5.2%)

Among those who plan to shop online shipped to home (n=345), a plurality (31%) plan to use Amazon, while 28% will be shopping on the shoe brand's website. Nineteen percent (19%) will shop using a footwear specific site such as Zappos or Shoes.com, and 14% plan to use a retailer's website such as Nordstrom or Footlocker. Eight percent (8%) of online shoe shoppers plan to shop for shoes somewhere else online.

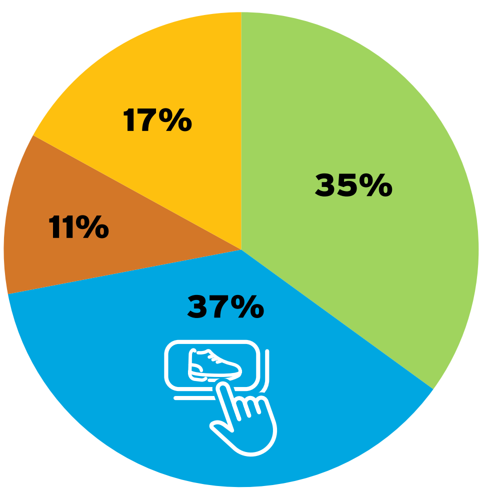


- Shoe brand's own website (NIKE, Steve Madden)
- Footwear-specific website (Zappos, Shoes.com)
- Retailer's website (Nordstrom, Footlocker, Target)
- Amazon
- Somewhere else

What's the main reason you purchase shoes on Amazon over a brand's or other retailer's website?

(National, March 22-23, 2021, MM, N=109, +/- 9.4%)

Among Amazon shoppers (n=109), a plurality (37%) rank the ease of doing a purchase as the top reason they choose Amazon. Thirty-five percent (35%) say the price is the top reason, while 17% say the shipping speeds, and 11% say the ease in returning items is the top reason.

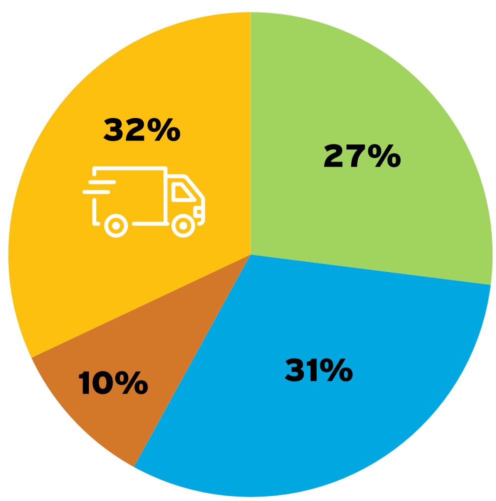


- Price
- Easy to return items
- Ease of purchase
- Shipping speeds

What's the second main reason you purchase shoes on Amazon over a brand's or other retailer's website?

(National, March 22-23, 2021, MM, N=84, +/- 10.7%)

Among Amazon shoppers who gave a different second reason that they prefer using Amazon, (n=84), shipping speeds ranked first at 32%, followed by ease of purchase (32%), price (27%), and ease in returning (10%).



