Footwear Retailing - UK - July 2012

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"Mintel estimate that total online sales of shoes reached approximately £660 million incl-VAT in 2011, representing 8.3% of the total footwear market and we expect this spending to more than double by 2016. Multichannel and m-commerce initiatives will drive much of this growth and that will impact the high street with fewer independents able to survive and the weaker chains having to downscale further."

– Hilary Monk, Senior Retail Analyst

In this report we answer the key questions:

- **Can online grow further and will it damage the high street?**
- **Are free delivery and returns sustainable?**
- **How can mono-brand retailers fight back against the multi-branded operators?**
- **Can retailers capture more sales at full price by adding value?**
- **What are the international opportunities for UK footwear specialists?**

We use two streams of data from the ONS for this report – consumer spending and retail sales. The distinction is important.

- Consumer spending on footwear represents purchases of shoes through all retail channels – both specialist and non-specialist (eg clothing stores, department stores, sports shops, supermarkets, internet pure players, catalogue retailers, markets, garden centres etc.).
- The retail sales data gives us sales through footwear specialists only. According to the ONS, footwear specialists are shops that derive more than 50% of their sales from shoes.

There is a grey area between sports shoes and casual footwear although sports trainers are classified in the government's consumer spending data under the footwear rather than the sportswear category. The latter in terms of sports shoes is largely confined to specialist performance shoes such as football boots, athletic spikes or ski boots.

