



2019 Holiday Shoe Sales Survey

A nationwide survey of footwear consumers on their purchasing habits this holiday season



This survey was commissioned by



The footwear industry's business and trade association

At over 90% 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



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 holiday footwear shoppers. All respondents interviewed in this study were part of a fully representative sample using an area probabilistic sampling method of N=760 (sample size). The margin of error for the sample is +/- 3.5% in 19 of 20 cases. Data was weighted by US parameters.

An initial response of n=1,100 people entered the survey with n=340 (30%) 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 contacting landline telephones via IVR, cell phones via text message and online via a panel provided by Amazon MTurk, and was conducted between November 10–14, 2019.

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 either yourself or your family this holiday season? *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- Of the 760 surveyed that were likely to purchase shoes this holiday season, 65% said they were very likely, and 35% said they were somewhat likely.
- Those in the South region of the country are the most likely, with 74% of respondents reporting they are very likely to purchase new shoes this season. In the Northeast, only 53% are very likely, compared to 47% that are just somewhat likely. 61% of Midwestern shoppers and 64% of shoppers in the West are very likely.

Do you plan on purchasing your new shoes online or in a physical store? *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*

(National, November 10–14, 2019, MM, N=760, +/- 3.5%)

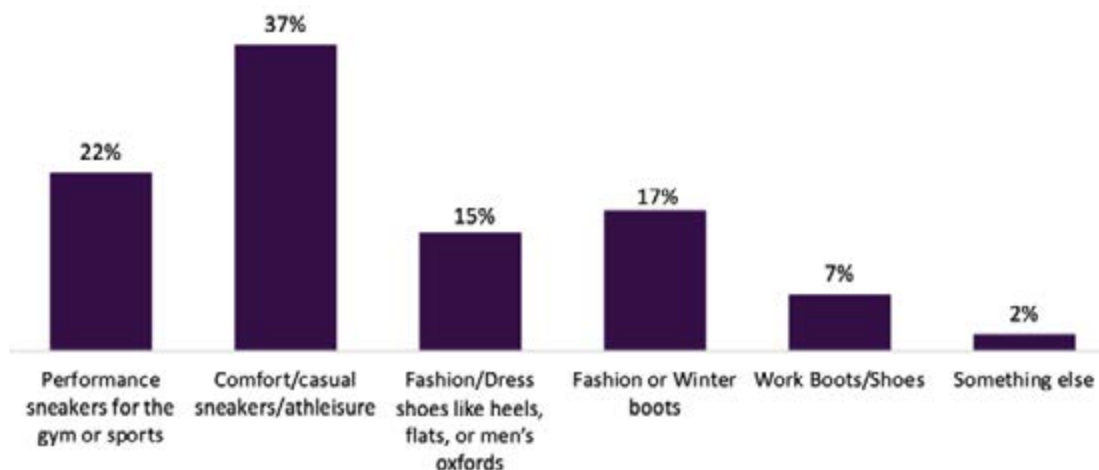


- Of those who are likely to purchase shoes this holiday season, 52% plan to purchase new shoes online and 48% plan to purchase them in store.
- Among those under 50, 61% are shopping online, and among those over 50, 58% are buying in-store.
- Men were slightly more likely (56%) to buy their shoes online, and a slight majority of women (52%) are planning on buying in-store.
- Shoppers in the South are most likely (58%) to buy their shoes online, followed by shoppers in the Midwest (51%).
- A majority of shoppers in the Northeast (53%) and West (52%) are shopping for shoes in-store.

Survey Questions and Results

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

(National, November 10–14, 2019, MM, N=760, +/- 3.5%)

