

FDRA | FFANY

2024 Holiday Shoe Sales Forecast

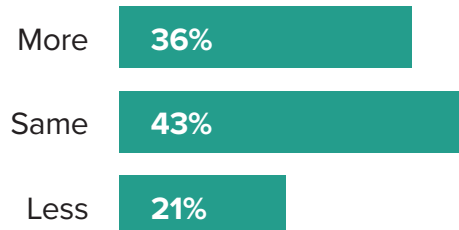
Nationwide survey of footwear consumer purchasing habits this holiday season



Survey Highlights

- 53% of shoppers plan to buy shoes between Black Friday and Cyber Monday.
- 60% are shopping for branded footwear versus non-branded value footwear.
- 84% said they would be open to purchasing footwear categories they don't usually buy if price or promotions are favorable.

Is what you plan to spend this season on shoes more or less than what you spent during last year's holiday season?



This survey was commissioned by

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

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Representing 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 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



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

Methodology..... 1
Survey Questions
and Results 2
Demographics 8

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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 U.S. All respondents interviewed in this study were part of a sample of N= 1,000 likely shoe shoppers (sample size).

Data was weighted by U.S. general population parameters. The credibility interval, similar to a poll's margin of error, for the sample is +/- 3% in 19 of 20 cases. The survey was administered via an online panel. Data was collected between November 1–2, 2024.

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

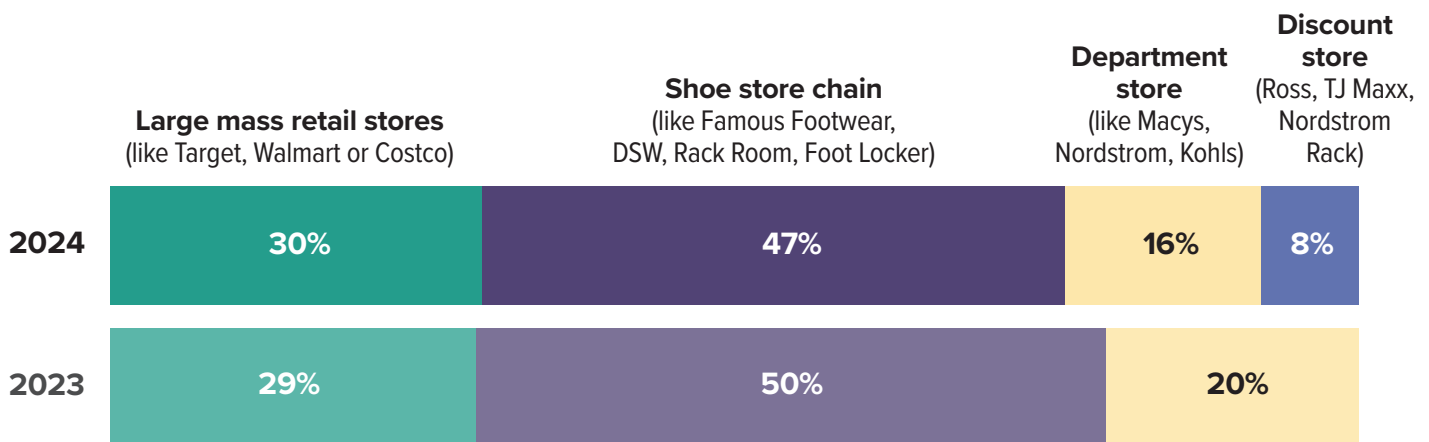
Do you plan on making your holiday shoe purchase online for home delivery, or do you plan on going into a local retailer store to buy shoes?



A majority of respondents (57%) plan to make in-store purchases or pick up curbside from a local retailer, while 43% plan to make online purchases shipped directly to their home.

