

Footwear Retailing: Inc Impact of COVID-19 - UK - July 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

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“The footwear sector picked up in 2019 after a tough 2018. However, the outbreak of COVID-19 in 2020 will have a significant and lasting impact on the sector. The category was previously geared towards the in-store experience, but since lockdown many of the leading retailers have announced significant numbers of store closures.”
– Chana Baram, Senior Retail Analyst

This report looks at the following areas:

What you need to know

37% of footwear shoppers still prefer to visit stores for inspiration rather than going online. This has meant that footwear has been particularly hard hit by the COVID-19 lockdown, and the sector is likely to continue suffering in the inevitable economic slowdown.

The footwear market is set to drop by a further 30% in 2020 due to COVID-19, and it is particularly susceptible to any changes in the weather so will likely bear the brunt of post-lockdown discounting, given that many shoppers will not have bothered purchasing summer footwear at full price due to a lack of holiday plans or social arrangements. Additionally, with many people worried about their finances, the category is likely to become even more polarised – which is expected to have a longer-lasting effect on sales as consumers’ trade down to lower-priced options.

Leading players have faced challenges during 2019, but COVID-19 has exacerbated these issues in 2020, with many retailers reconsidering their physical presence since fewer people are heading into shops. Clarks announced that it will drastically reduce its store estate; Shoe Zone too shut stores, Aldo’s UK arm fell into administration and Hotter entered into a CVA. With so many people still hesitant to go into stores, footwear retailers are going to have to think of ways to make the category easier to shop online.

There are opportunities to fight back, however. Mirroring trends across the retail sector, footwear retailers are looking to digitise their offerings and move away from the in-store retail concept. Some have therefore started to use innovative concepts, such as digital foot measuring apps and online size estimations, to reduce the number of returns. Footwear brands and retailers will need to really focus on offering a fantastic customer experience, whether in-store or online, with unique products to capture shoppers’ attentions, while also reassuring customers they have good hygiene practices in place.

Key issues covered in this report

- The impact of COVID-19 on consumer behaviour when shopping for footwear.
- How COVID-19 will affect the market dynamics within the footwear sector.
- Brand research on leading players within the sector and key launches and innovations.
- Consumer attitudes and shopper behaviours towards footwear.

Products covered in this Report

For the purposes of this Report, Mintel has used the following definitions:

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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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The Report looks at purchases of shoes for adults and children and uses ONS (Office for National Statistics) consumer spending data, which covers all retail channels – both specialist and non-specialist (eg clothing stores, department stores, sports shops, supermarkets, internet pure players, catalogue retailers, markets, etc.).

This Report covers the following footwear categories:

- All footwear including trainers.

Excluded from the Report:

- Specialist performance shoes (eg football boots, ballet 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 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.

COVID-19: Market context

The first COVID-19 cases were confirmed in the UK at the end of January, with a small number of cases in February. The government focused on the 'contain' stage of its strategy, with the country continuing to operate much as normal. As the case level rose, the government ordered the closure of non-essential stores on 20th March.

A wider lockdown requiring people to stay at home except for essential shopping, exercise and work 'if absolutely necessary' followed on 23rd March. Initially, a three-week timeframe was put on the measures, which was extended in mid-April for another three weeks.

The Health Protections Regulations 2020 came into effect on 15th June allowing the reopening of all non-essential stores in England as well as the mandatory use of face coverings on public transport. Pubs, restaurants, hotels and hairdressers were able to reopen on 4th July, with many beauty businesses following on 13th July.

Mintel's economic assumptions are based on the Office for Budget Responsibility's central scenario included in its July 2020 Fiscal Sustainability Report. The scenario suggests that UK GDP could fall by 12.4% in 2020, recovering by 8.7% in 2021, and that unemployment will reach 11.9% by the end of 2020, falling to 8.8% by the end of 2021. The current uncertainty means that there is wide variation on the range of forecasts however, something reflected in the OBR's own scenarios. In its upside scenario, economic activity returns to pre-COVID-19 levels by Q1 2021. The OBR's more negative scenario, by contrast, would mean that GDP doesn't recover until Q3 2024..

