

JULY 2019

- UK RETAIL VOL 5 Audience: 1.000+ UK Consumers

KEY TAKEAWAYS:

TK MAXX CUSTOMERS SHIFTING ONLINE (MAJORITY STILL SHOP IT IN-STORES). ASOS GAINING RESPONDENTS WHO SHOP IT AND INCREASING MINDSHARE.

AMAZON UK APPAREL SHOPPERS SHIFTING FROM "REGULARLY" TO "OCCASIONALLY". NIKE SHOWED MARKED IMPROVEMENT OVER THE PAST YEAR, ESPECIALLY IN SENTIMENT WARS VS. ADIDAS.

USAGE OF BOTH DELIVEROO AND JUST EATS ARE TRENDING HIGHER (JUST EATS STILL USED BY MORE RESPONDENTS). MORE CONSUMERS WOULD LIKE TO CUT BACK ON GROCERY SPEND, BUT THE % WHO SAID THEY COULD SPEND MORE HAS INCREASED. RETAILERS

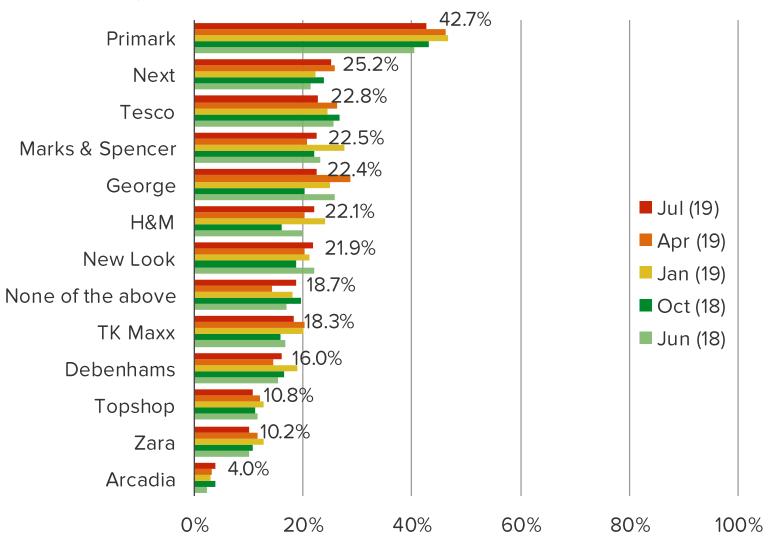
RETAILERS

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UK Retailers

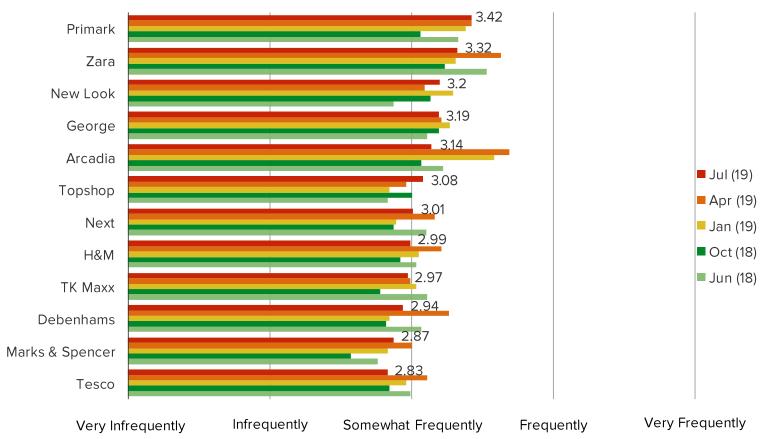
HAVE YOU PURCHASED CLOTHING OR APPAREL ITEMS FROM THE FOLLOWING IN THE PAST YEAR?

Posed to all respondents



UK Retailers

HOW OFTEN DO YOU BUY CLOTHING OR APPAREL FROM THIS RETAILER?

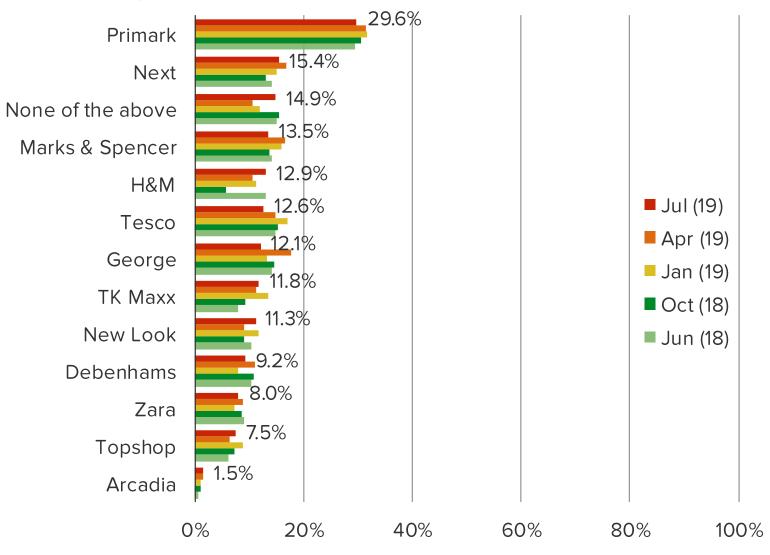


Posed to respondents who purchased anything from the following in the past year.

UK Retailers

OF THE FOLLOWING RETAILER, WHICH TWO WOULD YOU SAY ARE YOUR FAVORITE?

Posed to all respondents



UK Retailers

WHY ARE THEY YOUR FAVORITE? (FILL-IN)

Posed to respondents whose favorite retailer is at least one of the following.

Primark

GOODVALUE PRICE LOWPRICES CHEAPANDCHEERFUL



George



Marks & Spencer

Debenhams

Tesco



Next





UK Retailers

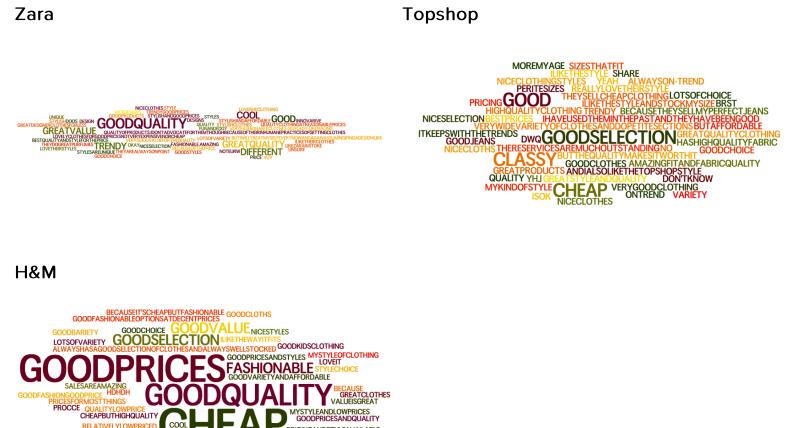
WHY ARE THEY YOUR FAVORITE? (FILL-IN)

Posed to respondents whose favorite retailer is at least one of the following.

