

BESPOKE SURVEYS

Department Stores and Clothing Retail Vol 28

1,250+ US Consumers, Balanced to Census

Macy's, Kohl's, Burlington, TJ Maxx, Ross, Shein, Farfetch, etc.



CHECK BREAKDOWN:

TREND CHECKS

CLOTHING PURCHASES

This quarter, feedback worsened slightly when it comes to recent clothing purchases (with the share who are purchasing clothes less often than normal growing).

CONSUMER OPINIONS OF DEPARTMENT STORES

Consumer opinions are more positive when it comes to off price and department stores relative to luxury department stores and branded apparel stores.

TREASURE HUNT EXPERIENCE

Consumers like to strongly like the treasure hunt shopping experience overall, with a slight positive uptick this quarter.

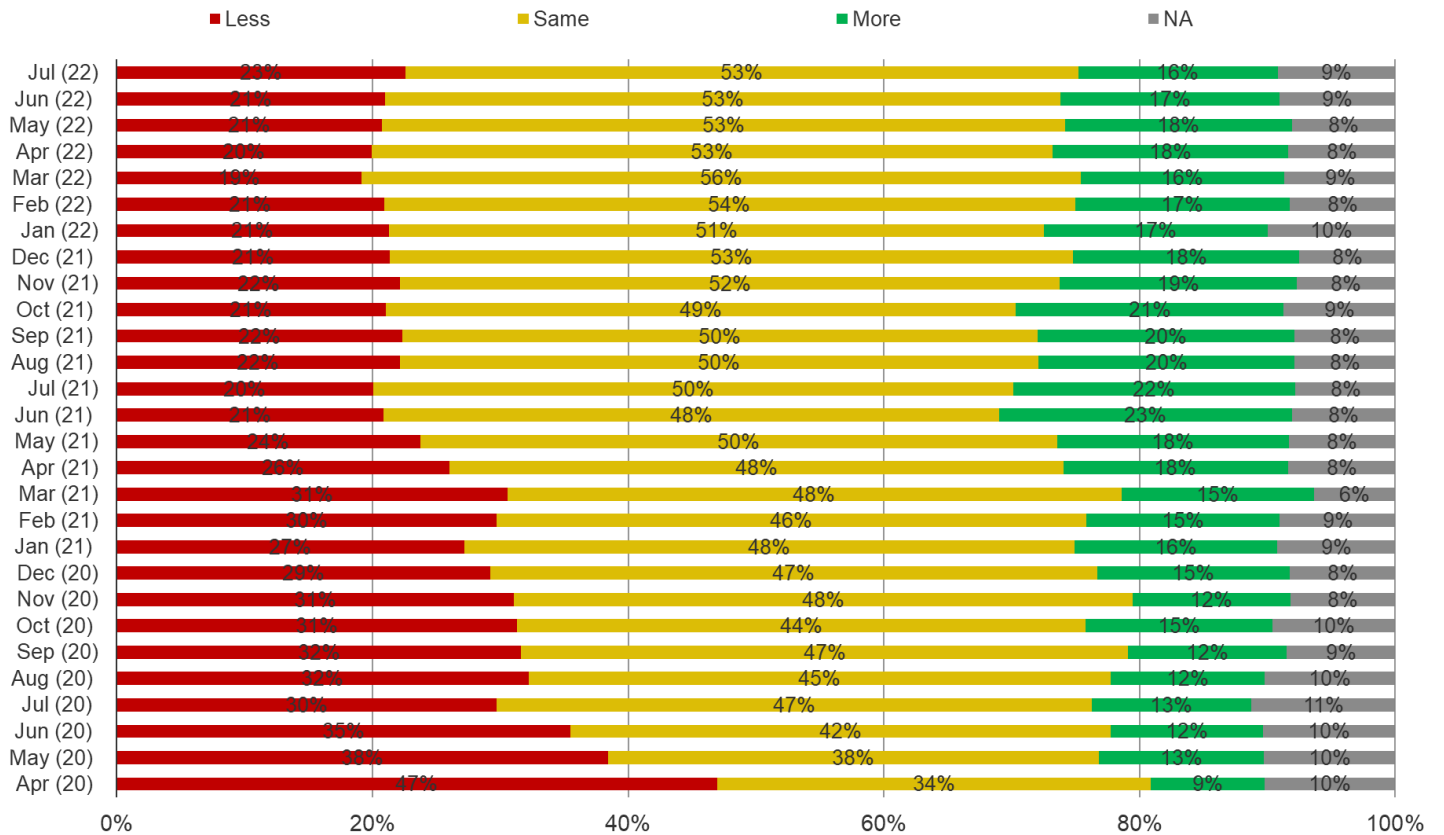
SHEIN, FARFETCH, ETC.

Shein is viewed as a significant popularity gainer. The percentage who called out Shein as a popularity gainer increased considerably y/y. Feedback toward Shein and Farfetch improved sequentially.

SELF-ASSESSED CLOTHING SHOPPING

HAVE YOU BEEN BUYING CLOTHING MORE OR LESS OFTEN THAN NORMAL DURING THE PAST MONTH?

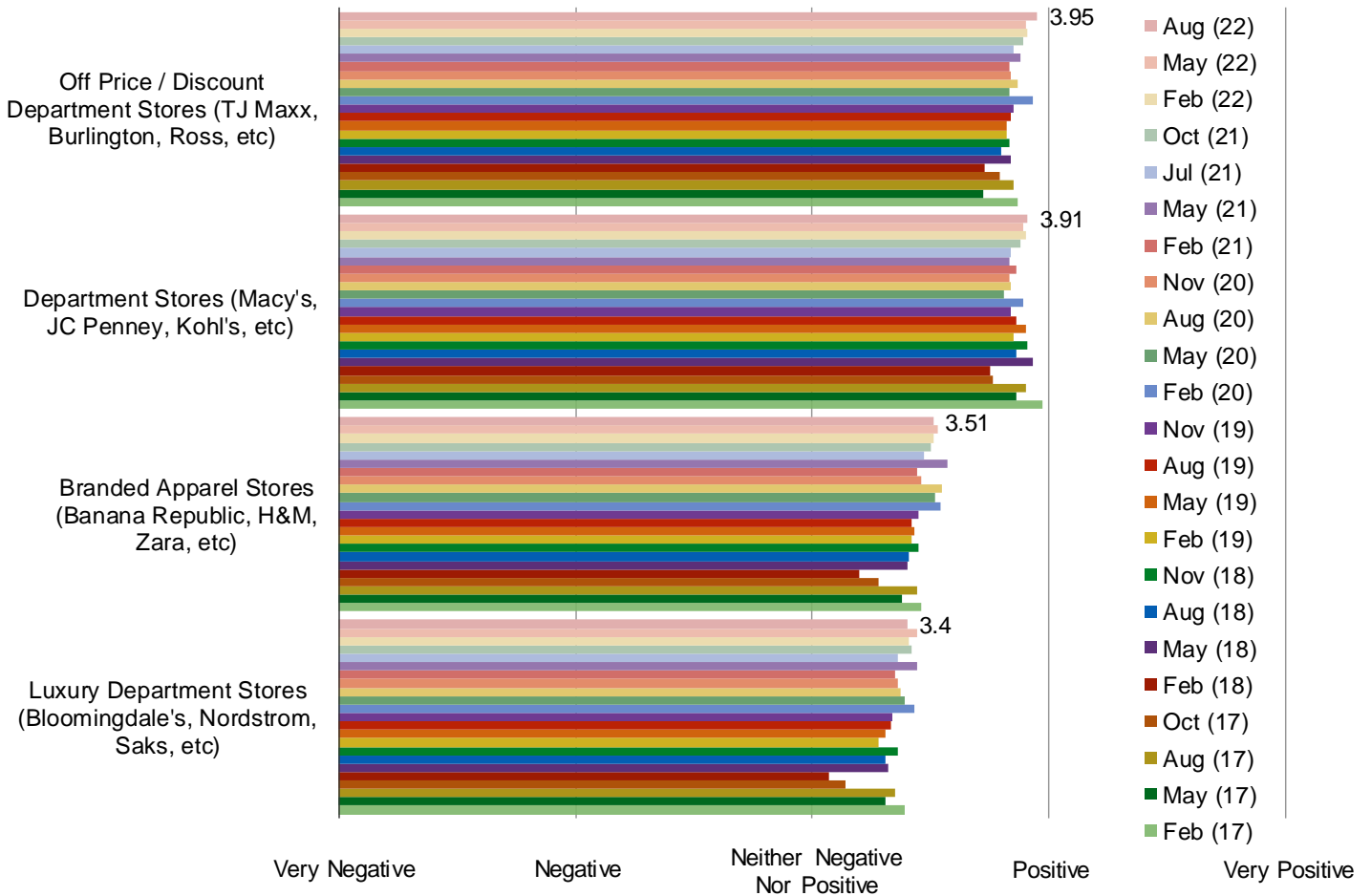
This question was posed to all respondents.



DEPARTMENT STORE CHANNEL SENTIMENT

ALL CONSUMERS: OPINION OF EACH TYPE OF RETAILER

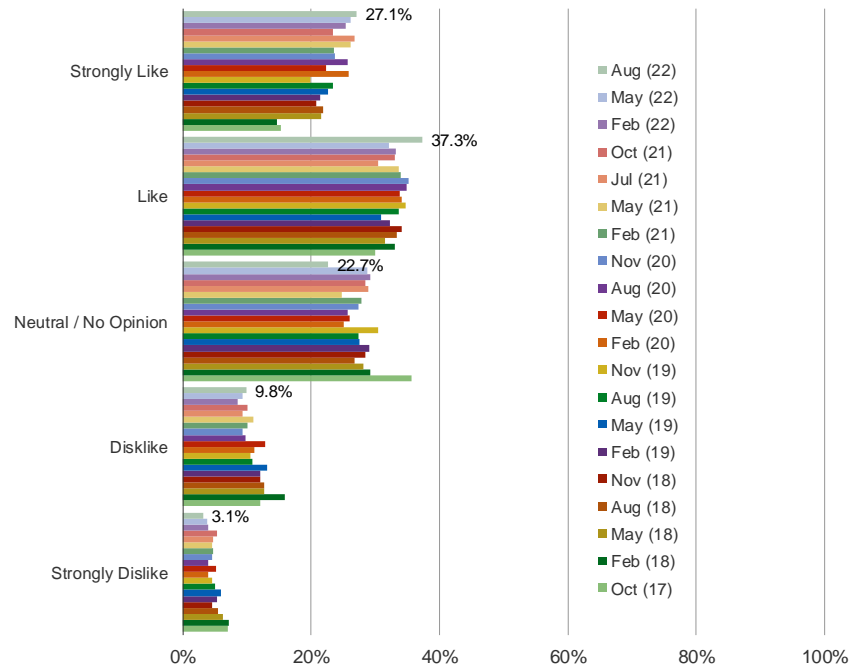
Posed to all consumers.



TREASURE HUNT SHOPPING EXPERIENCE

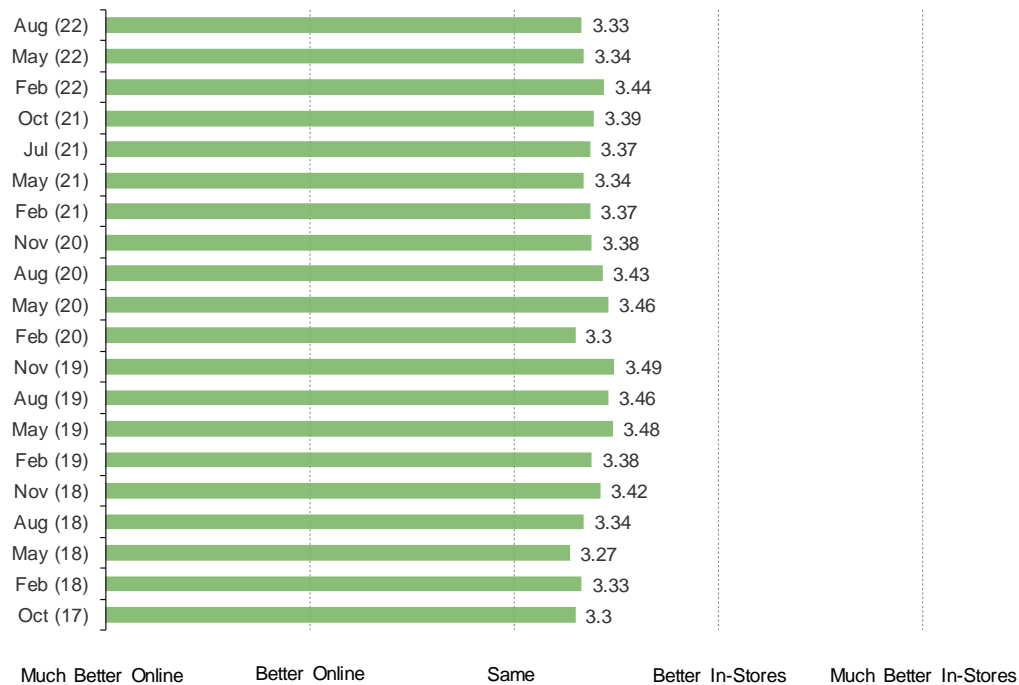
DO YOU LIKE THE TREASURE HUNT TYPE OF SHOPPING EXPERIENCE WHERE BRANDS/PRODUCTS AVAILABLE AT A DISCOUNTED PRICE CHANGE OFTEN?

Posed to all consumers.



IS THE TREASURE HUNT TYPE OF SHOPPING EXPERIENCE BETTER ONLINE OR IN-STORES?

Posed to all consumers who said they like or strongly like the treasure hunt shopping experience.



DEPARTMENT STORE DEEP DIVES (COMPARISONS)

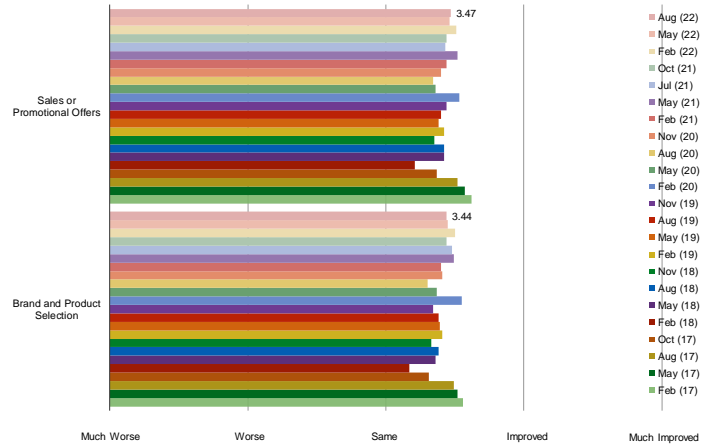
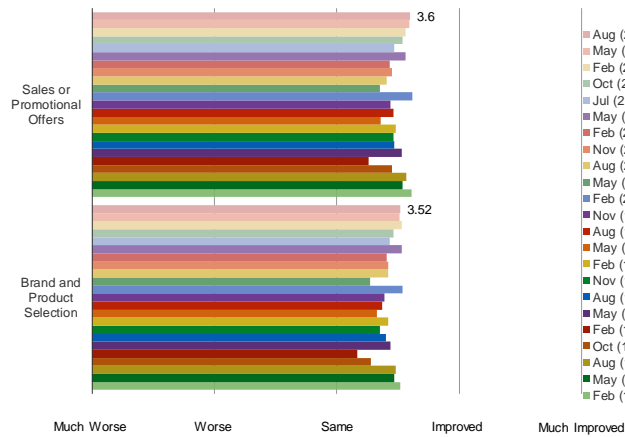
PRODUCT SELECTIONS

HAVE YOU NOTICED ANY CHANGES IN THE FOLLOWING WHILE SHOPPING AT _____?

Posed to customers of each department store (bought in past year).

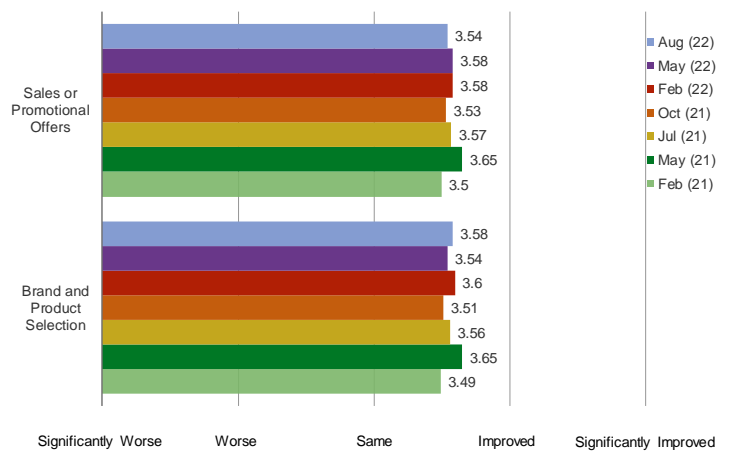
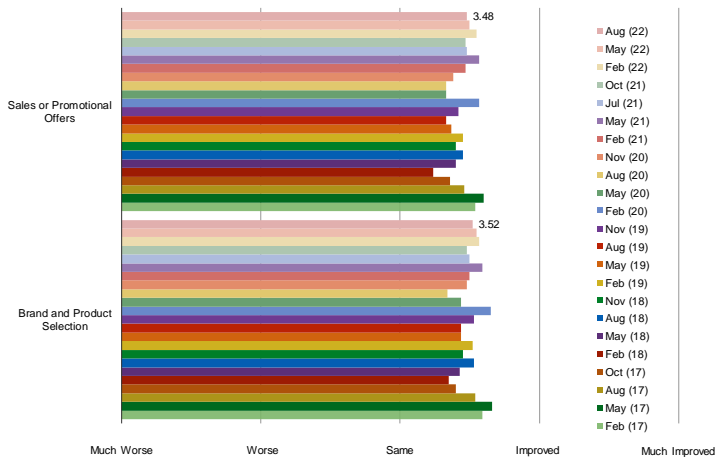
Macy's