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Table of Contents

Overview

What you need to know
Key issues covered in this report
Products covered in this Report
COVID-19: Market context

Executive Summary

Short, medium and long-term impact of COVID-19 on footwear retailing
Figure 1: Short, medium and long-term impact of COVID-19 on footwear, July 2020

The market
Footwear was an erratic sector even prior to COVID-19
Figure 2: UK footwear sector size and forecast, 2015-25

Footwear and clothing specialists lose share
Figure 3: Estimated distribution of spending on footwear, by type of retailer, 2016-19

Unseasonable weather continued to disrupt sales
Figure 4: Year-on-year difference of UK monthly mean temperature, 2019-20

Footwear continues to experience deflation
Figure 5: Annual changes in CPIH for footwear (including repairs), 2008-19

Companies and brands
JD Sports remains the market leader
Figure 6: Estimated market shares for top 10 retailers of footwear, by value, 2017-19

Clarks is the most trusted retailer, Dr. Martens is the most innovative
Figure 7: Attitudes towards and usage of selected brands, June 2020

The consumer
Shopping local has become a higher priority
Figure 8: Changing habits since the outbreak of COVID-19, 16-22 July 2020

Women are worried about their spending power
Figure 9: Impact COVID-19 will have in the UK, by gender, 18th June - 24th June 2020

Trainers remain the most popular option
Figure 10: Styles of women's footwear purchased, Feb 2019 and May 2020

Men's footwear suffers biggest decline in number of shoppers
Figure 11: Styles of men's footwear purchased, Feb 2019 and May 2020

Trainers continue to be the most popular choice for children
Figure 12: Styles of children's footwear purchased, Feb 2019 and May 2020

Clothing stores more popular than specialists
Figure 13: Types of retailer footwear was purchased from, Feb 2019 and May 2020

There is a need for more trend-led sustainable options
Figure 14: Footwear shopper behaviour, May 2020

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Consumers have become accustomed to discounting

Figure 15: Consumer journey for footwear purchasing, May 2020

Price, quality and comfort are most important when choosing children's styles

Figure 16: Factors prioritised when choosing children's footwear, May 2020

Shoppers value trusted retailers

Figure 17: Attitudes towards shopping for children's footwear, May 2020

What we think

The Impact of COVID-19 on Footwear Retailing

The Market

COVID-19 has caused big declines in the footwear sector

Store closures hamper market recovery

COVID-19 has impacted the supply chain

Children's footwear experiences smaller declines

Retail parks predicted to outperform other destinations as shops reopen

Interest in sports has endured

Retailers concentrate on online

People are still nervous to try on items in-store

Children's footwear adapts to an appointment model

COVID-19 has led to new ways of shopping online

Home measuring for children's footwear

Many say their financial situation has worsened

Companies and Brands

Clarks continues with turnaround strategy

A wave of administrations and store closures

Amazon attracts new brands since COVID-19

Social media used to increase brand awareness

There are opportunities in livestreaming

Retailers and brands are upping their charitable efforts

Online shopping becomes a must due to COVID-19

Over a third of shoppers still expect to spend less on fashion items

Fewer people have been purchasing footwear

Discounting likely to impact the market

Issues and Insights

Further opportunities emerge online due to COVID-19

The facts

The implications

Social media and apps utilised to raise brand awareness

Figure 18: Simona Halep challenges users of Nike's Training Club app to do a diagonal shuffle from her Instagram account, 2020

Figure 19: Mollie Tuggle's Dr. Martens colouring book, 2020

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More brands turn to livestreaming
Charitable work and giving back have presented opportunities
The facts
The implications
Figure 20: Kurt Geiger NHS products, 2020
Opportunities in children's footwear
The facts
The implications

The Market – What You Need to Know

COVID-19 has caused big declines in the footwear sector
Store closures hamper market recovery
Children's footwear experiences smaller declines
Footwear and clothing specialists lose share
Unseasonable weather continues to disrupt sales
Footwear continues to experience deflation

Market Size and Forecast

Short, medium and long-term impact on the footwear industry
Figure 21: Short, Medium and long-term impact of COVID-19 on footwear, July 2020
Lockdown
Re-emergence
Recovery
COVID-19 has caused big declines in the footwear sector
Figure 22: UK footwear sector size and forecast, 2015-25
Footwear forecast
Footwear is less suited to online retailing
Store closures
Impact on the supply chain
Sports styles expected to do well
Figure 23: UK footwear sales, at current prices, 2015-25
Learnings from the last recession
Figure 24: UK footwear sales, at current prices, 2007-13
Share of the market by women, men and children's footwear
Figure 25: UK footwear sales, segmented by market value and percentage share, 2015-20
Figure 26: UK footwear sales, segmented by women's, men's and children's, % share, 2017-20

