

Findings Report 2019

# ONLINE VS. IN-STORE FOOTWEAR SHOPPING TRENDS



Welcome to the inaugural Footwear Shopping Survey commissioned by Red Door Interactive.

Our objective for this research is to better understand the behaviors and preferences of consumers in a retail landscape under constant transformation by digital technology. Specifically, we are seeking to answer a seemingly simple question:

“Why do people shop where they shop?”



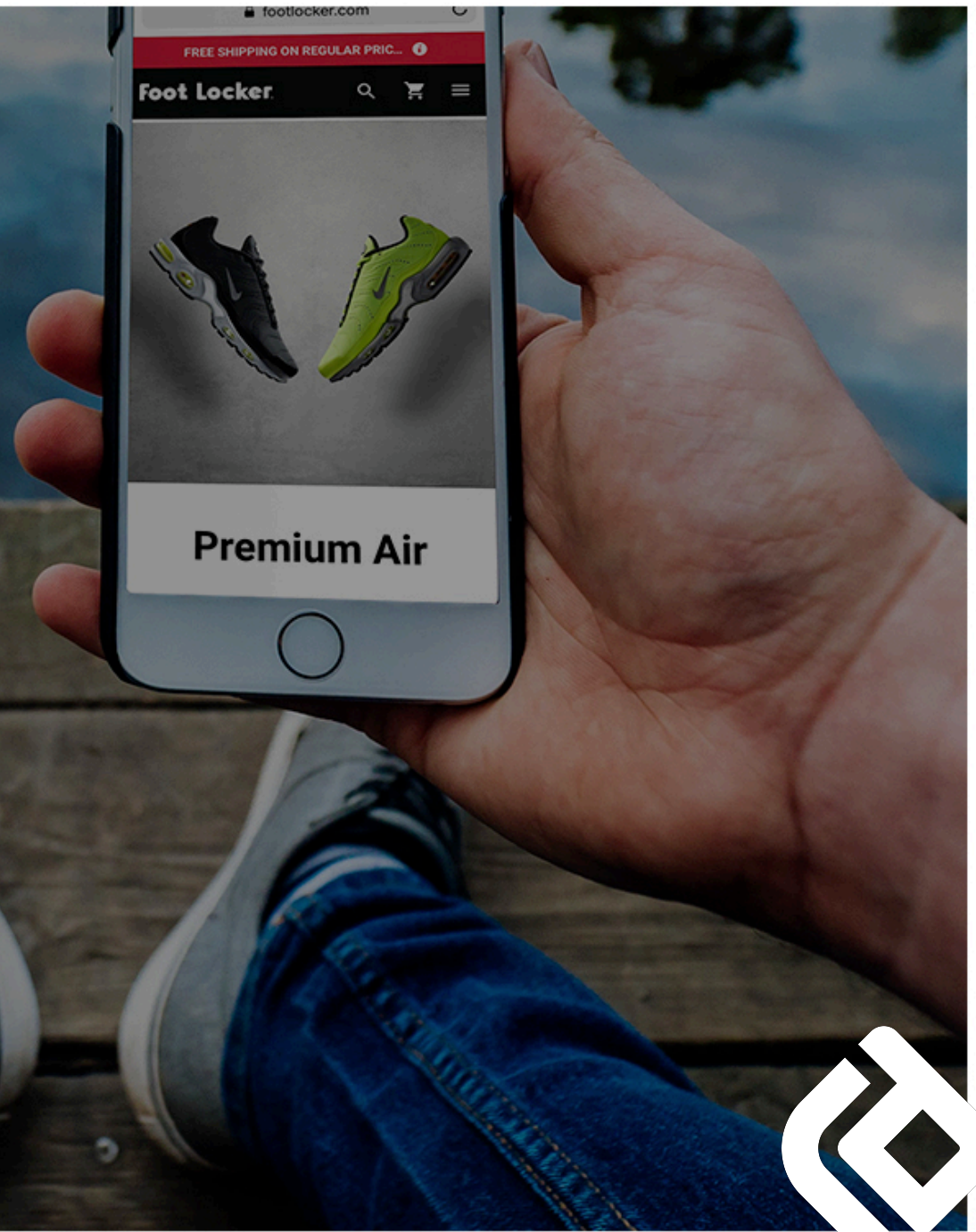
The insights revealed in this research are especially valuable to marketers who need to identify the best channels on which to distribute their products, both online and offline, and where to make strategic investments (or not). Decisions about the downsizing and closure of brick-and-mortar stores, the perceived “death of the shopping mall,” and the recalibration of the shopping experience toward delivery services, are topics marketers grapple with daily. Not to mention figuring out the Amazon.com part of the equation.

As such, we are excited to share our Footwear Shopping Trends 2019 Findings Report.