Kohl's

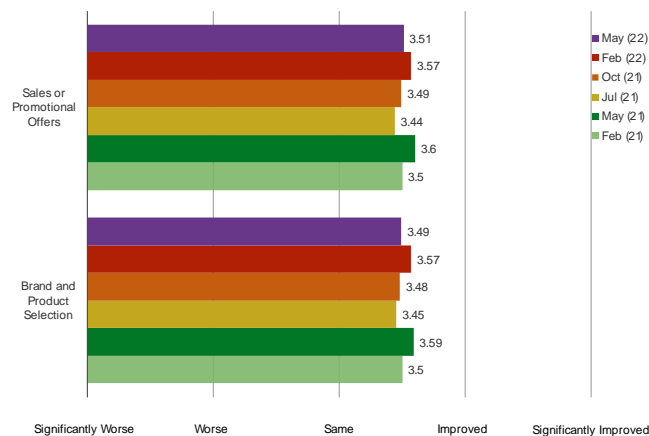


TJ Maxx

Burlington



Ross

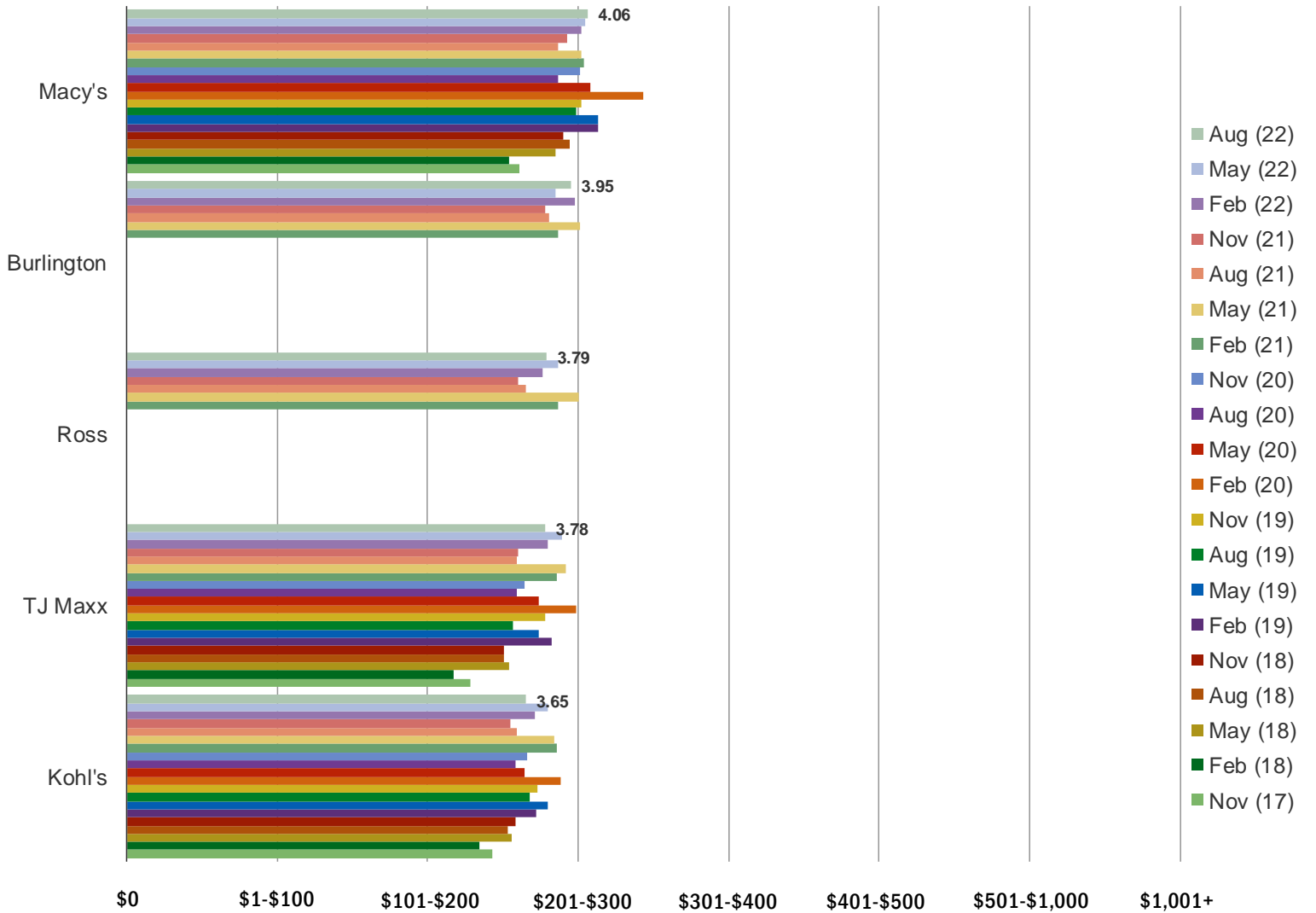


ENGAGEMENT DEEP DIVES

AMONG ACTIVE CUSTOMERS (PURCHASED IN THE PAST YEAR)

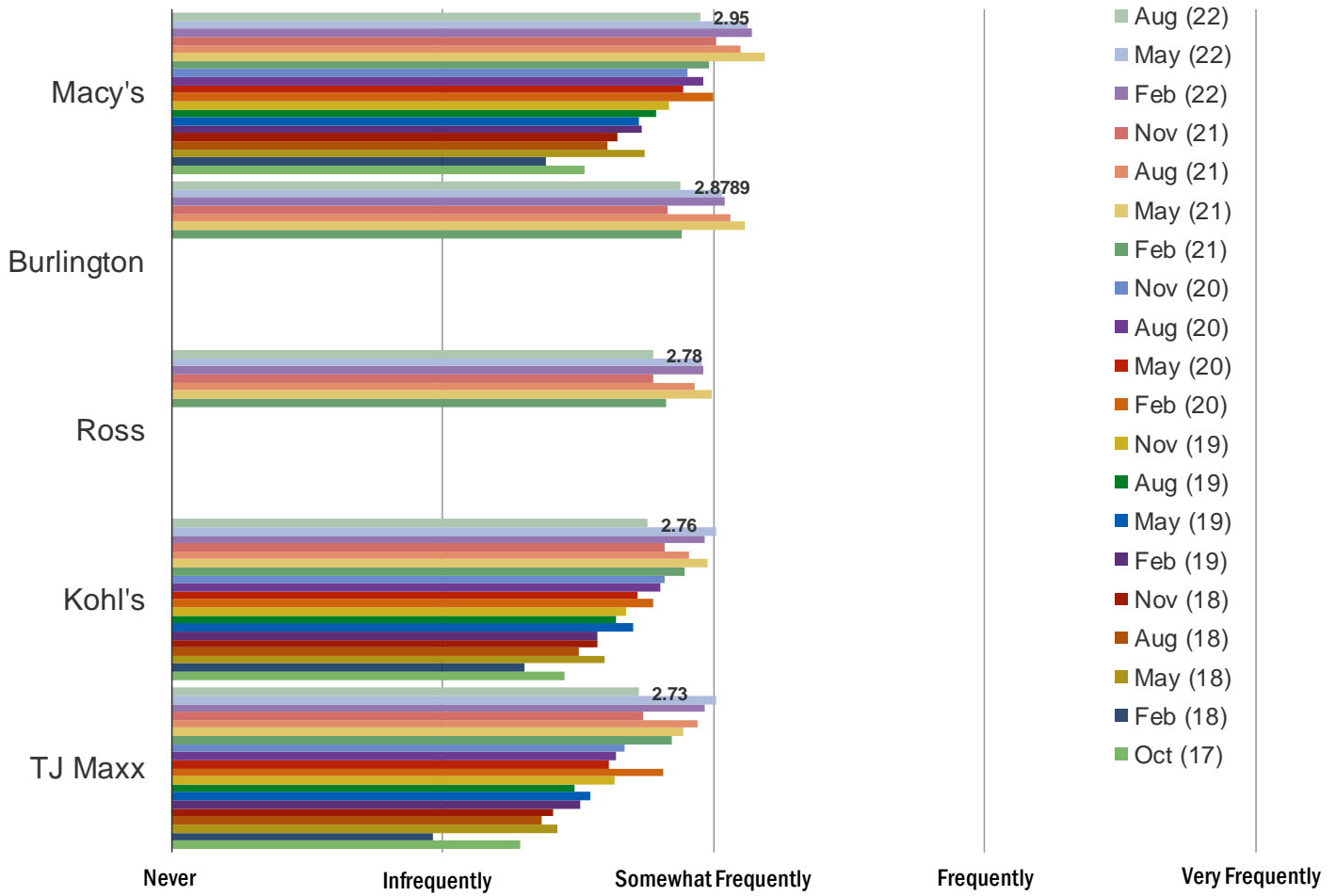
HOW MUCH HAVE YOU SPENT THROUGH _____ IN THE PAST SIX MONTHS?

Posed to customers of each department store (bought in past year).



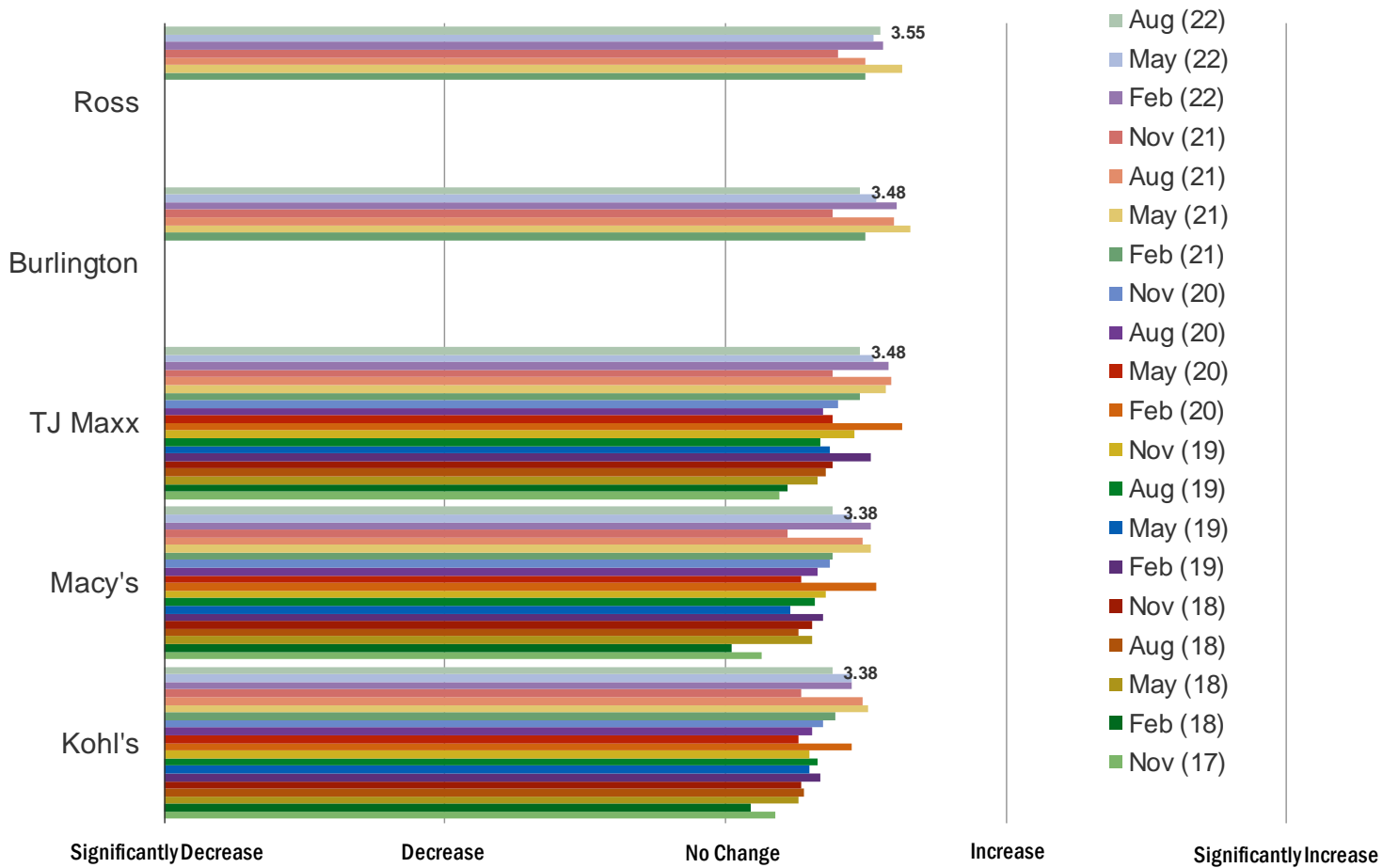
HOW OFTEN DO YOU SHOP _____ ONLINE?

Posed to customers of each department store (bought in past year).



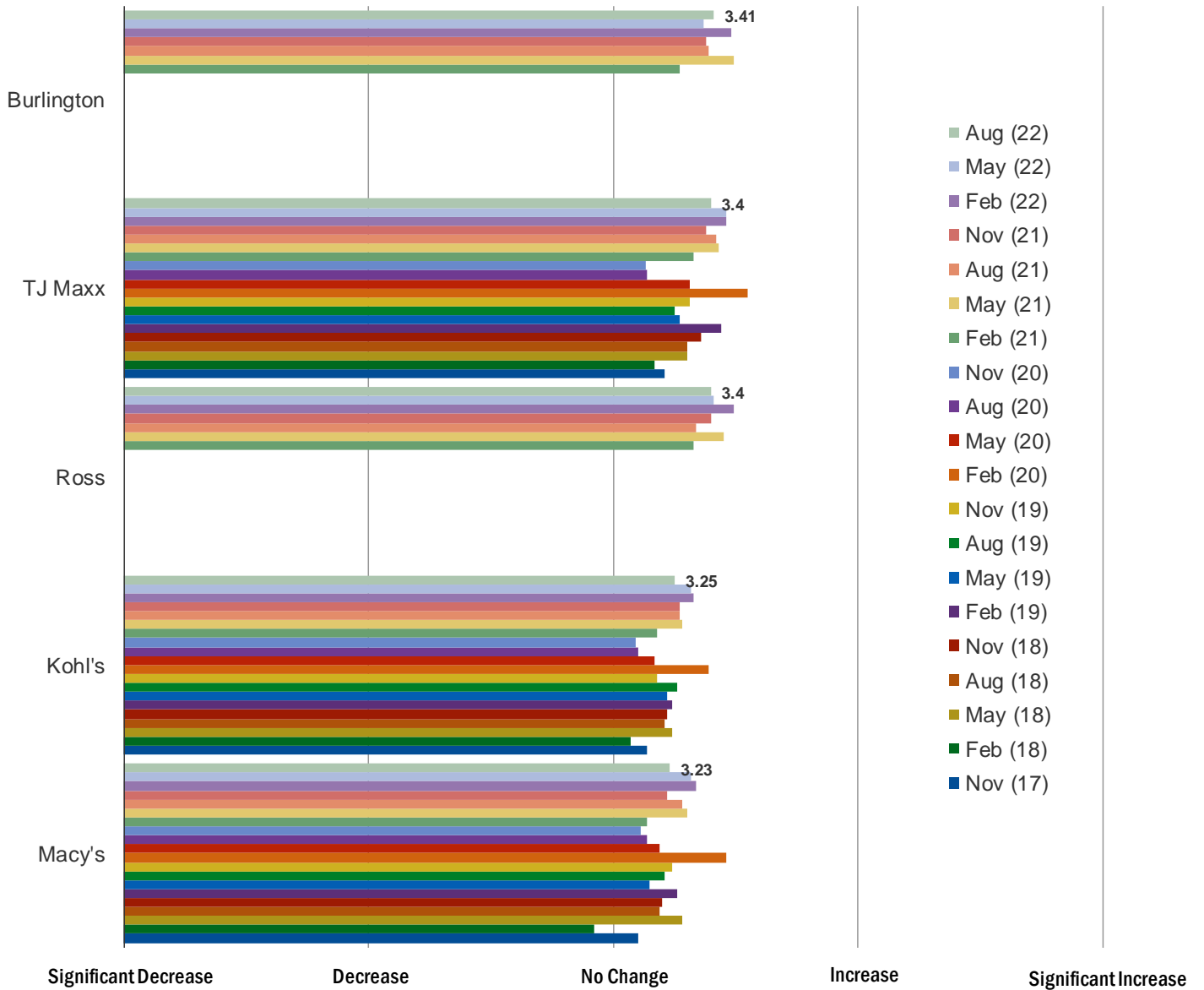
GOING FORWARD, DO YOU EXPECT TO CHANGE HOW MUCH YOU SHOP _____?

Posed to customers of each department store (bought in past year).



HAS YOUR SHOPPING OF _____ CHANGED COMPARED TO A YEAR AGO?

Posed to customers of each department store (bought in past year).

