FDRA + FFANY

Back to School Footwear Shopper Survey Report

July 2023

Shoe Sales Forecast and Consumer Behavior Insights From 1,000 Families with School-Aged Children Nationwide

Methodology

Emerson College Polling is pleased to present the Footwear Distributors and Retailers of America with the findings from a survey of parent back-to-school shoe shoppers.

All respondents interviewed in this study were part of a proportional sample of United States residents and then screened out for parents/guardians of children in elementary school through college; and self-reported back-to-school shoe shoppers, n=1,000 (sample size). The credibility interval for the sample is +/- 3% in 19 of 20 cases. The survey was administered online via a panel and email. The survey was conducted between July 21–23, 2023. The sample was weighted by age, gender, ethnicity, education, and region based on US Census data.

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 poulation 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 was published by

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FOOTWEAR DISTRIBUTORS & RETAILERS OF AMERICA — 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.

Survey conducted by Emerson College POLLING

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Looking for more information on the footwear industry?

Visit **FDRA.org** to find a range of stats, data and analysis and subscribe to Shoe-in Show to hear industry leaders discuss business insights and trends!

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.

Executive Summary

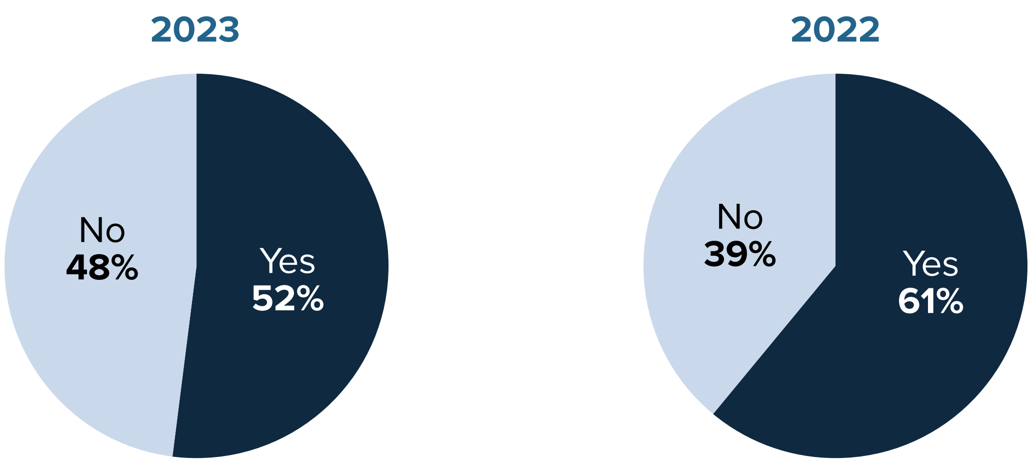
More so than in past years, due to changing economics and spending power, shoe companies will face extremely focused parents shopping for back to school shoes. We surveyed 1,000 families with school-aged children–from elementary to college—who were planning to buy shoes for them this back-to-school season. Here are some highlights of the most interesting consumer insights and shifts over the last year:

- Families are exploring shoes less on social media than last year. We believe this is due to budget issues and could mean they consider price points and overall spend paramount over aesthetics.
- Around 80% of low- to middle-income families plan to shop in stores this season versus online, with only 65% of families with incomes over $150,000 shopping in stores.
- 60% of all families are shopping in stores because they think they will find the best deals.
- In a 20% jump over 2022, 69% of families are buying shoes now through mid August.
- 52% of families plan to buy 2 pairs per child. Compared to 2022, we see a nearly 50% decrease in families buying 3 or more pairs per child, likely due to economic conditions.
- Families are looking to spend less per pair. 12% more families plan to spend under $60 per pair of shoes compared to last year (53% versus 41%).
- 25% of families expect to spend less than $100 total on shoes for back to school compared to 20% in 2022.
- Inflation is still front of mind—families expect to spend more than they did last year on shoe purchases, as they face higher costs on a range of goods compared to years past.

Survey Questions and Results

Do you plan to use social media (Instagram, Facebook, etc.) to help research and assist in your back-to-school shopping?

- 52% of respondents plan to use social media to help research and assist in back-to-school shopping, while 48% do not.
- Younger parents using social media: 66% of respondents ages 18–34 are planning to use it to help in their back-to-school shopping, while 51% of parents ages 35–49 and 35% of respondents 50 or older plan to use it.
- Male users more likely than females: 56% of male respondents said they were planning on using social media for help with back-to-school shopping, with females were evenly split between using and not using it.
- It is interesting to note that compared to 2022, shoppers plan to use less social media to inform purchase decisions. It could be a result of greater budget strains that reduce exploration.