Footwear Shopping Trends 2019

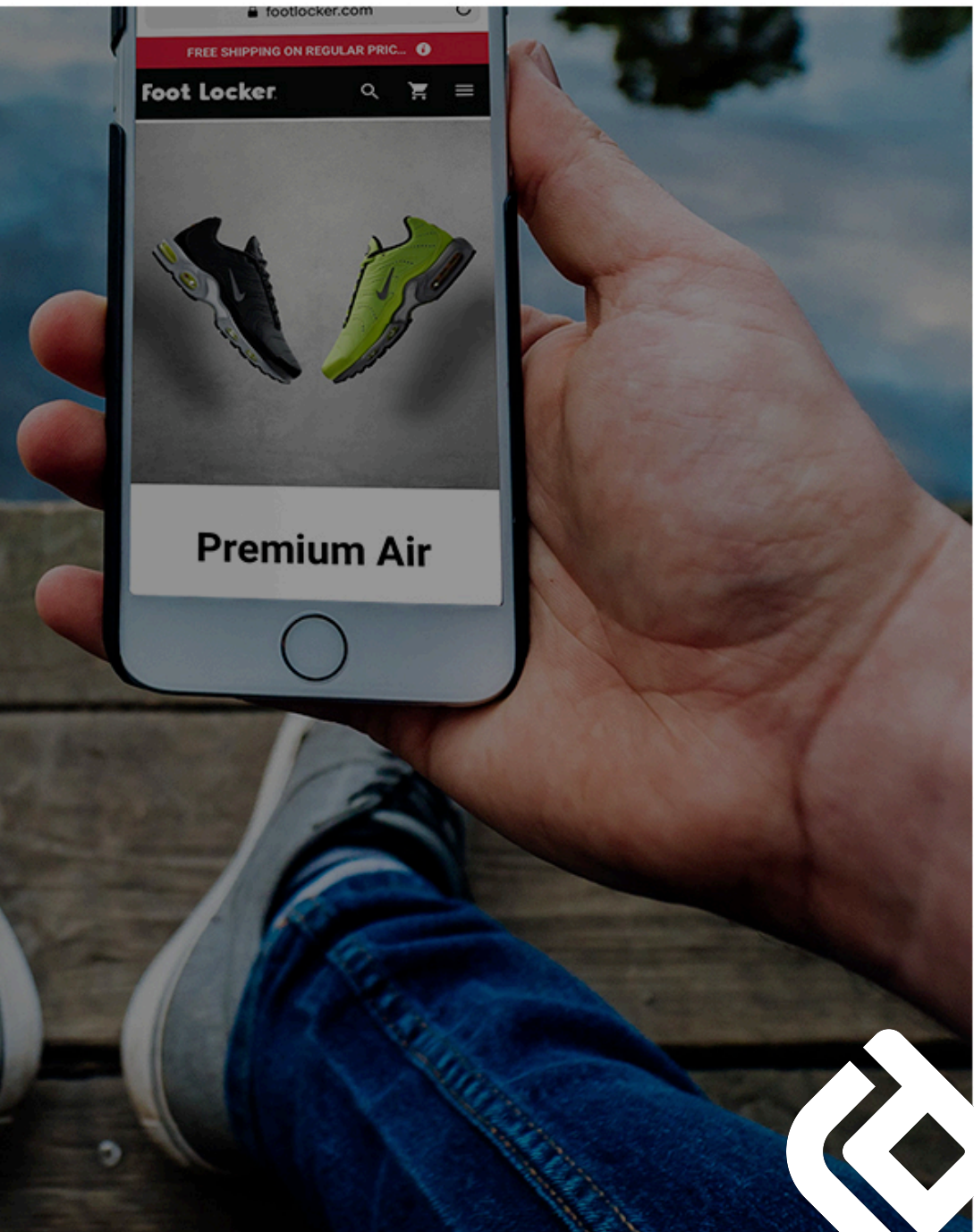
# METHODOLOGY



We fielded an online survey via SurveyMonkey between September 10-12, 2018, and data was collected from a random sampling of 300 people ages 18-65 in the United States. SurveyMonkey provided respondents.

In addition to the survey data, proprietary research from the world's leading third-party providers helped to inform and validate our findings at a larger scale. Samples of the reports we referenced include:

- Activewear US 2018 (Gartner L2 Digital IQ Index)
- Apparel Stores and Digital Commerce: Trends and Benchmarks (eMarketer)
- What's Working in Clothing and Apparel (WARC)

**Gartner**L2 eMarketer**WARC**



# SUMMARY OF RESEARCH FINDINGS



# DATA ANALYSIS & COMMENTARY





01

Amazon.com & digital marketing channels lead shoppers' footwear product discovery.



02

More footwear shoppers buy offline but the influence of e-commerce is on the upswing.



03

Concerns about finding the right fit most influence where footwear shoppers choose to buy.



04

Footwear shoppers want e-commerce websites with omnichannel capabilities.



05

Amazon.com encourages footwear shoppers to find a lower price.



06

Analysis of the e-commerce landscape shows footwear retailer site traffic struggling to keep pace with past levels.



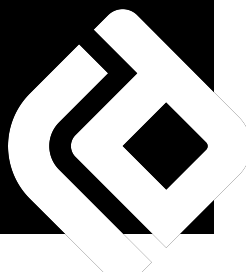
07

Retailers can utilize video content, reviews, & augmented reality to improve the digital shopping experience.