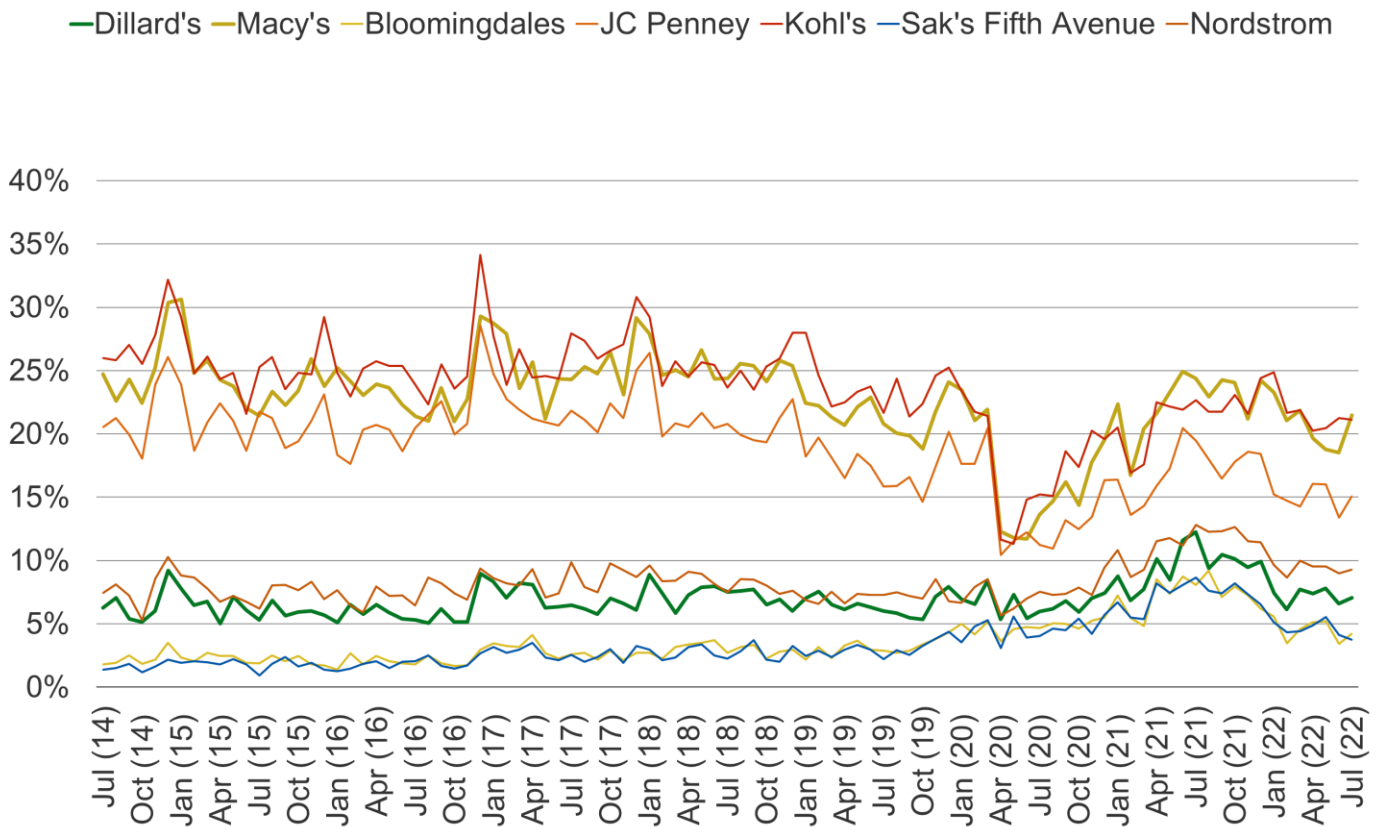


MONTHLY TRAFFIC TRACKERS

AMONG ALL RESPONDENTS, BALANCED TO US CENSUS

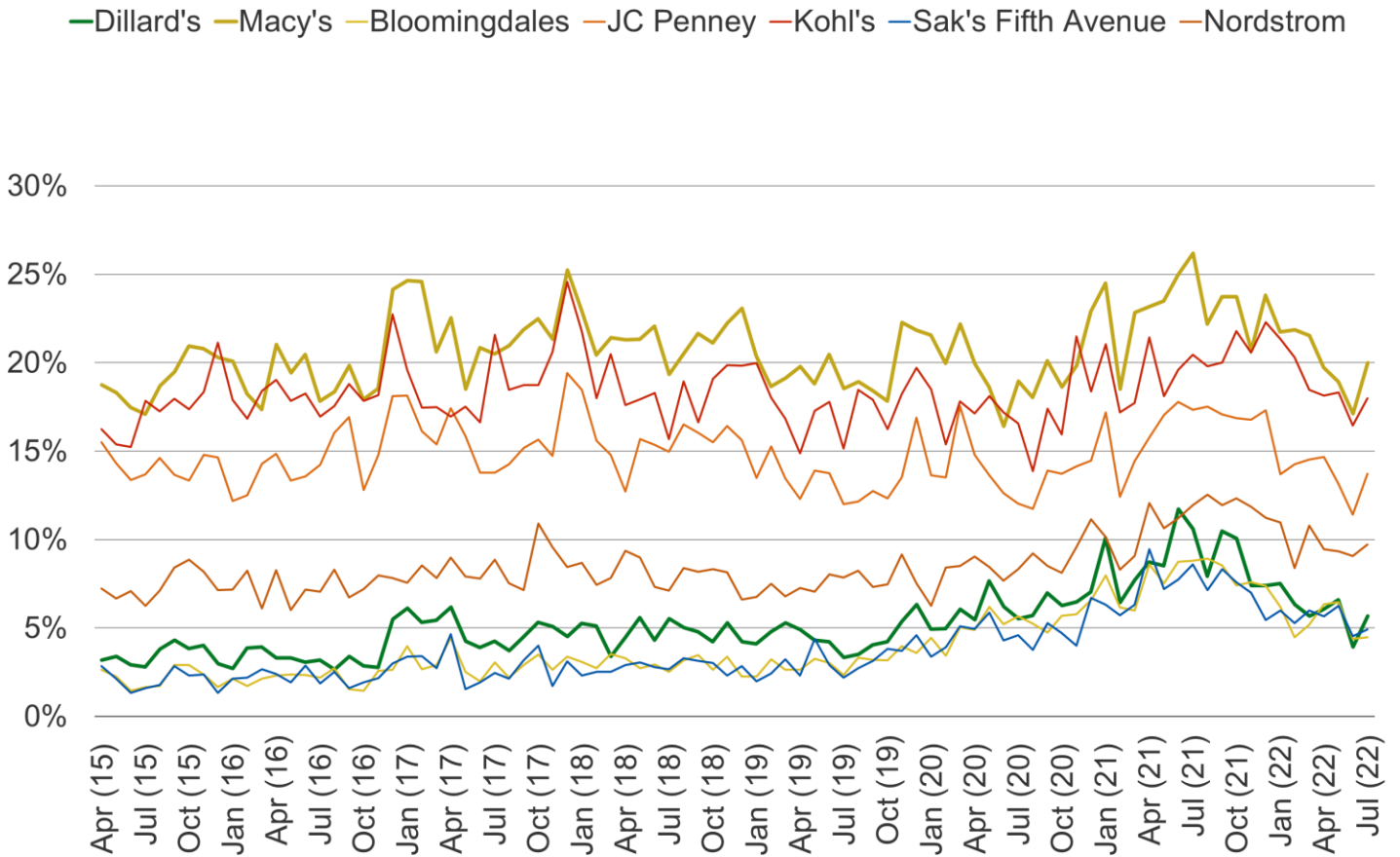
HAVE YOU VISITED ANY OF THE FOLLOWING STORE LOCATIONS IN THE PAST MONTH? (SELECT ALL THAT APPLY)

Posed to all respondents (1,500 US consumers balanced to census).



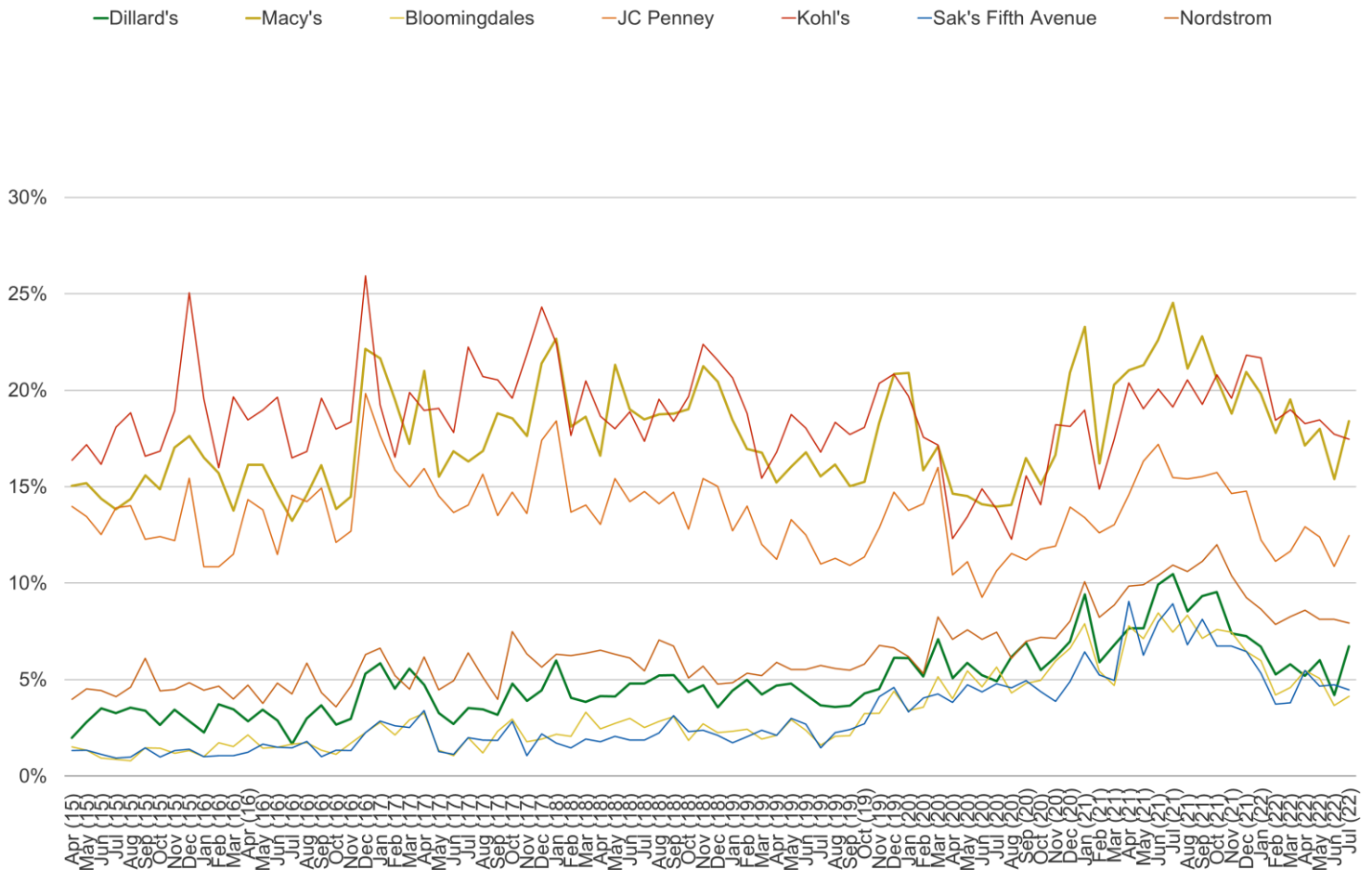
HAVE YOU VISITED ANY OF THE FOLLOWING COMPANY WEBSITES IN THE PAST MONTH? (SELECT ALL THAT APPLY)

Posed to all respondents (1,500 US consumers balanced to census).



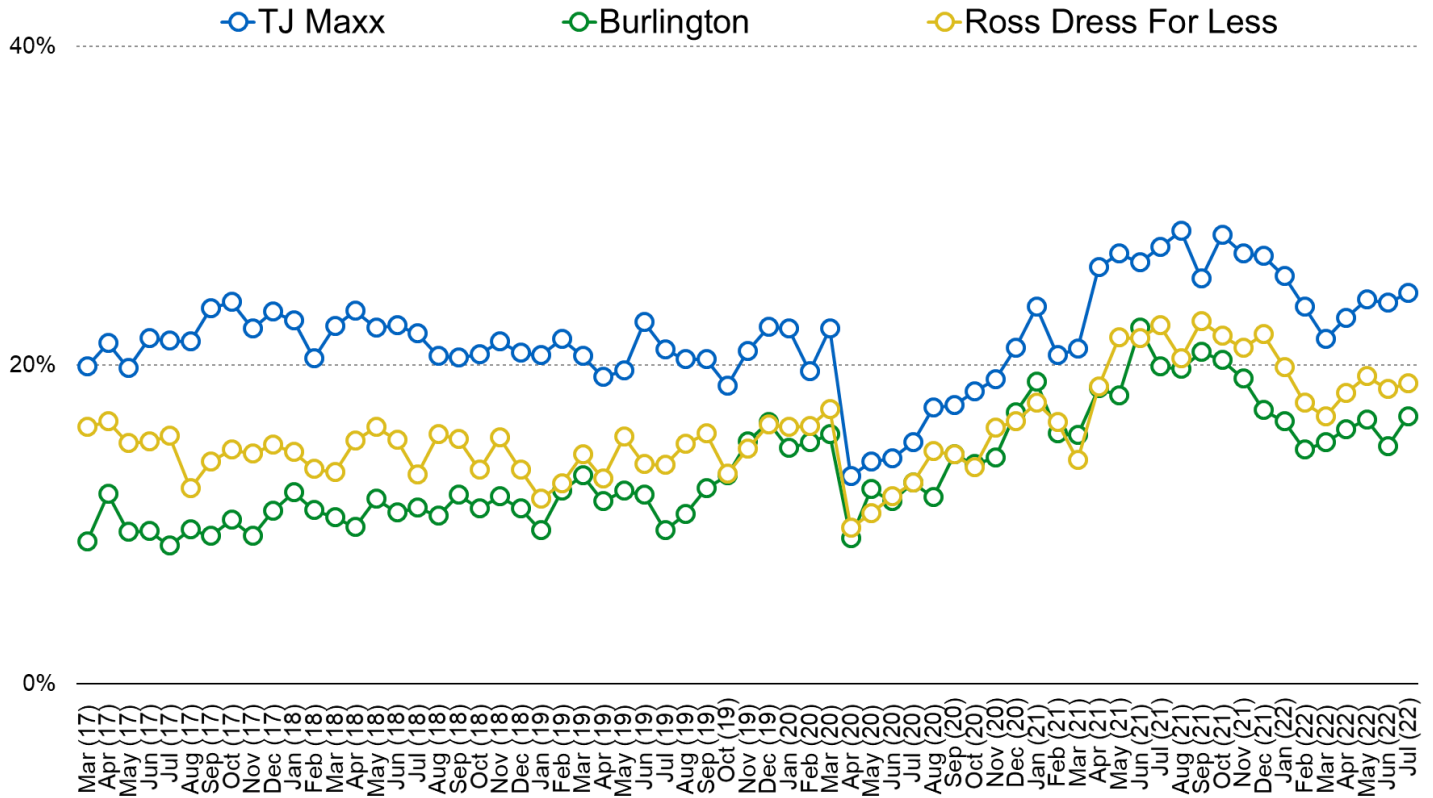
HAVE YOU PURCHASED FROM ANY OF THE FOLLOWING IN THE PAST MONTH (EITHER IN-STORES OR ONLINE)?

Posed to all respondents (1,500 US consumers balanced to census).



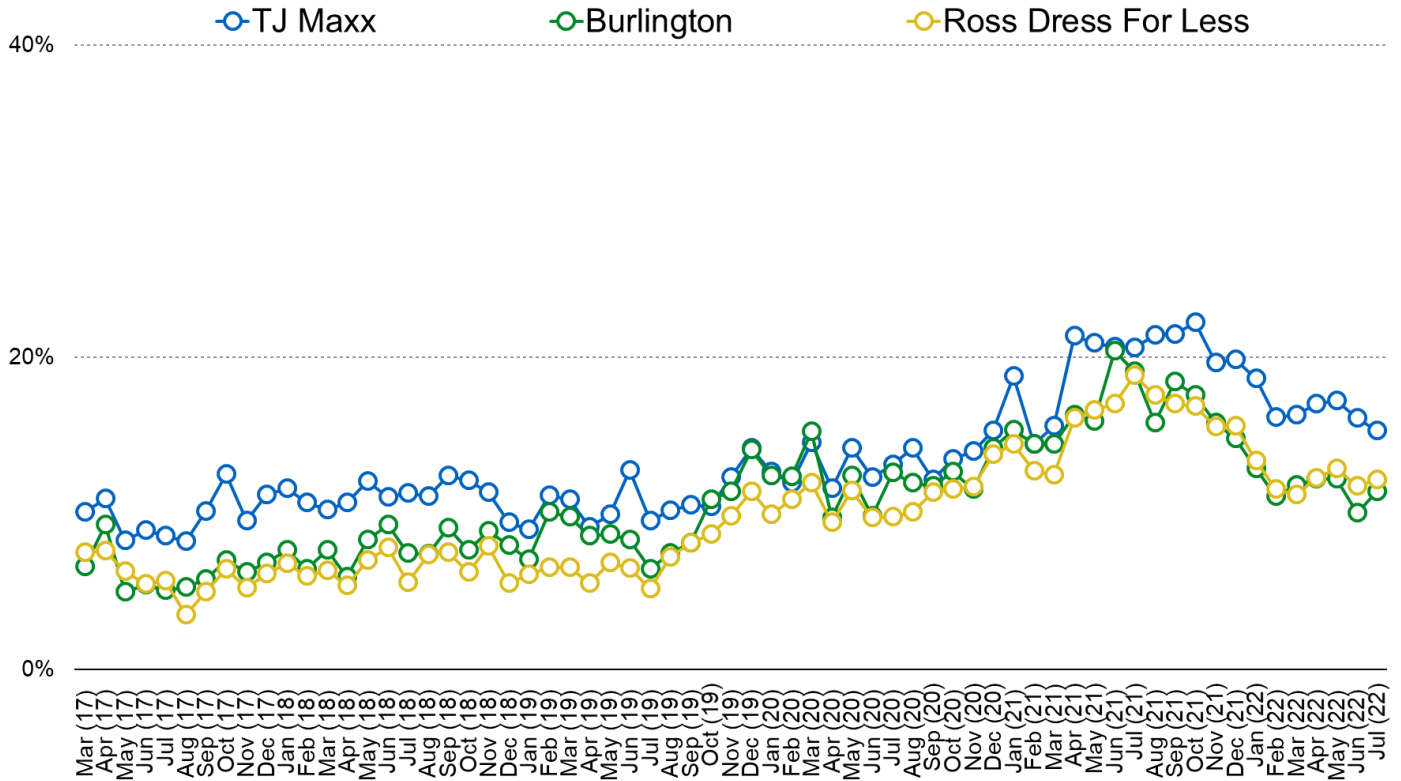
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Posed to all respondents (1,500 US consumers balanced to census).



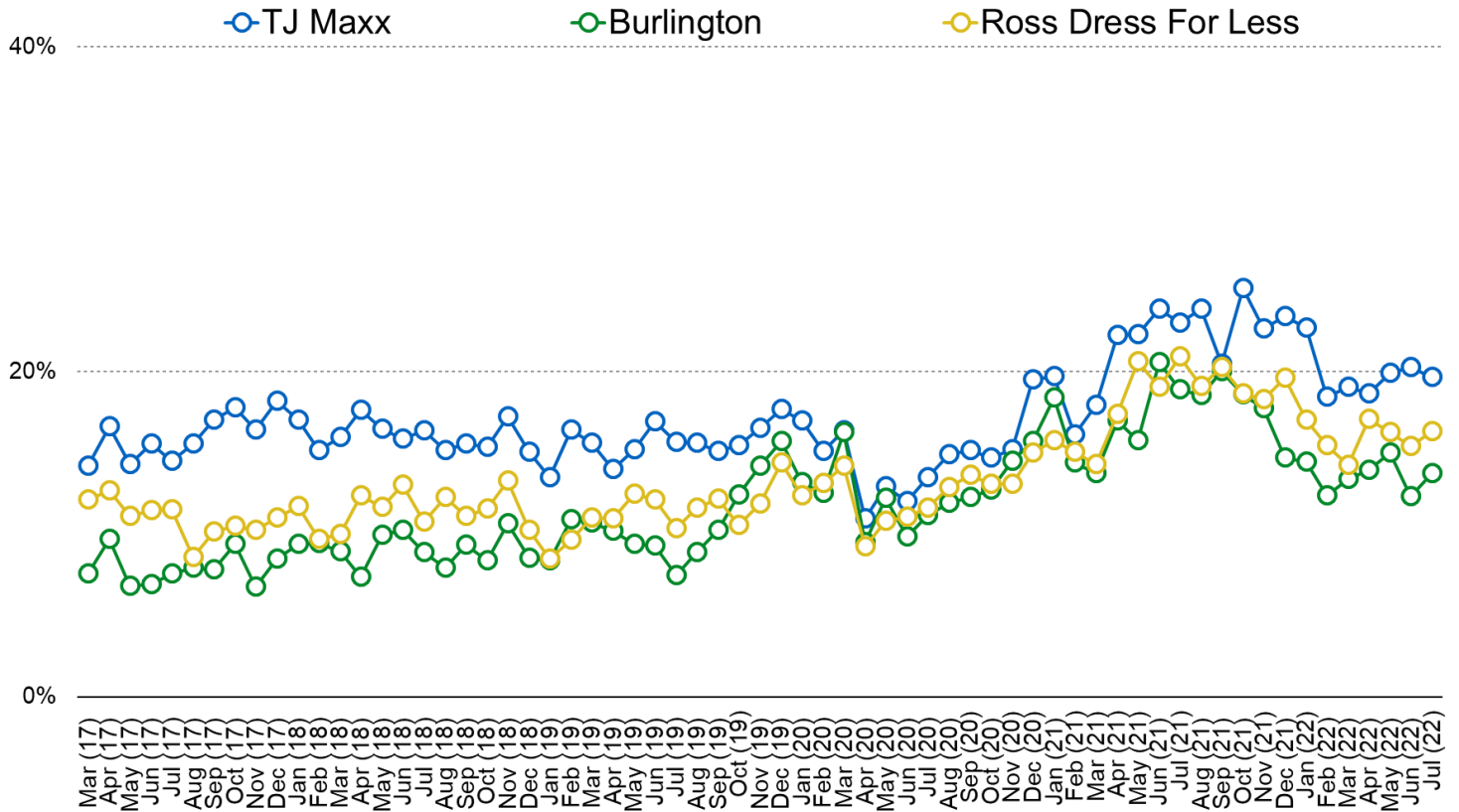
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Posed to all respondents (1,500 US consumers balanced to census).



