

FIT2COM

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FIT TO COMFORT

**SKILLS ALLIANCE FOR COMFORT & HEALTHY FOOTWEAR MANUFACTURING —
— NEW QUALIFICATION PROFILE AND INNOVATIVE TRAINING OPPORTUNITIES**



Co-funded by the
Erasmus+ Programme
of the European Union

PROJECT BACKGROUND

- ✓ **Ageing population**
- ✓ **Consumers' demand for differentiation and customisation**

What is a shoe?

- ✓ **The most sophisticated and complex of the fashion products**
- ✓ **More than a fashion product: prevention and relief (health)**
- ✓ **New Technologies & innovative materials**

YES, but is it ENOUGH?

Can anybody explain me...



What are footwear designers thinking?

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Survey to Consumers
“How comfortable
are your shoes?”

RESULTS



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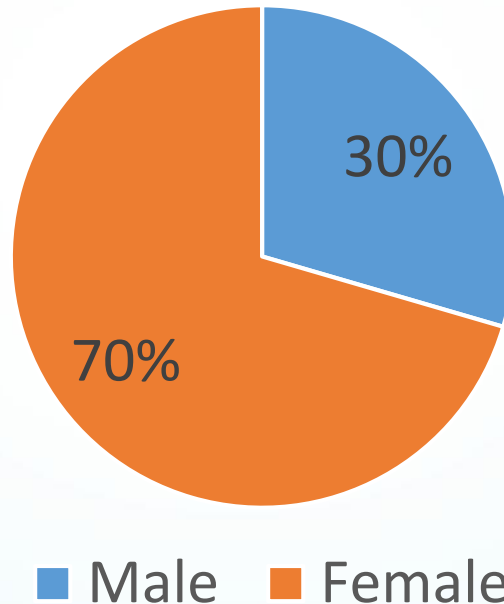
Survey to consumers

✓ **Objective:** to assess consumers' comfort needs for footwear

✓ 681 consumers living in	• Portugal:	195
	• Spain:	177
	• Germany:	92
	• Italy:	55
	• Belgium:	53
	• France:	45
	• Romania:	41
	• United Kingdom:	10
	• Others:	13

