

BESPOKE SURVEYS

Children's Clothing Volume 5

Children's Clothing Retailer Mindshare

CONTENT

Tickers: CRI, PLCE, AMZN, GPS, WMT, TGT

1. Executive Summary
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SURVEY RESPONDENTS

We start with 1,500 US Consumers balanced to census and screened in 300 parents with children under 10 to answer questions about clothing retailers.

IN BRIEF – CHILDREN'S CLOTHING

KEY TAKEAWAYS**Toys R Us Traffic Shifting To WMT and AMZN**

- ❑ Awareness of Toys R Us store closing (among parents who shop there) increased significantly Q/Q. Feedback suggests Wal-Mart and Amazon are best positioned to benefit from the fall-out (they are relatively better off in the survey compared to Target).

Clothing – WMT Dominant, AMZN Growing

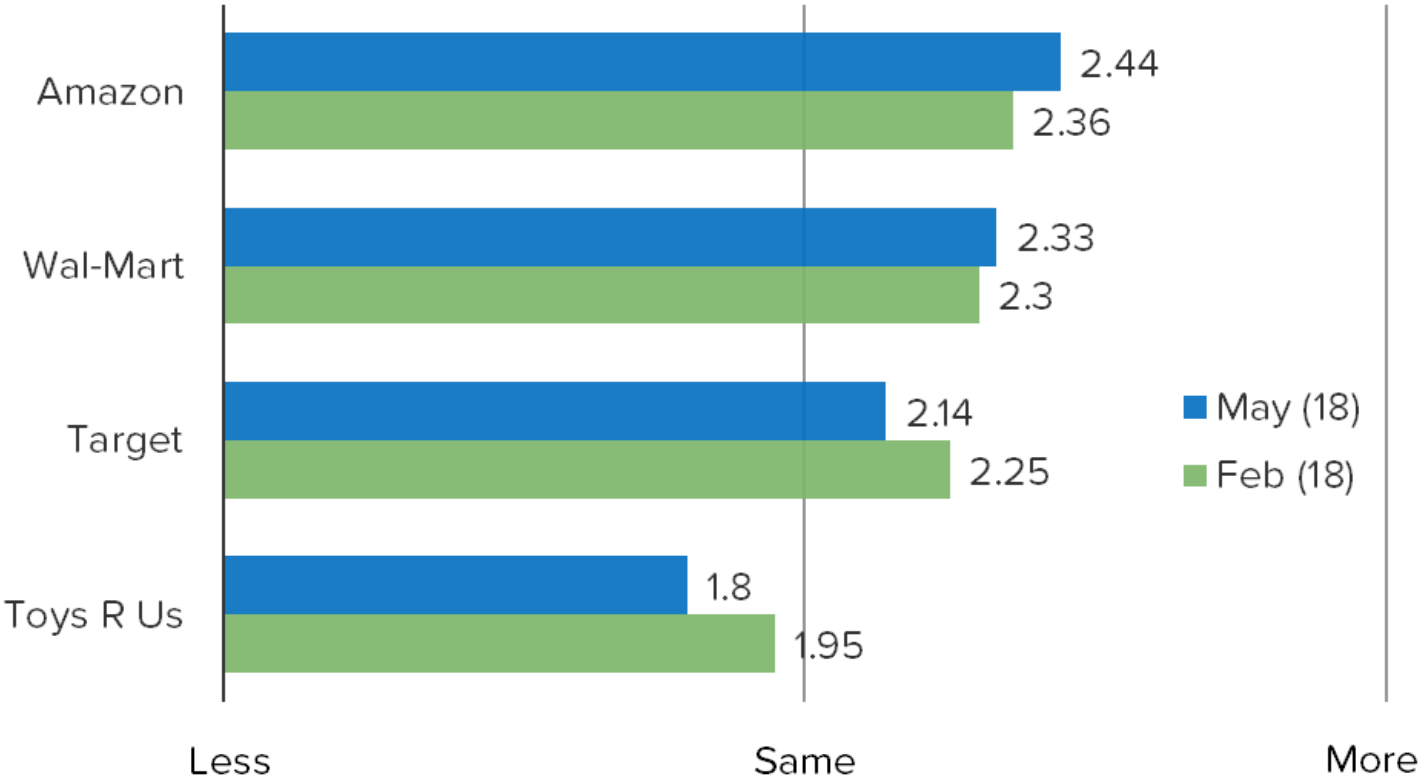
- ❑ Wal-Mart and Target continue to dominate mind share (where parents would buy children's clothing today), but Amazon is in third place and is growing.
- ❑ Parents are slowly shifting preferences in the direction of shopping for children's clothing online.

