

American Podiatric Medical Association

Woman Consumer Survey SUMMARY REPORT



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The Online Survey Professionals

Women Consumer Survey

Study Introduction & Objectives

Study Introduction

- The American Podiatric Medical Association (APMA) is an industry organization of foot and ankle physicians and surgeons whose core mission is to advance and advocate for the profession of podiatric medicine and surgery for the benefit of its members and the public. Ultimately, the APMA is continually working to be the leading professional organization and unifying force in the field of podiatric medicine and surgery.
- APMA partnered with Infosurv to implement a consumer market research survey to gauge opinions of US women regarding their feet and the health of their feet.

Study Objectives

- The overall objective of the study is to answer the following questions:
 - ✓ How do women feel about the appearance of their feet?
 - ✓ Do their feet hurt? And if so, what are the primary reasons?
 - ✓ Are the shoes they are wearing causing the foot problems?
 - ✓ Is a comfortable shoe more important than a fashionable shoe?

Survey Design

- An online survey was administered to a random sample of US women. US women were allowed from 12/08/06 until 12/10/06 to complete the survey, with regular email reminders going out to uncompleted US women invited to complete the survey.
- To protect the security of the Web based form, each respondent was assigned a unique Personal Access Code (PAC) embedded into a survey link in her email invitation.
- Following the survey administration period, the response database was cleaned of both duplicate and unauthorized responses. Ultimately, interviews were conducted among 394 women, with 229 interviews being collected among women between the ages of 18-49 and 165 among those aged 50 or older.
- The error rates associated with this level of interviewing are shown below.

Age Group	Precision Rate at 95% Confidence Level
18-24	±12.55
25-29	±15.49
30-34	±16.56
35-49	±10.16
18-49	±6.48
50+	±7.63
All Respondents	±4.94

Women Consumer Survey Executive Summary

- US women aged 18-49 spend more time on their face (44%) and their hair (22%)—their two most visible features—than their feet (16%).
 - ✓ Thus, it's not surprising that the majority of US women aged 18-49 (72%) spend less money on their feet than other body parts. Those standing on their feet 6+ hours a day are least likely to say they spend less on their feet than on other body parts (63% vs. 76% among those on their feet from 1-3 hours and 75% of those on their feet from 4-6 hours).
- While relatively few women have a love affair with their feet, the majority of women aged 18-49 either like (46%) or love (11%) their feet. Just over one-quarter of women actively dislike their feet.
 - ✓ Their main complaint about their feet is appearance (60%) rather than pain (26%) or size (15%) related.
- The largest percentage of US women aged 18-49 show they care for their feet by moisturizing them (41%) and by having professional pedicures (30%).
- The most commonly reported foot ailments experienced by US women aged 18-49 are not surprisingly the least severe: blisters (39% suffer from them most often). The type of foot ailments plaguing US women varies by age and income:
 - ✓ Blisters: Those aged 18-24 (52%) and higher income women are most likely to have suffered from blisters (50% of those with incomes of \$125,000 or more have suffered from blisters).
 - ✓ Corns: Those aged 30-34 (20%), 35-49 (19%) and 50+ (16%) have suffered most often from corns. Those with incomes of \$60,000-\$74,999 (22%) and \$100,000 to \$124,999 (26%) are most likely to have suffered from corns.
 - ✓ Ingrown Toenails: At 14%, those aged 35-49 are most likely to have suffered from ingrown toenails.
 - ✓ Pinched Nerve and Heel Pain: No significant differences in those suffering from pinched nerves or heel pain were measured with respect to age or income.
 - ✓ No Foot Ailments: Those 50+ are most likely to say they haven't suffered from any of the foot ailments evaluated (30%); so are those with incomes of \$75,000-\$99,999 (33%) and \$125,000-\$149,999 (30%).
- Not surprisingly, just over one-third of US women (37%) have ever visited a podiatrist—even though 84% say they have experienced at least one foot ailment. Even fewer women aged 18-49 have visited a podiatrist (just 26%).
- The appearance of their feet generally does not keep US women aged 18-49 from wearing open toed shoes—only 12% said that the appearance of their feet kept them from wearing open toed shoes.

