2020 HOLIDAY SHOE SALES SURVEY

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

FDRA
FOOTWEAR DISTRIBUTORS AND RETAILERS OF AMERICA

This survey was commissioned by

FDRA
FOOTWEAR DISTRIBUTORS AND RETAILERS OF AMERICA

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 COLLEGE | Polling

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).

Contents

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**.

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 +/- 3.6% in 19 of 20 cases.

An initial response of n=1,158 people entered the survey with n=398 (34%) 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, and online via a panel provided by Amazon MTurk, and was conducted between October 8–9, 2020.

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.

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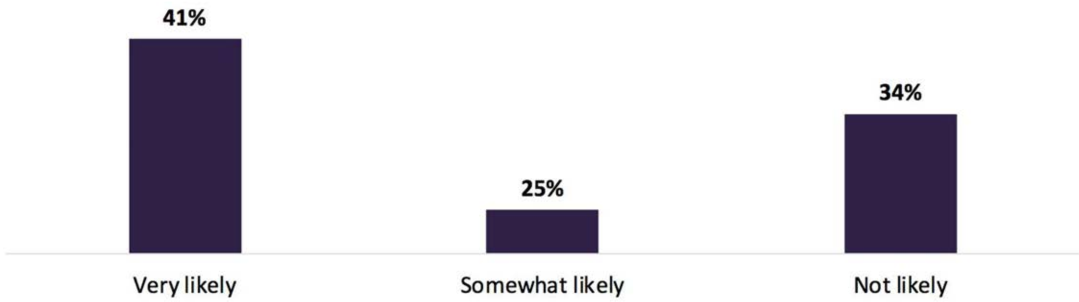
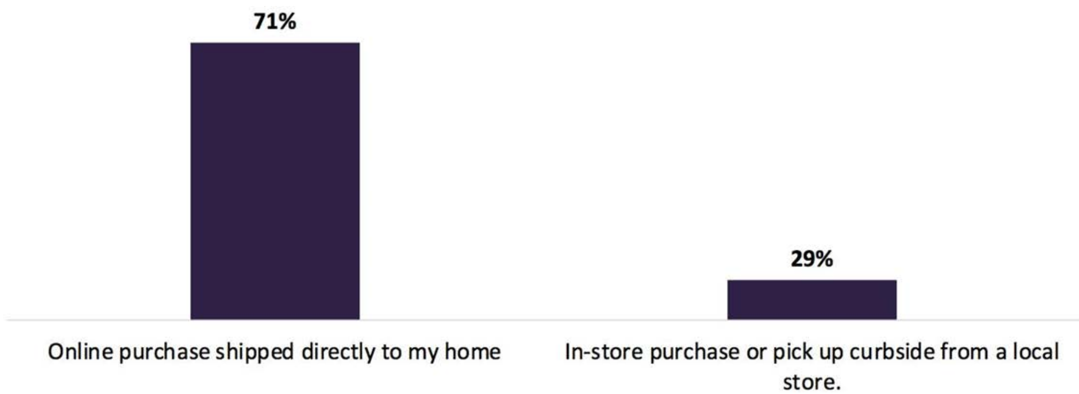
How likely are you to purchase new shoes for yourself or as gifts this holiday season? *(National, October 8–9, 2020, MM, N=1,158, +/- 2.8%)*



- This holiday season, 41% of respondents report that they are very likely to purchase new shoes, either for themselves or as gifts. An additional 25% are somewhat likely, while 34% are not likely to purchase.
- Those aged 18–29 and 30–39 are the likeliest purchasers, with 54% of each group considering themselves as very likely. Among those 40–49, 37% are very likely, and among 50–64 year olds, 37% are very likely. Only 15% of those 65 and older consider themselves very likely to purchase shoes this season.
- A majority of those in the Western region of the US (51%) are very likely to purchase, while a plurality of those in the South (47%) are also very likely. In the Northeast, only 32% are very likely, and in the Midwest, the lowest percentage, 24%, are very likely.
- Compared to the 2019 FDRA/Emerson survey, the percentage of respondents that are very unlikely to buy shoes this season has increased by 3%.