- Those in the West are most likely to shop in-store at 62%, compared to 55% in all other regions of the country.
- Likelihood to shop in-store generally decreases with higher degrees of educational attainment: 73% of those without a high school degree plan to shop in-store, compared to 60% of those with a high school degree, 59% of those with some college education, 57% of college graduates, and 41% of those with a postgraduate degree.

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



Forty-seven percent plan to shop at a Shoe Store Chain (like Famous Footwear, DSW, Rack Room, Foot Locker), 30% plan to shop at large mass retail stores (like Target, Walmart, or Costco), 16% plan to shop at department stores (like Macy's Nordstrom, Kohls), and 8% plan to shop at discount stores (like Ross, TJ Maxx, Nordstrom Rack).

- Those in the Midwest are most likely to shop at large mass retail stores at 42%, compared to 27% of those in the Northeast, 31% of those in the South, and 21% of those in the West. Those in the Northeast and West are most likely to shop at shoe store chains at 50%, followed by those in the South at 46% and Midwest at 41%.



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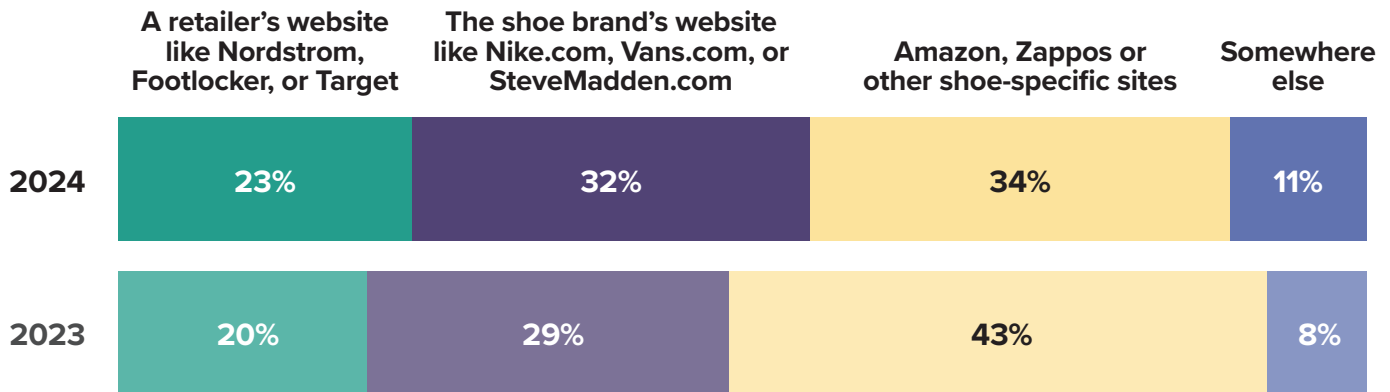
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SURVEY QUESTIONS AND RESULTS

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



Thirty-four percent plan on shopping at Amazon, Zappos, or other shoe specific sites, 32% plan on shopping at the shoe brand's own website, 24% plan on shopping at a retailer website like Nordstrom, and 11% plan on shopping somewhere else online.

- Young online shoppers are most likely to shop at the shoe brand's own website at 47%, while those in their 30s are most likely to shop at retailers' websites.
- Those in their 40s are split between the shoe brand's website at 37%, retailers website at 30%, and Amazon/Zappos at 25%.
- Those in their 50s shop at Amazon/Zappos or other shoe specific sites, along with 38% of those 65 or older.

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

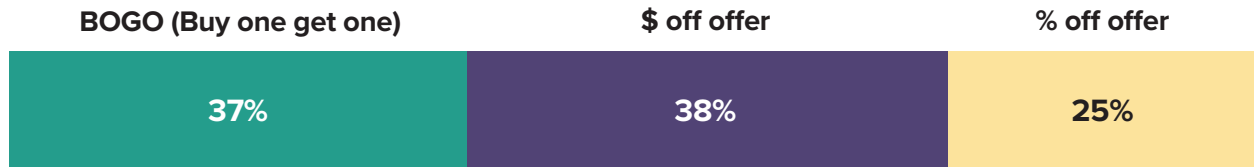


A majority (59%) plan on shopping for branded shoes, while 41% plan to look for the best shoes at the right price, regardless of logo.