CHILDREN’S TOYS

Children’s Clothing Retailer Mindshare

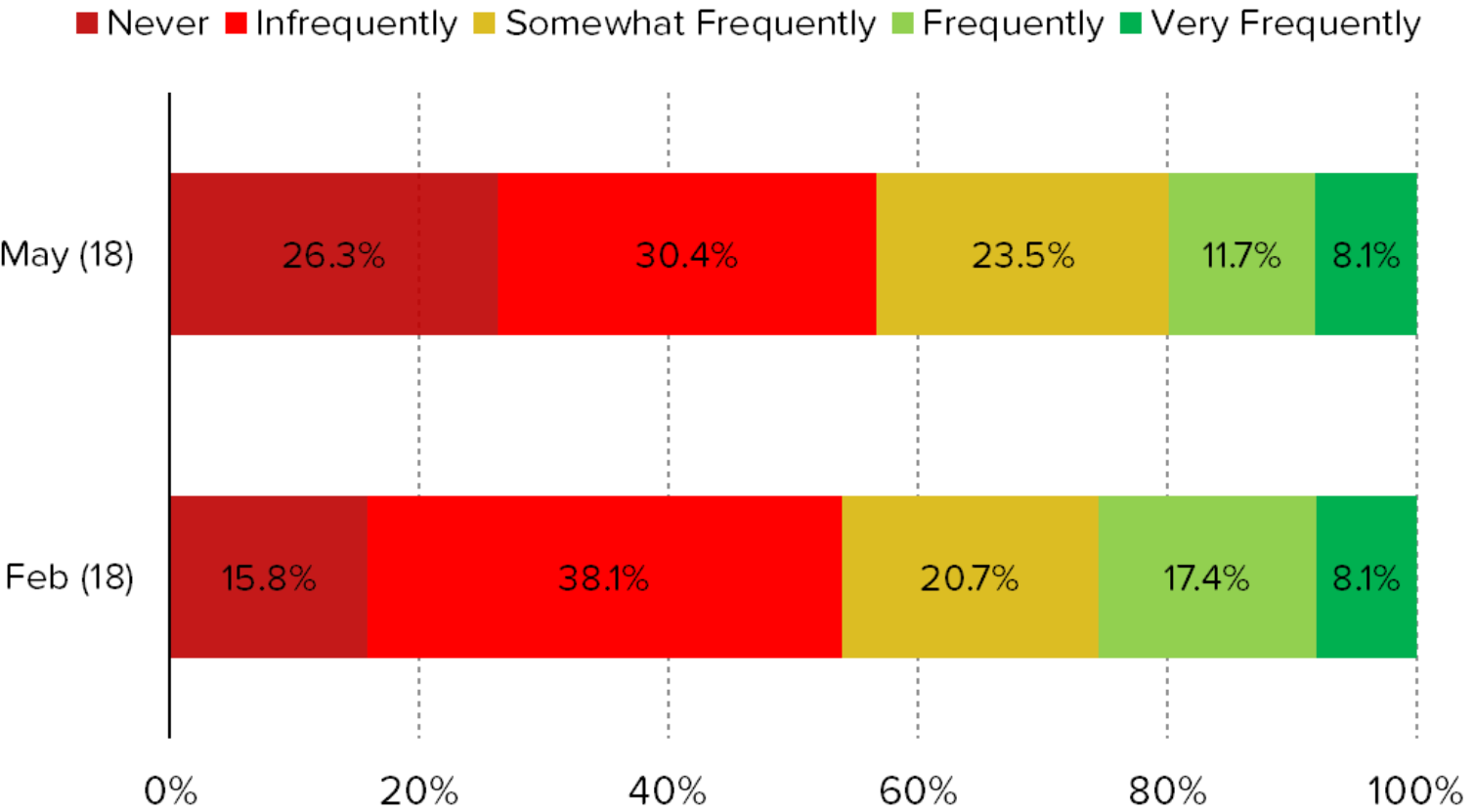
COMPARED TO A YEAR AGO, HAVE YOU BEEN RELYING ON ANY OF THE FOLLOWING MORE OR LESS FOR TOY PURCHASES?