TK Maxx

New Look





ASHION GOODSECTION CLOSETOWORK TRENDY GOODQUALITYCLOHESREASONABLEPRICE GOODCHOICEANDREASONABLEPRICE

PRICINGANDSTYLEAVAILABLE

SINDIFFERENTCOLOURS

RELATIVELYLOWPRICED DON'TKNOW ANDGOODPRICING

MYFASHION GOODS

VEPLUSSIZERANGE

UK Retailers

WHY DON'T YOU SHOP HERE? (FILL-IN)

Posed to respondents whose favorite retailer is at least one of the following.

Primark

Tesco



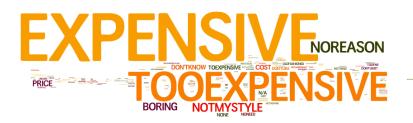
George

Marks & Spencer



Next

Debenhams





UK Retailers

WHY DON'T YOU SHOP HERE? (FILL-IN)

Posed to respondents whose favorite retailer is at least one of the following.

TK Maxx

New Look





Zara

Topshop



H&M

Arcadia

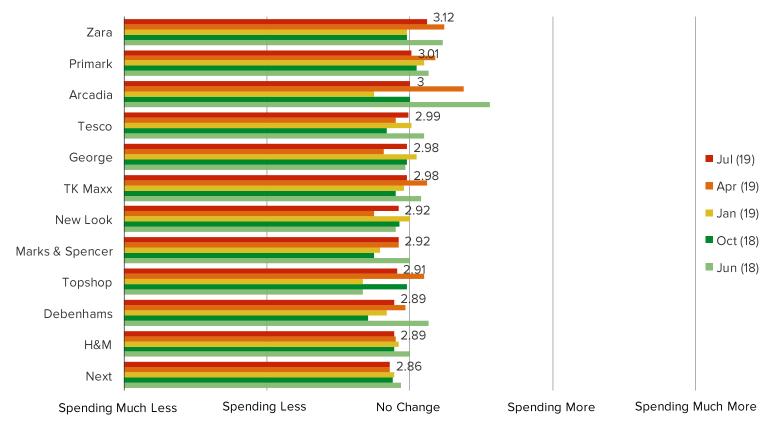




UK Retailers

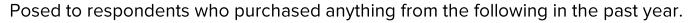
HAVE YOU CHANGED HOW MUCH YOU ARE SPENDING AT THIS RETAILER OVER THE PAST YEAR?

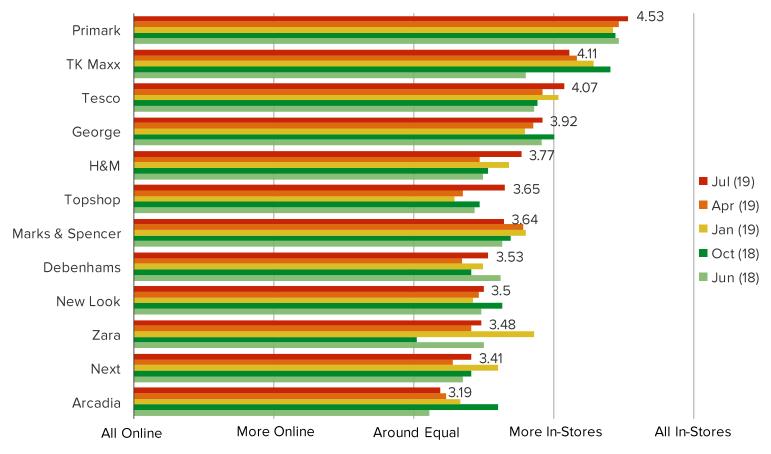
Posed to respondents who purchased anything from the following in the past year.



UK Retailers

WHEN YOU BUY FROM THIS RETAILER, DO YOU TYPICALLY DO SO IN-STORES OR ONLINE?





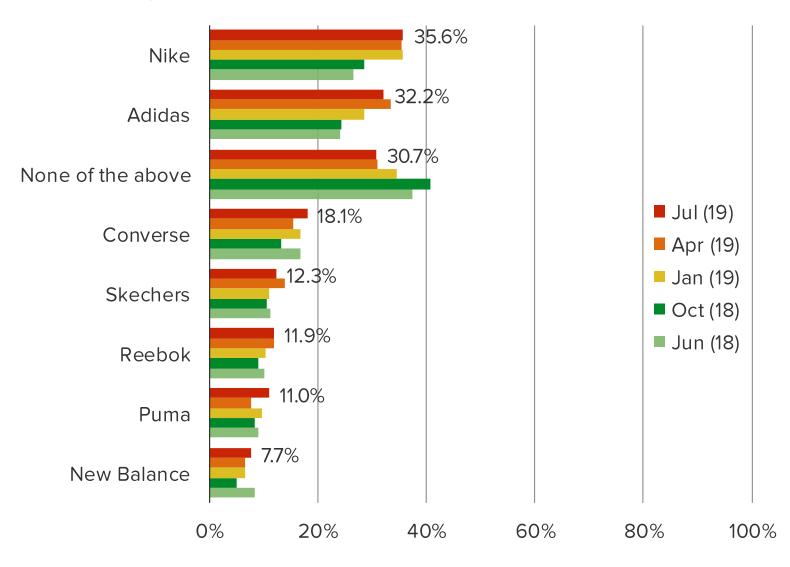
FOOTWEAR BRANDS

FOOTWEAR BRANDS

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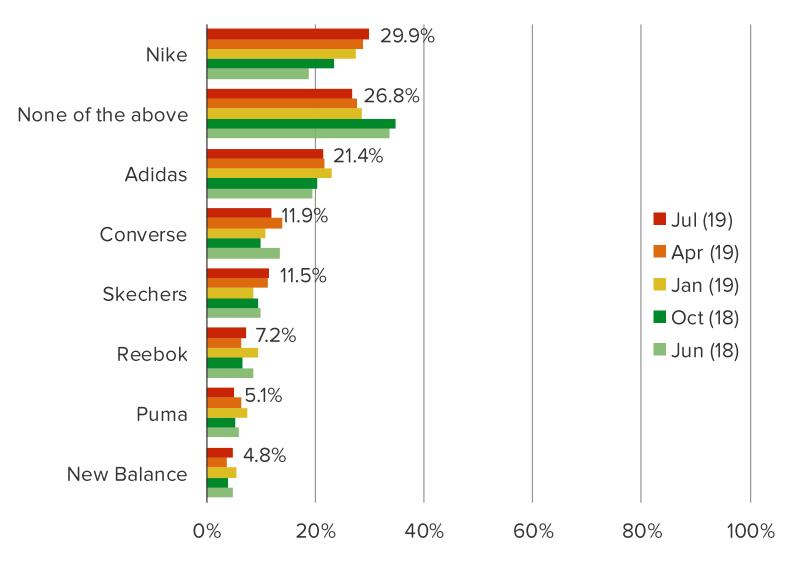
DO YOU OWN SNEAKERS FROM ANY OF THE FOLLOWING BRANDS? (SELECT ALL THAT APPLY)

Posed to all respondents.



