SPRING 2022 FOOTWEAR BUYING TRENDS

US National Public Opinion Survey of Spring Footwear Shoppers

FDRA + FFANY

This survey was commissioned by

FDRA

FOOTWEAR DISTRIBUTORS & RETAILERS OF AMERICA

+

FFANY

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.

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).

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Looking for more information on the footwear industry?

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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.

Methodology

Emerson College Polling, under the supervision of Associate Professor Spencer Kimball, is pleased to present the Footwear Distributors and Retailers of America with the findings from a survey of likely Spring season footwear shoppers. All respondents interviewed in this study were part of a fully representative sample using an area probabilistic sampling method of N=750 (sample size). The margin of error for the sample is +/- 3.5% in 19 of 20 cases.

An initial response of n=1,025 people entered the survey with n=275 (27%) 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 data collection and an opt-in online panel. The survey was conducted between April 9–10, 2022.

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.

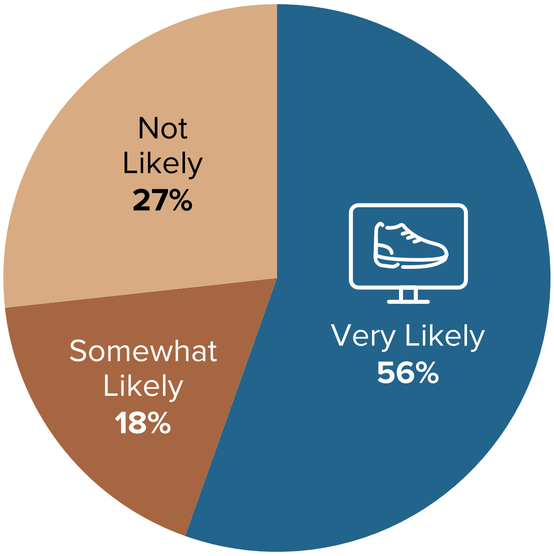
The purpose of these statistical tests is to determine whether or not the observed difference between sub-groups in the sample is due to sampling error or whether it is due to a real difference in the population. When the results are statistically significant, it strongly suggests that the observed difference 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.

Results

How likely are you to purchase new shoes for either yourself or your family this Spring season? *(National, April 9–10, 2022 MM, N=1,025, +/- 3%)*

A majority (74%) of US shoe shoppers say they are very likely (56%) or somewhat likely (18%) to purchase shoes this Spring season for themselves or their family. The 27% who were not likely to purchase shoes were asked demographic questions to ensure a representative sample.



Of those that were likely shoe buyers, men reported a higher percentage of being “very likely” than women to purchase shoes with 79%, compared to 73% of women. More women were “somewhat likely” than men to purchase shoes, at 27%, compared to 21% of men.

By age, shoppers aged 18–29 were the most likely to be very likely (83%), followed by those aged 30–39 (78%) and those aged 50–59 (78%).

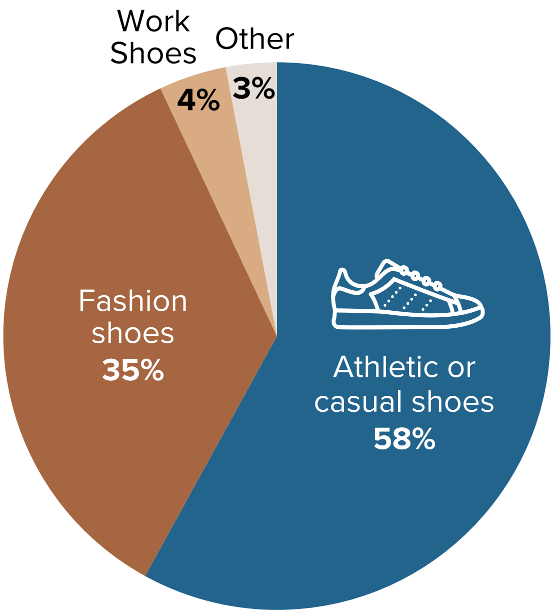
Shoe shoppers in the South reported higher rates of being very likely (81%) than those in the Northeast (77%), West (76%), and Midwest (65%).

Compared to the Spring 2021 survey, respondents reported that they were five points less likely to be shoe shopping this year (22% in 2021, 27% in 2022).

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

(National, April 9–10, 2022 MM, N=1,025, +/- 3%)

Athletic or casual shoes are the most likely type of shoe to be purchased for shoe shoppers or their family members with 58%, followed by fashion shoes with 35%, work shoes with 4%, and 3% say other.



