



FDRA + FFANY

National Back to School 2021 Footwear Shopper Survey Report

Shoe Sales and Consumer Behavior
Insights From 1,000 Families Nationwide

JULY 2021

Conducted by

Emerson College

P O L L I N G

This survey was commissioned by



FASHION FOOTWEAR ASSOCIATION OF NEW YORK

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



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).

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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 Back to School footwear shoppers. All respondents interviewed in this study were part of a fully representative sample using an area probabilistic sampling method of N=1,000 (sample size) parents of school aged children who will purchase footwear for their child(ren) this fall. The margin of error for the sample is +/- 3.0 % in 19 of 20 cases.

The survey was administered by contacting landline telephones via IVR, cell phones via SMS-to-web, and online via a panel provided by Amazon MTurk, and was conducted between July 19–20, 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.

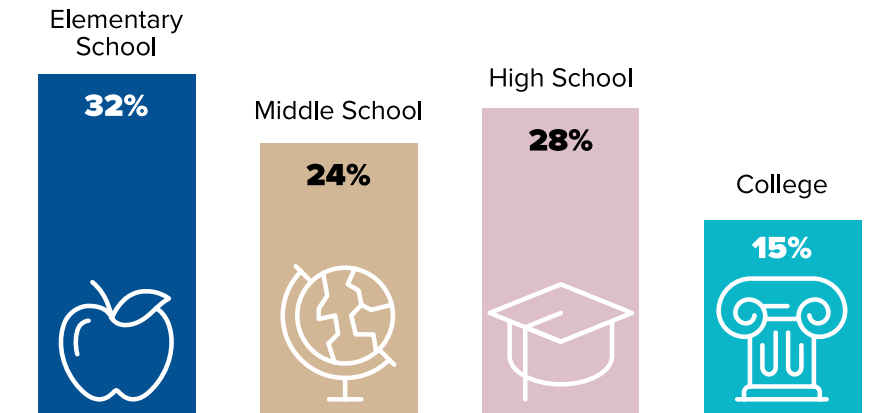
The purpose of these statistical tests is to determine whether or not the observed difference between sub-groups in the sample is due to sampling error or whether it is due to a real difference in the population. When the results are statistically significant, it strongly suggests that the observed difference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

SURVEY QUESTIONS AND RESULTS

What level of school is your oldest school aged child? *(National, Back to School Shoppers, July 19–20, 2021, MM, N=1,000, +/- 3%)*

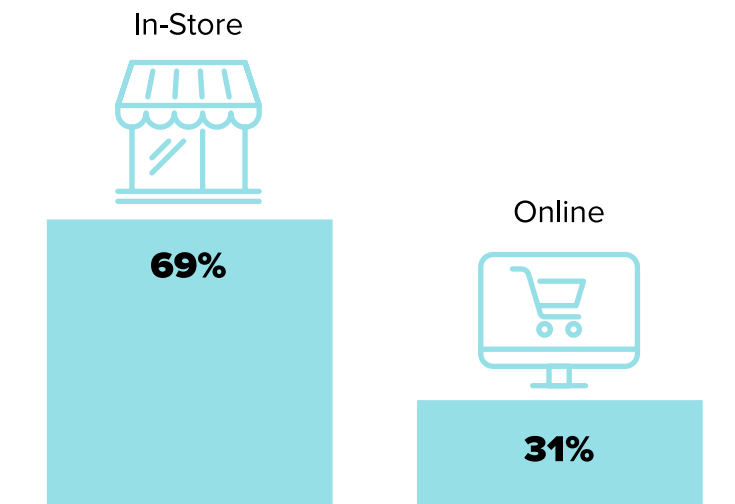
- When asked the grade level of their oldest child, 32% of Back to School shoppers said Elementary School, 24% said Middle School, 28% said High School, and 15% said College.
- Seventy percent (70%) of parents with children in K–12 plan to purchase shoes in a store, while 56% of parents with a college child plan to purchase shoes in a store.
- Fifty-seven percent (57%) of Parents of K–12 children plan to purchase their footwear before the middle of August, compared with 37% of Parents of College aged children.