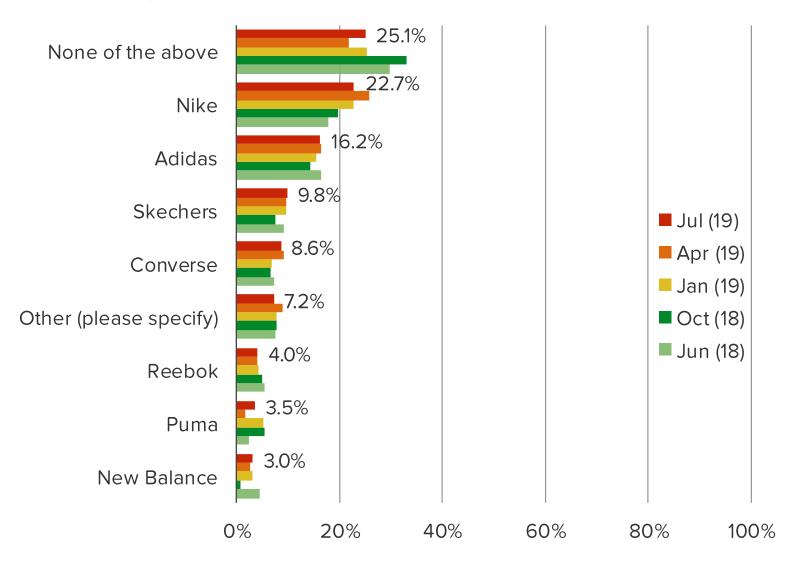
WHICH IS YOUR FAVORITE FOOTWEAR BRAND?





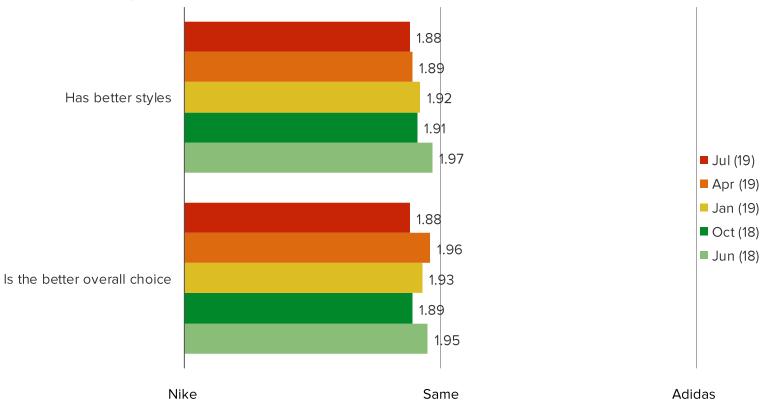
THINKING ABOUT YOUR MOST RECENT SNEAKER PURCHASE, WHICH BRAND DID YOU CHOOSE?

Posed to all respondents.



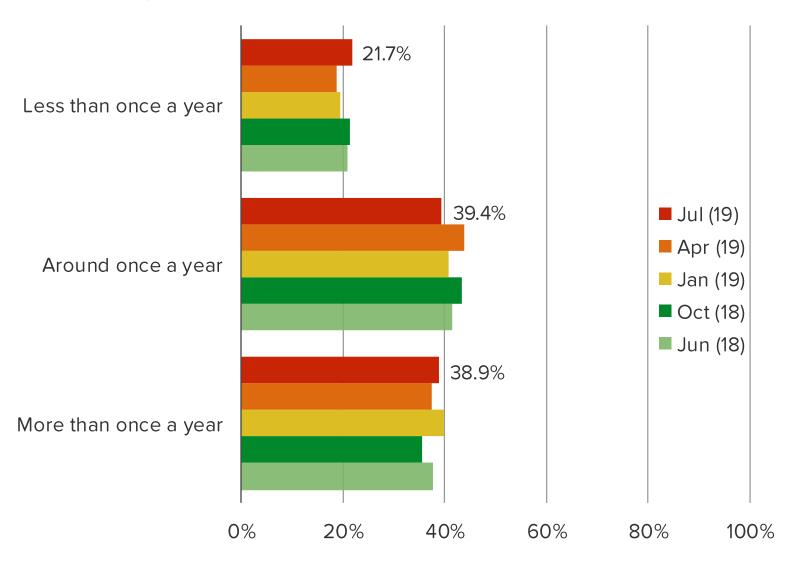
IN YOUR OPINION, WHICH OF THE FOLLOWING:





IN GENERAL, HOW OFTEN DO YOU BUY FOOTWEAR?

Posed to all respondents.



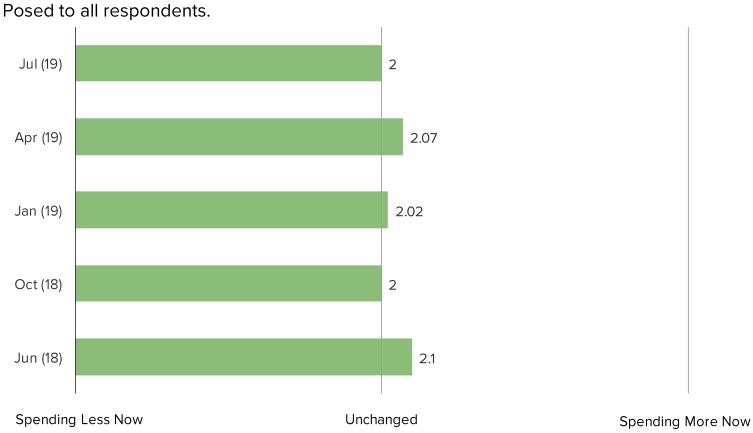
GROCERY STORES AND FOOD DELIVERY

GROCERY STORES AND FOOD DELIVERY

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Grocery Stores and Food Delivery

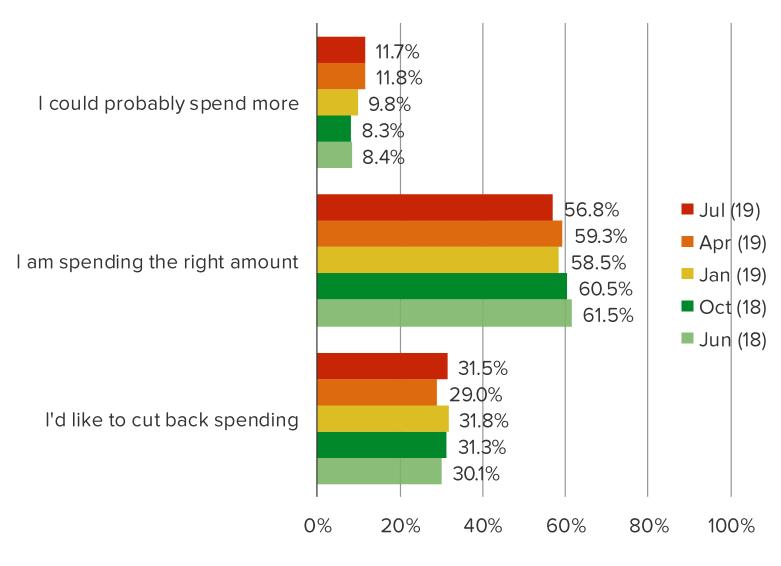
IN GENERAL, WOULD YOU SAY YOUR GROCERY SPENDING HAS CHANGED OVER **THE PAST YEAR?**



