



INTERNATIONAL JOURNAL OF RESEARCH IN COMMERCE AND MANAGEMENT

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A STUDY OF CONSUMERS PERCEPTION AND ATTITUDE IN FOOTWEAR INDUSTRY

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ABSTRACT

The Indian footwear market offers many opportunities in the form of a huge market which is growing at a fast pace. The present article tries to capture the prevailing market conditions in the Indian footwear industry. It explains the bases of market segmentation in the footwear industry. It explains the reasons for why India is such a big player in the footwear industry. It captures the growth of the industry over past few years. It takes into account both the foreign players and the largest domestic player

INTRODUCTION

India has a huge population that is second only to China. This huge population has also got a huge demand for shoes. The total demand for shoes was estimated at 800 million pairs in the past. This means the per capita demand for shoes was less than one pair. The per capita demand is expected to touch 2.5 pairs of shoes in the current year i.e. 2010.

The footwear industry is a significant segment of the leather industry in India. Here also India ranks second only to China in the footwear producing countries. While the major production in world is of ladies footwear, India produces more of gents' footwear. The industry is labour intensive in nature. It is concentrated in the small and cottage industries sector. While leather and uppers are concentrated in large scale units, the sandals and chappals are produced in the household and cottage sector. The major production centers are Chennai, Ranipet and Ambur in Tamil Nadu; Mumbai in Maharashtra; Kanpur in UP, Jalandhar in Punjab; Agra; and Delhi.

Nearly 16% of global footwear production is done in India Footwear is expected to comprise about 60% of total leather exports by 2011.

WHY INDIA HAS AN EDGE IN FOOTWEAR INDUSTRY?

India manufactured 2.06 billion pairs in 2007-08 which represents 16% of the global production. 1.1 billion pairs were exported during this time period. India has an edge over other countries and therefore the export share in foreign market is increasing on year to year basis. The major reasons for this advantage that India has are:

- Raw material adequacy
- Best tanning expertise
- Availability of skilled workforce
- Cheaper wage rate as compared to other countries
- Increased capacity of production units
- World class institutional support for designing and testing

The Indian footwear industry is provided with institutional infrastructural support. The premier institutions involved are Central Leather Research Institute, Chennai; Footwear Design and Development Institute, Noida; National Institute of Fashion Technology, Delhi etc. These institutes provide support in the areas of technological development, design development, product development and human resource development.

NEED OF THE STUDY

Until recently a major part of demand in footwear was met by unorganized sector. Branded shoes accounted for a very small share of market and less than 1% of footwear was sold at a price exceeding Rs 500 per pair. India produces more of gents' footwear whereas the world's major production is in ladies'

footwear. As footwear retailing in India remains focused on men's shoes there is a plethora of opportunities in the exclusive ladies' and kids' footwear segment. With the advent of modern organized retail this sector is going to witness major changes. The current research paper attempts to analyze some aspects in the consumer decision process for footwear which may be helpful for designing suitable strategies by players in this segment.

OBJECTIVES

1. To study about the important players in the Indian footwear industry.
2. To analyze the aspects of consumers decision process for footwear
3. To suggest suitable measures for players in Indian footwear industry.

LIMITATIONS

The limitation of the research is that results may be biased due to consumers boosting their social status or income.

RESEARCH METHODOLOGY

1) Sources of Data: -

- a) Primary Data:-

In this research the primary data has been collected from consumers in Delhi, Faridabad & Gurgaon. 250 questionnaires were mailed to consumers out of which response came from 186 consumers. 6 questionnaires were found to be partially filled so only 180 questionnaires were considered for final analysis. The final 180 sample size had 92 consumers from Delhi, 52 from Faridabad and 36 from Gurgaon. Convenient sampling was used.

b) Secondary Data:-

Secondary data has also been used wherever necessary. It has been collected from newspapers, journals, reference books & internet.

2) Sampling Design

The research was conducted in Delhi, Faridabad and Gurgaon areas. 250 questionnaires were mailed to individuals in these areas. The final sample size was 180. Convenience sampling was used.