Women Consumer Survey Executive Summary (Continued)

- The majority of women aged 18-49 haven't had their feet measured for shoes within the past 5 years (65%).
 - ✓ This is interesting as those who haven't had their feet measured in the past 5 years are somewhat more likely than those who have had measurements to say they have some sort of foot ailment (77% among those who haven't had their feet measured in the past 5 years compared to 70% among those who have in the past 5 years).
- The majority of US women aged 18-49 (73%) groom their feet at least once a month. Middle to upper class women (incomes of \$75,000+) groom their feet more frequently—88% of these women groom their feet at least once a month compared to 72% of those with incomes of less than \$75,000. No significant differences were measured with respect to income and the amount of money spent on foot care relative to other body parts.
 - ✓ Those who groom their feet every other week are most likely to report having some foot ailment (87%). Likely because they don't see the need for grooming, those who never groom their feet are least likely to report having any foot ailments (59%).
- The vast majority of women aged 18-49 (77%) spend less than \$200 on shoes.
 - ✓ While there were no discernable patterns with respect to age and the amount of money spent on shoes, those in the 35-49 year old segment are most likely to spend less than \$100 a season on shoes—55% said they spend less than \$100 a season on shoes. As we would expect, a large number of high income women spend more than \$400 each season on shoes: 30% among those with incomes of \$125,000-\$149,999, 25% of those with incomes of \$150,000-\$199,999 and 50% of those with incomes of \$200,000+.
 - ✓ Those who spend \$100-\$200 (83%) and \$300-\$400 (81%) each season are most likely to have some foot ailment.
- Women aged 18-49 are most likely to consider both comfort and style when they purchase shoes, though about a third of women (31%) consider only comfort and 7% only consider style when purchasing shoes.
 - ✓ The emphasis of style on shoe purchases declines with age—from a high of 21% among those aged 18-24 and 15% among those 25-29 to a low of just 1% among those 50+. Those aged 35-49 (42%) and 50+ (57%) are most likely to say they place more emphasis on comfort than younger women.
 - ✓ When it comes to purchasing shoes based on style or comfort, those buying for comfort are slightly more likely to have a pinched nerve than those buying for style only (3% vs. 0%, respectively). Those buying for style are slightly more likely than those buying for comfort to have blisters (33% vs. 27%, respectively).
 - ✓ Those who choose style over comfort are more likely to groom their feet at least once a week (30% vs. 19% of those who buy for comfort).



Women Consumer Survey Hours Spent on Their Feet

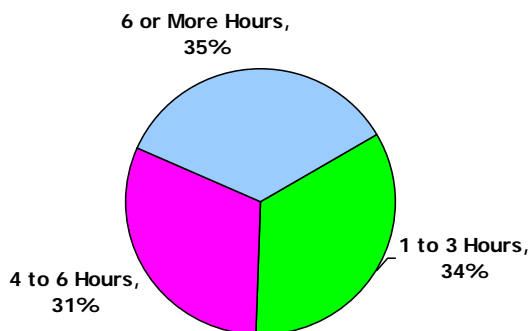


Women aged 18-49 are about as likely to be on their feet from 1 to 3, 4 to 6 and 6 or more hours a day. No significant differences were measured between all women surveyed and those between the aged of 18 and 49.

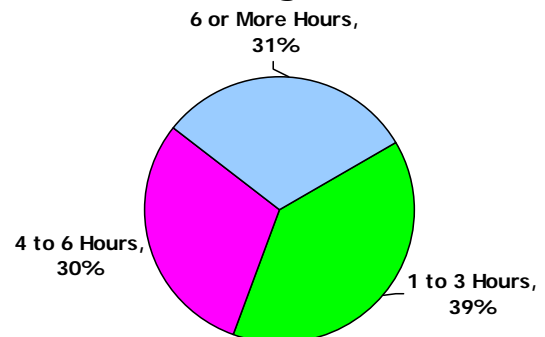
- Those aged 30-49 are least likely to be on their feet for long periods of time—only 3% of these women are on their feet 6 or more hours a day—and most likely to be only their feet just 1-3 hours (46%) or 4-6 hours (51%).
- Those with incomes of less than \$30,000 are on their feet the most, with 42% of these women saying they are on their feet 6 or more hours each day.

