FDRA

FOOTWEAR DISTRIBUTORS AND RETAILERS OF AMERICA

2016 Holiday Sales Survey

A nation-wide survey of footwear sales online during the 2016 holiday season

This survey was commissioned by

FDRA

FOOTWEAR DISTRIBUTORS AND RETAILERS OF AMERICA

The footwear industry's business and trade association

At over 80% 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 130 companies and over 200 brands designing, producing, and selling great footwear to consumers all over the globe.

This survey was conducted by

ECP

EMERSON COLLEGE POLLING

The Emerson College Polling Society (ECPS) is a research center at Emerson College in Boston, Massachusetts whose focus is on economics, politics, sports, and entertainment public opinion . ECPS surveys and polls are internationally recognized and in 2016 Bloomberg News ranked ECPS as the most accurate collegiate pollster for the Presidential Primaries. Over the last year, ECPS surveys and polls outperformed CNN, Fox News, WSJ, and PPP in terms of overall accuracy. ECPS is a charter member of the Transparency Initiative of the American Association of Public Opinion Research (AAPOR).

Questions about this survey should be directed to info@fdra.org

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Executive Summary

To better understand drivers and behaviors of online shoe shoppers this holiday season, a sales channel of growing importance, FDRA commissioned this timely poll.

The survey was administered capturing landline, cellphone, and online responses via Survey Sampling International SSI and was conducted between November 15-18, 2016.

A screening question was used to gauge if respondents intended to shop for footwear online. Twenty-two percent (22%) qualified of the 4,050 that were asked the question.

People's pocketbooks and wallets appear to be the driving force behind their online shopping. The most important factor for purchasing footwear online was cost, cited by 41% of respondents. The next three most important factors were brand/fashion (22%), adding variety to their current styles (18%), and the actual need for footwear (15%).

Footwear consumers do not appear to be purchasing online to stay out of the holiday shopping crowds. The main reason respondents said they were shopping online were for better prices (33%), the ability to compare prices (32%), and the larger selection (24%). Only 9% said they were specifically shopping online to stay away from crowded stores.

A majority of shoppers (51%) are looking to spend under $100 for their online footwear purchase and an additional 38% are planning to spend upward of $250. Just 4% of respondents said they were planning to spend over $500 this year.

36% of respondents said they were going to spend more on shoes this holiday season than in 2015. 33% said they were planning to spend less this holiday season and 30% said they were going to spend the same; forecasting similar holiday sales numbers seen in 2015.

Minorities are planning on spending more than Caucasians as 19% of Hispanics, 18% of African American, and 13% of Asians said they will spend more than $250, while only 5% of Caucasian plan to spend over $250.

A majority of Asians plan to spend more this holiday season than last year (50% to 18%) while Hispanics plan to spend less (42% to 21%).

'Athleisure' shoes are again a big winner this holiday season. 28% of respondents said they would be purchasing casual or retro sneakers. Fashion and dress shoe purchases were close behind at 24%, gym or performance shoes were at 19%, 13% said they planned on purchasing fashion boots while 8% said they would be purchasing work boots.

Men are more likely to purchase casual/retro sneakers (36% to 21%). Women are more likely to purchase fashion boots (20% to 5%), while men are more likely to purchase work boots (13% to 4%).

40% of respondents are planning to make their online shoe purchase between Black Friday and November 30th. It appears shoppers are not expecting any big last minute online specials with just 15% waiting to shop online in the last 10 days (shipping times may obviously be a factor).

Men are nearly twice as likely as women to wait until the last minute to make their shoe purchases (20% to 11%).

Shoppers are using laptops (40%) and desktops (33%) for their online footwear shopping while 16% are using their smart phone and 12% are using a tablet or iPad. We believe this means footwear shoppers are more intensely searching for deals instead of perhaps more passively shopping on their smart phone.

Amazon is the most popular site to shop for shoes online with 44% of respondents citing the website as their most-often online shopping destination. Seven percent said they will likely buy on specific online shoe retailer websites like Zappos or Shoebuy.com – meaning more than 50% of sales this holiday season will be made on online retailers' websites.

Moreover, 22% of respondents said they would be purchasing on a "brick-and-click" retailer's website like Nordstrom, Foot Locker, or Target. Brand Loyalty is not dead as 16% of respondents said they plan to purchase directly from a shoe brand's website.

Amazon is most popular with Asians (70%) while Hispanics prefer a "brick-and-click" retailer's site (36%).

