

Bespoke Survey Research

August 2023

Department Stores

Volume 32 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: M, BURL, ROST, KSS, TJX.

KPIs and Key questions

1. Consumers have net-favorable views of department stores and clothing retailers, but opinions worsened a bit sequentially compared to historical waves.
2. Department store customer sentiment toward product selection and sales/promo offers is net positive, but worse compared to historical waves.
3. Of the stores we deep-dive on (Macy's, Burlington, Kohl's, TJ Maxx, and Ross), self-reported engagement/spending KPIs that we track softened sequentially.
4. Among those who self-report shopping at department stores less, an increasing percentage say they have less money to spend or that they are buying from other stores instead.
5. Viewed by consumers as popularity gainers, in this order (Amazon, Temu, Shein, Wal-Mart, TJ Maxx, Ross, Target, H&M, Kohl's, Zara, Old Navy, Burlington).
6. Viewed by consumers as popularity losers, in this order (JC Penney, Dillard's, Banana Republic, Bloomingdale's, Macy's, New York & Company, Ann Taylor, J Crew, Saks, Chicos, Limited, White House Black Market, Nordstrom, Express, Zappos, Victoria Secret, Ralph Lauren).
7. Temu popularity has increased considerably in the short time since we started covering it. Shein has also been a consistent significant popularity gainer.
8. Temu and Shein both have cross-over with a lot of customer bases across retail – and it seems that Temu is more likely to over-index to a retailer like a Wal-Mart and that Shein is more likely to over-index to clothing retailers.

Noteworthy Stats:

55.2% Of respondents like to strongly like the treasure hunt shopping experience.

34.4% Of respondents would turn to Amazon if they were shopping for clothing today.

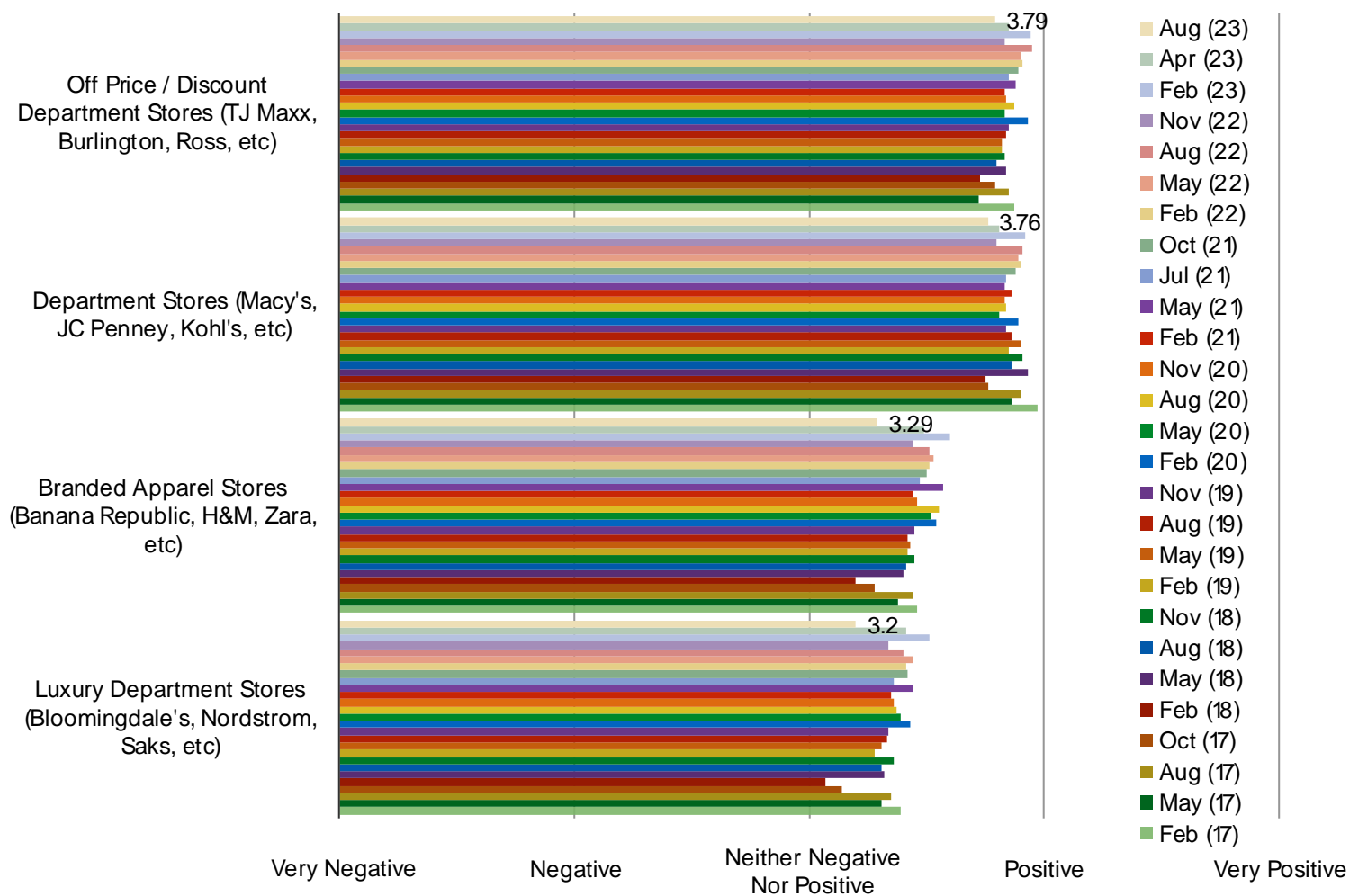
7.5% Of respondents would turn to Shein if they were shopping for clothing today.

6.4% Of respondents would turn to Temu if they were shopping for clothing today.

DEPARTMENT STORE CHANNEL SENTIMENT

ALL CONSUMERS: OPINION OF EACH TYPE OF RETAILER

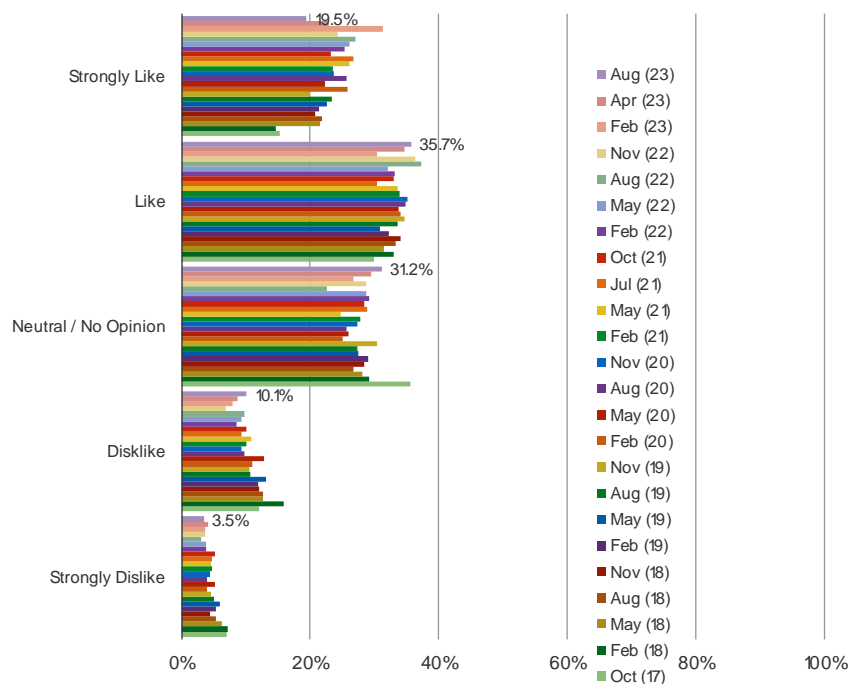
Posed to all consumers.



TREASURE HUNT SHOPPING EXPERIENCE

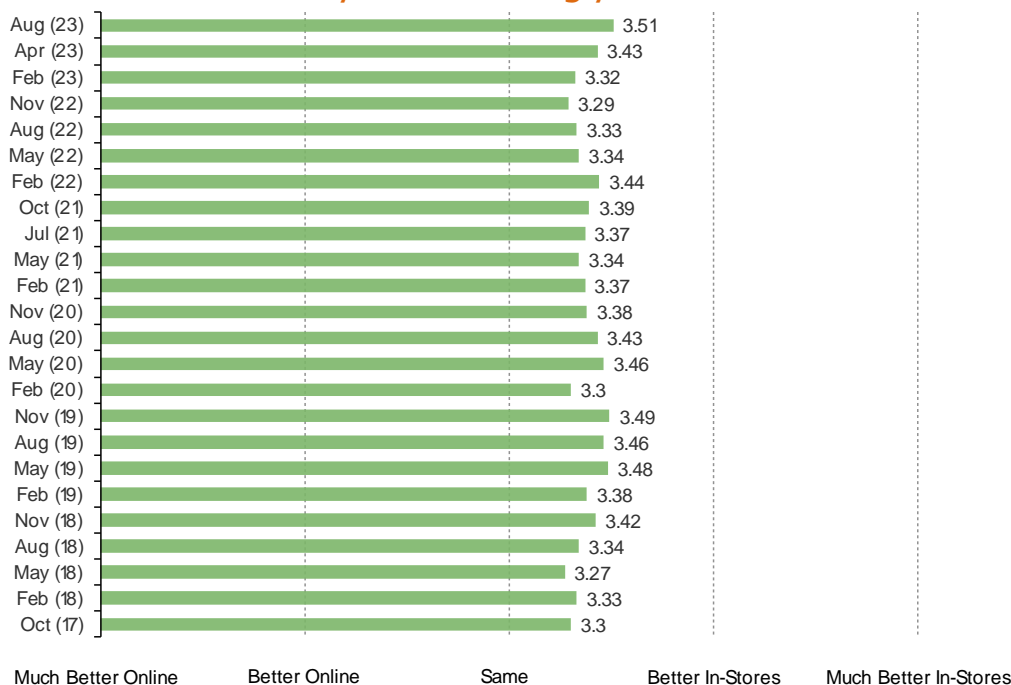
DO YOU LIKE THE TREASURE HUNT TYPE OF SHOPPING EXPERIENCE WHERE BRANDS/PRODUCTS AVAILABLE AT A DISCOUNTED PRICE CHANGE OFTEN?

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

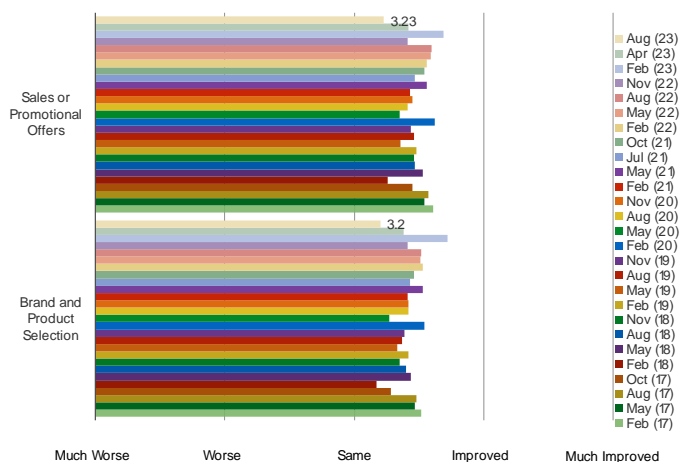
BESPOKE Surveys

Department Stores

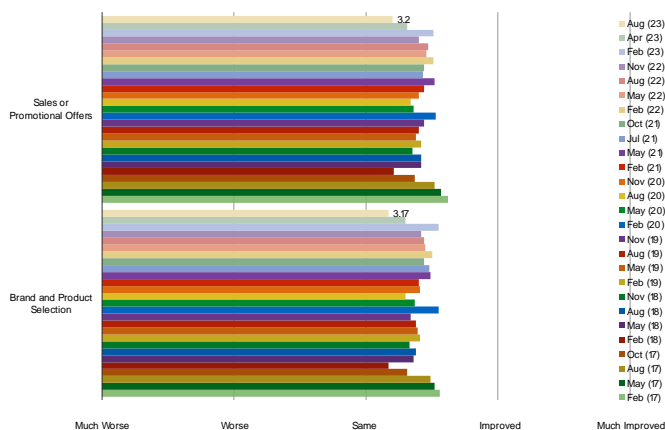
HAVE YOU NOTICED ANY CHANGES IN THE FOLLOWING WHILE SHOPPING AT _____?

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

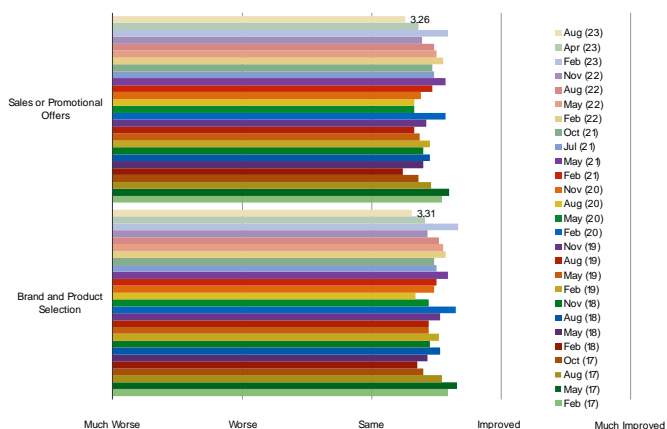
Macy's



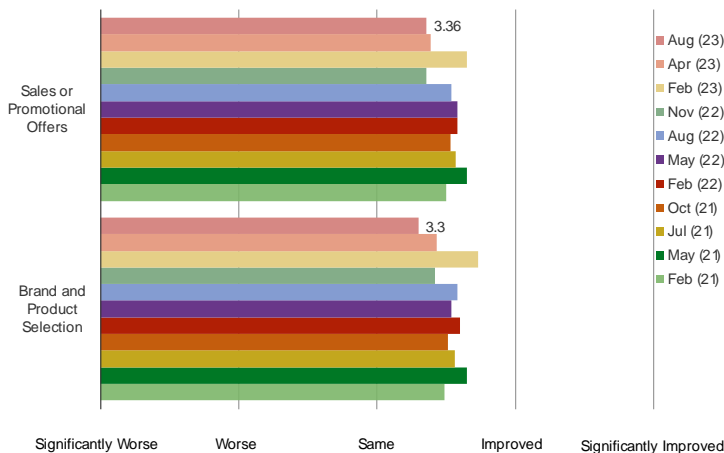
Kohl's



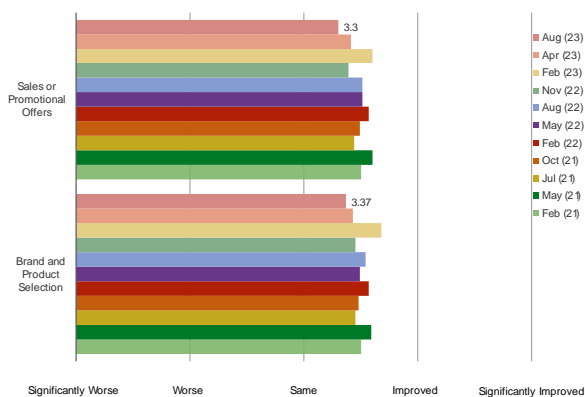
TJ Maxx



Burlington



Ross

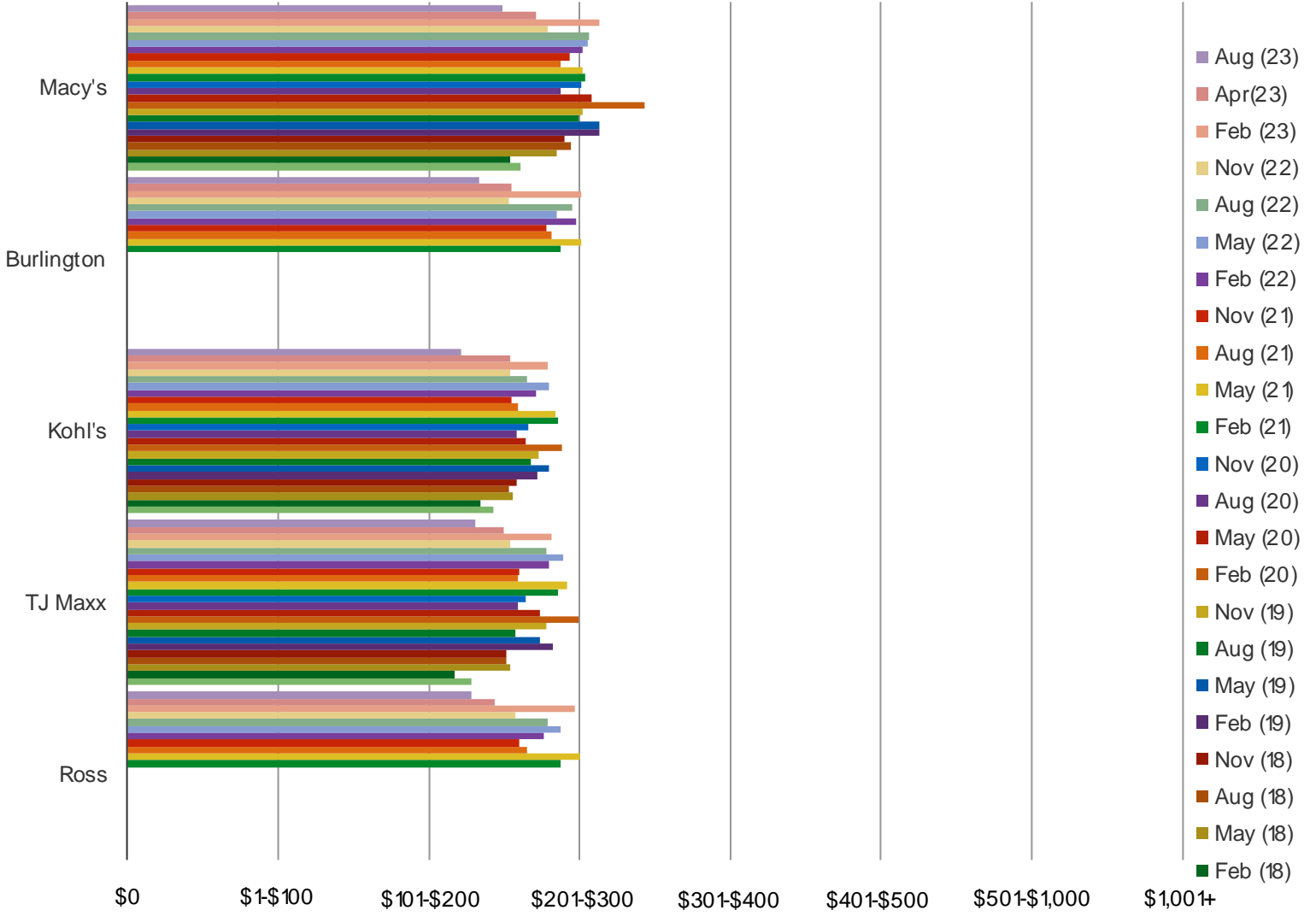


ENGAGEMENT DEEP DIVES

AMONG ACTIVE CUSTOMERS (PURCHASED IN THE PAST YEAR)