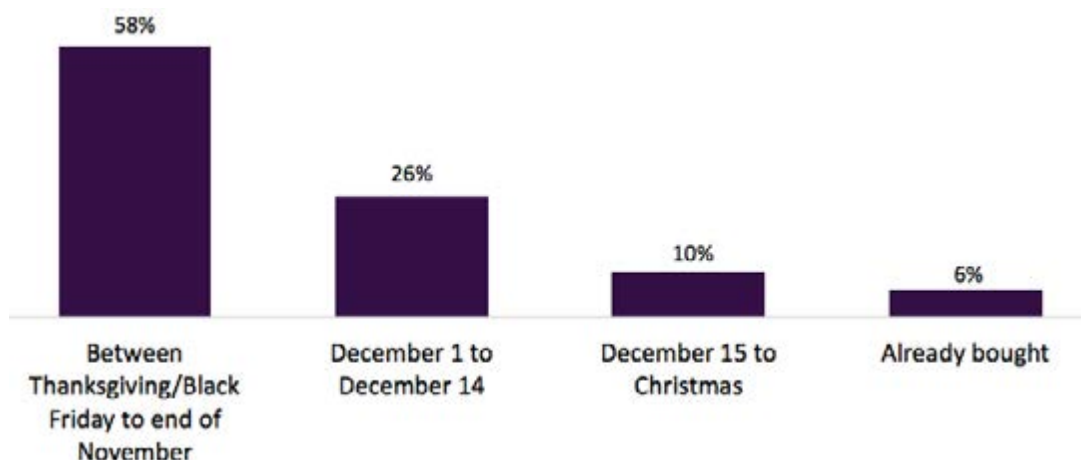


- When asked what type of shoes they were most likely to buy, the highest percentage (38%) of respondents indicated that they plan to buy casual/athleisure sneakers, followed by 22% who said performance sneakers. 17% said fashion or winter boots, 15% said fashion/dress shoes, 7% said work boots, and 2% of respondents said something else.
- For men, 46% plan to buy casual/athleisure sneakers, followed by performance sneakers (24%). Among women, 30% plan to buy casual/athleisure sneakers, followed by fashion or winter boots (24%), fashion/dress shoes (21%), and performance sneakers (20%).
- In the Midwest, shoppers are split between performance sneakers (28%) and casual/athleisure shoes (27%). In the West, the most popular option is casual/athleisure shoes (46%). Western shoppers are also buying casual/athleisure shoes at a higher rate (37%), as well as shoppers in the Northeast (32%).
- A plurality of every age group besides those aged 40-49 and those 70 and older plans to buy casual/athleisure sneakers. 37% of those aged 40-49 plan to buy performance sneakers, and 45% of those 70 and older plan to buy fashion/dress shoes.

Survey Questions and Results

When do you expect to make your holiday shoe purchases?

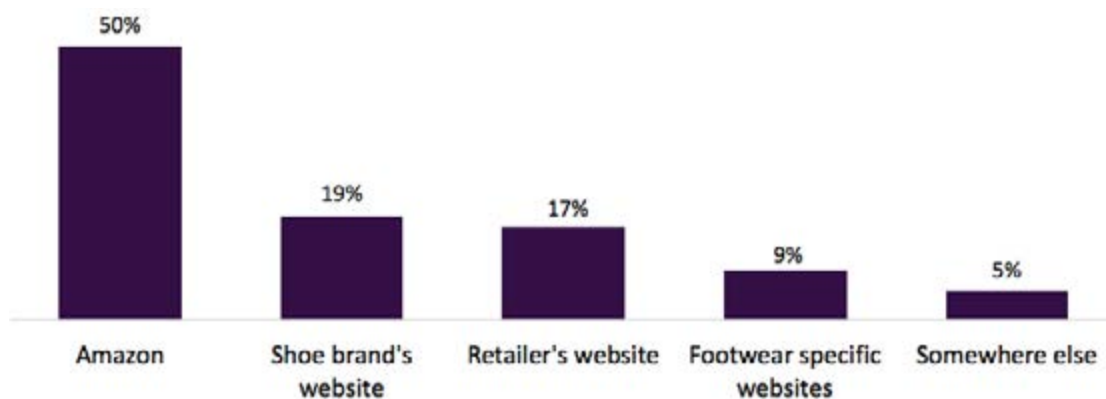
(National, November 10–14, 2019, MM, N=760, +/- 3.5%)



- 58% said they plan to make holiday shoe purchases between Thanksgiving/Black Friday until the end of November, 26% said the first two weeks of December, 10% said within 10 days of Christmas, and 6% said they already made their purchases.
- Men are more likely (14%) to be last minute shoppers purchasing between December 15th and Christmas than women (7%).
- A majority of shoppers in every region are planning on making their purchases around Black Friday, with a slightly higher percentage in the West (15%) planning on purchasing between December 15th and Christmas Day.

Where do you plan to shop for shoes online?

(National, November 10–14, 2019, MM, N=394, +/- 4.9%)

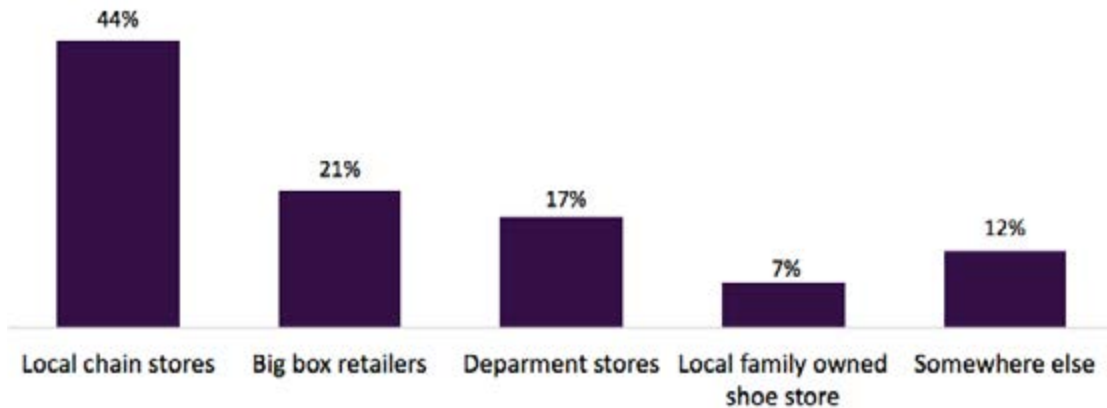


- Among online platforms, 50% of respondents said they plan to shop for shoes on Amazon, 19% said the shoe brand's website, 17% said a retail website, 9% said footwear specific online sites such as Zappos.
- A majority of White shoppers (58%) are using Amazon for their online shoe purchases, followed by the shoe brand's website (16%) and a retailer's website (13%).
- Black shoppers are split between Amazon (39%), the shoe brand's website (25%) and a retailer's website (25%).
- Hispanic shoppers are split between buying off Amazon (32%), a retailer's website (29%), the shoe brand's website (18%), and footwear specific online sites such as Zappos or Shoes.com (18%).
- Asian shoppers are split between buying directly off the brand's website (46%) and Amazon (45%).