Grocery Stores and Food Delivery

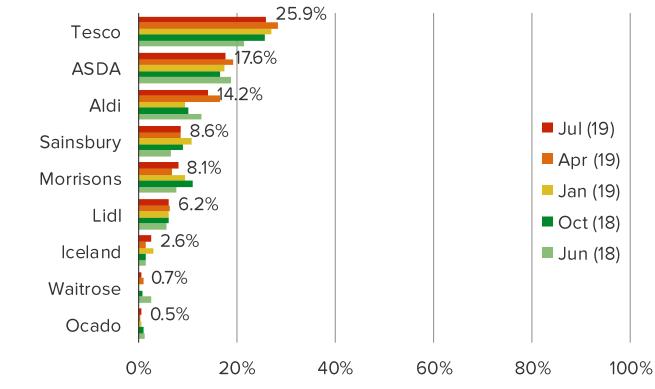
DO YOU THINK YOU CURRENTLY SPEND THE RIGHT AMOUNT ON GROCERIES?

Posed to all respondents.



Grocery Stores and Food Delivery

WHAT IS YOUR MAIN GROCERY STORE AND WHY DO YOU SHOP THERE? (FILL-IN)



Posed to all respondents.

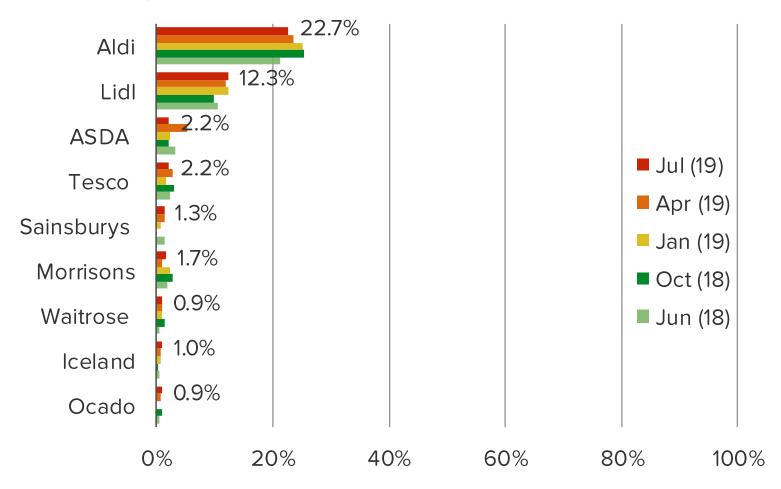
WHY DO YOU SHOP THERE?



Grocery Stores and Food Delivery

ARE THERE ANY GROCERS THAT IN YOUR OPINION ARE GAINING POPULARITY WITH CONSUMERS? (FILL-IN)

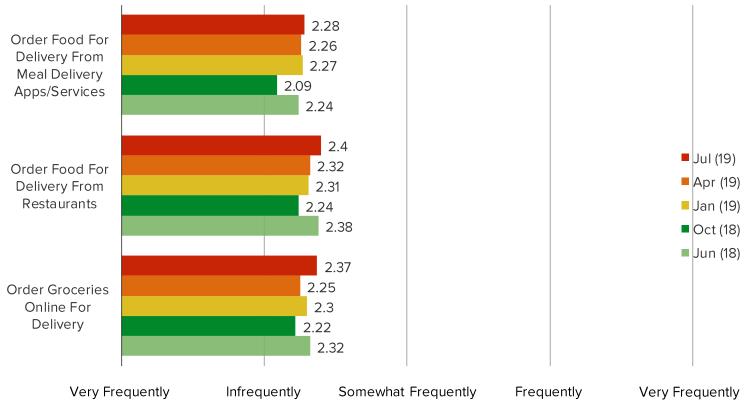
Posed to all respondents.



Grocery Stores and Food Delivery

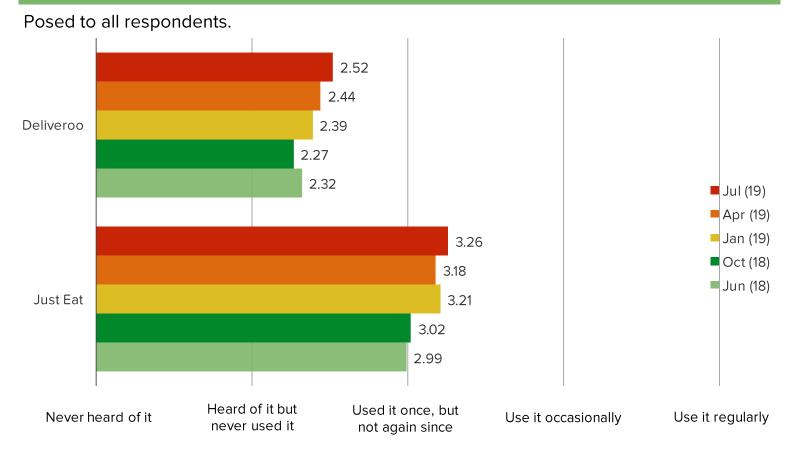
HOW OFTEN DO YOU...

Posed to all respondents.

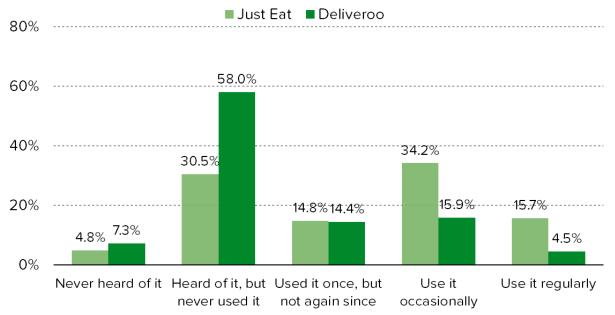


Grocery Stores and Food Delivery

WHAT IS YOUR EXPERIENCE WITH THE FOLLOWING MEAL DELIVERY APPS/SERVICES?