Overall, people are predominantly shopping for themselves online (60%) and for their kids (20%). Women are more likely to be shopping for the kids (27% to 12% for men) and men are more likely to be shopping for themselves at 70% to 53% for women. Readers can draw their own conclusions from this interesting finding.

The online shopper is more likely to be female (57% to 43% male).

The online shopper is more likely to be younger - with 54% under the age of 40.

The online shopper is more likely to educated as 57% hold a bachelor degree or more.

The racial composition of the online shopper is predominately Caucasian at 44%, with 20% Asian, 13% African-American and 12% Hispanic.

Survey Questions and Results

How likely are you to purchase new shoes ONLINE for either yourself or someone else this holiday season?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Likely	483	60.4	60.4	60.4
	Somewhat Likely	317	39.6	39.6	100.0
	Total	800	100.0	100.0	

Who are you purchasing shoes for online this holiday season?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yourself	480	60.1	60.1	60.1
	Spouse/SO	72	8.9	8.9	69.0
	Kids	163	20.4	20.4	89.4
	Parents	49	6.1	6.1	95.5
	Friends	36	4.5	4.5	100.0
	Total	800	100.0	100.0	

What is the main reason why you are buying shoes online?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Larger Variety	189	23.6	23.6	23.6
	Better Prices	262	32.8	32.8	56.4
	Easier to Compare	259	32.3	32.3	88.7
	No Crowds	71	8.9	8.9	97.6
	Something Else	19	2.4	2.4	100.0
	Total	800	100.0	100.0	

Where do you most often shop for shoes online?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Amazon	353	44.2	44.2	44.2
	Brand Sites	126	15.8	15.8	59.9
	Retailer Sites	180	22.4	22.4	82.4
	Online Sale Sites	54	6.7	6.7	89.1
	Somewhere Else	87	10.9	10.9	100.0
	Total	800	100.0	100.0	

What is the most important factor when purchasing shoes online this holiday season?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Cost	329	41.1	41.1	41.1
	Adding Variety to Current Styles	143	17.8	17.8	59.0
	Brand/Fashion Styles	174	21.8	21.8	80.7
	Need	122	15.2	15.2	95.9
	Something Else	32	4.1	4.1	100.0
	Total	800	100.0	100.0	

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

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Gym or Performance	154	19.2	19.2	19.2
	Casual or Retro Sneakers	220	27.5	27.5	46.8
	Fashion/Dress Shoes	188	23.5	23.5	70.3
	Fashion Boots	106	13.2	13.2	83.5
	Winter/ Snow Boots	39	4.9	4.9	88.4
	Work Boots	61	7.7	7.7	96.1
	Something Else	31	3.9	3.9	100.0
	Total	800	100.0	100.0	

When do you expect to make your online holiday shoe purchases?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Already Purchased	145	18.1	18.1	18.1
	Black Friday through November	315	39.3	39.3	57.4
	Dec 1-14	220	27.5	27.5	84.9
	Dec 15-25	121	15.1	15.1	100.0
	Total	800	100.0	100.0	

Do you plan on spending more or less money this holiday season compared to last year for shoes?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	More Money	291	36.3	36.3	36.3
	Less Money	266	33.3	33.3	69.6
	Same Amount	243	30.4	30.4	100.0
	Total	800	100.0	100.0	

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

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	< $100	411	51.4	51.4	51.4
	$100-$250	307	38.3	38.3	89.8
	$250-$500	51	6.4	6.4	96.2
	> $500	30	3.8	3.8	100.0
	Total	800	100.0	100.0	

What is your preferred device for browsing and purchasing footwear online?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Desktop	260	32.5	32.5	32.5
	Laptop	317	39.6	39.6	72.1
	Tablet/iPad	99	12.4	12.4	84.5
	Phone	124	15.5	15.5	100.0
	Total	800	100.0	100.0	

What is your gender?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Male	344	43.0	43.0	43.0
	Female	456	57.0	57.0	100.0
	Total	800	100.0	100.0	

What is your age category?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	18-29	220	27.5	27.5	27.5
	30-39	212	26.5	26.5	53.9
	40-49	111	13.9	13.9	67.8
	50-59	122	15.3	15.3	83.1
	60-69	90	11.2	11.2	94.3
	70+	46	5.7	5.7	100.0
	Total	800	100.0	100.0	

What is your educational level?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	< HS	25	3.1	3.1	3.1
	HS	97	12.1	12.1	15.2
	some college	220	27.5	27.5	42.7
	Bachelor	247	30.8	30.8	73.6
	Grad Degree	211	26.4	26.4	100.0
	Total	800	100.0	100.0	

For statistical purposes only, will you tell me your ethnic background or ancestry?