How many hours a day do you stand on your feet?

All Women Respondents



Women Aged 18-49



Women Consumer Survey Body Parts To Which Women Pay the Most Attention

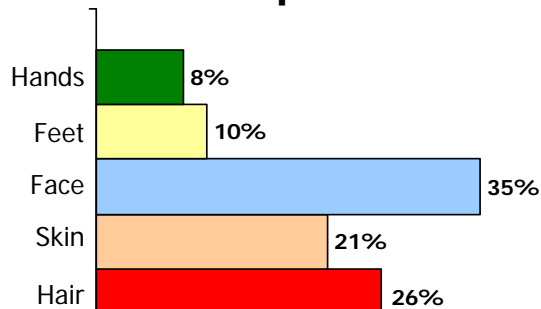


By far, women aged 18-49 are most likely to pay attention to their face (44%)—their most visible asset.

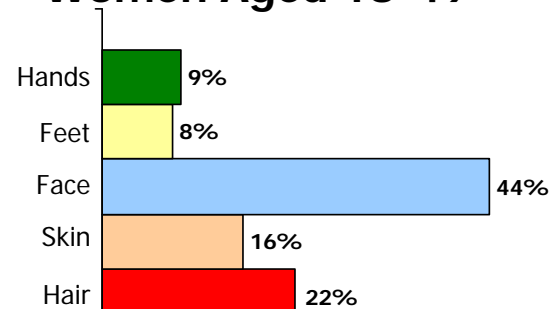
- At 30% and 25% respectively, hair and skin are most important to women 50 or older. Those 25-29 are most concerned about their face (53%). No significant age related differences were measured with respect to the percent of women that pay most attention to their feet.
- Those with incomes of \$100,000-\$124,999 are most likely to pay most attention to their feet (21%).

Which one of your body parts do you pay the most attention?

All Women Respondents



Women Aged 18-49





Women Consumer Survey

Amount of Money Spent on Feet Relative to Other Body Parts

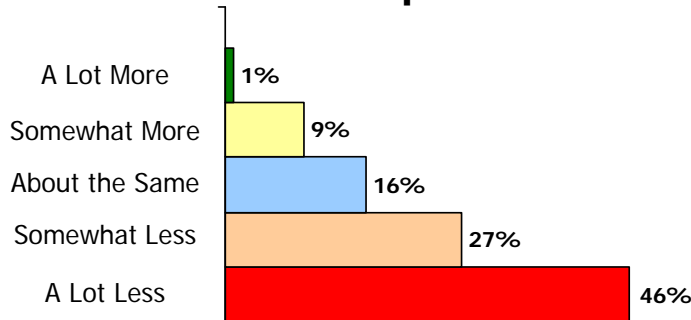


Regardless of their age, women are less likely to spend money on their feet than other body parts—72% of women aged 18-49 said they spend less on their feet than other body parts.

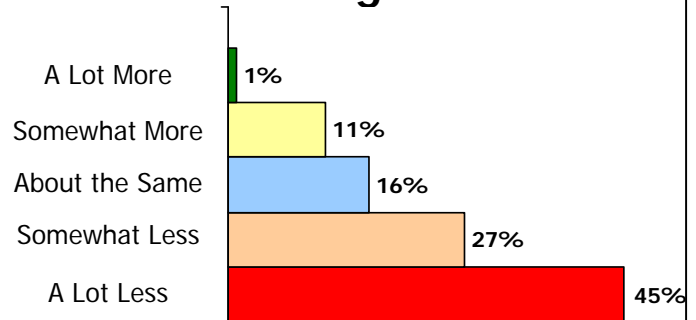
- No significant differences were measured with respect to income.
- US Women aged 18-49 standing on their feet 6+ hours a day are least likely to say they spend less on their feet than on other body parts (63% vs. 76% among those on their feet from 1-3 hours and 75% of those on their feet from 4-6 hours).