- Parents' price range per pair of shoes correlates with the age of the child. Fifty-eight percent (58%) of Elementary school Parents will spend \$40–60 on a pair of shoes, 39% of Middle and High School parents will pay \$40–60 per pair of shoes, while only 17% of College students' parents report spending \$40–60 per pair of shoes.
- Parents of older children plan to spend more on shoes than parents of younger children. Thirty-five percent (35%) of Elementary school Parents plan to spend up to \$100 on kids shoes, 23% of High school and College Parents plan to spend up to \$100, while only 12% of college parents will spend only \$100.

Where do you expect to purchase shoes for your child? *(National, Back to School Shoppers, July 19–20, 2021, MM, N=1,000, +/- 3%)*

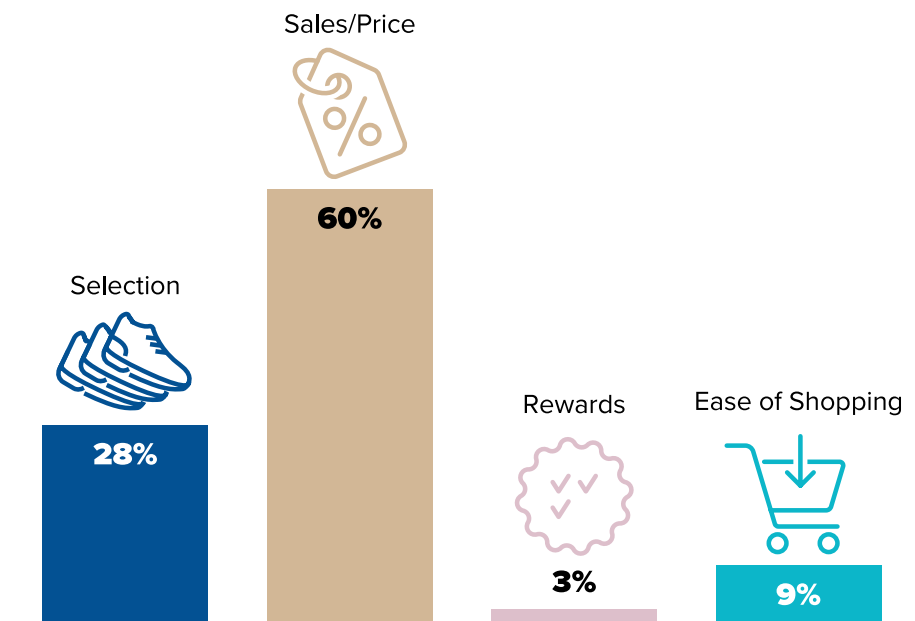
- A strong majority (69%) of prospective Back to School shoppers plan to shop for their children in-store, compared to 31% who plan to do their family's shoe shopping online.
- There is a significant difference on education attainment: families with at least some college are more split between online and in-store shopping (63% in-store vs. 37% online), and families with a high school degree or less lean more towards shopping in-store (83% in-store vs. 17% online).
- By race, Black families are slightly more likely to shop in-store (74%), and Asian families are shopping more online (41%) than any other racial group.