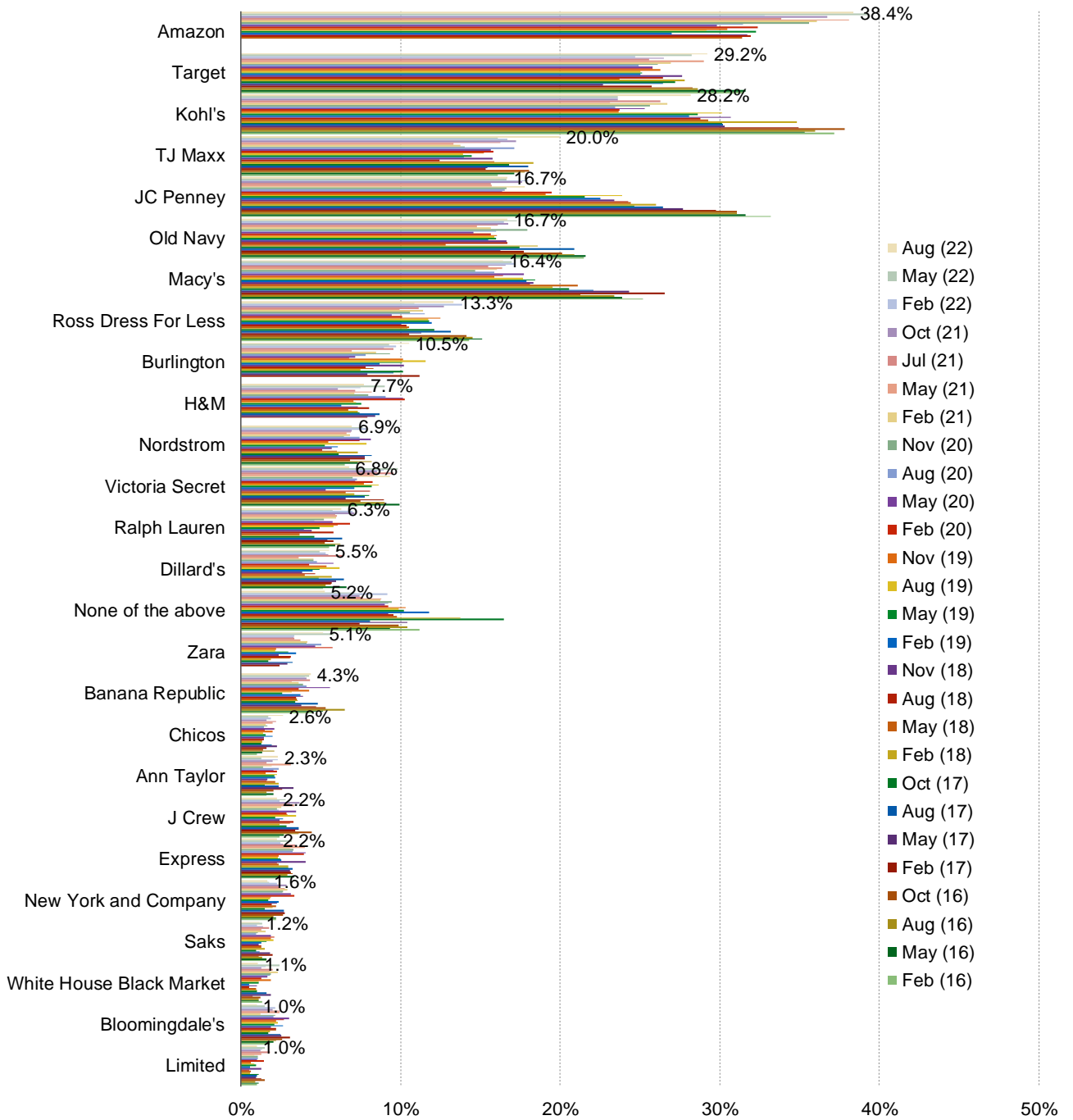
HAVE YOU PURCHASED FROM ANY OF THE FOLLOWING IN THE PAST MONTH (EITHER IN-STORES OR ONLINE)?

Posed to all respondents (1,500 US consumers balanced to census).



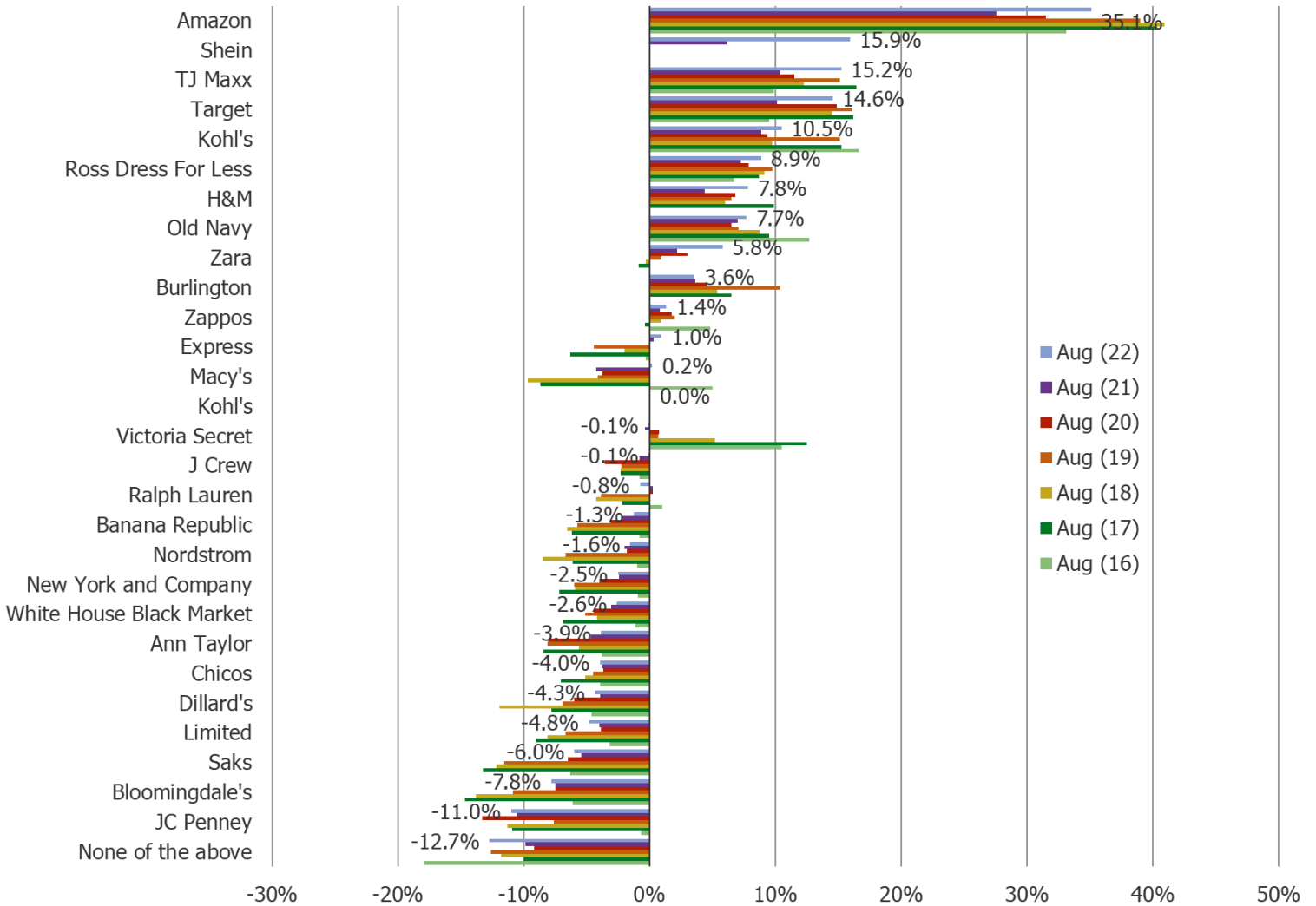
IF YOU WERE SHOPPING FOR CLOTHING FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT?

Posed to all consumers.



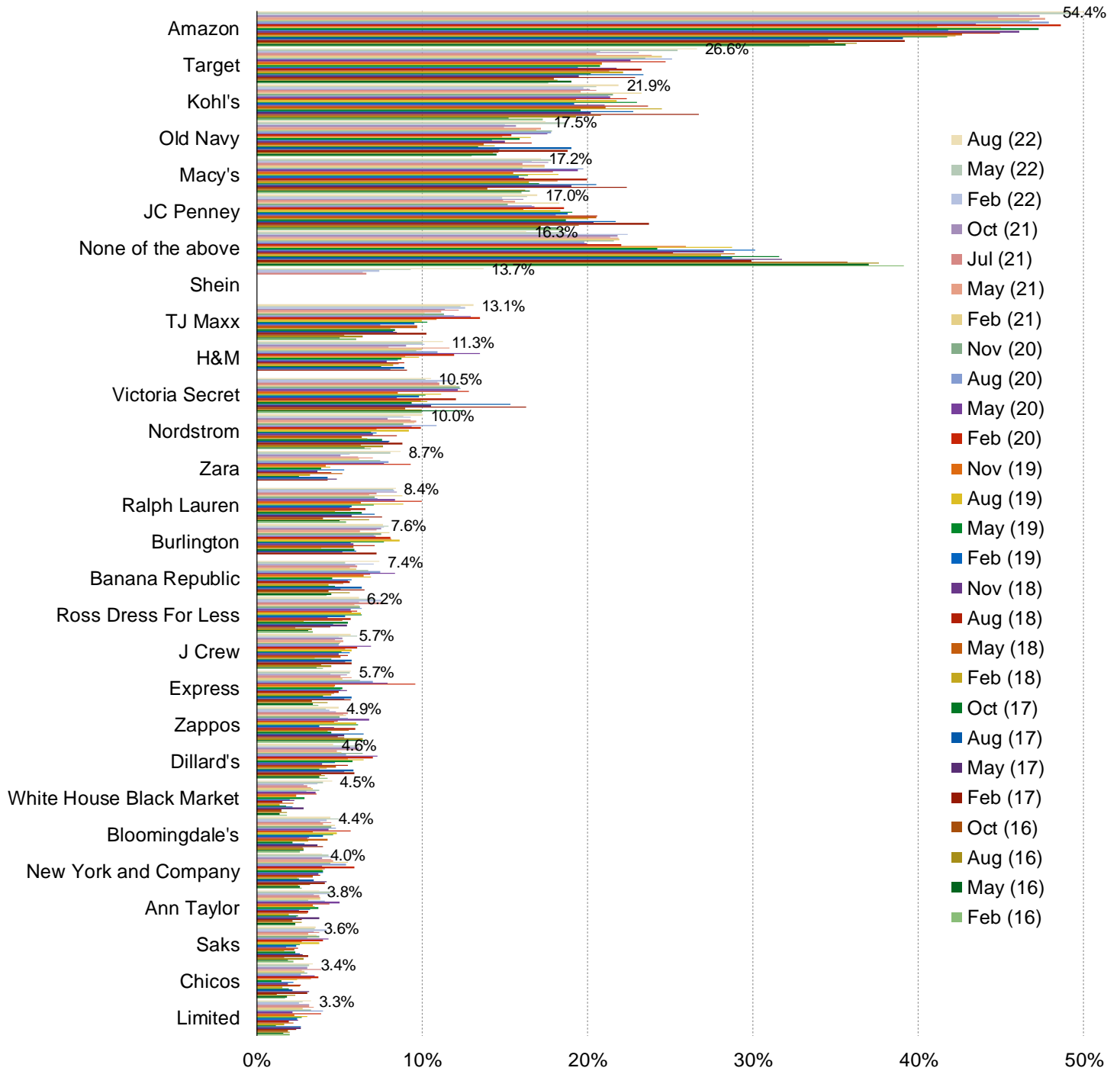
NET POPULARITY CHANGE - % SAID GAINING POPULARITY MINUS % SAID LOSING POPULARITY

Posed to all consumers.



I SHOP FOR CLOTHES OR ACCESSORIES FOR MYSELF ONLINE AT THE FOLLOWING...

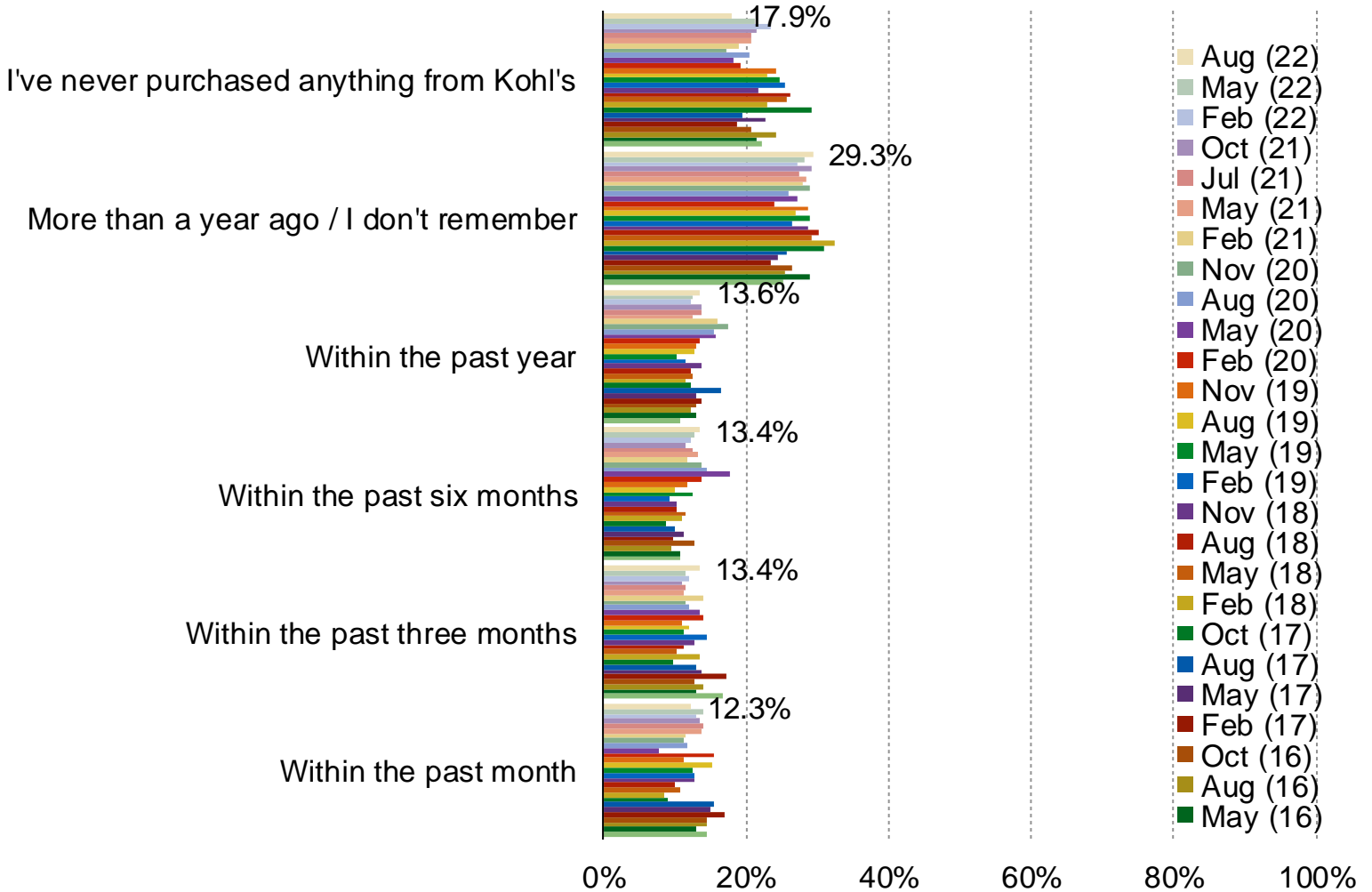
Posed to all consumers.



DEPARTMENT STORE DEEP DIVES: KOHL'S

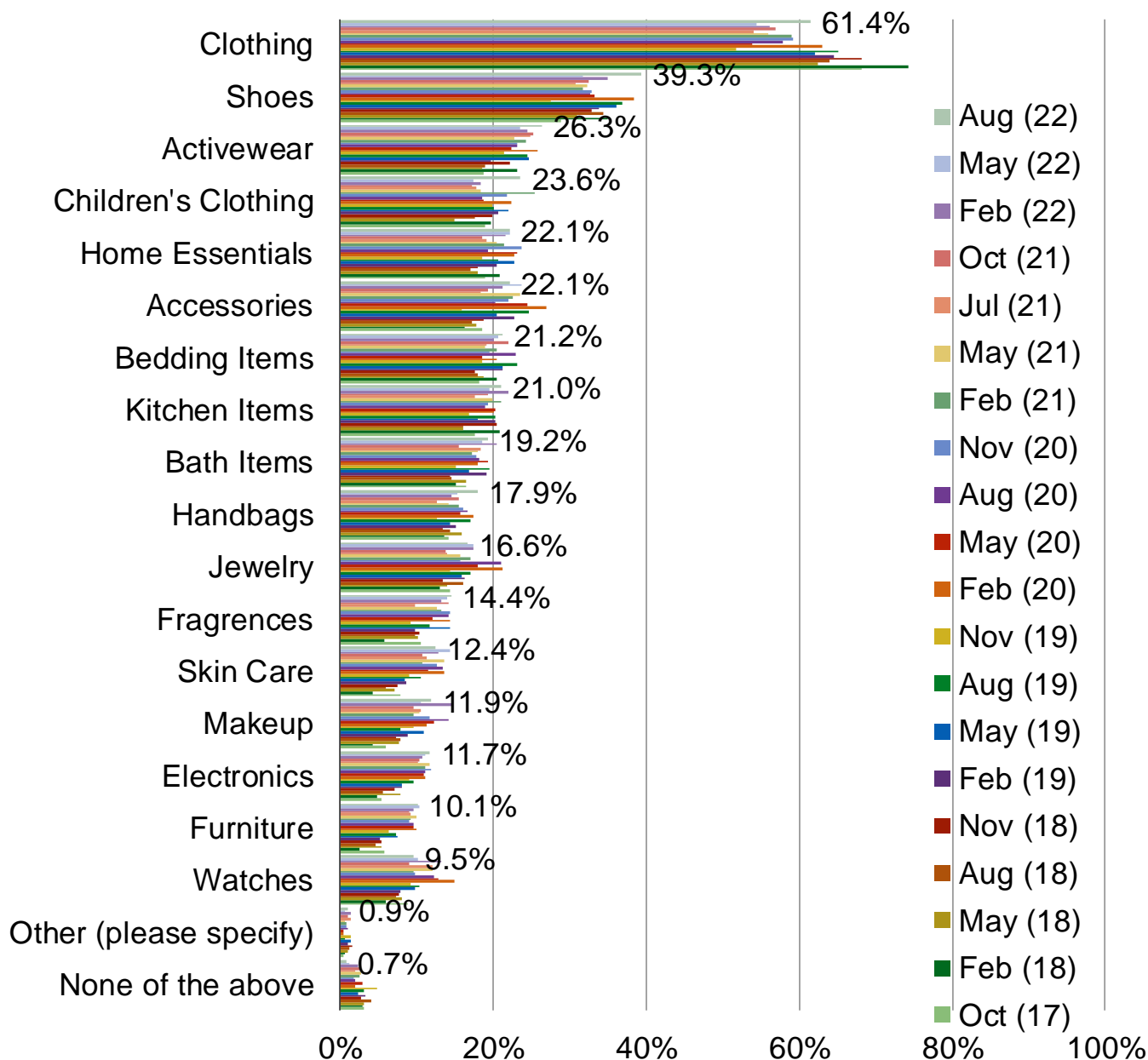
WHEN IS THE LAST TIME YOU PURCHASED SOMETHING FROM KOHL'S?

Posed to all consumers.