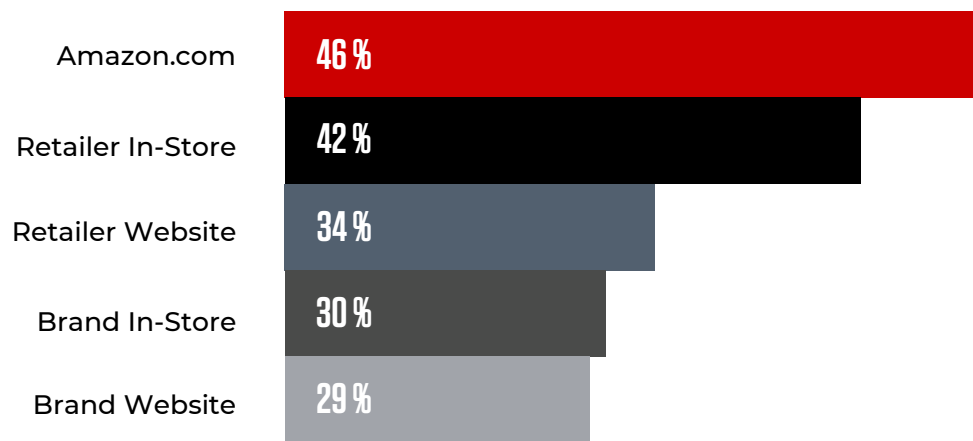
01

Amazon.com & digital  
marketing channels lead  
footwear product discovery.

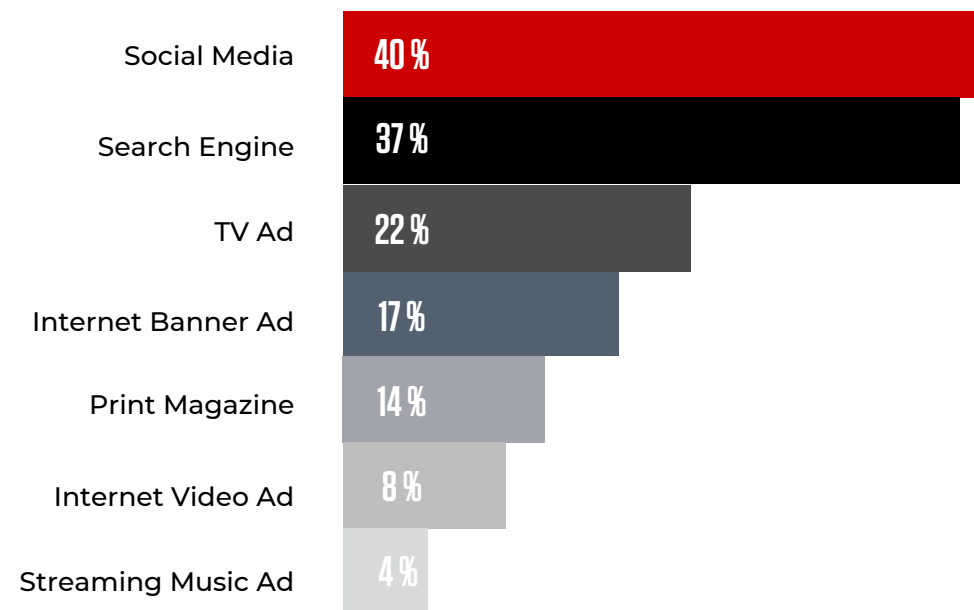


**Amazon.com & digital marketing channels lead footwear product discovery.**

**SHOPPING LOCATIONS**



**MARKETING CHANNELS**



Which of the following sources has aided in your discovery of new footwear in the last 12 months?

01

## Amazon.com & digital marketing channels lead footwear product discovery.

01

Nearly half of shoppers surveyed discover new footwear on Amazon.com (46%), outpacing the average number who find footwear on retailer and brand websites (32%), and the average of brick-and-mortar locations (36%). Marketers have taken notice by increasing their Amazon spend to \$4.61B, a 145% increase from last year<sup>1</sup>.

**144%**

increase in Amazon spend among marketers  
(*\$1.88B to \$4.1B in 2018*)

### HOW SHOPPERS DISCOVER NEW FOOTWEAR

**46%**

Amazon.com

**32%**Retailer & Brand  
Websites**36%**Brick-and-Mortar  
Locations

<sup>1</sup>eMarketer, September 2018, [www.emarketer.com](http://www.emarketer.com)

01

## Amazon.com & digital marketing channels lead footwear product discovery.

### 02

Almost twice as many footwear shoppers discover new products on social media (40%), eclipsing awareness from TV (22%) and print magazines (14%). As the numbers show, online exposure is critical to building mental availability (i.e., when people are thinking about buying new shoes, do they think of your brand?)

### HOW SHOPPERS DISCOVER NEW FOOTWEAR

**40%**Social  
Media**22%**

Television

**14%**Print  
Magazines

01

## Amazon.com & digital marketing channels lead footwear product discovery.

03

Internet video and streaming music ads contributed to just 12% of footwear product discovery, potentially underscoring a nascent opportunity. By 2020, digital audio ad spending is forecasted to rise to \$4.1B compared to \$2.9B in 2018<sup>2</sup>.