Channels to Market

Footwear and clothing specialists lose share
Figure 27: Estimated distribution of spending on footwear, by type of retailer, 2016-19
Specialist chains struggle during COVID-19 lockdown

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Figure 28: Estimated distribution of spending on footwear, by type of retailer, 2016-19

Market Drivers

COVID-19 causes stores to shut

Figure 29: Year-on-year footfall change, by location, 2015-20

Reliance on online retail increases

Figure 30: Internet sales as a percentage of total retail sales, 2007-19

Interest in sports has endured

Figure 31: People's priorities around exercise since COVID-19, 16th April -14th May 2020

Unseasonable weather continues to disrupt sales

Figure 32: Year-on-year difference of UK monthly mean temperature, 2019-20

Number of school-age children set to decline

Figure 33: Projected year-on-year percentage population change, based on 2018 projections, by age at last birthday, 2015-24

Figure 34: Projected (2018-based projections) UK population at mid-years, by age at last birthday, 2015-24

Many say their financial situation has worsened...

Figure 35: Change to people's finances in the UK since COVID-19, 16 - 22 July 2020

...leading to a decrease in discretionary spend

Figure 36: Trends in activities people are considering over the next three months, May 2019 and May 2020

Footwear continues to experience deflation

Figure 37: Annual changes in CPIH for footwear (including repairs), 2008-19

Clothing, footwear and underwear experience steepest declines

Figure 38: Trends in fashion purchases over a three month period, June 2019 and June 2020

Companies and Brands – What You Need to Know

Clarks continues with turnaround strategy

Aldo enters administration and Hotter applies for a CVA

JD Sports remains the market leader

Online sales of footwear continue to increase

Total advertising expenditure down year-on-year in 2019

Leading Footwear Retailers

Leading footwear retailers record declines

Clarks accelerates turnaround strategy

Shoe Zone expansion and digital investment

Figure 39: Leading footwear specialists: UK revenues, 2015-19

Aldo files for bankruptcy protection amid COVID-19 pandemic

Schuh rolls out Gen Z shopper-inspired designs and exits Germany

Figure 40: Schuh's new branding, 2020

Footwear chains reduce store numbers

Hotter enters into a CVA

LK Bennett shuts stores

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Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 41: Leading footwear specialists: UK outlet numbers, 2015-19

Deichmann-Shoes UK store expansion

Office mulls store closures after steep fall in profits

Sales per outlet

Foot Locker's immersive Power Store concept helps drive footfall

Figure 42: Leading footwear specialists: estimated UK sales per outlet, 2015-19

Operating profit

Figure 43: Leading footwear specialists: UK operating profits, 2015-19

Footasylum swings to a pre-tax loss on the back of low footfall

Department store concessions dent Dune sales and profits

Product diversification and ecommerce drive profits at Kurt Geiger

Leading Non-Specialists

JD Sports fashion revenue surges on back of athleisure trend

Figure 44: Leading non-specialist retailers: estimated footwear sales (excluding VAT), 2015-19

Sports Direct is a potential bidder for footwear specialist Office

Marks & Spencer and New Look jump on vegan-friendly bandwagon

Budget-priced designer shoe look-a-likes help drive Primark sales

Big name footwear brands quit Amazon

Figure 45: Leading non-specialist retailers: positioning, offer and brands stocked, 2020

Market Share

Sports fashion retailers are market leaders

Figure 46: Estimated market shares for top 10 retailers of footwear, by value, 2017-19

Figure 47: Estimated market shares for top 20 footwear retailers, by value, 2017-19

Online

Online sales of footwear continue to grow

Figure 48: Estimated online sales of footwear, 2015-19

COVID-19 has led to new ways of shopping online

Artificial intelligence used to measure feet

Figure 49: Nike Fit in use, 2019

Home measuring for children's footwear

Figure 50: John Lewis' guide for measuring children's footwear, 2020

Figure 51: Start-Rite children's foot measuring gauge, 2020

Distribution

Figure 52: Estimated distribution of online sales, 2015-19

Big brands ditch Amazon

Launch Activity and Innovation

Re-imagining the in-store experience

adidas' most digital store to date

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Figure 53: Inside the adidas LDN store, 2019