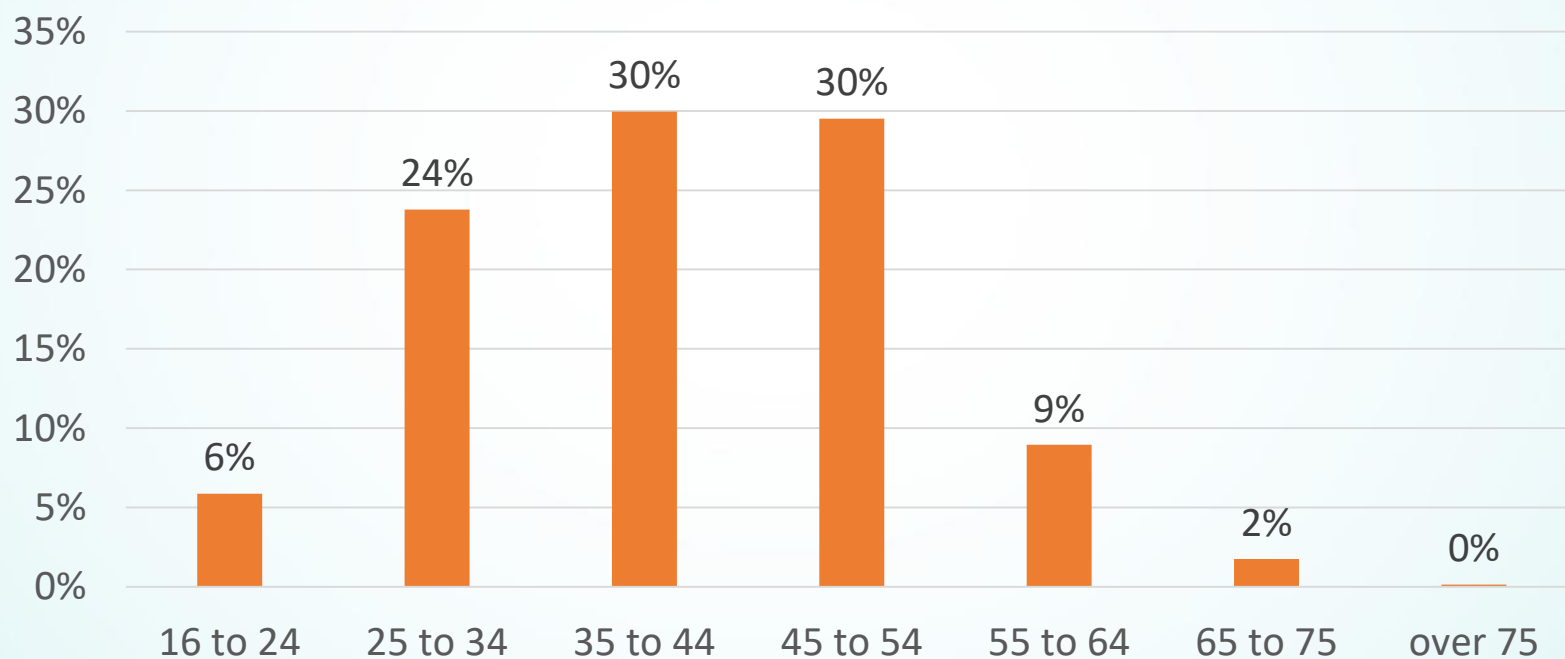
Survey to consumers - RESULTS

Question 2 - Gender



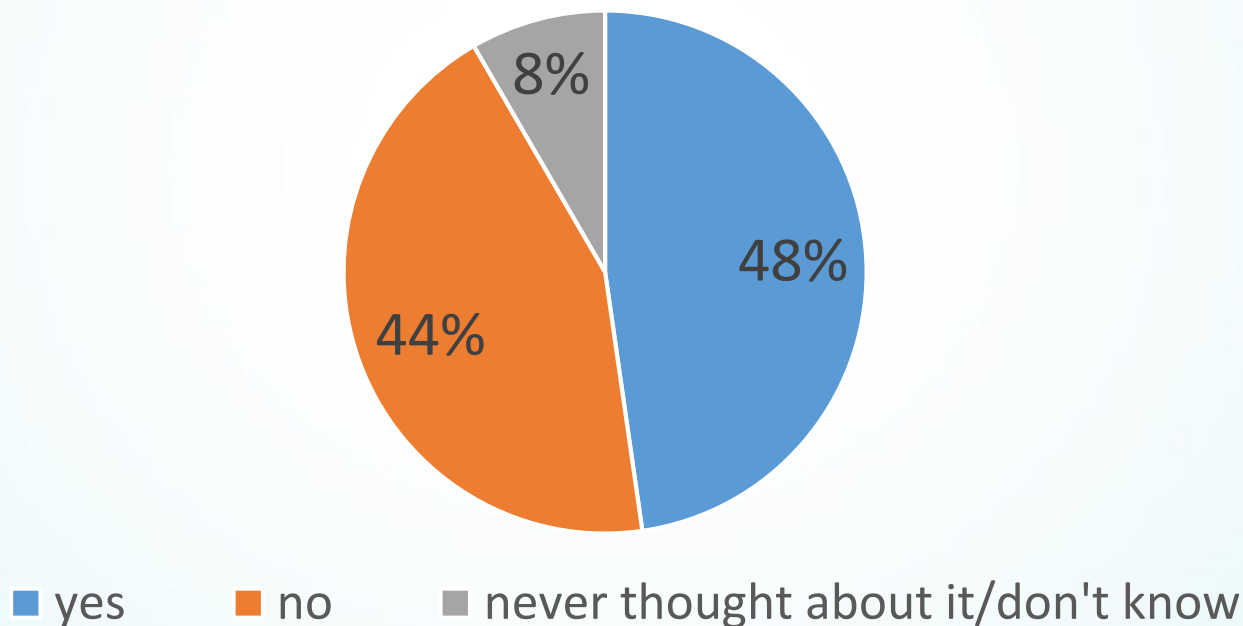
Survey to consumers

Question 3 – Age group



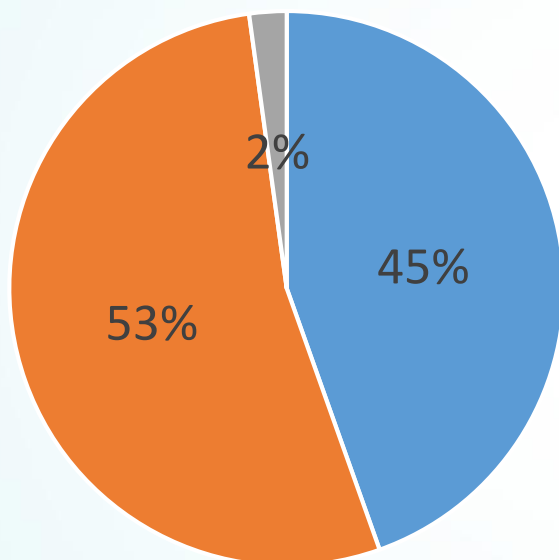
Survey to consumers

Question 4 – Do you have foot/back problems?



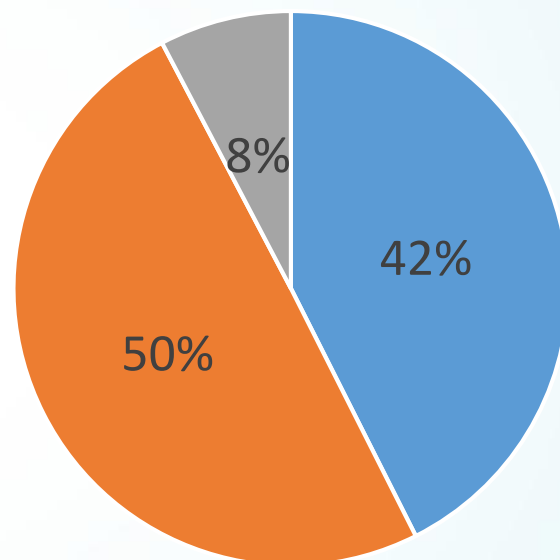
Question 4 – Do you have foot/back problems?