SURVEY QUESTIONS AND RESULTS

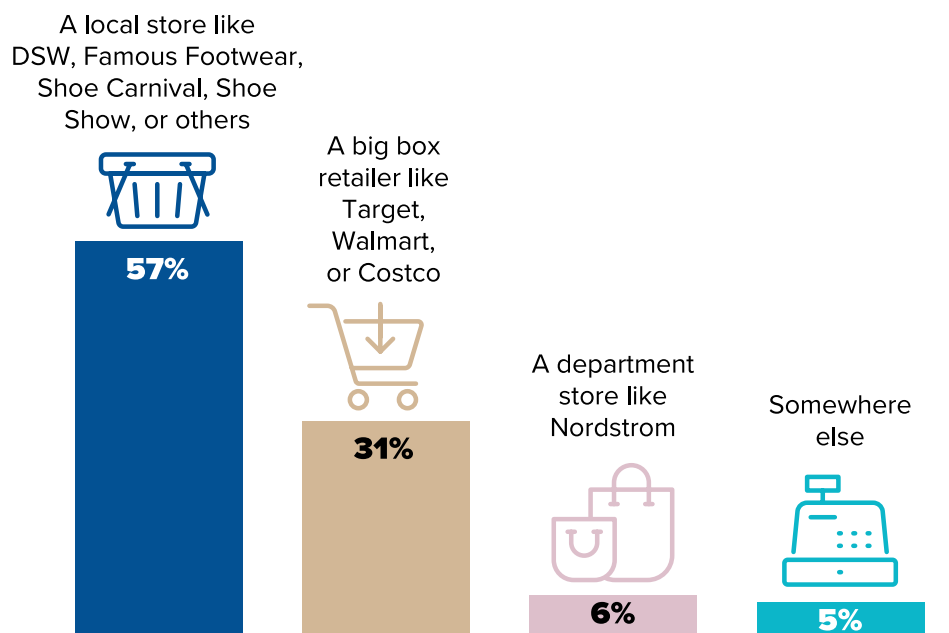
What factor most influences where you shop in-store? *(National, Back to School Shoppers, July 19–20, 2021, MM, N=693, +/- 3.7%)*

- Sales and the price of shoes rank as the most influential factor for Back to School shoppers, at 60%. Selection of shoes was the next most influential factor at 28%, followed by ease of shopping at 9%, and rewards at 3%.
- Women prioritize sales at a higher rate (67%) than men (54%), while men ranked selection higher (34%) than women did (22%).
- Asian families ranked selection as the most influential factor at a higher rate (42%).
- Selection was also a more important factor with those with a college degree or higher, at 34%. Among those with a high school degree or less, sales and price was the top factor for 78% of families.



Which type of in-store location do you plan to shop for shoes—either ordered online for pick up or in-store? *(National, Back to School Shoppers, July 19–20, 2021, MM, N=693, +/- 3.7%)*

- A local store like DSW, Famous Footwear, Shoe Carnival, or Shoe Show was the most popular shopping location for a majority (57%) of families. Thirty-one percent (31%) of families are doing their Back to School shopping at a big box retailer like Target, Walmart or Costco, while 6% are going to a department store like Nordstrom, and an additional 6% said they were planning on shopping somewhere else.
- Hispanic families (74%) and Asian families (69%) plan to shop at local stores like DSW, Famous Footwear, Shoe Carnival, or Shoe Show at a higher rate, while White families (37%) and Black families (35%) plan to shop at big box retailers like Target, Walmart or Costco at higher rates.

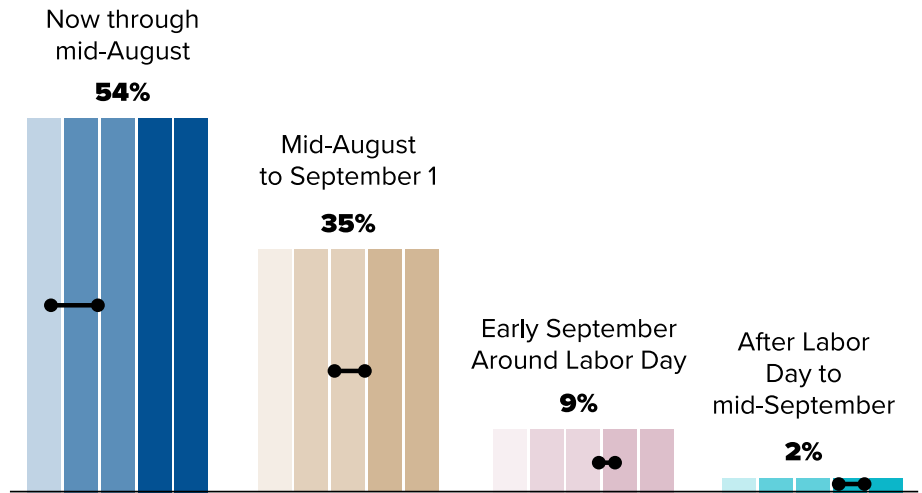


- Respondents aged 18–29 (67%) and 65 and older (68%) were both more likely to shop at local stores at higher rates. Those 50–64 were the most likely to shop at big box retailers, at 37%.