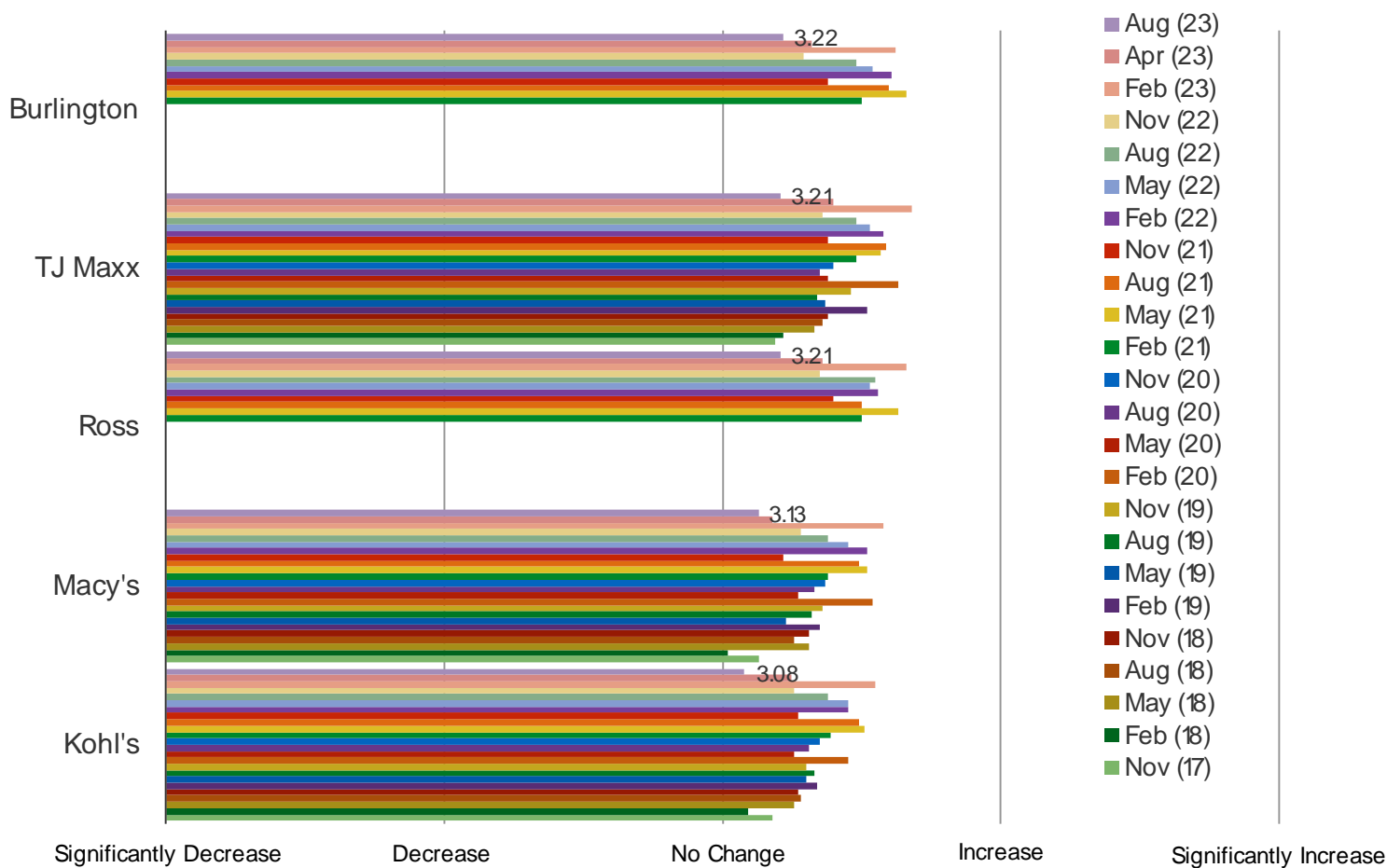
HOW MUCH HAVE YOU SPENT THROUGH _____ IN THE PAST SIX MONTHS?

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



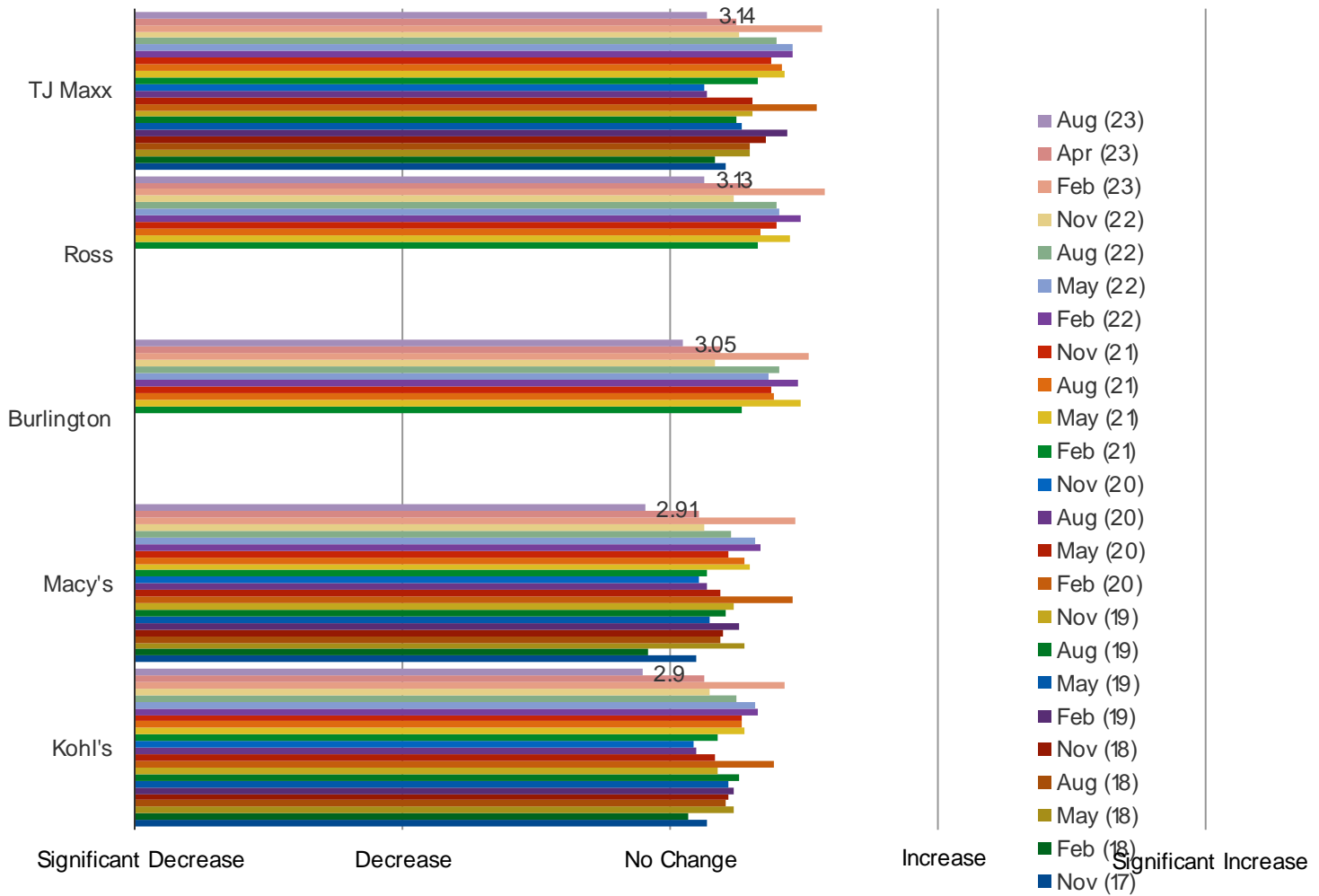
GOING FORWARD, DO YOU EXPECT TO CHANGE HOW MUCH YOU SHOP _____?

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

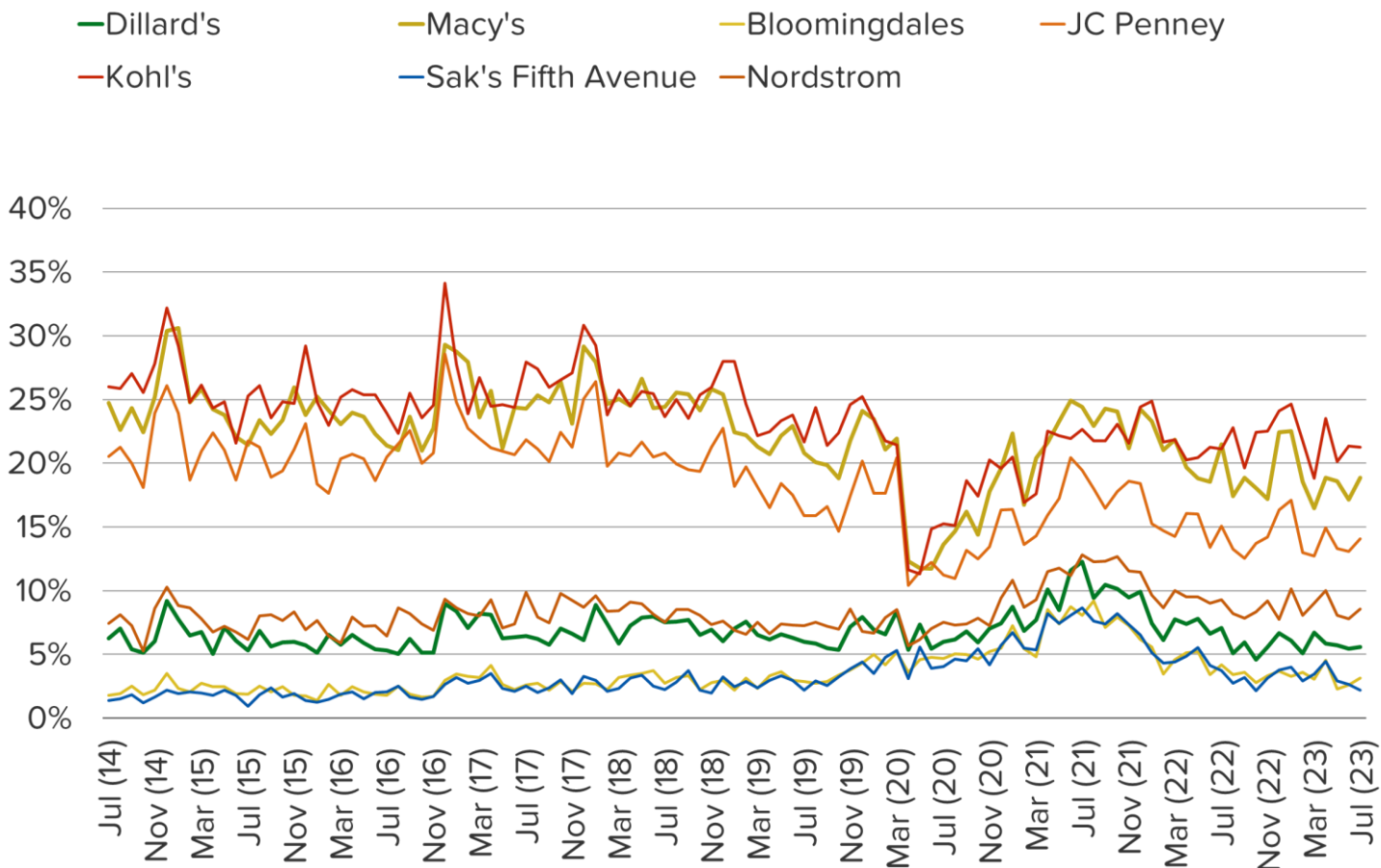
AMONG ALL RESPONDENTS, BALANCED TO US CENSUS

BESPOKE Surveys

Department Stores

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).



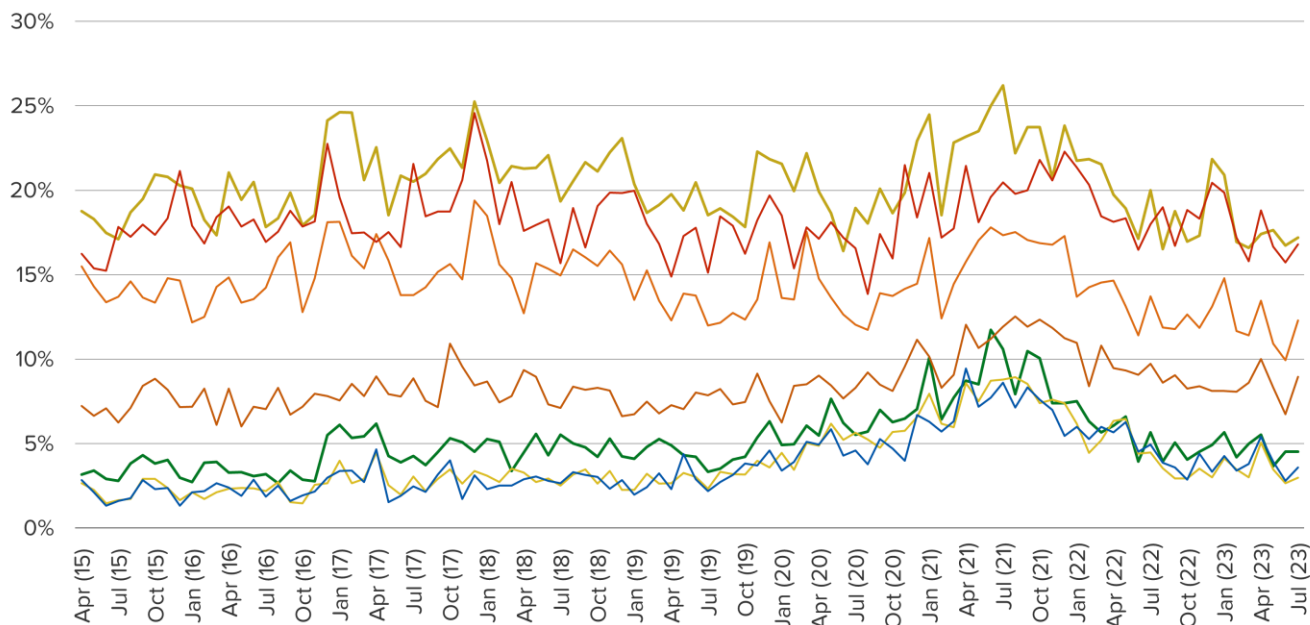
BESPOKE Surveys

Department Stores

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).

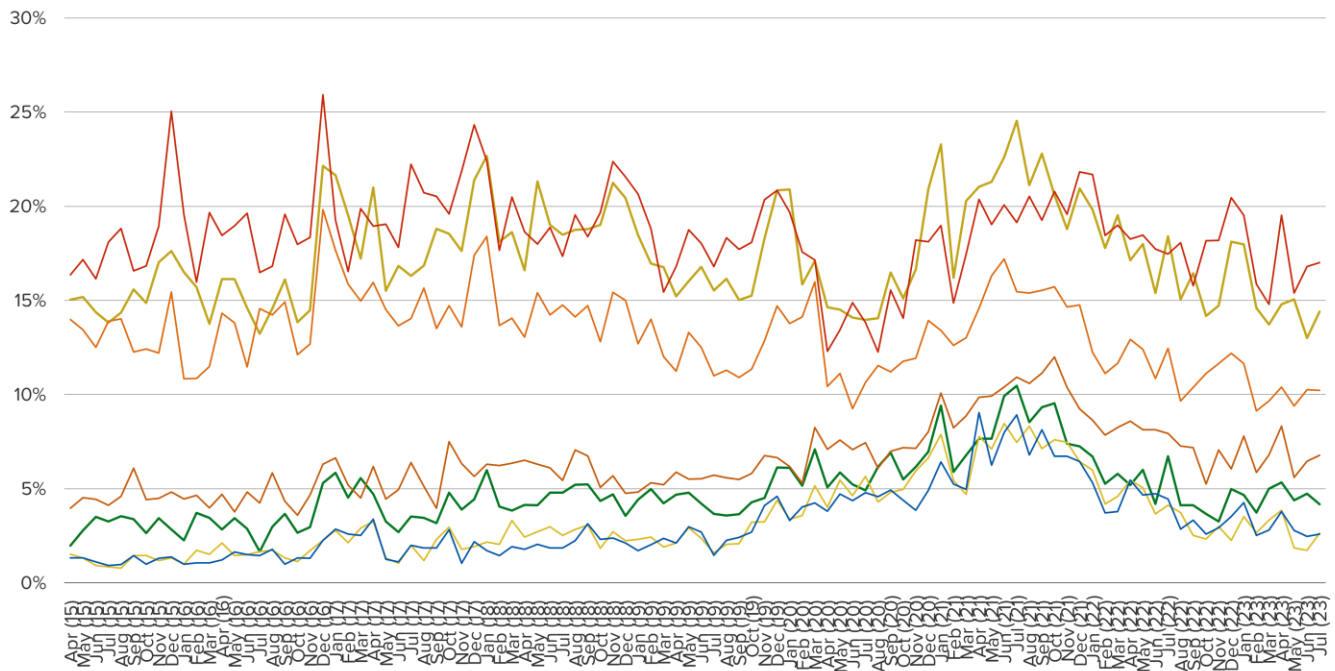
- Dillard's
- Macy's
- Bloomingdales
- JC Penney
- Kohl's
- Sak's Fifth Avenue



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

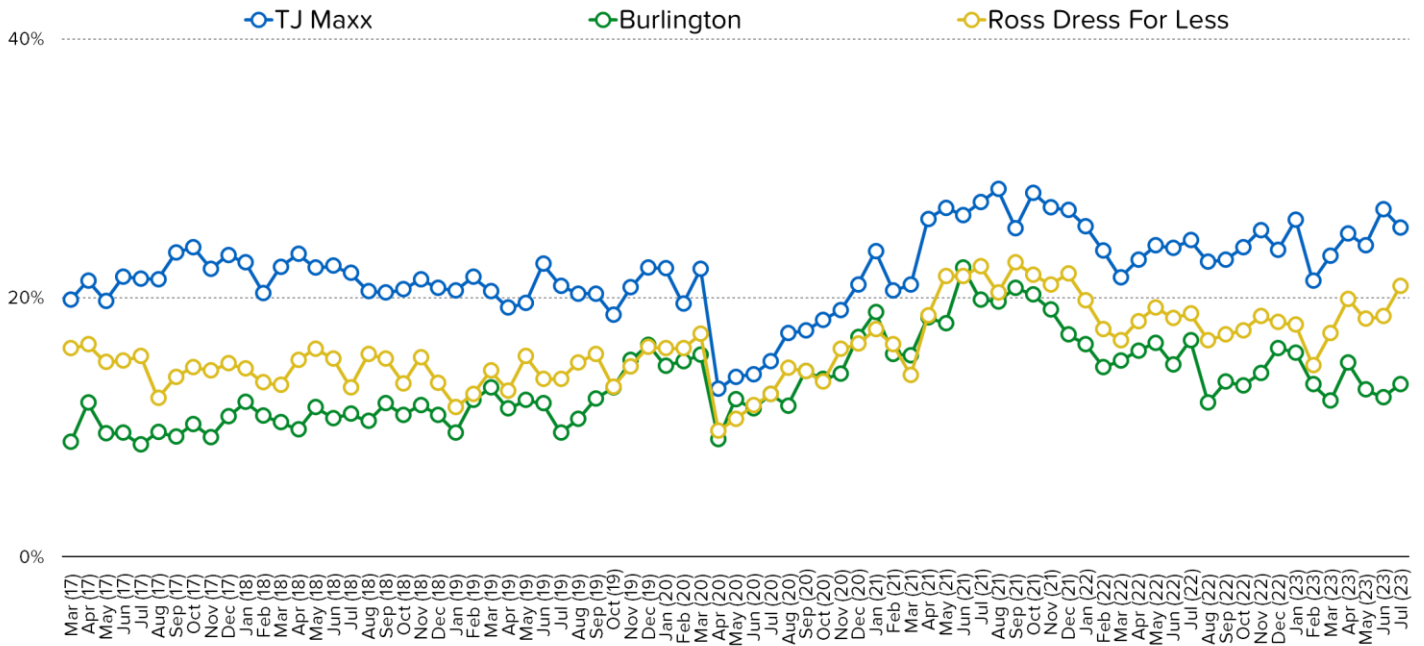
Posed to all respondents (1,500 US consumers balanced to census).