# \$4.1B

Forecasted digital audio ad spending in 2020  
(*\$2.9B in 2018*)

### HOW SHOPPERS DISCOVER NEW FOOTWEAR



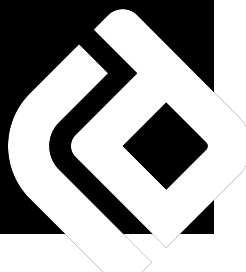
# 12%

Internet video and  
streaming music ads

<sup>2</sup>Jack Myers TomorrowToday, "2000-2020, Shopping Marketing and Trade Communication Data and Forecasts," March 2018, as cited by eMarketer, [www.emarketer.com](http://www.emarketer.com)

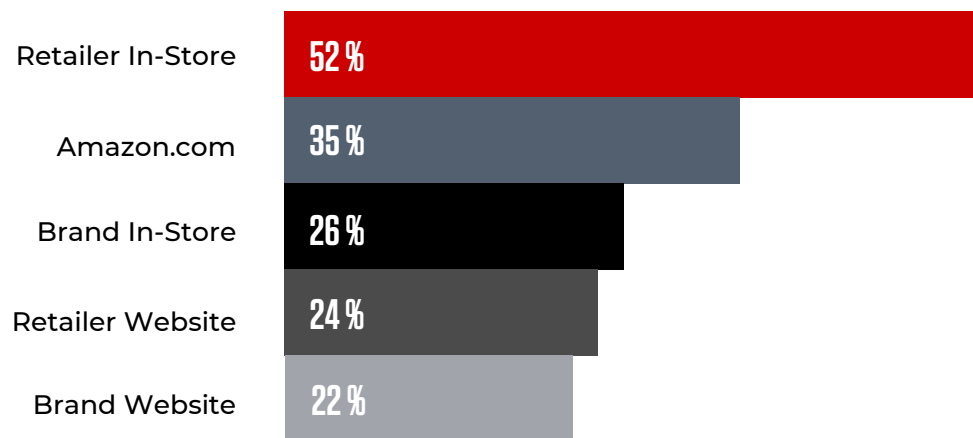
02

More footwear shoppers buy offline but the influence of e-commerce is on the upswing.

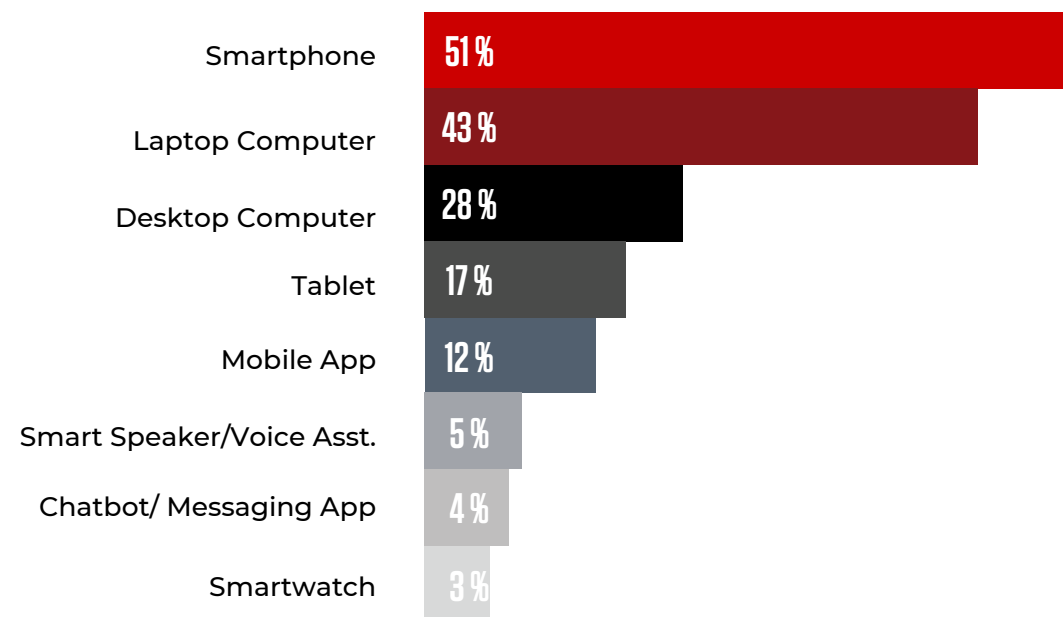


**More footwear shoppers buy offline but the influence of e-commerce is on the upswing.**

**SHOPPING LOCATIONS**



**DEVICES & APPS**



Where have you purchased footwear in the last 12 months?

## More footwear shoppers buy offline but the influence of e-commerce is on the upswing.

### 01

More than half of survey respondents indicated they make footwear purchases in retailer brick-and-mortar locations (52%) compared to retailer websites (24%) and brand websites (22%).

### WHERE SHOPPERS MAKE FOOTWEAR PURCHASES



**52%**

Brick-and-Mortar Locations



**24%**

Retailer Websites



**22%**

Brand Websites

## More footwear shoppers buy offline but the influence of e-commerce is on the upswing.

### 02

When purchasing footwear online, more shoppers buy on Amazon.com (35%) compared to retailer websites (24%) and brand websites (22%), illustrating the need for brand visibility and availability on Amazon.