Survey Questions and Results

Which type of in-store location do you plan to shop for shoes?

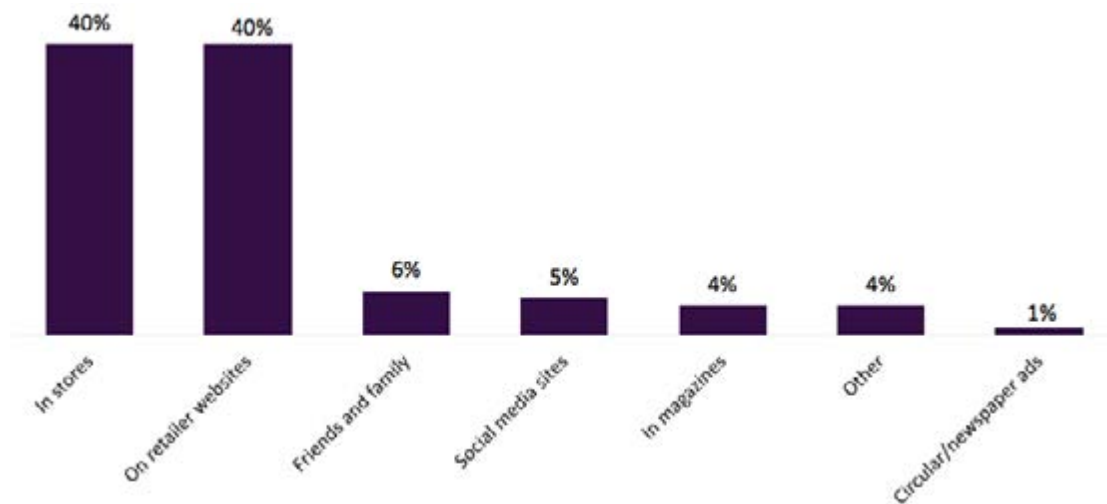
(National, November 10–14, 2019, MM, N=366, +/- 5.1%)



- Among in-store options, 44% plan to shop at local chain stores like DSW or Outlet stores, 21% said a big box retailers like Target or Walmart, 17% said a department store like Nordstrom or Macy's, 12% said somewhere else, and 7% said a local family owned shoe store.
- In the Midwest, shoppers are split between shopping at big box retailers (24%) and local chain stores (24%). A plurality in both the Northeast (43%) and South (41%) said local chain stores, and a majority in the West (57%) plan to shop in local chain stores.

Where do you browse/conduct most of your research/or see shoes you are going to buy?

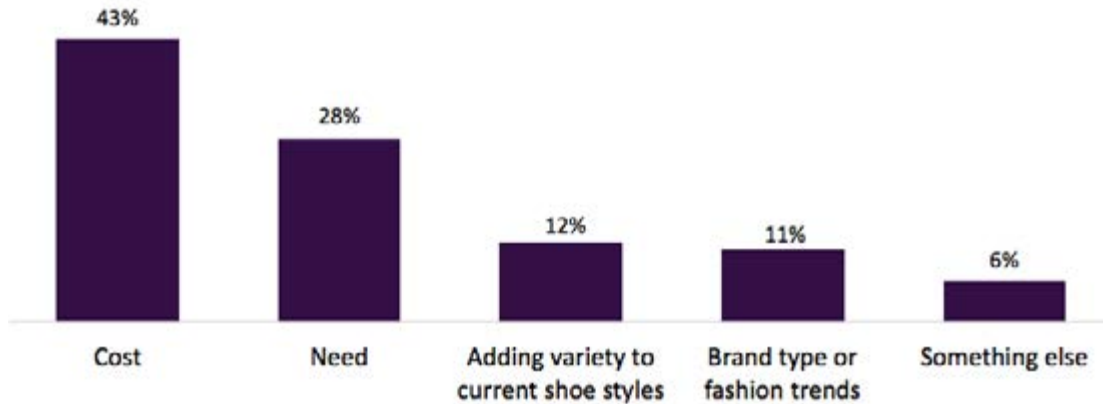
(National, November 10–14, 2019, MM, N=760, +/- 3.5%)



- Respondents were split on where they conduct most of their research or see the shoes they are going to buy: 40% said in stores when shopping and 40% said on retailer websites. 6% rely on friends and family, 5% said social media, and 4% in magazines.
- Among women, a plurality (46%) said in stores when shopping. Among men, a plurality (48%) said retailer websites.
- In the South, a plurality (44%) said they like to do their research on retailer websites while in the Northeast (46%), the Midwest (49%) and the West (44%), a plurality said they prefer to do it in stores while shopping.