Do you plan on making your holiday shoe purchase online for home delivery, or do you plan on buying shoes from a local retailer in-store or order online and pick-up curbside? *(National, October 8–9, 2020, MM, N=760, +/- 3.6%)*



- A strong majority (71%) of purchasers plan to buy their shoes online this year, compared to 29% that plan to either shop in-store or do curbside pick-up.
- Those who live in the Northeast and South are more likely to shop in-stores than those living in the Midwest and Western US. Thirty-five percent (35%) of those in the Northeast, and 36% in the South plan to purchase in-store or do curbside pickup, compared to 24% in the Midwest, and 19% in the West.
- While a majority of every age category said they plan to do their purchase online, those 50-64 and those 65 and older are the most likely to purchase in-stores or curbside, at 45% and 44%, respectively. Women are also more likely to shop in-stores (32%), than men (26%).
- In 2019's survey, 52% planned to shop online, while 48% were electing to do their holiday shoe-shopping in-person.

If you were to go into a shoe store to look, try on or purchase shoes, where are you MOST comfortable shopping this holiday season? *(National, October 8–9, 2020, MM, N=760, +/- 3.6%)*

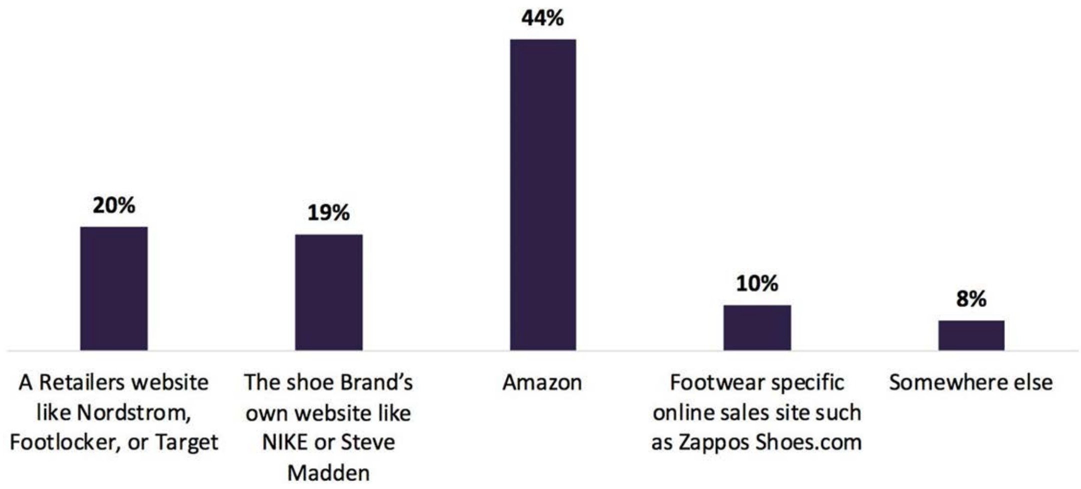
What would your second most comfortable in-person shopping experience this holiday season? *(National, October 8–9, 2020, MM, N=570, +/- 4.1%)*

- Malls rank as the most comfortable in-person shopping experience for the plurality (36%) of shoppers. Twenty-one percent indicated that they would not be comfortable shopping in any stores for shoes at this time. The rest of respondents were split between strip malls (17%), department stores (14%), and big-box stores such as Target (13%).
- Men are most comfortable in malls (42%) and strip malls (17%), while women are more split between malls (30%), department stores (21%), and strip malls (16%).
- Pluralities of those under 50 are the most comfortable shopping in malls, while the highest ranking options for those 50–64 are strip malls (25%) and department stores (20%). Stores such as Target rank the highest for those 65 and older, at 28%.
- Of the respondents that chose a 2nd most comfortable in-person shopping option (n=570), 28% chose department stores, 23% said stores such as Target, 21% said a strip mall, and 17% indicated malls.

