

FDRA + FFANY

2021 Holiday Shoe Sales Survey

Nationwide survey of footwear consumer purchasing habits this holiday season



Conducted by

Emerson College
POLLING

This survey was commissioned by



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.

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P O L L I N G

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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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.

METHODOLOGY

Emerson College Polling, under the supervision of Associate Professor Spencer Kimball, is pleased to present the Footwear Distributors and Retailers of America with the findings from a survey of likely holiday footwear shoppers. All respondents interviewed in this study were part of a fully representative sample using an area probabilistic sampling method of N=941 (sample size). The margin of error for the sample is +/- 3.1% in 19 of 20 cases.

An initial response of n=1,182 people entered the survey with n=241 (20%) who said they were not likely to purchase shoes. The entire sample was weighted by age, gender, ethnicity, education and region based on US Census data; and then only very likely and somewhat likely voters were used for analysis.

The survey was administered by contacting landline telephones via IVR, cellphones via SMS message, and online via a panel. The survey was conducted between October 12–15, 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.

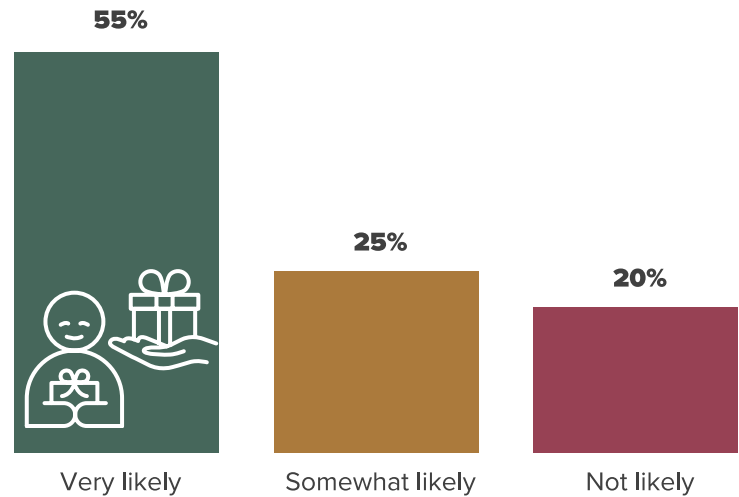
A chi-square significance level of .05 indicates significance at the 95 percent level. In other words, it is 95 percent likely that the results are due to a real difference between comparison groups. A chi-square significance level of .01 indicates significance at the 99 percent level. When a t-test 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 yourself or as gifts this holiday season?

(National, October 12–15, 2021, MM, N=941, +/- 3.1%)

- A combined 80% of those who entered the survey said they are very or somewhat likely to purchase new shoes this holiday season. A majority (55%) of respondents said they were very likely, a quarter (25%) said they are somewhat likely, and 20% said they were not likely at all to purchase.
- Respondents that reported being very likely to purchase this holiday season include: those 30–39 (72% very likely), those 40–49 (69% very likely), Asian respondents (76% very likely), Black respondents (70% very likely), and Hispanic respondents (66% very likely).
- Men were also more likely to report being very/somewhat likely to buy shoes (84% likely) than women (75% likely).
- Compared to the 2020 FDRA/Emerson College Polling survey, the percentage of respondents that are very unlikely to buy shoes this season has decreased by 14%, from 34% to 20%.



72%



Online purchase shipped directly to my home

28%



In-store purchase or pickup curbside from a local retailer

Do you plan on making your holiday shoe purchase online for home delivery, or do you plan on going into a local retailer store to buy shoes?

(National, October 12–15, 2021, MM, N=941, +/- 3.1%)

- Seventy-two percent (72%) of likely shoe buyers are planning on making their holiday shoe purchases online, while 28% are planning on shopping in-store or for curbside pickup.
- Majorities of all age categories plan to shop online apart from those 65 and older, who are split evenly, with 50% purchasing online and 50% planning to shop in-store.
- Hispanic respondents were more likely to shop in-store, with 42% reporting that as their plan. Black respondents were more likely to shop online, at 93%.
- Since the 2020 holiday survey, this question has stayed relatively stable, with a 1% shift towards shopping online.