Fashion shoes are a more common choice in the Midwest (40%), than in the West (38%), South (35%), and Northeast (27%).

Hispanic respondents were most likely to report planning on purchasing athletic or casual shoes, at 88%. Majorities of Asian (67%) and White shoe shoppers (51%) also reported being most likely to purchase athletic or casual footwear. Black shoppers were split between athletic or casual shoes (47%) and fashion shoes (42%).

Majorities of those with a high school degree or less (61%) and those with some college education (72%) are planning on purchasing athletic or casual shoes. Those with a college degree are split between athletic or casual shoes (48%) and fashion shoes (43%). Among those with a graduate degree or higher, a plurality (48%) said fashion shoes, and 42% said athletic or casual shoes.

The largest change since Spring 2021 has been an increase in the percentage of shoe shoppers planning on purchasing fashion shoes: 5% to 35%.

Results

This spring, do you plan on purchasing your new shoes online and shipped to your home, purchasing online for local in-store or curbside pickup or will you shop inside and purchase shoes in a physical store?

(National, April 9–10, 2022 MM, N=750, +/- 3.5%)

This spring, only 24% of shoe shoppers plan on purchasing new shoes in a physical store, with 19% planning on shopping online for in-store or curbside pickup. The majority of US shoe shoppers (57%) plan to shop fully online.

Majorities of men (65%) and women (50%) say they plan to shop online and ship to home; women report higher percentages on shopping online for pick-up (24%) than men (14%), as well as a higher percentage on shopping fully in-store (27%) than men (21%).

74% of those in the West plan to shop online and ship to home, compared to 54% of those in the Midwest, 53% of those in the Northeast, and 49% of those in the South.

The number of shoe shoppers opting to shop fully online has increased to 57%, from just 44% last Spring 2021. A greater number of individuals preferred in-store shopping last year at 45%, compared to just 24% in 2022. The number of shoe shoppers choosing to shop online for pick up at a local store increased from 11% in 2021, to 19% this year.

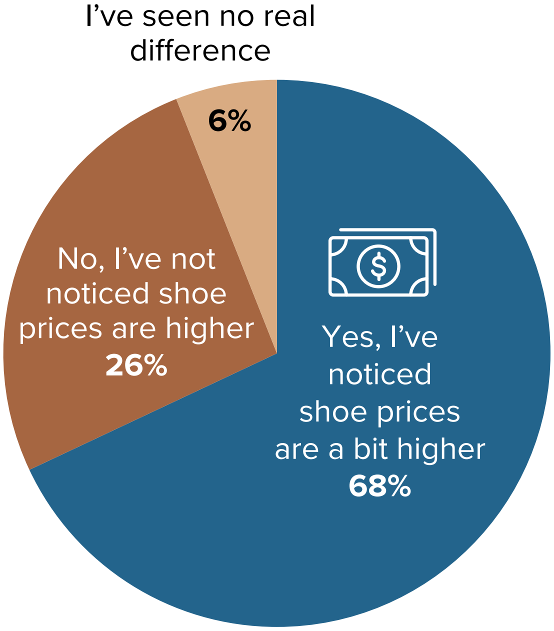
Prices on gas, grocery and other items have been increasing. Have you seen price increases for shoes? *(National, April 9–10, 2022 MM, N=750, +/- 3.5%)*

68% of Spring shoe shoppers say they have noticed that shoe prices are a bit higher, while 26% say they have not noticed shoe prices increasing. 6% say they have seen no real difference.

Men are fourteen points more likely to report being aware that shoe prices have increased than women (75% to 61%).

Shoppers aged 18–29 are most likely to have said they noticed shoe prices were a bit higher with 85% having noticed, followed by 40–49 year olds (74%), 30–39 year olds (62%), 50–59 year olds (60%), 60–69 year olds (51%), and those 70 and older (43%).

Asian shoppers were most likely to have noticed the increase in prices at 92%, followed by Hispanic shoppers (86%) and White shoppers (64%). Black respondents were most split, with 49% aware and 34% having not noticed the increase in prices.



Results

What is the primary thing you do to adjust to higher prices on retail items you may buy, like clothes, shoes and accessories?

(National, April 9–10, 2022 MM, N=750, +/- 3.5%)

A plurality (44%) of US shoe shoppers plan to shop less, or put off purchasing until later, to adjust higher prices on retail items. Other shoe shoppers (32%) opt for buying less items, rather than multiple items, for instance purchasing one pair of shoes instead of two. 24% of shoe shoppers choose to shop off-brand items at lower prices.