3) Research Analysis:

Descriptive technique like table has been used to show the research analysis. The analysis has been done in a very simple to understand manner. The use of jargons in the analysis has been kept to a very minimum level. A five-point Likert-type scale rating from 5=strongly agree to 1= strongly disagree was used for measuring the items of this study.

CURRENT SCENARIO OF FOOTWEAR MARKET IN INDIA

Under this section we shall detail upon the demand for shoes in the footwear market in India which shows the growing footwear market in India, market share in terms of organized and unorganized sectors,

footwear segmentation in terms of product share by consumer variation, by usage pattern and by price range.

The Growing Footwear Market in India

Table 1

Demand of shoes

Year	Million Pairs
1992-93	400
1996-97	550
2006-07	1570
2009-10 (projected)	2500

Source: Indian Footwear Industry Annual Report 2008

It can be clearly seen that the Indian footwear market has been growing rapidly over the past few years. Footwear is expected to comprise about 60% of the total leather exports by 2011 from over 38% in 2006-07. Demand for shoes has been steadily rising. With the new economic policy of 1991, many industries have seen foreign participation on an increased scale. This includes the footwear industry too. This is advent by the presence and launch of latest designs from time to time. According to the 'Indian Footwear Analysis Report' the growth in footwear sector is going to be phenomenal.

Table 2

Market Share in terms of Organized and Informal Sectors in Shoe Manufacturing in India

Segment	Share (in %)
Organized sector	20
Informal sector	80

Source: Indian Footwear Industry Annual Report 2008

Shoe manufacturing is dominated in India by the informal sector. The organized sector accounts for only 20% of the shoe manufacturing segment while the informal sector manufacturers the remaining 80%. The industry is widely segmented in the form of:

- a. Large Indian Producers
- b. Multinational companies producing in India or exporting from abroad
- c. Small scale semi-organized sector
- d. Cottage industry

Out of these only the first two segments i.e. the large Indian producers and the MNCs are involved in the production of branded footwear. Until recently a major part of the demand was met by the unorganized, informal small scale sector. Branded footwear accounted for only 20% of the entire market.

Footwear Segmentations

Footwear has diverse segmentation. Three such segments prevalent in India are presented below:

Table 3

Product Share by Consumer Variation

Type	Share (in %)
Men Shoes	52
Women Shoes	8
Boys Shoes	15
Girls Shoes	12
Kids Shoes	13

Source: Indian Footwear Industry Annual Report 2008

As already mentioned, the Indian footwear market is dominated by the gents' segment whereby 52% of the market share is occupied by this segment but globally it is the ladies' segment which has the dominant share. India is fast experiencing a change in this product mix. In the coming years this ratio is set to change. There are going to be many opportunities in the kids market and the ladies segment of the footwear.

Table 4

Product Share by Usage Pattern

Type	Share (in %)
Casual	46
Sports	42
Leather	12

Source: Indian Footwear Industry Annual Report 2008

The rising awareness about health and fitness is going to play a major role in increase of the sports shoes segment in the near future. Many foreign players have already shown increased interest in this segment. They have also come up with innovative marketing strategies to promote heavily their products.

Table 5**Product Share by Price Range**

Price per pair (in Rs)	Share (in %)
Below 500	69
500-1000	28
Above 1000	3

Source: Indian Footwear Industry Annual Report 2008

It can be clearly seen that less than 31% of the footwear was sold at a price exceeding Rs 500/- per pair. But all this is going to change very fast. The Indian footwear market is set to experience a phenomenal growth in the coming years. India is witnessing a fast changing retail landscape. So there is still a plethora of opportunities in the footwear industry.

PLAYERS IN FOOTWEAR INDUSTRY

The major multinational players in the Indian shoe industry are Bata, Reebok, Adidas, Puma and Nike. In the formal footwear market Florsheim, Clarks and Lotus are the big names. Lumberjack, Lee Cooper and Sketchers are the major players in the casual footwear market.