### WHERE SHOPPERS PURCHASE ONLINE



35%

Amazon.com



24%

Retailer  
Websites



22%

Brand  
Websites

02

## More footwear shoppers buy offline but the influence of e-commerce is on the upswing.

### 03

Just over half of footwear shoppers buy on smartphones (51%), making mobile optimization a marketing imperative.

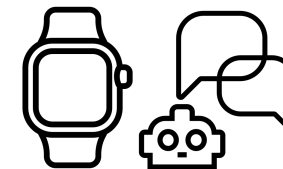
### 04

While chatbots, messaging apps, voice assistants, and smartwatches receive a lot of industry buzz, only 12% of shoppers reported purchasing footwear through those technologies (a trend to monitor as consumer habits shift and tech matures). According to a 2018 Narvar study<sup>3</sup>, 51% of shoppers used voice assistants to research products, 36% added products to a shopping list, and 22% made a purchase.

### FOOTWEAR PURCHASES ON DEVICE

**51%**

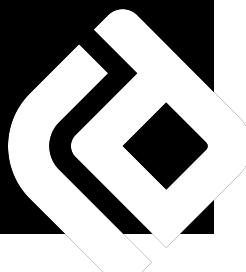
Smartphones

**12%**Chatbots  
Messaging Apps  
Voice Assistants  
Smartwatches

<sup>3</sup>Narvar, "Connecting with Shoppers in the Age of Choice", April 2018

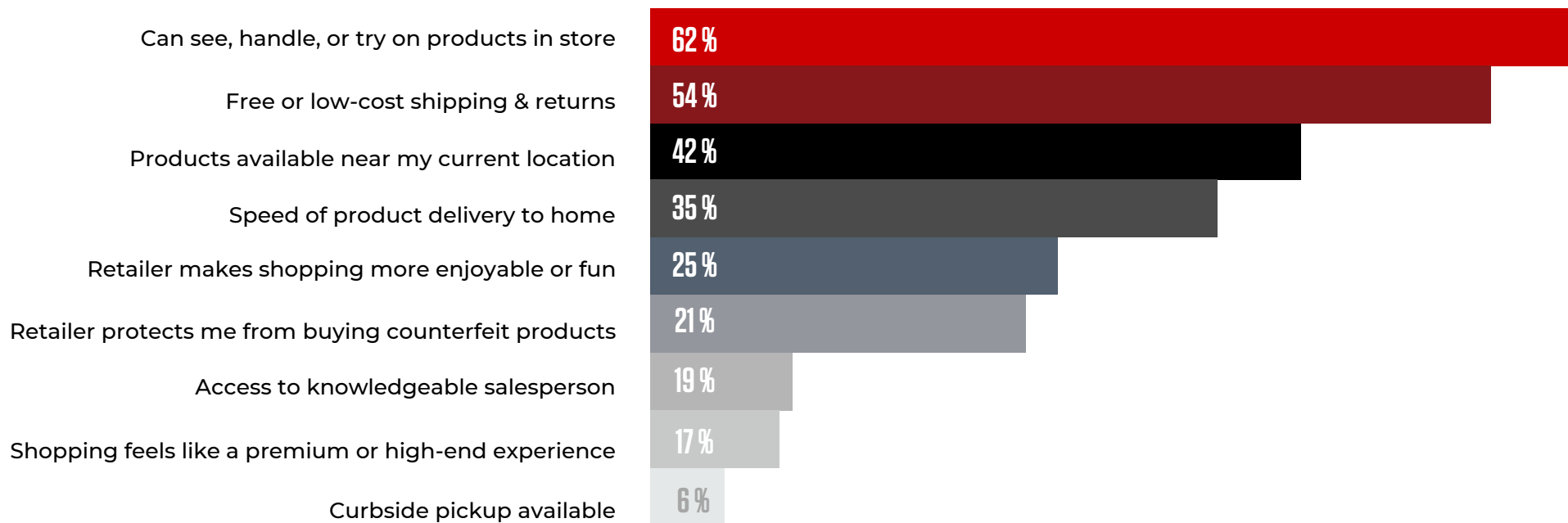
03

Concerns about finding the right fit most influence where footwear shoppers choose to buy.



**Concerns about finding the right fit most influence where footwear shoppers choose to buy.**

**SHOPPERS' REASON FOR LOCATION SELECTION**



Which of the following factors will most likely influence where you purchase footwear next?

**Concerns about finding the right fit most influence where footwear shoppers choose to buy.**

**01**

Well over half the survey respondents indicated a need to see, handle, or try on footwear products in store (62%) and expect availability near their current location (42%).

**02**

Even though footwear shoppers prefer to buy online, just 19% cite the influence of salespeople in making a purchase decision, likely because so much discovery and research occurs online before visiting in-store locations.

SHOPPERS' REASON FOR LOCATION SELECTION



**62%**

See, handle, or try on products in store



**42%**

Expect availability near their current location

**19%**

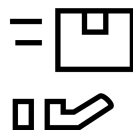
*Are influenced by salespeople in making purchase decision*

## Concerns about finding the right fit most influence where footwear shoppers choose to buy.

### 03

In situations where products end up not fitting, footwear shoppers expect free or low-cost shipping and returns (55%) and simple return policies (47%), so retailers who offer these programs are better suited to earn more repeat business.