—Dillard's —Macy's —Bloomingdales —JC Penney —Kohl's —Sak's Fifth Avenue —Nordstrom



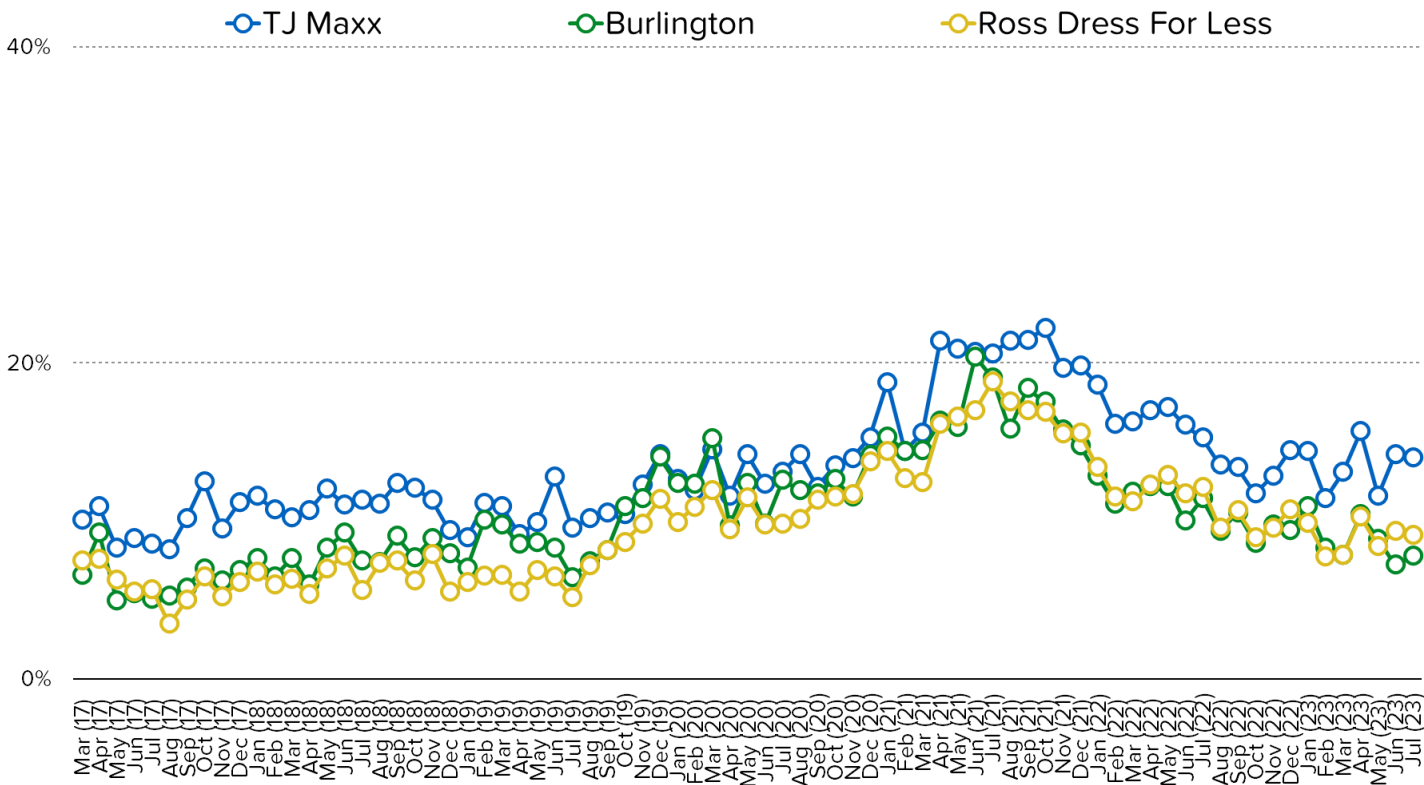
HAVE YOU VISITED ANY OF THE FOLLOWING STORE LOCATIONS IN THE PAST MONTH? (SELECT ALL THAT APPLY)

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



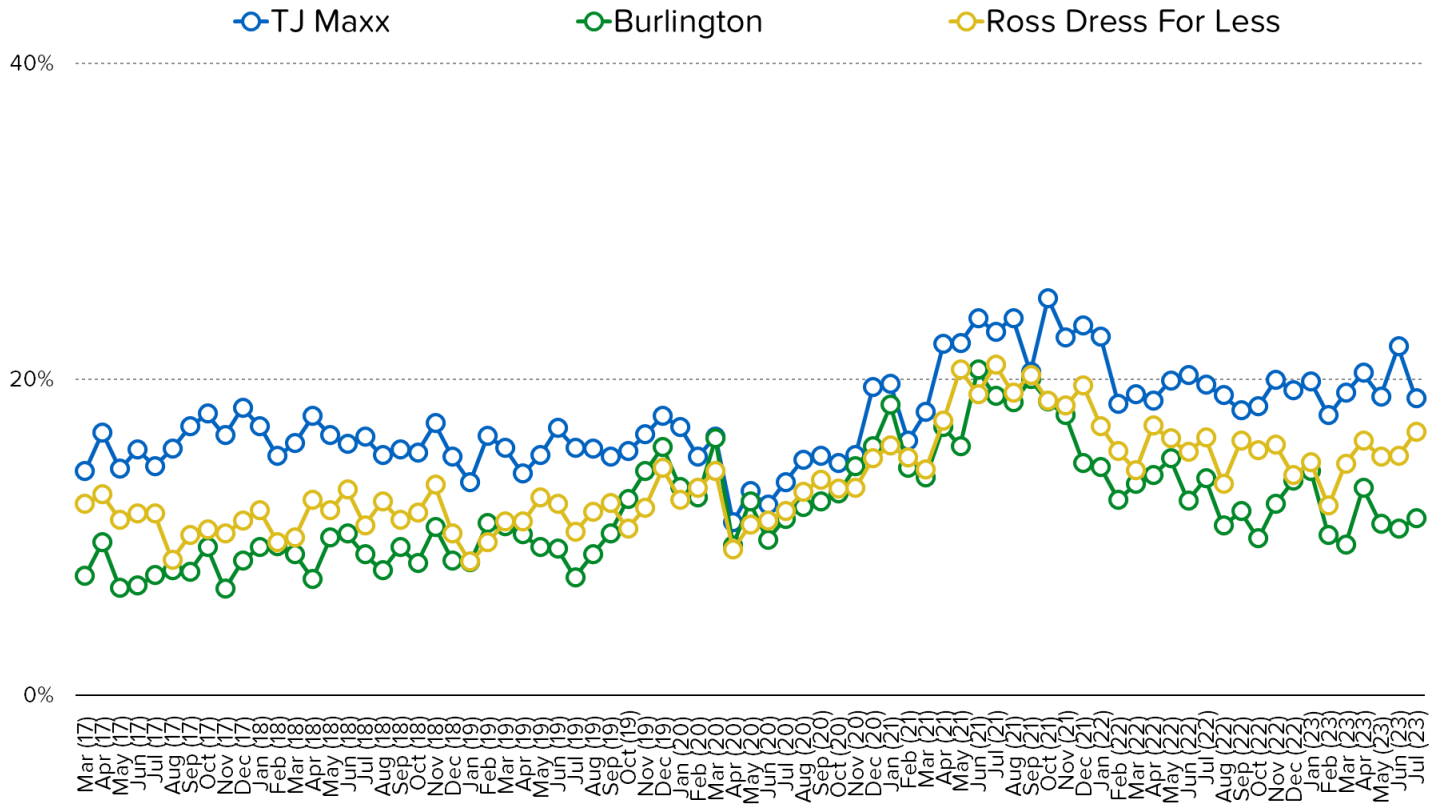
HAVE YOU VISITED ANY OF THE FOLLOWING COMPANY WEBSITES IN THE PAST MONTH? (SELECT ALL THAT APPLY)

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



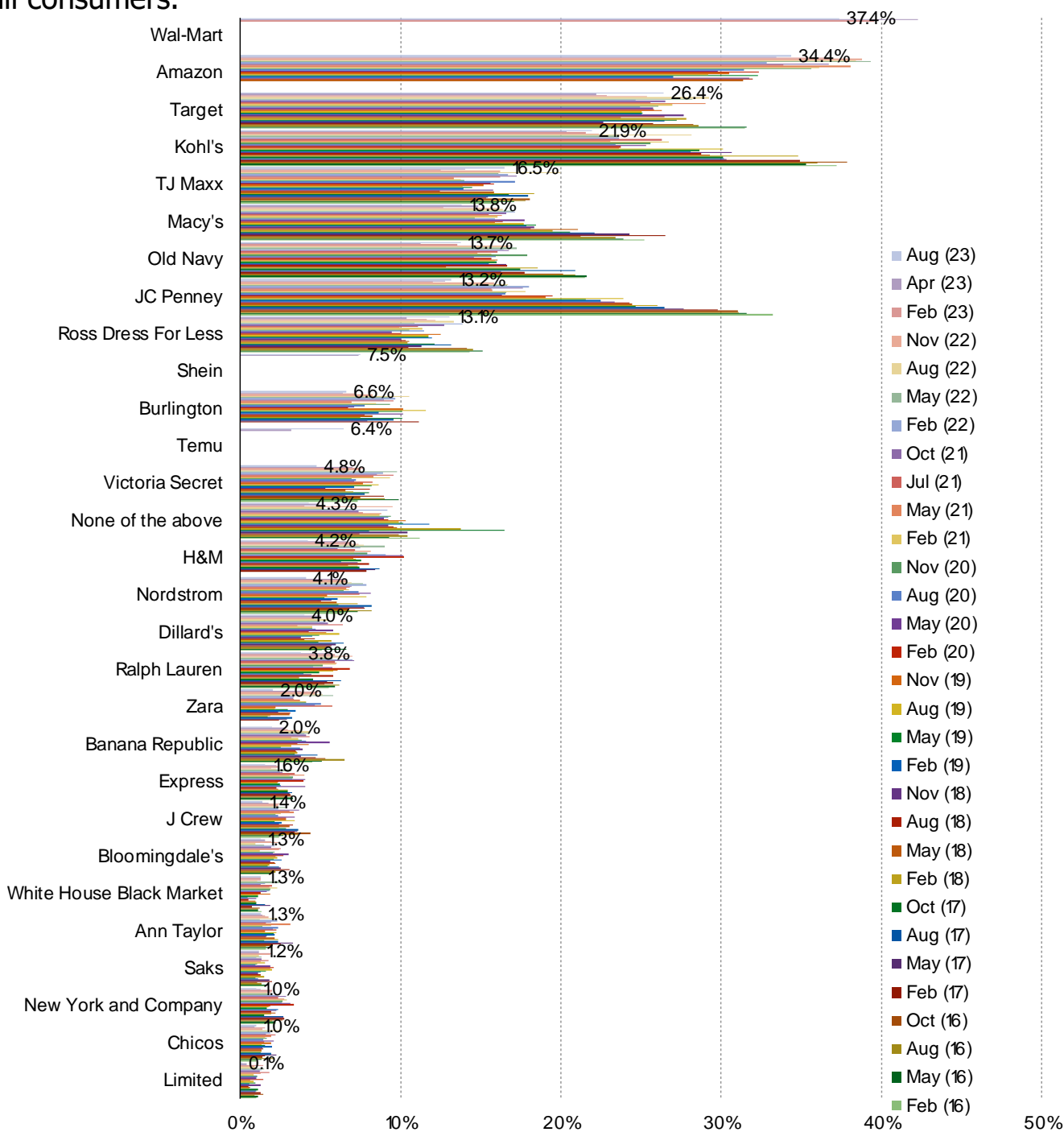
HAVE YOU PURCHASED FROM ANY OF THE FOLLOWING IN THE PAST MONTH (EITHER IN-STORES OR ONLINE)?

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



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

Posed to all consumers.

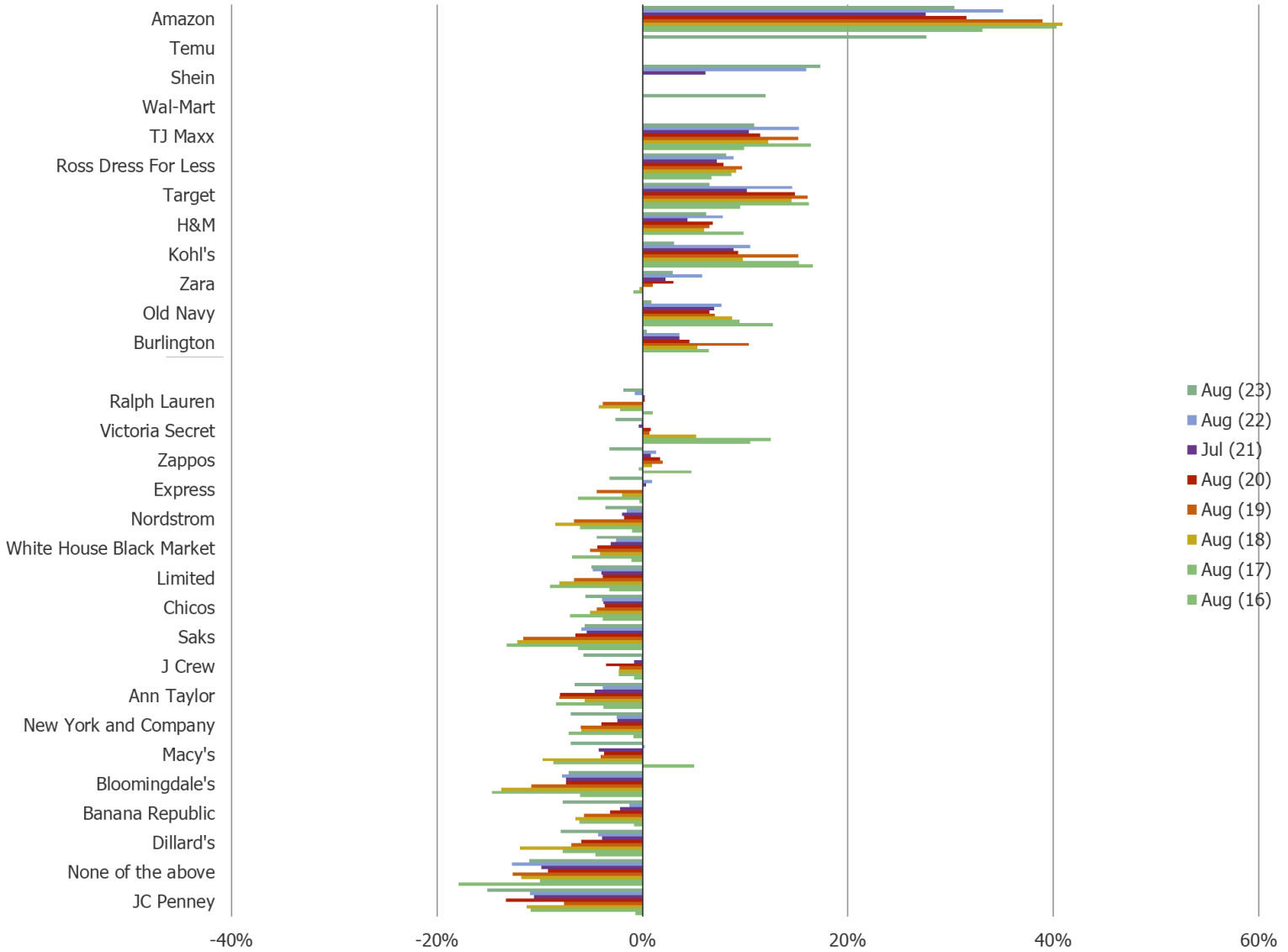


BESPOKE Surveys

Department Stores

NET POPULARITY CHANGE - % SAID RETAILER/BRAND IS GAINING POPULARITY MINUS % SAID RETAILER/BRAND IS LOSING POPULARITY

Posed to all consumers.

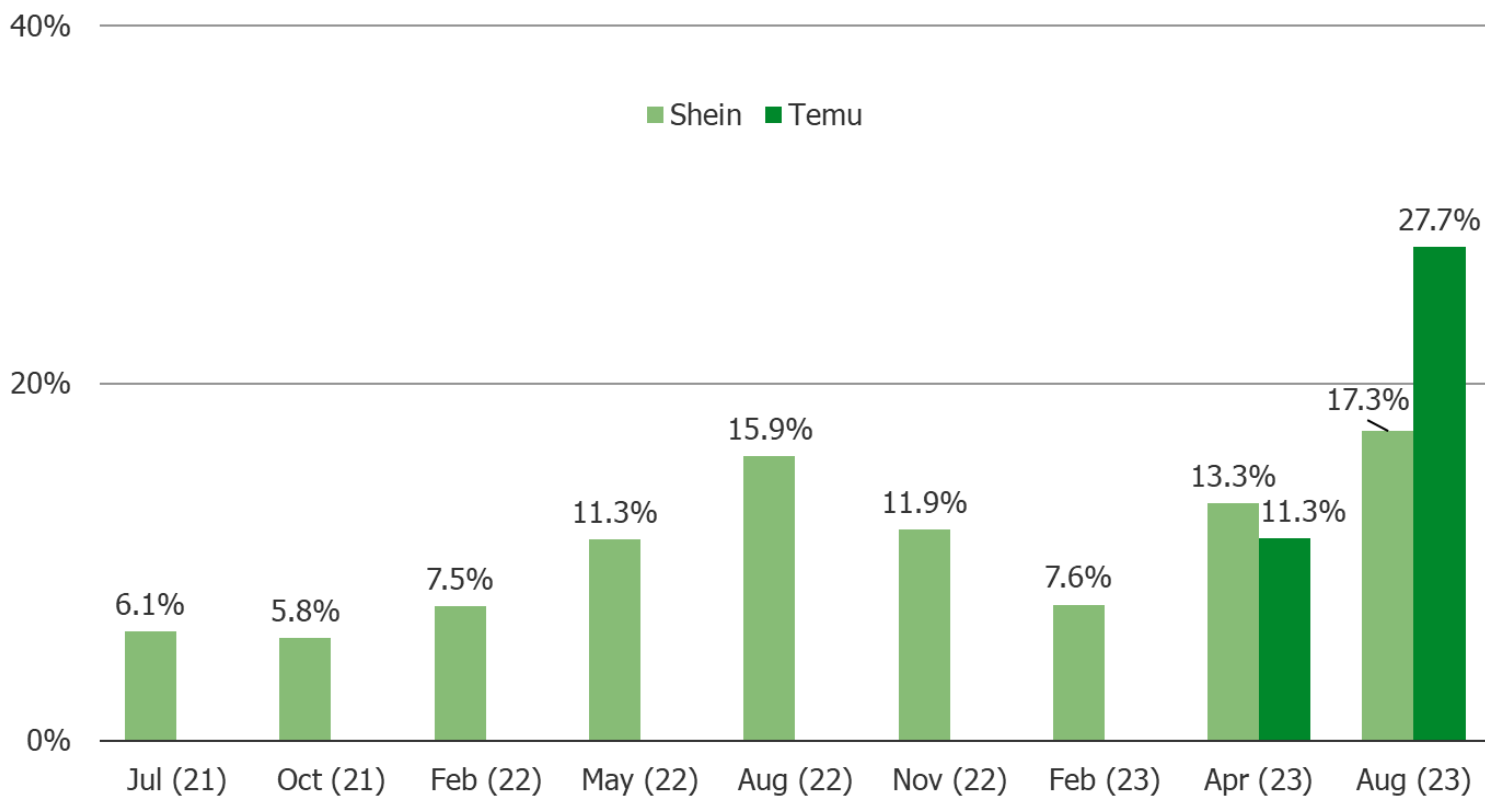


BESPOKE Surveys

Department Stores

NET POPULARITY CHANGE - % SAID RETAILER/BRAND IS GAINING POPULARITY MINUS % SAID RETAILER/BRAND IS LOSING POPULARITY

Posed to all consumers (Temu and Shein, recent quarters sequentially).