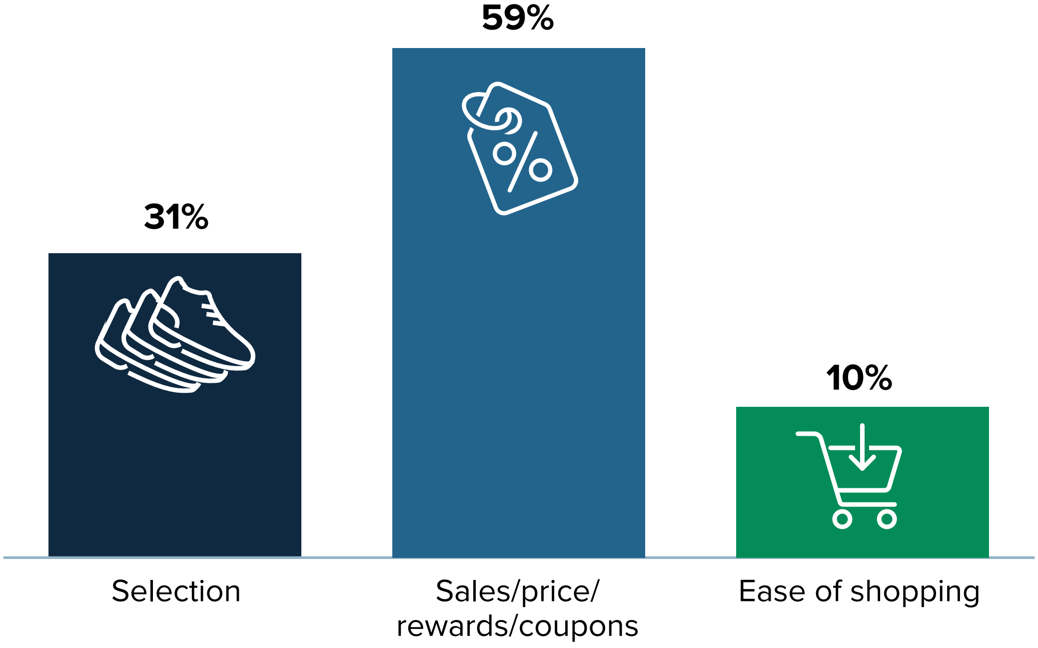
Survey Questions and Results

Where do you expect to purchase shoes for your child?

- 73% of respondents expect to purchase shoes in-store, 27% plan to purchase online.
- As spending on back-to-school shopping increases, parents appear more likely to shop online. Only 18% of parents expect to spend up to $100 total on shoes online, while 41% of those spending more than $300 will buy online.
- Wealthier households are more likely to purchase shoes online. 76% making under $25,000 in income, 81% with total income between $25,000 and $75,000, 69% making between $75,000 and $150,000, and 65% making more than $150,000 plan to purchase in-store.

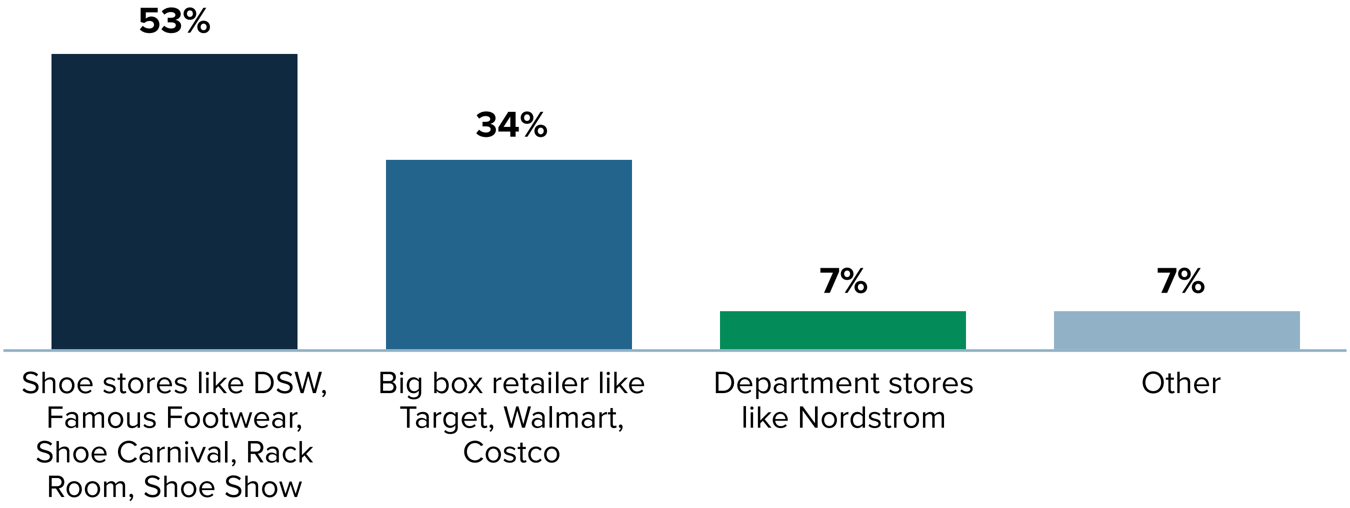
What influences your purchase decision most when you shop in-store?

- When shopping in-store, 56% of back-to-school shoppers are most influenced by sales/price of shoes, 31% by a good selection mix, 10% by ease of shopping, and 3% by rewards and coupons.
- Sales/price of shoes has a similar influence on male (56%) and female (57%) back-to-school shoppers.
- As total household income increases, the influence of sales/price of shoes decreases. 73% of respondents with total household income under $25,000, 61% of those making $25,000 – $75,000, 53% of those making $75,000 – $150,000, and only 34% of those making more than $150,000 said sales/price was the influential when shopping in-store.