Posed to parents with children under 10 years-old.



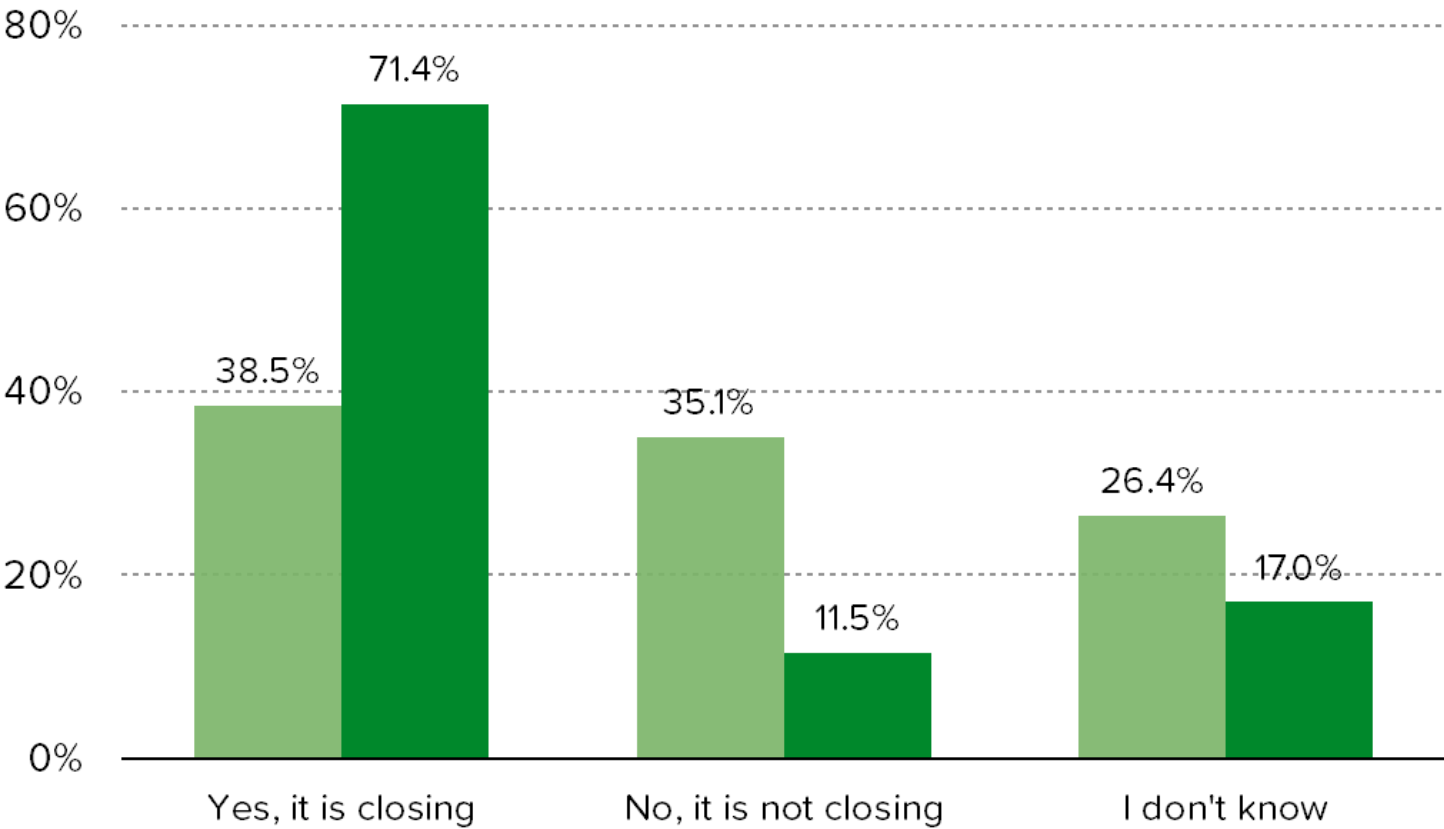
HOW OFTEN DO YOU SHOP AT TOYS R US LOCATIONS?