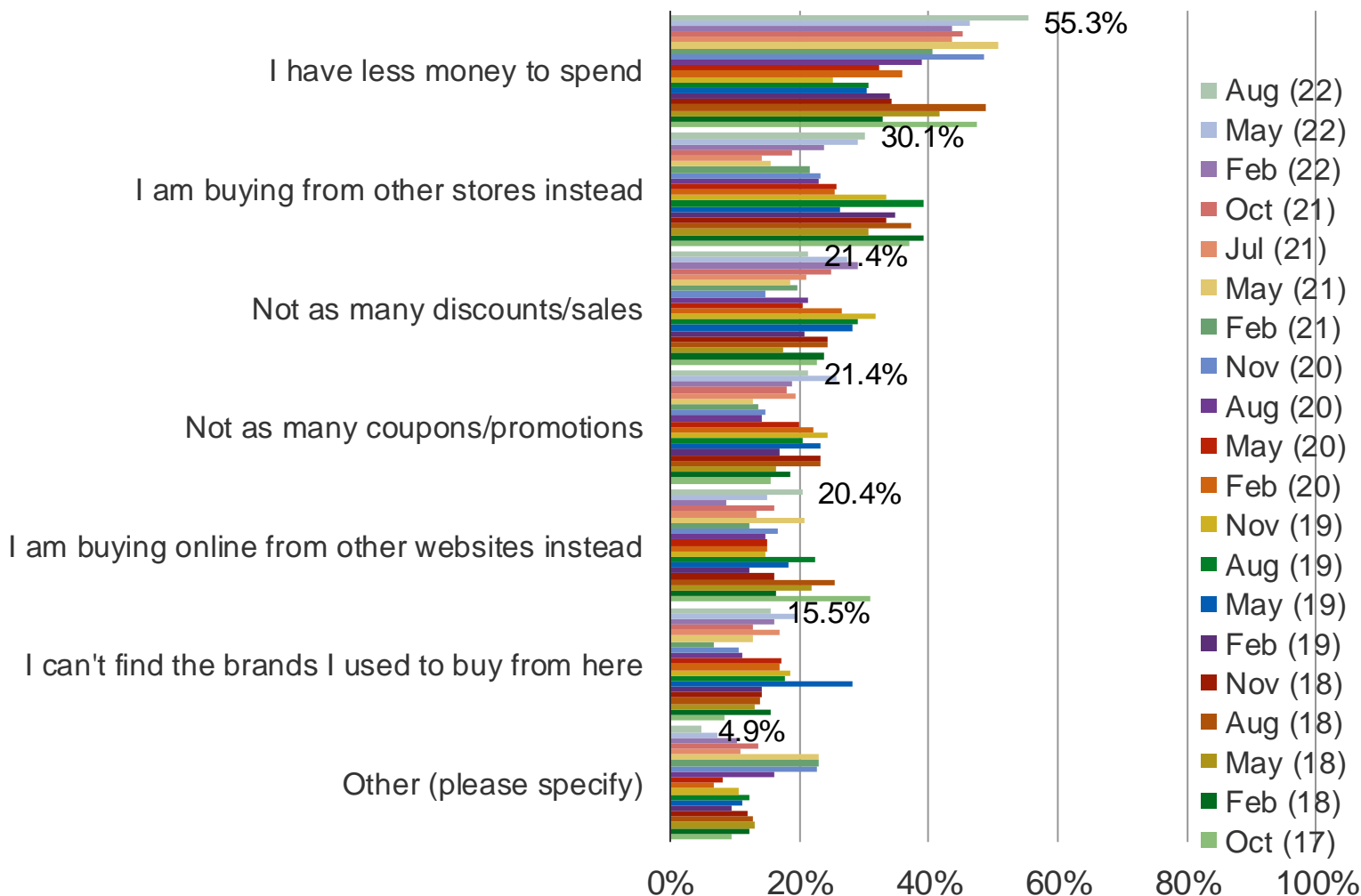
WHAT TYPE OF ITEMS DO YOU TYPICALLY BUY FROM KOHL'S?

Posed to all consumers who purchased from Kohl's in the past year.



RESPONDENTS WHO SAID THEY HAVE BEEN SHOPPING KOHL'S LESS: WHY?

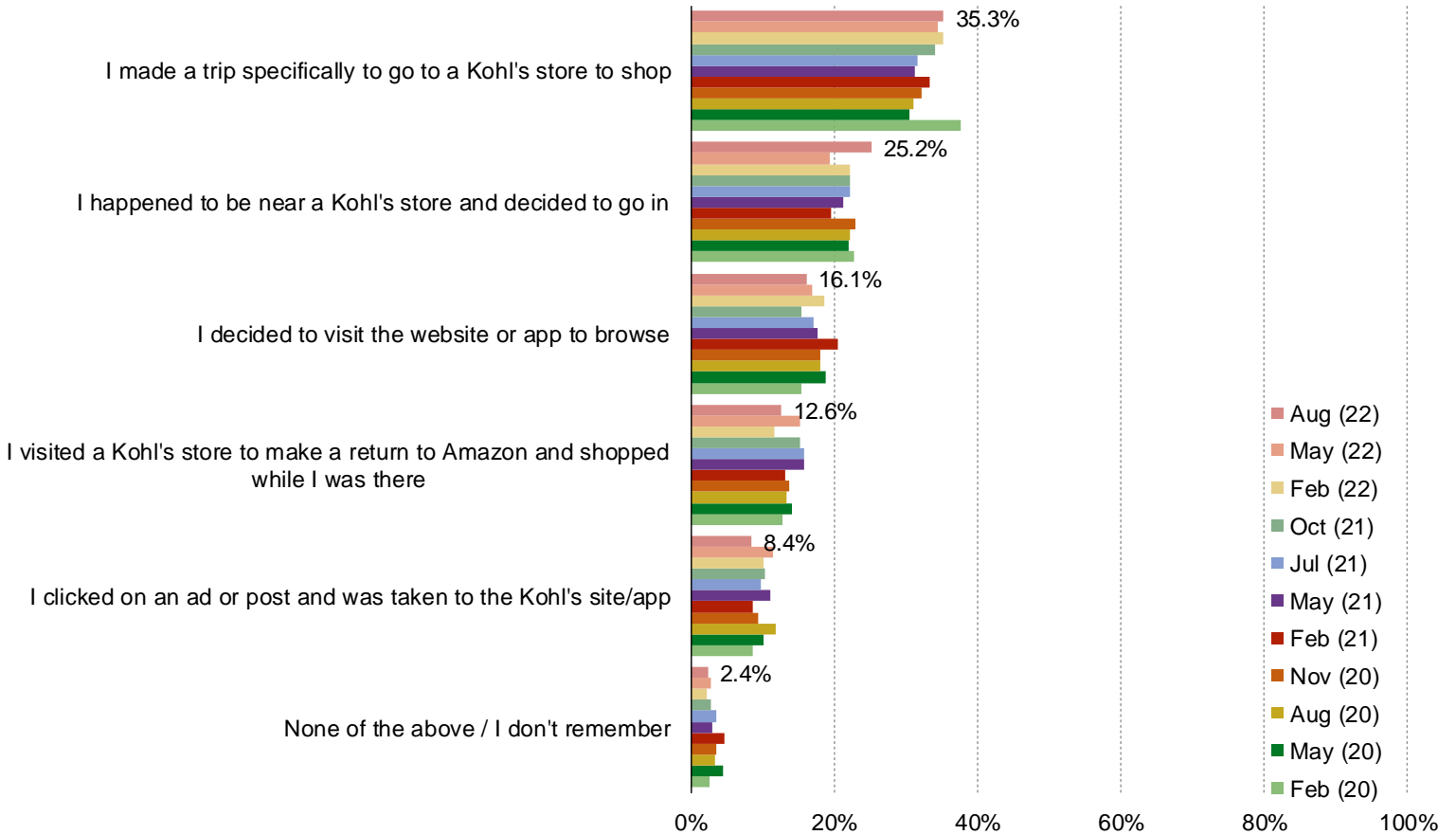
Posed to all consumers who purchased from Kohl's in the past year, but said they are shopping it less compared to a year ago.



KOHL'S AND AMAZON RETURNS

WHICH OF THE FOLLOWING BEST DESCRIBE WHY YOU SHOPPED KOHL'S?

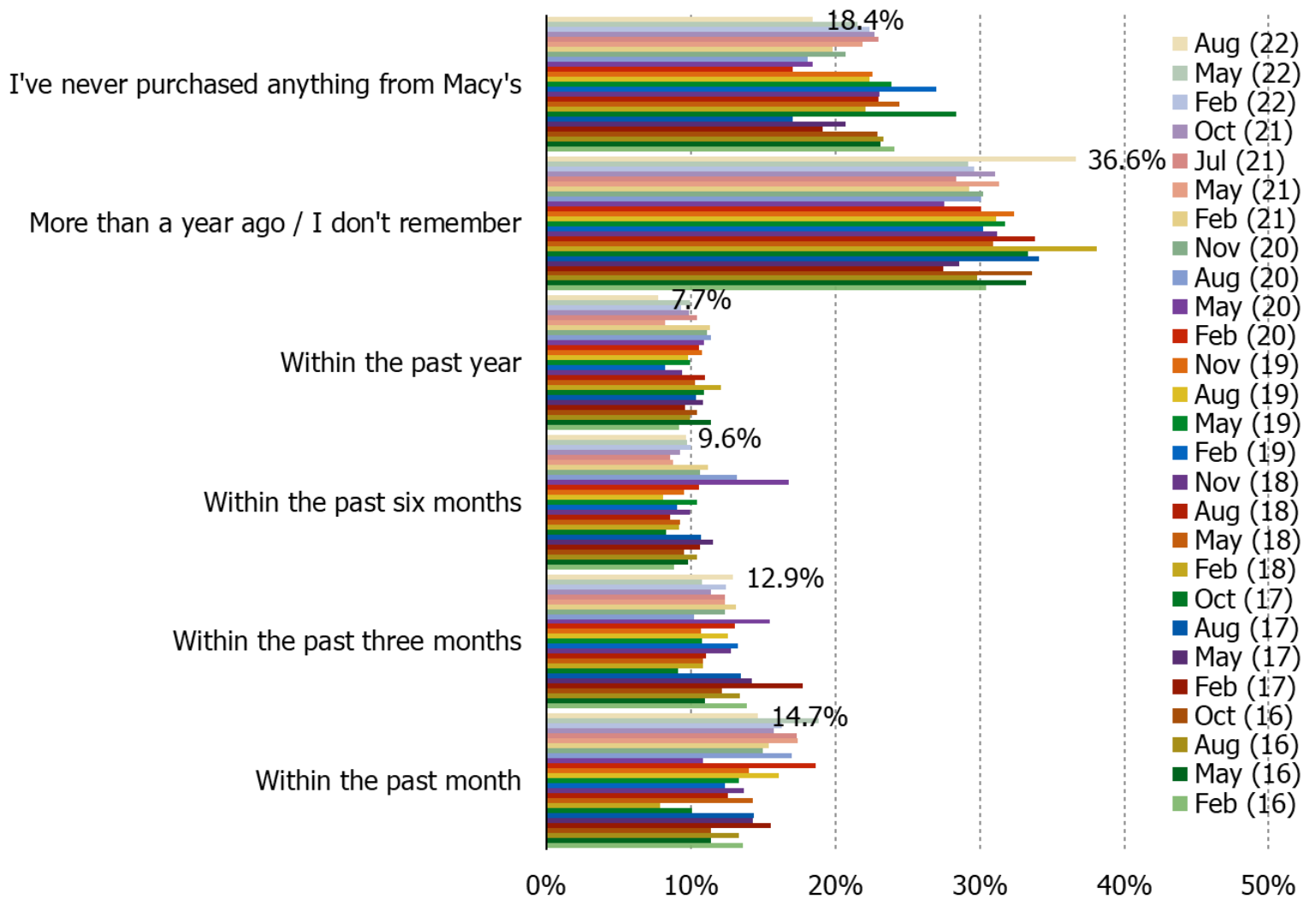
Posed respondents who shopped Kohl's in the past three months



DEPARTMENT STORES DEEP DIVE: MACY'S

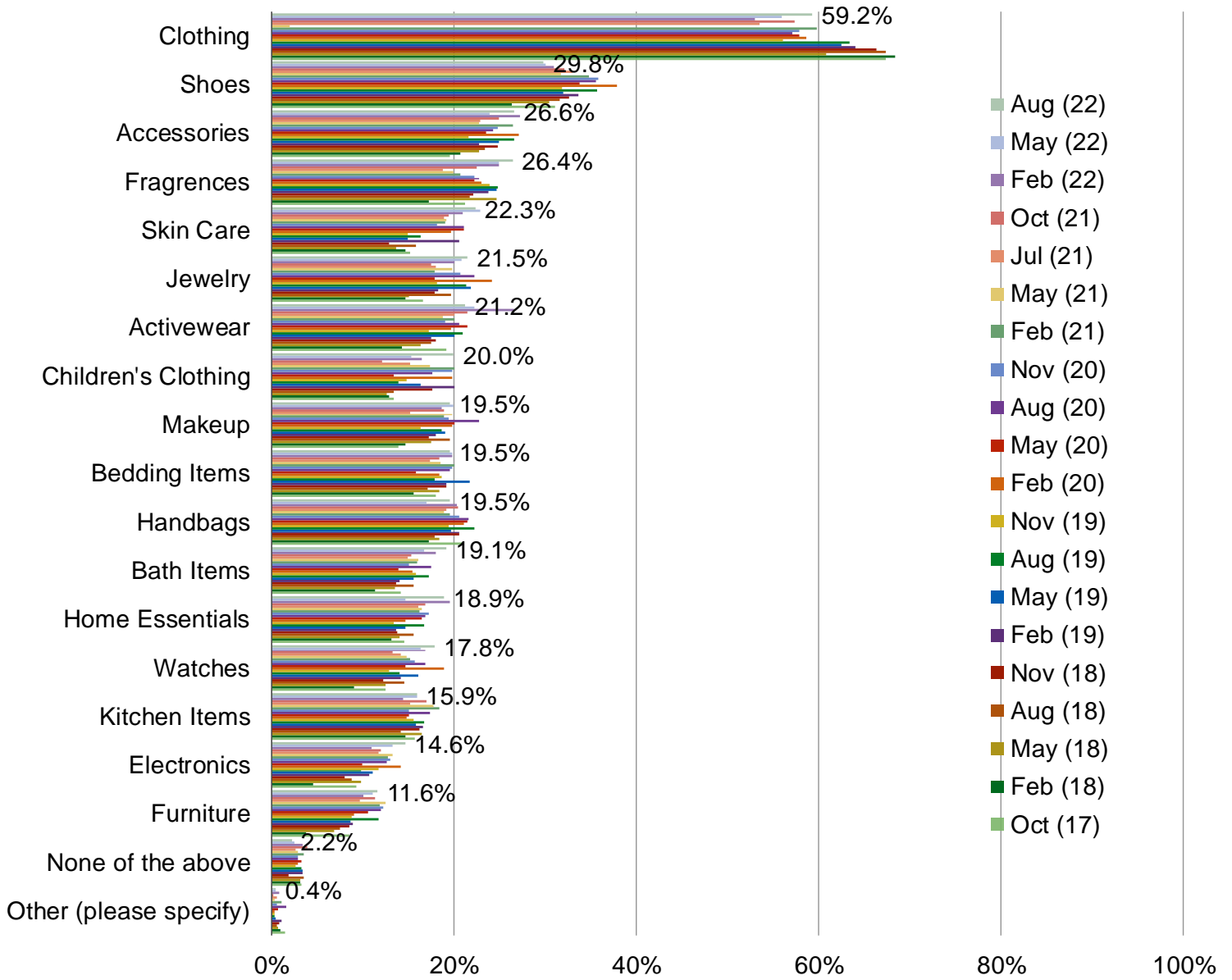
WHEN IS THE LAST TIME YOU PURCHASED SOMETHING FROM MACY'S?

Posed to all consumers.



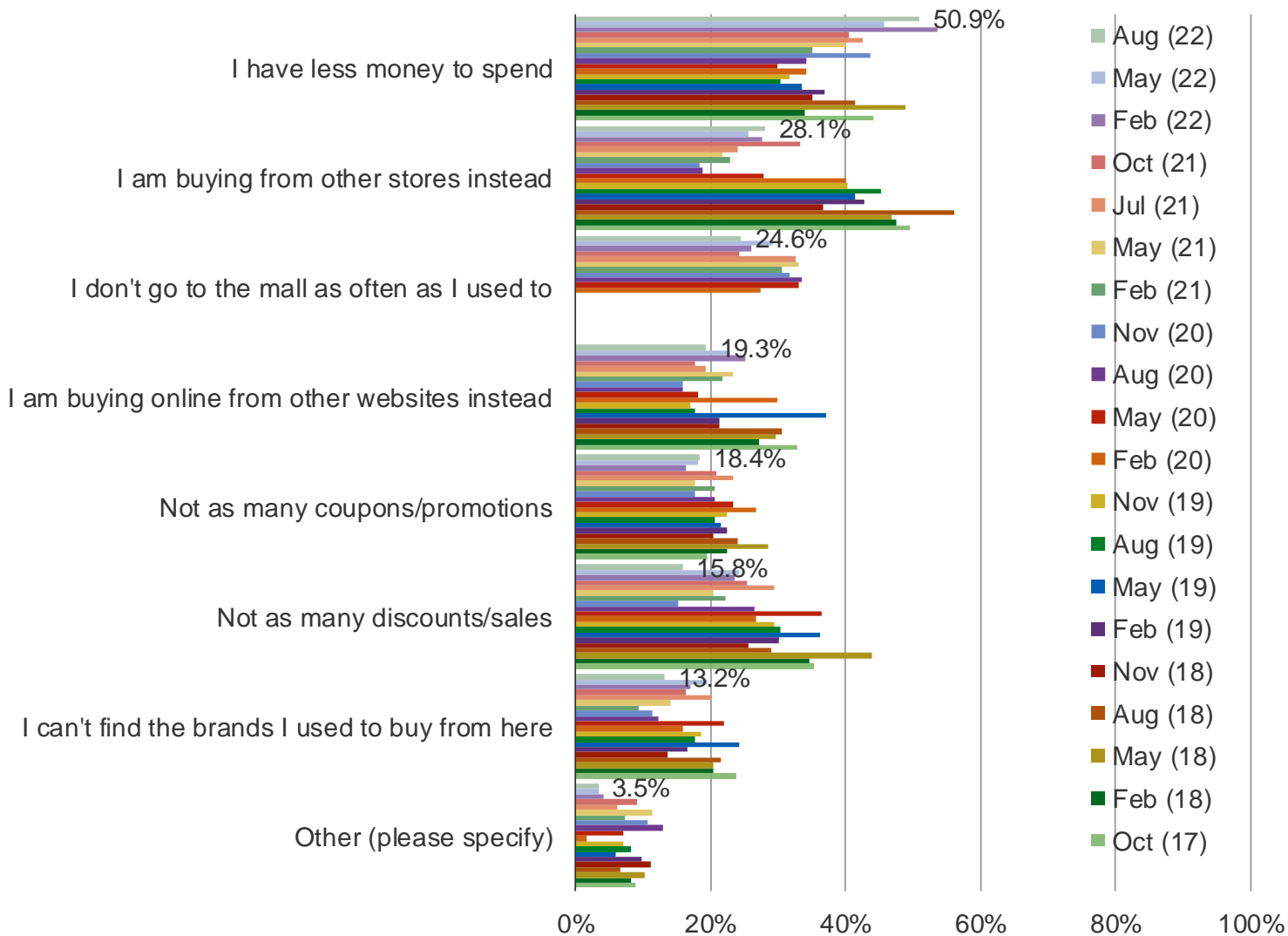
WHAT TYPE OF ITEMS DO YOU TYPICALLY BUY FROM MACY'S?