Amount of money spent on feet relative to other body parts?

All Women Respondents



Women Aged 18-49



Women Consumer Survey

Frequency of Feet Grooming

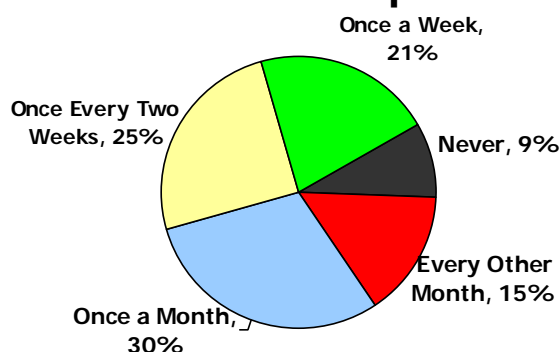


The majority of women aged 18-49 (73%) say they groom their feet at least once a month.

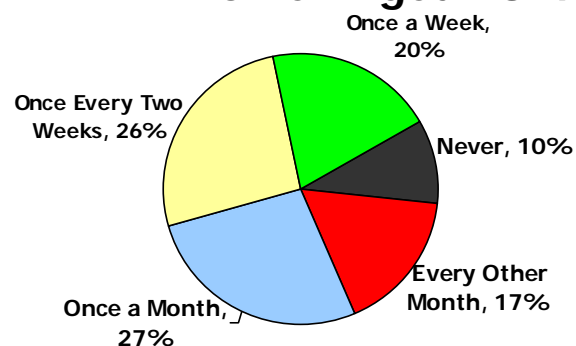
- ✓ While not significantly different, those on their feet 1-3 hours per day are slightly more likely to say they groom their feet at least once every 2 weeks than those on their feet for longer periods of time (49% vs. 42% among those on their feet from 4-6 hours and 44% of those on their feet 6+ hours per day).
- ✓ Those aged 30-34 groom their feet less frequently than women of other age groups—65% groom their feet at least once a month compared to a high of 80% of those aged 50 or over and 78% of those aged 25-29.
- ✓ Women with incomes of \$75,000 or more are most likely to groom their feet at least once a month—88% vs. 72% of those with incomes of less than \$75,000.

How often do you groom your feet?

All Women Respondents



Women Aged 18-49





Women Consumer Survey Women's Perceptions of Their Feet



While relatively few women have a love affair with their feet, the majority of women aged 18-49 either like (46%) or love (11%) their feet. Just over one-quarter of these women actively dislike their feet.

- Their main complaint about their feet relates to their feet's appearance (60%) rather than pain (26%) or size (15%).
- While the cause is not immediately apparent, those with incomes of \$50,000-\$59,999 have a more active dislike for their feet than women of other income groups (40% either hate or dislike their feet). No significant differences were measured by age segment.

How would you describe your perception of your feet?

	All Respondents	18-49 Year Olds
Hate Them	3%	4%
Dislike Them	23%	23%
Never Think About Them	19%	16%
Like Them	47%	46%
Love Them	7%	11%

What do you dislike about your feet?

	All Respondents	18-49 Year Olds
Appearance	57%	60%
Size	12%	15%
Pain	30%	26%



Women Consumer Survey How Women Show Their Feet They Care



The largest percentage of women aged 18-49 show they care for their feet by moisturizing them (41%) and by having professional pedicures (30%).

- Women that are 50 years old or older are most likely of the age groups to show their feet they care by moisturizing them (59%), and least likely to show they care by getting a professional pedicure (22%). At home massages are much more popular among those under 35 (21% vs. 11% among those over 35 years old).
- To show they care about their feet, those with incomes of \$150,000 to \$199,999 are most likely to get a professional pedicure (63%), those with incomes of \$60,000 to \$74,999 are most likely to moisturize their feet to show them they care. The "at home massage" is

How do you most often show your feet that you care for them?