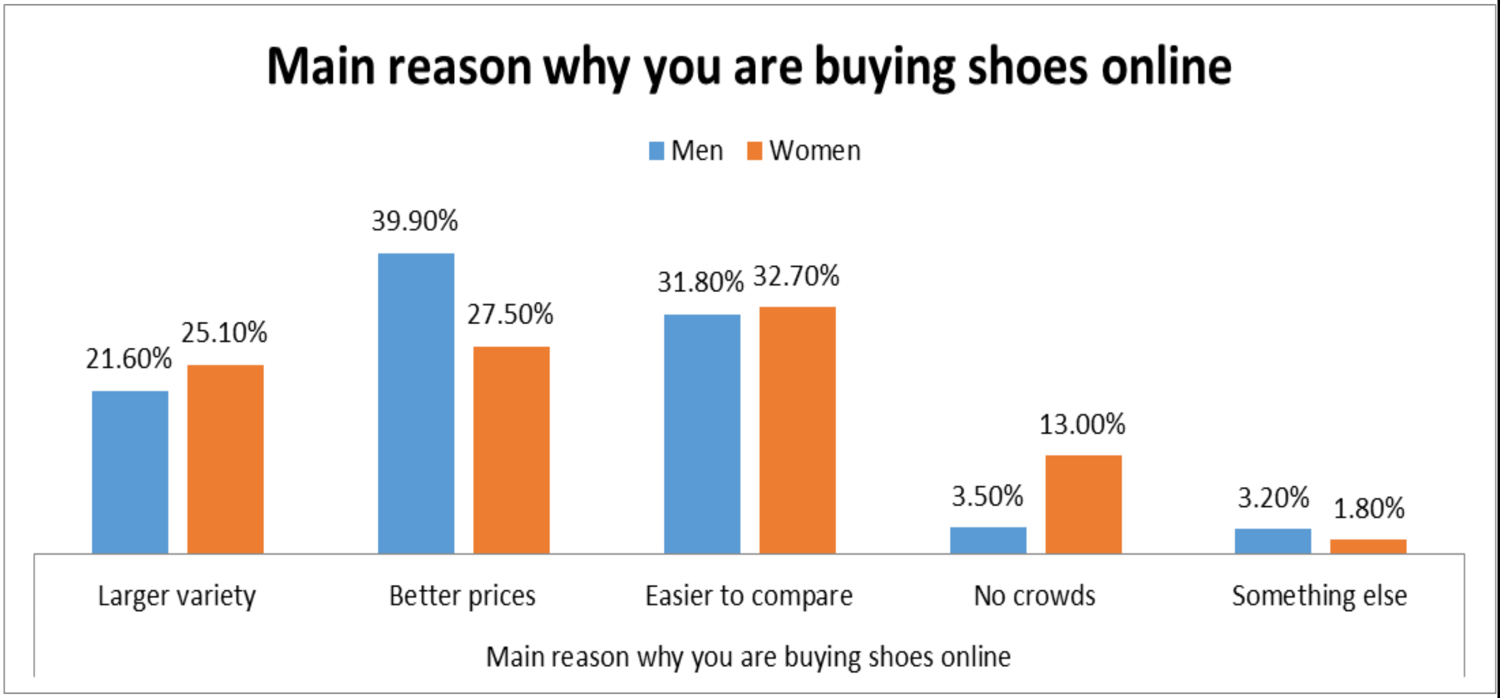
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	White	353	44.1	44.1	44.1
	Black	102	12.8	12.8	56.9
	American Indian	52	6.5	6.5	63.4
	Asian	158	19.7	19.7	83.1
	Native Hawaiian	3	.3	.3	83.4
	Hispanic	92	11.5	11.5	94.9
	Other	37	4.6	4.6	99.5
	Unsure	4	.5	.5	100.0
	Total	800	100.0	100.0	