Survey Questions and Results

Where do you most often browse shoes or purchase shoes online?

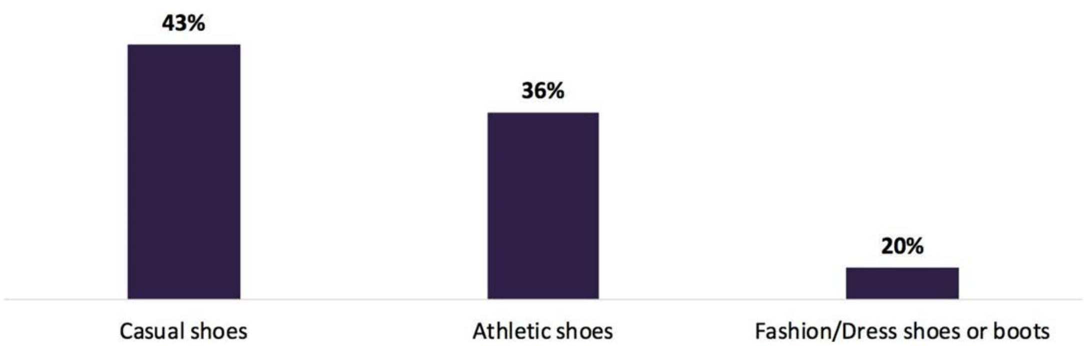
(National, October 8–9, 2020, MM, N=760, +/- 3.6%)



- A plurality of shoppers (44%) most often use Amazon for their browsing and purchasing, while 20% use a retailer's website, 19% use the shoe brand's website, and 10% use a footwear specific site such as Zappos.com. Eight percent (8%) indicated that they shop for shoes somewhere else online.
- A majority of White shoppers (50%) are using Amazon as their primary browsing and shopping sources online. Among Hispanic and Latino respondents, 28% are using the shoe brand's own website, 22% are using footwear specific sites like Zappos.com, and 20% are using Amazon. Among Black shoppers, 34% are using Amazon, 30% are using retailer's websites such as Nordstrom or Footlocker, and 26% are using the shoe brand's website.
- Since 2019's survey, the percentage of shoppers using Amazon has decreased 6% from 50%.

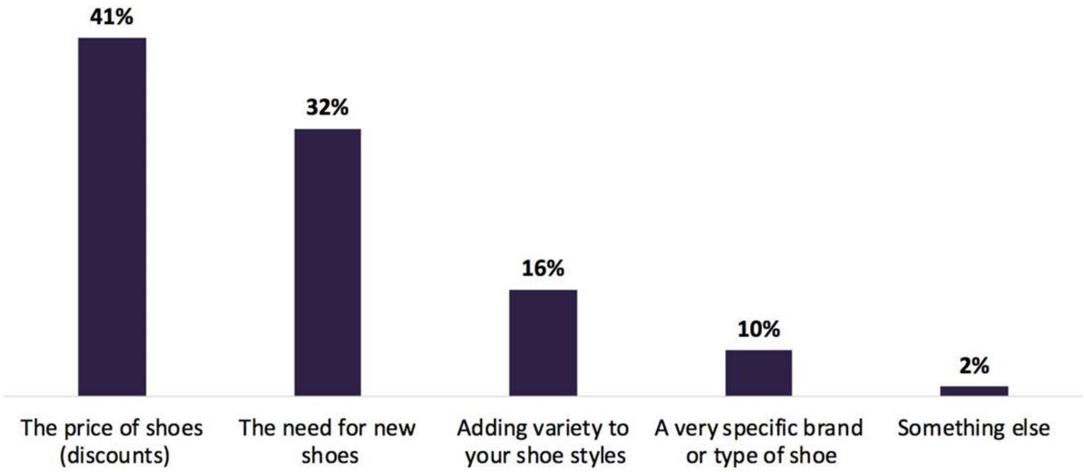
What type of shoes are you most likely to purchase this holiday season?