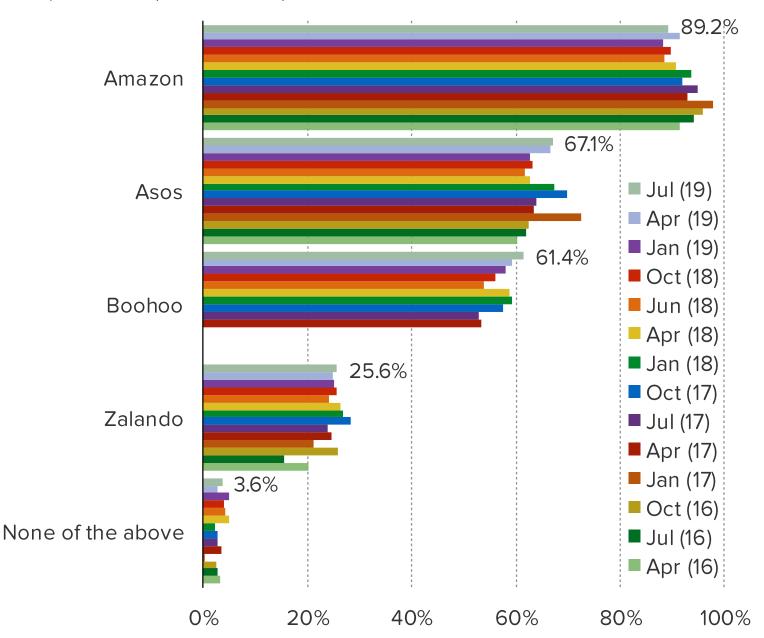
JULY 2019 BREAKDOWND:



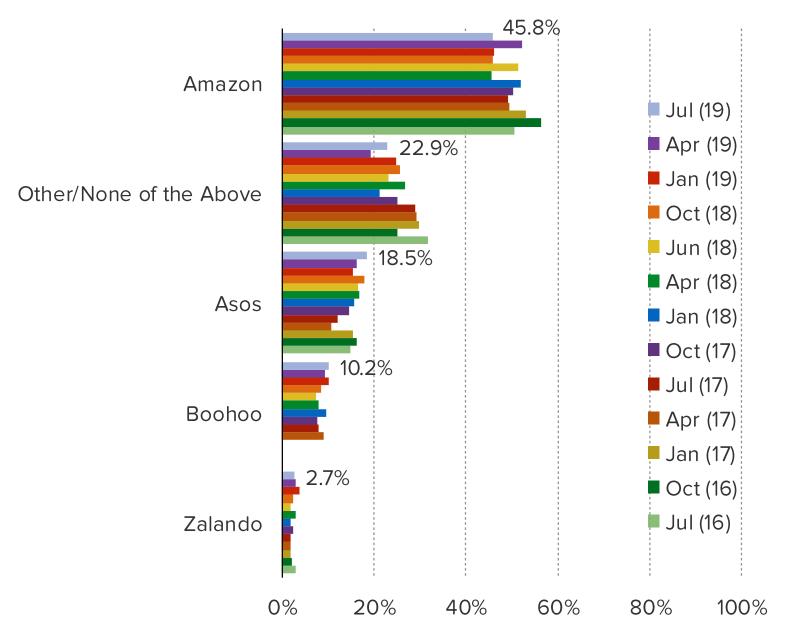
UK ONLINE APPAREL TRACKERS

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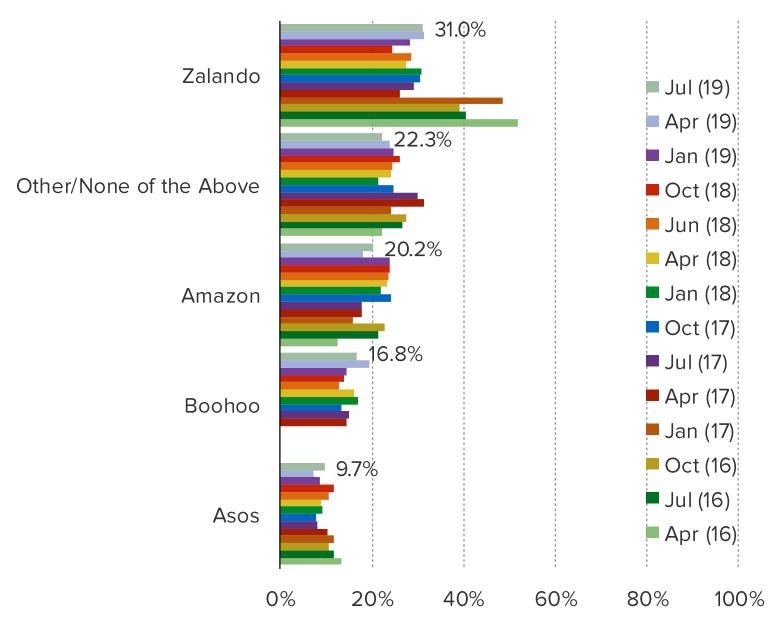
AWARENESS



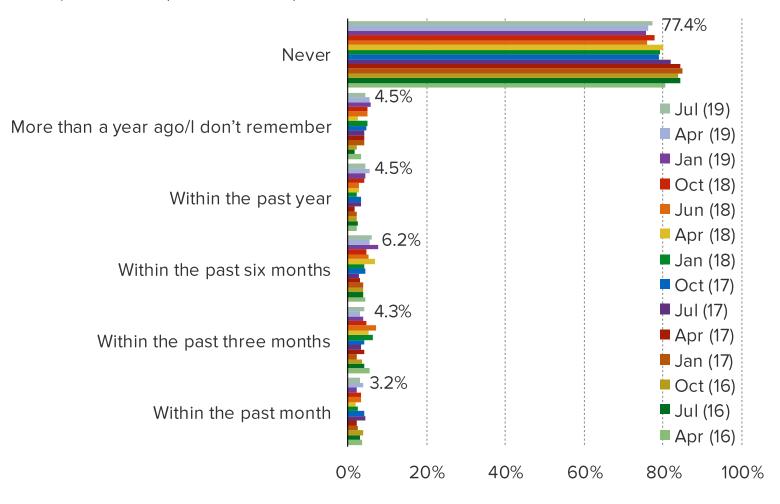
IF YOU WERE SHOPPING ONLINE FOR APPAREL, WHICH OF THE FOLLOWING WOULD YOU BE MOST LIKELY TO PURCHASE FROM?



IF YOU WERE SHOPPING ONLINE FOR APPAREL, WHICH OF THE FOLLOWING WOULD YOU BE LEAST LIKELY TO PURCHASE FROM?