SURVEY QUESTIONS AND RESULTS

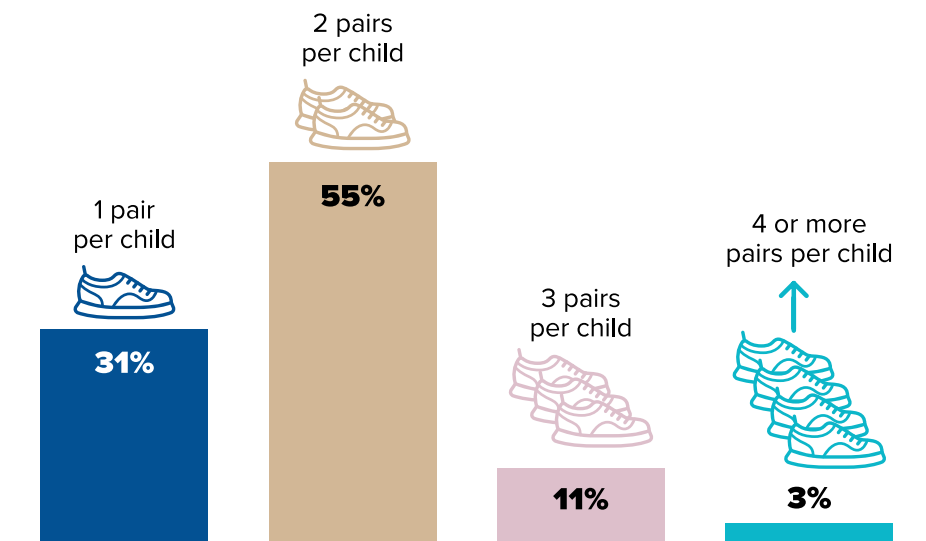
When do you plan to buy shoes for back to school? *(National, Back to School Shoppers, July 19–20, 2021, MM, N=1,000, +/- 3%)*

- A majority (54%) of families are doing their Back to School shopping between now and mid-August, while 35% are shopping the second half of August. Nine percent (9%) plan to shop in early September, and only 2% are waiting until after Labor Day.
- Women plan to shop sooner, with 63% doing their shopping between now and mid-August. Men that are shopping are more split, with 47% shopping now, and 40% shopping between mid-August and September 1st.
- Black families are split between shopping now to mid-August (47%) and mid-August to September 1st (41%). Hispanic families are shopping now to mid-August at the highest rate (60%).
- Majorities in all regions are doing their shopping now, apart from the Northeast, where a plurality (47%) plan to do their shopping from mid-August to September 1st.



How many pairs per child do you expect to buy for Back to School? *(National, Back to School Shoppers, July 19–20, 2021, MM, N=1,000, +/- 3%)*

- A majority (55%) of families said they plan to buy two pairs of shoes per child this Back to School season, while 31% plan to buy one pair per child, 11% plan to buy three pairs per child, and 3% plan to buy four or more pairs of shoes per child.
- Asian families were the most likely to report purchasing three or more pairs of shoes per child, at 19%. Hispanic families were the most likely to report purchasing four or more pairs of shoes per child, at 8%.
- Shoppers aged 65 and older were also much more likely to report plans to purchase four or more pairs of shoes per child in their family, at 29%.
- A plurality (42%) of those that reported an income of over \$150,000 only plan on purchasing one new pair of shoes per child this Back to School season
- Those with a college degree or higher are the most likely to be waiting to shop, with 16% of this group shopping around Labor Day.