Posed to parents with children under 10 years-old.



IS THE TOYS R US THAT YOU TYPICALLY GO TO SCHEDULED TO CLOSE?

Posed to parents with children under 10 years-old who shop at Toys R Us at least infrequently.

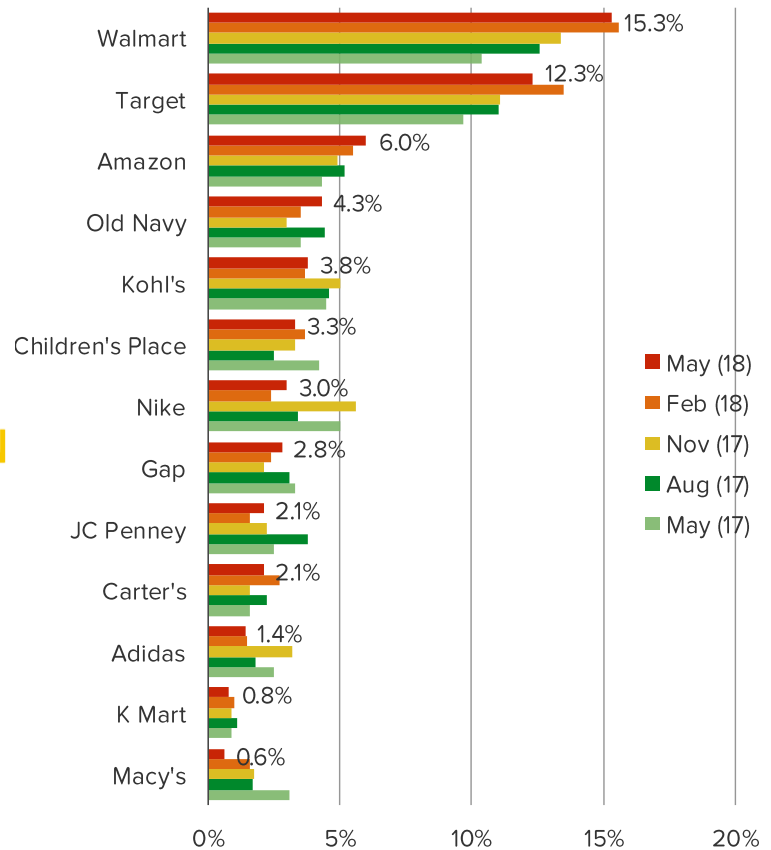




CHILDREN'S CLOTHING

WHEN YOU THINK ABOUT BUYING YOUR CHILDREN (UNDER 10) CLOTHING OR APPAREL, WHERE WOULD YOU THINK OF FIRST TO GET IT?

Posed to parents with children under 10 years-old.



Retailer	May (17)	Aug (17)	Nov (17)	Feb (18)	May (18)	Q/Q	Y/Y
Walmart	10.4%	12.6%	13.4%	15.6%	15.3%	-0.3%	4.9%
Target	9.7%	11.0%	11.1%	13.5%	12.3%	-1.2%	2.6%
Amazon	4.3%	5.2%	4.9%	5.5%	6.0%	0.5%	1.7%
Old Navy	3.5%	4.4%	3.0%	3.5%	4.3%	0.8%	0.8%
Kohl's	4.5%	4.6%	5.0%	3.7%	3.8%	0.1%	-0.7%
Children's Place	4.2%	2.5%	3.3%	3.7%	3.3%	-0.4%	-0.9%
Nike	5.0%	3.4%	5.6%	2.4%	3.0%	0.6%	-2.0%
Gap	3.3%	3.1%	2.1%	2.4%	2.8%	0.4%	-0.5%
Carter's	1.6%	2.2%	1.6%	2.7%	2.1%	-0.6%	0.5%
JC Penney	2.5%	3.8%	2.2%	1.6%	2.1%	0.5%	-0.4%
Adidas	2.5%	1.8%	3.2%	1.5%	1.4%	-0.1%	-1.1%
K Mart	0.9%	1.1%	0.9%	1.0%	0.8%	-0.2%	-0.1%
Macy's	3.1%	1.7%	1.7%	1.6%	0.6%	-1.0%	-2.5%