	All Respondents	18-49 Year Olds
Professional Pedicure	27%	30%
At Home Massage	14%	19%
Stretching	11%	10%
Moisturizing	48%	41%

most popular among those with incomes of \$20,000-\$29,999 (22%). Stretching is the most popular way of showing their feet they care among those with incomes of under \$20,000 (19%) and \$125,000-\$149,999 (20%).



Women Consumer Survey Shoe Purchasing: Comfort vs. Style

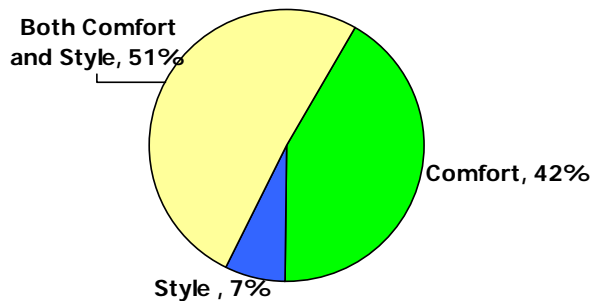


Women 18-49 are most likely to consider both comfort and style when they purchase shoes (57%), though about a third of women (31%) only consider comfort and 11% only consider style when purchasing shoes.

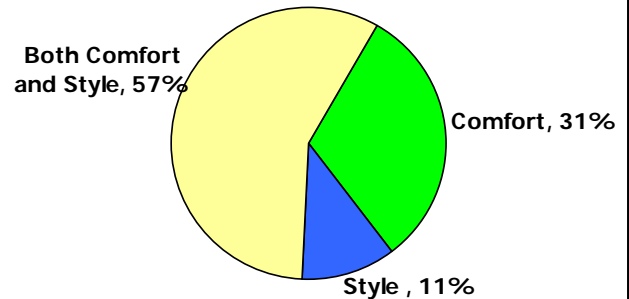
- Those aged 35-49 (42%) and 50+ (57%) are most likely to say they place more emphasis on comfort than younger women. The emphasis of style on shoe purchases declines with age—from a high of 21% among those aged 18-24 and 15% among those 25-29 to a low of just 1% among those 50+. Those aged 25-29 (65%) and 30-34 (66%) are most likely to feel that style and comfort are equally important when buying shoes.
- Comfort is most important to women with incomes of \$60,000-\$74,999 (59%) and \$75,000-\$99,999 (54%). Women with incomes of \$150,000 to \$199,999 (63%) are most likely to place the same emphasis on comfort and style.

When purchasing shoes, do you place more emphasis on comfort or style?

All Women Respondents



Women Aged 18-49



Women Consumer Survey Amount Spent on Shoes Each Season

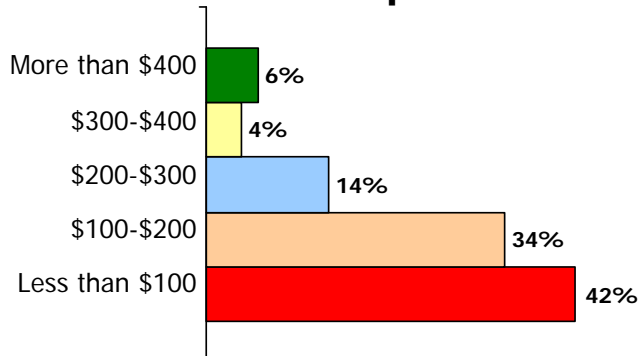


The majority of women 18-49 (77%) and those aged 50+ (74%) spend less than \$200 on shoes each season.

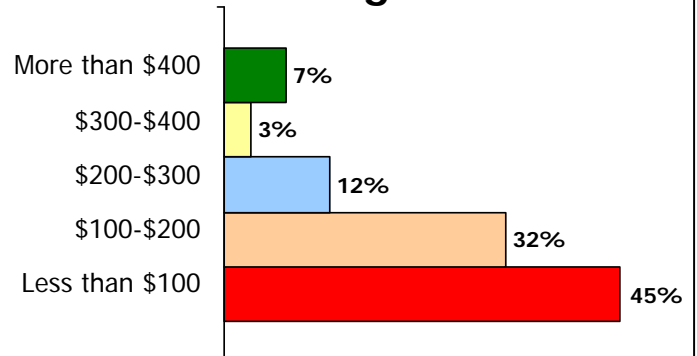
- As we would expect, a large number of high income women spend more than \$400 each season on shoes: 30% of those with incomes of \$125,000-\$149,999, 25% of those with incomes of \$150,000-\$199,999 and 50% of those with incomes of \$200,000+ spend more than \$400 a season for shoes.