Timberland's eco-focused shop concept

Figure 54: Timberland's new purpose-led flagship store, 2019

Vans new boutique and flagship London stores

Figure 55: Vans store boutique in Covent Garden, 2019

Steve Madden opens its first UK flagship store

Made-to-order

Shoenvious launches in the UK

Figure 56: Customisable shoes by Shoenvious, 2019

New Balance teams up with Unmade

Figure 57: New Balance x Unmade customisable trainers, 2019

Hotter introduces bespoke fitted shoes

Footwear brands explore new market opportunities

Roger Vivier launches jewellery collection

Figure 58: Roger Vivier branches out into jewellery, 2019

Jimmy Choo debuts cosmetics range

Bridging the gap between online and in-store footwear shopping

Conversational commerce gives online footwear shoppers more confidence

Sneakrs app offers users the chance to shop for the latest releases

Eco-friendly footwear

Asics launches recycled footwear

Figure 59: Asics Edo Era Tribute Pack sustainable footwear, 2020

Allbirds releases high performance shoes

Aldo showcases its first sustainable collection

Figure 60: Aldo's new RPPL sustainable range, 2019

Veja opens standalone store in Paris

Reformation creates sustainable 'dad sneakers' with New Balance

Vegan footwear gaining traction

Figure 61: Reebok's plant-based Forever Floatride Grow running shoe, 2019

New footwear inspired by gardening and medical professionals

Figure 62: Adidas Gardening Club range campaign, featuring Alan Titchmarsh, 2019

Comfort and style

Shoes in support of charity

Limited editions, collaborations and out-of-the-box partnerships

Nike teams up with Ben & Jerry's

Figure 63: Nike SB 'Dunk Low Pro Ben & Jerry's' style, 2020

Skechers collaborates with Goodyear

Dr. Martens launches second Sex Pistols collection

Figure 64: Dr. Martens 'The Filth and the Fury' boot, 2020

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Crocs partners with KFC

Figure 65: Crocs Finger Lickin' Good shoes, 2020

Cartoon collaborations

Figure 66: Disney x ALDO: Lunar New Year Collection, 2019

Clarks ramps up number of collaborations

Advertising and Marketing Activity

Total advertising expenditure down 19% year-on-year in 2019

Figure 67: Total above-the-line online display and direct mail advertising expenditure on footwear, 2016-19

Skechers is the sector's biggest advertising spender

Figure 68: Total recorded above-the-line, online display and direct mail total advertising expenditure on footwear, by leading advertisers, 2016 - 2019

Campaign highlights

TV celebrity fronts adidas gardening-themed footwear collection campaign

Clarks' autumn/winter 2019 campaign focuses on 'comfort in every situation'

Hotter Shoes showcase SS19 collection

Converse celebrates iconic Chuck Taylor sneakers

30% of total advertising expenditure channelled through digital

Figure 69: Total above-the-line online display and direct mail advertising expenditure on footwear, by media type, 2019

Leading advertisers' spend by media type

Figure 70: Leading advertisers' total recorded above-the-line, online display and direct mail total advertising expenditure on footwear, by media type, 2019

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 71: Attitudes towards and usage of selected brands, June 2020

Key brand metrics

Figure 72: Key metrics for selected brands, June 2020

Brand attitudes: Clarks has great customer service and Shoezone offers good value

Figure 73: Attitudes, by brand, June 2020

Brand personality: Dr. Martens and Skechers are fun brands

Figure 74: Brand personality – macro image, June 2020

Brand personality: Dune and Kurt Geiger perceived as aspirational but also overrated

Figure 75: Brand personality – micro image, June 2020

Brand analysis

Clarks trustworthy and highly recommended by those who have used the brand

Figure 76: User profile of Clarks, June 2020

Skechers a fun and somewhat unique, innovative brand

Figure 77: User profile of Skechers, June 2020

Dr. Martens cutting edge and stylish

Figure 78: User profile of Dr. Martens, June 2020

Kurt Geiger exclusive and aspirational

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Figure 79: User profile of Kurt Geiger, June 2020