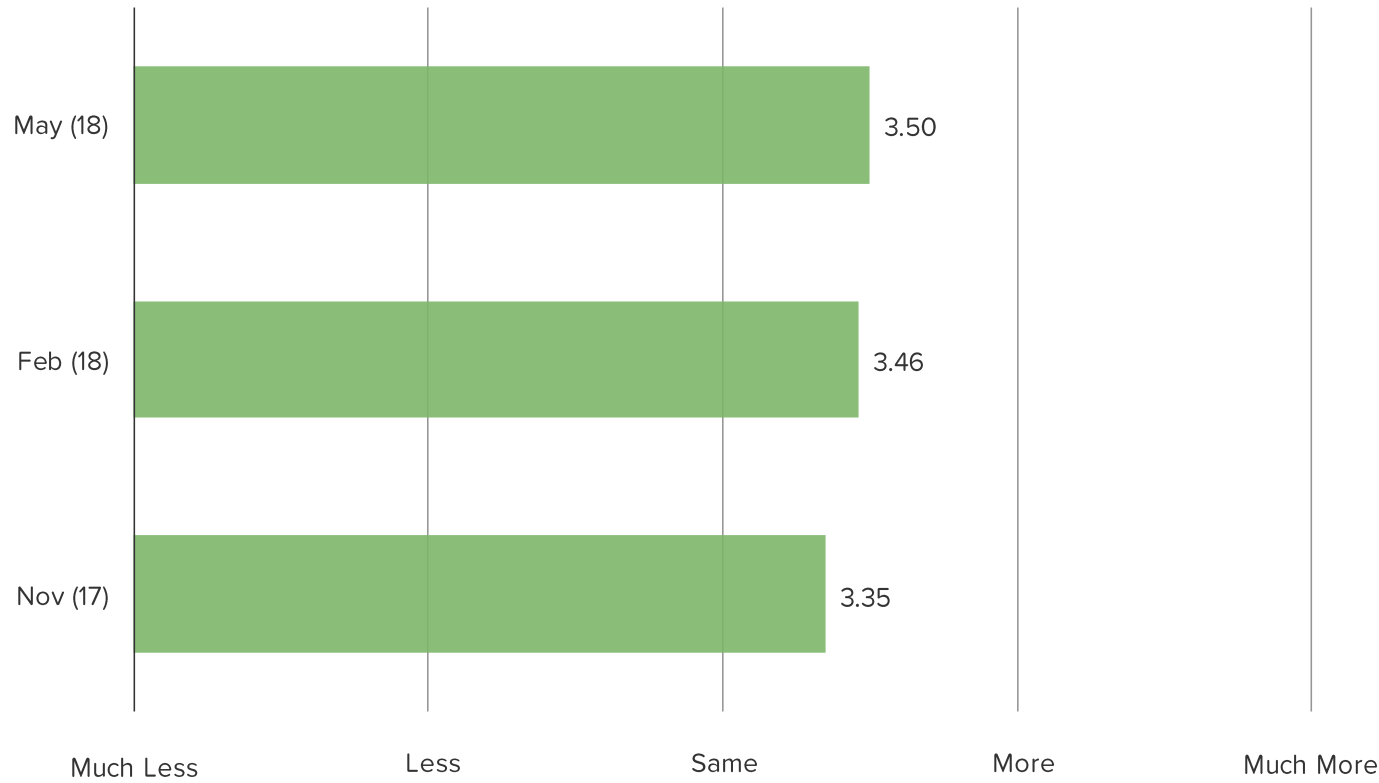
DO YOU PREFER TO BUY CHILDREN’S CLOTHING IN-STORES OR ONLINE?

Posed to parents with children under 10 years-old.



COMPARED TO ONE YEAR AGO, ARE YOU BUYING CHILDREN’S CLOTHING ONLINE MORE OR LESS?

