

FDRA | FFANY

2025 Holiday Shoe Sales Forecast

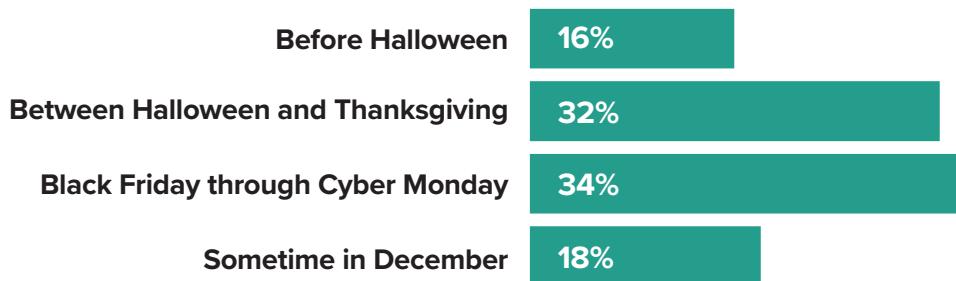
Nationwide survey of footwear consumer purchasing habits this holiday season



Survey Highlights

- 34% expect to make holiday footwear purchases Black Friday through Cyber Monday, 32% expect to purchase between Halloween and Thanksgiving.
- 75% of shoppers expect footwear prices to rise over next several months.
- 43% of in-store shoppers plan to shop at a shoe store chain, 34% plan to shop at mass retail stores, 13% at a department store, and 10% at a discount store.

When do you expect to make your holiday footwear purchases?



This survey was commissioned by

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

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Representing over 97% 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 serves the entire footwear industry, from small family owned footwear businesses to global footwear companies, as well as domestic manufacturers, 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

ECP Emerson College
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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information on the
footwear industry?

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of stats, data and analysis and
subscribe to Shoe-in Show to
hear industry leaders discuss
business insights and trends!

METHODOLOGY

Emerson College Polling is pleased to present The Footwear Distributors & Retailers of America with the findings from a survey of likely shoe shoppers in the United States.

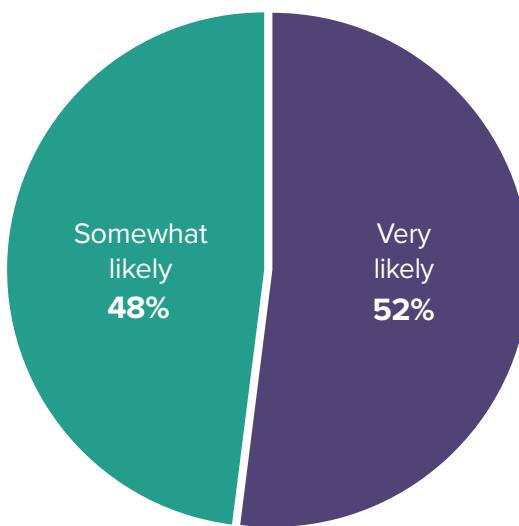
Methodology

Respondents interviewed in this study are part of a sample of n=1,000 likely shoe shoppers. Data was weighted by U.S. general population parameters. The margin of error for the sample is +/- 3% in 19 of 20 cases. The survey was administered via the probability-based Consensus panel of US residents, with additional panelists provided by CINT. Data was collected between September 16-18, 2025.

It is important to remember that subsets based on demographics, such as gender, age, education, and race/ethnicity, carry with them higher credibility intervals, as the sample size is reduced. Survey results should be understood within the poll's range of scores, and with a confidence interval of 95% a poll will fall outside the range of scores 1 in 20 times.