(National, October 8–9, 2020, MM, N=760, +/- 3.6%)



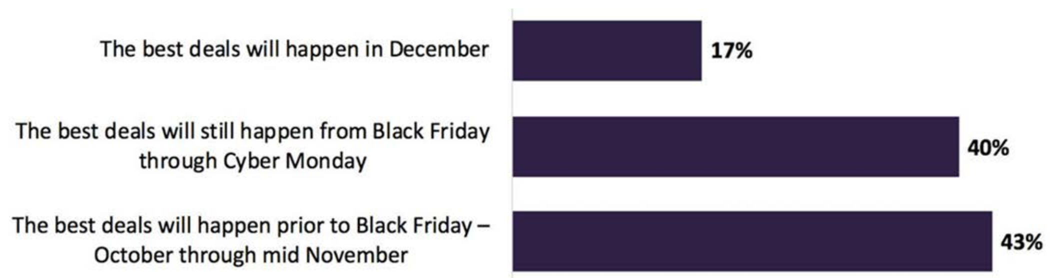
- Forty-three percent (43%) of shoppers are most likely to purchase casual shoes this season, followed by 36% who will be buying athletic shoes, and 20% who are planning to purchase fashion/dress shoes or boots.
- Men are split between athletic shoes (43%) and casual shoes (41%), with only 16% planning to purchase dress shoes or boots. Among women, 46% are purchasing casual shoes, and the remainder are split between athletic shoes (30%) and fashion/dress shoes or boots (24%).
- Casual shoes are the top choice of every age category except those 50-64, who plan to buy athletic shoes at a higher rate (47%).
- The most likely to buy fashion/dress shoes or boots are those with a graduate degree or higher (37%), those making more than $100,000 a year (28%), and those living in the Western region of the US (26%).

What is the most important factor that influences your shoe purchases for yourself or as gifts this holiday season? *(National, October 8–9, 2020, MM, N=760, +/- 3.6%)*



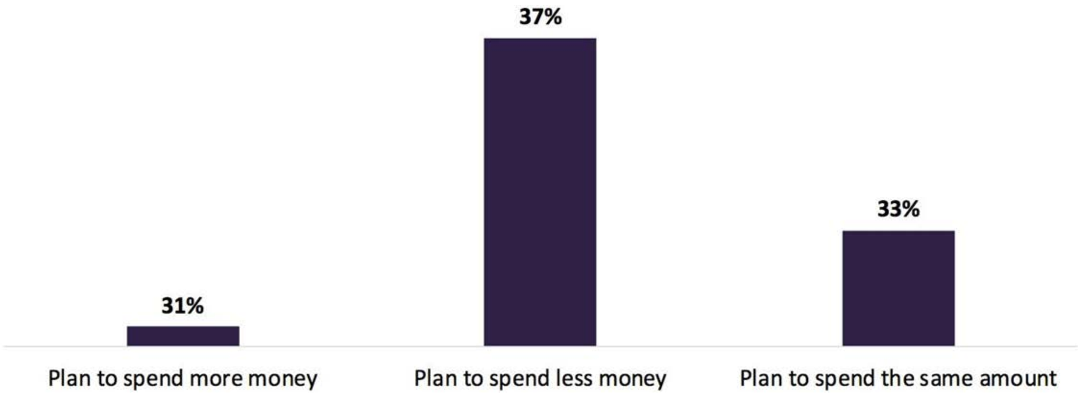
- The price of shoes and their accompanying discounts is the most important purchase factor for 41% of shoppers this season. Thirty-two percent (32%) said the need for new shoes will spur their purchase, while 16% are buying to add variety. Ten percent (10%) of shoppers are shopping with a very specific brand or type of shoe in mind, while 2% say another factor is the most important to them.
- Women are more likely than men to be shoe shopping to add variety (20% to 10%), and men are more likely to be shoe shopping out of necessity for new shoes (36% to 28%).
- Those who are shopping with a very specific brand or type of shoe in mind are more likely to hold a graduate degree (19%).