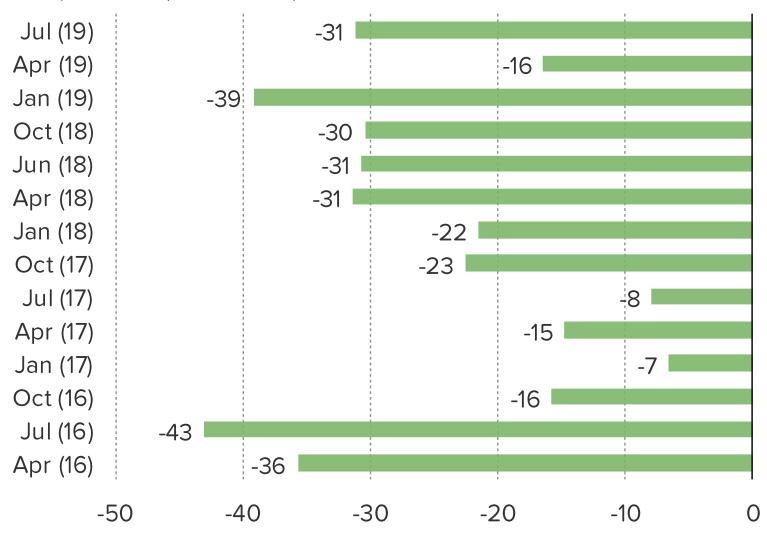


WHEN IS THE LAST TIME YOU PURCHASED SOMETHING FROM ZALANDO?



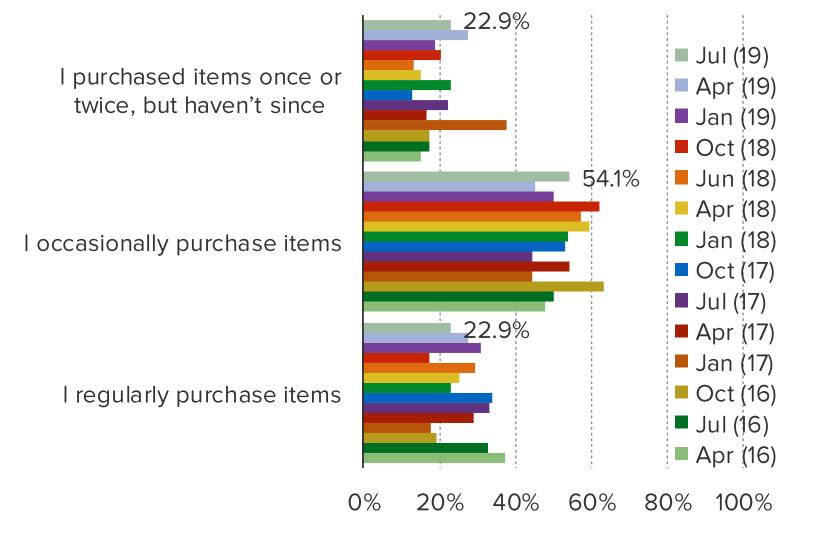
European E-Commerce

NET PROMOTER SCORE - ZALANDO

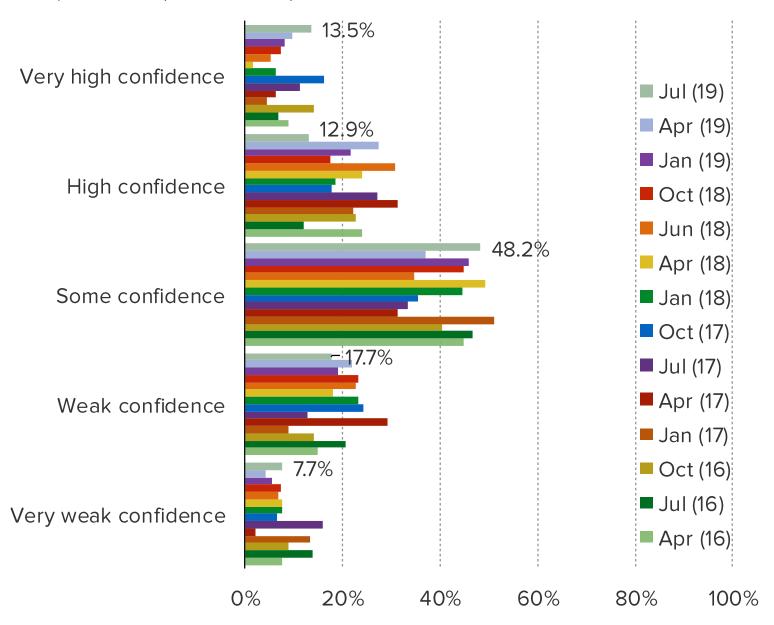


European E-Commerce

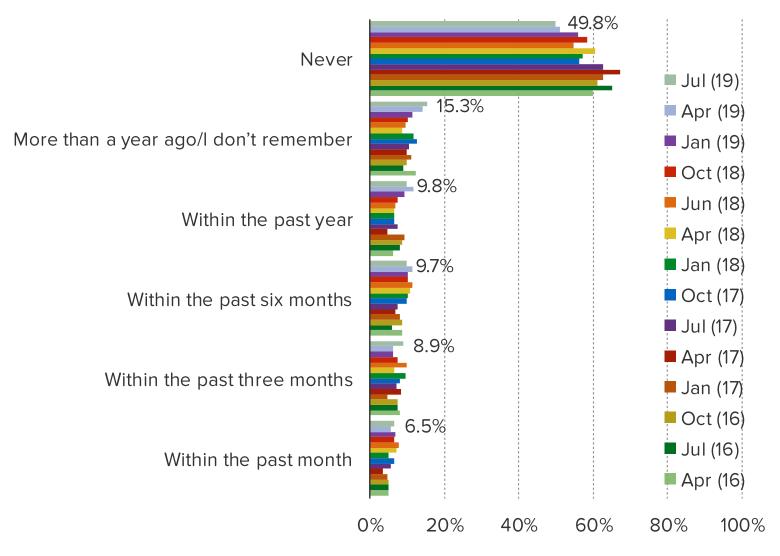
WHICH OF THE FOLLOWING WOULD DESCRIBE HOW OFTEN YOU TYPICALLY PURCHASE FROM ZALANDO?



WHEN YOU SHOP AT ZALANDO, HOW CONFIDENT ARE YOU THAT YOU WILL GET THE BEST POSSIBLE PRICE FOR WHAT YOU BUY?

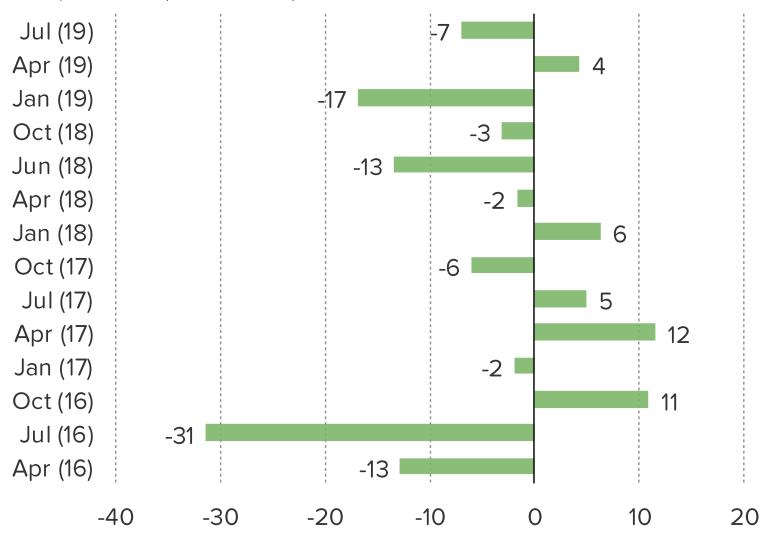


WHEN IS THE LAST TIME YOU PURCHASED SOMETHING FROM ASOS?