Shoppers under 50 are split between buying less items (38%) and putting off purchases (36%) to adjust to higher prices. Clear majorities of those aged 50–59 (60%), 60–69 (52%), and 70+ (70%) are shopping less or putting off purchases.

Women are most likely to put off purchases (47%) while 27% of women plan to buy less items and 26% plan to shop off brand. Men are more split between putting off purchases (41%) and buying less items (38%), while 21% plan to shop more off brand.

Shoppers with a college degree or postgraduate degree are more likely to buy less items (47%) than put off purchases (37%). For shoppers without a college degree, putting off purchases was the top option (49%) followed by shopping off-brand (28%), and buying less items (23%).

Are higher prices changing when you are shopping?

(National, April 9–10, 2022 MM, N=750, +/- 3.5%)

A majority of shoe shoppers (76%) confirmed that they are shopping more at discount retailers in order to find better deals, while just 24% continue to shop at the same retailers.

Men are more likely to report that they are shopping more at discount retailers to find better deals, with 83%, compared to women with 70%. Women are 13 points more likely to report that they are shopping at the same retailers but being more selective (30% to 17%).

If you see shoes you really like or need, but the price is higher than you expected, what will you do? *(National, April 9–10, 2022 MM, N=750, +/- 3.5%)*

49% of shoe shoppers will delay purchasing shoes they like or need if the price is higher than expected. 28% of shoe shoppers will still purchase the shoes now, whereas 23% will continue shopping but choose a pair of shoes that are cheaper.

Men are more split between putting off purchases (42%) and purchasing now (36%), while a majority of women (55%) plan to put off purchases, followed by 24% who are shopping now for cheaper shoes.

Asian shoppers are most inclined to still purchase now (59%), while majorities of White (52%) and Black (58%) shoppers are putting off purchases in hopes of a sale. A majority (51%) of Hispanic shoppers say they will keep shopping now, but choose a shoe that costs less.

Results

Where do you plan to shop for shoes online if shipping to your home?

(National, April 9–10, 2022 MM, N=426, +/- 4.7%)

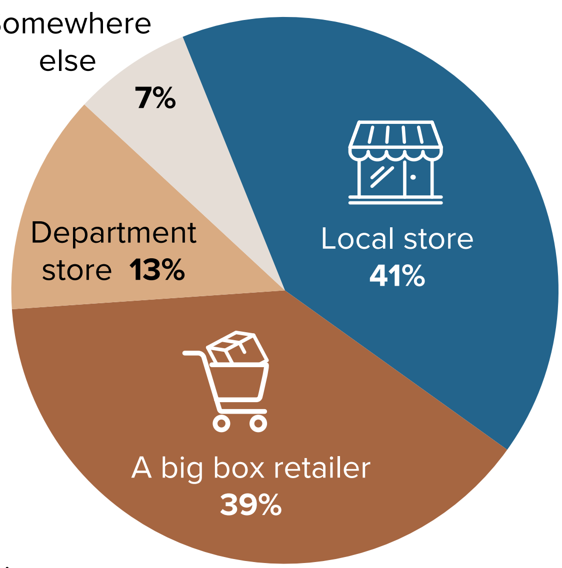
Amazon is the most popular option for those purchasing shoes for home shipping, with 50% of shoe shoppers choosing the site. 37% of shoppers plan to shop directly from the brand's own website (e.g. Nike), while just 12% shop from a retailer's website (e.g. Nordstrom, Footlocker). Only 2% of shoe shoppers plan to shop elsewhere.

Amazon has continued to be the most preferable option for shoe shoppers, with the number of individuals choosing the site increasing from 31% in 2021, to 50% this year. Shoe shoppers have also registered greater interest in shopping directly from a brand's own website, with 37% of individuals choosing this option compared to just 28% in 2021. Fewer shoppers (12%) are purchasing shoes from retailers compared to 14% of shoe shoppers last year. Similarly, fewer shoe shoppers (2%) are opting to shop elsewhere compared to 2021, in which 8% of shoe shoppers registered interest. The popularity of footwear specific online sites was recorded as 19% in 2021, but was not offered as an option in 2022.

Regionally, a majority of those in the Northeast (52%) and West (68%) plan to shop on Amazon, compared to a plurality (45%) in the South and a majority (52%) in the Midwest who plan to shop on the shoe brand's website.