IN GERMANY



■ yes ■ no ■ never thought about it/don't know

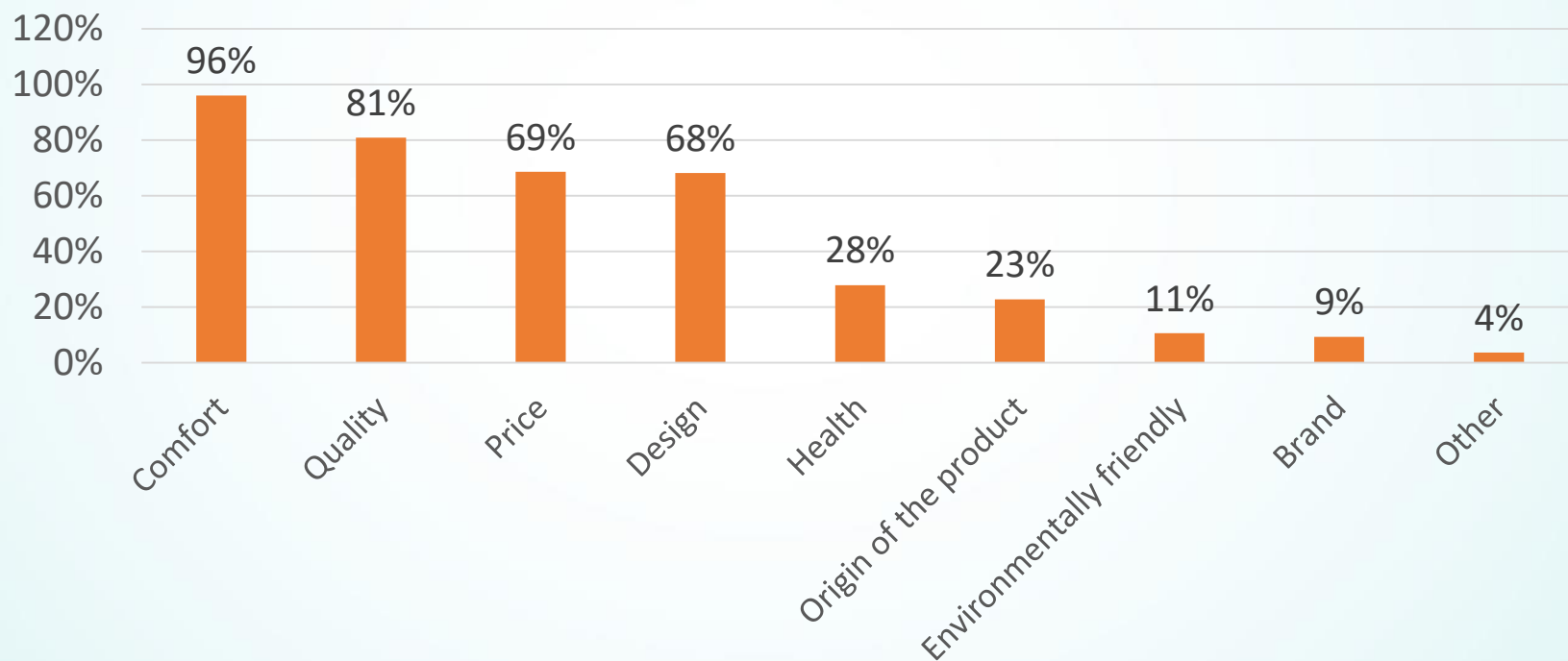
IN PORTUGAL



■ yes ■ no ■ never thought about it/don't know

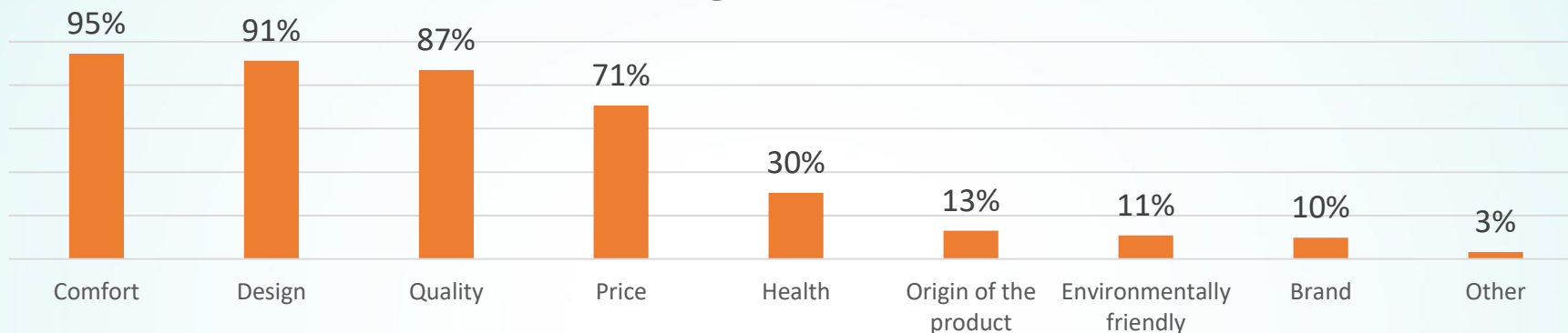
Survey to consumers

Question 5 – The four most valued aspects in shoes