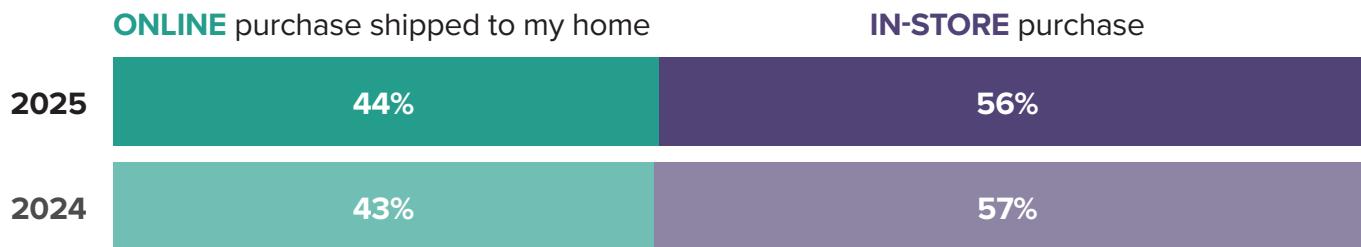
The results presented in this report include univariate and bivariate analysis of the data. Frequency distributions for each item included on the questionnaire are shown in the tables. In all cases, cross-tabulation results are also shown.

How likely are you to purchase new shoes for yourself or as gifts this holiday season?



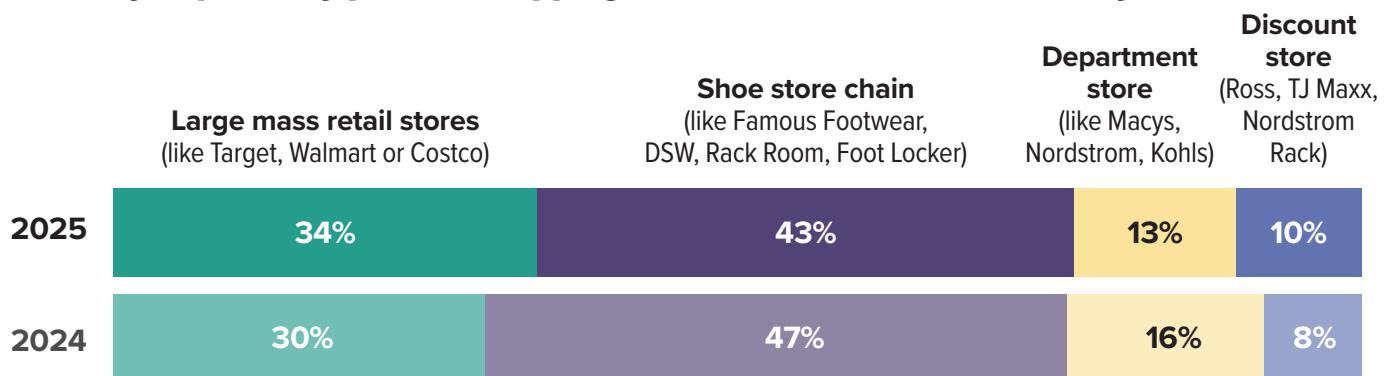
SURVEY QUESTIONS AND RESULTS

Do you plan on making your holiday shoe purchase online or from a store?



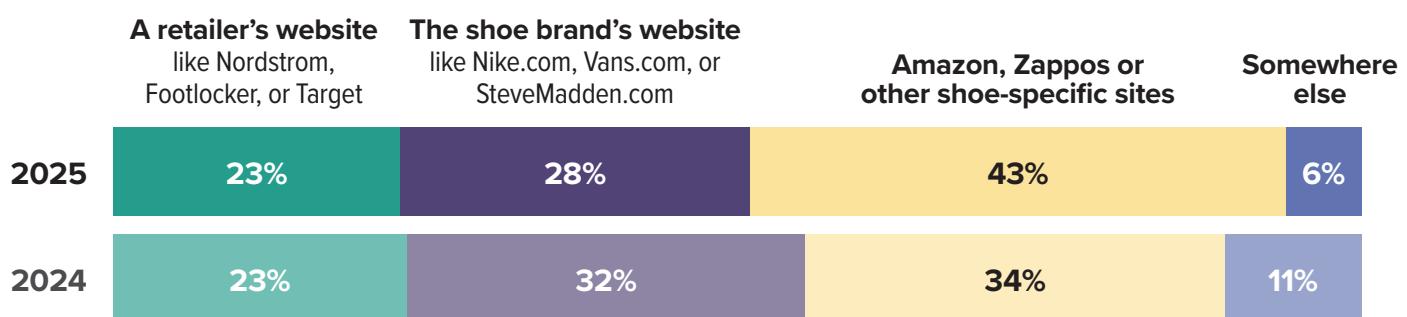
56% of respondents plan on making their footwear purchase from a store, while 44% plan to make an online purchase shipped directly to their home.