Posed to all consumers who purchased from Macy's in the past year.



RESPONDENTS WHO SAID THEY HAVE BEEN SHOPPING MACY'S LESS: WHY?

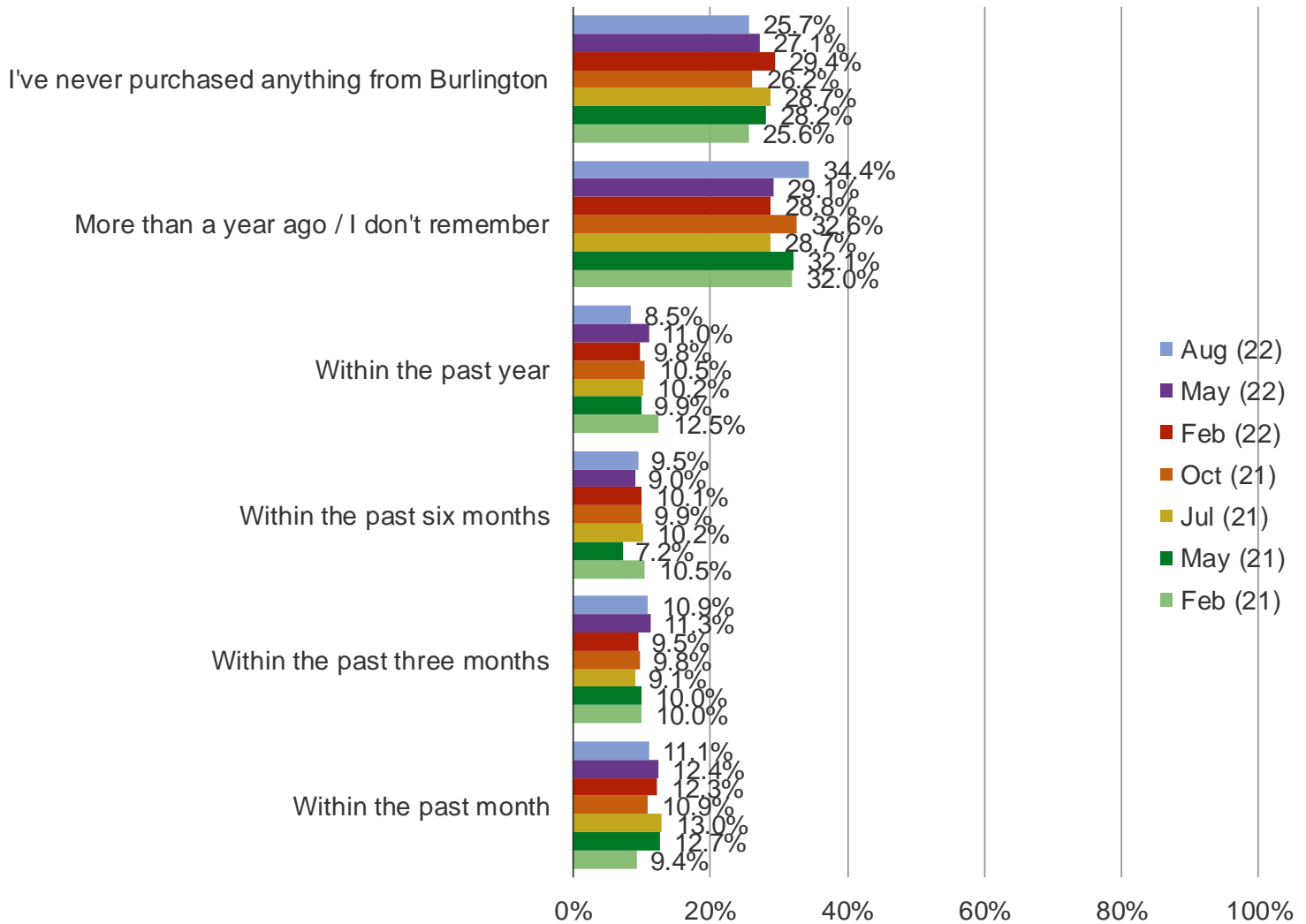
Posed to all consumers who purchased from Macy's in the past year, but said they are shopping it less compared to a year ago.



DEPARTMENT STORES DEEP DIVES: BURLINGTON

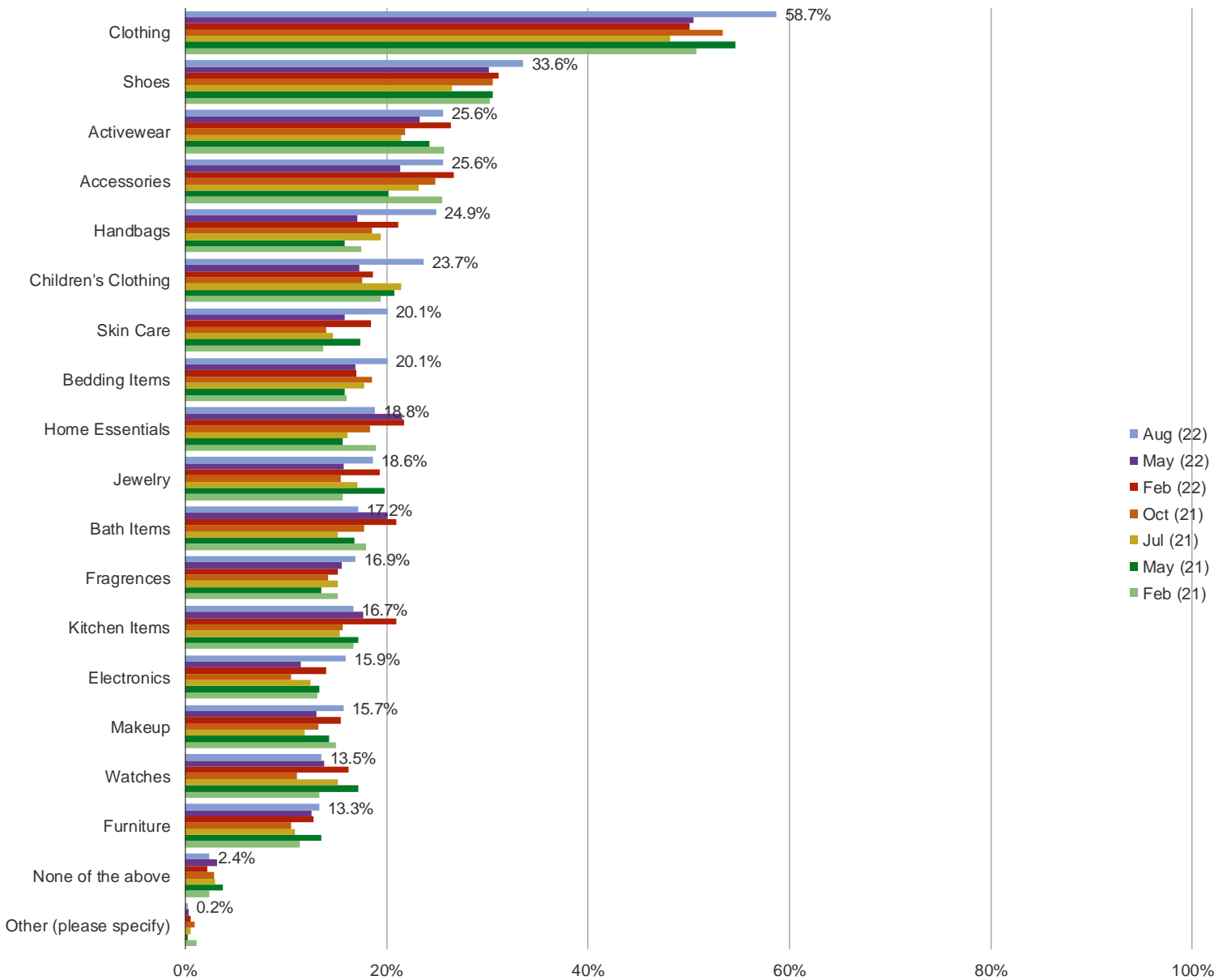
WHEN IS THE LAST TIME THAT YOU BOUGHT CLOTHING OR ACCESSORIES FOR YOURSELF FROM BURLINGTON?

Posed to all consumers.



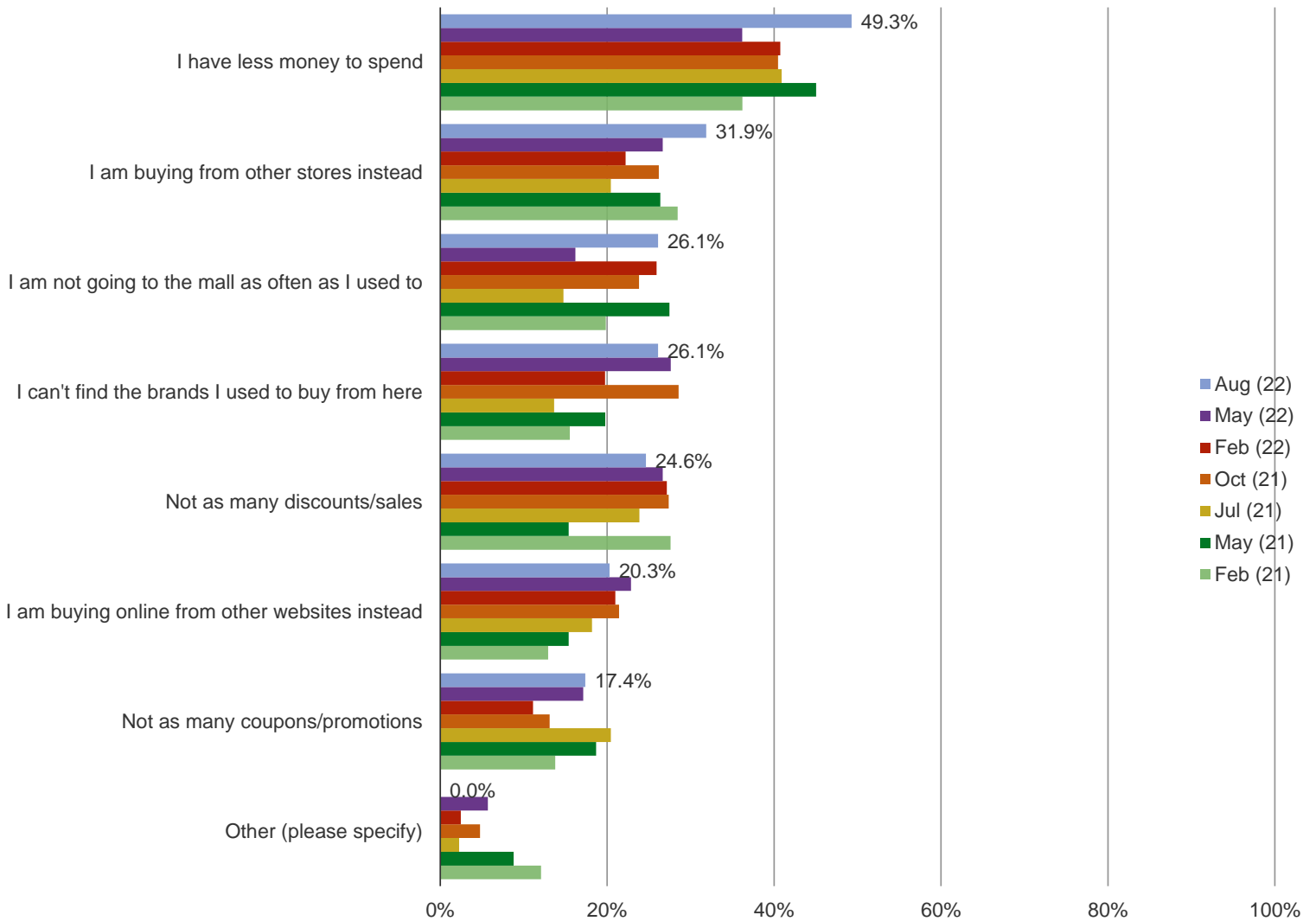
WHAT TYPES OF ITEMS DO YOU TYPICALLY BUY FROM BURLINGTON?

Posed to all consumers who purchased from Burlington in the past year.



RESPONDENTS WHO SAID THEY HAVE BEEN SHOPPING BURLINGTON LESS: WHY?

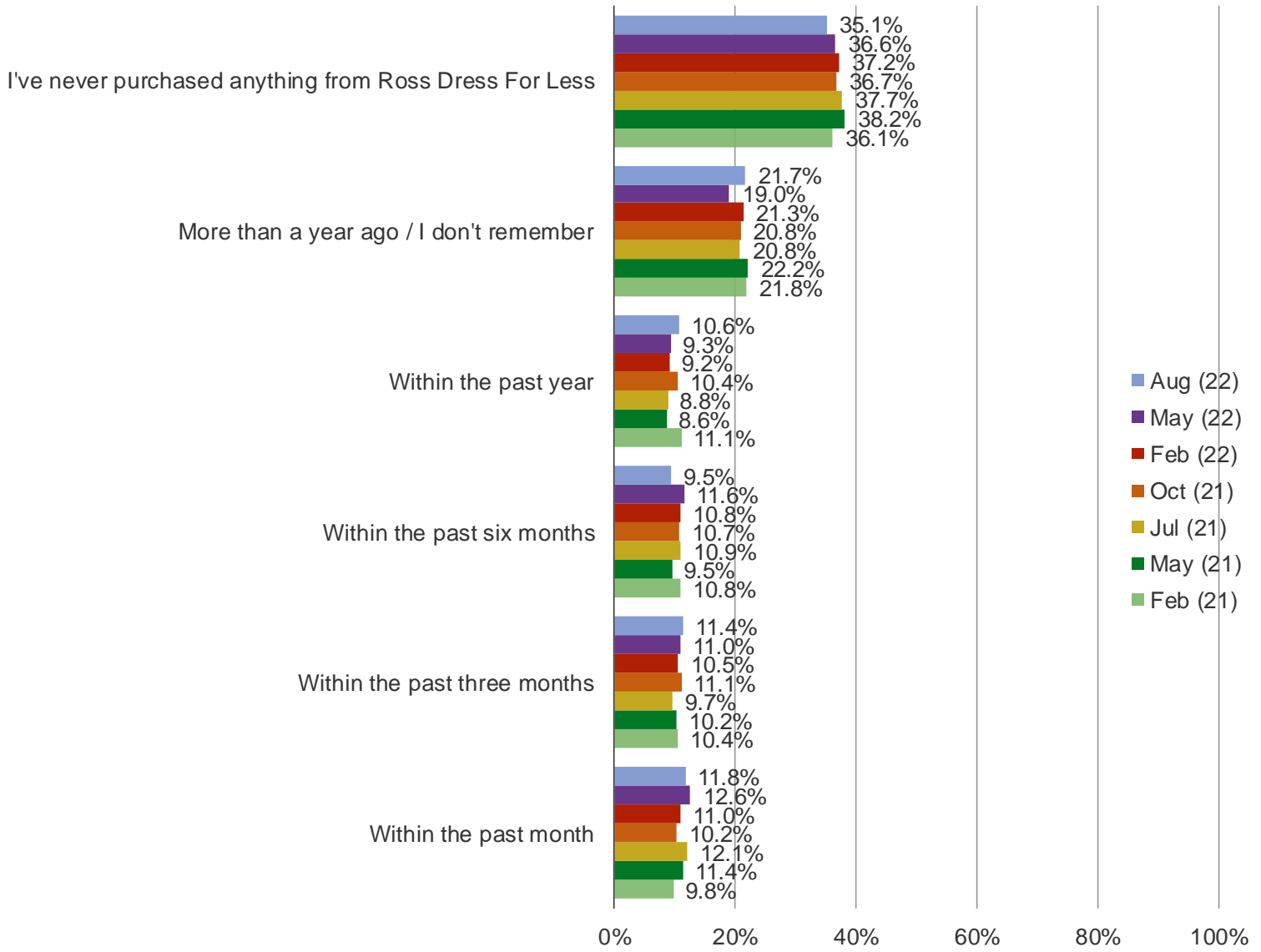
Posed to all consumers who purchased from Burlington in the past year, but said they are shopping it less compared to a year ago.



DEPARTMENT STORES DEEP DIVES: ROSS

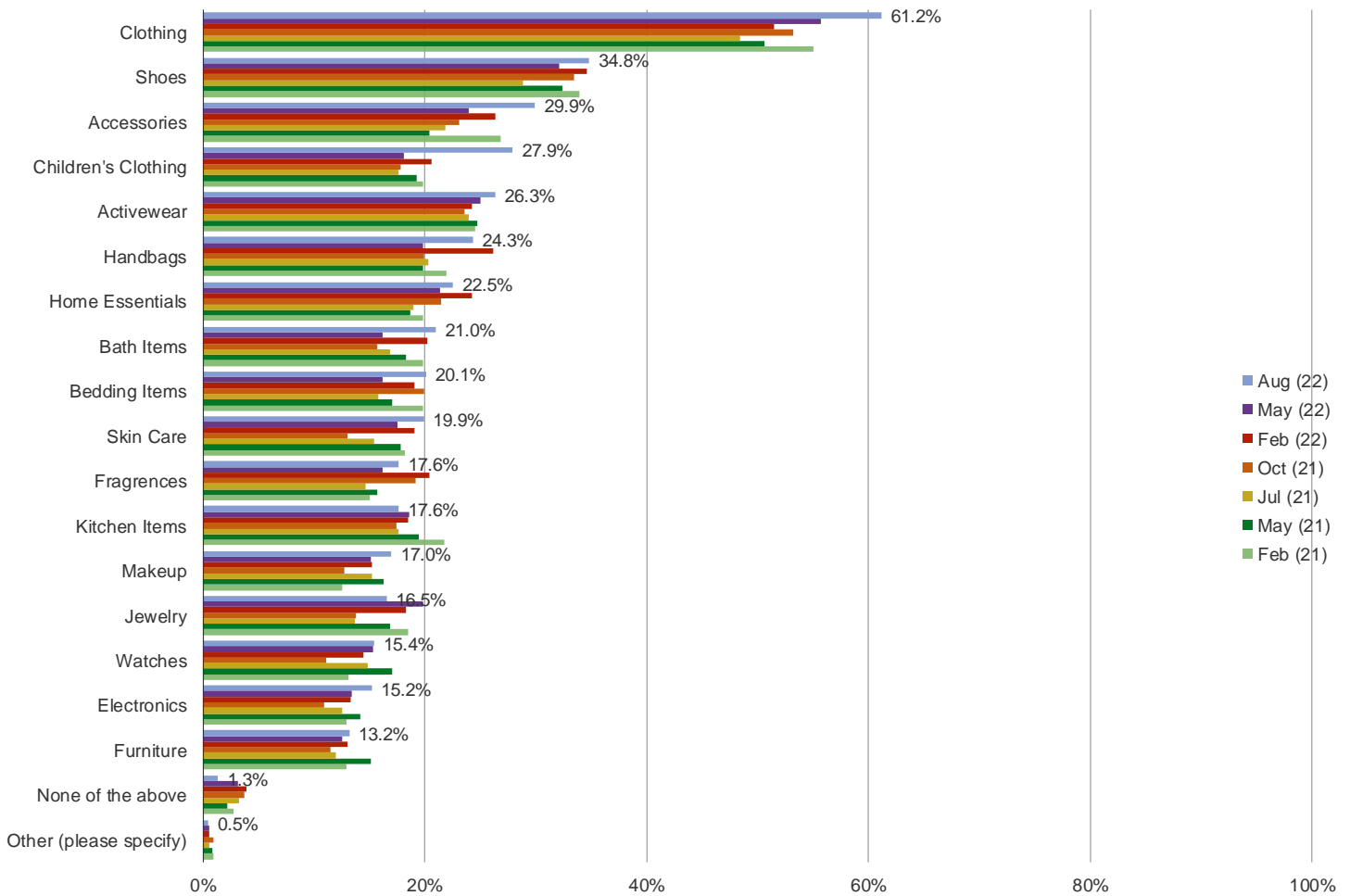
WHEN IS THE LAST TIME THAT YOU BOUGHT CLOTHING OR ACCESSORIES FOR YOURSELF FROM ROSS DRESS FOR LESS?