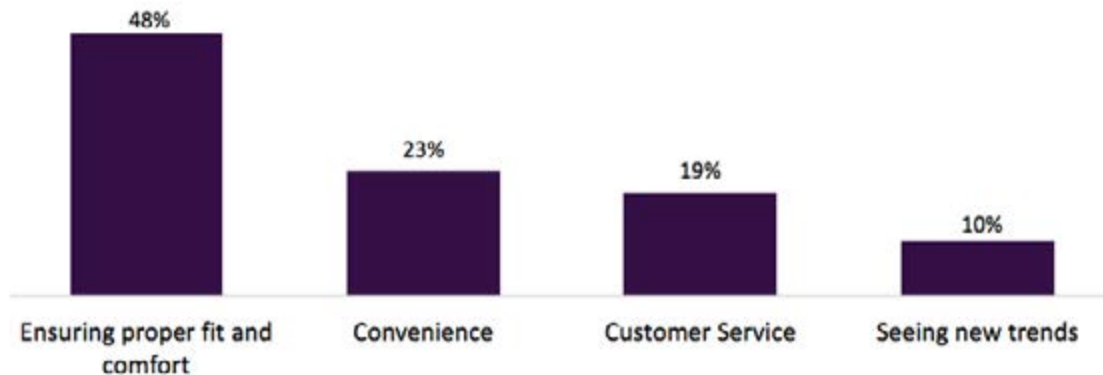
Survey Questions and Results

What is the most important factor when purchasing shoes this Holiday season? *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- The plurality of likely footwear buyers said the most important factor when purchasing shoes this holiday season is cost (43%), whereas 28% said need. 12% said adding variety to their current shoe styles was most important, and 11% said brand type or fashion trends.
- Looking at the breakdown by ethnicity, White shoppers were split between cost (38%) and need (33%), followed by brand or fashion type (12%) and adding variety (10%). For African-American shoppers, a plurality (47%) chose cost as the most important factor, followed by adding variety (22%) and need (16%). A majority of both Hispanic shoppers (52%) and Asian shoppers (50%) chose cost as the most important factor.

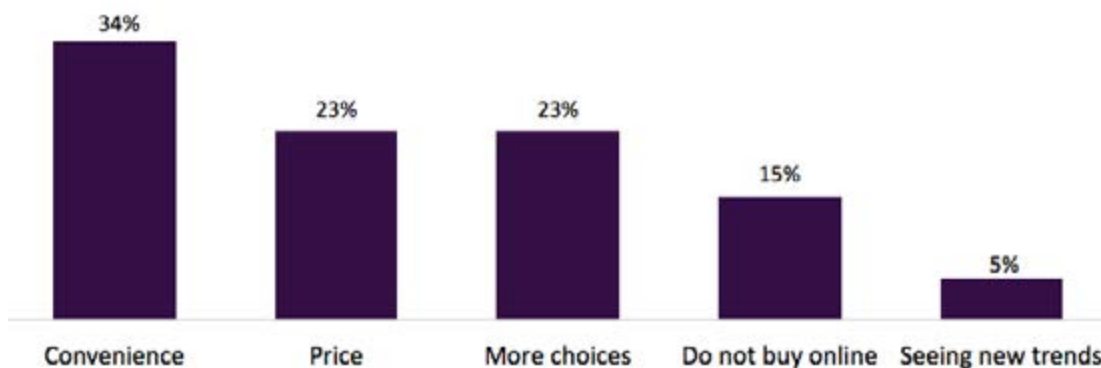
When you buy shoes in stores, what do you like most about the in-store shopping experience? *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- Regarding the in-store footwear shopping experience, getting a proper fit and comfort is the most popular aspect of shopping in store (48%), followed by convenience (23%), and customer service (19%).
- Of those 50 and older, 39% like that in-store they get a proper fit and comfort, followed by 30% who find the customer service aspect of the in-store shopping experience to be the best part.
- A majority of those under 50 (52%) say proper fit and comfort is what they like most, followed by 25% who say convenience.