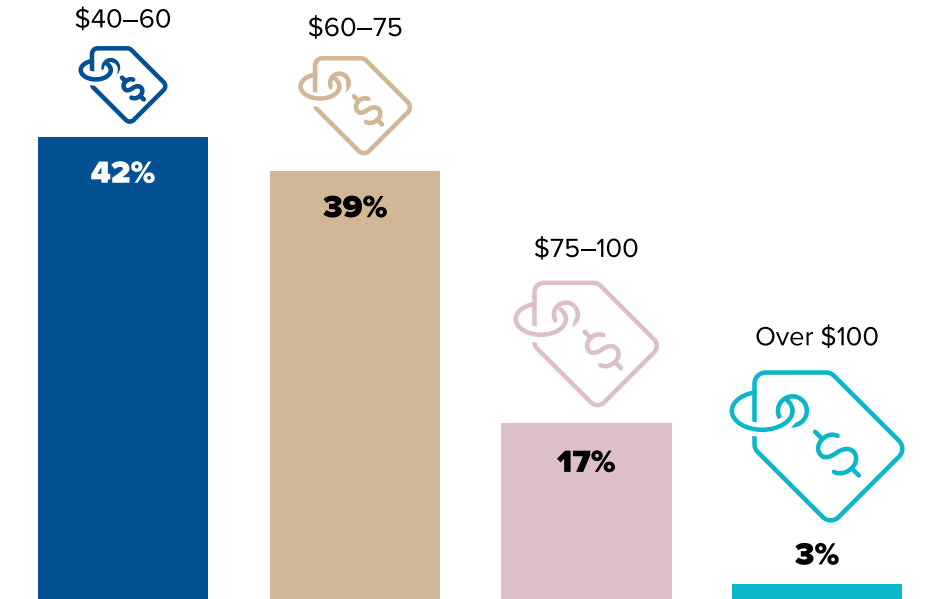


SURVEY QUESTIONS AND RESULTS

What is the price range, per pair of shoes, that you expect to shop for?

(National, Back to School Shoppers, July 19–20, 2021, MM, N=1,000, +/- 3%)

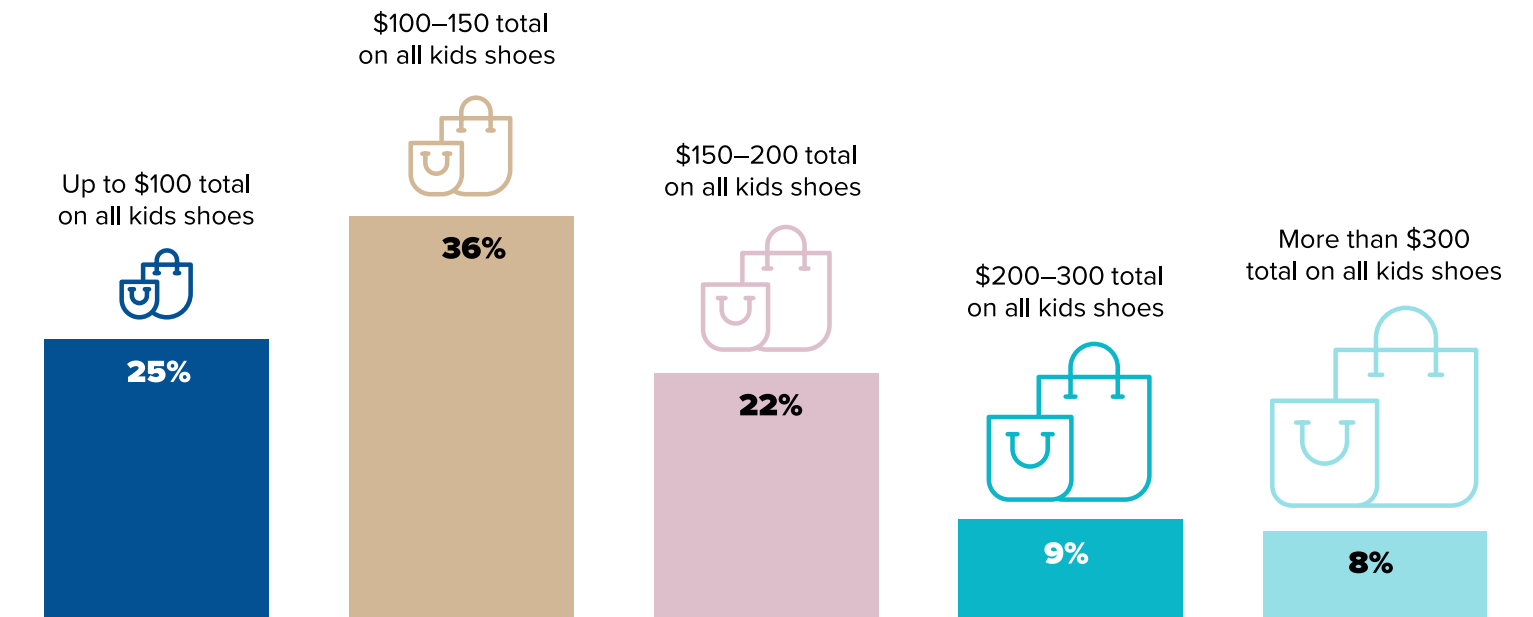
- Shoppers were split on the price range they expect per pair of shoes, with 42% saying between \$40–60, and 39% saying between \$60–75. Seventeen percent (17%) said between \$75–100, and 3% said over \$100.
- Men shopping for their families were more likely to expect the \$60–75 price range, at 46%, while a majority (52%) of women shopping expect to pay between \$40–60 per pair.
- By educational attainment, a plurality of those with a high school degree or less (49%) expect to spend \$40–60 per pair. For those with a college degree or higher, a plurality (48%) expect to spend between \$60–75 per pair.