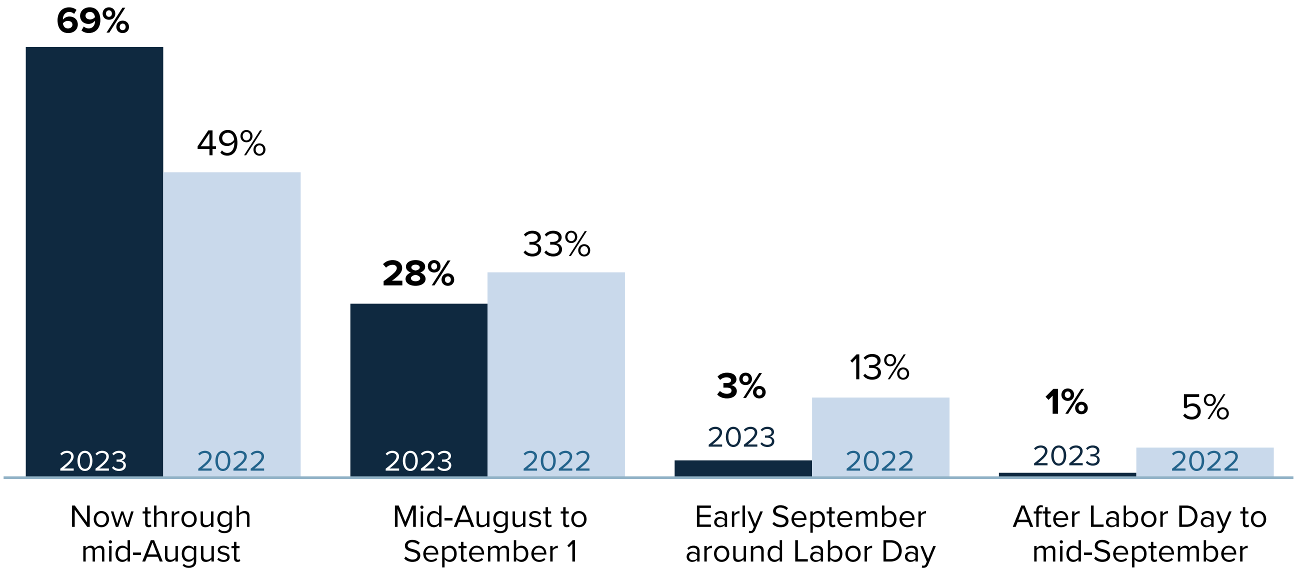
Which type of in-store location do you plan to shop for shoes – either ordered online for pickup, or in-store

- 53% plan on shopping at local stores like DSW, Famous Footwear, Shoe Carnival, Rack Room, or others. 34% plan on shopping at big box retailers like Target, Walmart, or Costco, 7% department stores, and 7% somewhere else.
- Shopping at local stores increases with age: 48% of shoppers ages 18–34, 54% of those ages 35-49, 56% of those ages 50–64, and 100% of those 65 and older plan on local shoe store shopping.
- Shopping at local stores varies with region: most popular is the South and Midwest, with 56% in each region planning to go to local stores, 50% in the Northeast, and 47% in the West, where big-box retailers are preferred.



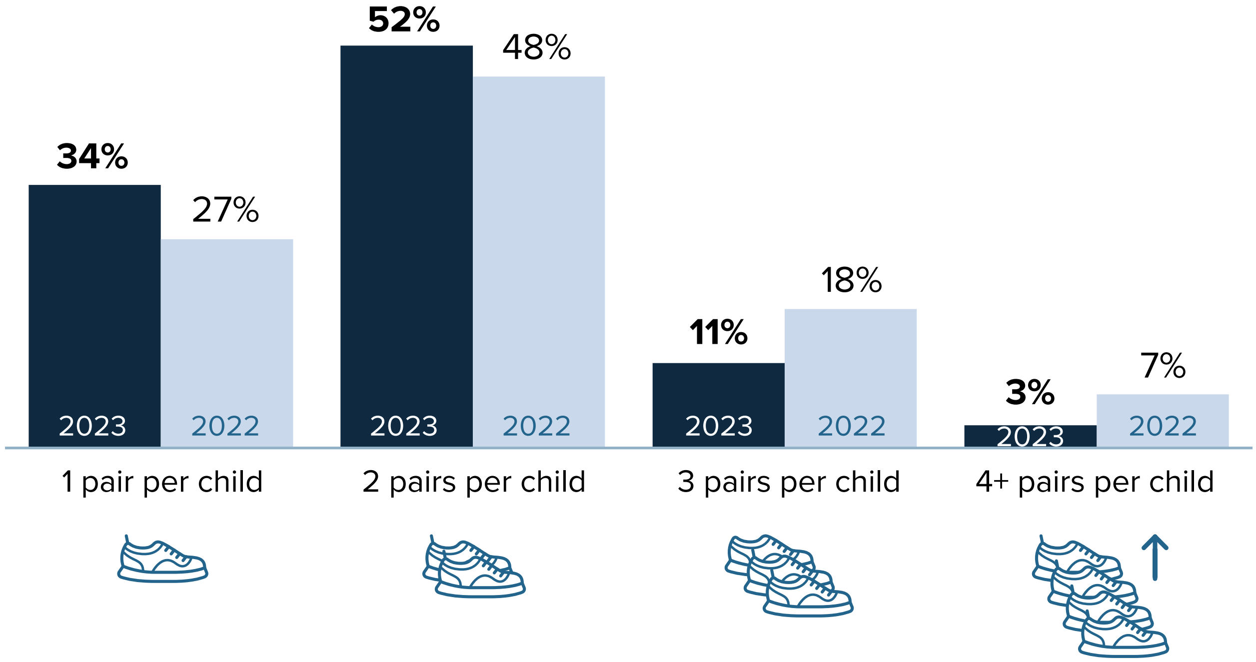
When do you plan to buy shoes for back-to-school?