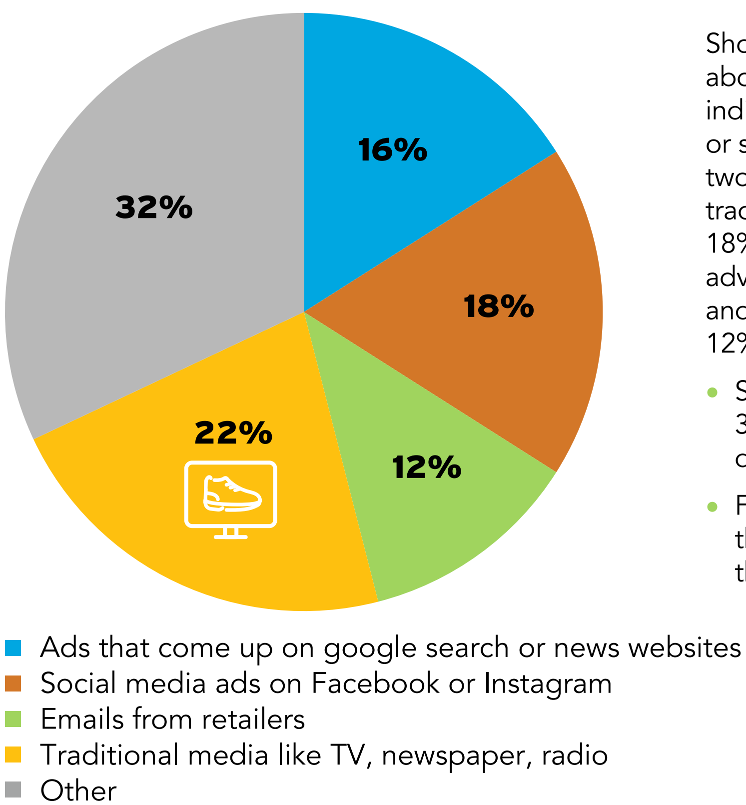
- Price
- Easy to return items
- Ease of purchase
- Shipping speeds

Which type of in-store location do you plan to shop for shoes – either ordered online for pick up or in-store? *(National, March 22-23, 2021, MM, N=440, +/- 4.6%)*

For shoe shoppers that plan to purchase in-store, a plurality (39%) plan to shop at a local store such as DSW or Famous Footwear, while 27% plan to shop at a big box retailer like Target, 15% plan to shop at a department store like Nordstrom, and 19% plan to shop at a different in-store location.

- Women report being most likely to shop at a local store (44%) or big box retailer (29%), while men are split between shopping at a local store (35%), big box retailer (25%), or somewhere else (25%).
- Several subgroups reported high percentages that planned on shopping "somewhere else" than the options given:
  - A majority (50%) of Hispanic in-store shoppers
  - A plurality (35%) of in-store shoppers aged 18–29
  - Twenty-seven percent (27%) of in-store shoppers in the Western US

What is the primary source of information about a retailer and their product offerings that make you shop in their store or on their website? *(National, March 22-23, 2021, MM, N=677, +/- 3.7%)*



Shoppers were split on their primary source of information about shoe retailers; a plurality (32%) of respondents indicated that they get their information from "other", or somewhere not listed in the answer choices. Twenty-two percent of these shoppers get their information from traditional media such as newspapers, tv, and radio, while 18% reported social media ads as their main source. Online advertisements are the main source for 16% of respondents, and emails directly from retailers are the main source for 12% of these shoppers.

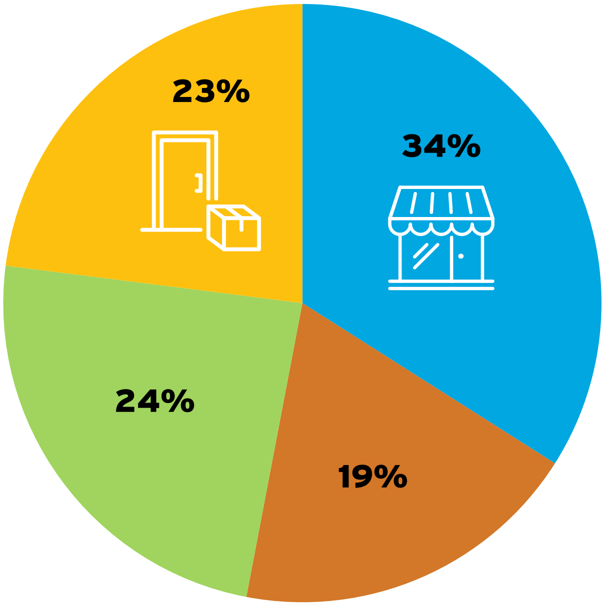
- Social media ads rank higher for those 18–29 (30%), those 30–39 (31%), Asians (31%), and those with a college degree (30%).
- Forty-seven percent (47%) of Hispanic shoppers reported that they get their information from another source than the options given.