Dune suffers from low brand awareness

Figure 80: User profile of Dune, June 2020

Shoe Zone basic and boring, but good value

Figure 81: User profile of Shoe Zone, June 2020

The Consumer – What You Need to Know

Online shopping becomes a must due to COVID-19

Fewer people have been purchasing footwear

Clothing stores more popular than specialists

Young shoppers want buy now, pay later options

Consumers have become accustomed to discounting

Shifts in Consumer Behaviour since COVID-19

Appetite for online shopping has increased

Figure 82: Changing habits since the outbreak of COVID-19, 16- 22 July 2020

Over a third of shoppers still expect to spend less on fashion items

Figure 83: Expected spending patterns due to COVID-19, 16 – 22 July 2020

Shopping local has become a higher priority

Many feel uncomfortable trying footwear on in-store

Figure 84: How comfortable people think they will be doing everyday activities, 16-22 July 2020

Parents with young children cut back on non-essential spending

Figure 85: People who will be cutting back on non-essential spending since COVID-19, by children in household, 18 - 24 June 2020

Women are more worried about the financial implications of COVID-19

Figure 86: Impact COVID-19 will have in the UK, by gender, 18 – 24 June 2020

Types of Footwear Bought

COVID-19 leads to fewer footwear sales

Figure 87: Number of people who purchased footwear, across categories, Feb 2019 and May 2020

Comfortable styles prove most popular among women...

Figure 88: Styles of women's footwear purchased, Feb 2019 and May 2020

...particularly among younger age groups

Figure 89: Women's trainers and slides purchased, by age group, May 2020

Fewer people have bought men's trainers...

Figure 90: Styles of men's footwear purchased, Feb 2019 and May 2020

...but the style continues to be a popular gifting option

Figure 91: Trainers purchased, by gender of purchaser, May 2020

Men buy fewer styles than women

Figure 92: Repertoire of styles purchased, by gender, May 2020

Types of Children's Footwear Bought

Trainers continue to be the most popular choice

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Figure 93: Styles of children's footwear purchased, Feb 2019 and May 2020

Figure 94: Nike Adventure Club subscription, 2019

Children's footwear less prevalent in older age groups

Figure 95: Repertoire of children's footwear purchased, by age of children in household, May 2020

Where Footwear is Bought

Increasing numbers shopped for footwear online

Figure 96: Channels used for footwear purchasing, May 2020

Younger people shop footwear online via smartphones

Figure 97: Channels used for footwear purchasing, by age group, May 2020

Clothing stores overtake specialists

Figure 98: Types of retailer footwear was purchased from, Feb 2019 and May 2020

Sports Direct remains the most popular footwear retailer

Figure 99: Retailers footwear has been purchased from, Feb 2019 and May 2020

Women are far more likely to shop around

Figure 100: Repertoire of retailers used for footwear, by gender, May 2020

Behaviour towards Footwear

More trend-led sustainable options are required

Figure 101: Footwear shopper behaviour, May 2020

A third think vegan footwear is always sustainable

Figure 102: adidas vegan Samba shoe, 2020

Younger shoppers are drawn towards credit options

Figure 103: Footwear shoppers who selected yes to behaviours around credit, May 2020

Figure 104: Klarna available in-store with Schuh, 2019

Deciding what Footwear to Buy

Consumers are accustomed to discounting

Figure 105: Consumer journey for footwear purchasing, May 2020

Stores remain important for style inspiration

Female shoppers research styles but men research quality

Figure 106: Consumer journey for footwear purchasing, by gender, May 2020

Younger shoppers read online reviews

Figure 107: Consumers who used online reviews when shopping for footwear, by age group, May 2020

Purchase Drivers when Buying Children's Footwear

Price, quality, and comfort are of utmost importance

Figure 108: Factors prioritised when choosing children's footwear, May 2020

AB consumers most likely to care about experience and the environment

Figure 109: Factors prioritised when choosing children's footwear, by socio-economic status, May 2020

Attitudes towards Children's Footwear

Shoppers value trusted retailers

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Figure 110: Attitudes towards shopping for children’s footwear, May 2020

Customer service needs to extend to those with diverse needs

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

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