- 69% of respondents plan to buy shoes for back-to-school beginning now through mid-August, 28% from mid-August to September 1, 3% in early September, and 1% after Labor Day to mid September.
- The Northeast (at 50%) is more likely to purchase shoes from mid August to September 1st. 31% of respondents in the Midwest plan to purchase shoes from mid August to September, followed by 21% in the West and 19% in the South.
- 73% of female and 64% of male respondents plan to purchase shoes for back-to-school now through mid August. 31% of male and 25% of femail back-to-school shoppers plan for mid-August to September shopping.



Kids have a range of sports and other activities in addition to the classroom. How many pairs of shoes PER CHILD (total household) do you expect to buy for back-to-school?

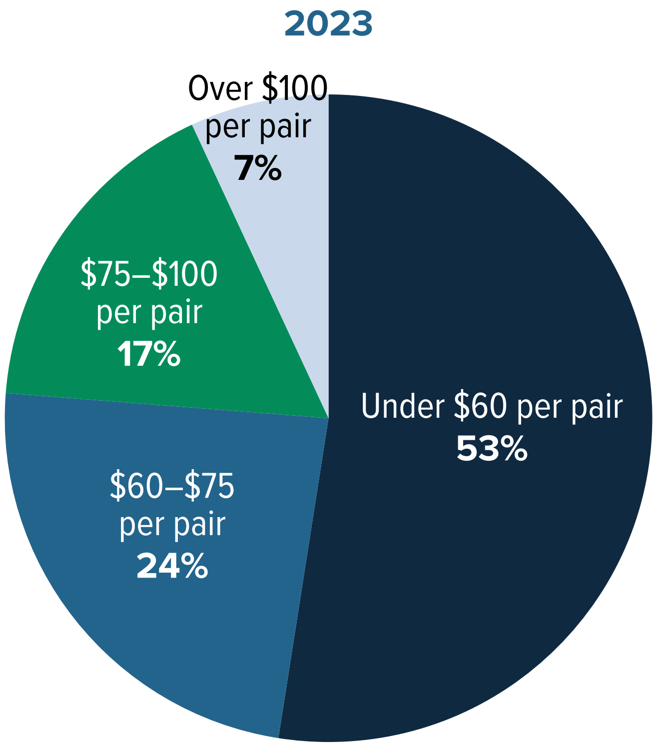
- 52% of back-to-school shoppers expect to purchase 2 pairs of shoes per child for activities ranging from classroom to sport. 34% expect to purchase 1 pair per child, 11% 3 pairs, and 3% expect to purchase 4 or more pairs per child.
- A little over half of those with household income less than $25,000 up to $74,999 expect to purchase 2 pairs of shoes per child. 14% of those with a total household income of $75,000 to $149,999 expect to purchase 3 pairs per child, and 4% with household income above $150,000 plan to purchase 4 or more pairs of shoes per child.
- The number of shoes back-to-school shoppers expect to purchase per child varies with age. A majority expect to purchase 2 pairs per child: 46% of 18–34 year olds, 54% of 35–49 year olds, and 55% of 50–64 year olds. 60% of older back-to-school shoppers expect to purchase 2 pairs of shoes per child, the most of any age group.
- Families' budget constraints could be why they are buying less pairs than in 2022.