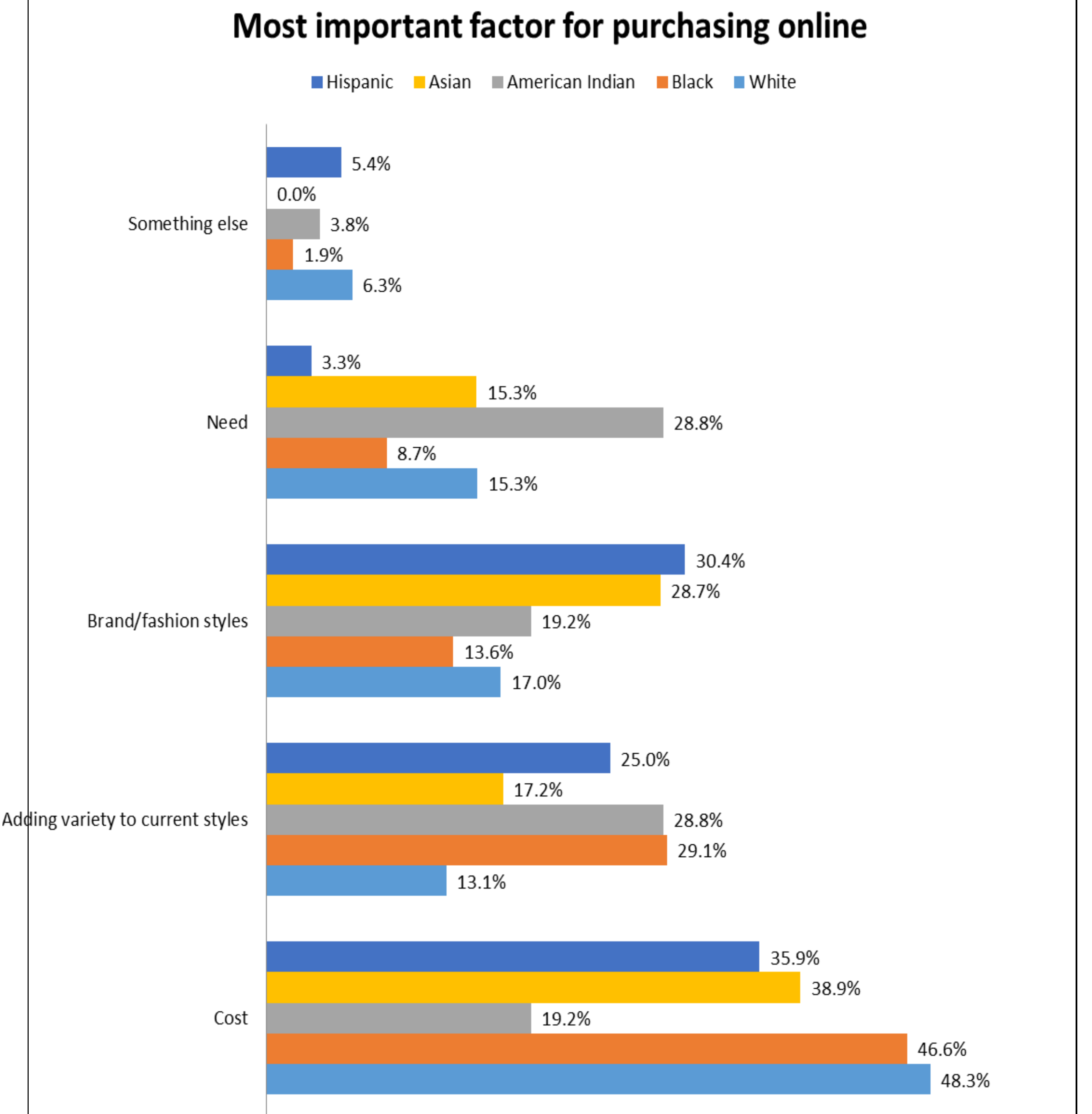
Region

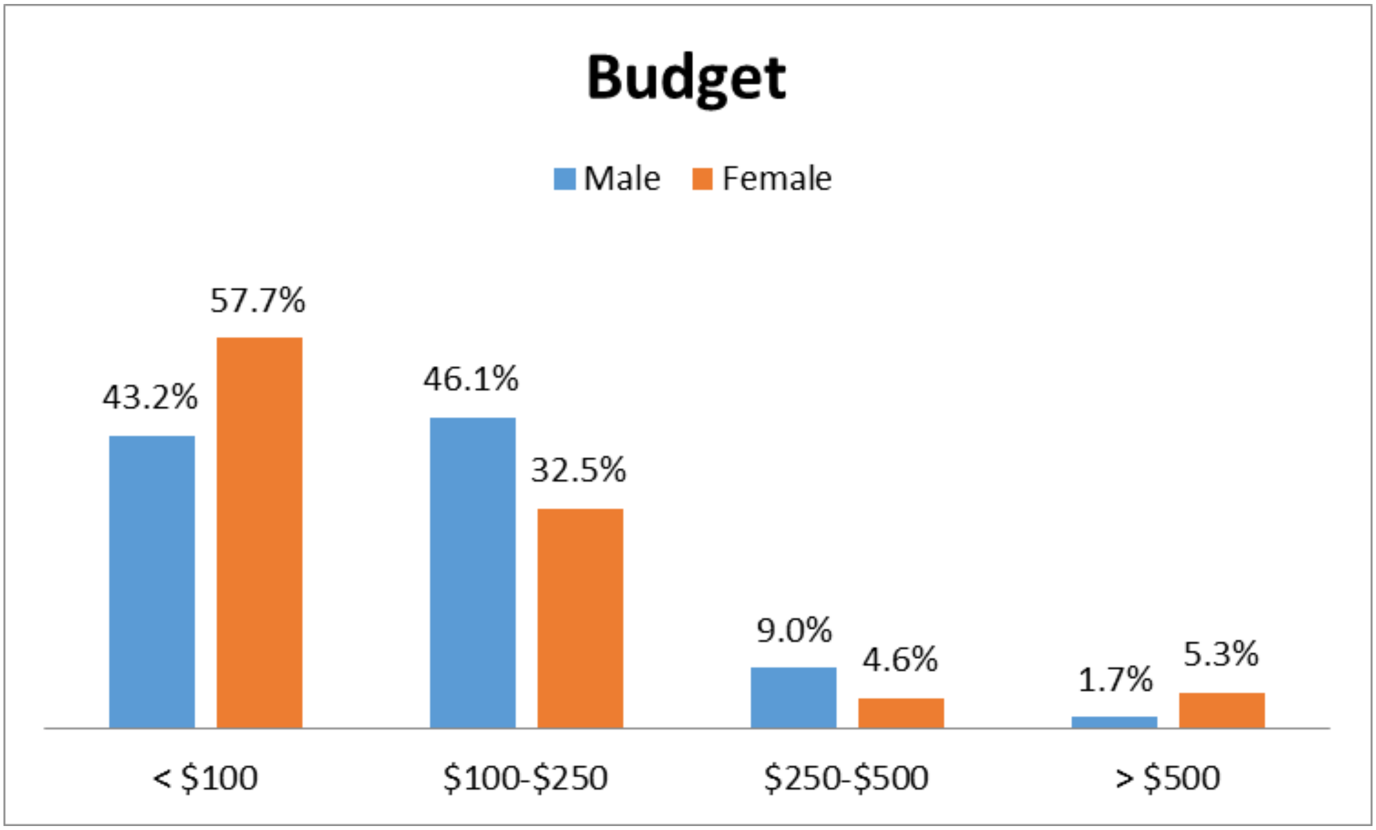
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	NE	144	18.0	18.0	18.0
	MW	160	20.0	20.0	38.0
	S	192	24.0	24.0	62.0
	W	304	38.0	38.0	100.0
	Total	800	100.0	100.0	