What is the total amount you expect to spend on all your kids for shoes this back-to-school season?

(National, Back to School Shoppers, July 19–20, 2021, MM, N=1,000, +/- 3%)

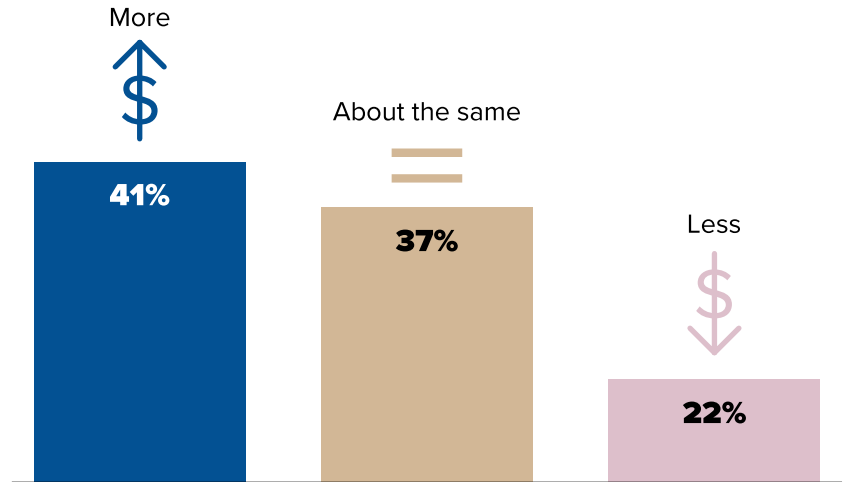
A plurality (36%) of Back to School shoppers plan to spend between \$100–150 total on all shoes this season. Twenty-five percent (25%) plan to spend up to \$100, while 22% plan to spend between \$150–200. Nine percent (9%) plan to spend between \$200–300, and 8% plan to spend more than \$300.