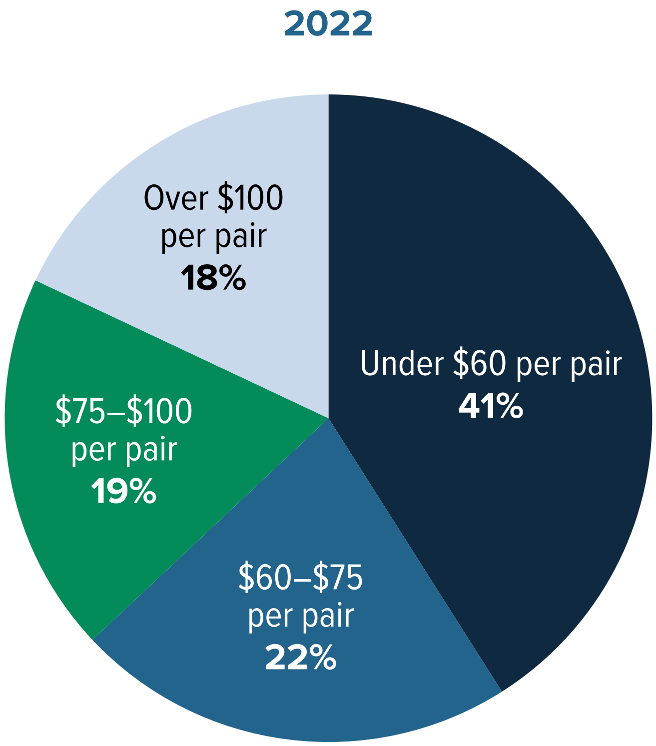


Survey Questions and Results

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

- 30% of respondents plan to spend $41–$60 per pair of shoes. 23% plan to spend $40 or less per pair of shoes, 24% plan to spend between $61–$75 per pair, 17% plan to spend between $76–$100 per pair, and 7% plan to spend over $100 per pair of shoes.
- The price range respondents expect to shop for varies by race. 43% of Asian Americans plan on spending $40 or less per pair, 33% of white respondents plan to spend $41–$60 per pair and 36% of Black respondents plan to spend $61–$75, however Black respondents are also most likely to spend over $100 per pair of shoes at 14%.

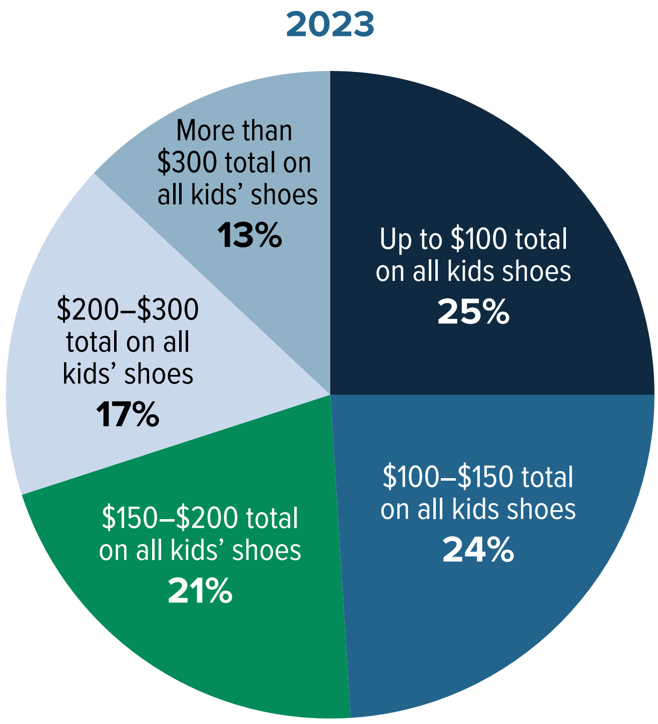


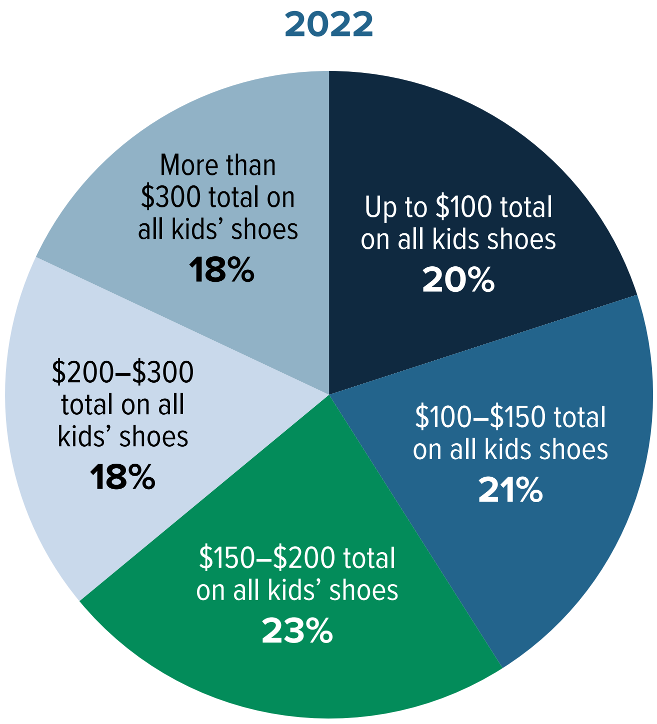


Survey Questions and Results

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

- 25% of respondents plan to spend up to $100 total on all kids shoes this back-to-school season, 24% between $100–150, 21% between $150–200, 17% between $200–300, and 13% plan to spend more than $300 total on all kids shoes.
- More than half (52%) of Asian American or Pacific Islander back-to-school shoppers plan to spend up to $100 total on all kids shoes. Hispanic respondents (20%) are most likely to spend more than $300 total, 18% of other/multiple race, 18% of Black respondents, 14% of Asian respondents, and 11% of white respondents.
- 43% of respondents making less than $25,000 and 29% of those making $25,000 – $75,000 plan to spend up to $100 on all kids shoes. 29% of $75,000 to $150,000 households expect to spend $100 – $150. 23% of households over $150,000 expect to spend more than $300 total on all kids shoes.