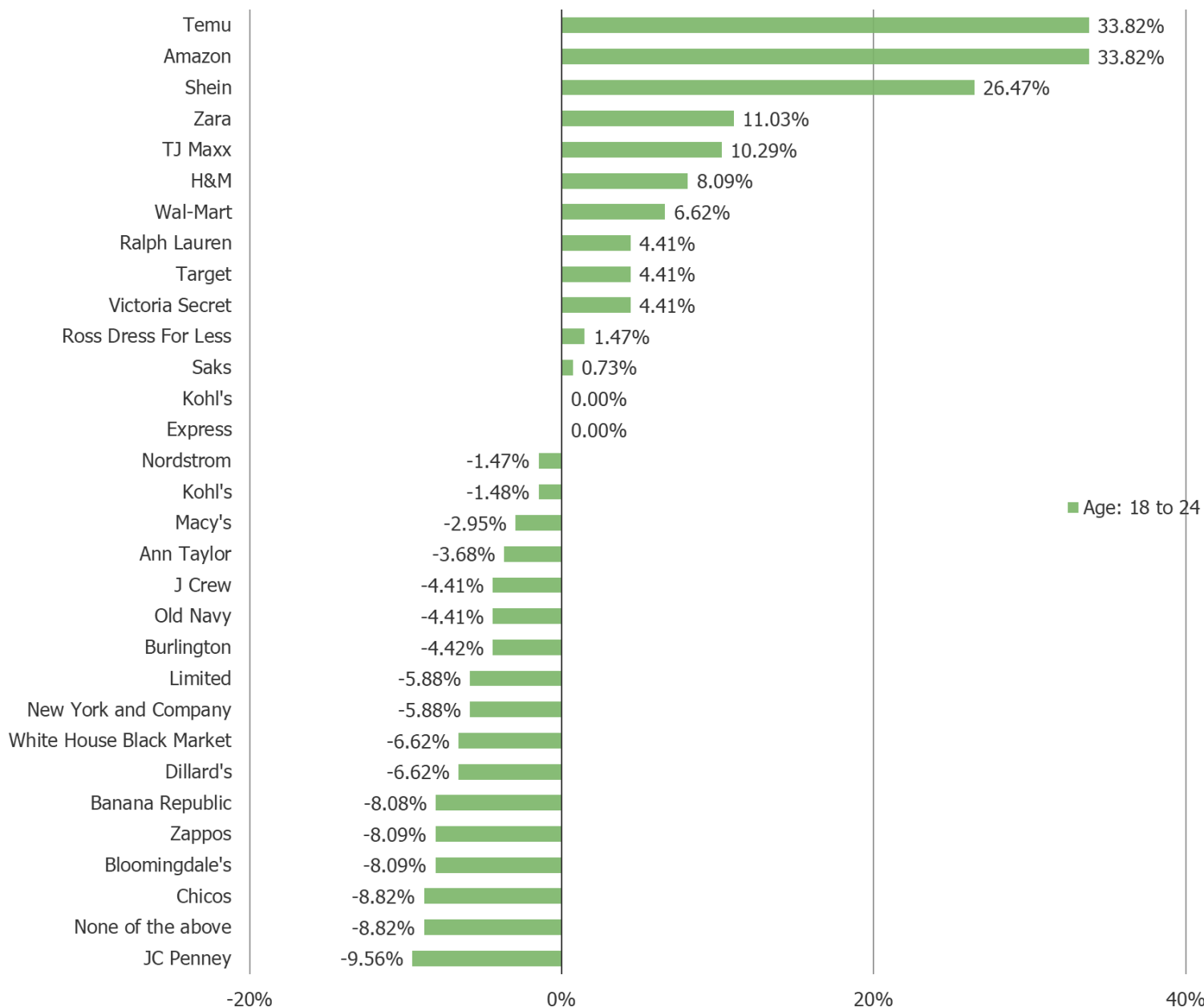


BESPOKE Surveys

Department Stores

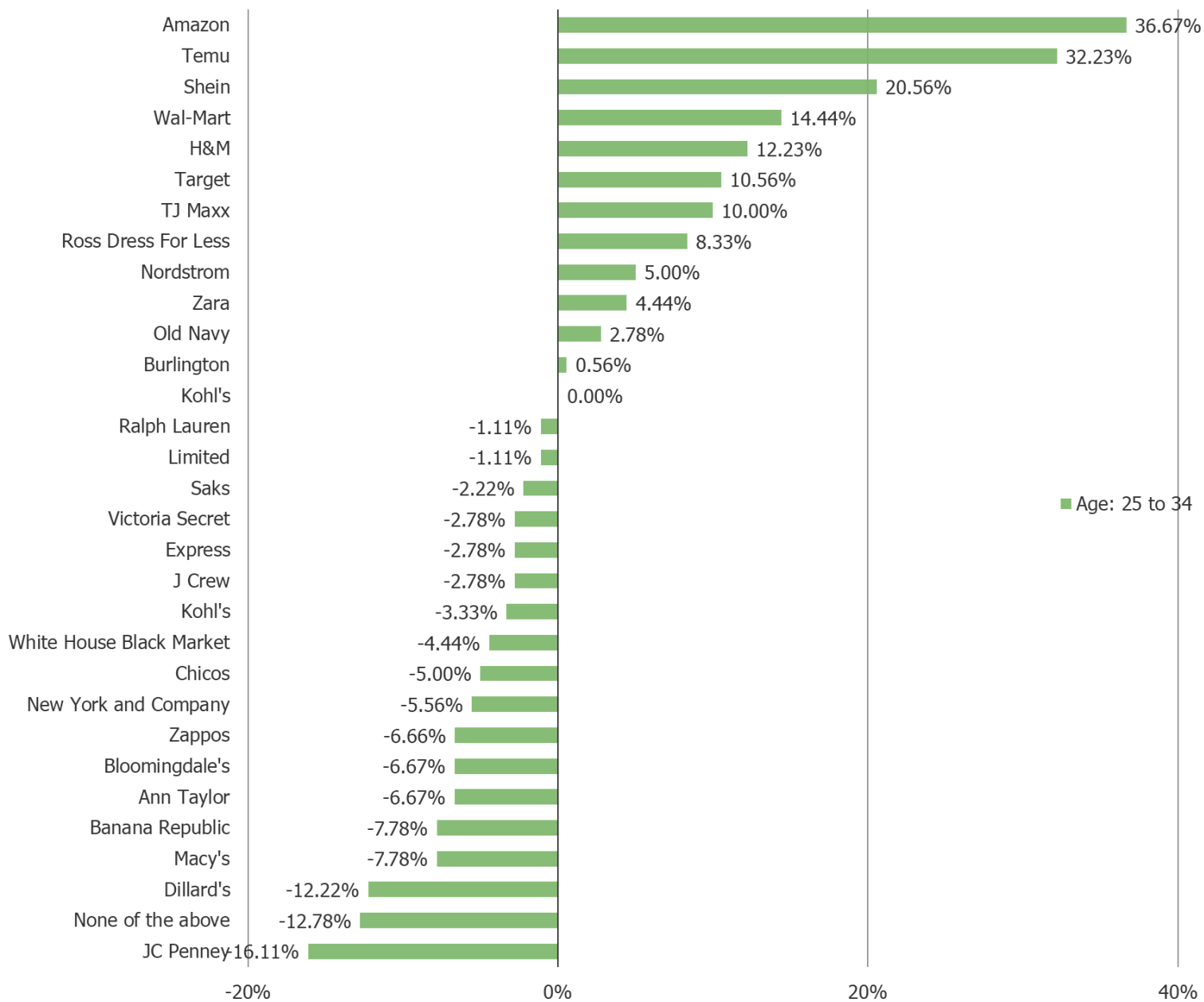
NET POPULARITY CHANGE - % SAID RETAILER/BRAND IS GAINING POPULARITY MINUS % SAID RETAILER/BRAND IS LOSING POPULARITY

Posed to all consumers, focusing on **18-24 year-olds...**



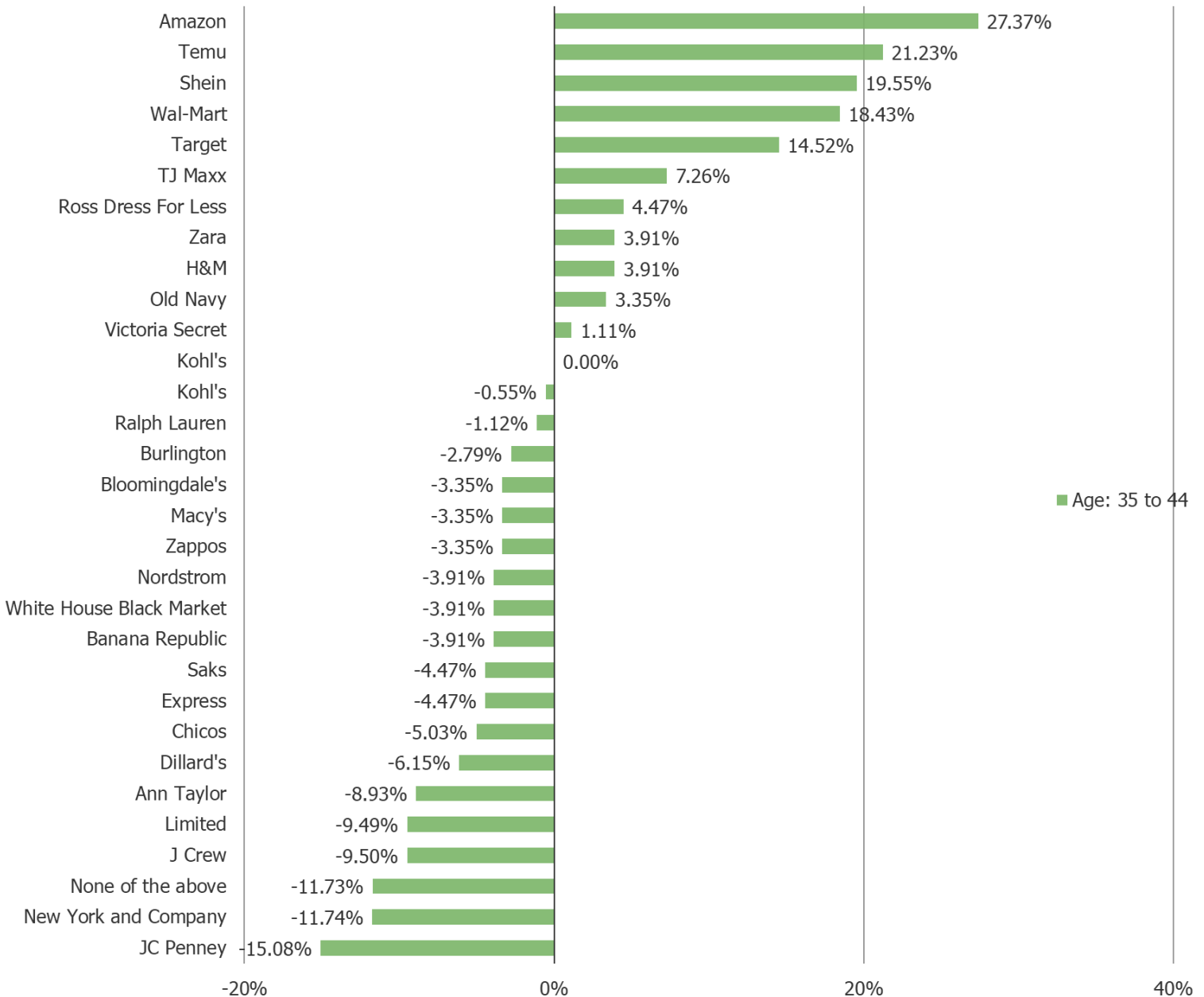
NET POPULARITY CHANGE - % SAID RETAILER/BRAND IS GAINING POPULARITY MINUS % SAID RETAILER/BRAND IS LOSING POPULARITY

Posed to all consumers, focusing on 25-34 year-olds...



NET POPULARITY CHANGE - % SAID RETAILER/BRAND IS GAINING POPULARITY MINUS % SAID RETAILER/BRAND IS LOSING POPULARITY

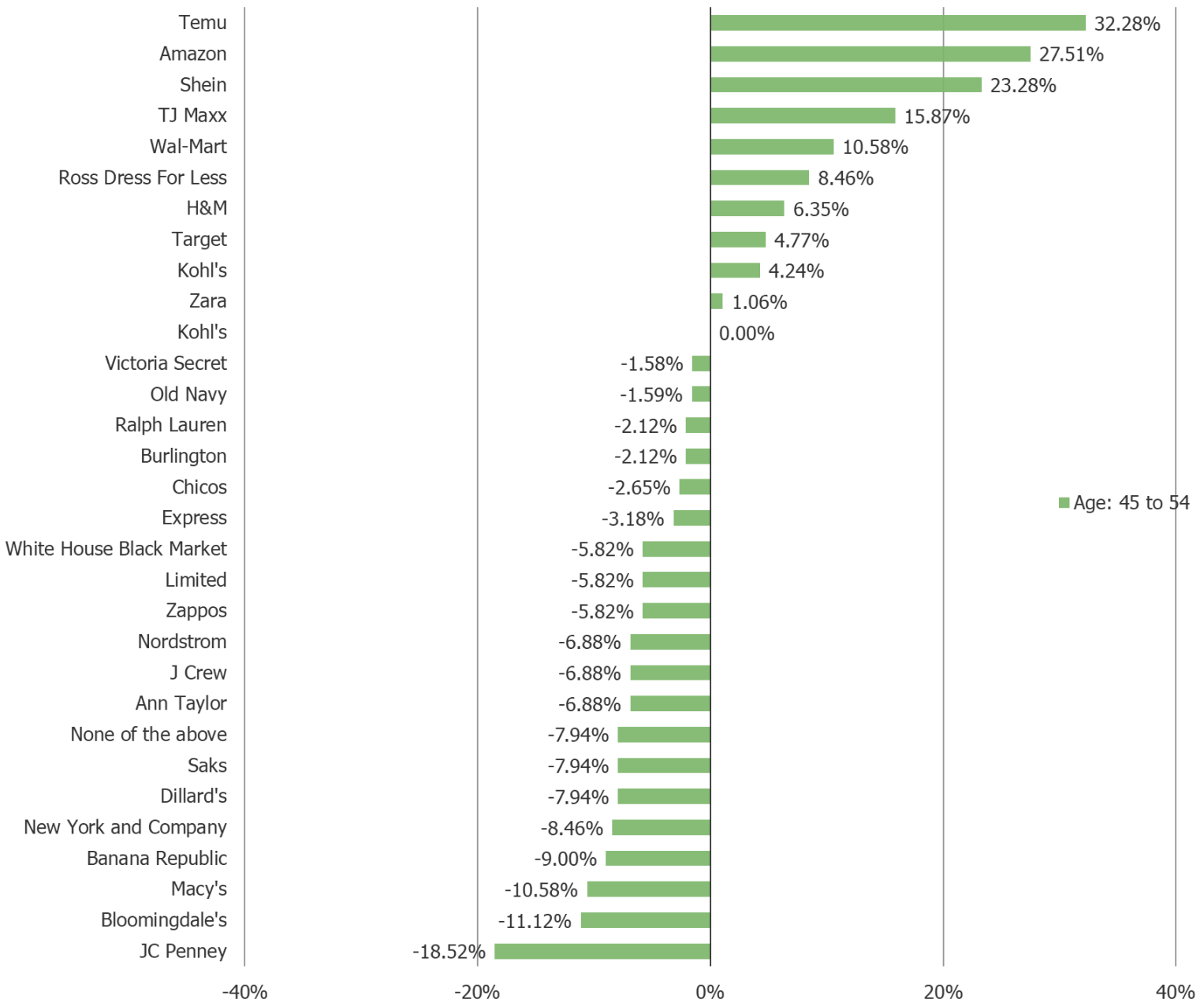
Posed to all consumers, focusing on 35-44 year-olds...