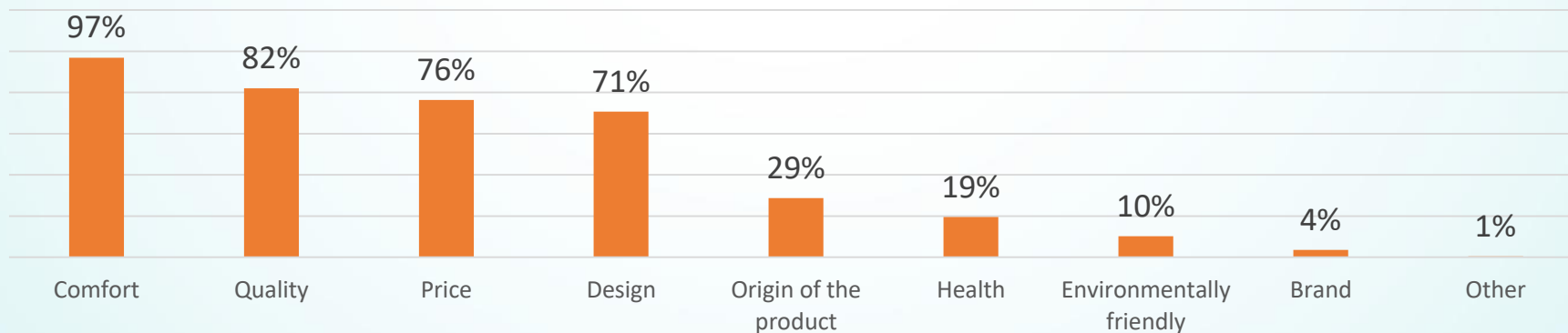


Question 5 – The four most valued aspects in shoes

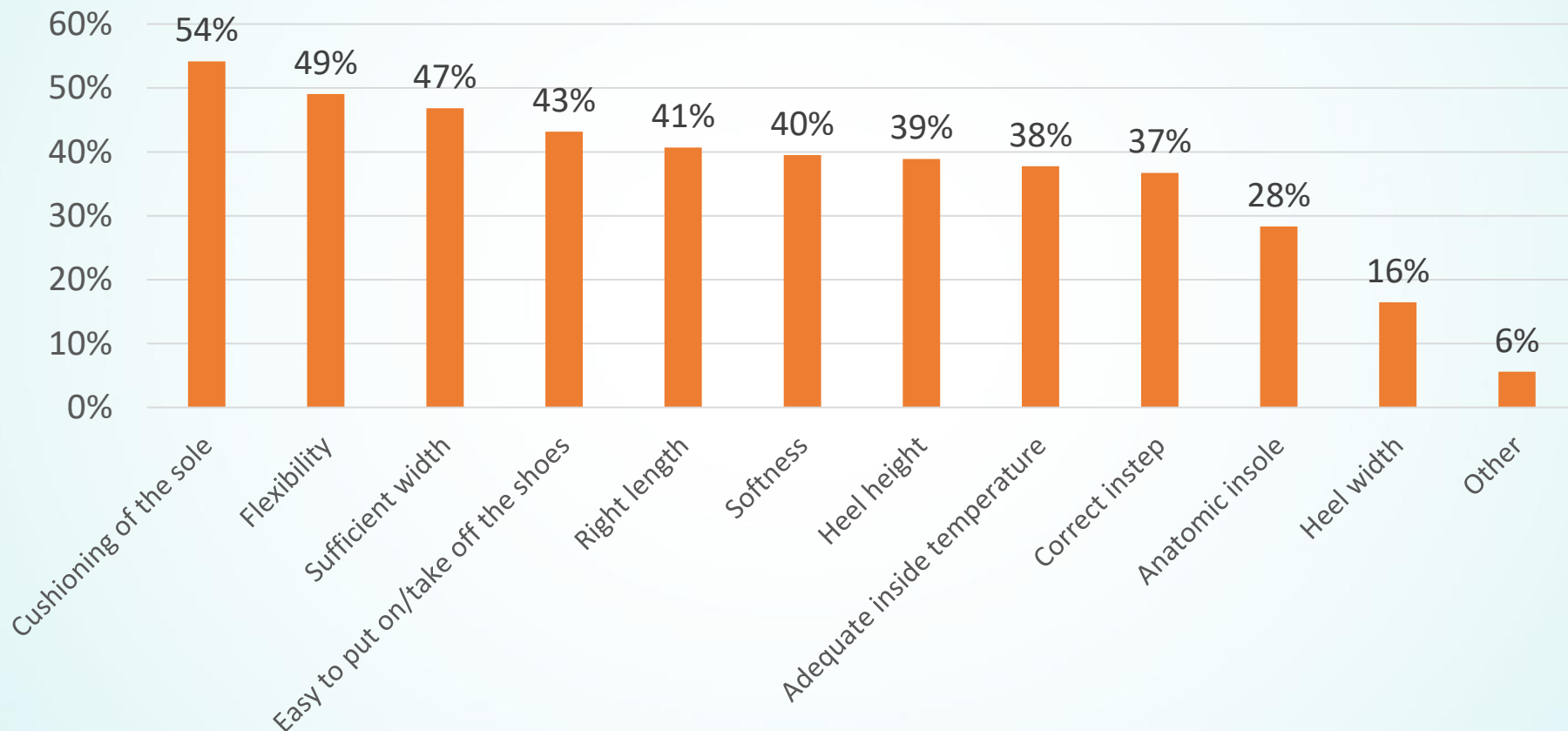
GERMANY



PORTUGAL

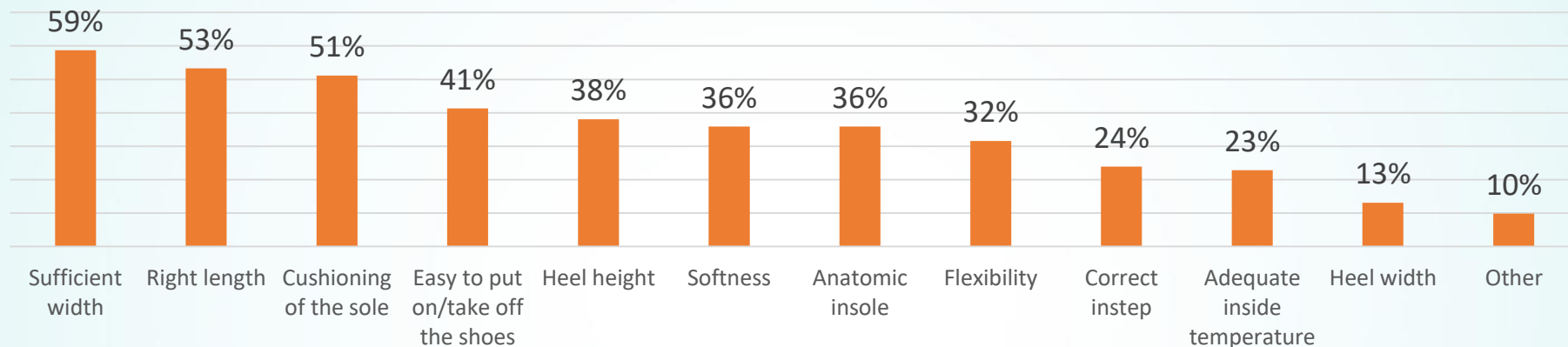


Question 6 – What makes your shoes comfortable?