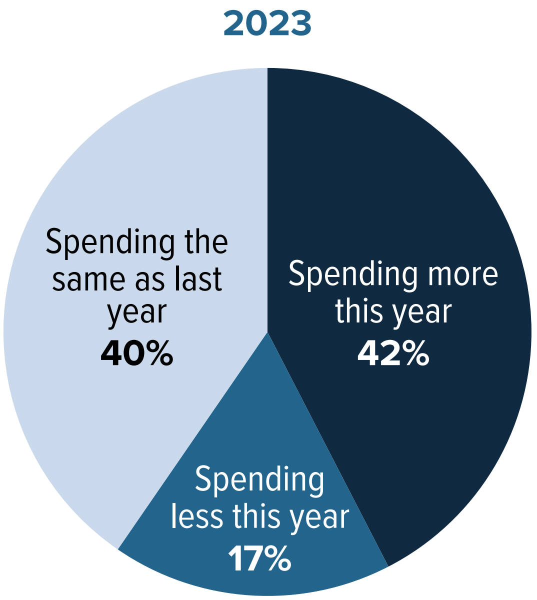


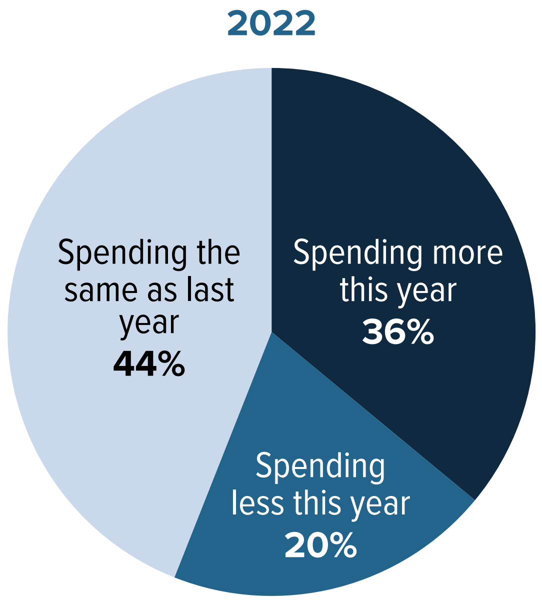


Survey Questions and Results

Are you planning to spend more on back-to-school shoes this year than last year?

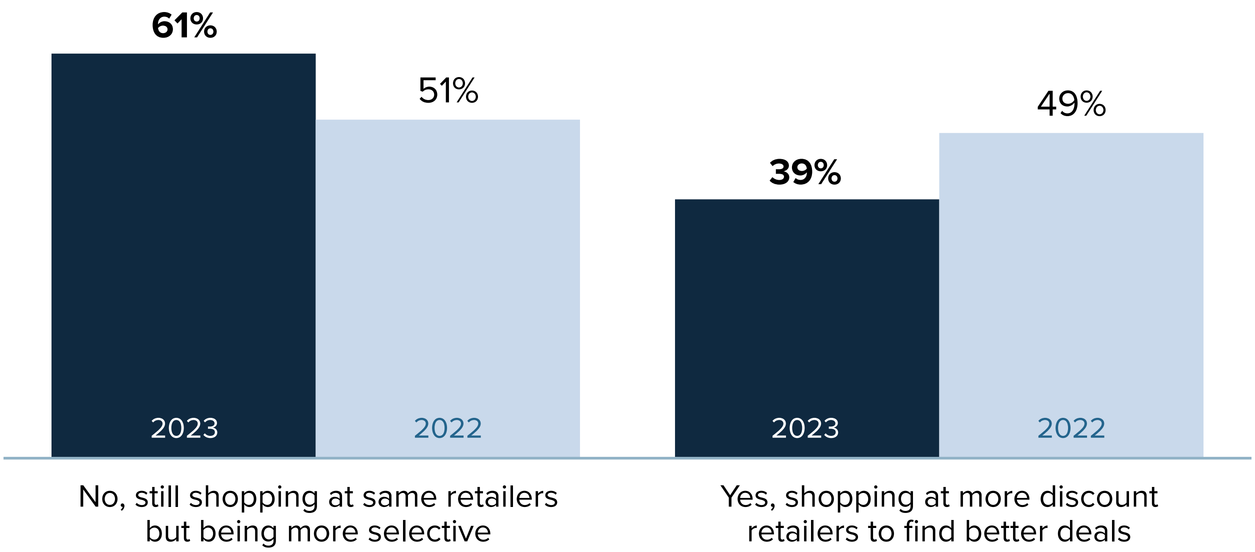
- 42% of back-to-school shoppers are planning on spending more money on shoes this year than last year; 40% plan on spending the same amount, and only 17% say they plan to spend less this year.
- 46% of Southern respondents expect to spend more this year than last year. In the West, 43%, in the Northeast, 41%, and at 37%, the Midwest is least likely to spend more this year.
- 51% of Hispanic respondents, 42% of white respondents, 41% of Black respondents, and 31% of Asian American respondents anticipated spending more this year than last year, on back-to-school shoe shopping, with 38% expecting to spend the same amount as last year.





Is your budget causing you to change where you are shopping this year?