How much do you spend on shoes for yourself each season?

All Women Respondents



Women Aged 18-49





Women Consumer Survey Foot Ailments



The most commonly reported foot ailments suffered the most by US women aged 18-49 are not surprisingly the least severe: blisters.

- Blisters: Those aged 18-24 (52%) and higher income women are most likely to have suffered from blisters (50% of those with incomes of \$125,000 or more have suffered from blisters).
- Corns: Those aged 30-34 (20%), 35-49 (19%) and 50+ (16%) have suffered most often from corns. Those with incomes of \$60,000-\$74,999 (22%) and \$100,000 to \$124,999 (26%) are most likely to have suffered from corns.
- Ingrown Toenails: At 14%, those aged 35-49 are most likely to have suffered from ingrown toenails; no significant differences were measured with respect to income.
- Pinched Nerve and Heel Pain: No significant differences in those suffering from pinched nerves or heel pain were measured with respect to age or income.
- No Foot Ailments: Those 50+ are most likely to say they haven't suffered from any of the foot ailments evaluated (30%); so are those with incomes of \$75,000-\$99,999 (33%) and \$125,000-\$149,999 (30%).

Which of the following foot ailments have you suffered from the most as a result of uncomfortable or ill-fitting shoes?

	All Respondents	18-49 Year Olds
Blisters	33%	39%
Corns	14%	14%
Ingrown Toenails	10%	11%
Pinched Nerve	3%	3%
Heel Pain/ Planter Faciitis	16%	15%
None of the Above	23%	18%



Women Consumer Survey

Age When Women Had Their First Professional Pedicure

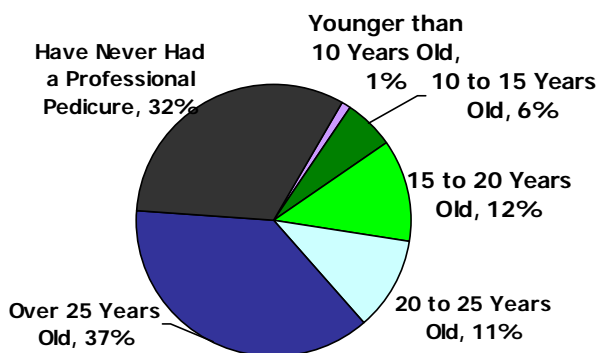


The vast majority of women aged 18-49 (72%) have had a professional pedicure at least once in their life; the greatest percentage of these women had their first professional pedicure after the age of 15 (61%).

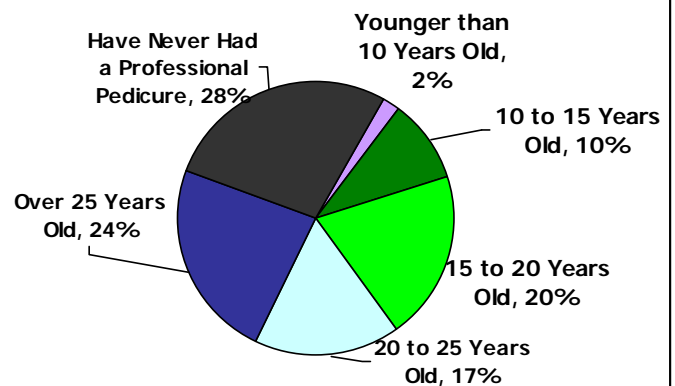
- As age increases, the likelihood of having their first professional pedicure when they were less than 15 years old decreases considerably—from a high of 23% among those aged 18-24 to a low of 1% among those aged 50 or older. Likely a function of age, those with incomes of <\$20,000 (19%) are most likely to have had their first professional pedicure when they were less than 15 years old.