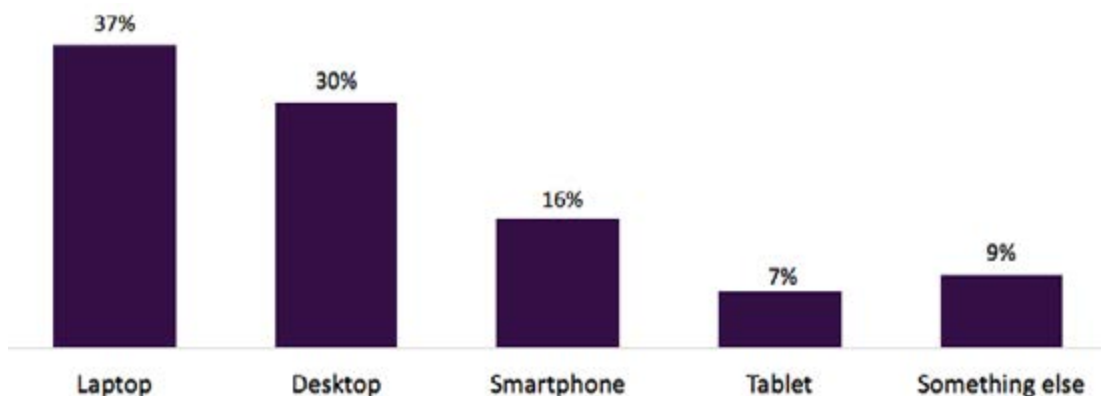
Survey Questions and Results

If you shop and buy shoes online, what do you most like about it versus buying in stores? *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- For shoppers who purchase shoes online, 34% like the convenience aspect of buying shoes online compared to purchasing in store. 23% are drawn to the price of shoes online, 23% like that there are more choices online, and 5% say they like to see new trends. 15% of shoppers do not buy online.
- Price is a bigger issue for men (29%) than it is for women (18%).
- Across all regions, a plurality said that convenience is what they like most about shopping for shoes online.

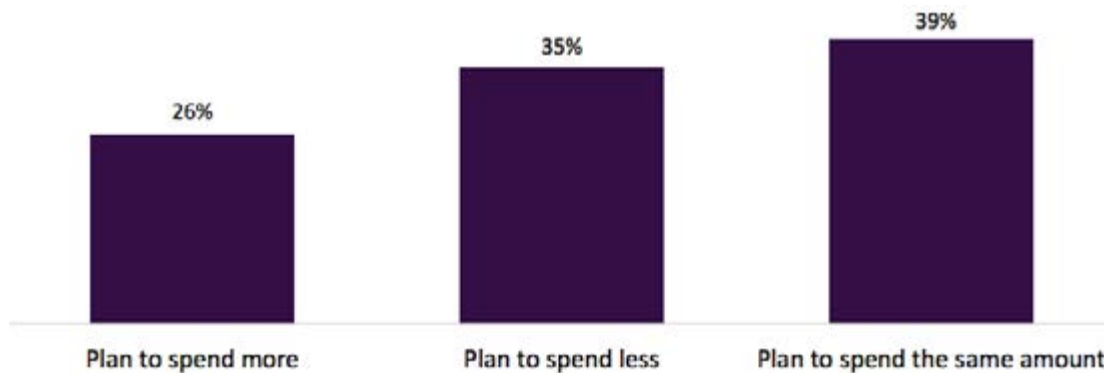
What is your preferred device for browsing and purchasing footwear online? *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- A laptop is the most preferred device for browsing and purchasing footwear online for a plurality (37%) of shoppers, followed by a desktop computer (30%), and a smartphone (16%).
- A plurality in the south (37%) prefer to use a desktop, while a plurality in the Northeast (46%), the Midwest (34%), and the West (39%) prefer to use a laptop.

Survey Questions and Results

Do you plan on spending more or less money this Holiday season compared to the 2018 holiday season on shoes for yourself and your family? (National, November 10–14, 2019, MM, N=760, +/- 3.5%)



- When asked if they plan to spend more or less money this holiday season compared to the 2018 holiday season on shoes for themselves and their family, 39% said they plan to spend the same amount, 35% plan to spend less money, and 26% plan to spend more money.
- In the South, shoppers are split, with 33% planning on spending more, 33% planning on spending less, and 34% spending the same amount.
- Among those in the Northeast region of the country, a plurality (48%) plan to spend the same amount, compared to 14% spending more and 39% who plan to spend less.
- A plurality of shoppers in the Midwest (37%) also are spending the same amount, with 36% spending less and 27% spending more.
- In the West, a plurality (41%) are also spending the same amount, with 33% spending less, and 27% spending more.