SURVEY QUESTIONS AND RESULTS

Where do you plan on shopping in-store for shoes this holiday season?

(National, October 12–15, 2021, MM, N=264, +/- 6%)

- A plurality (45%) of respondents who plan to shop in-person for shoes this holiday season (n=264, +/-6%) plan to shop at shoe store chains, while 34% plan to shop at large mass retail stores, and 21% plan to shop at department stores.
- A plurality or majority of all age groups plan to shop at shoe store chains other than those aged 50–64, where the majority (68%) plan to shop at large mass retail stores, like Target, Walmart, or Costco.
- Among in-person shoppers whose income is under \$50,000 per year, 47% plan to shop at shoe store chains this holiday season. Among those earning \$50–75,000, 58% also plan to shop at shoe store chains. Of those making \$75–100,000, 57% plan to shop at large mass retail stores. The majority (53%) of those making above \$150,000 plan to shop at department stores.



Where do you plan on shopping for shoes online this holiday season?

(National, October 12–15, 2021, MM, N=677, +/- 3.7%)

- A plurality (37%) of respondents shopping for shoes online (n=677, +/-3.7%) will be shopping on Amazon. Thirty-two percent (32%) said they will purchase directly from the shoe brand’s website, 20% said they will purchase from a retailer (such as Nordstrom, Footlocker, or Target) website, 8% said they will use Zappos or another shoe specific website, and 3% said they will be purchasing somewhere else online.
- Men were more likely to plan on Amazon (39%) than women (34%).
- A majority (50%) of those making \$150,000 or more a year said they plan to shop directly from the shoe brand’s own website.

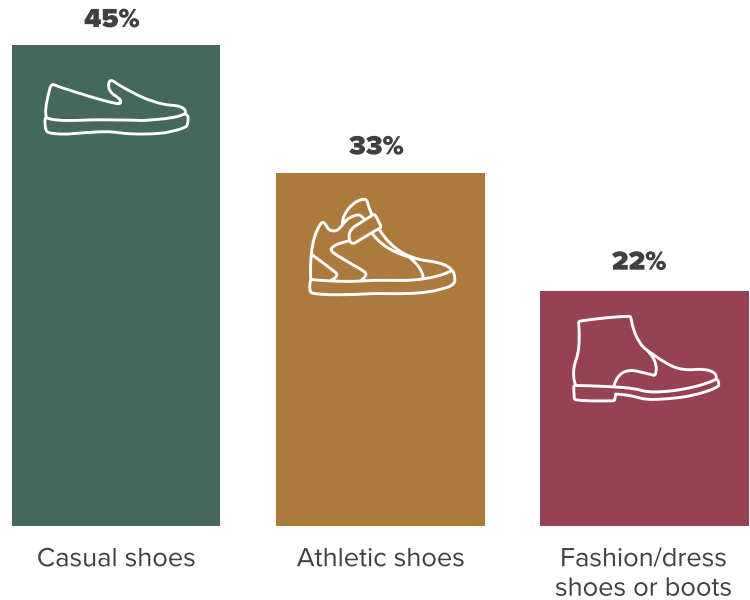


SURVEY QUESTIONS AND RESULTS

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

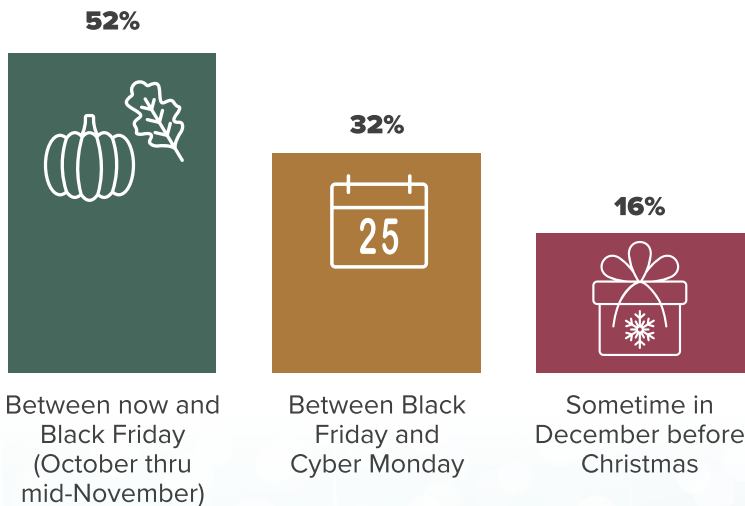
(National, October 12–15, 2021, MM, N=941, +/- 3.1%)