Posed to all consumers.



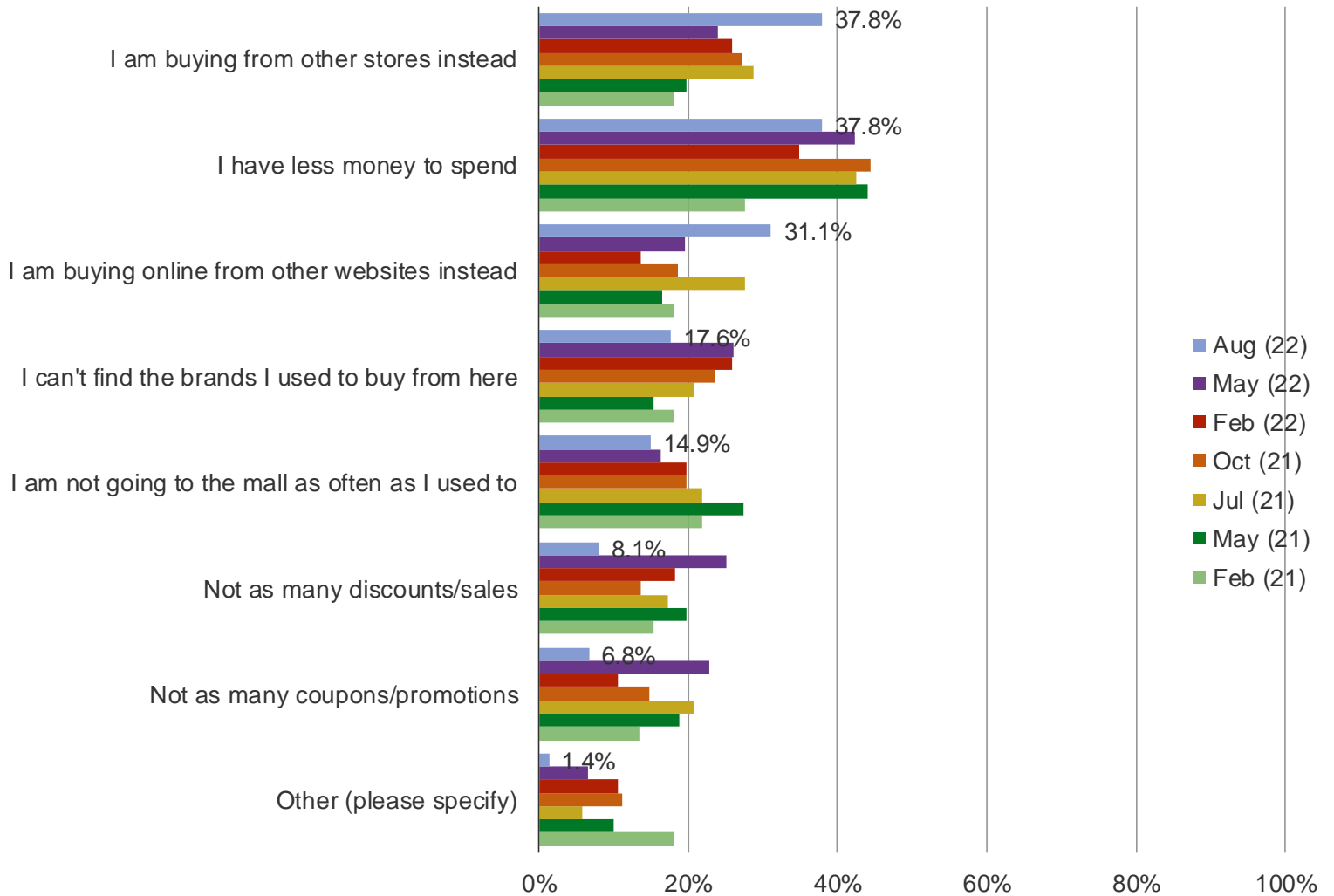
WHAT TYPES OF ITEMS DO YOU TYPICALLY BUY FROM ROSS DRESS FOR LESS?

Posed to all consumers who purchased from Ross in the past year.



RESPONDENTS WHO SAID THEY HAVE BEEN SHOPPING ROSS LESS: WHY?

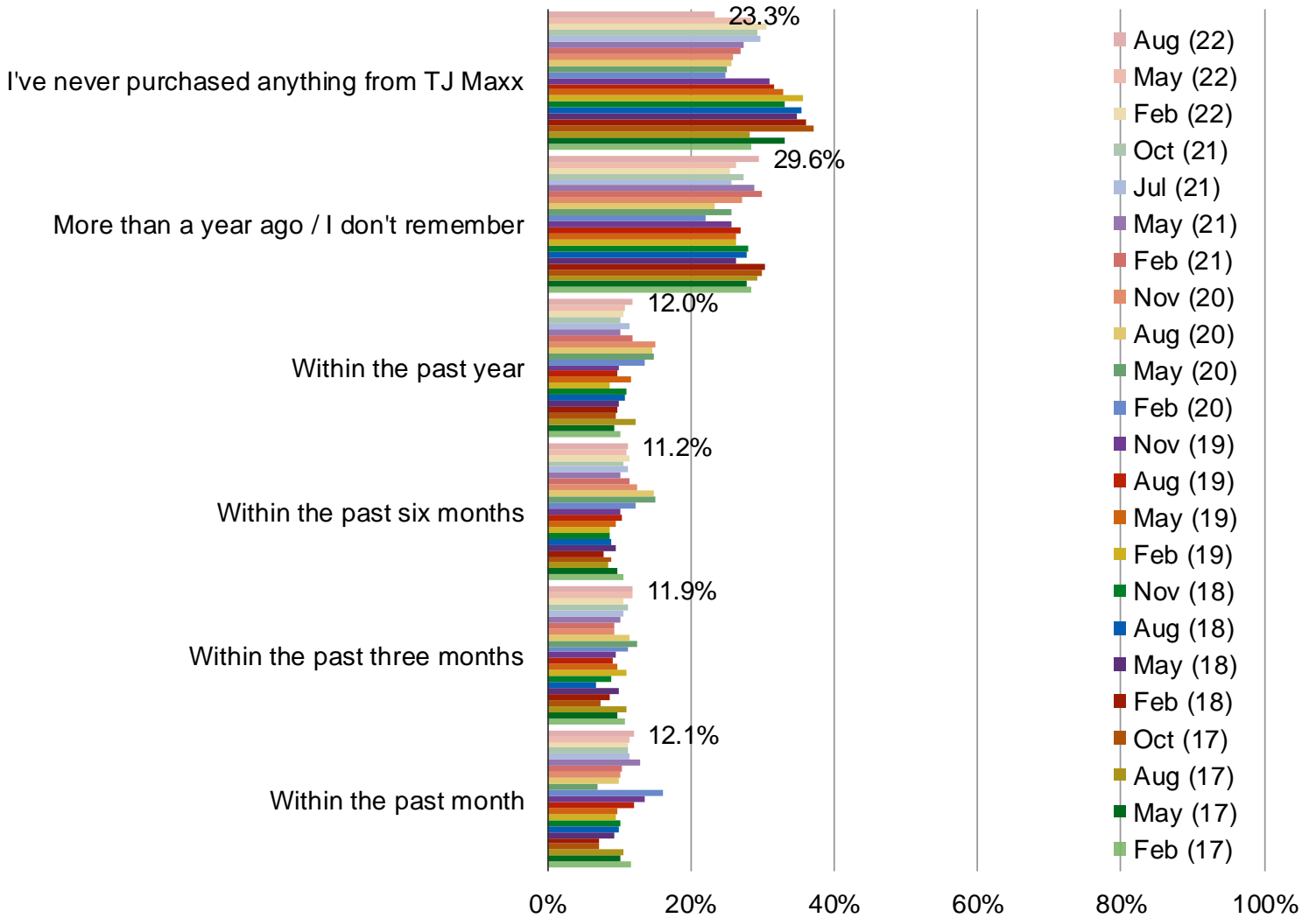
Posed to all consumers who purchased from Ross in the past year, but said they are shopping it less compared to a year ago.



DEPARTMENT STORES DEEP DIVES: TJ MAXX

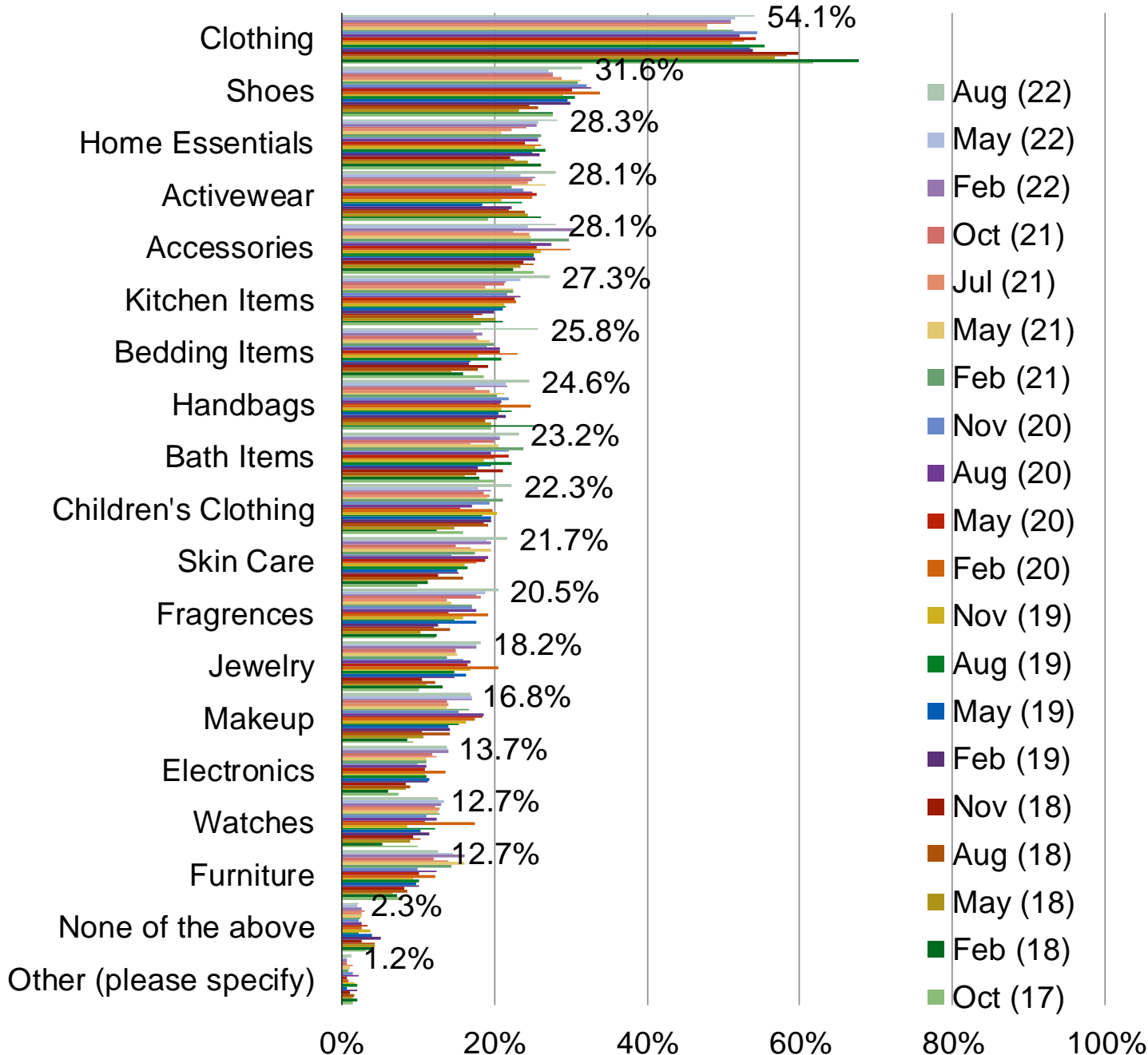
WHEN IS THE LAST TIME YOU PURCHASED SOMETHING FROM TJ MAXX?

Posed to all consumers.



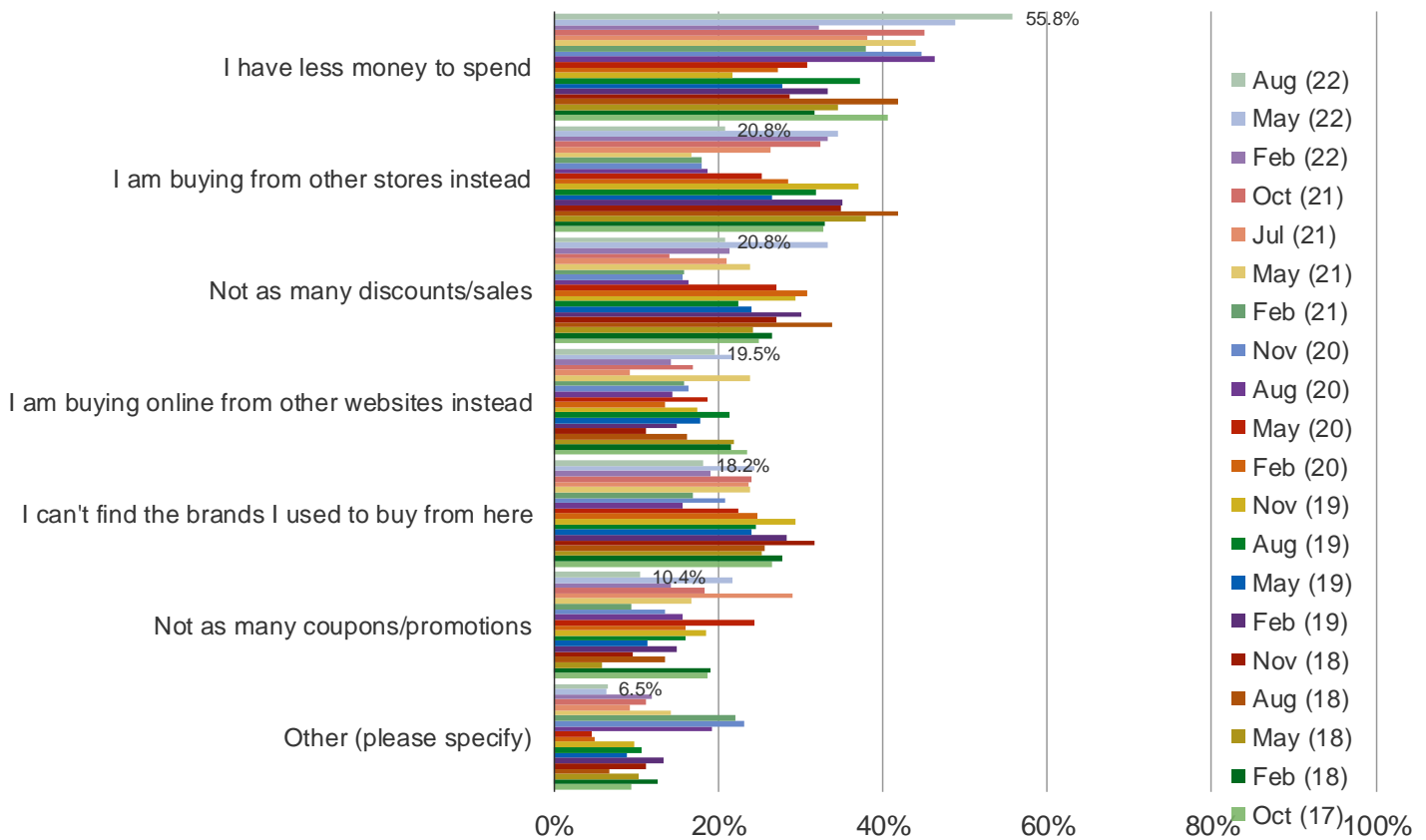
WHAT TYPE OF ITEMS DO YOU TYPICALLY BUY FROM TJ MAXX?

Posed to all consumers who purchased from TJ Maxx in the past year.



RESPONDENTS WHO SAID THEY HAVE BEEN SHOPPING TJ MAXX LESS: WHY?

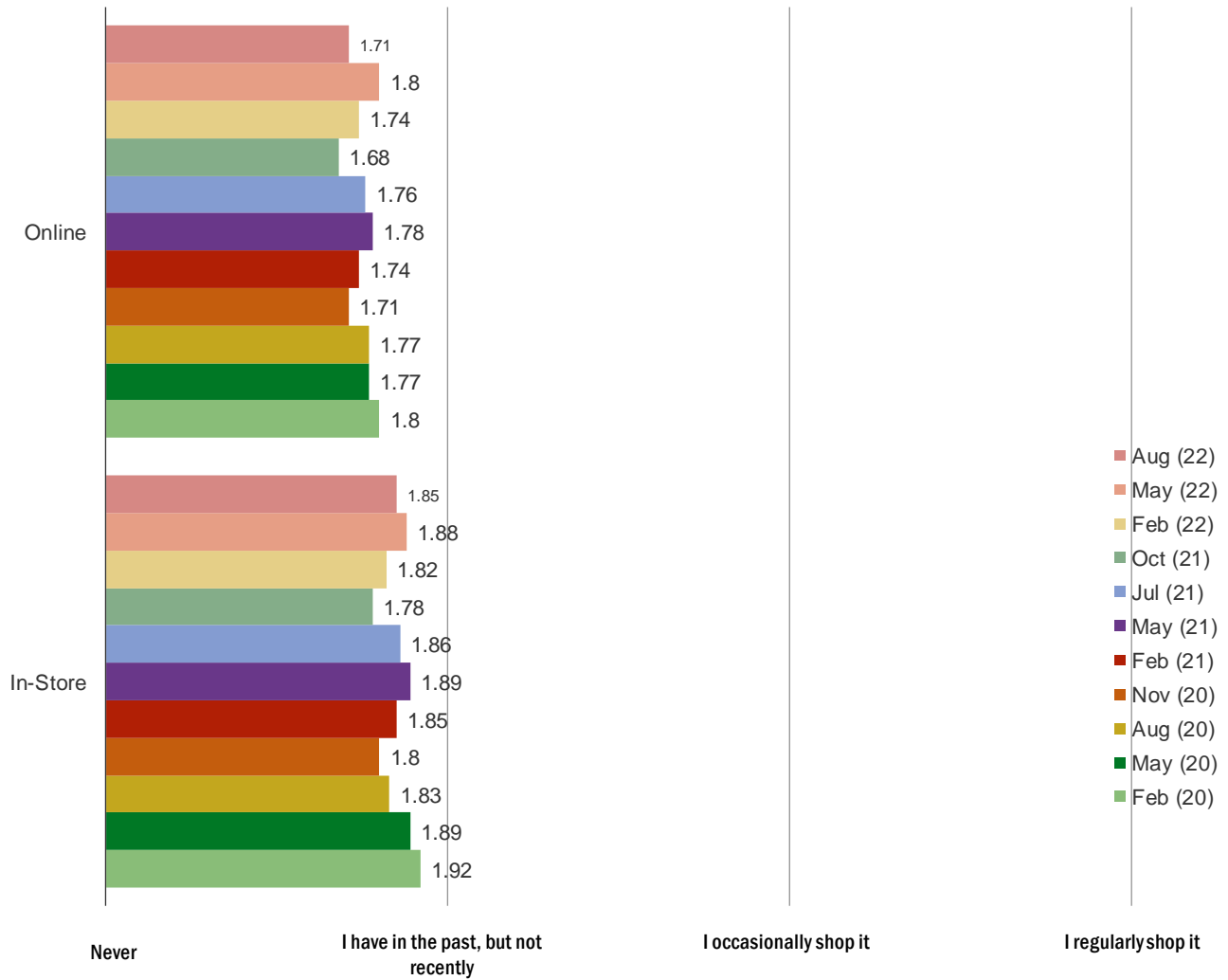
Posed to all consumers who purchased from TJ Maxx in the past year, but said they are shopping it less compared to a year ago.