SURVEY QUESTIONS AND RESULTS

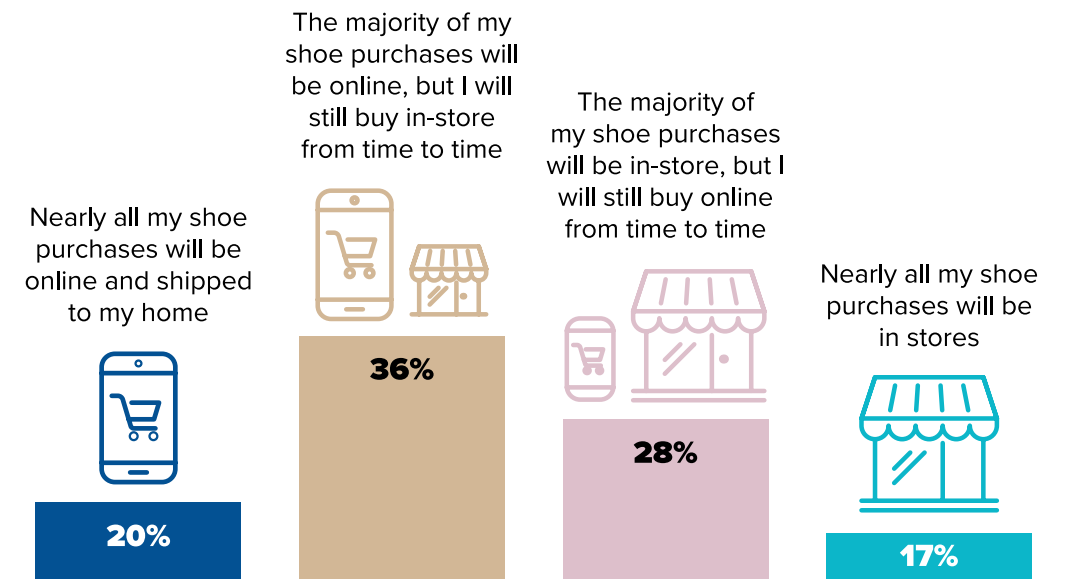
Is your total expected spending on shoes this year more or less than in 2019, before COVID impacted in-person teaching? *(National, Back to School Shoppers, July 19–20, 2021, MM, N=1,000, +/- 3%)*

- A plurality (41%) of families report that they plan to spend more this year on Back to School shoes than in 2019, while 37% plan to spend around the same, and 22% plan to spend less this year.
- Asian families reported plans to spend less this year at a higher percentage (43%), while Black families reported planning to spend more at a higher rate (46%).
- Shoppers aged 18-29 also reported planning to spend more at a higher rate of 46%.
- A majority (52%) of shoppers in the Northeast are planning on spending more on shoes this year.



What best describes how you see yourself shopping for your family's shoes going forward? *(National, Back to School Shoppers, July 19–20, 2021, MM, N=1,000, +/- 3%)*

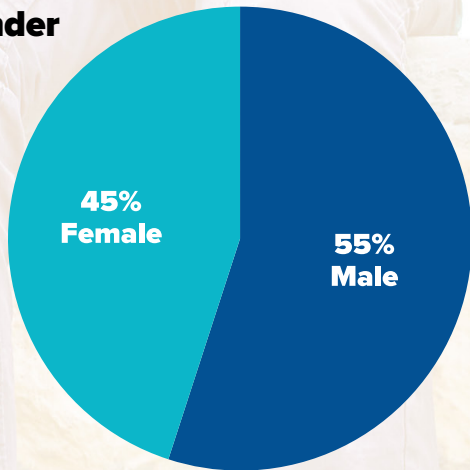
- A plurality (36%) of shoppers said that they plan to shop online primarily, with in-store shopping time-to-time. Twenty-eight percent (28%) said that they will shop primarily in-store, with time-to-time online purchases. Twenty percent (20%) said that nearly all of their shoe shopping will be done online going forward, and 16% said nearly all of their shoe shopping will be in-stores.
- Men shopping for their families reported intending to shop mostly (41%) or nearly all (22%) online at higher rates, while women were more likely to plan to shop mostly (31%) or nearly all (23%) in-store going forward.
- Those with a college degree or higher reported plans to shop online mostly (44%) or nearly all (21%) at slightly higher rates. For those with a high school degree or less, a majority (58%) plan to shop either mostly (32%) or nearly all (26%) in-stores.