SURVEY QUESTIONS AND RESULTS

COVID has changed many people's shopping habits. What best describes how you see yourself shopping for shoes going forward even after the pandemic ends?
(National, March 22-23, 2021, MM, N=1,002, +/- 4.3%)

A plurality (34%) of respondents plan to purchase nearly 100% of their shoes in-store after the pandemic. Twenty-four percent (24%) say 60 percent of their shopping will be online, and 40 percent will be in-store, while 23% say nearly 100% of their shoe purchases will be online going forward, and 19% say 60 percent will be in-store, and 40 percent will be online.

- Pluralities of those 30–39 (39%) and 18–29 (35%) plan to shop nearly 100% online in the future.
- A plurality of 50–59 (46%), 60–69 (44%), and 70+ (57%) plan on shopping fully in person in the future.
- Thirty-seven percent (37%) of those with some college or high school or less plan on shopping 100% in stores, while those with a college degree (32%) and a graduate degree or higher (29%) plan on shopping 60% online and 40% in store

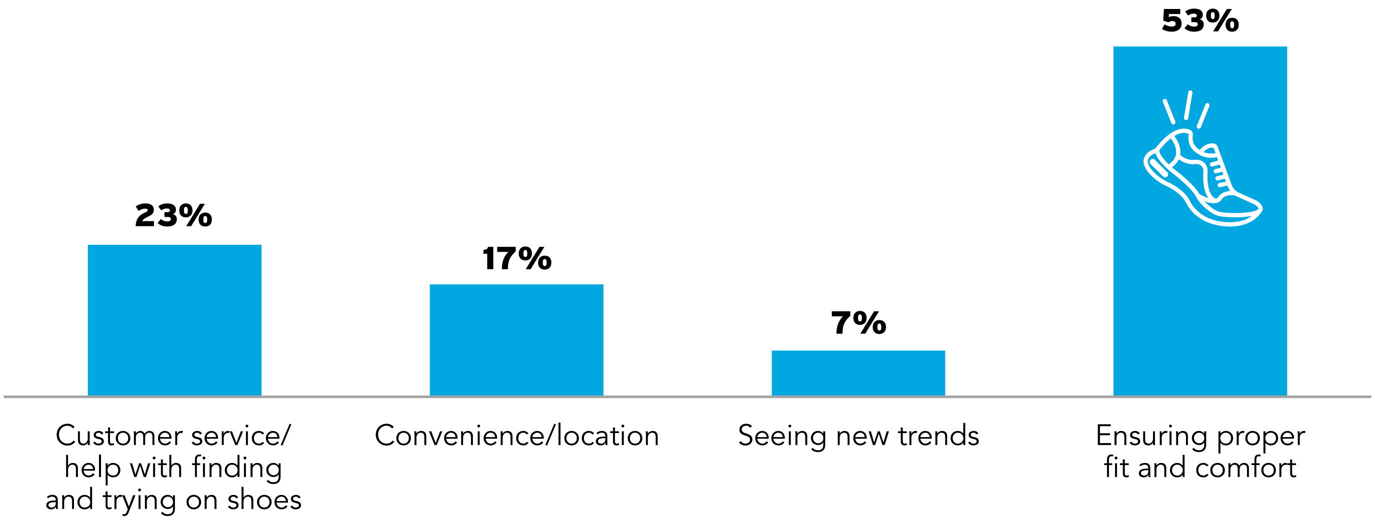


- Nearly 100% of my shoe purchases will be in-store
- Around 60% of my shoe purchases will be in-store and 40% will be online
- Around 60% of my shoe purchases will be online and 40% will be in-store
- Nearly 100% of my shoe purchases will be online and shipped to my home

When you buy shoes in stores, what do you like most about the in-store shopping experience? *(National, March 22-23, 2021, MM, N=1,002, +/- 4.3%)*

Ensuring proper fit and comfort is the primary benefit of the in-store shoe shopping experience for the majority (53%) of respondents. Twenty-three percent (23%) reported customer service or help with finding and trying on shoes, while 17% said convenience or location, and 7% said seeing new trends.