Where do you primarily plan on shopping for shoes IN-STORE this holiday season?



Of those planning to shop for shoes in-store, 43% plan to shop from a shoe store chain (Famous Footwear, DSW, Rack Room, Foot Locker), 34% plan to shop via large mass retail stores (like Target, Walmart or Costco), 13% from a department store, and 10% plan to shop from a discount store (Ross, TJ Maxx, Nordstrom Rack).

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



Of those planning to shop online, 39% plan to buy from Amazon, 28% from the shoe brand's website, 23% from a retailer's website (like Nordstrom, Footlocker, or Target), 4% from Zappos or other shoe-specific sites, and 7% from somewhere else.

SURVEY QUESTIONS AND RESULTS

Are you primarily shopping for branded footwear, or for the best value this holiday season?



A majority of shoppers (61%) are primarily purchasing shoes by known brands, while 39% are looking for the best shoes at the right price, regardless of brand name. Compared to last year, those planning to shop based on brand increased from 59% to 61%.

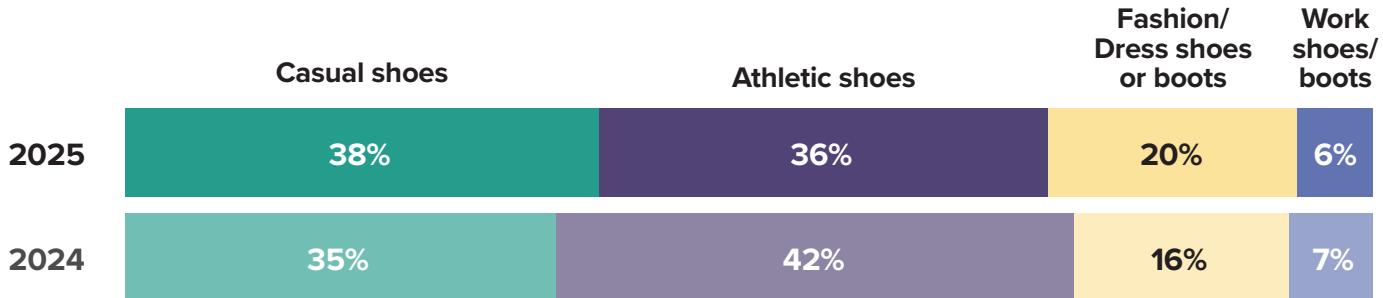
- Younger individuals are most likely to shop for shoes by known brands at 70%, decreasing gradually with age to 52% of those over 65. Last year, a majority of those over 65 (59%) said they planned to shop based on value; now 48% say the same.

Which type of promotion would most likely drive you to make an actual purchase this holiday season?



Percent-off offers (26%) and dollar-off offers (26%) are the top promotions shoppers say would drive them to make an actual purchase, 22% BOGO offers, 16% free shipping, and 10% say no promotion would drive them.

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



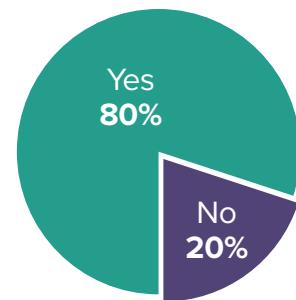
Regarding which type of shoes shoppers plan to purchase this holiday season, 38% plan to purchase casual shoes, 36% athletic, 20% fashion/dress shoes or boots, and 6% work boots.

- Plans to purchase casual shoes increased by 3 points from 2024, athletic shoes dropped by 6 points, and dress shoes increased by 3 points; work shoes stayed almost the same, from 6% in 2024 to 7% in 2025.