Within race and ethnicity, there is some variance on where individuals plan to shop for shoes online: 48% of White shoppers and 73% of Hispanic shoppers plan to shop on Amazon, compared to 62% of Black shoppers and 56% of Asian shoppers who plan to shop on the shoe brand's own website.

Which type of in-store location do you plan to shop for shoes—either ordered online for pick up or in-store? *(National, April 9–10, 2022 MM, N=324, +/- 5.4%)*



41% of shoe shoppers plan to shop for shoes at local stores, such as DSW and Famous Footwear. Big box retailers (e.g. Target, Walmart) are the preferred location for 39% of shoe shoppers, whereas only 13% of shoppers plan to visit department stores (e.g. Nordstrom). Just 7% of shoe shoppers are planning to shop elsewhere.

Among those who say they plan to spend more money this Spring compared to last, 59% say they plan to shop at a big box retailer like Target, Walmart, or Costco.

Shoppers in the Northeast were split between local stores (33%) and big box retailers (34%) while a plurality (44%) of those in the South plan to shop at local stores. A majority (61%) of those in the Midwest plan to shop at big box retailers, and a majority (70%) of those in the West plan to shop at local stores.

The number of shoe shoppers planning to shop locally this year increased by 2 points (from 39% to 41%). Similarly, there is growing interest for shopping at big box retailers, with 39% of individuals registering their interest this year compared to 27% last year. Consumer interest in department stores has decreased by 2 points (from 15% to 13%). Interest in shopping elsewhere decreased significantly by 12 points (from 19% to 7%).

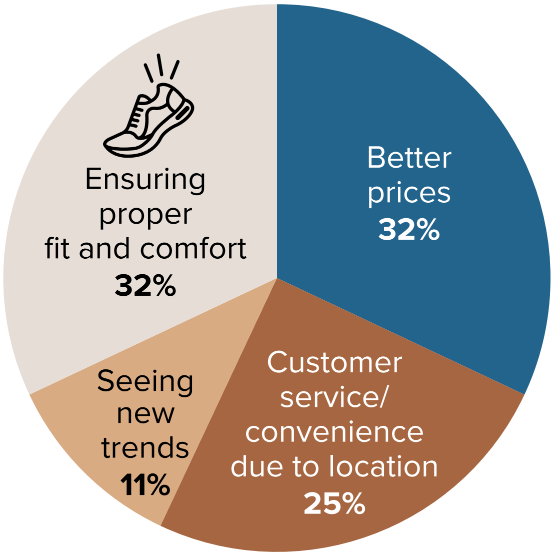
Results

When you shop shoes in stores, what do you like most about the in-store shopping experience? *(National, April 9–10, 2022 MM, N=750, +/- 3.5%)*

The two aspects most liked by shoe shoppers shopping in-store were finding better prices (32%) and ensuring proper fit and comfort (32%). 25% of shoppers prioritize customer service and/or convenience of the store's location, with just 11% declaring that they like seeing new trends.

Men are more likely to like better prices (35%) than women (29%), and women are more likely to prioritize convenience (27%) than men (22%).

Fewer shoe shoppers registered a preference for ensuring proper fit and comfort this year, with only 32% prioritizing this compared to 53% in 2021. Interest in seeing new trends increased by 4 points (from 7% to 11%) since last year. In 2021, preference for customer service (23%) and convenience/location (17%) was divided into two categories. This year, both customer service and convenience due to location were combined under the same category and registered as the most likable aspect for 25% of participants. It was recorded that 32% of shoe shoppers find better prices to be the most likable aspect of in-store shopping, but it was not offered as an option in 2021.

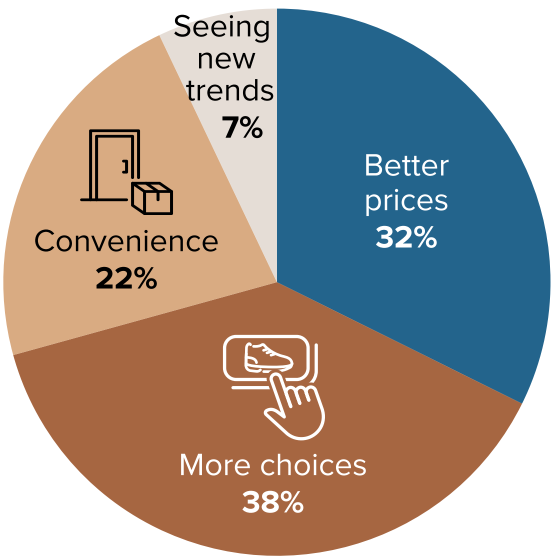


When you shop for shoes online, what do you most like about shopping online versus buying in-store? *(National, April 9–10, 2022 MM, N=750, +/- 3.5%)*

38% of shoppers like that there are more choices when shopping online compared to in-store, followed by better prices (32%) and convenience (22%). 7% of shoe shoppers like seeing new trends online.