Adidas has a manufacturing contract with Lakhani. Nike gave its license in India to Sierra Industrial Enterprises, which had given the brand's manufacturing contract to Moja shoes. Nike is also selling through select Bata showrooms and a few departmental stores. Adidas has entered into a retail tie up with Phoenix.

The share of foreign brands in India with prices over Rs 1000 per pair is less than 5% of the branded footwear market or less than 1% of the total footwear market.

The global player, Reebok India was incorporated in 1985. Reebok has sales of \$3.5 billion and operations in over 40 countries worldwide. Reebok is introducing performance shoes. These performance shoes are customized for different sports like cricket, basketball, football, walking, jogging and other sports. The international shoe majors created a new interest for sport shoes in India. However their prices are far beyond the pocket of most Indian consumers. The domestic brands like Liberty, Phoenix and Action had priced sports shoes lower which starts from Rs 450. Thus the domestic players reaped the benefit of lower prices and sold large volumes of sports shoes.

Bata India Ltd is India's largest manufacturer and marketer of footwear products. Bata India sells over 60 million pairs per year throughout India and in the overseas market. Bata India is a part of the Global Bata Shoe Organization which is based in Toronto, Canada. In India it was incorporated as Bata Shoe Company in 1931. The company went public in 1973 and changed its name to Bata India Ltd.

Till eighties Bata was the most prominent footwear brand in India. But this changed with the entry of Private Indian and international brands. Bata was almost kicked out of the market by these players. The newcomers invested in retail outlets with great displays and interiors. They sold products which were perceived as hip.

Bata India is making a comeback with a vengeance. It is in the process of restructuring its retail business and refurbishing its 1,600 stores across the country. Bata is reinventing itself as an international retailer. It is offering customers the best in footwear in terms of fashion, quality and price. It has introduced the

concept of flagship stores to provide complete and unique shopping experience. These stores are at par with their stores abroad. International trends, relaxed ambience, great products, and courteous staff at these stores are all part of Bata's new marketing strategy.

It also made investments in technology at its plants. Large investments have also been made in the area of IT to integrate approximately 10 stores on a real time basis.

The ongoing restructuring involves ways and means to increase their topline and bottoline growth. Bata India has been a high cost company. The company had posted a financial loss of Rs 26 crore for the year ended 2004 on a turnover of Rs 716 crore. The company hopes to wipe out the accumulated losses by 2010.

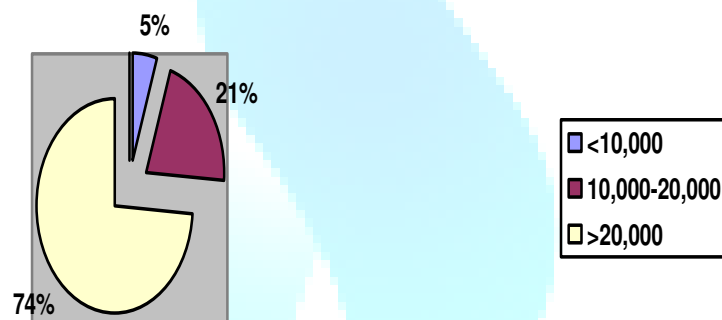
The company is emphasizing on presenting a contemporary and trendy brand image, which translates to both its products and corporate culture. The company is repositioning itself as a market driven, fashion conscious lifestyle brand with an emphasis on service and production. The company has recently introduced international styles and trends for women, men and kids which has gone a long way in providing trendy and contemporary image to the company.

Bata is also trying to improve its logistics and distribution system. Bata made investments to the tune of Rs 20 million in the year 2004 to improve it. All these are part of the restructuring at Bata India Ltd with many more strategies still in the pipeline.

Bata has now managed to capture a 24% share of the organized footwear market. The company markets international brands like Weinbrenner, hush Puppies, Dr Scholls, Reebok, Adidas and Azaleia.