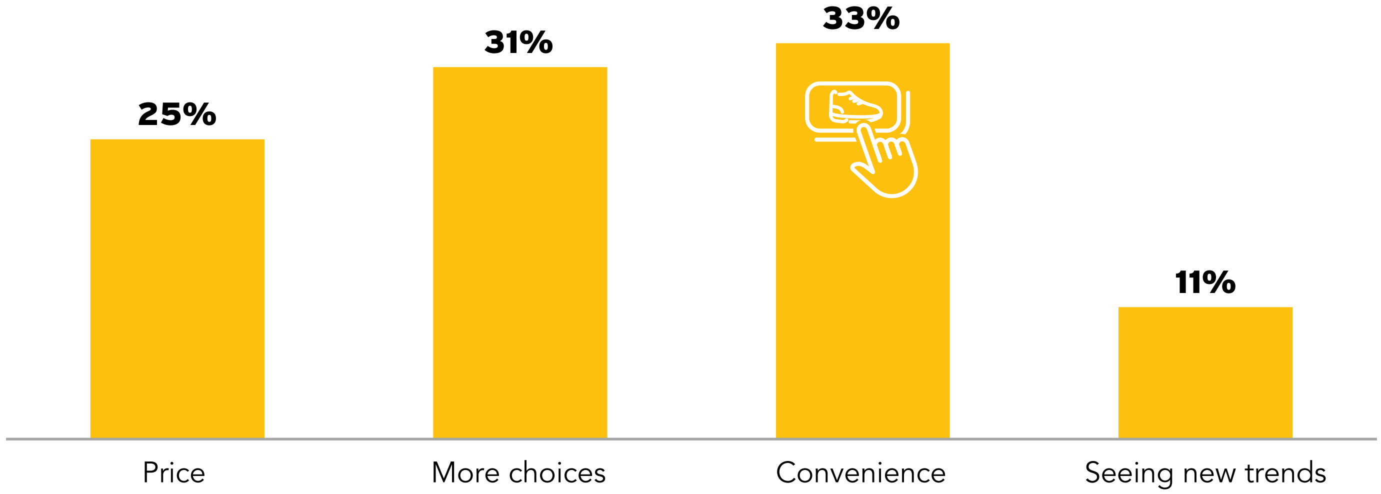
- A strong majority (67%) of those with a graduate degree or higher shop in stores for proper fit and comfort.



When you shop for shoes online, what do you most like about shopping online versus buying in-store? *(National, March 22-23, 2021, MM, N=1,002, +/- 4.3%)*

Respondents were split on the primary benefit of online shopping: 33% said convenience, 31% said more choices, 25% said price, and 11% said seeing new trends.

- A majority (50%) of Hispanic respondents, a plurality (45%) of those 18–29, and a plurality (36%) of men said the variety of choice was the best part about shopping online.
- Pluralities of those 50–59 (35%), 60–69 (45%), and 70+ (39%) reported shopping online because of convenience.