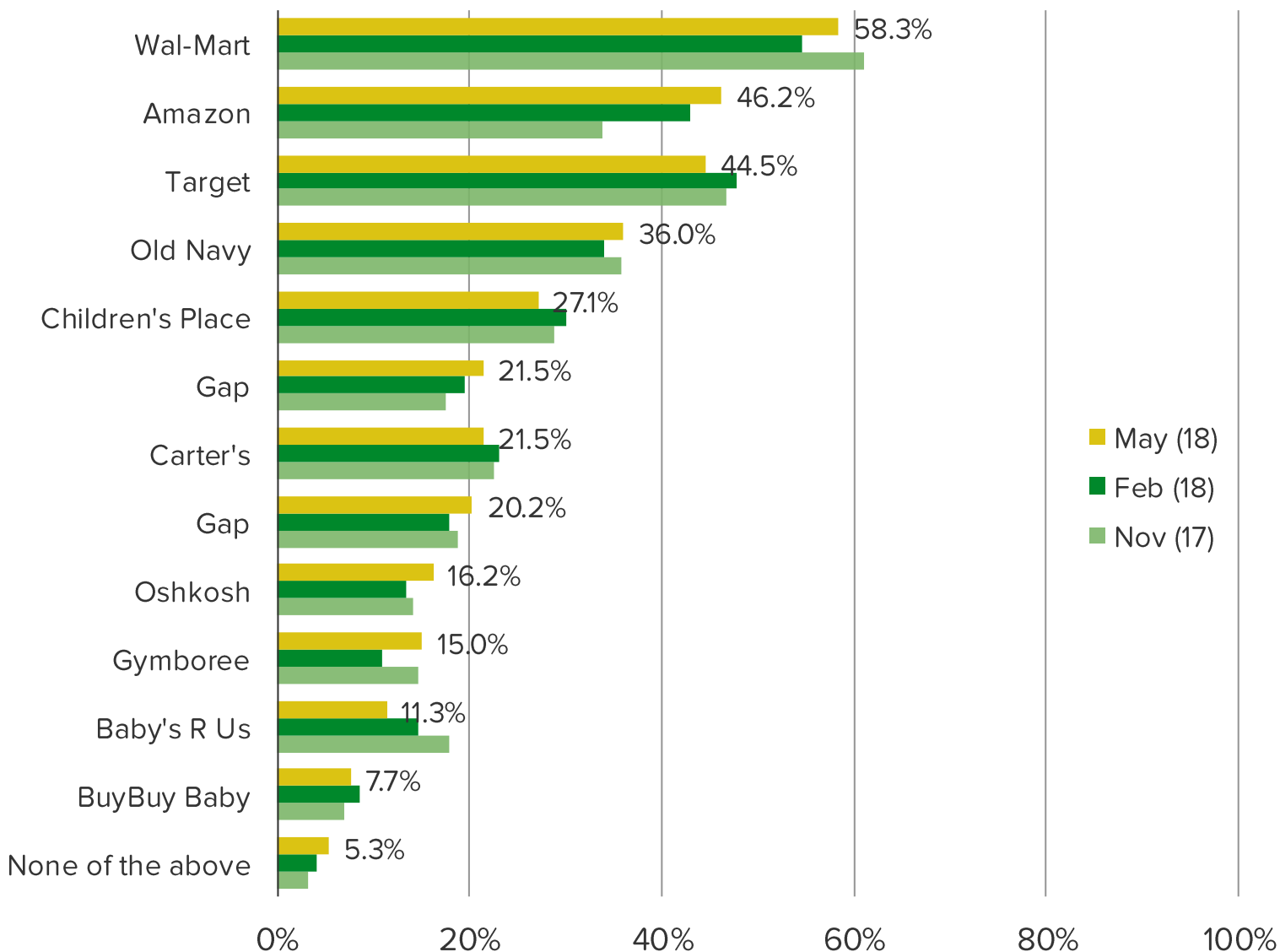
Posed to parents with children under 10 years-old.