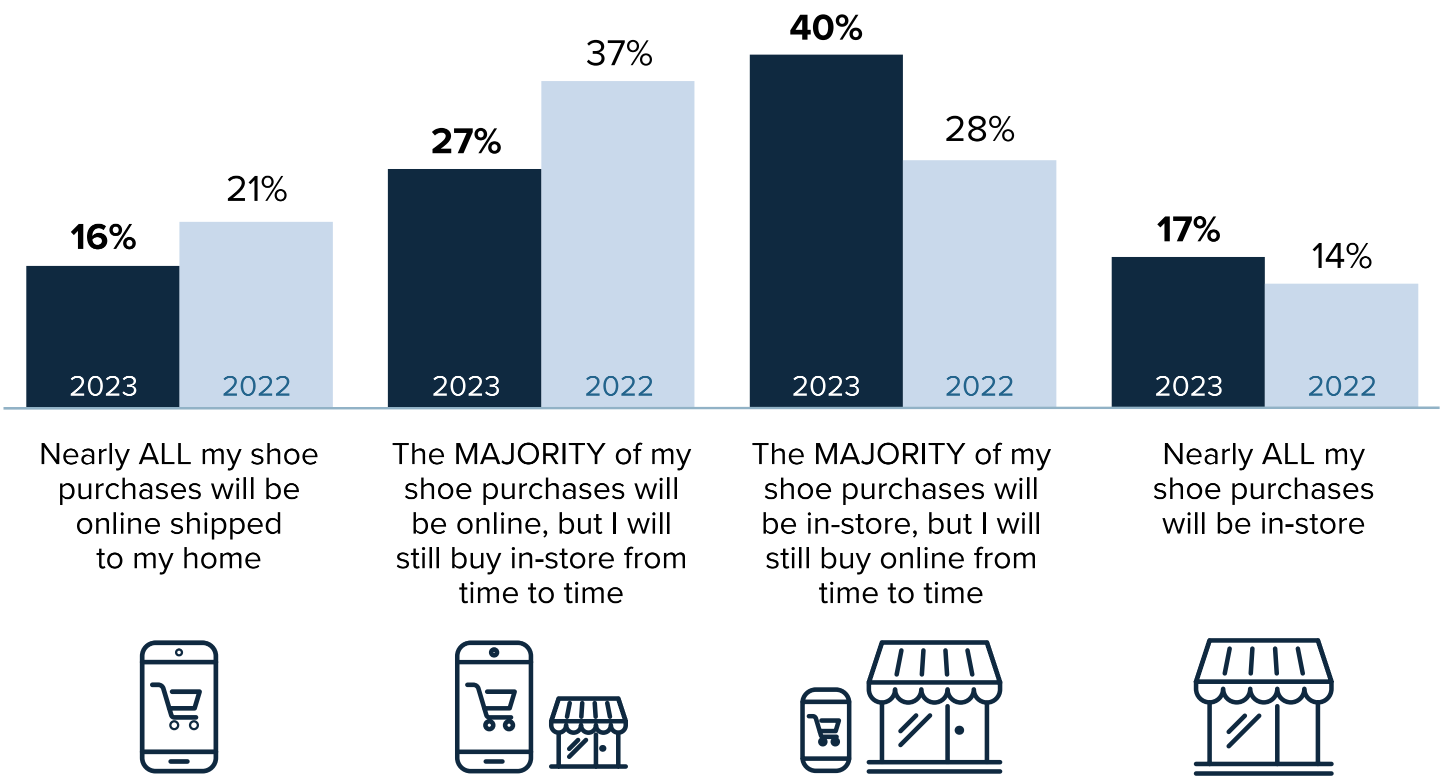
- Budget will not determine where most (61%) back-to-school shoe shoppers shop this year, yet they may be more selective. 39% will shop more at places like discount retailers to find better deals to fit their budget.
- 42% of back-to-school shoppers aged 18–34 are likely to shop at discount retailers due to budget constraints. Meanwhile, 64% of the 50–64 age group will continue shopping at the same retailers.
- 42% of men and 36% of women plan to shop at discount retailers.
- 65% of respondents with some college education are less influenced by budget constraints when deciding where to shop, while 42% those with a high school diploma or less are more likely to be affected by budget limitations.