Department Stores

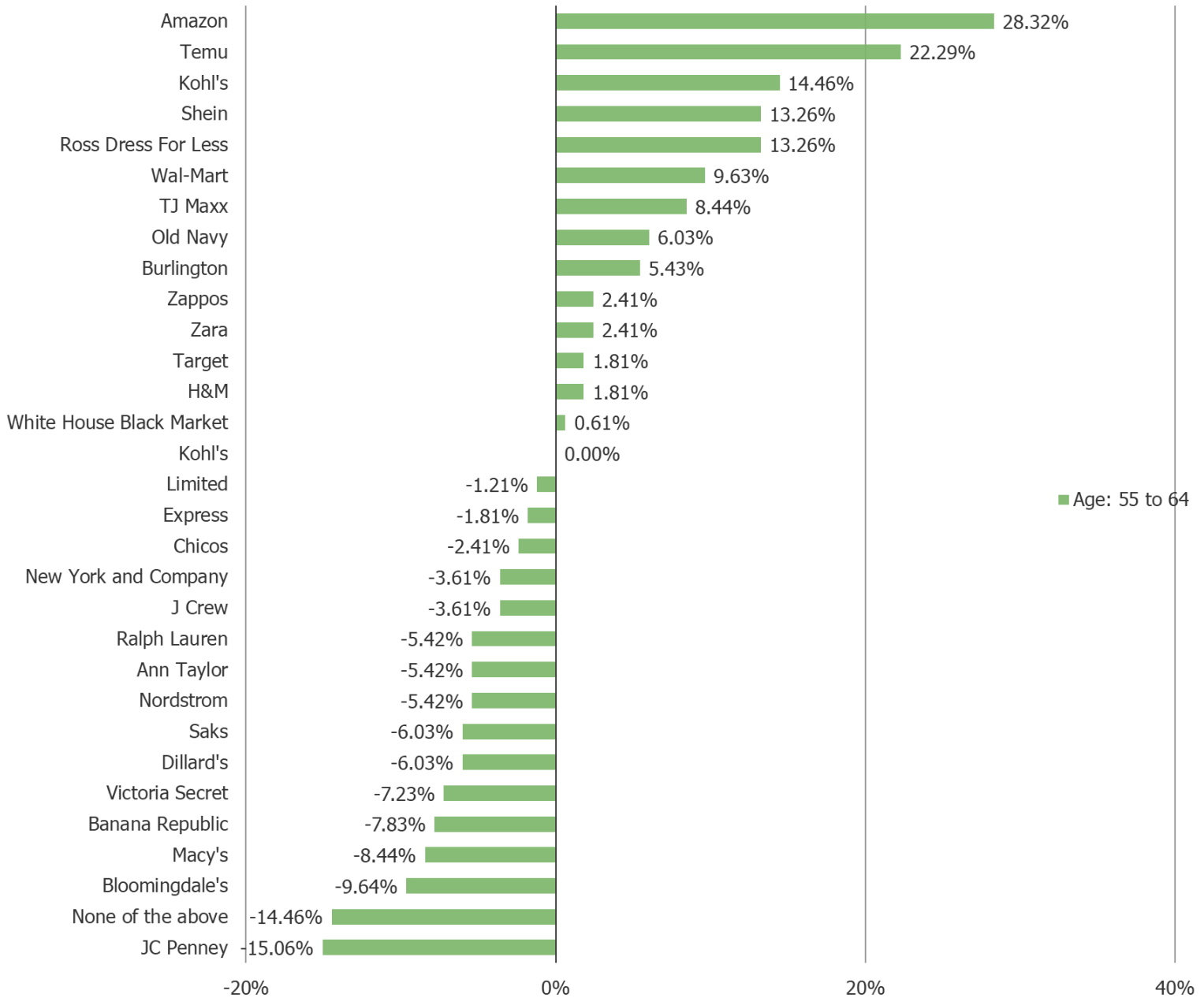
NET POPULARITY CHANGE - % SAID RETAILER/BRAND IS GAINING POPULARITY MINUS % SAID RETAILER/BRAND IS LOSING POPULARITY

Posed to all consumers, focusing on 45-54 year-olds...



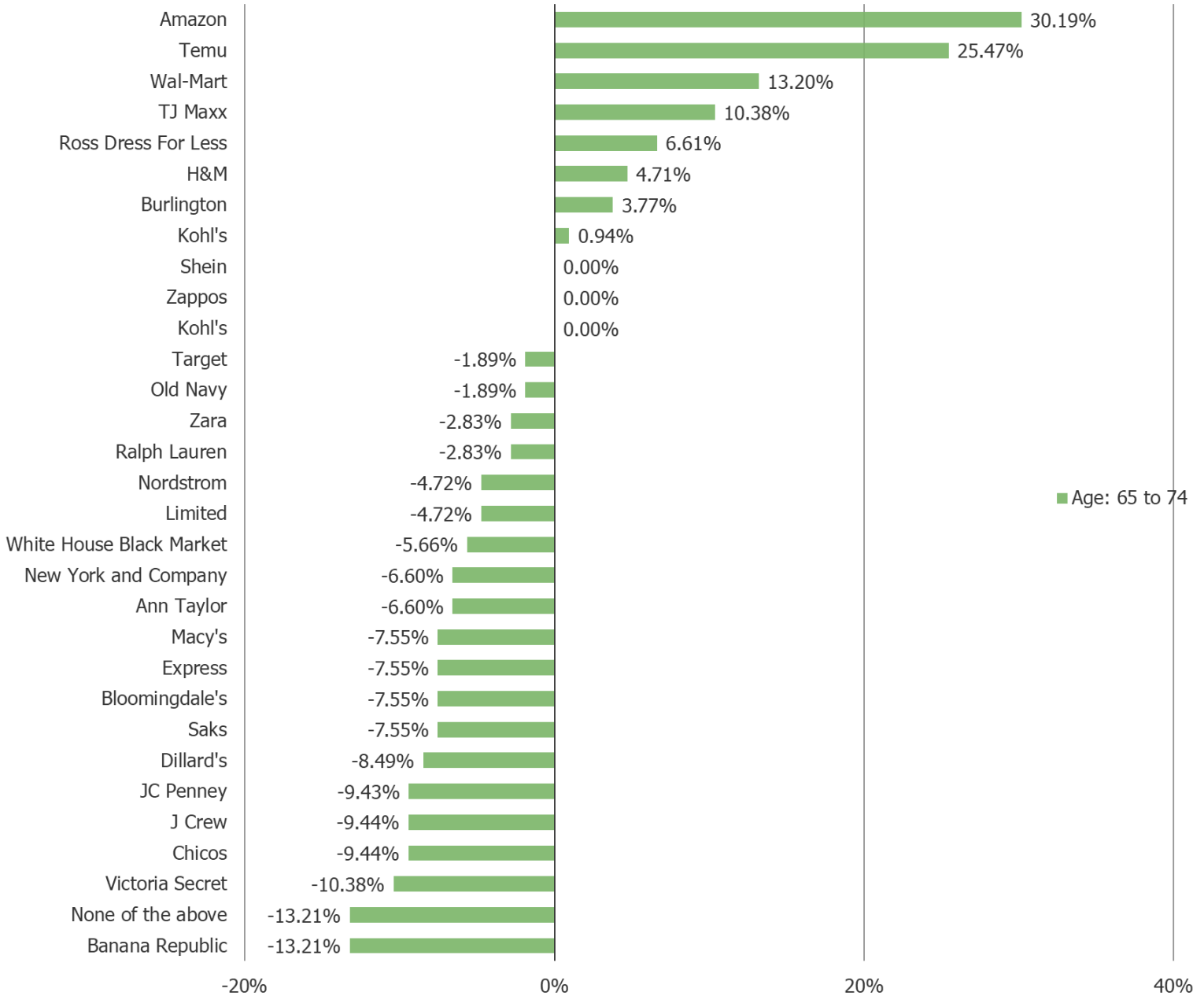
NET POPULARITY CHANGE - % SAID RETAILER/BRAND IS GAINING POPULARITY MINUS % SAID RETAILER/BRAND IS LOSING POPULARITY

Posed to all consumers, focusing on 55-64 year-olds...



NET POPULARITY CHANGE - % SAID RETAILER/BRAND IS GAINING POPULARITY MINUS % SAID RETAILER/BRAND IS LOSING POPULARITY

Posed to all consumers, focusing on 65-74 year-olds...

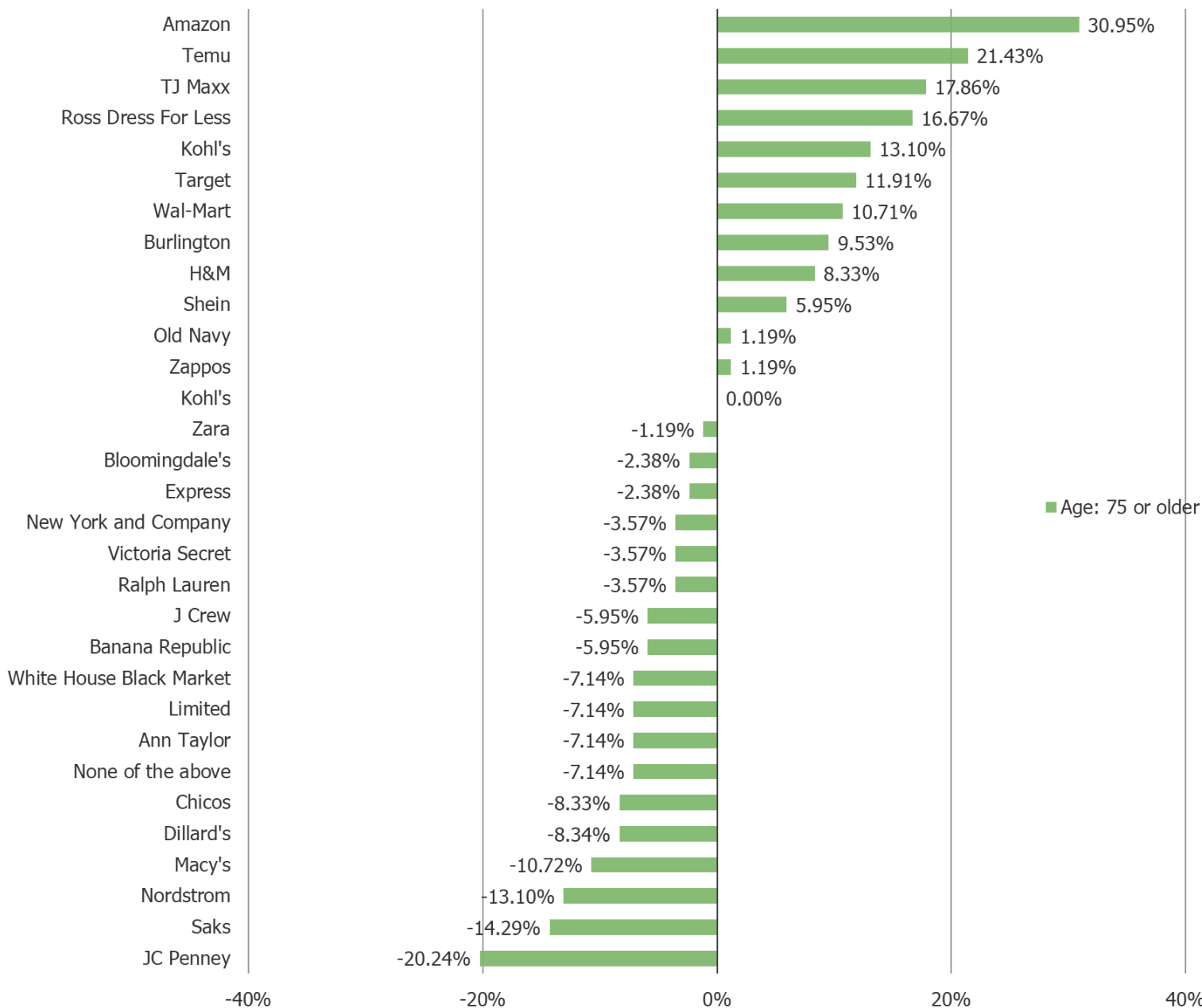


BESPOKE Surveys

Department Stores

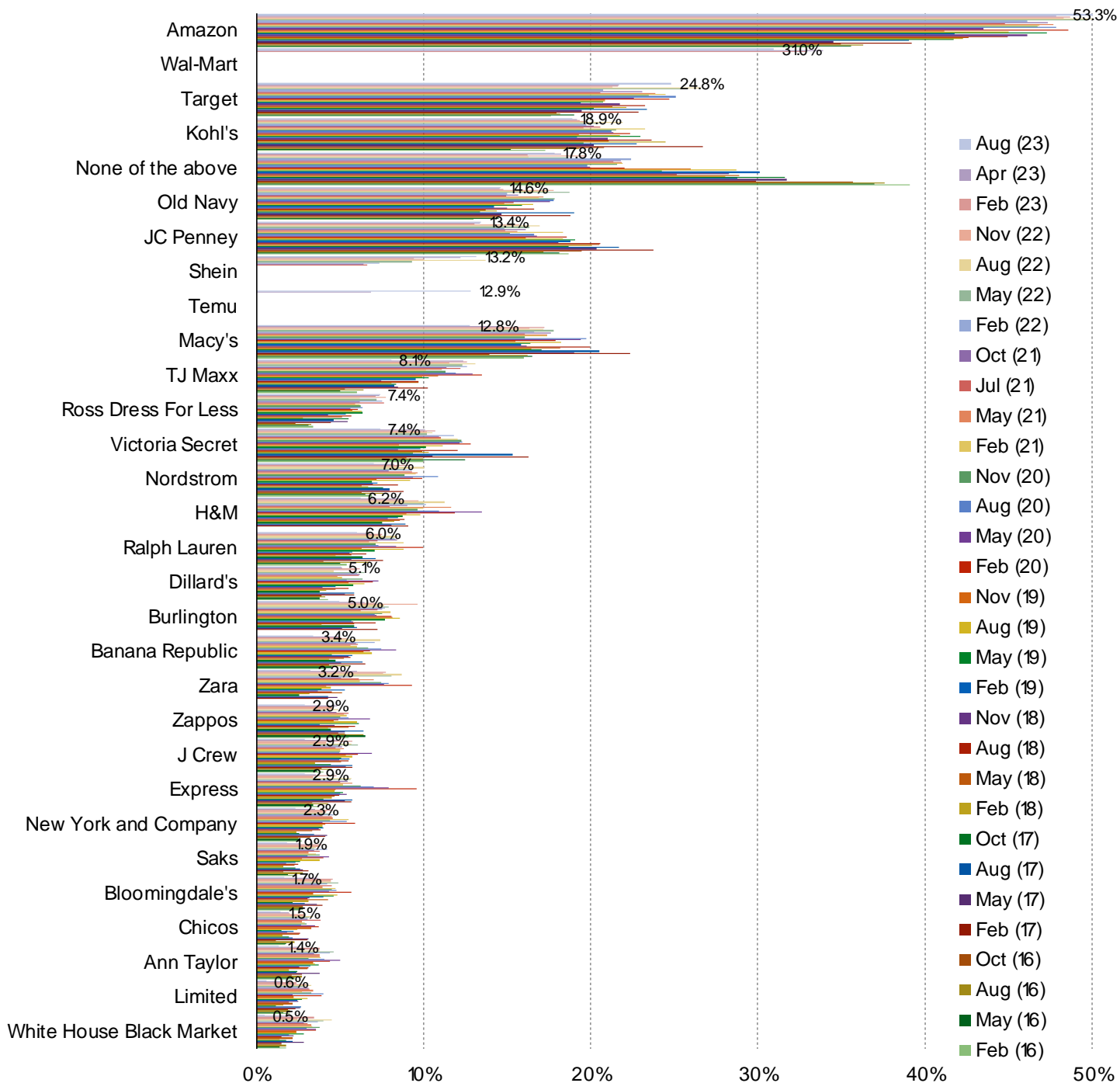
NET POPULARITY CHANGE - % SAID RETAILER/BRAND IS GAINING POPULARITY MINUS % SAID RETAILER/BRAND IS LOSING POPULARITY

Posed to all consumers, focusing on **75+ year-olds**...



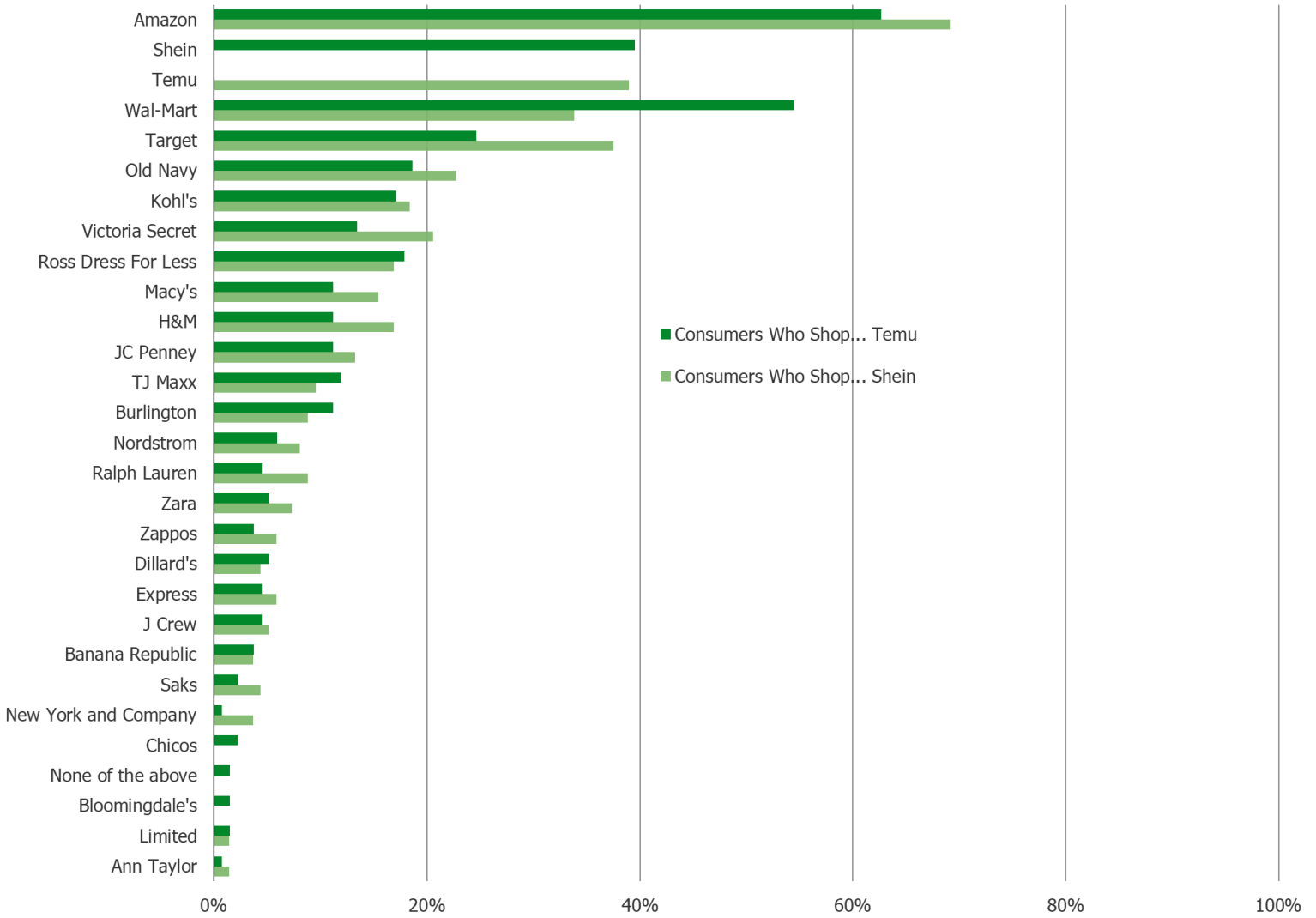
I SHOP FOR CLOTHES OR ACCESSORIES FOR MYSELF ONLINE AT THE FOLLOWING...

Posed to all consumers.