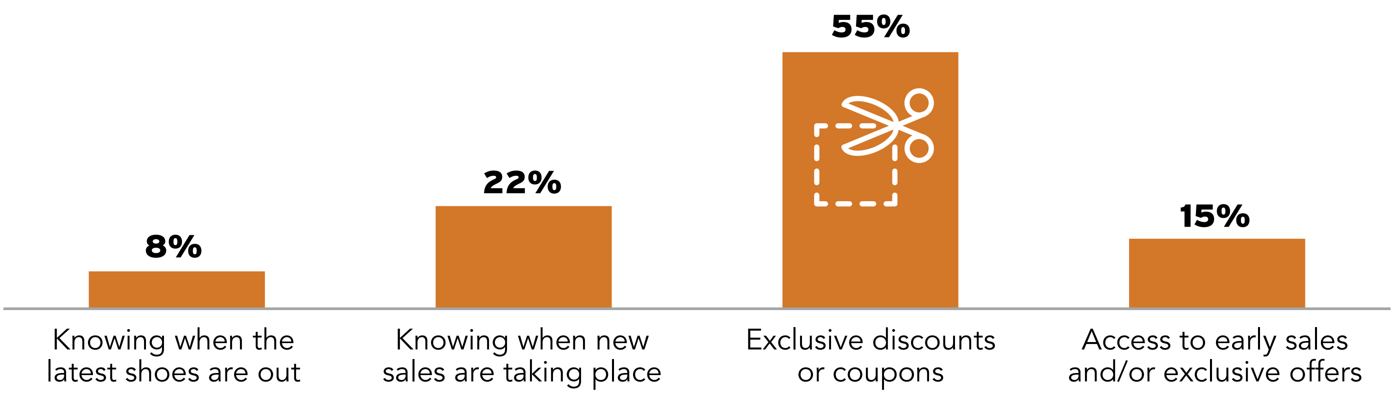


If you sign up for a rewards program, what is the main benefit you are seeking?

(National, March 22-23, 2021, MM, N=1,002, +/- 4.3%)

Exclusive discounts or coupons is the main benefit of signing up for a rewards program for a majority (55%) of respondents. Knowing when new sales are taking place was the primary benefit of signing up for 22% of respondents, followed by access to early sales and/or exclusive offers for 15% of respondents, and knowing when the latest shoes are out for 8% of respondents.

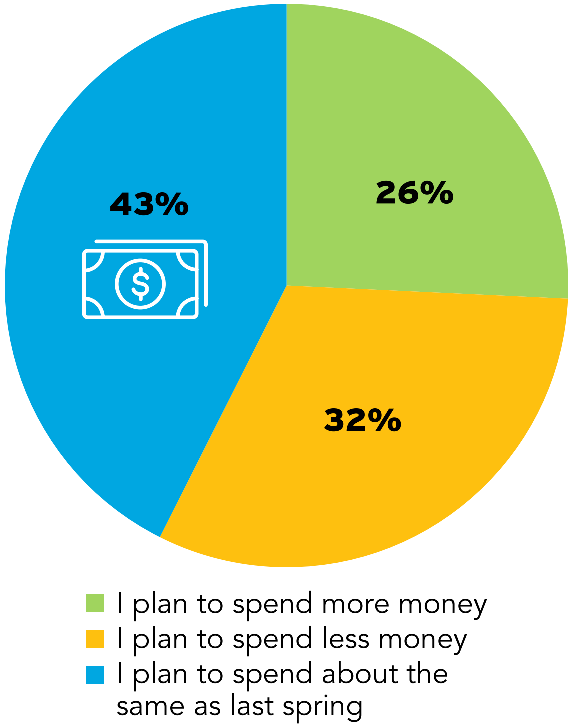
- A plurality of respondents within all age groups sign up for rewards programs for the goal of attaining exclusive discounts or coupons.
- In the Midwest, a higher proportion (19%) of respondents reported signing up for rewards programs in order to gain access to early sales and/or exclusive offers.



Do you plan on spending more or less money this spring compared to last spring on shoes for yourself and your family? *(National, March 22-23, 2021, MM, N=785, +/- 3.4%)*

A plurality (43%) of likely shoe buyers indicated that they plan to spend the same amount of money this spring as last year. Thirty-two percent (32%) plan to spend less, and 26% plan to spend more this year.

- Thirty-nine percent (39%) of Hispanic shoe shoppers plan to spend more this spring than last year. A majority (50%) of Black/African-American shoe shoppers plan to spend less this year.
- A plurality (39%) of shoe shoppers 70 and older plan to spend more compared to last spring, while forty-one percent (41%) of 40–49 year olds plan to spend less, and fifty-two percent (52%) of 60–69 year olds plan to spend the same amount of money on shoes.



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

(National, March 22-23, 2021, MM, N=785, +/- 3.4%)

Among shoe buyers, the plurality (48%) plan to spend between $100–$250 on shoes this spring. Forty percent (40%) plan to spend less than $100, while 11% plan to spend between $250–$500, and 1% plan on spending over $500 on footwear this spring.

- A strong majority (67%) of Hispanic/Latino shoe shoppers plan to spend between $100–$250.
- The highest proportion of shoppers that plan to spend between $250–$500 on shoes this spring are those aged 50–59 (18%).