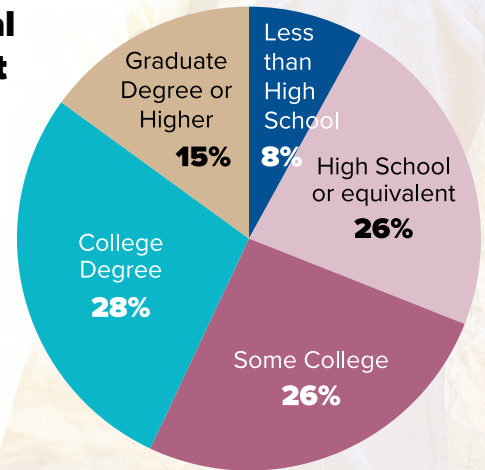
DEMOGRAPHICS

(National, Back to School Shoppers, July 19–20, 2021, MM, N=1,000, +/- 3%)

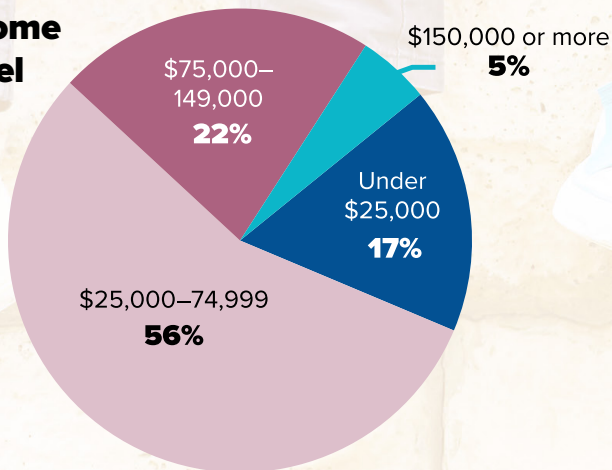
Gender



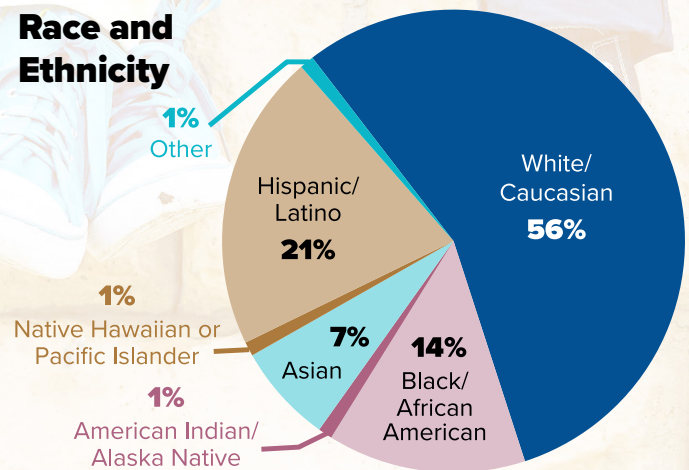
Educational Attainment



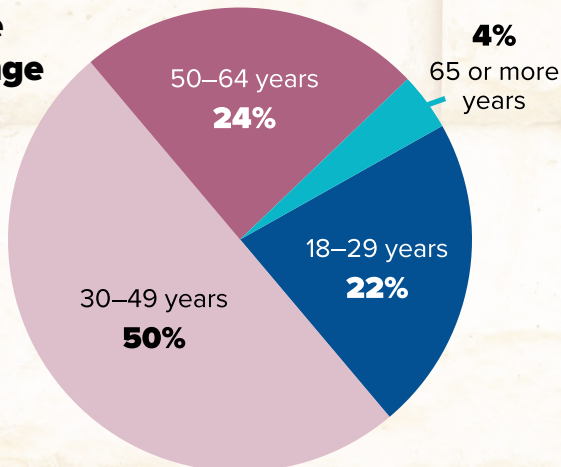
Income Level



Race and Ethnicity



Age Range



Region