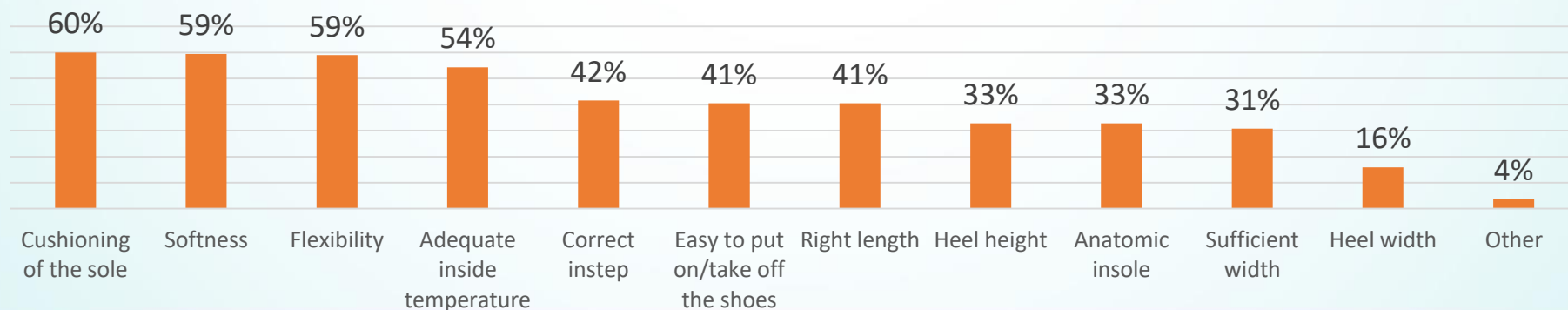


Question 6 – What makes your shoes comfortable?

GERMANY

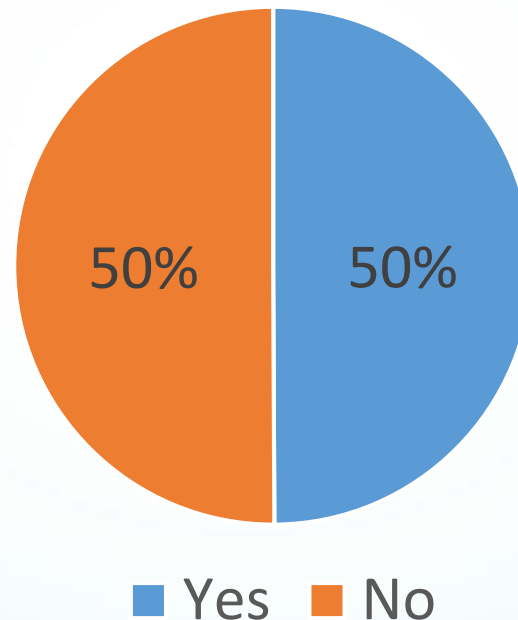


PORTUGAL



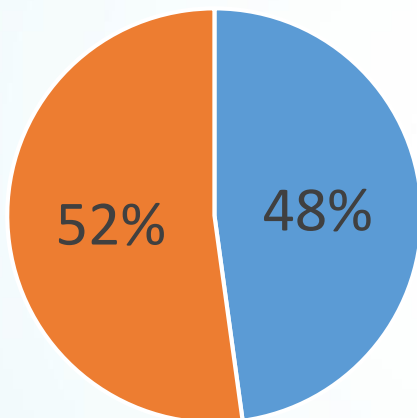
Survey to consumers

Question 7 – Do you easily find the shoes you want?



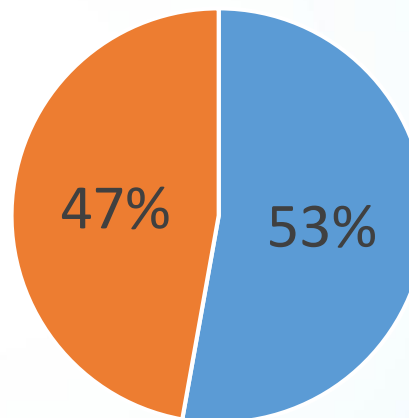
Question 7 – Do you easily find the shoes you want?