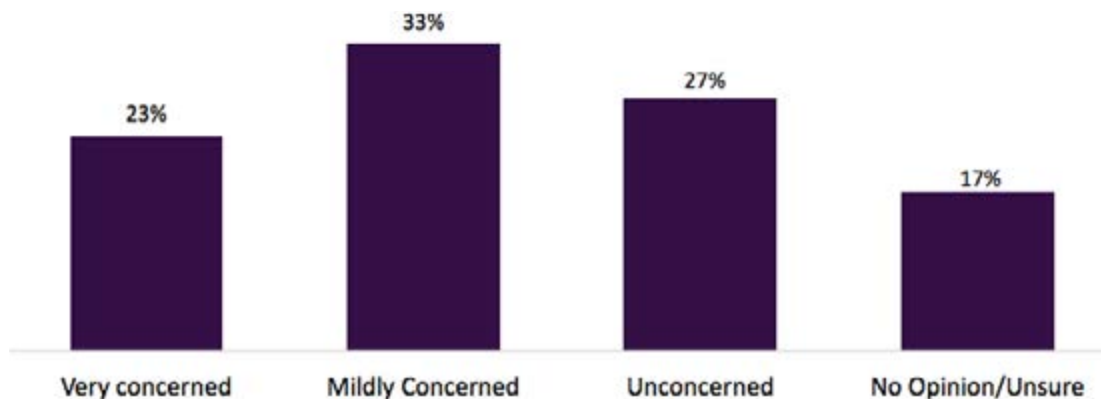
Survey Questions and Results

What is the total amount of money you plan to spend on footwear this holiday season for yourself and your family? *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- Asked the total amount they plan to spend, 44% of shoppers have budgeted between \$100–\$250 for themselves and their family this holiday season, 40% plan to spend less than \$100, 12% plan to spend between \$250–\$500, and 4% plan to spend more than \$500.
- Among White shoppers, 44% have budgeted less than \$100, 43% said they plan to spend between \$100–\$250, 11% said \$250–\$500, and 3% said more than \$500.
- For African-American shoppers, a majority (53%) are budgeting \$100–\$250. 24% of African-American shoppers are budgeting less than \$100, 17% said \$250–\$500, and 6% said more than \$500.
- A plurality of Hispanic shoppers (42%) said \$150–\$250, followed by 37% who said less than \$100, 16% said \$250–\$500, and 6% said more than \$500.
- A plurality of Asian shoppers (47%) also said \$150–\$250, followed by 42% who said less than \$100, 9% said \$250–\$500, and 1% said more than \$500.

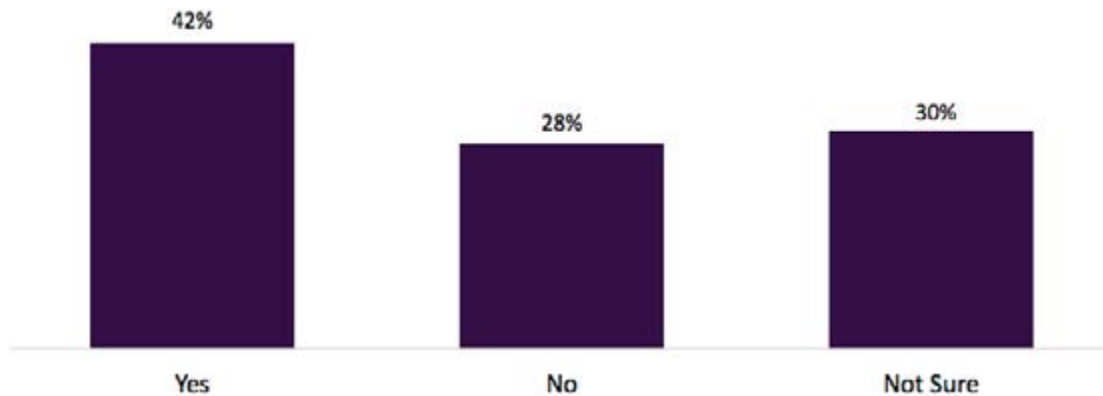
How concerned are you that US/China relations could result in you having to pay more for footwear this holiday season? *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- 56% of shoppers said they are mildly or very concerned that US/China relations could result in them having to spend more on footwear this holiday season. 27% of shoppers are unconcerned, and 17% have no opinion.
- Of those under 50, 18% said they are very concerned that US/China relations could result in them having to pay more for footwear and among those over 50, 34% said that they are very concerned.

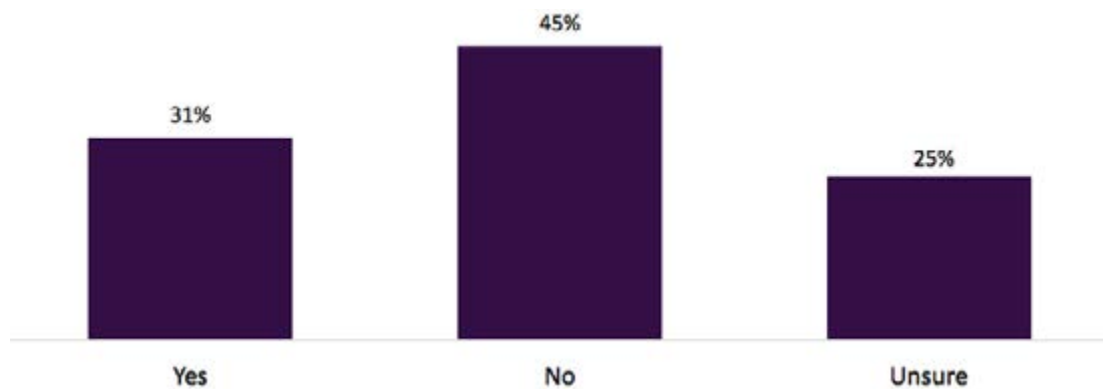
Survey Questions and Results

Would higher footwear prices this season cause you to curtail any footwear purchases? *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- 42% said that higher footwear prices this season would cause them to curtail any footwear purchases, 28% said it would not, and 30% were unsure.
- Across all regions of the country between 42% and 44% said that higher footwear prices would cause them to curtail footwear purchases.

