

## Footwear Retailing - Europe - April 2019

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“Demand for footwear has grown almost everywhere in the last five years, but unlike in so many other retail sectors, the footwear specialists, and certainly the larger multiples, have been able to broadly maintain their share of sales.

Many of them have expanded their own online propositions, expanded their store bases and been able to meet the online challenge head on.”

**- Richard Perks, Director of Retail Research**

This report looks at the following areas:

This report series covers the footwear market in the five largest Western European countries – the UK, France, Germany, Italy and Spain. The focus of the reports is on the footwear specialists. The store based non-specialists, such as department stores, are not covered in detail although they are looked at briefly in the Channels of Distribution sections and also in our consumer research. But the report does look more closely at the impact of online in the sector and the major online players.

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### DID YOU KNOW?

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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Value of the footwear market in the UK remains unmoved in 2018

Women's and children's shares of the footwear market grow.

Footwear specialists and clothing retailers continue to struggle

Unseasonable weather affected 2018 footwear sales

Bad year for department stores

People concerned about Brexit

Market size and forecast

Value of the footwear market in the UK remains stagnant in 2018

Figure 139: UK footwear sales, best- and worst-case forecast, 2013-23

Footwear forecast

Figure 140: UK footwear sales, at current and 2018 prices, 2013-23

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## Uncertainty surrounding Brexit

### Women's and children's shares of the footwear market grow

Figure 141: UK footwear sales, segmented by market value and percentage share, 2016-18

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Figure 144: Estimated distribution of spending on footwear, by type of retailer, 2015-18

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### Clarks continues to struggle

### LK Bennett goes into administration

### JD Sports buys Footasylum

### Online footwear sales reached £2.3 billion in 2018

### Footwear advertising expenditure increases 40% in 2018

### Multi-brand retailers struggle to differentiate themselves

### Leading footwear retailers

### Leading specialists struggle

### Clarks sales and profits decline

### LK Bennett goes into administration

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Figure 154: Leading footwear specialists: UK revenues, 2014-18

Kurt Geiger head office shake-up amid expansion plans

Over-reliance on department stores hits specialists

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Figure 155: Leading footwear specialists: UK outlet numbers, 2014-18

Dune focuses on international expansion

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Online footwear sales reached £2.3 billion in 2018

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### ASICS x Vivienne Westwood

Figure 168: ASICS x Vivienne Westwood collection, 2019

### GZ x Rita Ora

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Figure 169: Mytheresa's exclusive collection with Tod's, 2018

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Skechers advert courts controversy

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Clarks back-to-school campaign

Dune: Clothes are overrated

Figure 178: Dune London's 'Clothes are Overrated' campaign, 2019

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Foot Locker struggles to differentiate itself

Figure 187: User profile of Foot Locker, March 2019

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Trainers are the most popular style across all categories

More people shop online for footwear

Sports Direct remains the most popular retailer for footwear

Quality is the most important factor when choosing a retailer

People buy footwear out of necessity

The opportunity in non-leather shoes

Types of footwear bought

Heeled styles prove to be least popular

Figure 188: Styles of women's footwear purchased, February 2019

Trainers are the most popular style across all categories...

Figure 189: Styles of men's footwear purchased, February 2019

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...and are also the style most likely to be bought for others

Women are most likely to buy footwear for others

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Figure 193: Styles of children's footwear purchased, February 2019

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Quality is the most important factor when choosing a retailer

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Figure 206: Kurt Geiger's Rita boot in pink, 2019

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Figure 208: Repertoire of reasons used for purchasing footwear, by gender, February 2019

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### Consumer research methodology

### Appendix – Market size and forecast

### Forecast methodology

Figure 216: UK footwear sales, best- and worst-case forecast, 2018-23

## C&J Clark

### What we think

Brings in former Geox boss as chief executive

UK manufacturing a missed opportunity in maintaining brand heritage

Creates single stock pool to boost online sales

New store design to continue rollout?

Launches children's literacy skills initiative

### Company background

### Company performance

Figure 217: C&J Clark (UK and ROI): group financial performance, 2013/14-2017/18

Figure 218: C&J Clark (UK and ROI): outlet data, 2013/14-2017/18

### Retail offering

## Deichmann Schuh

### What we think

Filling in gaps in European network

Continues with growth of smaller formats

Franchise move could show way ahead in Balkans and Eastern Europe

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Pursues younger consumers

Company background

Company performance

Figure 219: Deichmann Schuh: group financial performance, 2013-18

Figure 220: Deichmann Schuh: outlet data, 2013-18

Retail offering

### Eram

What we think

Major restructuring of store network

Multiple brands offer chance to shift focus

Focusing on personalisation to engage customers

Uses availability of stock across branches for e-commerce sales

Company background

Company performance

Figure 221: Eram: Group sales performance, 2014-18

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Company background

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Retail offering

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Merges clothing and footwear fascias

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Company background

Company performance

Figure 226: Vivarte: group sales performance (excl. VAT), 2013/14-2017/18

Figure 227: Vivarte: approximate footwear store numbers, 2015/16-2017/18

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