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BOUGHT CHILDREN'S CLOTHING FROM IN THE PAST YEAR

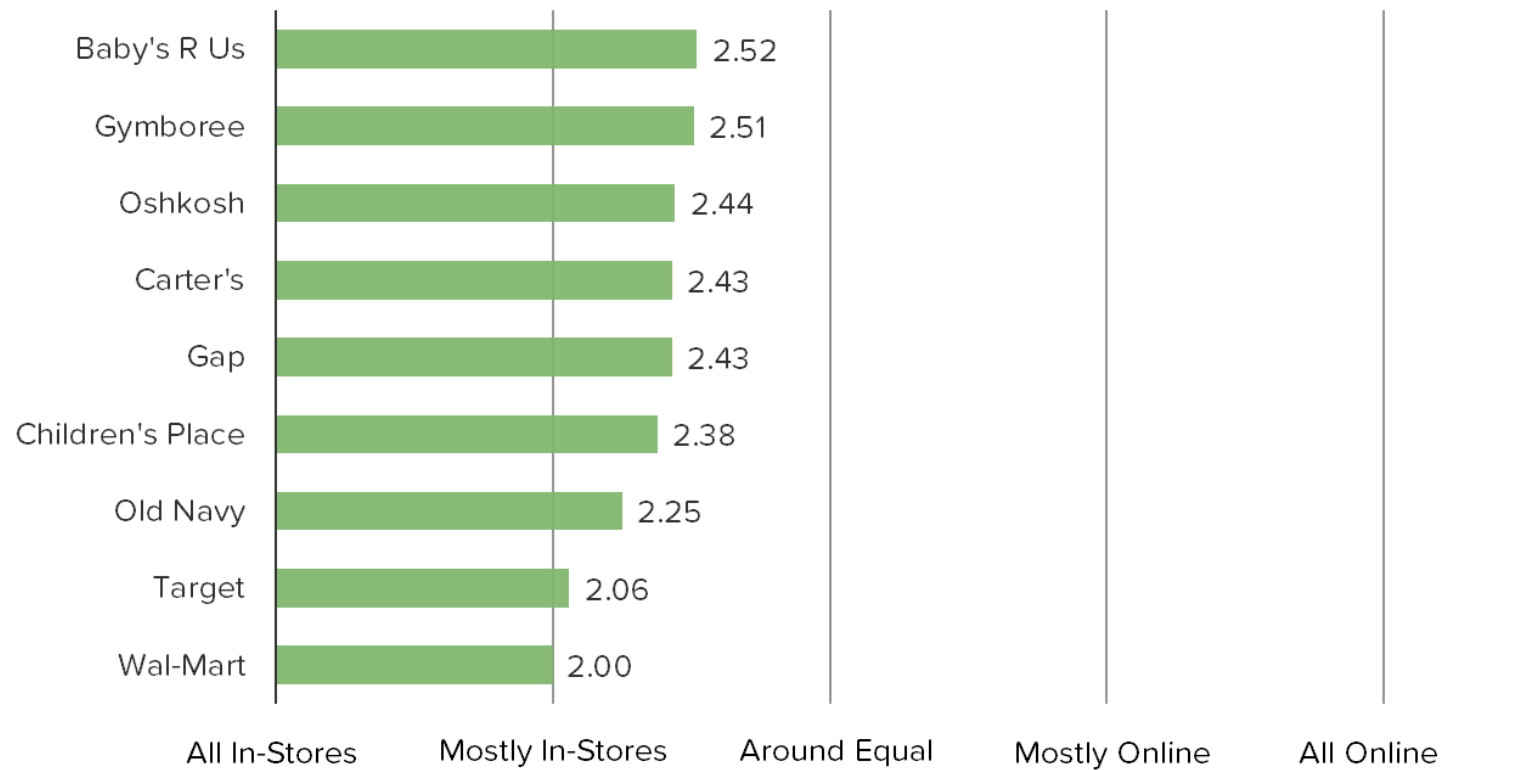
Posed to parents with children under 10 years-old.



Children’s Clothing Retailer Mindshare

DO YOU SHOP FROM HERE IN STORES OR ONLINE?

Posed to parents with children under 10 years-old who shopped each retailer in the past year.



Children’s Clothing Retailer Mindshare

OVER THE COURSE OF THE PAST YEAR, HAS YOUR SHOPPING FREQUENCY HERE CHANGED (IN-STORES OR ONLINE)?

Posed to parents with children under 10 years-old who shopped each retailer in the past year.