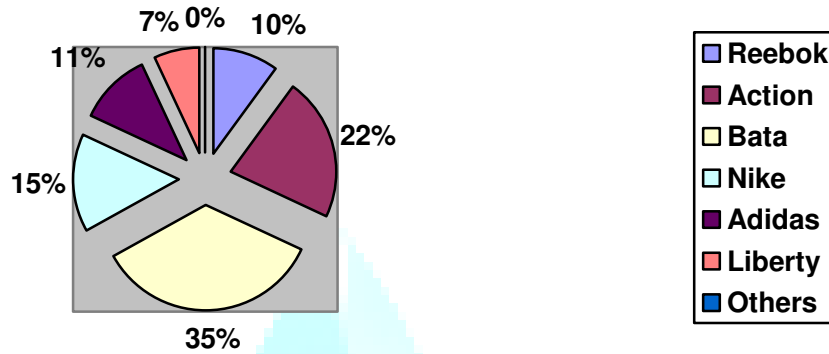
RESEARCH FINDINGS & ANALYSIS

In this section the research findings shall be presented and explained. The use of diagrams and tables has been made to make results easier to understand. This has been followed by analysis. Attempt has been made to present the analysis in a very simple language. The explanation regarding use of scale has been made at the relevant analysis part.

Diagram 1**Monthly Income of Consumers (in Rs.)**

Analysis: 133 consumers i.e. 74% had a monthly income exceeding Rs 20,000, 38 had an income between Rs. 10,0000 & 20,0000. Rest of the 9 consumers had a monthly income less than Rs 10,000. Majority of the consumers had a monthly income exceeding Rs 20,000 p.m.

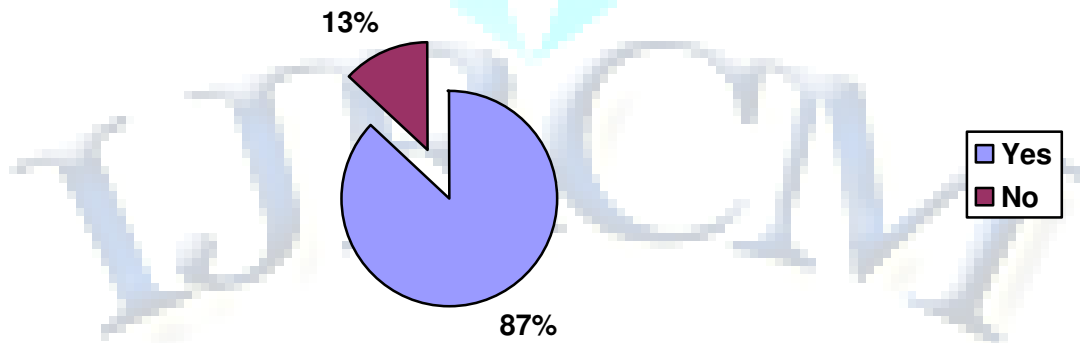
Diagram 2**Brand of Footwear Worn by Consumers (in %)**



Analysis: Bata is the leading brand followed by Action, Nike, Adidas, Reebok and Action among the consumers surveyed. 63 consumers had Bata footwear, 40 had Action, 27 had Nike, 20 had Adidas, 18 had Reebok, 12 had Liberty.

Diagram 3

Consumer perception of significant differences among different footwear brands



Analysis: Consumers feel there are significant differences in brand categorizing as 157 consumers out of 180 said that they perceived significant differences among different footwears of brands. Only 23 consumers said that they did not perceive significant differences among different footwear brands. This shows that footwear is in the area of complex decision making for majority of consumers. It is a high involvement product.

Table 6

Basis of Selection of Footwear among Consumers

Criterion	No. of response	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Weighted Average
Weights assigned	-	5	4	3	2	1	
Cost is important for selection of footwear	180	63	86	1	22	8	3.97
Features of the shoe are important for selection of footwear	180	59	80	14	21	6	3.92
Brand loyalty is important factor for selection of footwear	180	14	29	3	93	41	2.34
Advertisement is an important element for selection of footwear	180	34	73	10	46	17	3.38
Other factors like innovation in design, ease of cleaning the footwear and variety of colours and designs available within a brand are important factors in purchase of footwear	180	0	41	5	73	61	2.14

Analysis: A five-point Likert-type scale rating from 5=strongly agree to 1= strongly disagree was used for measuring the items of this study. The responses were then tabulated. As can be seen from the table 6 the factors have been enlisted under the heading criterion. They have been assigned weights 1, 2, 3, 4 & 5 respectively for responses Strongly Disagree, Disagree, Neutral, Agree & Strongly Agree. Then weighted average has been calculated by dividing the product of weights and number of responses by total number of responses.