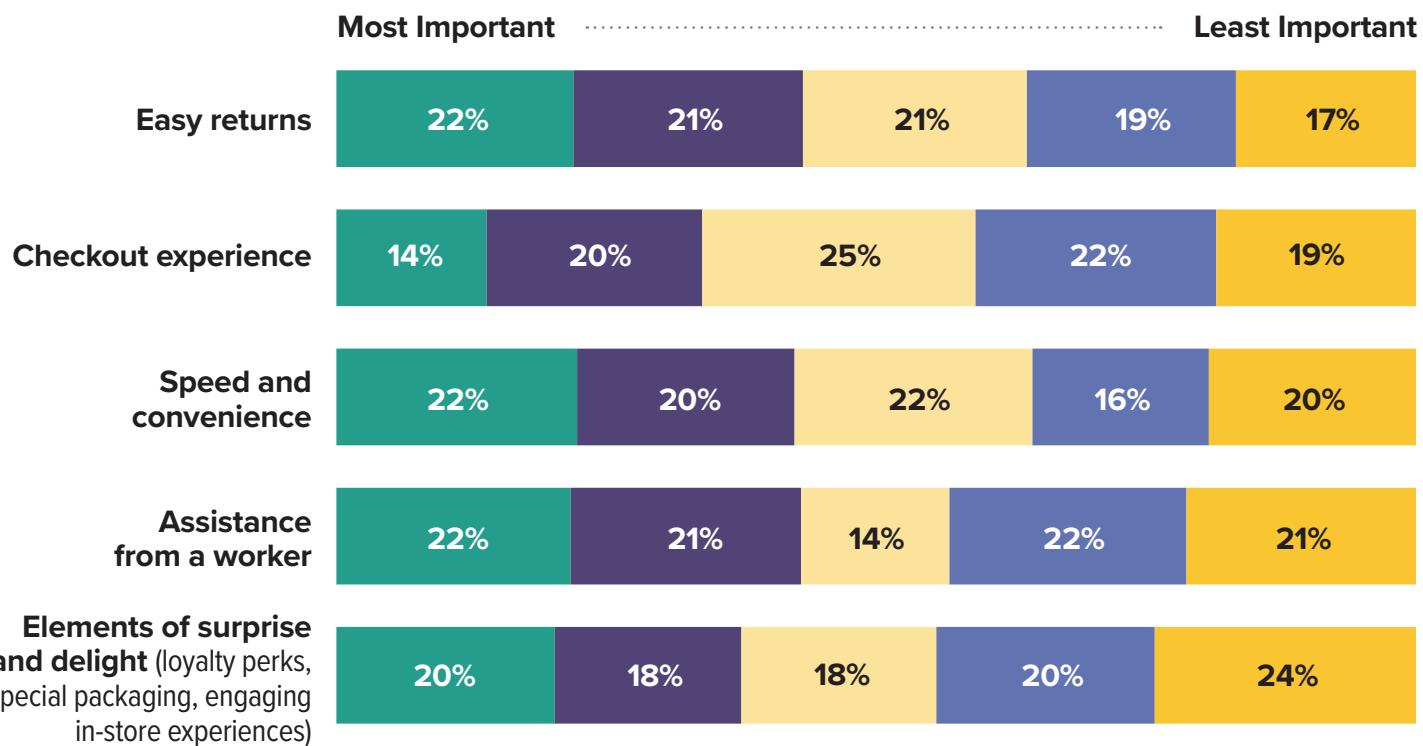
SURVEY QUESTIONS AND RESULTS

Would you be open to purchasing types of footwear you don't usually buy if the price or promotions were favorable?

A majority (80%) would be open to purchasing footwear categories they don't usually buy if the price or promotions were favorable, while 20% would not be.



When buying a shoe for yourself or as a gift, please rank the following factors in order of importance.