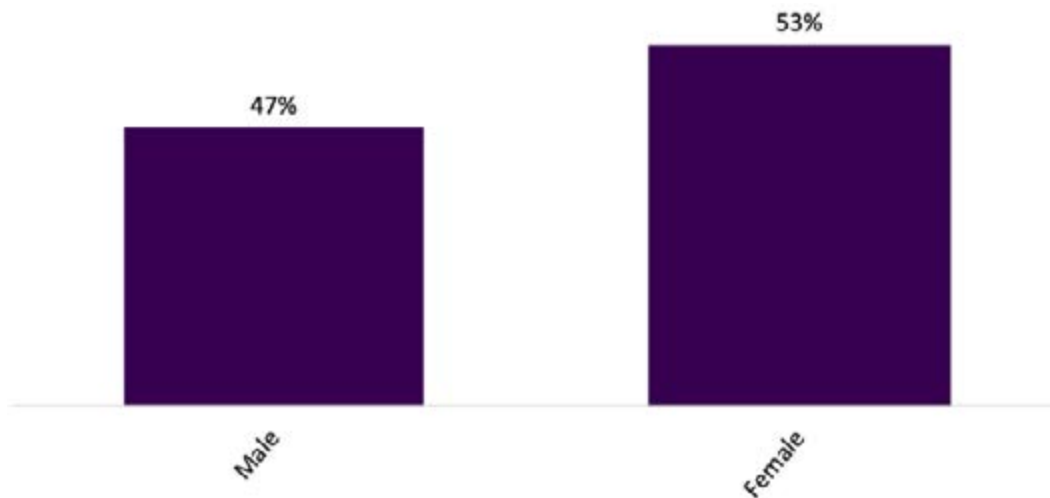
Do you support the Trump Administration's use of tariffs on items like footwear to combat China's unfair trade practices? *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- When asked if they support the Trump administration's use of tariffs on items like footwear, 45% said they do not support the tariffs, 31% said that they support them and 25% were unsure.
- Looking within age groups, of those under 50, 23% support and 50% oppose the Trump administration's use of tariffs and among those 50 and older, 46% support and 34% oppose their use of tariffs.

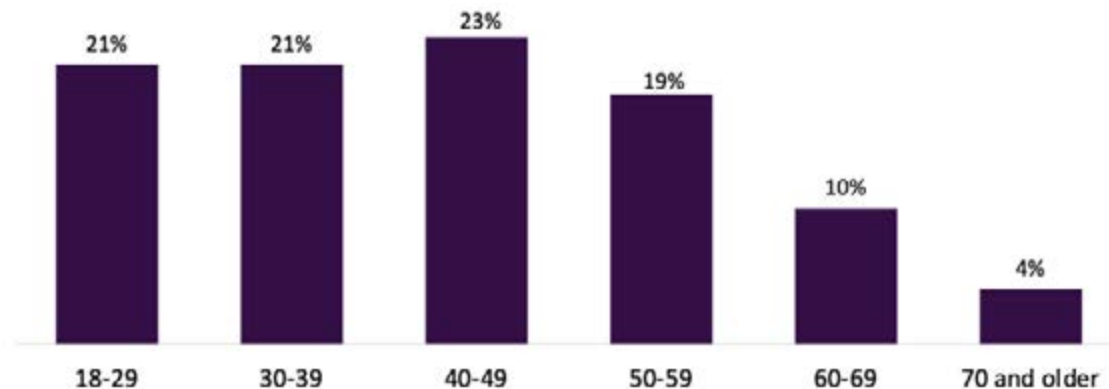
Demographic Charts

Gender *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- Females are slightly more likely to purchase footwear than their national average which is 51.3% of the population with 53% of the footwear purchasers being female

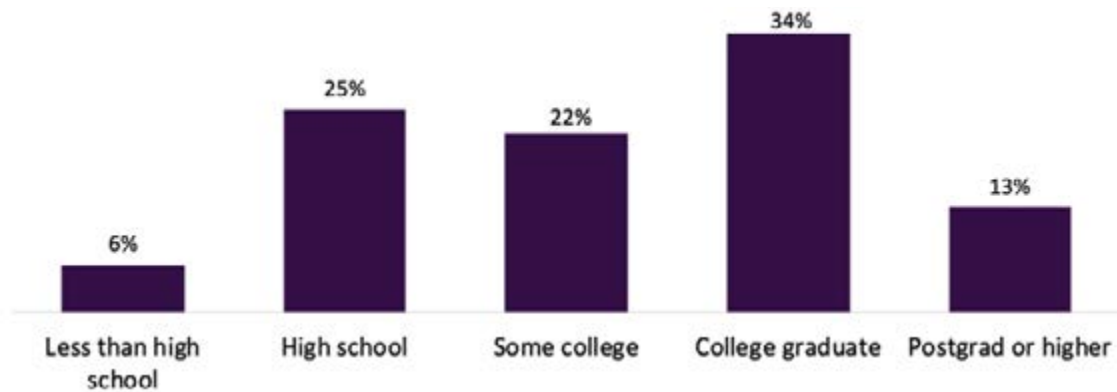
Age *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- Younger people are more likely to purchase shoes than older people when compared to their national averages
 - 18–29 year olds make up app. 19% of the population and account for 21% of buyers
 - 30–39 year olds make up app. 18% of the population and account for 21% of buyers
 - 40–49 year olds make up app. 19% of the population and account for 23% of buyers
 - 50–59 year olds make up app. 19% of the population and account for 19% of buyers
 - 60–69 year olds make up app. 13% of the population but account for 10% of buyers
 - Those over 70 account for app. 12% of the population but only 4% of buyers