#### EXPECTATIONS ON SHIPPING & RETURN POLICIES



**55%**

Free or low-cost shipping and returns

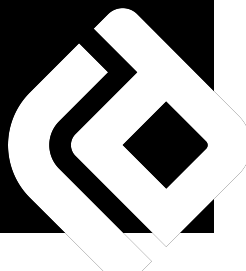


**47%**

Simple return policies

04

Footwear shoppers expect e-commerce websites to have omnichannel capabilities.



**Footwear shoppers expect e-commerce websites to have omnichannel capabilities.**

**WEBSITE FEATURES THAT INFLUENCE PURCHASE DECISION**



Which of the following features have influenced your decision to purchase footwear in the last 12 months?

## Footwear shoppers expect e-commerce websites to have omnichannel capabilities.

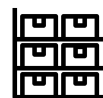
### 01

A top chosen website feature for influencing footwear purchases is to see local store inventory (34%), which aligns with consumer preference to buy offline in this category.

### 02

The most chosen website features for influencing footwear include: ratings and reviews (34%), fast page load speeds (28%), product videos (21%), and alternative payment methods like PayPal or iPay (19%). Marketers should view these features as essential to remain competitive.

### SHOPPERS' TOP WEBSITE FEATURES



34%

See local store inventory



34%

Ratings & reviews



28%

Fast page load speeds



21%

Product videos



19%

Alt. payment methods like PayPal or iPay

## Footwear shoppers expect e-commerce websites to have omnichannel capabilities.

### 03

Survey respondents did not indicate they are influenced as much by interactive website features like shoe customization tools (15%), or a guided shoe finder quiz (11%), even though research<sup>1</sup> shows these features are growing in popularity—especially for Gen Z consumers who prioritize uniqueness.

### LESS INFLUENTIAL WEBSITE FEATURES



15%

Shoe customization tools



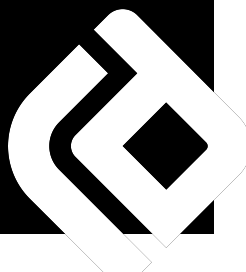
11%

Guided shoe finder quiz

<sup>1</sup>YouGov, “Made to Order: An analysis of US consumer perception towards personalization,” June 2018, as cited by eMarketer, [www.emarketer.com](http://www.emarketer.com)

05

Amazon.com has a growing presence where shoppers research and purchase footwear online.



**Amazon.com has a growing presence where shoppers research and purchase footwear online.**

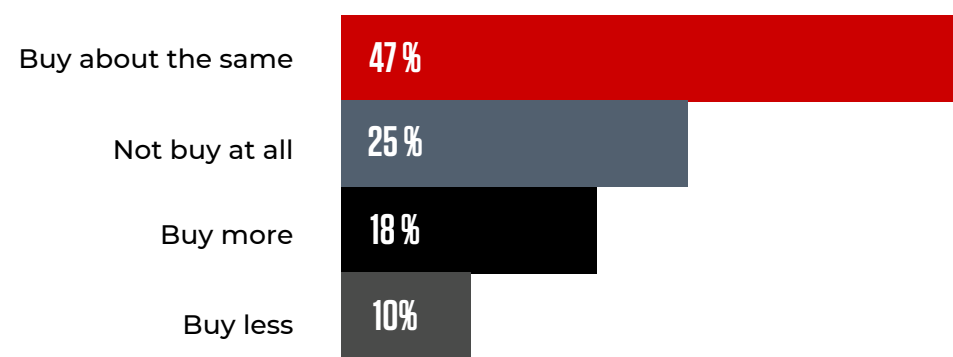
**SHOPPED FOOTWEAR ON AMAZON.COM**

Last 12 Months



**PLAN TO SHOP FOOTWEAR ON AMAZON.COM**

Next 12 Months



Have you shopped for footwear on Amazon.com in the last 12 months? How much footwear will you buy on Amazon.com in the next 12 months?

## Amazon.com has a growing presence where shoppers research and purchase footwear online.

### 01

Well over half of the survey respondents purchased footwear on Amazon.com (59%).

### 02

In the next 12 months, 65% of shoppers surveyed intend to buy more footwear or about the same amount on Amazon.com, increasing competition with other channels.

### 03

Now is the time for footwear marketers to have an Amazon strategy (even if it means not selling on Amazon).