NORDSTROM RACK

HOW OFTEN DO YOU SHOP NORDSTROM RACK?

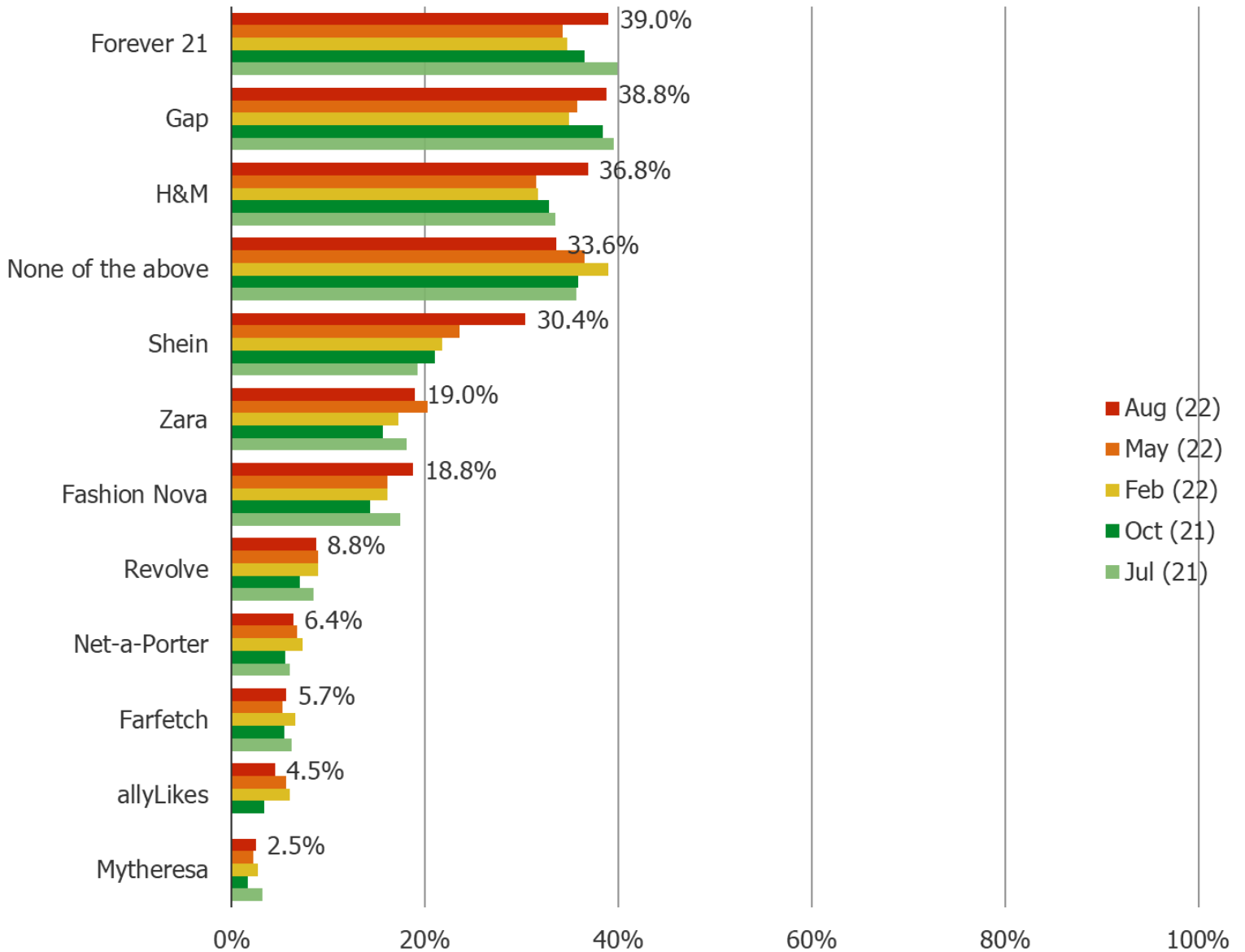
Posed to all respondents.



DEEPER DIVE ON SHEIN, SECOND HAND, FASHION CLOTHING, ETC.

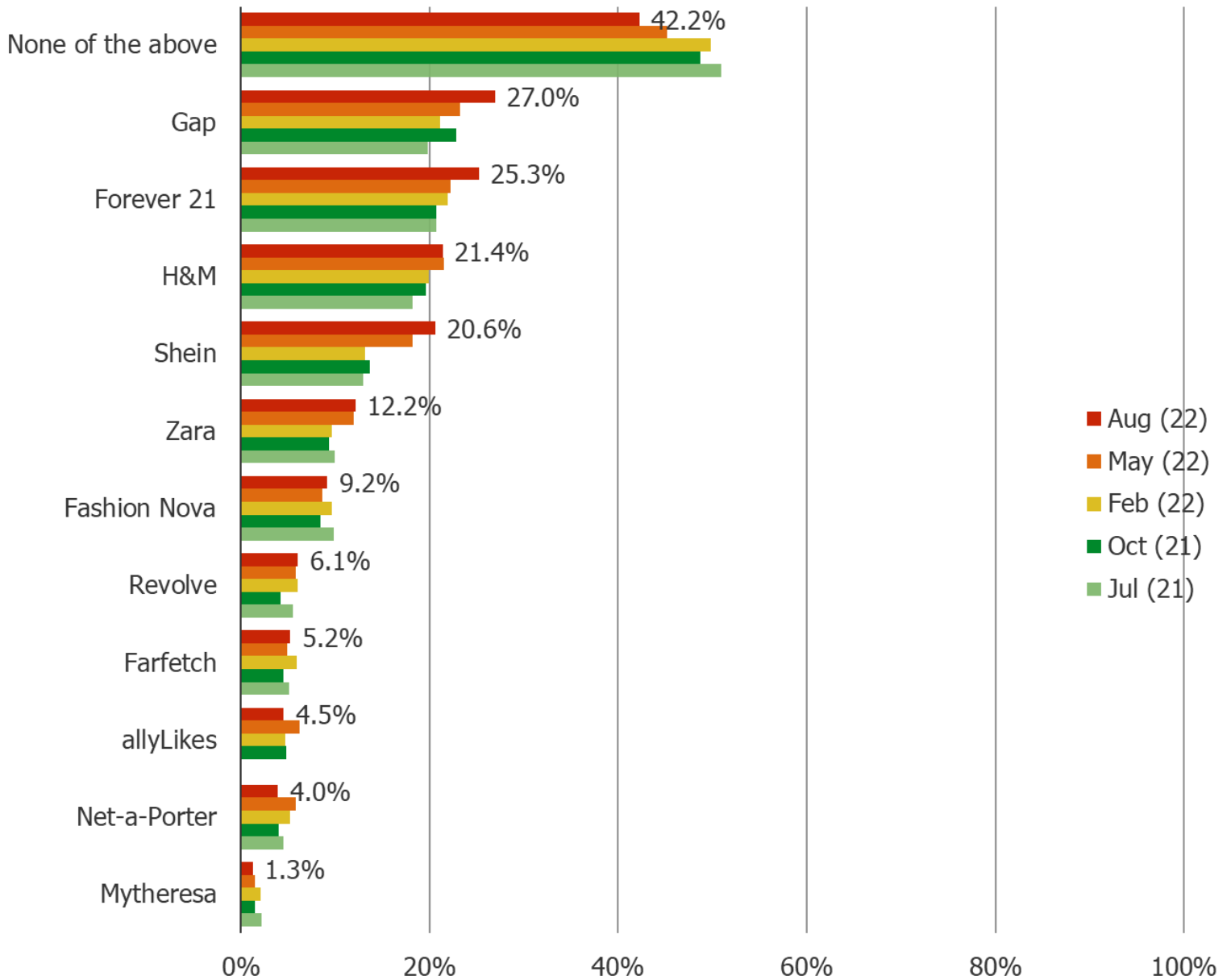
ARE YOU FAMILIAR WITH ANY OF THE FOLLOWING SITES/APPS?

Posed to all respondents.



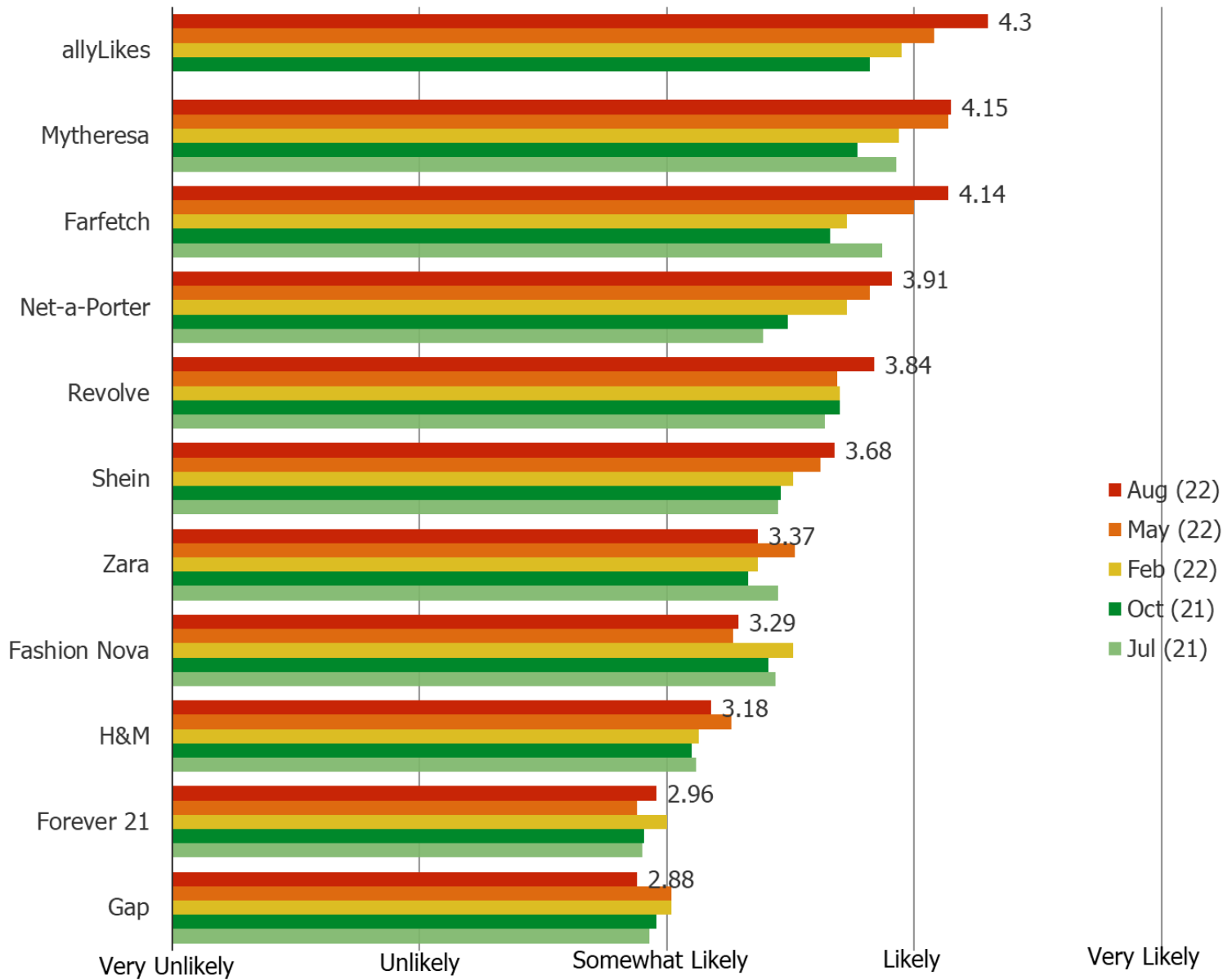
HAVE YOU EVER MADE A PURCHASE FROM ANY OF THE FOLLOWING?

Posed to all respondents.



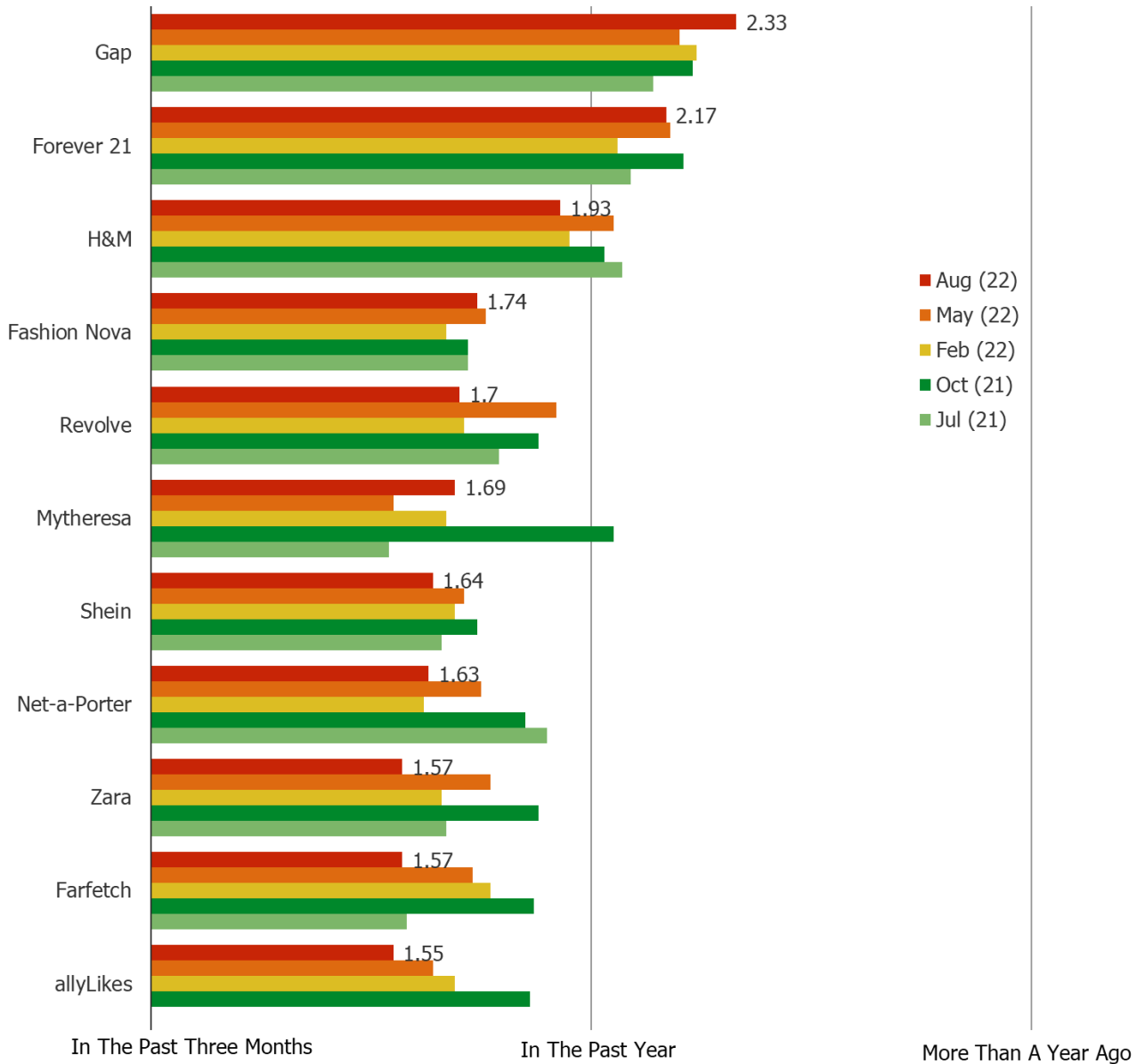
HOW LIKELY ARE YOU TO PURCHASE FROM THE FOLLOWING IN THE FUTURE?

Posed to respondents who are familiar with each of the following.



WHEN DID YOU MOST RECENTLY PURCHASE FROM THE FOLLOWING?

Posed to respondents who have purchased from each of the following.

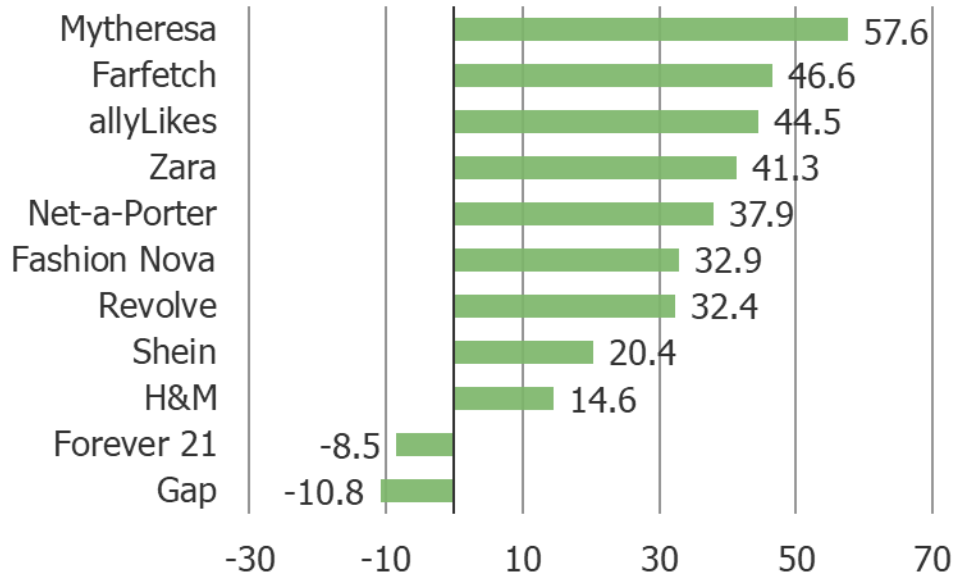


More Recent



WHEN DID YOU MOST RECENTLY PURCHASE FROM THE FOLLOWING?

Posed to respondents who have purchased from each of the following.



	NPS	N =
Gap	-10.8	581
Forever 21	-8.5	551
H&M	14.6	501
Shein	20.4	450
Revolve	32.4	139
Fashion Nova	32.9	207
Net-a-Porter	37.9	116
Zara	41.3	281
allyLikes	44.5	128
Farfetch	46.6	118
Mytheresa	57.6	33

Combining data from April and August to reach larger N sizes.