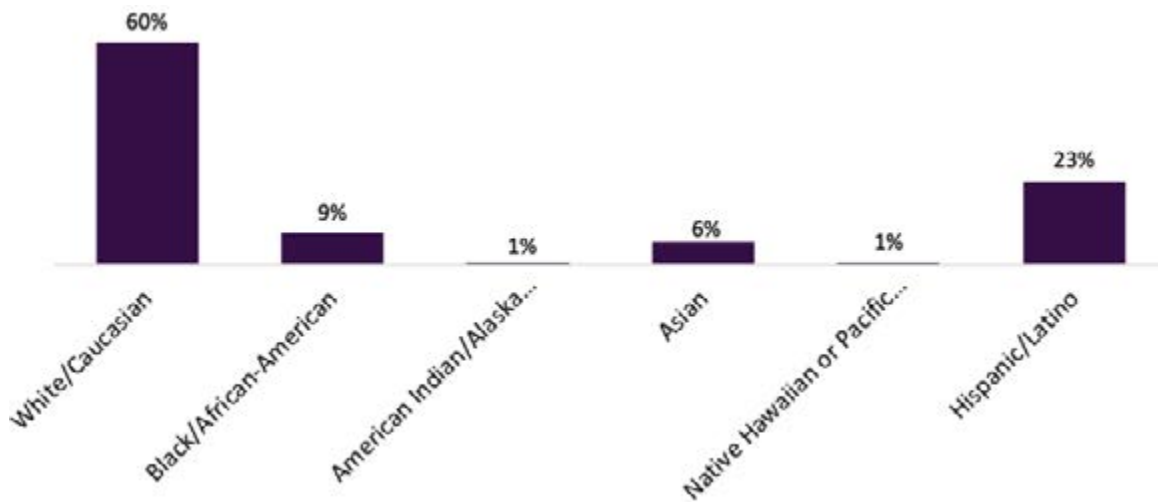
Demographic Charts

Educational Attainment *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- College graduates (Associate and Bachelor degrees) account for a larger portion of footwear purchasers than their national averages.
 - Those with less than a high school degree make up app. 12% of the population but only 6% of buyers
 - Those with a high school degree make up app. 28% of the population and 25% of buyers
 - Those with some college make up app. 20% of the population and 22% of buyers
 - Those with a College degree make up app. 27% of the population but 34% of buyers
 - Those with a Postgrad degree or higher make up app. 12% of the population and 13% of buyers

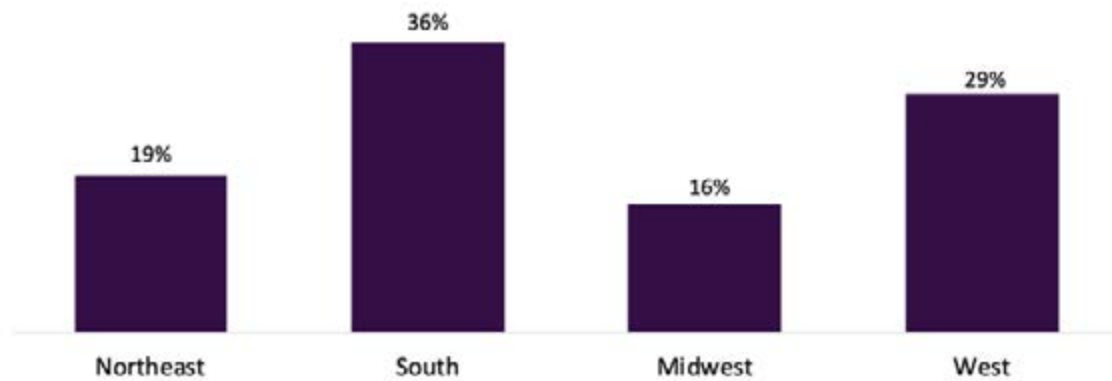
Ethnicity *(National, November 10–14, 2019, MM, N=760, +/- 3.5%)*



- Hispanic/Latino are more likely to purchase footwear than their general population numbers
 - Hispanic/Latino make up app. 18% of the population but 23% of buyers
 - Asians make up app. 6% of the population and 6% of buyers
 - White/Caucasians make up 61% of population and 60% of buyers
 - Black/ African American make up app. 12% of the population but only 9% of buyers

Demographic Charts

Region (National, November 10–14, 2019, MM, N=760, +/- 3.5%)



- The Western region of the Country is more likely to purchase footwear beyond their national average
 - The West makes up app. 23.8% of the population but 29% of likely footwear buyers
 - The Northeast makes up app. 17.2% of the population and 19% of buyers
 - The South makes up app. 38.1% of the population but 36% of buyers
 - The Midwest makes up app. 20.9% of the population but 16% of buyers