European E-Commerce

NET PROMOTER SCORE - ASOS



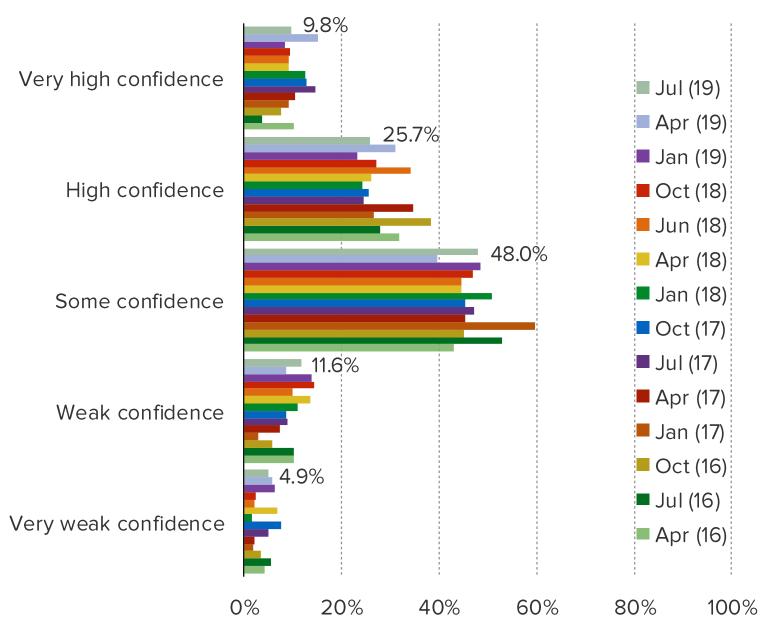
European E-Commerce

WHICH OF THE FOLLOWING WOULD DESCRIBE HOW OFTEN YOU TYPICALLY PURCHASE FROM ASOS?

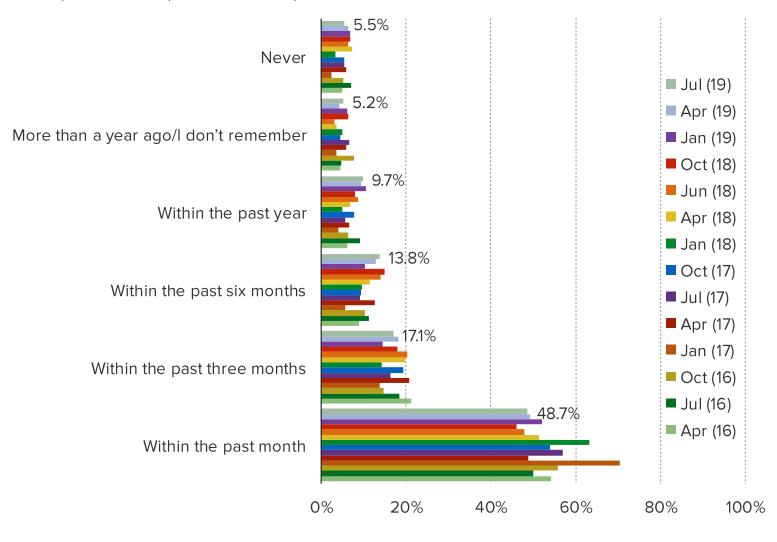
This question was posed to all respondents.

22.3% Jul (19) Apr (19) I purchased items once or Jan (19) twice, but haven't since Oct (18) Jun (18) 57.8% Apr (18) Jan (18) I occasionally purchase items Oct (17) ■ Jul (17) Apr (17) 19.9% Jan (17) Oct (16) I regularly purchase items Jul (16) Apr (16) 0% 20% 40% 60% 80% 100%

WHEN YOU SHOP AT ASOS, HOW CONFIDENT ARE YOU THAT YOU WILL GET THE BEST POSSIBLE PRICE FOR WHAT YOU BUY?

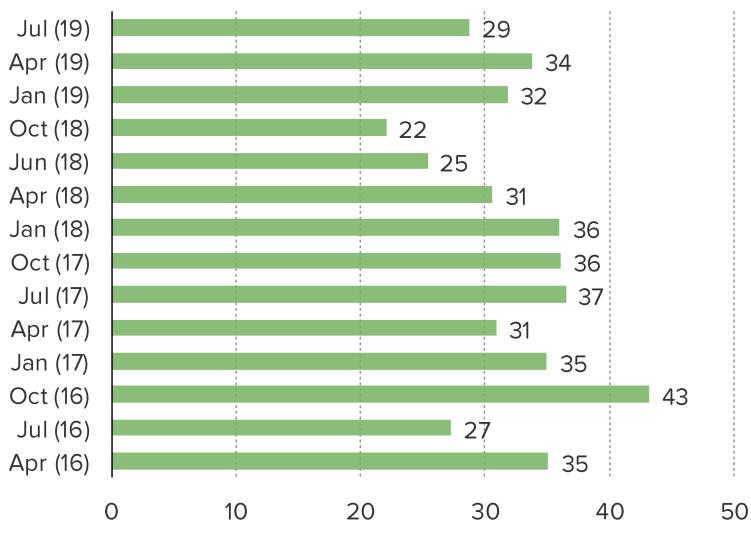


WHEN IS THE LAST TIME THAT YOU PURCHASED SOMETHING FROM AMAZON?