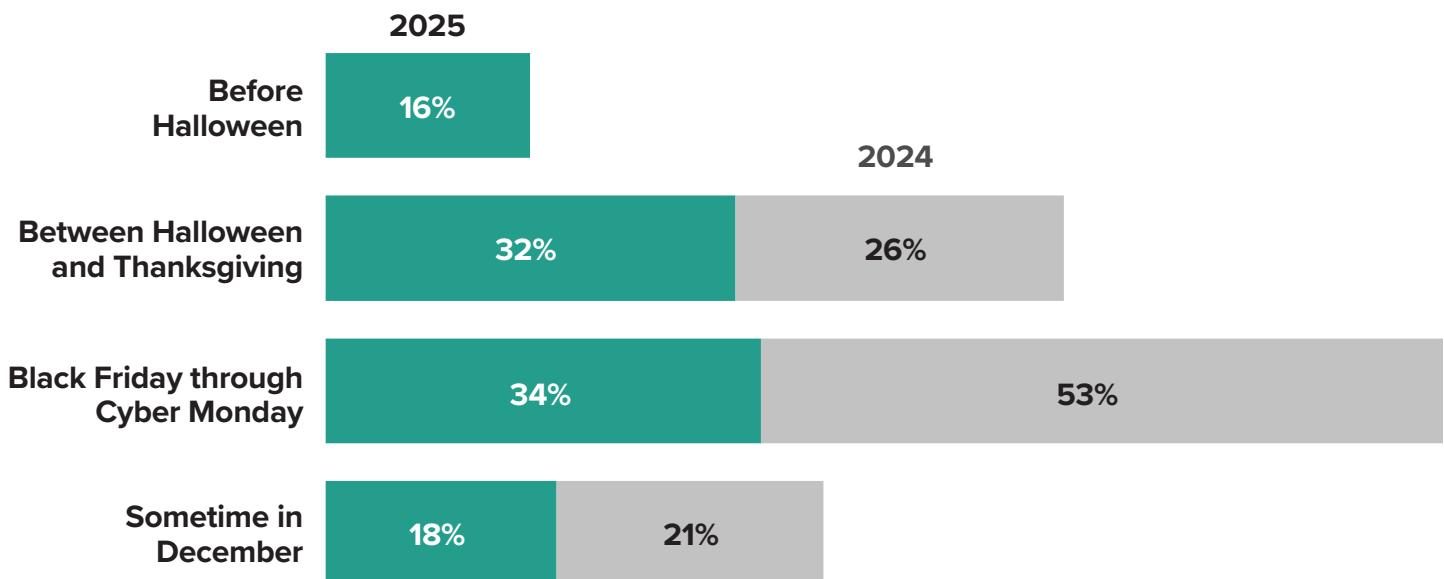


Respondents were asked to rank the following factors when buying shoes for themselves or as a gift in order of importance: easy returns, checkout experience, speed and convenience, assistance from employees (in person or online), and elements of surprise and delight (loyalty perks, special packaging, engaging in-store experiences).

- The number of people who ranked "speed and convenience" as the most important factor dropped three points since 2024, from 25% to 22%.

SURVEY QUESTIONS AND RESULTS

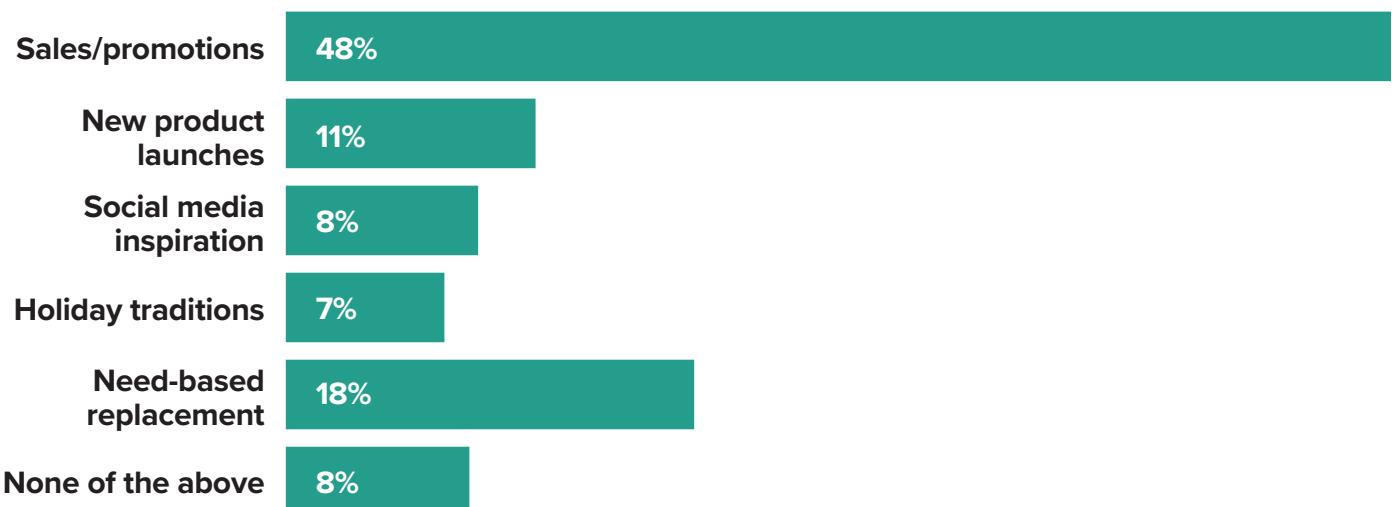
When do you expect to make your holiday footwear purchases?