How old were you when you had your first professional pedicure?

All Women Respondents



Women Aged 18-49



Women Consumer Survey

Appearance of Feet's Impact on Wearing Open Toed Shoes

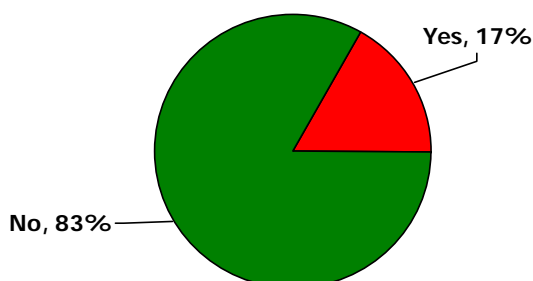


The appearance of their feet generally does not keep women aged 18-49 from wearing open toed shoes—only 12% said that the appearance of their feet kept them from wearing open toed shoes.

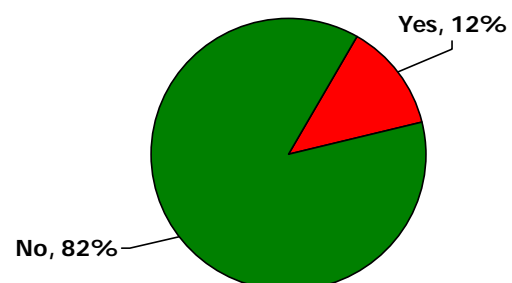
- Those with incomes of <\$20,000 (24%) and \$50,000-\$59,999 (24%) are most likely to say that the appearance of their feet would keep them from wearing open toed shoes.
- When it comes to age, those 18-24 (21%) and 30-34 (23%) are most likely to say they didn't wear open toed shoes because of the appearance of their feet.

Does the appearance of your feet keep you from wearing open toed shoes?

All Women Respondents



Women Aged 18-49





Women Consumer Survey Podiatrist Visits

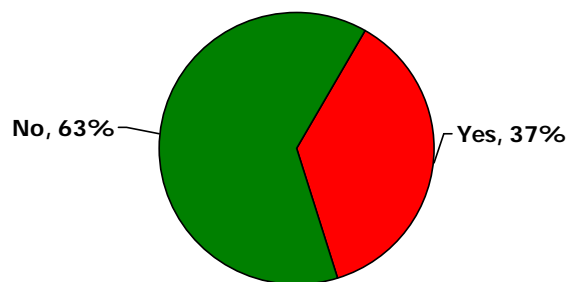


Just over one-quarter of women aged 18-49 have visited a podiatrist.

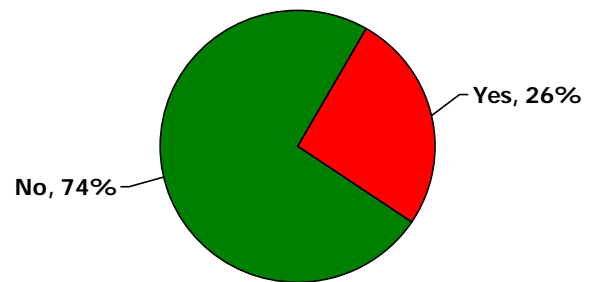
- Not surprisingly, women 50 and older are most likely to have seen a podiatrist (53%). Among the 18-49 age segment, those aged 35-49 are most likely to have seen a podiatrist (33%).
- Women with incomes of \$100,000-\$124,999 are most likely to have seen a podiatrist (70%).

Have you ever visited a podiatrist?

All Women Respondents



Women Aged 18-49



Women Consumer Survey Last Time Their Feet Were Measured for Shoes

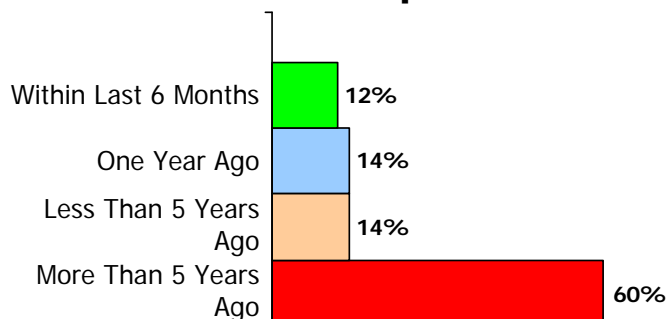


The majority of women aged 18-49 haven't had their feet measured for shoes within the past 5 years (65%).