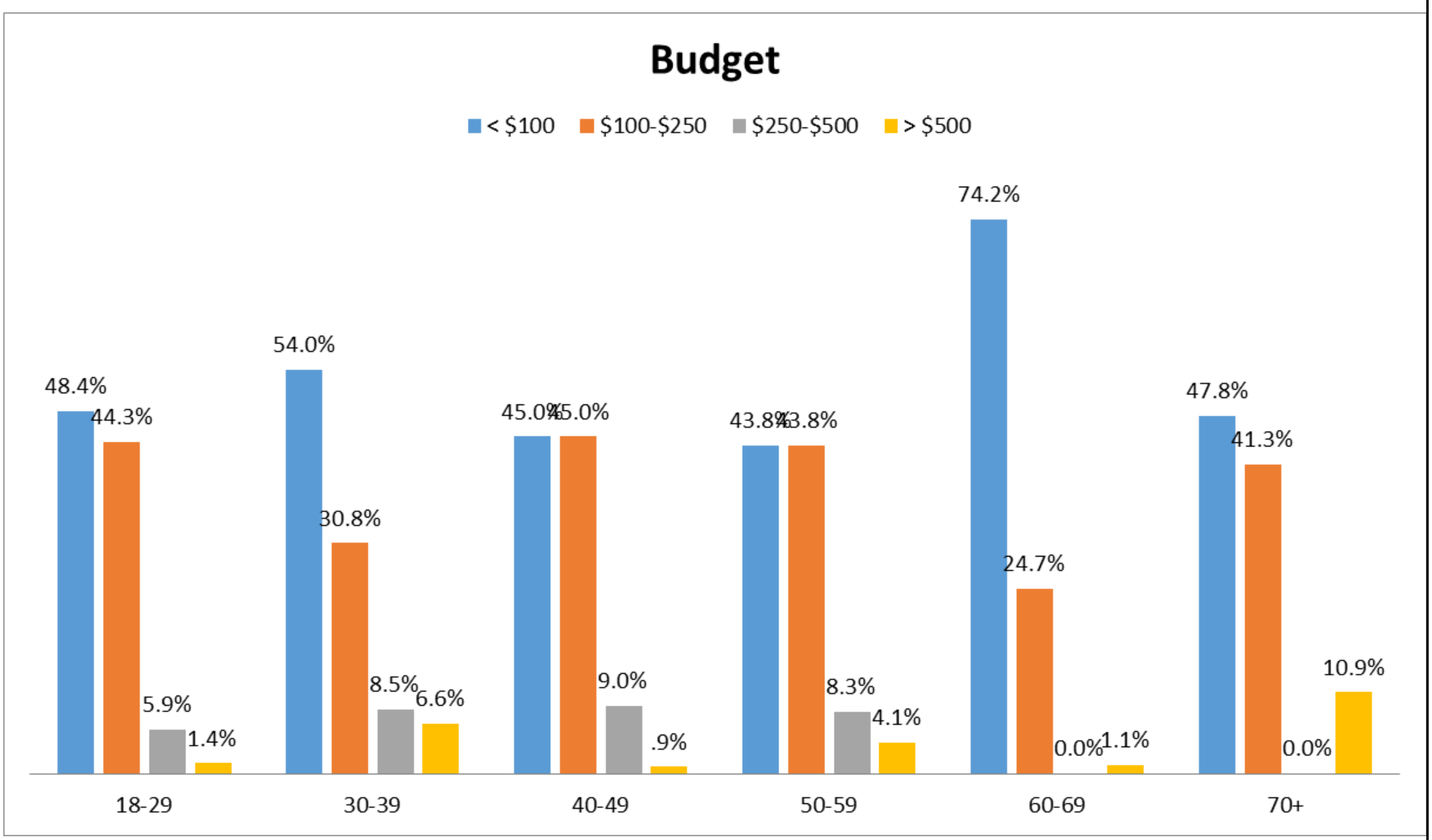
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Telephone	375	46.9	46.9	46.9
	Online	425	53.1	53.1	100.0
	Total	800	100.0	100.0	

Key Cross Tabs




Most important factor for purchasing online
Hispanic
Asian
American Indian
Black
White
Something else
5.4%
0.0%
3.8%
1.9%
6.3%
Need
3.3%
15.3%
28.8%
8.7%
15.3%
Brand/fashion styles
30.4%
28.7%
19.2%
13.6%
17.0%
Adding variety to current styles
25.0%
17.2%
28.8%
29.1%
13.1%
Cost
35.9%
38.9%
19.2%
46.6%
48.3%


Budget
Male
Female
57.7%
43.2%
46.1%
32.5%
9.0%
4.6%
1.7%
5.3%
< $100
$100-$250
$250-$500
> $500


Budget
< $100
$100-$250
$250-$500
> $500
48.4%
44.3%
5.9%
1.4%
54.0%
30.8%
8.5%
6.6%
45.0%
45.0%
9.0%
.9%
43.8%
43.8%
8.3%
4.1%
74.2%
24.7%
0.0%
1.1%
47.8%
41.3%
0.0%
10.9%
18-29
30-39
40-49
50-59
60-69
70+

Methodology

The Emerson College Polling Society, under the supervision of Professor Spencer Kimball is pleased to present Footwear Distributors and Retailers of America (FDRA) with the findings from a survey of likely holiday online footwear shoppers.

All respondents interviewed in this study were part of a fully representative sample using an area probabilistic sampling method of N= 800 (sample size). The margin of error for the sample is +/- 3.4% in 19 of 20 cases.

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 Parameters were gathered from the American Community Survey 2015 and controlled for through rim weighting for region.
https://www.census.gov/popclock/data_tables.php?component=growth

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the footwear industry's business and trade association

1319 F Street, NW, Suite 700
Washington, DC 20004
(p) 202.737-5660
info@fdra.org
www.fdra.org