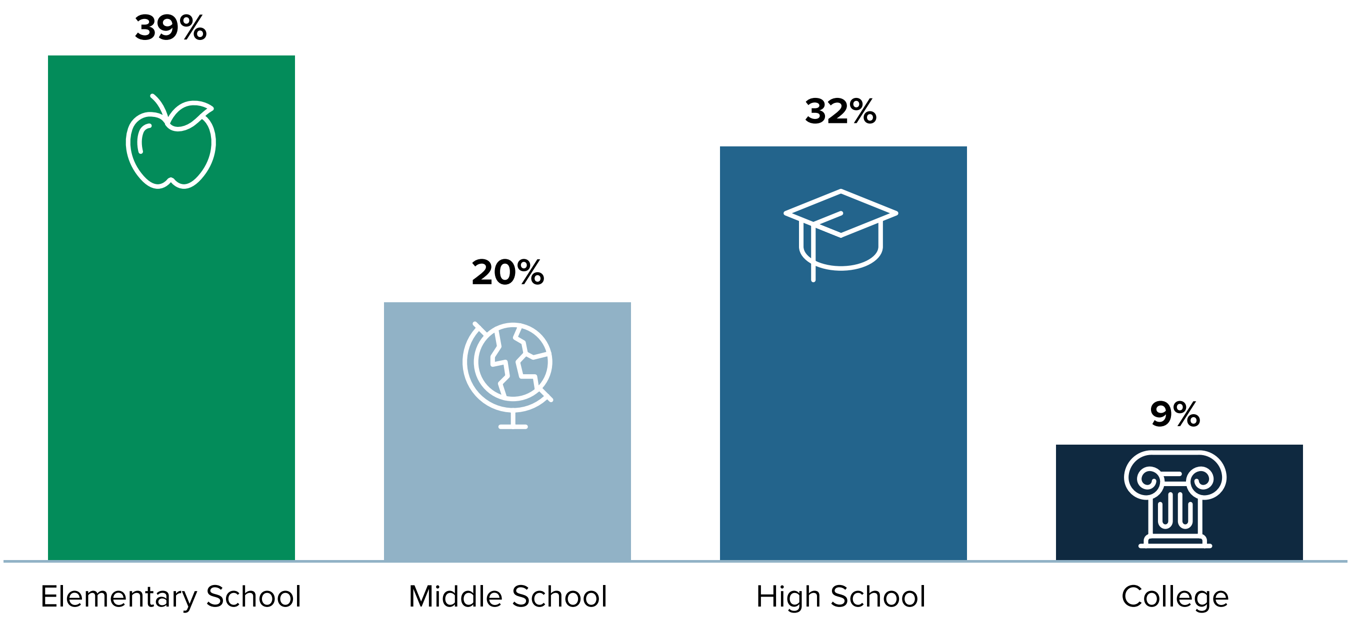
Survey Questions and Results

Beyond this back-to-school season, what best describes how you see yourself shopping for your family's shoes going forward?

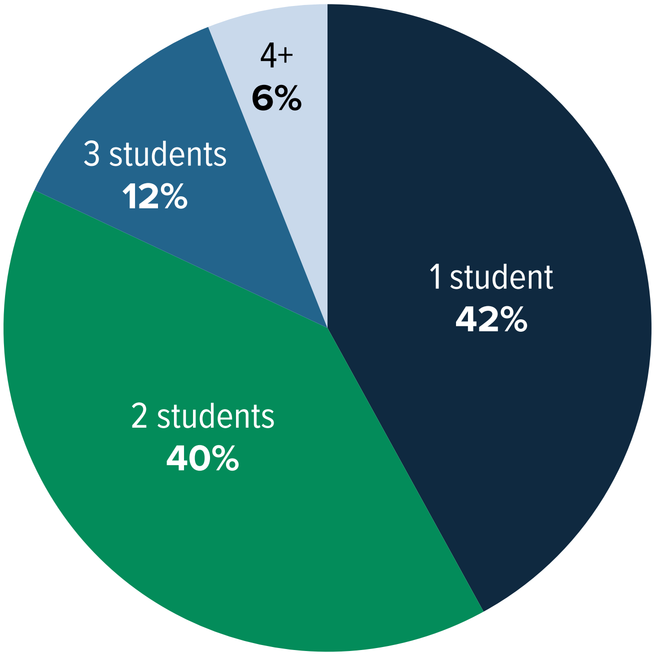
- 40% of respondents say that beyond back-to-school shopping, they will make most of their shoe purchases in-store, and online occasionally. 27% say the majority of their purchases will be online, and will shop locally from time to time. 17% say all future purchases will be made in local stores, and 16% will shop exclusively online.
- Black respondents are most likely to use online shopping and delivery for shoe shopping beyond the back-to-school season, with 52% of respondents saying that nearly all or a majority of their future purchases will be online.
- 60% of Asian American respondents are least likely to shop online after back-to-school season, as they prefer to do the majority of their shoe shopping in-store.
- 56% of Hispanic respondents seem to prefer in-store shopping for the majority of their shoe shopping moving forward from the back-to-school shopping season.
- White respondents also seem to prefer in-store shopping for the majority of their future purchases (58%).
- 58% of female respondents see themselves making nearly all (16%) or a majority (41%) of their purchases in-store. 56% of male respondents see themselves making nearly all (18%) or a majority (38%) of their purchases in-store.



What level of school is your oldest student?



How many students are you shopping for in your household this year?



Demographics

Which one of these racial or ethnic groups do you identify with?	
Hispanic or Latino of any race	11%
White or Caucasian	69%
Black or African American	13%
Asian American or Pacific Islander	5%
Other or multiple races	3%
Age	
18–34 years	24%
35–50 years	62%
50–64 years	13%
65 years or older	1%
Highest level of education attained	
High school or less	24%
Vocational/technical school	6%
Associate degree/some college	25%
College graduate	30%
Postgraduate or higher	16%
Gender	
Male	45%
Female	55%
Other/Non-binary	.4%
Which of the following ranges includes your annual household's income?	
Less than $25,000	11%
$25,000 to $75,000	35%
$75,000 to $150,000	42%
Over $150,000	12%
In what region of the country do you reside?	
Midwest	22%
Northeast	19%
South	39%
West	21%