### AMAZON.COM SHOPPING TRENDS



**59%**

Purchased  
footwear from  
Amazon.com

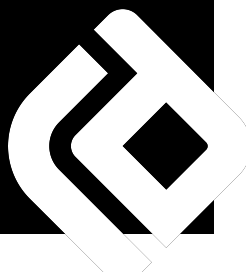


**65%**

Intend to buy  
more footwear  
from  
Amazon.com

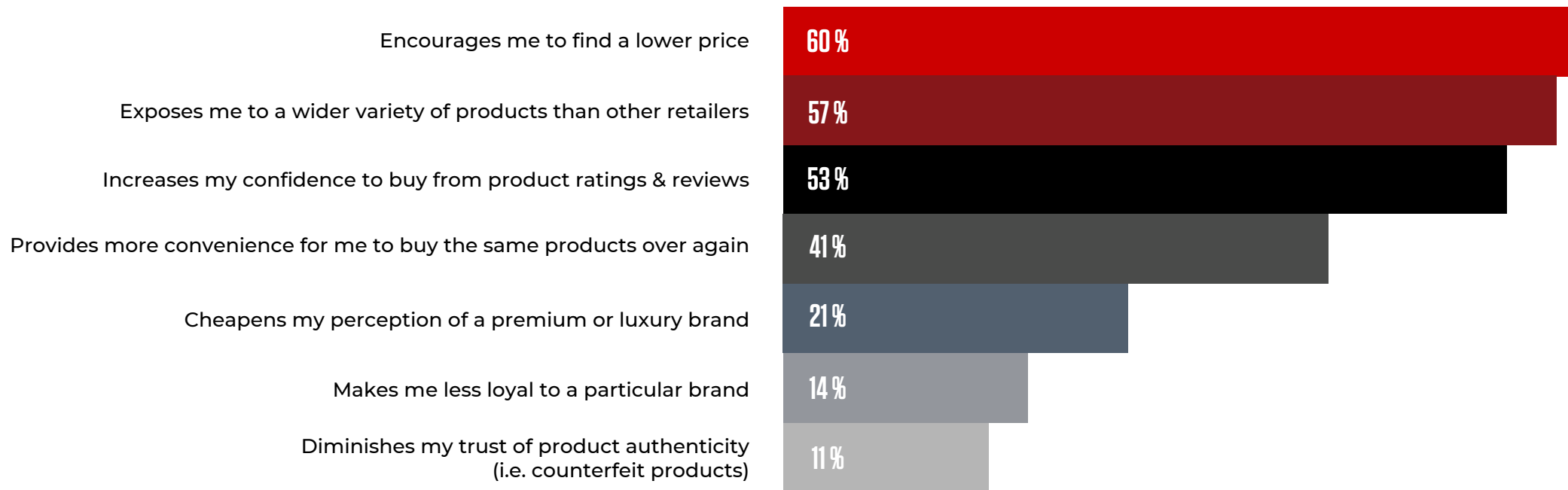
06

Amazon.com encourages footwear shoppers to find a lower price.

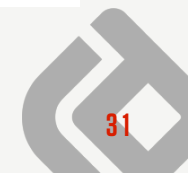


**Amazon.com encourages footwear shoppers to find a lower price.**

**AMAZON.COM'S INFLUENCE ON SHOPPERS**



For you personally, how does shopping on Amazon.com influence your choice of footwear?



## Amazon.com encourages footwear shoppers to find a lower price.

### 01

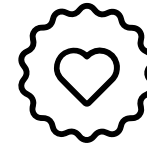
It is well documented that Amazon.com encourages shoppers to find a low price, and our survey found the same with 60% of footwear shoppers indicating Amazon influences them to find a lower price. However, just 14% say Amazon makes them less loyal to a particular brand.

### AMAZON.COM'S INFLUENCE ON SHOPPERS



**60%**

Influences them to find a lower price



**14%**

Makes them less loyal to a particular brand

## Amazon.com encourages footwear shoppers to find a lower price.

### 02

A common belief among luxury or premium brand marketers is that Amazon.com cheapens consumer perception of their brands, and 21% of survey respondents indicate that is true.

### 03

The authenticity of products sold on Amazon.com is not something consumers think too much about, and only 11% of respondents feel the site diminishes trust of product authenticity or worry about buying counterfeit footwear.