GERMANY



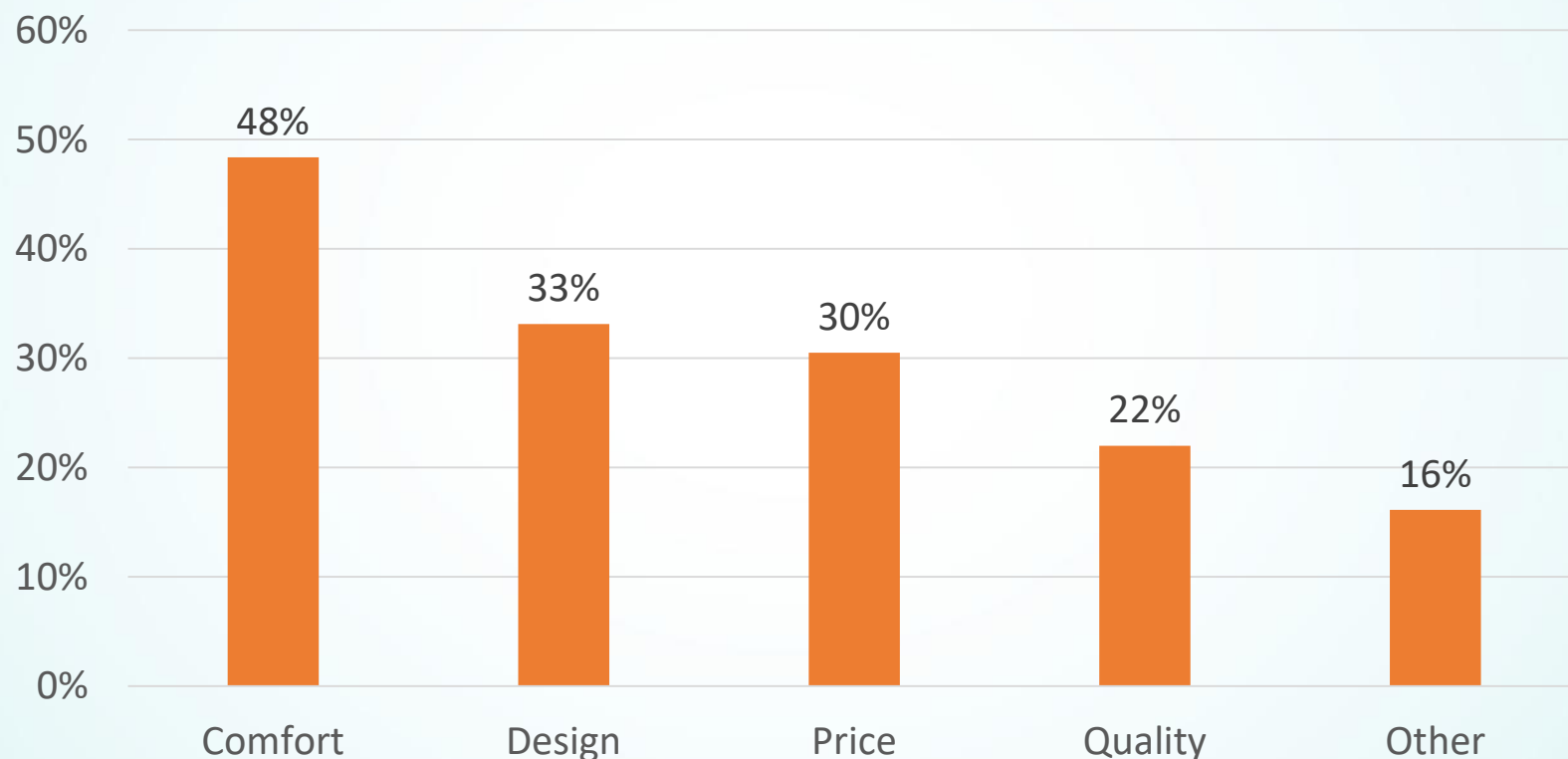
■ Yes ■ No

PORTUGAL



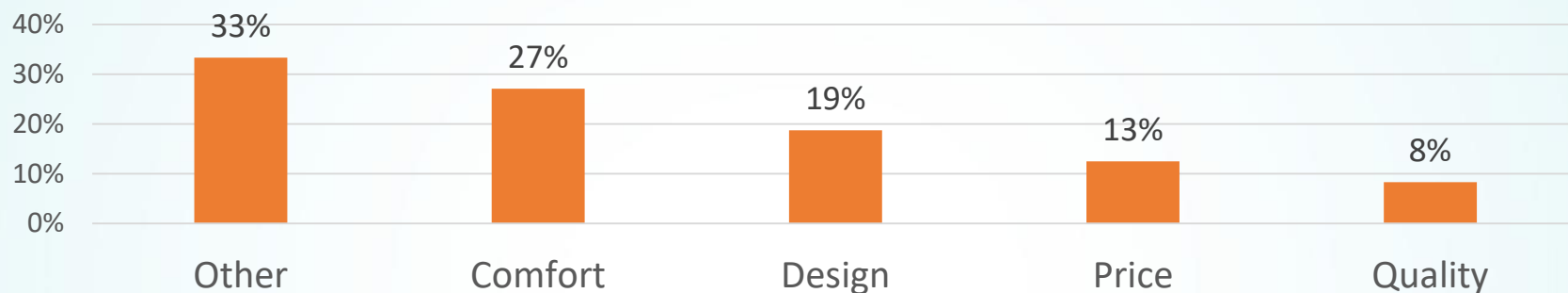
■ Yes ■ no

Question 8 – If no, what is the main reason?

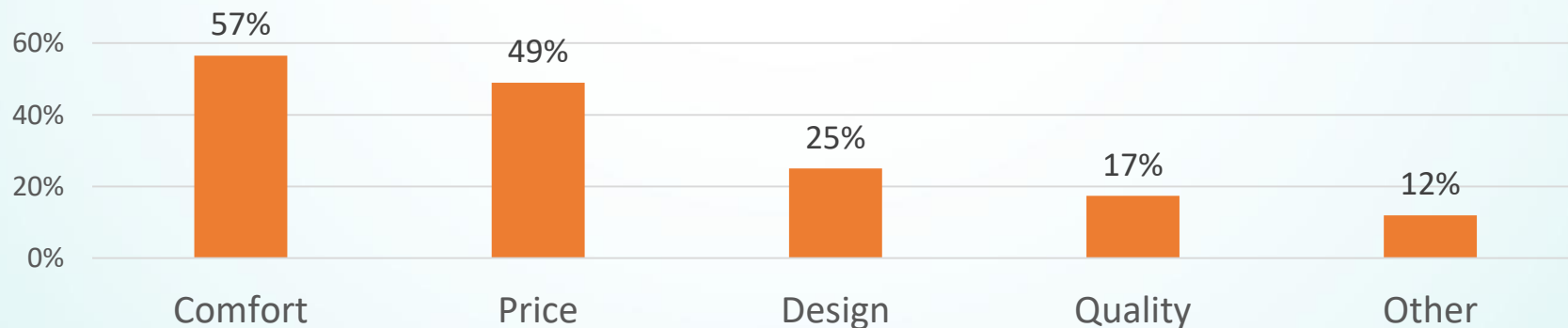


Question 8 – If no, what is the main reason?