Factors having a weighted average of more than 3 have been then taken as important. It means these factors are considered important by respondents for selection of footwear. Out of the five factors considered three factors fall in this category.

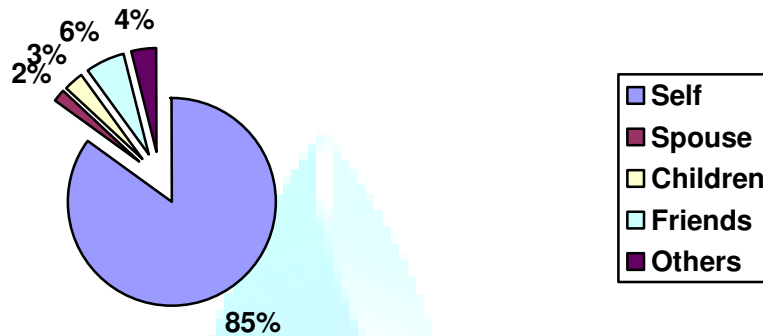
The consumers attach highest importance to cost and features of the footwear. Advertisement was a lesser important factor for selecting footwear.

Cost and features were the most important aspects for selection of footwear for consumers. Out of the 180 consumers, 149 (63+86) consumers either strongly agree or agree that cost is an important aspect. This was followed by features, to which 139 (59+80) consumers either strongly or agreed is an important factor. 107 (34+73) consumers chose to agree that advertisement is an important factor for selection of footwear.

Brand loyalty scored low on this aspect which was selected by only 43 (14+29) consumers as important factor. Some of the other aspects like innovation in design, ease of cleaning the footwear and variety of colours and designs available within a brand were also found as scoring low.

Diagram 4

Influencer in Purchase of Footwear



Analysis: The consumer himself was found to be the final decision maker in purchase of footwear most of the times with 85% consumers i.e. 153 out of 180 saying that they made the final decision. Spouse, children, friends and others played were rarely the final decision makers. 11 said friends, 5 said children, 4 said spouse and 7 said that others made the final purchase decisions.

CONCLUSIONS AND SUGGESTIONS

The study led to knowledge about the important players in the Indian footwear industry. The major aspects analyzed aspects in consumer decision process for footwear. Major conclusions and suggestions of the research are:

1. The footwear industry in India is mainly in the unorganized sector. It is labour intensive and is concentrated in the small industries sector.
2. Branded shoes account for only 20% of the footwear market and less than 1% of the shoes sell at a price exceeding Rs. 500 per pair.

3. The Indian footwear industry is provided with infrastructure support through premier institutions like Central Leather Research Institute, Chennai, Footwear Design and Development Institute, Noida, National Institute of Fashion Technology, New Delhi etc. in the areas of technological development, design and product development and human resources development.
4. The research reveals that majority of consumers feel there are significant differences in brand categorizing. Footwear is in the area of complex decision making and is a high involvement product. Therefore branding is a major decision for footwear manufacturers. Brand building should be given high importance by manufacturers.
5. The consumers attach highest importance to cost and features of the footwear. Therefore affordable footwear with good features has a high potential in the footwear market. Manufacturers should keep this in mind.
6. According to the research the consumer himself was found to be the final decision maker in purchase of footwear most of the times. Therefore efforts should be made to target the final consumer like advertisement directed towards them.

The Indian footwear industry is yet to witness changes in product mix, market structure and strategies of key players. The market has huge untapped potential. Like in all the other industries, technology will play a major role in reshaping of footwear industry in India.

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