- Forty-five percent (45%) of respondents said they plan to purchase casual shoes, while 33% plan to purchase athletic shoes, and 22% plan to purchase fashion/dress shoes or boots.
- Men are most likely to purchase casual shoes (49%) or athletic shoes (38%), while women are split between planning to purchase casual shoes (40%), fashion/dress shoes or boots (32%), or athletic shoes (28%).
- Those most likely to purchase fashion/dress shoes or boots included: those 18–29 (27%), those 40–49 (29%), and Black respondents (31%).
- There has not been a significant change on this question since the 2020 holiday survey.



Retailers have already started their holiday marketing due to supply chain disruptions. When do you expect to make your holiday footwear purchases?

(National, October 12–15, 2021, MM, N=941, +/- 3.1%)

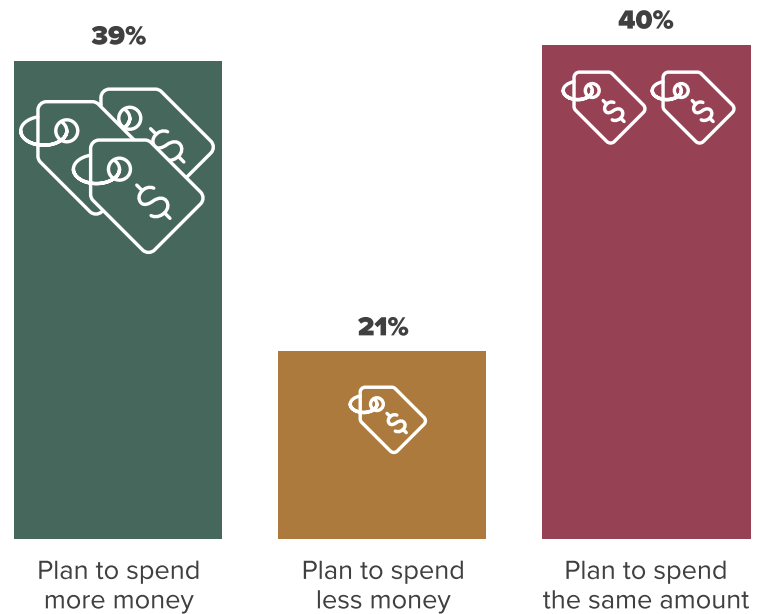


- A majority (52%) of respondents expect to make their holiday footwear purchases between now and Black Friday. Thirty-two percent (32%) plan to make purchases between Black Friday and Cyber Monday, and 16% expect to make holiday footwear purchases sometimes in December, before Christmas.
- Those aged 18–29 most strongly expect to make purchases between now and Black Friday at 64%. Fifty percent (50%) of those 30–49 expect to make purchases between now and Black Friday, as do 49% of 40–49-year-olds, and 43% of those over 65. Respondents 30–39 were more likely to report planning to purchase between Black Friday and Cyber Monday (39%), and respondents aged 65 and older were more likely to report planning to purchase sometime in December (31%).