### BRAND PERCEPTION ON AMAZON.COM



**21%**

Feel Amazon.com cheapens the perception of brands

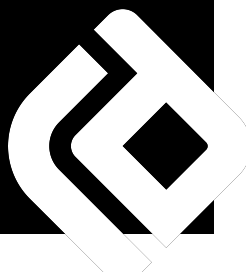


**11%**

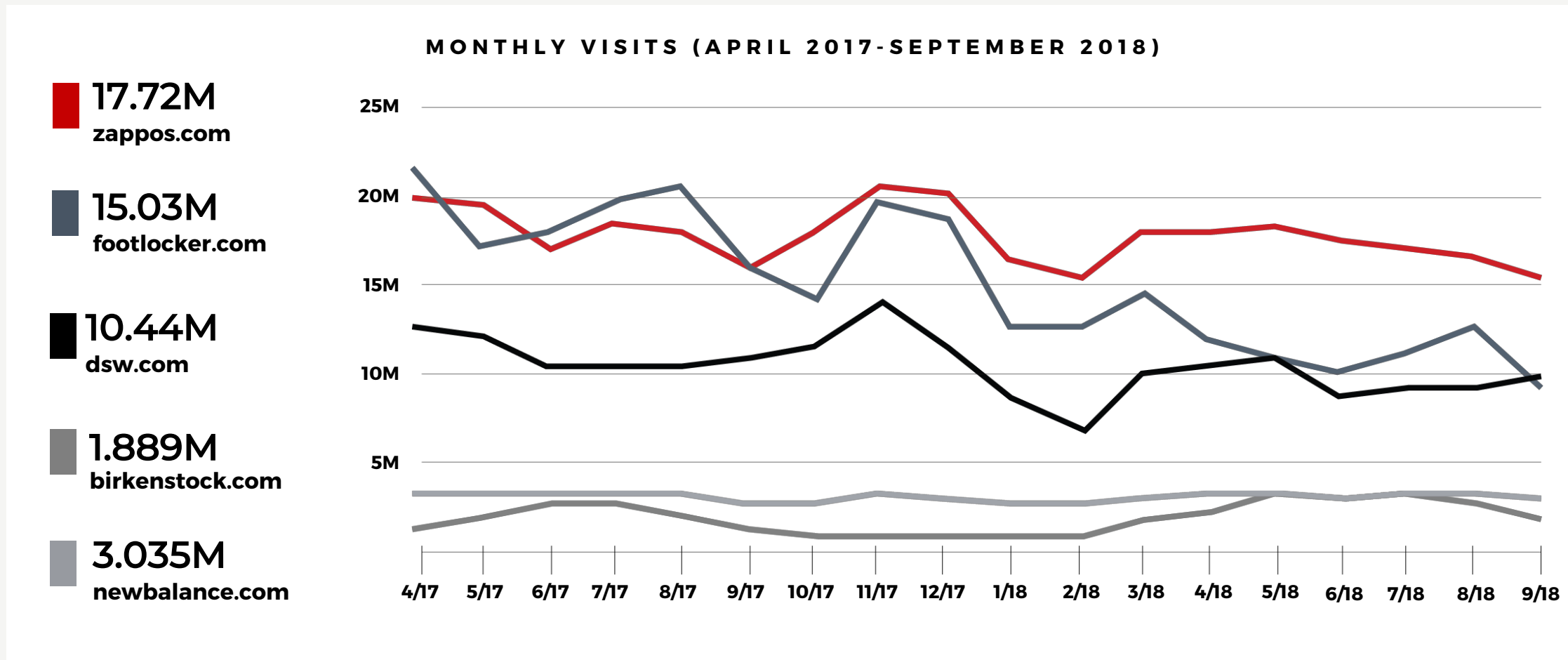
Feel Amazon.com diminishes trust of product authenticity

07

Analysis of the e-commerce landscape shows footwear retailer site traffic struggling to keep pace with past levels.



Analysis of the e-commerce landscape shows footwear retailer site traffic struggling to keep pace with past levels.



## Analysis of the e-commerce landscape shows footwear retailer site traffic struggling to keep pace with past levels.

### 01

As seen in the chart, on the previous page, footwear retailers show the most significant drop in monthly site visits over the past 18 months compared to footwear brands which appear to be holding nearly steady.

### 02

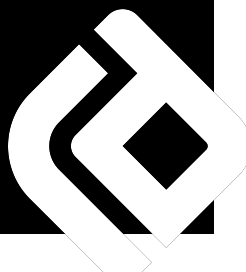
What is causing the decline in retailer monthly traffic is difficult to pinpoint, but increasing competition on Amazon.com likely plays a role.

### 03

The downsizing in monthly visits on Zappos.com is particularly interesting as Amazon.com owns the retailer. It may show the potential of footwear shopping cannibalization between domains. Few respondents to our survey mentioned shopping on Zappos.com.

08

Retailers can utilize video content, reviews, & augmented reality to improve the digital shopping experience.



**Retailers can utilize video content, reviews, and augmented reality to improve the digital shopping experience.**



A word cloud of retail-related terms. The most prominent words are 'SALES', 'DISCOUNTS', 'LOYALTY', and 'INVENTORY'. Other visible words include 'REVIEWS', 'FACTS', 'AR', 'SIZES', 'COMPARISON', 'RETURNS', 'SELECTION', 'PICTURES', 'MATERIALS', and 'VIDEO'.

If you could offer one piece of advice to a footwear retailer to improve your shopping experience, what would that be?

**01**

Unsurprisingly, footwear shoppers care about affordability, finding discounts, sales, and loyalty or reward programs.

**02**

Retailers can help customers resolve issues around sizing like stocking enough popular shoe sizes, providing adequate shoe sizing guidance, size comparison tools, and reviews that mention shoe size.

08

**Retailers can utilize video content, reviews, and augmented reality to improve the digital shopping experience.**



A word cloud of retail and footwear-related terms. The largest word is 'SALES', followed by 'DISCOUNTS', 'LOYALTY', and 'INVENTORY'. Other words include 'REVIEWS', 'FACTS', 'AR', 'SIZES', 'COMPARISON', 'RETURNS', 'MATERIALS', 'SELECTION', 'PICTURES', 'VIDEO', and 'COMPARISON'.

If you could offer one piece of advice to a footwear retailer to improve your shopping experience, what would that be?

03

Consumers want pictures or videos of shoes in real life conditions, walking demo videos, and augmented reality to see pictures on feet or different pant styles.

04

Shoppers want to better understand the quality of footwear products and materials.

## ABOUT RED DOOR INTERACTIVE

Red Door Interactive uses data, technology, and top industry talent to inform the development of breakthrough creative and implement smarter marketing practices, ultimately driving more revenue for our clients.





**THANK YOU.**

Please direct questions and  
feedback regarding this report to:

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