Just over a third of respondents (34%) expect to make their holiday footwear purchases during Black Friday through Cyber Monday, 32% expect to purchase between Halloween and Thanksgiving, 18% sometime in December, and 16% before Halloween.

- Time of purchase varied by gender: 39% of women plan to shop on Black Friday weekend compared to 28% of men, while 23% of men plan to shop before Halloween, compared to 10% of women.

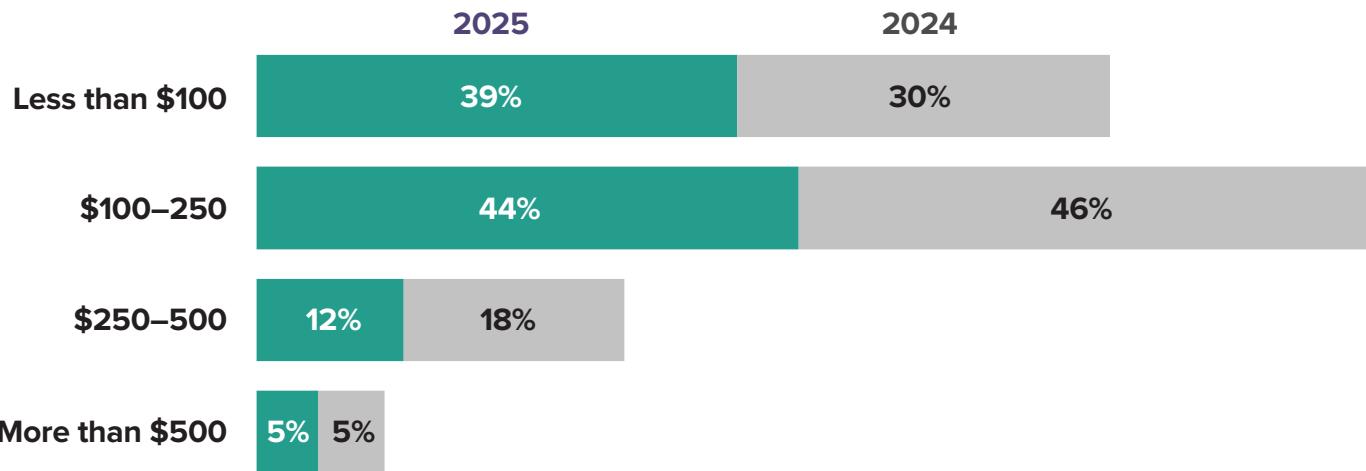
What factors most influence when you buy?



Respondents were asked what factors most influence when they buy shoes for the holiday season: 48% said sales/promotions, 18% need-based replacements, 11% new product launches, 8% social media inspiration, and 7% holiday traditions.