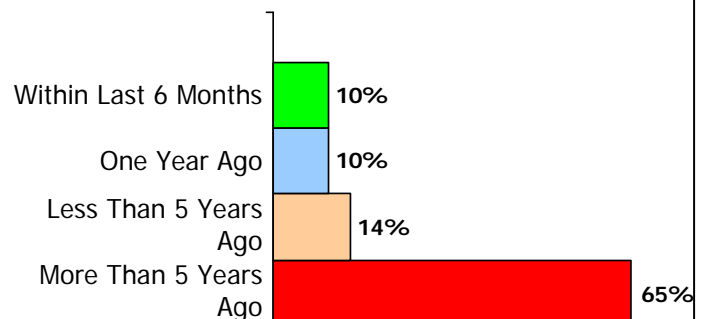
- Those 50+ (34%) and those aged 30-34 (31%) are most likely to say they were measured for shoes in the past year.
- At just 25%, women with incomes of \$150,000-\$199,999 are most likely to say they were measured for shoes within the past 6 months.

When was the last time you had your feet measured for shoes?

All Women Respondents



Women Aged 18-49





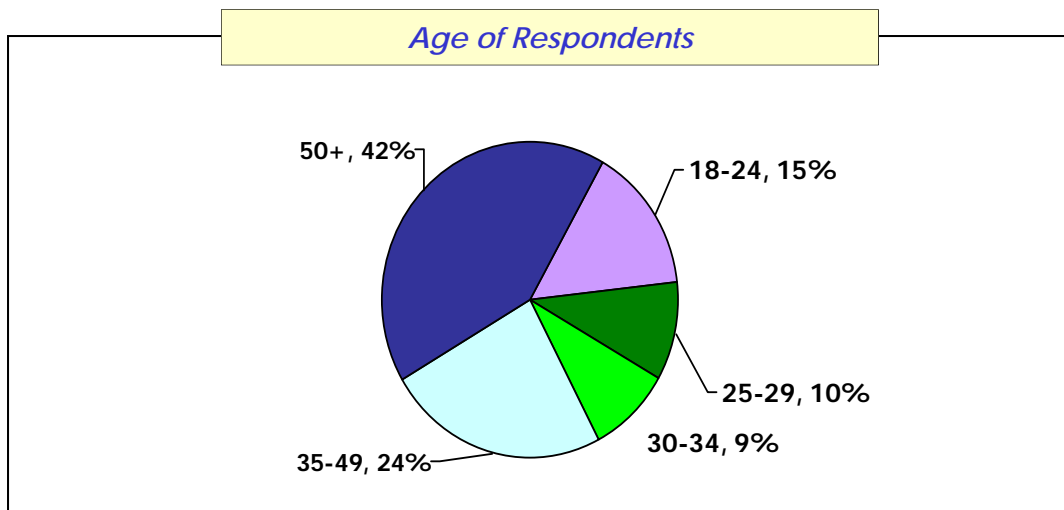
Women Consumer Survey Demographics: Age & Income



Women interviewed through this survey varied a great deal by age and by income. The income range also varied a great deal by age, with the largest income segments (\$125,000+ being made up almost exclusively of those aged 50+.

- As we would expect, those aged 18-24 were most likely to report incomes of less than \$30,000 (64%).

Over half of the US women surveyed (58%) are aged 18-49. At 24%, those aged 35-49 made up the largest percentage of survey respondents in the 18-49 age group.



Respondent incomes were normally distributed among the various income segments.

- As we would expect, the majority of respondents have incomes of less than \$50,000 (59%).
- One-in-ten respondents reported incomes of \$100,000 or more.