Retailers are doing away with the traditional holiday calendar this year and are offering holiday sales earlier than ever. When do you expect to find the best holiday deals that will encourage you to make purchases? *(National, October 8–9, 2020, MM, N=760, +/- 3.6%)*



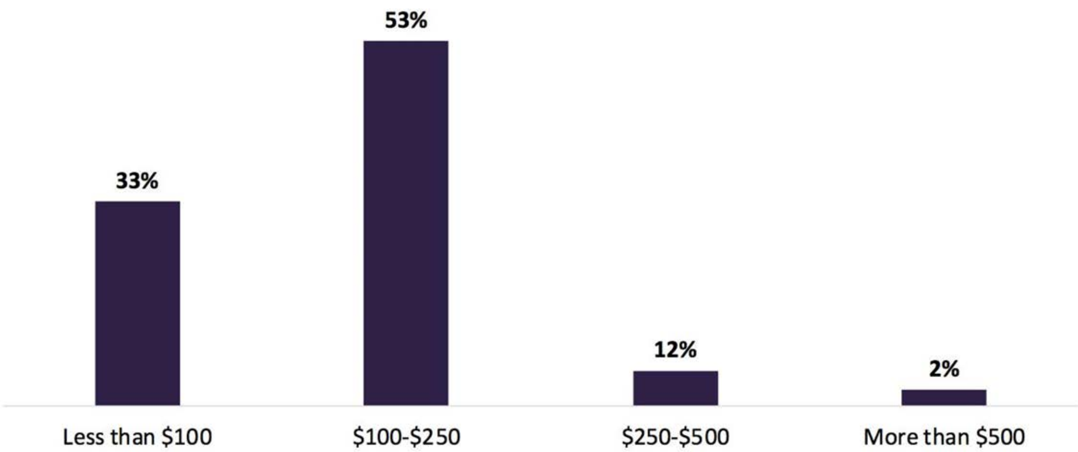
- Shoppers are looking for deals now; a plurality (43%) think that the best holiday footwear shopping options will happen prior to Black Friday, from October to mid-November. Forty percent (40%) think that the traditional weekend, Black Friday to Cyber Monday, will still hold the best deals, and 17% think that the best deals will happen in December.
- A majority of those living in the Northeastern (53%) and Western (51%) regions of the US expect the best deals prior to Black Friday, while a plurality of those in the South and Midwest, 41% and 43%, respectively, think of Black Friday-Cyber Monday as the best time for deals.
- Additionally, a majority (52%) of those planning on spending more than $250 on shoes this holiday season are looking for deals between now and Black Friday.
- Since 2019's survey, there has been a shift in when shoppers are expecting to buy. Last year, a majority (58%) planned to make their purchase between Thanksgiving and the end of November.

Do you plan on spending more or less money this holiday season on all the shoes you buy compared to last year? *(National, October 8–9, 2020, MM, N=760, +/- 3.6%)*



- Shoppers are split regarding how much they plan to spend. The plurality (37%) plan to spend less than last year, 33% plan to spend around the same amount, and 31% plan to spend more.
- A plurality of those aged 18–29 (49%) plan to spend more on shoes this year; inversely, a plurality of those 50 and older (40%) plan to spend less this year. Additionally, a plurality of men (36%) plan to spend more, while a plurality of women (41%) plan to spend less.
- A plurality (49%) of Black shoppers also plan to spend more money on shoes this holiday season, while a plurality of White shoppers (35%) plan to spend less and the majority of Hispanic shoppers (50%) plan to spend the same amount of money as last year.
- Last year, a plurality (39%) planned to spend the same amount. The percentage of shoppers that plan to spend more has gone up since last year, from 26% to 31%.