SURVEY QUESTIONS AND RESULTS

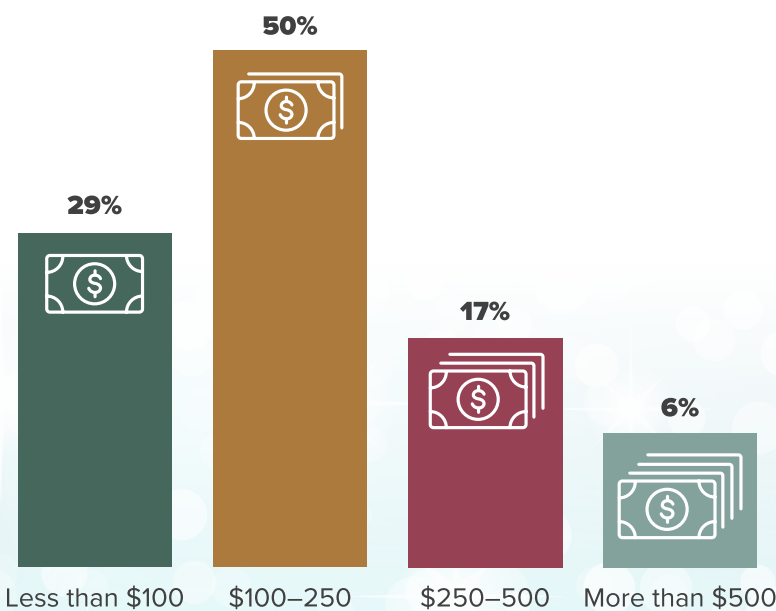
Do you plan on spending more or less money this holiday season on all the shoes you buy compared to last year? *(National, October 12–15, 2021, MM, N=941, +/- 3.1%)*

- Forty-percent (40%) of respondents plan to spend about the same amount of money this holiday season on shoes than they did last year, and 39% plan to spend more money on all shoes than they did last year. Twenty-one percent (21%) plan to spend less this holiday season on shoes compared to last year.
- A plurality (46%) of male respondents say they plan on spending more money this holiday season on all the shoes they buy than last year, compared to the plurality (43%) of female respondents who say they plan to spend the same amount as last year.
- The plurality of White respondents (44%) and Hispanic or Latino respondents (46%) plan to spend the same amount this year as last year, while the plurality of Black respondents (44%) and Asian respondents (50%) plan to spend more money this year on shoes than last.



- Since the 2020 holiday survey, the percentage of respondents who plan to spend more has increased eight points (31% to 39%), and the amount that plan to spend less has decreased sixteen points (37% to 21%).

What is the total amount of money you plan on spending on footwear this holiday season? *(National, October 12–15, 2021, MM, N=941, +/- 3.1%)*



- Half of respondents say they plan to spend a total of \$100–250 on all footwear this holiday season, 29% plan to spend less than \$100, 17% plan to spend between \$250 and \$500, and 6% plan to spend more than \$500 on all footwear this holiday season.
- Those 50–64 and 65 and older are much more likely to plan to spend less than \$100, at 36% and 44%, respectively.
- Black respondents were more likely to report planning on spending between \$250–\$500, at 33%.
- Since the 2020 holiday survey, the percentage of respondents who plan to spend less than \$100 has decreased four points (33% to 29%). The amount that plans to spend \$250–\$500 has increased five points (12% to 17%), and the amount that plans to spend more than \$500 has increased from 2% to 6%.

SURVEY QUESTIONS AND RESULTS

If you do not see typical holiday discounts will this impact your decision to buy a pair of shoes you really like and want? *(National, October 12–15, 2021, MM, N=941, +/- 3.1%)*

- A slim majority (51%) of respondents say the lack of a holiday discount will impact their decision to buy a pair of shoes they really like and want, while 49% say their decision is not impacted, if they want them they are going to buy them.
- Those aged between 18 and 29 are more impacted by the lack of a holiday discount, with 61% saying they are less likely to purchase shoes if they are not on sale. A majority (51%) of those aged 30–39 also say it makes them less likely to purchase shoes if they are not on sale, while the majority of those aged 40–49 (54%) and 50–64 (55%) say their decision is not impacted, if they want the shoes they are going to buy them. Those aged over 65 are reflective of the total population: 51% say it makes them less likely and 49% say it does not impact their decision to buy a pair of shoes.