- Older shoppers are more open to purchasing shoes based on value, rather than brand: a majority (59%) of those ages 65 and older say they are looking for shoes at the right price, regardless of logo, while those between the ages of 50–64 are split evenly.
- Men are more likely than women to shop for branded shoes at 64%, compared to 55% of women who say the same.

SURVEY QUESTIONS AND RESULTS

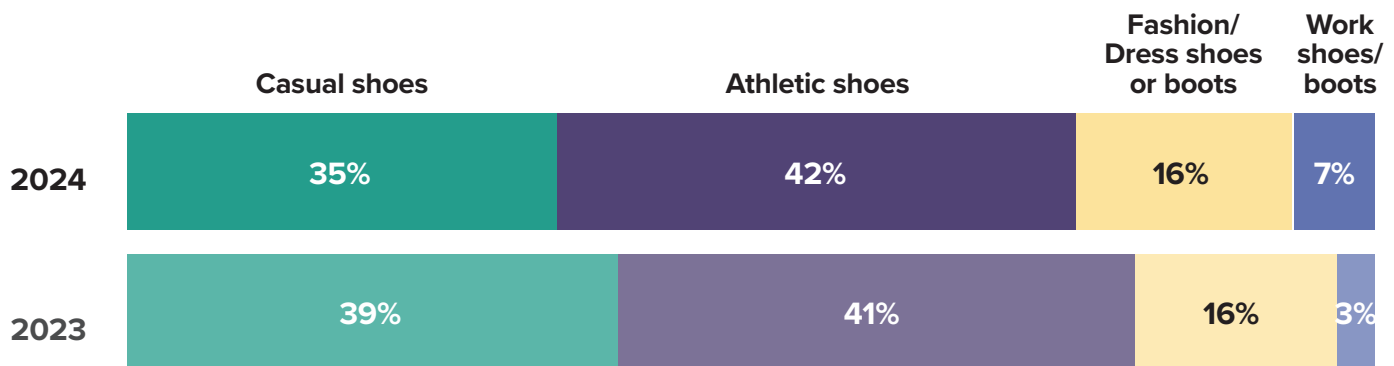
If you were casually shopping for shoes this holiday season, which type of promotion would most likely drive you to make an actual purchase?



A plurality (39%) say a \$ off offer would be most likely to drive them to an actual purchase, 37% find a BOGO offer would drive them to a purchase, and 25% say a % off offer would be most effective.

- \$ off offers appear to be most effective for people shopping for shoes in-store at shoe store chains (47%), department stores (44%), and discount stores (45%), while a plurality of people shopping at large retail stores (47%) say a BOGO offer would drive them to make a purchase.

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

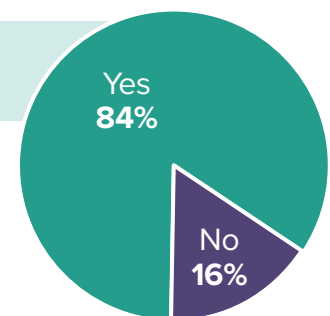


Athletic shoes are most popular at 42%, followed by casual shoes at 35%, fashion or dress shoes or boots at 17%, and 7% work shoes/boots.

- Since last year, athletic shoes stayed about the same, moving from 41% to 42%, casual shoes dropped from 39% to 35%, fashion shoes also stayed almost the same from 16% to 17%, and work shoes increased from 3% to 7%.