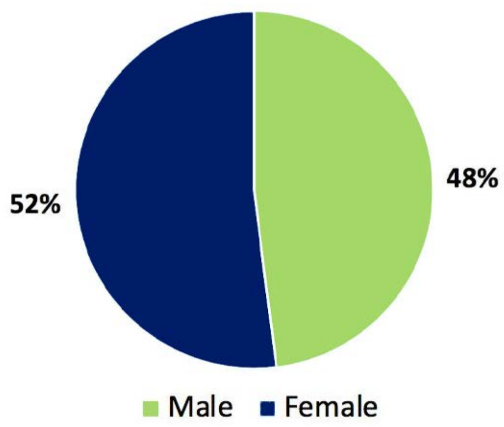
What is the total amount of money you plan on spending on footwear this holiday season? *(National, October 8–9, 2020, MM, N=760, +/- 3.6%)*



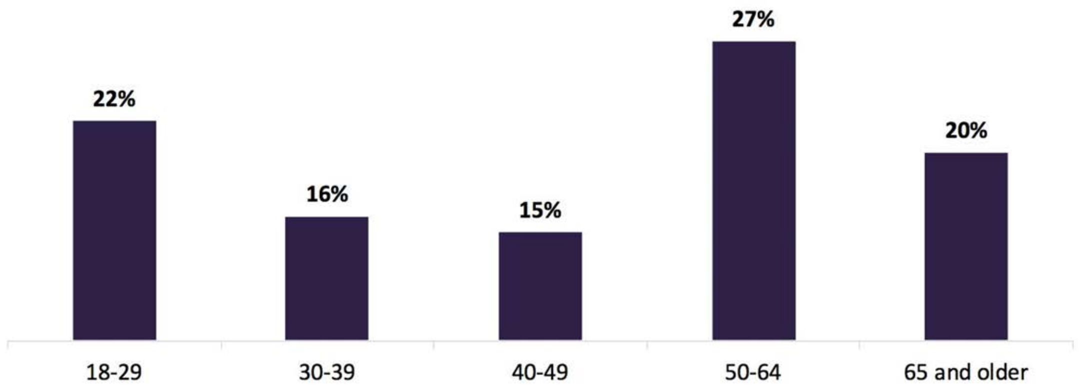
- The majority (53%) of respondents plan to spend between $100 and $250 this season, followed by 33% who plan to spend less than $100, 12% who plan to spend between $250 and $500, and 2% who plan to spend more than $500.
- Of those who plan to spend between $250 and $500, 40% live in the West and 39% live in the South, with only 13% of that group living in the Midwest and 9% living in the Northeast.
- Pluralities of all age categories of shoppers plan to spend between $100 and $250, except for 40-49 year olds, who are split between spending less than $100 (41%) and between $100 and $250 (40%).
- A quarter (25%) of Black respondents plan to spend between $250 and $500, and 9% of Black shoppers plan to spend over $500.

Demographics

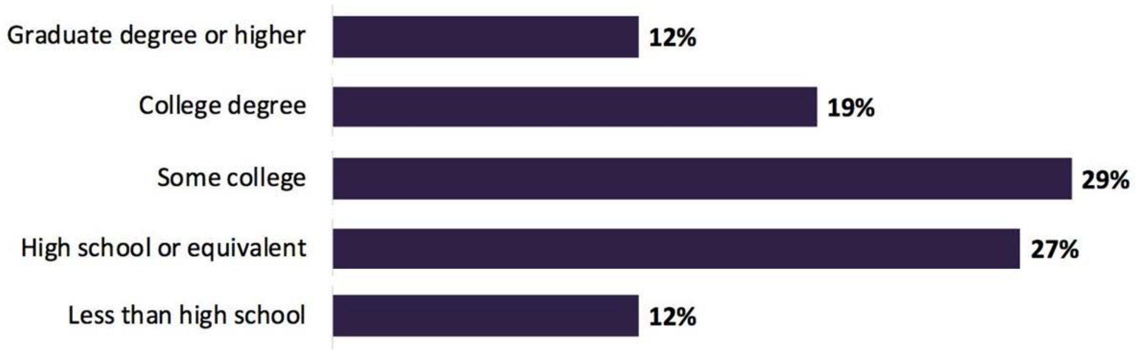
Gender *(National, October 8–9, 2020, MM, N=1,158 +/- 2.8%)*