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

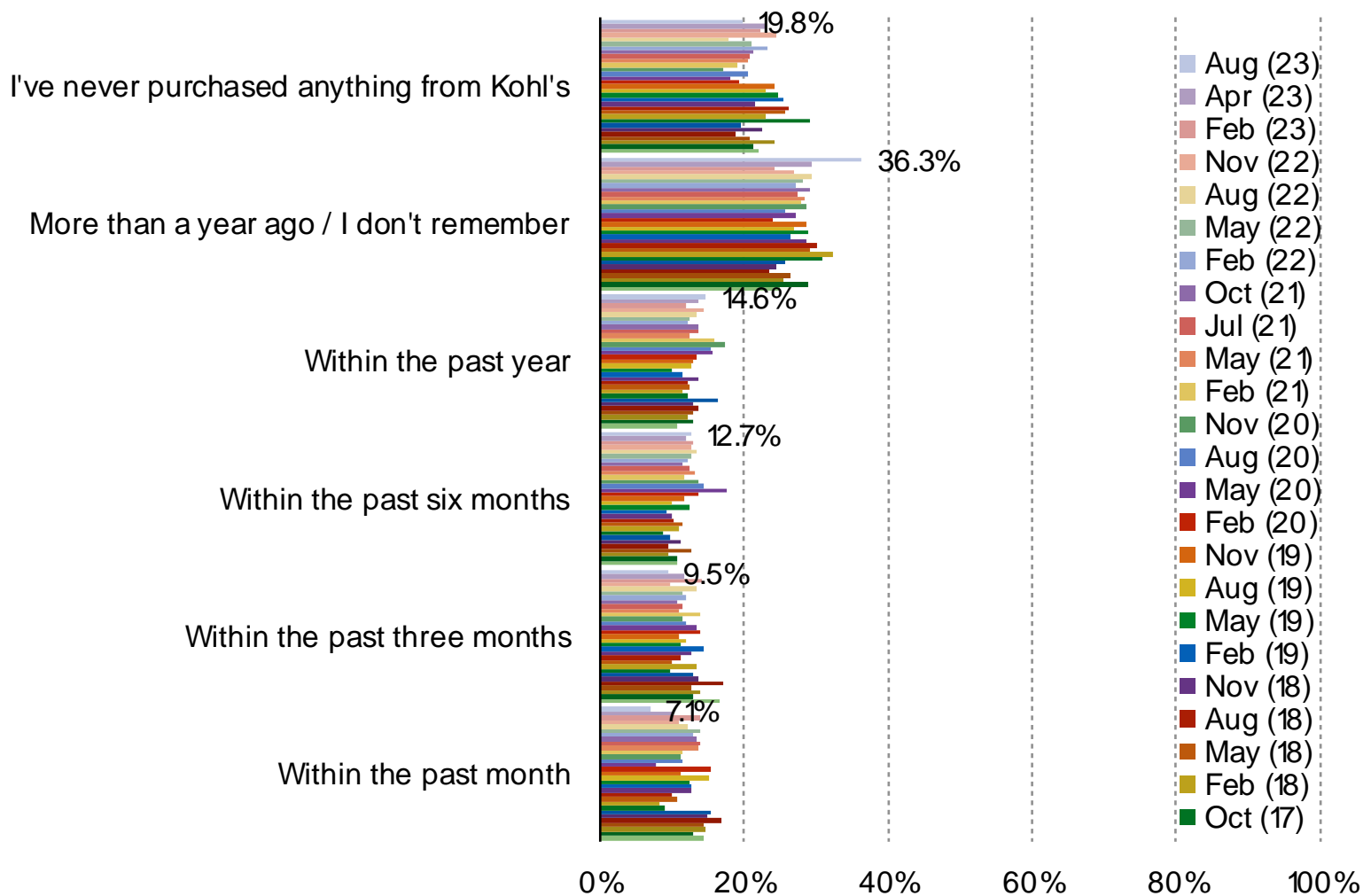
Focusing on Temu and Shein customers...



DEPARTMENT STORE DEEP DIVES: KOHL'S

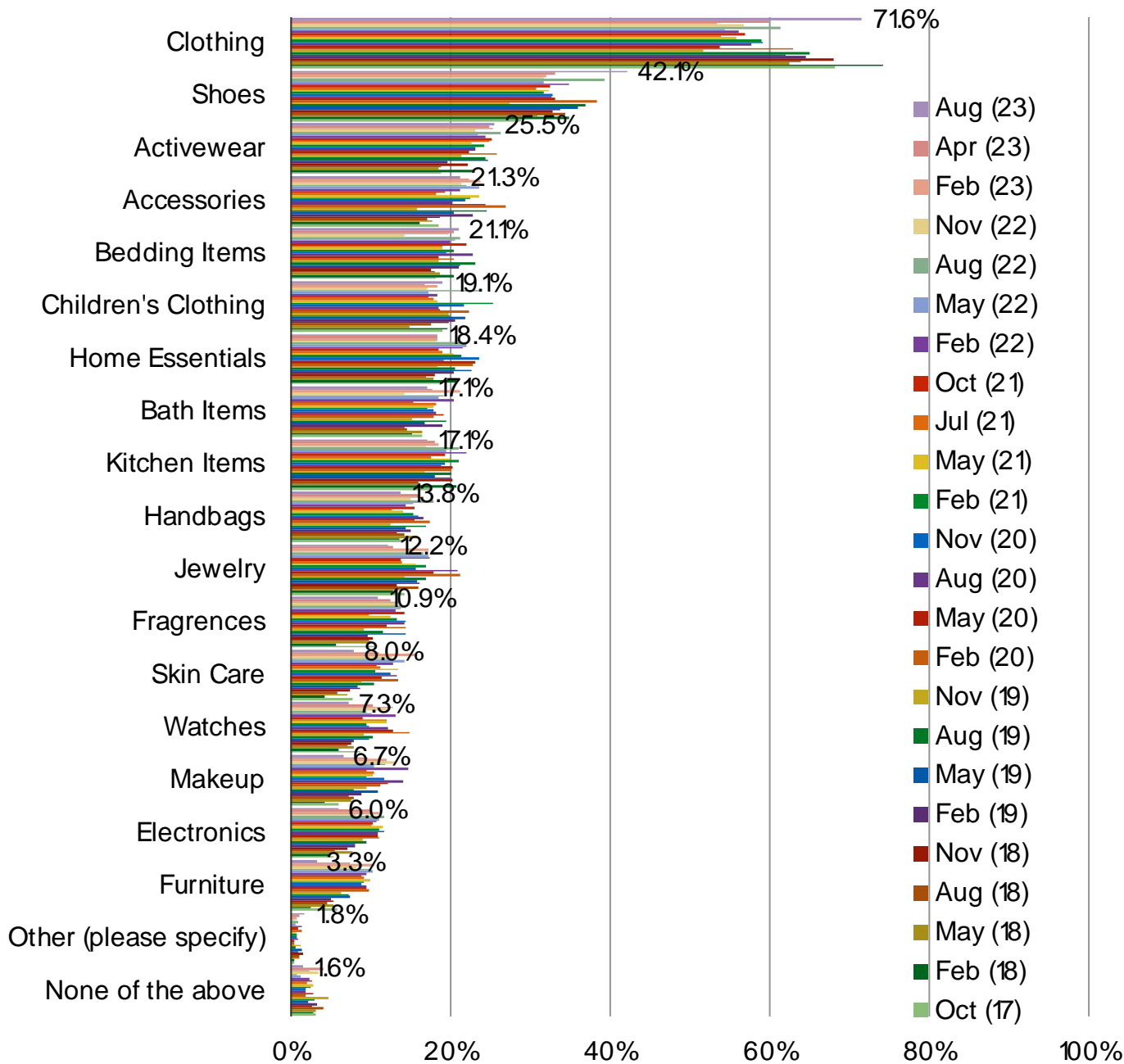
WHEN IS THE LAST TIME YOU PURCHASED SOMETHING FROM KOHL'S?

Posed to all consumers.



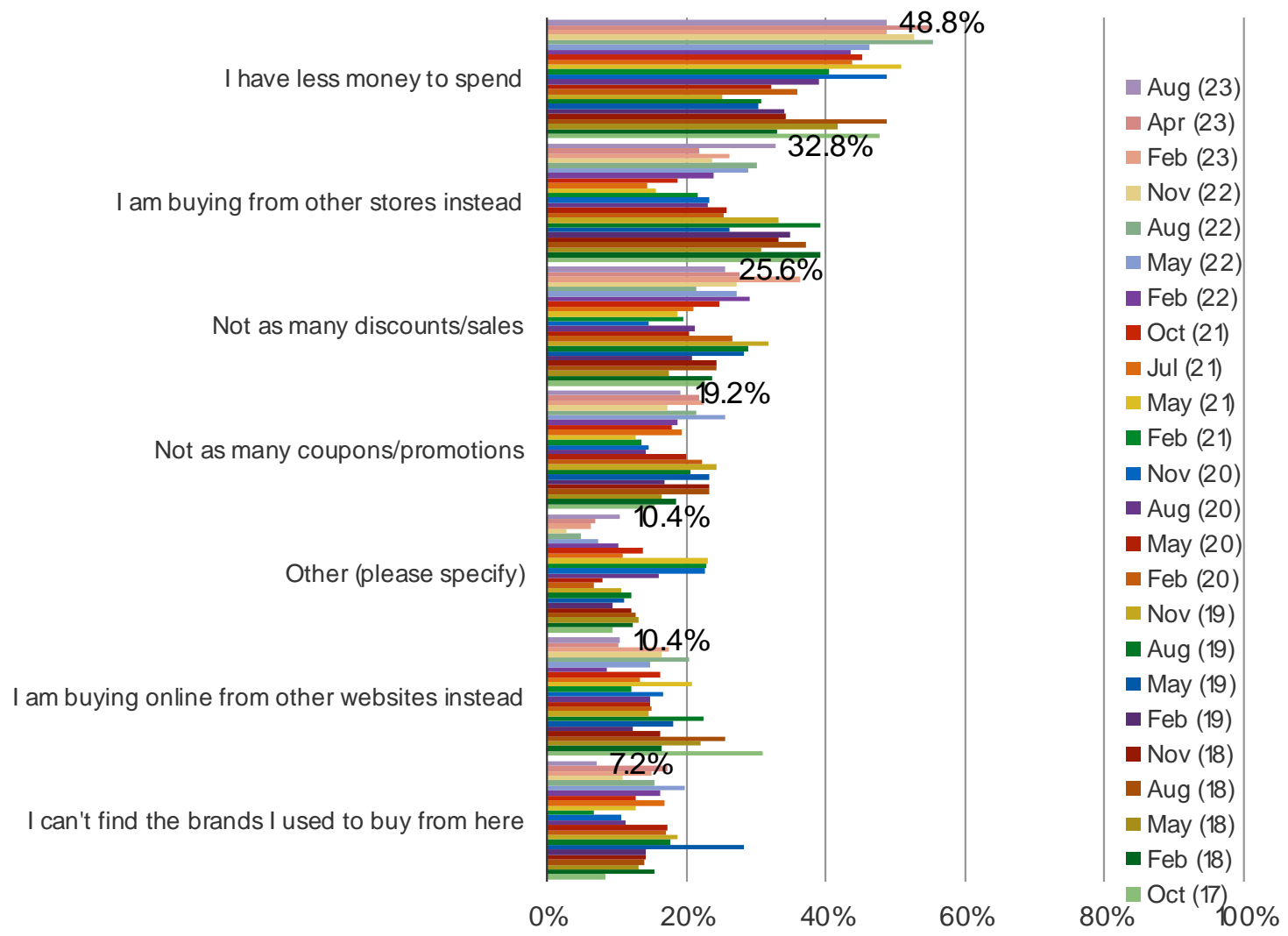
WHAT TYPE OF ITEMS DO YOU TYPICALLY BUY FROM KOHL'S?

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



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

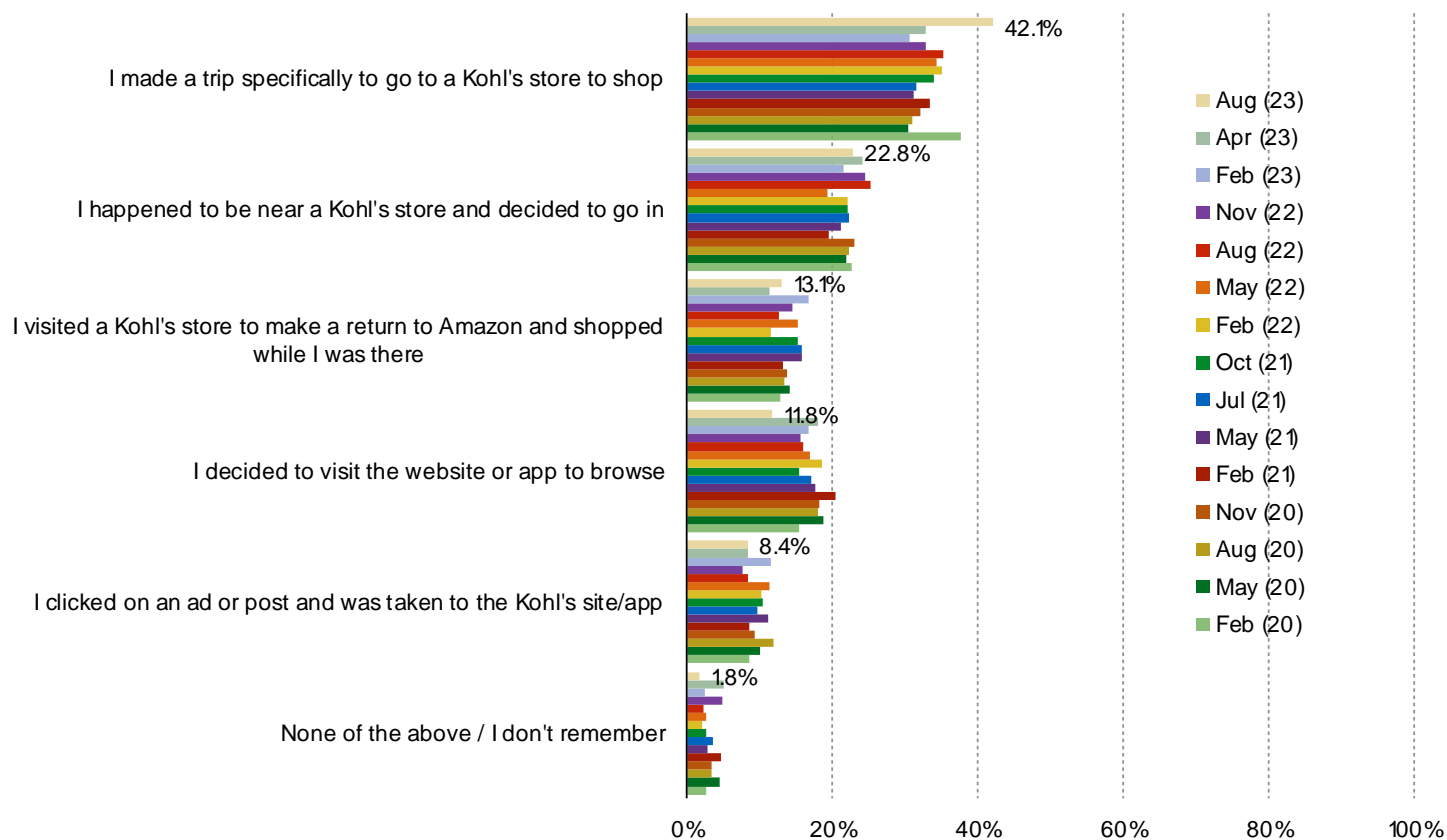
Posed to all consumers who purchased from Kohl's in the past year, but said they are shopping it less compared to a year ago.



KOHL'S AND AMAZON RETURNS

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

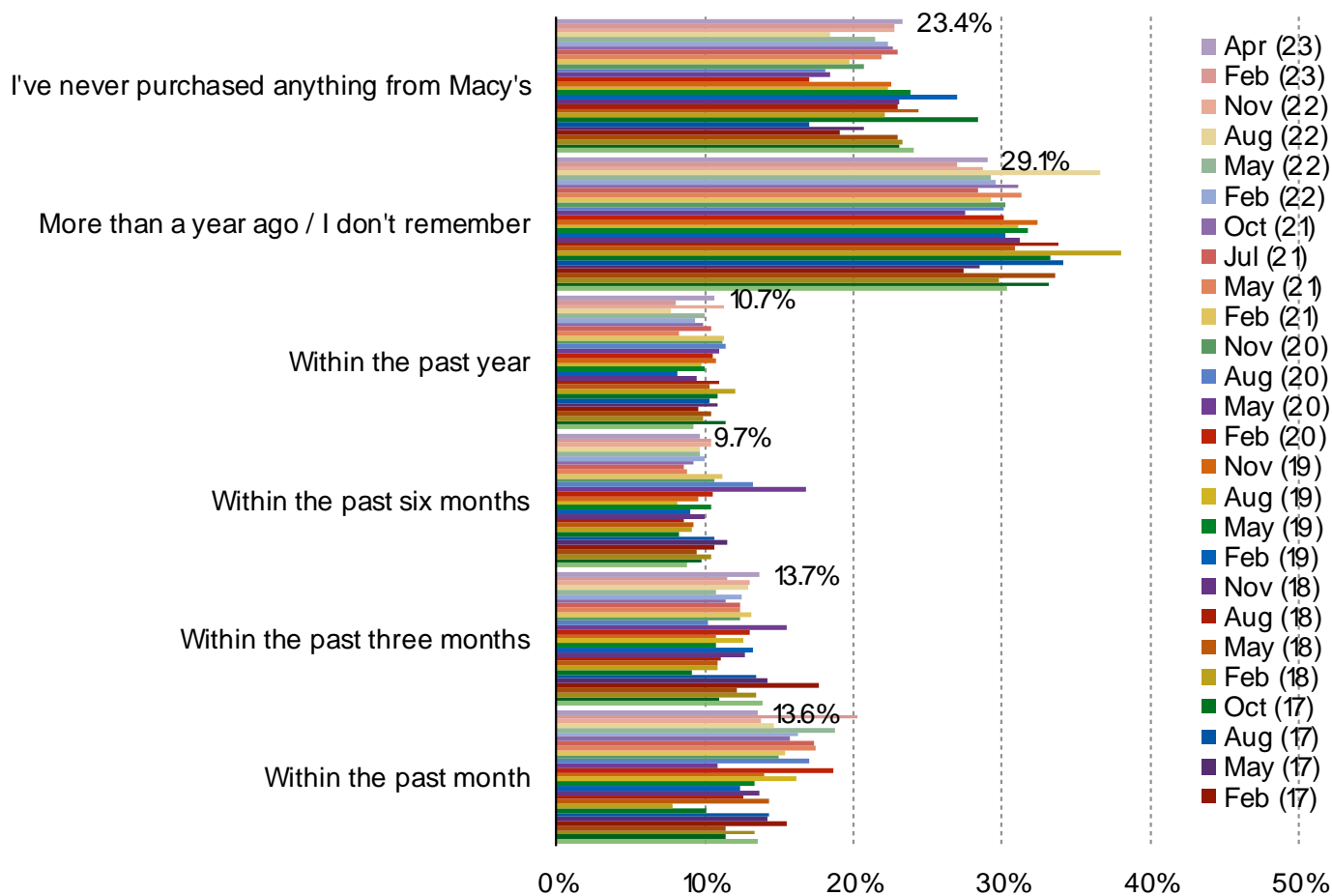
Posed respondents who shopped Kohl's in the past three months