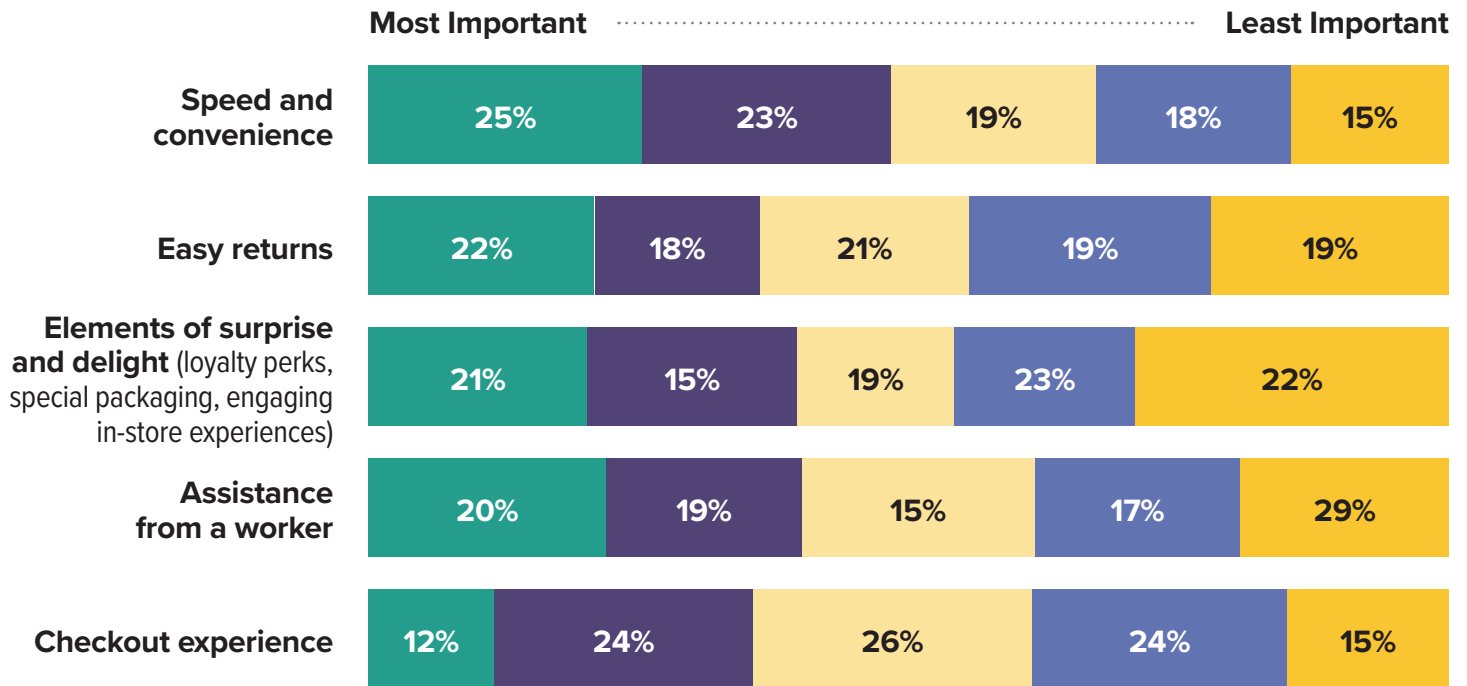
Would you be open to purchasing footwear categories you don't usually buy if the price or promotions were favorable?

A majority (84%) would be open to purchasing footwear categories they don't usually buy if the price or promotions were favorable, while 16% would not be.