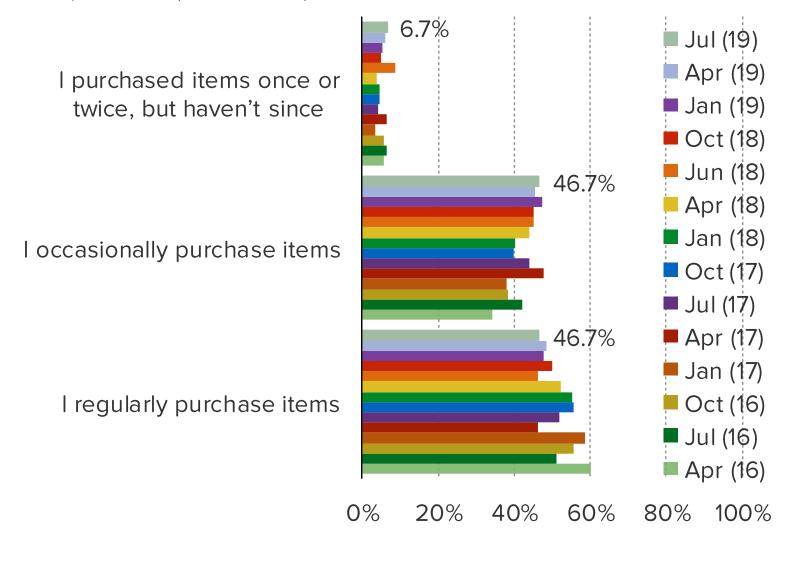
European E-Commerce

NET PROMOTER SCORE – AMAZON

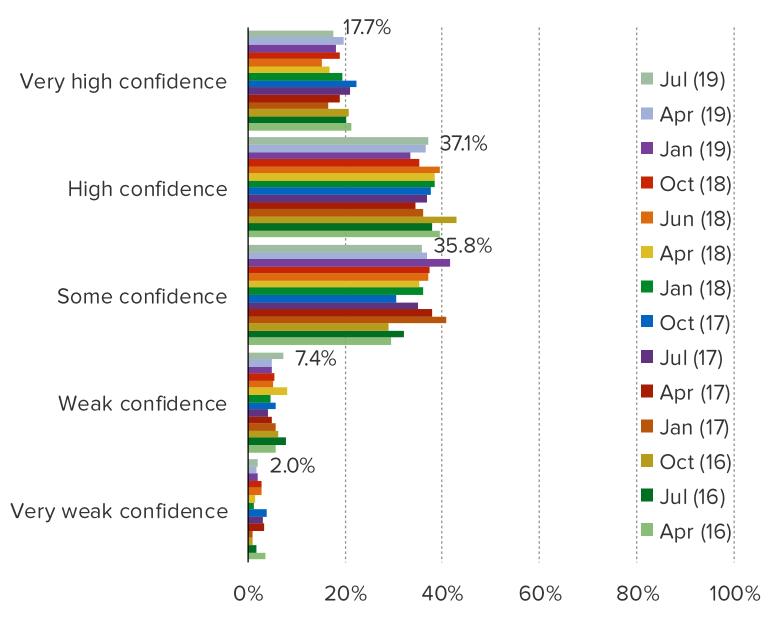


European E-Commerce

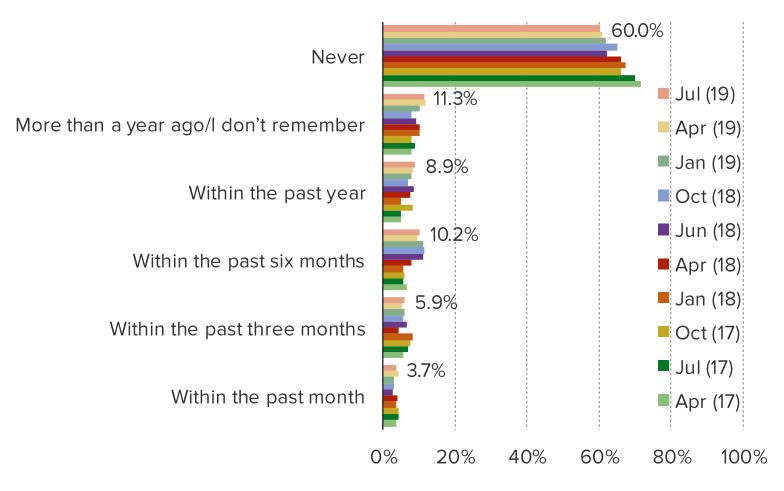
WHICH OF THE FOLLOWING WOULD DESCRIBE HOW OFTEN YOU TYPICALLY PURCHASE FROM AMAZON?



WHEN YOU SHOP AT AMAZON, HOW CONFIDENT ARE YOU THAT YOU WILL GET THE BEST POSSIBLE PRICE FOR WHAT YOU BUY?

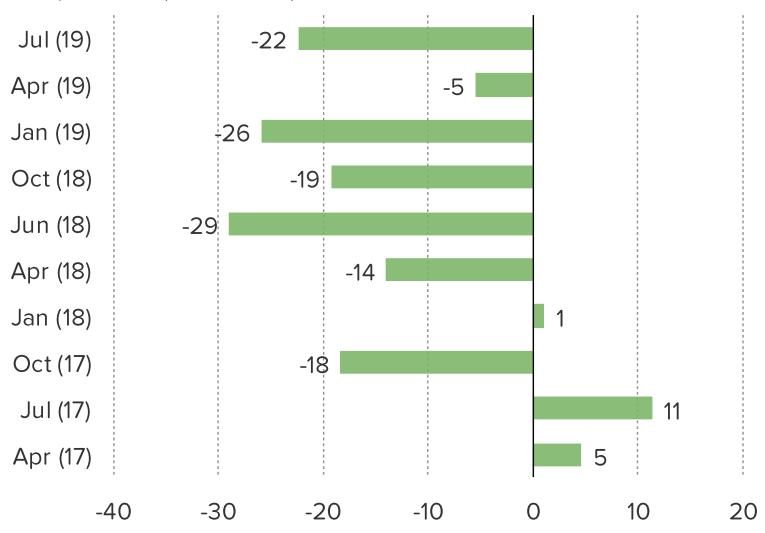


WHEN IS THE LAST TIME YOU PURCHASED SOMETHING FROM BOOHOO?



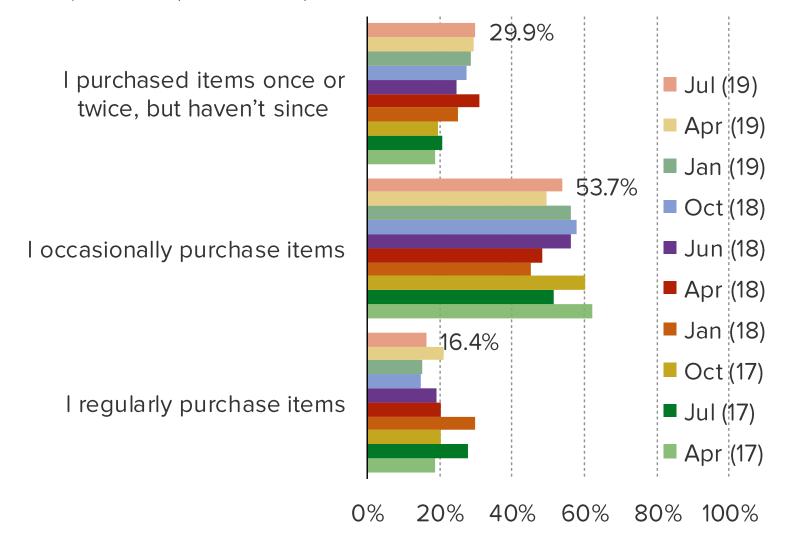
European E-Commerce

NET PROMOTER SCORE - BOOHOO



European E-Commerce

WHICH OF THE FOLLOWING WOULD DESCRIBE HOW OFTEN YOU TYPICALLY PURCHASE FROM BOOHOO?



WHEN YOU SHOP AT BOOHOO, HOW CONFIDENT ARE YOU THAT YOU WILL GET THE BEST POSSIBLE PRICE FOR WHAT YOU BUY?