DEPARTMENT STORES DEEP DIVE: MACY'S

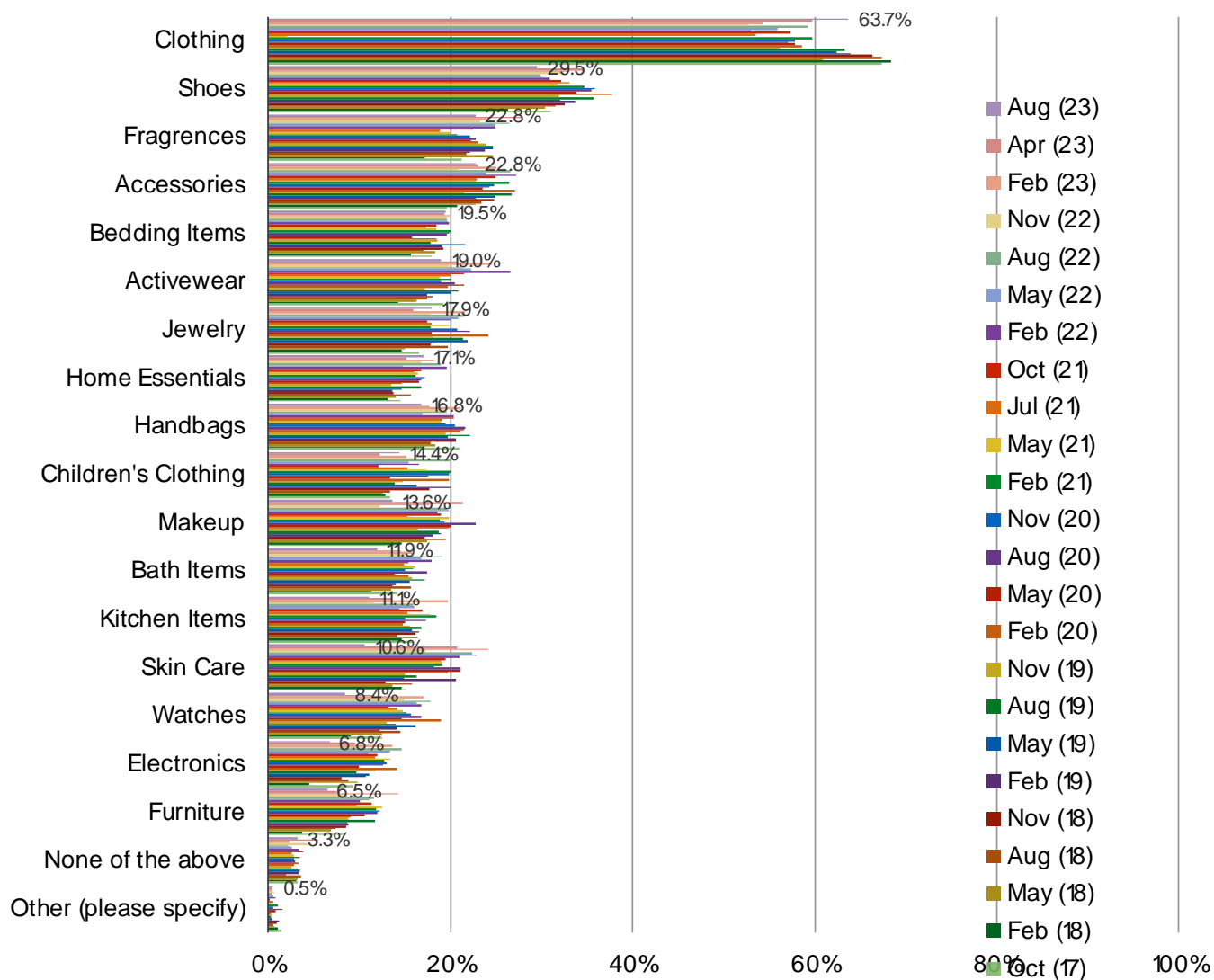
WHEN IS THE LAST TIME YOU PURCHASED SOMETHING FROM MACY'S?

Posed to all consumers.



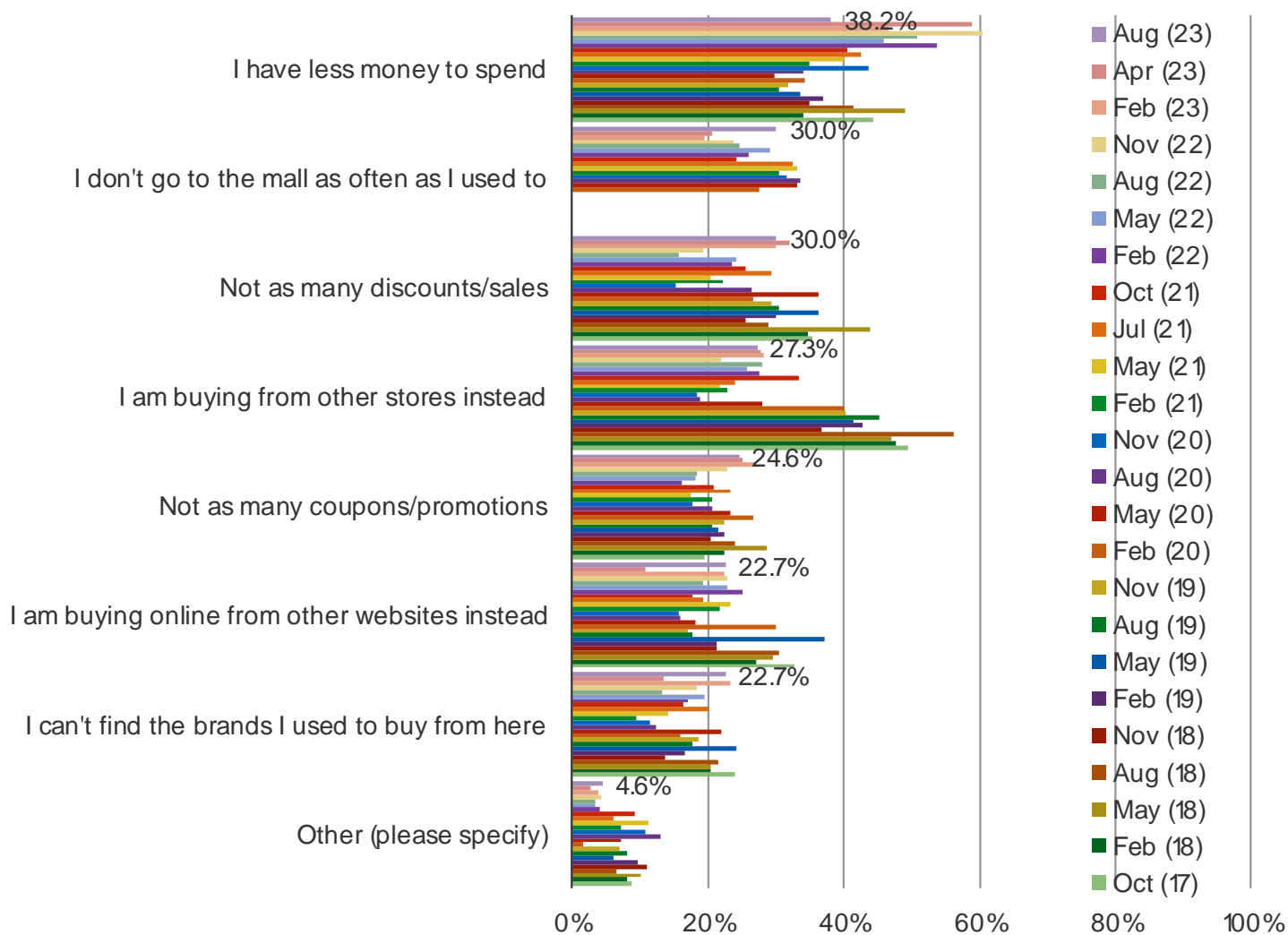
WHAT TYPE OF ITEMS DO YOU TYPICALLY BUY FROM MACY'S?

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



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

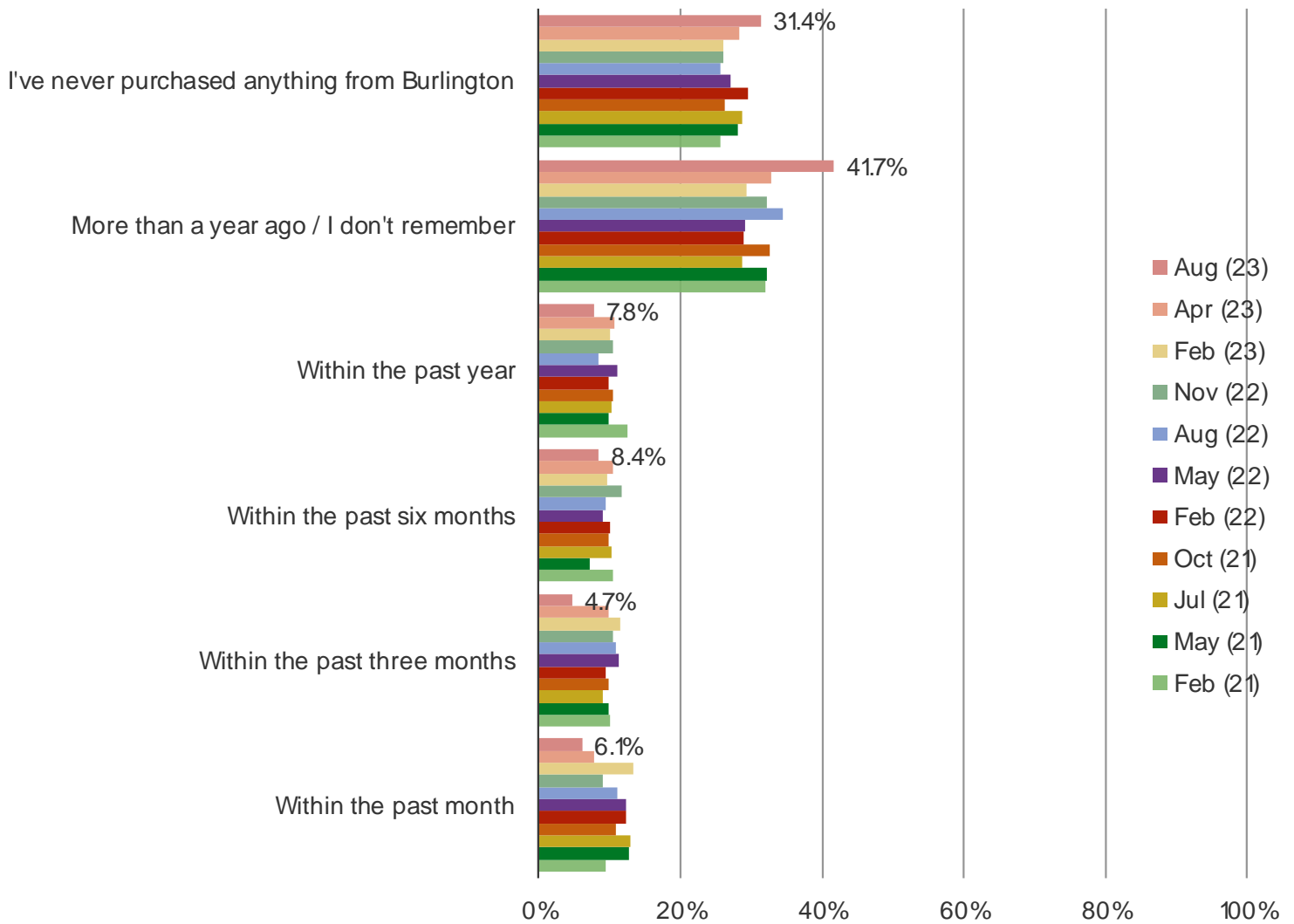
Posed to all consumers who purchased from Macy's in the past year, but said they are shopping it less compared to a year ago.



DEPARTMENT STORES DEEP DIVES: BURLINGTON

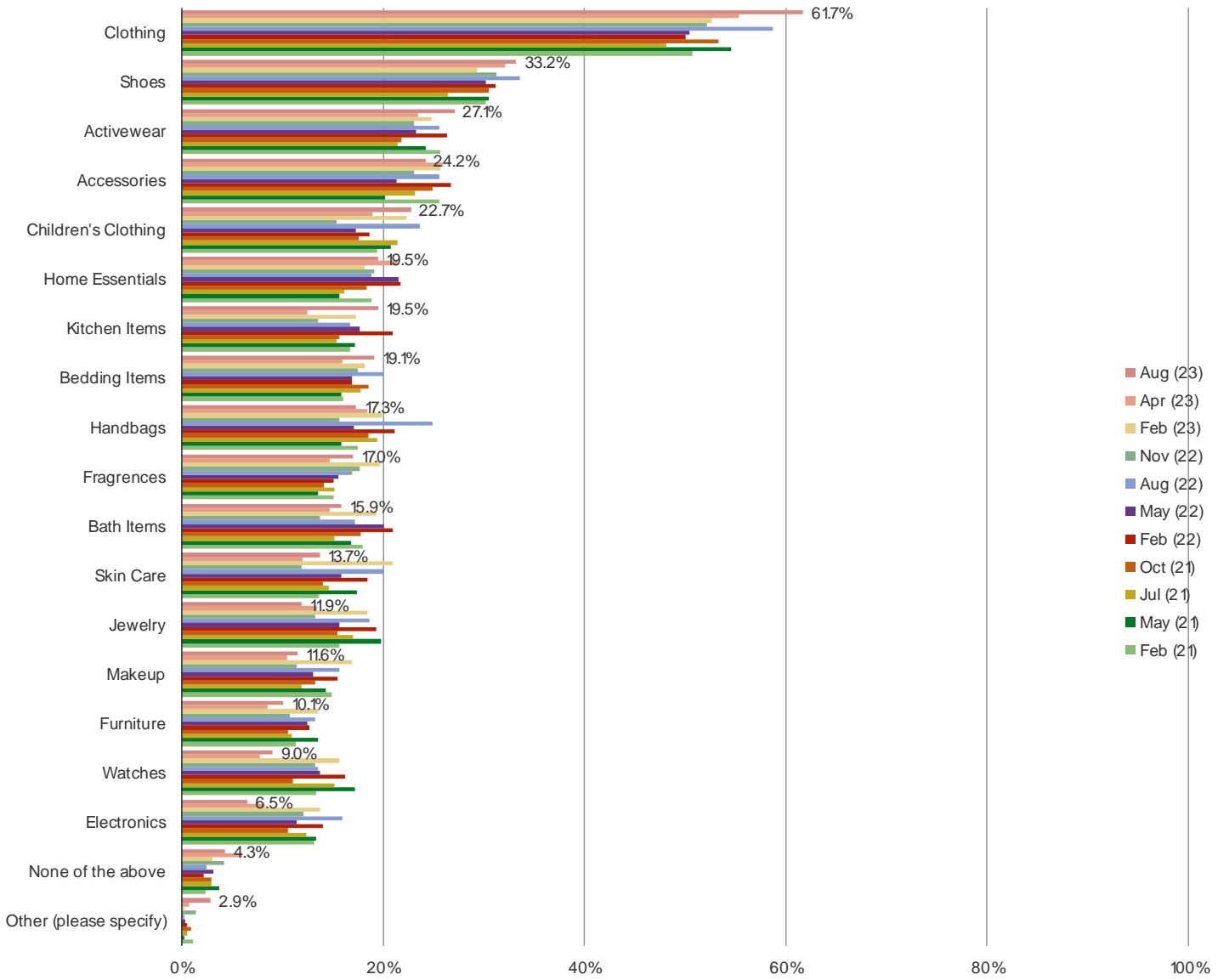
WHEN IS THE LAST TIME THAT YOU BOUGHT CLOTHING OR ACCESSORIES FOR YOURSELF FROM BURLINGTON?

Posed to all consumers.



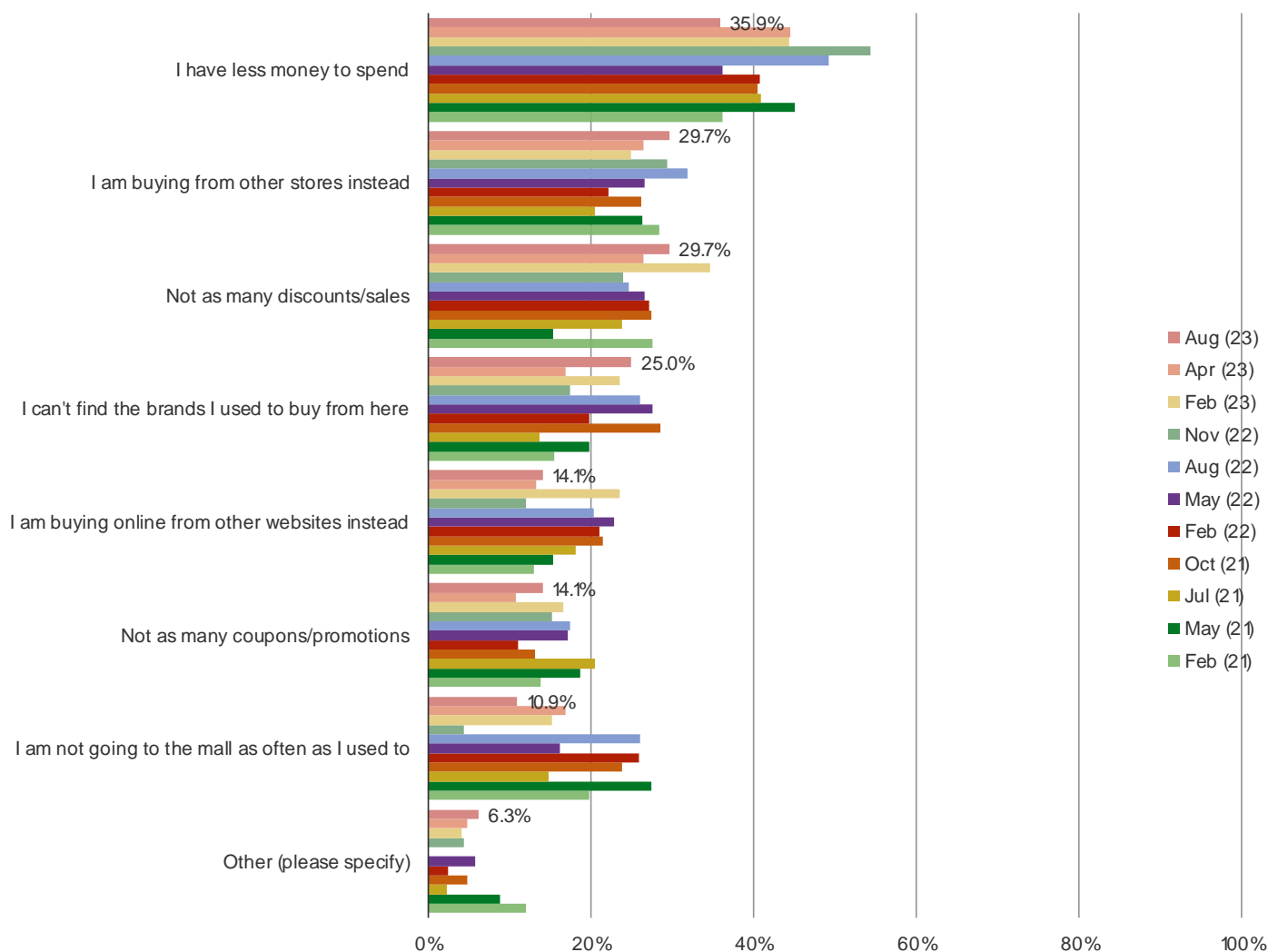
WHAT TYPES OF ITEMS DO YOU TYPICALLY BUY FROM BURLINGTON?