More choices was the most popular aspect for those in the Northeast (32%), Midwest (38%), and West (51%), while a plurality (39%) of those in the South said better prices.

There was a significant decrease in the amount of shoe shoppers listing convenience as the most likable aspect of online shopping, dropping 11 points from 2021 (from 33% to 22%). Shoe shoppers' preference for having more choices increased by 8 points (31% to 38%), as well as an increase of 7 points for those who like finding better prices (25% to 32%). Fewer participants preferred seeing new trends as the reason for online shopping, with a drop of 4 points since last year (11% to 7%).



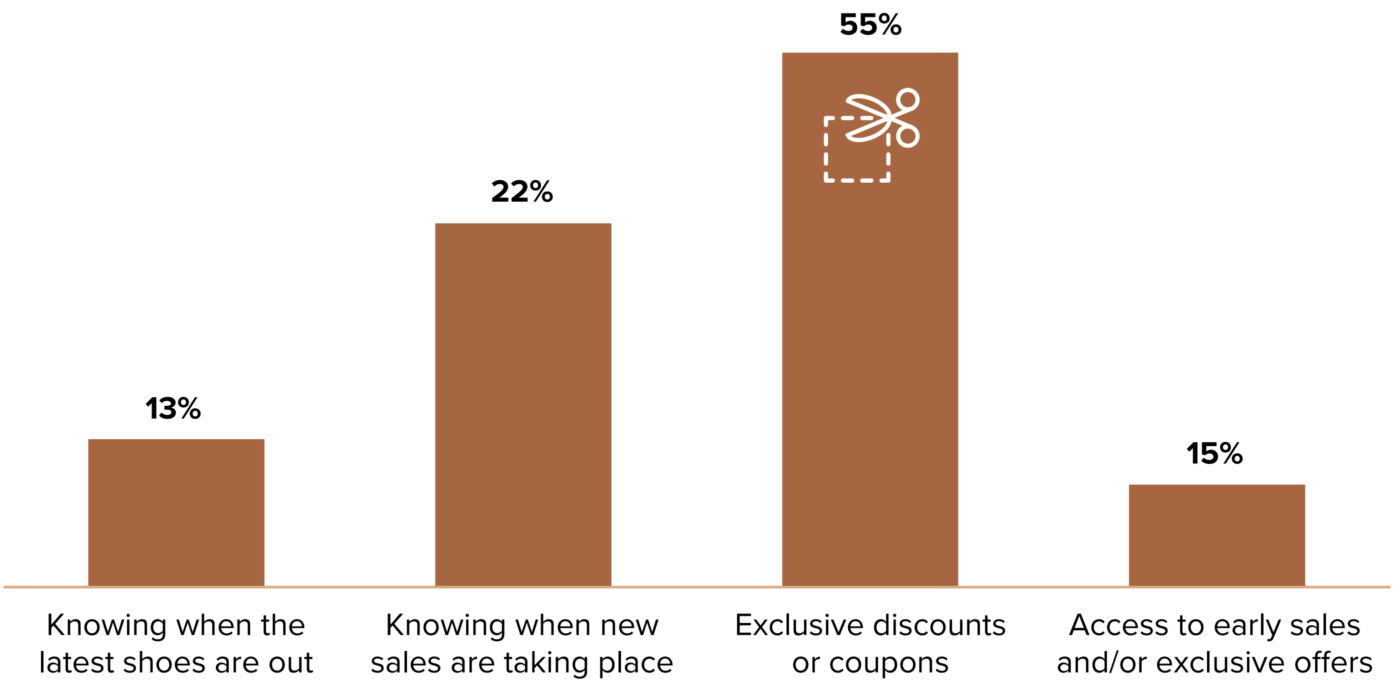
Results

If you sign up for a rewards program, what is the main benefit you are seeking? *(National, April 9–10, 2022 MM, N=750, +/- 3.5%)*

A plurality of shoe shoppers (47%) seek exclusive discounts from registering with a rewards program, with 32% wanting to know when new sales are taking place and 13% seeking updates on the latest shoe releases. 8% of shoe shoppers sign up in order to access early sales and/or exclusive offers.