No, if I want them I'm going to buy them

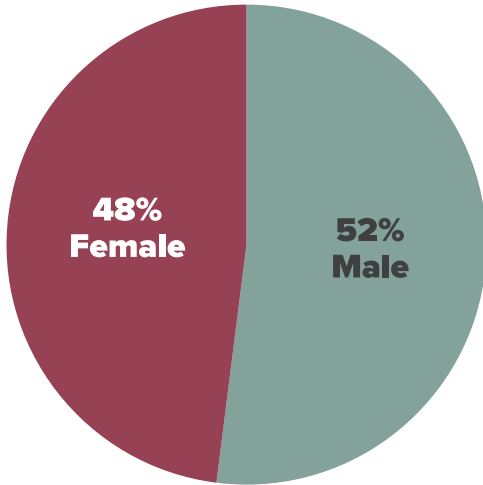


Yes, I'd be less likely to purchase them if they are not on sale

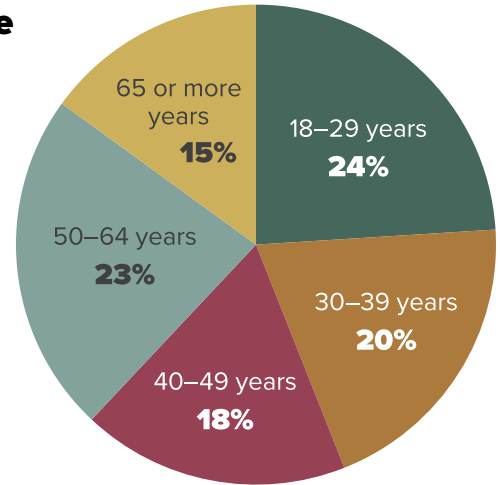
DEMOGRAPHICS

(National, October 12–15, 2021, MM, N=941, +/- 3.1%)

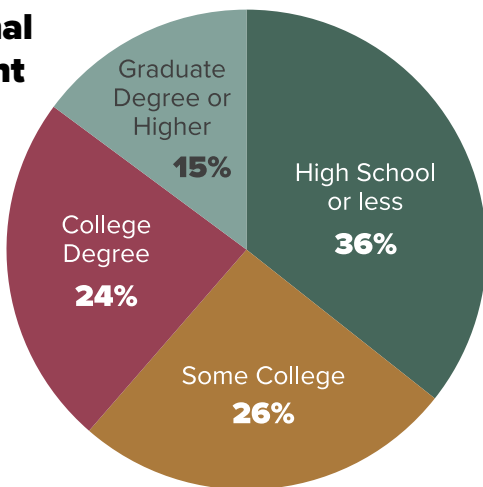
Gender



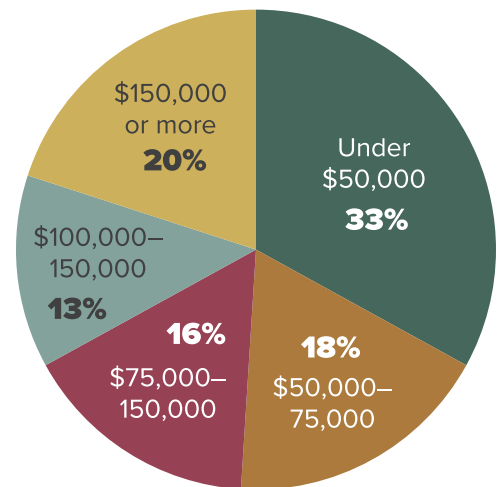
Age Range



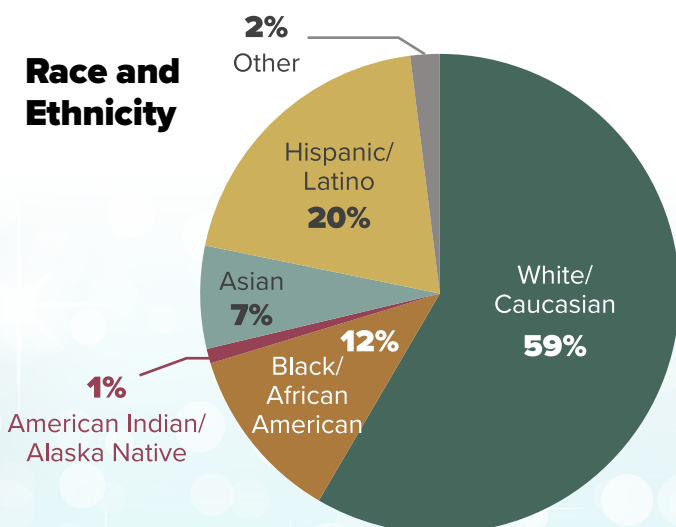
Educational Attainment



Income Level



Race and Ethnicity



Region

