

## Footwear Retailing - UK - July 2013

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*"We expect 2013 to be a year of further strong growth that will bring online footwear sales to virtually £1 billion. In the future, while online will continue to grow, as the comparatives strengthen, we expect annual growth rates to slow a little."*

– Tamara Sender, Senior Clothing Analyst

### In this report we answer the key questions:

- What is the growth potential for online footwear sales?
- Which retailers are emerging as the winners of 2013?
- To what extent has discounting impacted the footwear market?
- What demographics will drive growth in the footwear sector and how can retailers capitalise on this?

The footwear market is increasingly fragmented, with different retail sectors taking market share from the specialists. Six of the leading ten retailers are non-specialists – M&S, Sports Direct, New Look, Next, JD Sports Fashion and Primark. While Clarks' lead remains strong, it has tended to see attrition in share over the five-year review period and more focused specialists, such as Office, and more fashionable retailers, such as New Look, are likely to have chipped away at its leading position.

Clothing retailers and supermarket chains have the advantage over specialists of stocking shoes and clothes in the same store and Mintel's consumer research shows that almost one in five women tend to buy footwear from the same shops where they buy their clothes. Department stores also benefit from the wide range of footwear brands they offer under one roof.

Mintel estimates that footwear sales grew 4.8% in 2013 to £8.7 billion as consumers have continued to spend on footwear, which is seen as an easy way of updating an outfit.

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