GERMANY



PORTUGAL



Survey to consumers - CONCLUSIONS

- ✓ **48% of consumers (<24 and >54 years old) interviewed had foot/back problems → need for comfort**

- ✓ **4 aspects most valued in shoes:**
 - Comfort: 96%
 - Quality: 81%
 - Price: 69%
 - Design: 68%

- ✓ **Aspects making footwear comfortable → numerous & varied**

Survey to consumers - CONCLUSION

- ✓ **50% of consumers do not find the shoes they look for.**
- ✓ **Of those who do not find shoes, the main reason was lack of comfort (48%) → Need for greater incorporation of comfort features in footwear production in Europe.**
- ✓ **Due to differences in preferences and feet shape/ size/ sensibility, there is also a relevant need for more customisation.**

Survey to consumers - CONCLUSION

Germany vs Portugal

- ✓ **Comfort was the most valued** footwear feature in Germany (95%) and in Portugal (97%)
- ✓ In **2nd place**, consumers in **Germany** valued **design** and those in **Portugal** valued **quality**
- ✓ In Germany, “**sufficient width**” was the most popular comfort aspect and in Portugal, it was “**cushioning of the sole**”
- ✓ **52%** of consumers living in Germany cannot easily find the shoes they look for, and in Portugal there were **47%**.
- ✓ In both countries, the main reason was **insufficient comfort**, followed by **design** in Germany and **price** in Portugal.

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SURVEY TO COMPANIES

RESULTS



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Survey to companies on installed capacity to introduce Comfort & Healthy features in Footwear

- ✓ **Objective:** to assess companies' approach to comfort features in their product strategy and their willingness to include health and comfort features in their future products
- ✓ **75 companies:**
 - Portugal: 27
 - Spain: 16
 - Romania: 21
 - Germany: 9
 - Sweden: 1
 - Italy: 1

Section I: General Information

✓ Does your company have a nominee with exclusive responsibilities in comfort & health topics?

- NO: 55/75
- YES: 20/75

✓ If yes, in which department?

- **Product engineering:** 10/20
- Production/operations: 7/20
- Quality: 4/20
- Marketing: 2/20
- Sales: 2/20
- Other: Management, all departments related to production, product engineering/design, industry strategy

Section I: General Information

✓ If yes, which is his/her qualification profile?

- Expert/specialist: 11/20
- Technician: 6/20
- University graduate: 2/20
- Operator: 1/20
- Other: Admin, biomechanic, orthopaedic shoemaker, project manager

✓ His/her specific responsibilities:

- production, chief of technical operations, development of products and improvement, development of samples, development of lasts and selection of materials, find innovative solutions to increase comfort, product design, quality and management of suppliers, quality management, etc.

Section I: General Information

- ✓ If no, does your company have a technician skilled in comfort/related?
 - NO: 37/55
 - YES: 19/55

- ✓ Number of employees:
 - 10-50: 26/75
 - 51-100: 21/75
 - 101-250: 14/75
 - > 250: 8/75
 - 1-9: 6/75

Section I: General Information

✓ N° of pairs sold per day last year:

- 150-500: 23/75
- < 150: 17/75
- >1500: 16/75
- 501-750: 8/75
- 751-1000: 4/75
- 1000-1500: 4/75

✓ Average selling price per pair (factory price):

- 30-50 €: 27/75
- 20-30 €: 21/75
- >50 €: 21/75
- 10-20 €: 4/75
- < 10 €: 1/75

Section I: General Information

✓ Which target group & type of shoes does your company produce/sell?

Target group:

- Ladies' shoes: 59/75
- Men's shoes: 35/75
- Children's shoes: 20/75
- Seniors' shoes: 11/75

Type of shoes:

- Casual shoes: 42/75
- High fashion: 36/75
- Winter footwear: 28/75
- Summer footwear: 27/75
- Comfort shoes: 26/75
- Sports shoes: 17/75
- Outdoor and hiking shoes: 9/75
- Orthopaedics: 9/75
- Occupational and safety: 8/75
- Other, specify: vegan, othotics, slippers, theatre and film, sandals

Section I: General Information

- ✓ By 2020, which global trend could become a problem/threat for your company?:
- Shortage of skilled workers: 52/75
 - Scarcity of raw materials/increasing prices: 36/75
 - Increasing demand for customisation (partial/whole): 19/75
 - Ageing of the population: 16/75
 - Increasing demand for attractive sportswear: 15/75
 - Increasing demand for responsible (green & social) products: 15/75
 - Rapid market changes: 11/75
 - Increasing demand for comfort: 11/75
 - Re-shoring: 6/75
 - Global population growth: 1/75
 - Other : test requirements, internet sales, price of product, unverified imports from China, costs, cheap imported products, and price pressure from Asian competition