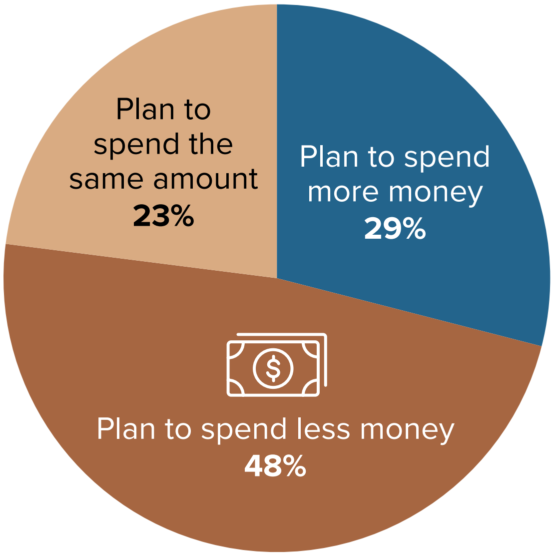
A majority (55%) of those who plan to spend less than $100 this season seek exclusive discounts or coupons for signing up for rewards programs, similarly, those who plan to spend between $100 and $250 seek exclusive discounts or coupons. On the other hand, a plurality (46%) those who plan to spend $250–$500 seek to know when new sales are taking place, and among those who plan to spend more than $500 on shoes this season, 39% seek to know when the latest shoes are out.

Exclusive discounts or coupons remain to be the most popular benefit sought by shoe shoppers since last year, although this percentage has dropped by 8 points (55% to 47%). A greater number of shoe shoppers (32%) would like to know when early sales are taking place, compared to just 22% in 2021. Fewer shoppers are interested in access to early sales and/or exclusive offers, with a drop of 6 points (15% to 9%). Last year, just 8% of participants registered interest in knowing when the latest shoes are out compared to 13% in 2022.



Results

Do you plan on spending more or less money this Spring compared to last Spring on shoes for yourself and your family? *(National, April 9–10, 2022 MM, N=750, +/- 3.5%)*



A plurality of US shoe shoppers (48%) plan on spending less money this Spring on shoes for themselves or family, compared to last Spring. Only 29% of individuals plan on spending more money this Spring, with 23% planning on spending the same amount.

A majority (56%) of women plan to spend less money this Spring compared to last Spring on shoes for themselves and their family, while men are more split: 38% plan to spend less money and 38% plan to spend more money.

Majorities of those 50–59 (51%), 60–69 (61%), and 70 and older (79%) plan to spend less on shoes this Spring. Those 40–49 are most split between spending more (38%) or less (44%).

A plurality of those with a college degree (43%) and a majority of those with a graduate degree (50%) plan to spend more on shoes, while majorities of those with a high school degree or less (51%) and some college (63%) plan to spend less this Spring.

The number of shoe shoppers planning to spend less money on shoes increased significantly by 16 points, compared to participants asked in 2021 (32% to 48%). There was an increase of 3 points (26% to 29%) this year in the number of shoe shoppers planning to spend more money. Only 23% of this year's shoe shoppers plan to spend the same amount, compared to 43% in 2021.

What is the total amount of money you plan on spending on footwear this spring season for yourself and your family? *(National, April 9–10, 2022 MM, N=750, +/- 3.5%)*

52% of shoe shoppers plan on spending between $100–$250 on footwear this Spring for themselves or family, with 32% planning on spending less than $100. In comparison, 14% of shoppers state that they plan to spend between $250–$500, and just 2% predict spending more than $500.

Majorities of those aged 18–29 (57%), 40–49 (56%), 50–59 (60%), and 60–69 (56%) plan to spend between $100–$250 on shoes, while a plurality (43%) of those 30–39 and a majority (79%) of those over 70 plan spend less than $100.

The most popular budget for shoe shoppers continues to be between $100–$250, with an increase of 4 points (48% to 52%) since 2021. The number of participants planning to spend less than $100 dropped by 8 points (40% to 32%). Since last year, shoe shoppers planning on spending between $250–$500 increased by 3 points (11% to 14%). The number of shoe shoppers willing to spend more than $500 increased from 1% in 2021, to 2% this year.