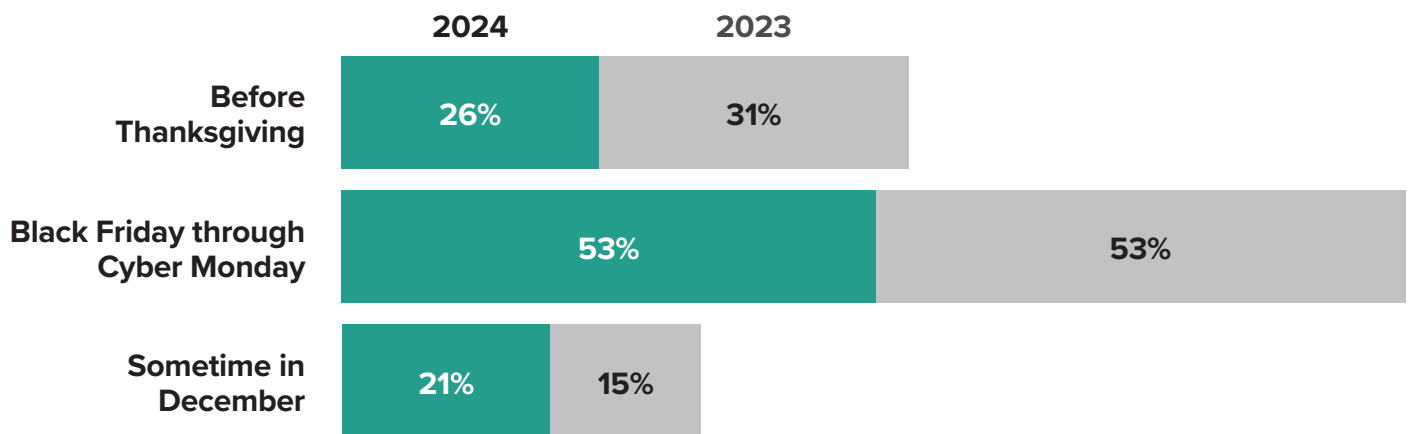


SURVEY QUESTIONS AND RESULTS

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



When do you expect to make your holiday footwear purchases?

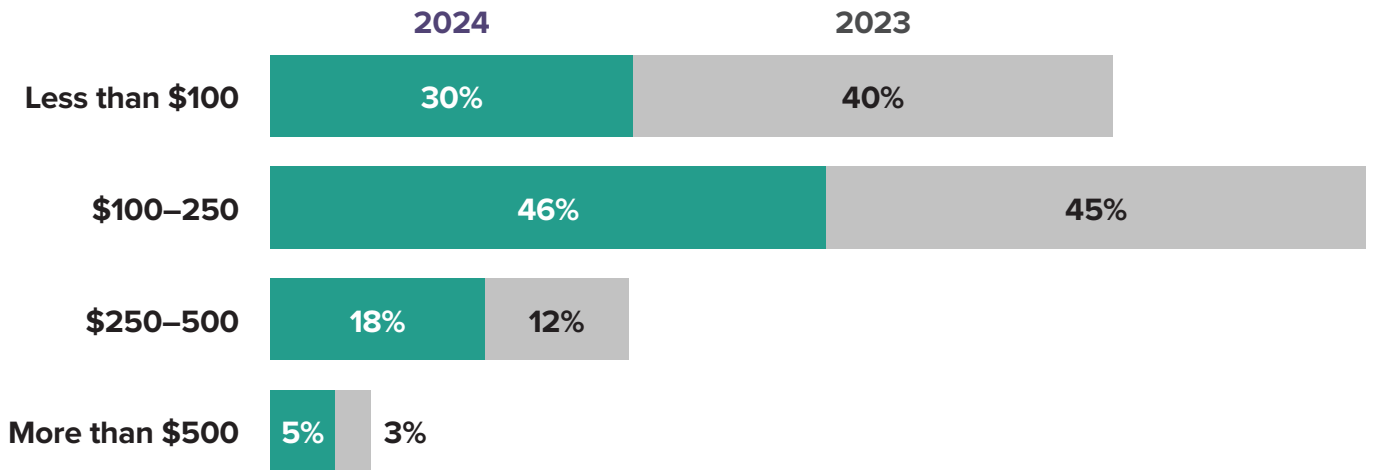


A majority (53%) plan to make their holiday footwear purchase from Black Friday through Cyber Monday, while 26% plan to make their purchase before Thanksgiving, and 21% plan to make their purchase sometime in December.