Section I: General Information

- ✓ By 2020, which global trend could become an opportunity?:
- Online sales: 49/75
 - Introduction of new/innovative materials: 43/75
 - Opening of new markets through elimination of trade barriers: 40/75
 - Increasing demand for comfort: 37/75
 - Increasing demand for responsible (social & green) products: 28/75
 - Increasing demand for customisation (full or partial): 23/75
 - Increasing demand for attractive sportswear: 22/75
 - Global population growth: 19/75
 - Re-shoring: 13/75
 - Rapid market changes: 13/75
 - Ageing of population: 11/75
 - Other: high purchasing power in China, industrial shoe manufacturing

Section II: Innovation and Training Needs

✓ What companies consider customers value most:

- High comfort: 53/75
- Price: 47/75
- Durability/wear resistance: 46/75
- Brand: 42/75
- Origin of product to ensure standards have been met: 39/75
- Fashion: 39/75
- Health and wellness: 36/75
- Origin of product to support national/local economy: 15/75
- Green production: 15/75

Section II: Innovation and Training Needs

- ✓ **Most important aspects** for consumers according to companies (nº of companies which qualified an aspect as “high importance”):
 - **Fitting:** 70/75
 - **Ease of walking:** 66/75
 - **Whole shoe flexibility:** 63/75
 - **Footwear stability:** 63/75

- ✓ **Least important aspects** for consumers according to companies (nº of companies which qualified an aspect as “low importance”):
 - **Washable:** 36/75
 - **High sole density:** 31/75
 - **Stiffness of toe puffs & counters:** 28/75

Section II: Innovation and Training Needs

✓ Comfort/healthy topics your products would benefit from/you would like to introduce in your product:

- | | |
|---|--------------|
| • Fitting: | 34/75 |
| • Sweat absorption & release features: | 33/75 |
| • Slip resistance: | 33/75 |
| • Flexibility of the sole: | 30/75 |
| • Breathability: | 30/75 |
| • Controlled plantar pressure distribution: | 28/75 |
| • Fitness for purpose: | 28/75 |
| • Flexibility of the whole shoe: | 27/75 |
| • Shoe impact absorption: | 26/75 |
| • Control of the in-shoe odour: | 26/75 |
| • In-shoe thermal comfort: | 25/75 |
| • Ease of walking: | 25/75 |
| • Controlled weight: | 24/75 |
| • Controlled stability: | 23/75 |

Section II: Innovation and Training Needs

- ✓ **Comfort/healthy topics that** your products would benefit from/you would like to introduce in your product (continued):
- Removable foot beds: 23/75
 - Easy to put on/take off: 22/75
 - Softness of the upper: 21/75
 - Microbial resistance: 21/75
 - Flexibility of the upper: 19/75
 - Controlled hardness of sole: 16/75
 - Inclusion of product info: 14/75
 - Density of the sole: 12/75
 - Addition of fragrances: 8/75

Section II: Innovation and Training Needs

- ✓ Health/comfort skills **most missed by companies**:
 - Podiatry and biomechanics (65/75 companies had a shortage of this skill)
 - Foot problems and solutions (59/75 had a shortage)
 - Sports shoes features (51/75 had a shortage)
- ✓ Among those companies missing health/comfort skills, the majority agreed that:
 - Foot problems & solutions skills were of high importance
 - Podiatry and biomechanics skills were of medium importance
 - Sports shoes features skills were of low importance

Section II: Innovation and Training Needs

- ✓ If your company does not have a nominee with exclusive responsibilities in comfort and health, **which qualification profile** would your company benefit from to develop comfort features?:
 - **Expert/specialist:** 41/55
 - Technician: 17/55
 - University graduate: 15/55
 - Operator: 1/55

- ✓ What should be his **responsibilities**?: development of comfort shoes for children, development and production control, define processes, develop and test products, analysing existing products, market analysis, product research, quality control, podiatry and biomechanics

- ✓ What would be your **company's comfort priority**?: combine stylish design and comfort, improve flexibility of sole, improve breathability, etc.

CONCLUSION

- ✓ A large majority of companies do not have an employee with exclusive responsibilities in comfort & health topics
 - ✓ A **shortage of skilled workers** is seen by companies as their **biggest challenge**
 - ✓ A majority of companies believe that **comfort is the most valued feature of footwear** by consumers
 - ✓ The **fitting** is the footwear aspect that companies consider **consumers most value** and the aspect companies' products would most benefit from
 - ✓ The **highest skills shortage** is in **podiatry & biomechanics AND foot problems and solutions**
- There is a clear need for skilled technicians in comfort & health

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**TO SUPPORT EUROPEAN
SMES TO INTRODUCE
COMFORT AND HEALTHY
FEATURES IN THEIR
FASHIONABLE PRODUCTS IN
ORDER TO ENHANCE THEIR
COMPETITIVENESS AND
ADDED VALUE**



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of the European Union

A PRIVATE-PUBLIC PARTNERSHIP

PORTUGAL



SPAIN



ROMANIA



GERMANY



BELGIUM



Programme: Erasmus+, Sector Skills Alliance

Duration: November 2015 – October 2018

Objective: To create, pilot, and certify a new qualification profile and corresponding ICT and work-based training to address the identified skills and competences gap in comfort and healthy footwear.

Expected outcomes:

- Certified profile and training on Comfort and Healthy footwear
- New cluster of Moda Comfort
- New research projects in this field
- New demand in components for comfort & healthy footwear
- Response to consumers' demands → More comfortable fashionable shoes available!

THANK YOU FOR YOUR ATTENTION

ANY QUESTIONS?

**Carmen Arias Castellano
Secretary General**



**Confédération Européenne de l'Industrie de la Chaussure
European Confederation of the Footwear Industry**