

Footwear Retailing - UK - April 2021

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“The past year has hit the footwear sector hard and is likely to have a lasting impact. Initially, footwear, being a very seasonal fashion item, suffered big losses when stores were shut during the spring months.”

– Chana Baram, Senior Retail Analyst

This report looks at the following areas:

- The impact of COVID-19 and the third national lockdown on the footwear market.
- How consumer behaviours and attitudes have changed since COVID-19.
- What channels people use to shop for footwear and what retailers they buy from.
- Consumer behaviours around discounting.
- Incentivising shoppers to buy footwear online via convenient delivery and virtual try-on technology.

Although online shopping has been the biggest winner throughout COVID-19, 63% of footwear shoppers would feel more confident buying online if more sizing advice was available and 53% are put off by fiddly returns processes.

COVID-19, therefore, badly affected a market that at the moment is still better suited to in-store retailing. Store closures led to a sharp drop in sales and the market declined by 30% throughout the April-June 2020 quarter. Additionally, even once stores did reopen, demand for formal footwear still did not pick up as there were few occasions for dressier styles. Instead, shoppers opted for slippers to wear at home, or shoes to go for walks or partake in outdoor sports.

The biggest threats to the market have been the increase in online shopping, threatening retailers with large store portfolios, as well as the decline in consumer confidence. The market is heavily reliant on branded footwear and if people start to trade down and move away from these the category could suffer.

However, there are big opportunities within the sector. Several brands and retailers, such as Nike and Farfetch, have started to embrace online and digital innovation by introducing virtual try-on technology so shoppers can see what different items would look like when worn as well as virtual fit technology for shoppers to find out what shoe size they need. Meanwhile, Gucci and Buffalo London are taking things a step further by selling footwear that can only be worn on digital platforms. These are promising developments and show that footwear brands and retailers are able to innovate and keep up with new demands.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market

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