- The same share of shoppers last year and this year planned to make their holiday footwear purchase between Black Friday through Cyber Monday, 53%, while those looking to make purchases before Thanksgiving decreased from 31% to 26%, and those who are looking to buy in December increased from 15% to 21%.

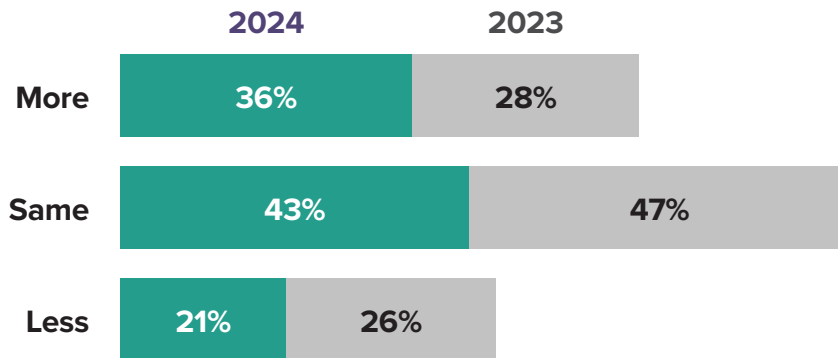
SURVEY QUESTIONS AND RESULTS

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



Forty-six percent of shoppers plan to spend \$100 to \$250 on footwear this holiday season, 30% plan to spend less than \$100, 18% between \$250 and \$500, and 5% more than \$500.

Is this more or less money than you spent on shoes compared to last year's holiday season?

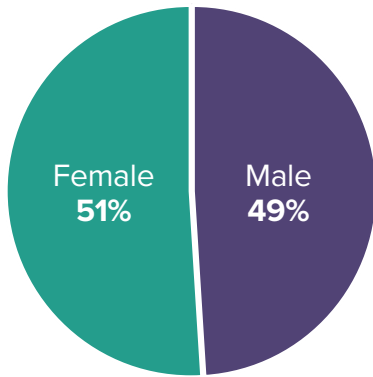


Spending intention varies by gender: men are more likely to spend more: 41% more, 18% less, and 40% same. A plurality of women (46%) plan on spending the same, 32% more, and 23% less.

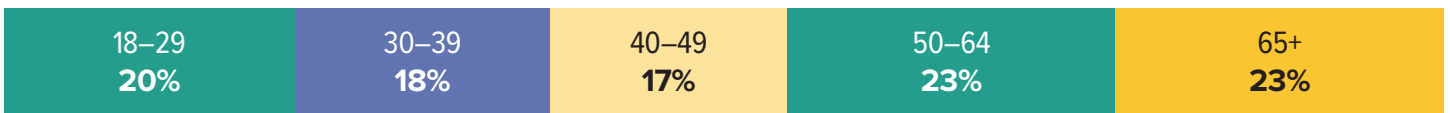
- Forty-six percent of shoppers planning to purchase fashion or dress shoes say they plan on spending more money on shoes this year than last year, compared to 36% of those shopping for athletic shoes, 35% work shoes, and 32% casual shoes.

DEMOGRAPHICS

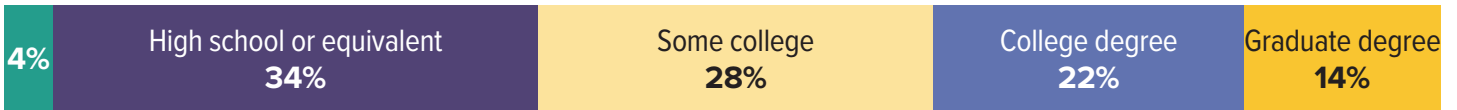
Gender



Age



Educational Level



Less than High School

Total House Income Level



Region



Ethnic Background or Ancestry