SURVEY QUESTIONS AND RESULTS

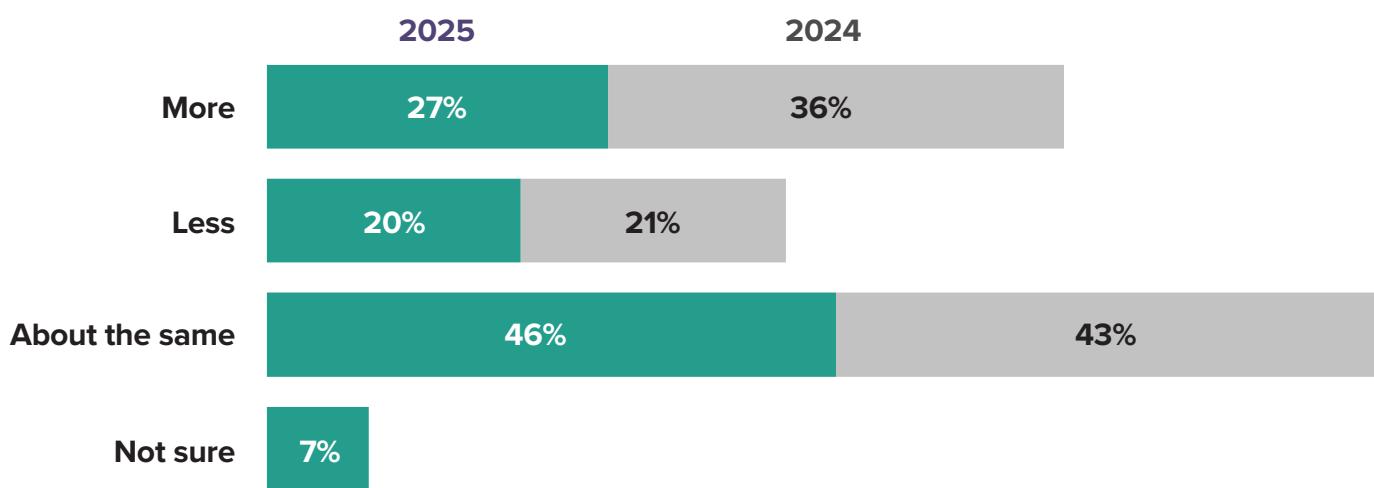
What is the total amount of money you plan on spending on footwear purchases this holiday season?



44% of respondents plan to spend between \$100–\$250 on footwear purchases this holiday season, 39% plan to spend less than \$100, 12% between \$250–\$500, and 5% plan to spend more than \$500.

- The number of people who plan to spend under \$100 on shoes this holiday season increased by 9 points, from 30% in 2024 to 39% in 2025.

Compared to last holiday season, do you expect to spend on footwear:

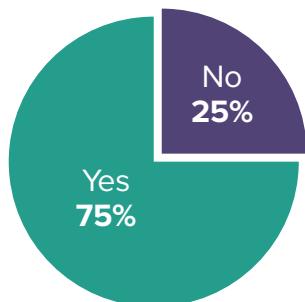


Compared to last holiday season, 46% expect to spend about the same amount as last year, while 27% expect to spend more, and 20% expect to spend less.

- In 2024: 43% expected to spend about the same, 36% more, and 21% less.

SURVEY QUESTIONS AND RESULTS

Have you noticed an increase in footwear prices over the past year?



3 in 4 (75%) respondents have noticed an increase in footwear prices in the past year, while 25% have not.

Have increased costs of footwear changed how you shop for shoes?



Respondents were asked if increased costs of footwear have changed how they shop for shoes: 49% are buying fewer pairs, 19% are shifting to value brands, 14% are delaying their purchases, while 18% have not changed how they shop.

- People with a household income between \$50–75k are most likely to report shifting to value brands at 27%.

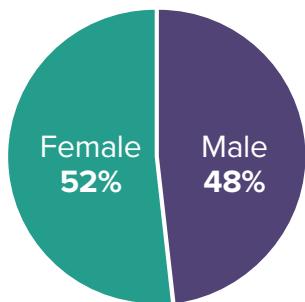
Do you expect footwear prices to rise over the next several months?



29% expect footwear prices to rise “a lot” over the next several months, 46% expect footwear prices to rise “a little,” and 9% do not expect prices to rise. 15% are unsure.

DEMOGRAPHICS

Gender



Age



Educational Level



Total House Income Level



Region



Ethnic Background or Ancestry