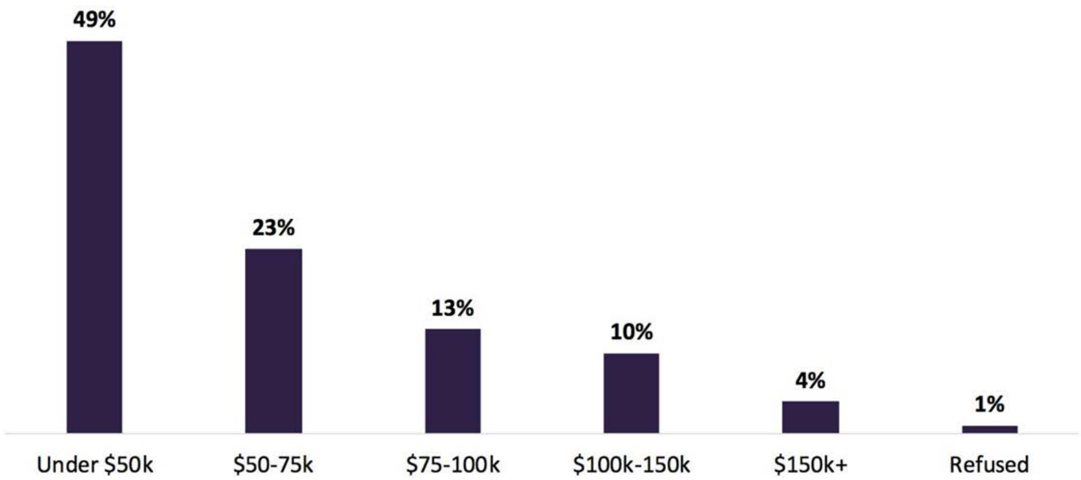
Age *(National, October 8–9, 2020, MM, N=1,158 +/- 2.8%)*



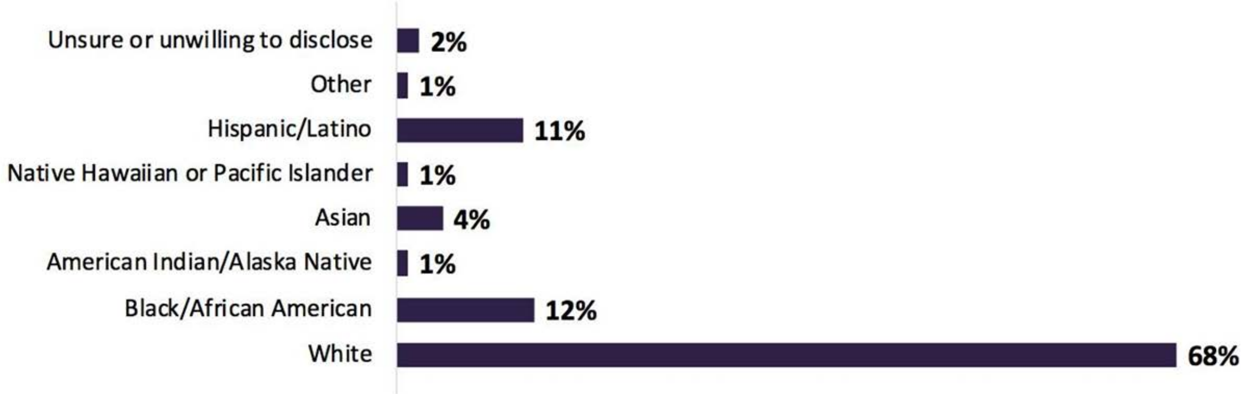
Educational Attainment *(National, October 8–9, 2020, MM, N=1,158 +/- 2.8%)*



Total Household Income Level *(National, October 8–9, 2020, MM, N=1,158 +/- 2.8%)*



Ethnic Background/Ancestry *(National, October 8–9, 2020, MM, N=1,158 +/- 2.8%)*



Region *(National, October 8–9, 2020, MM, N=1,158 +/- 2.8%)*