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



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

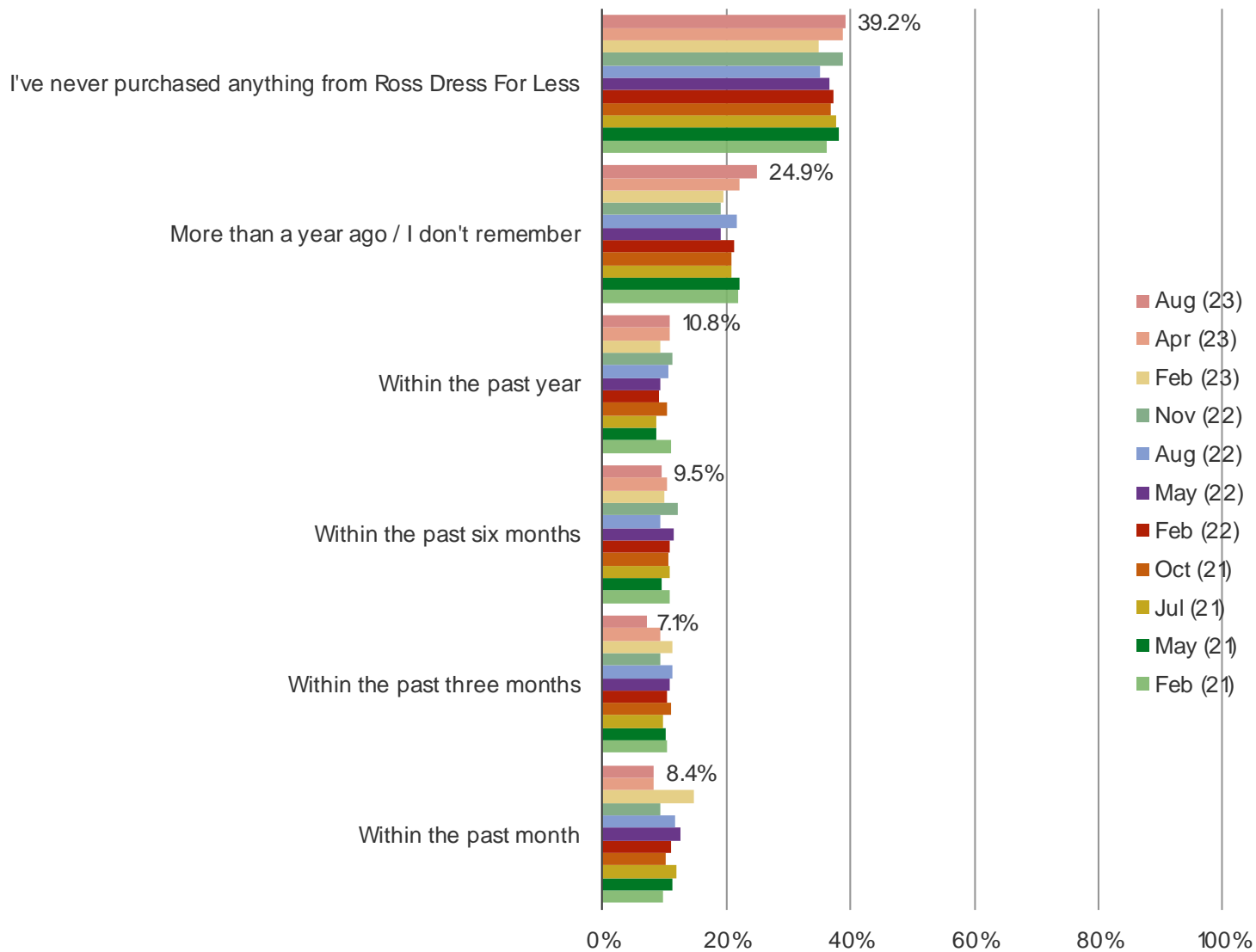
Posed to all consumers who purchased from Burlington in the past year, but said they are shopping it less compared to a year ago.



DEPARTMENT STORES DEEP DIVES: ROSS

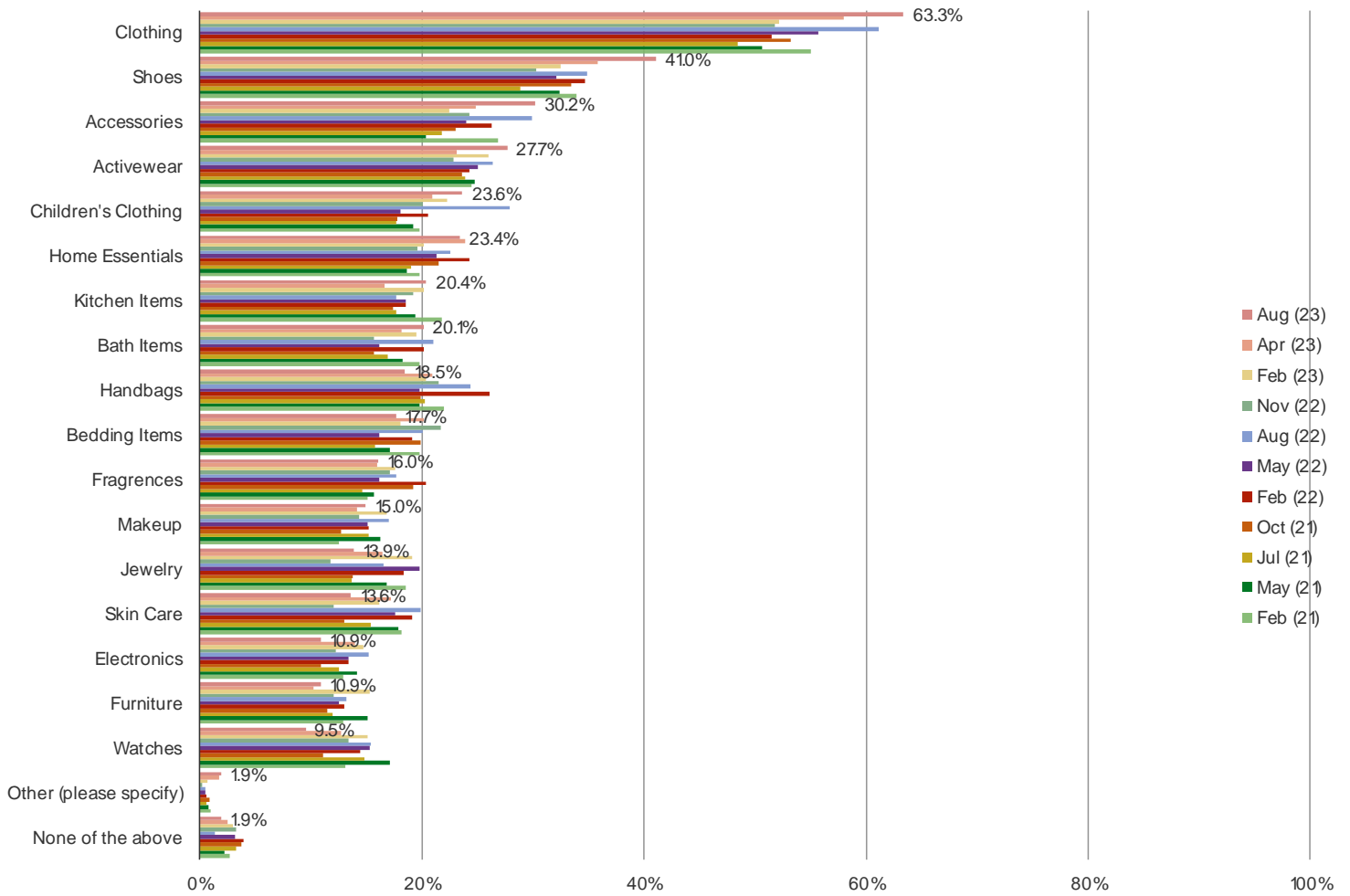
WHEN IS THE LAST TIME THAT YOU BOUGHT CLOTHING OR ACCESSORIES FOR YOURSELF FROM ROSS DRESS FOR LESS?

Posed to all consumers.



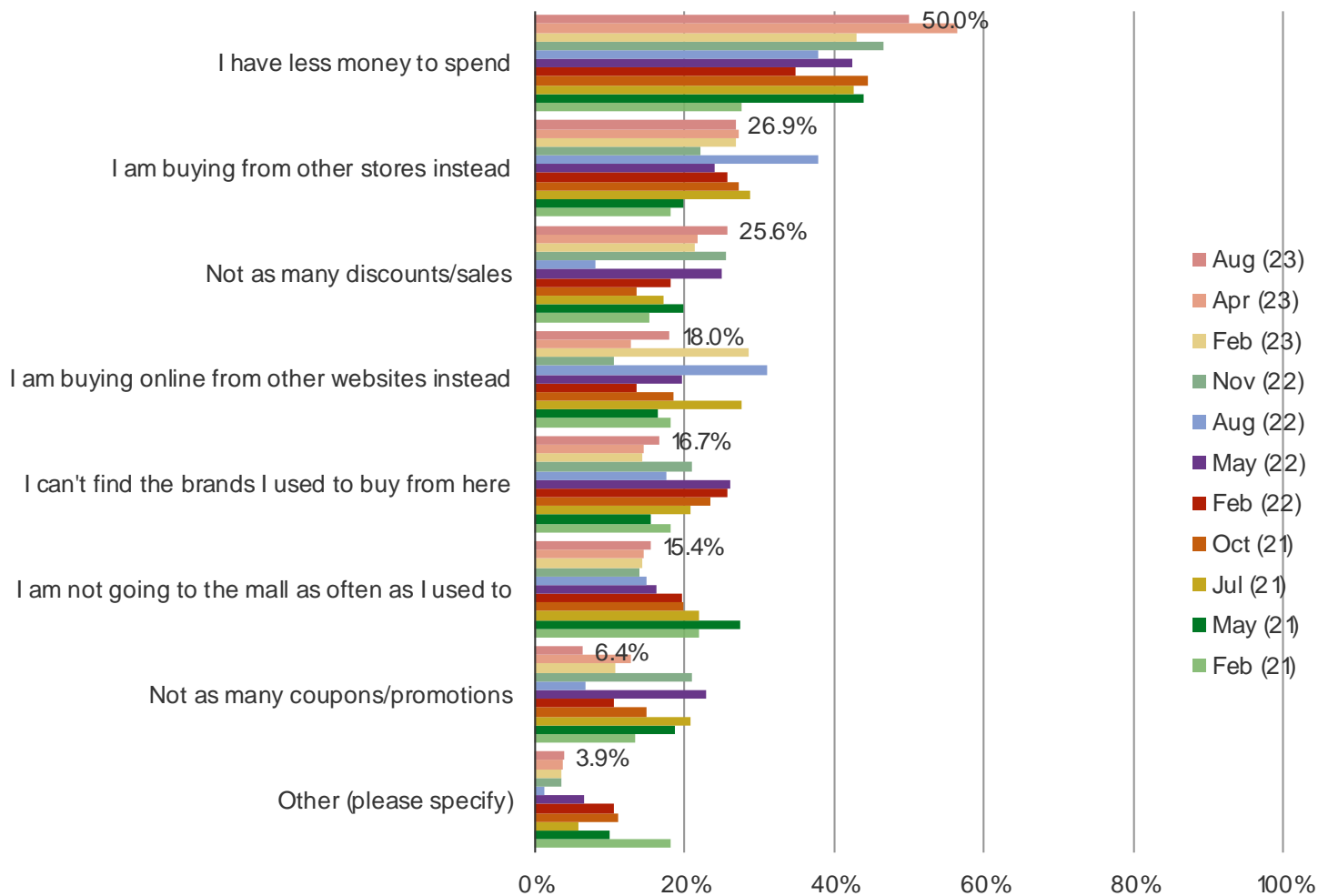
WHAT TYPES OF ITEMS DO YOU TYPICALLY BUY FROM ROSS DRESS FOR LESS?

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



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

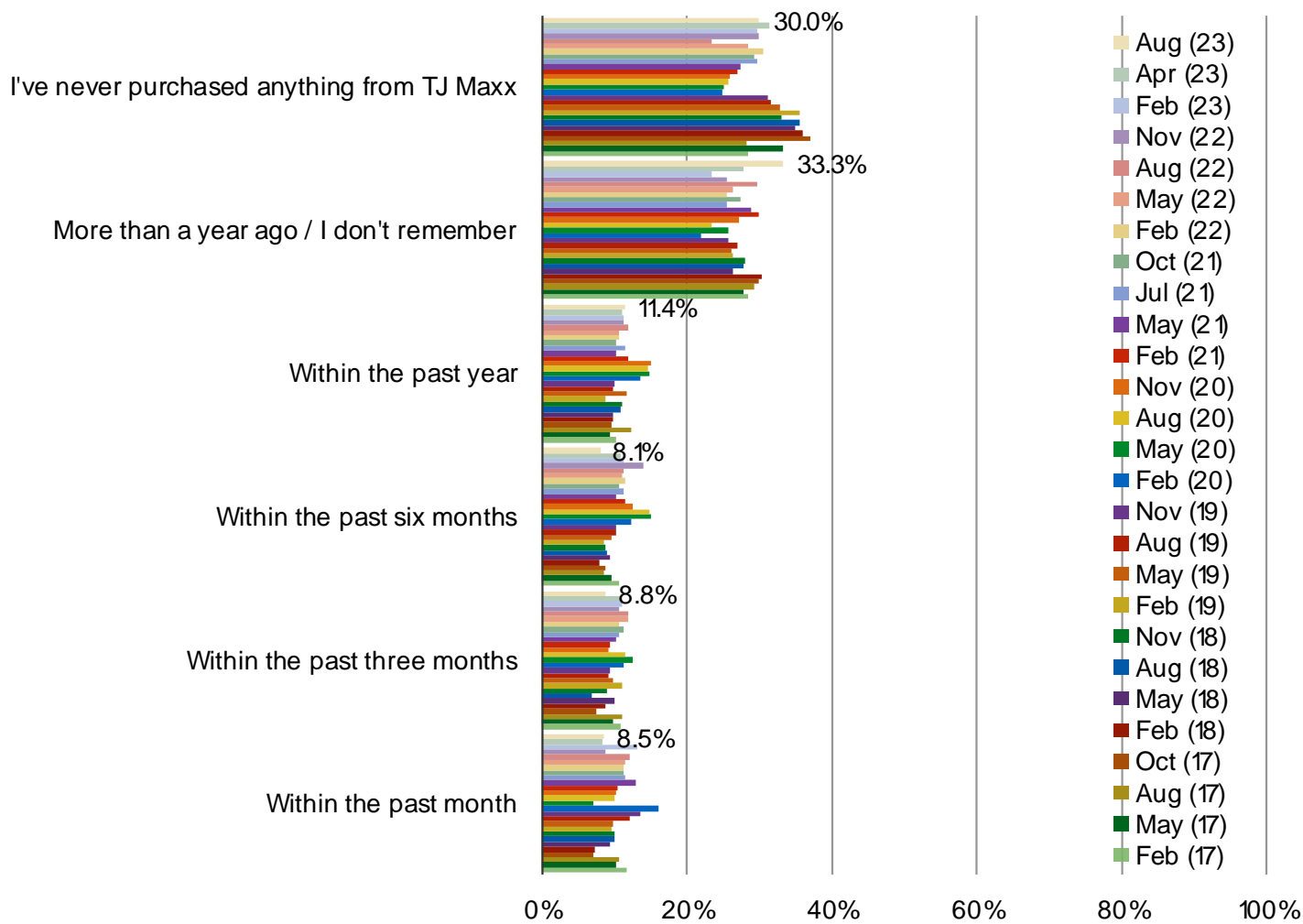
Posed to all consumers who purchased from Ross in the past year, but said they are shopping it less compared to a year ago.



DEPARTMENT STORES DEEP DIVES: TJ MAXX

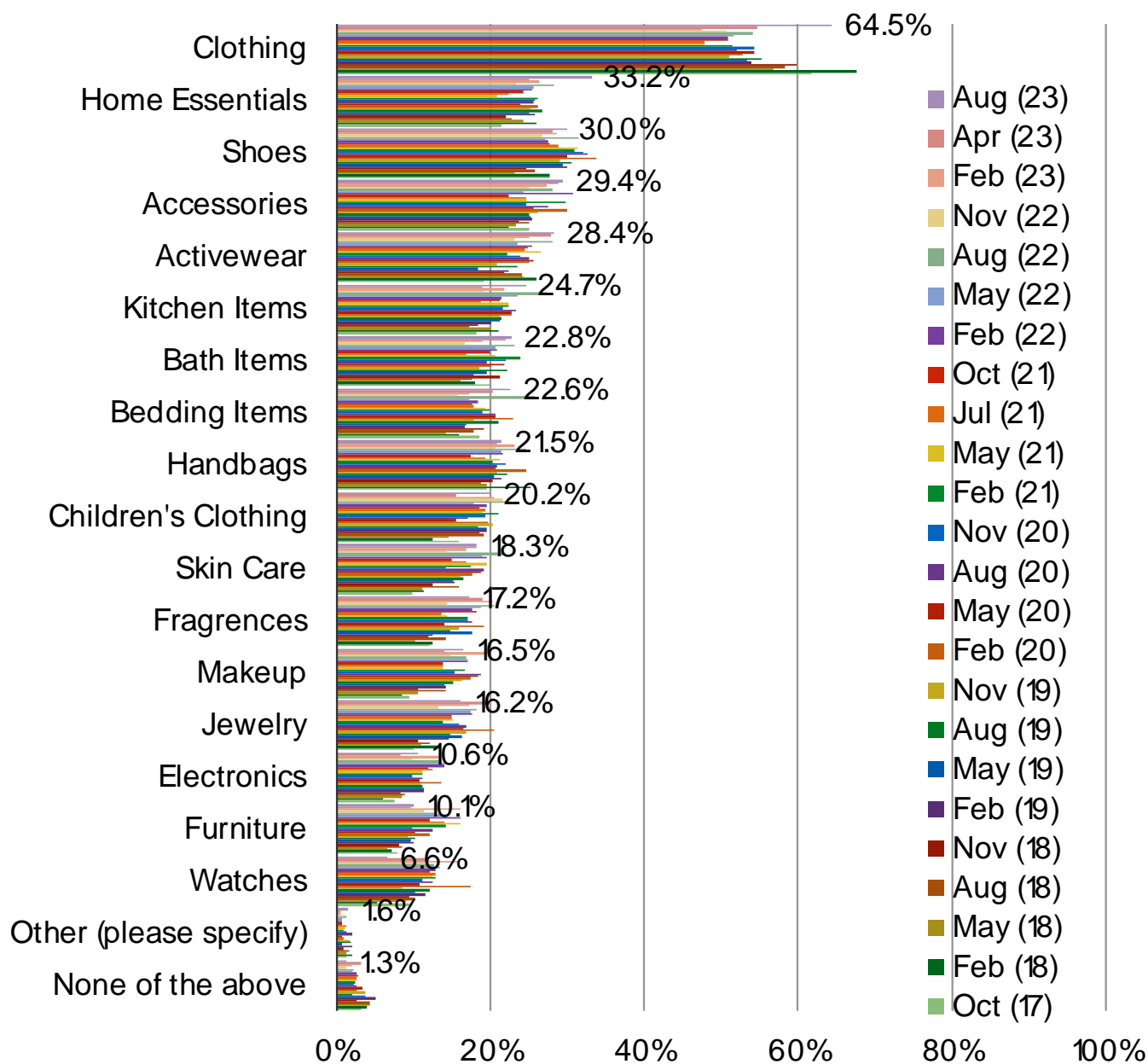
WHEN IS THE LAST TIME YOU PURCHASED SOMETHING FROM TJ MAXX?

Posed to all consumers.



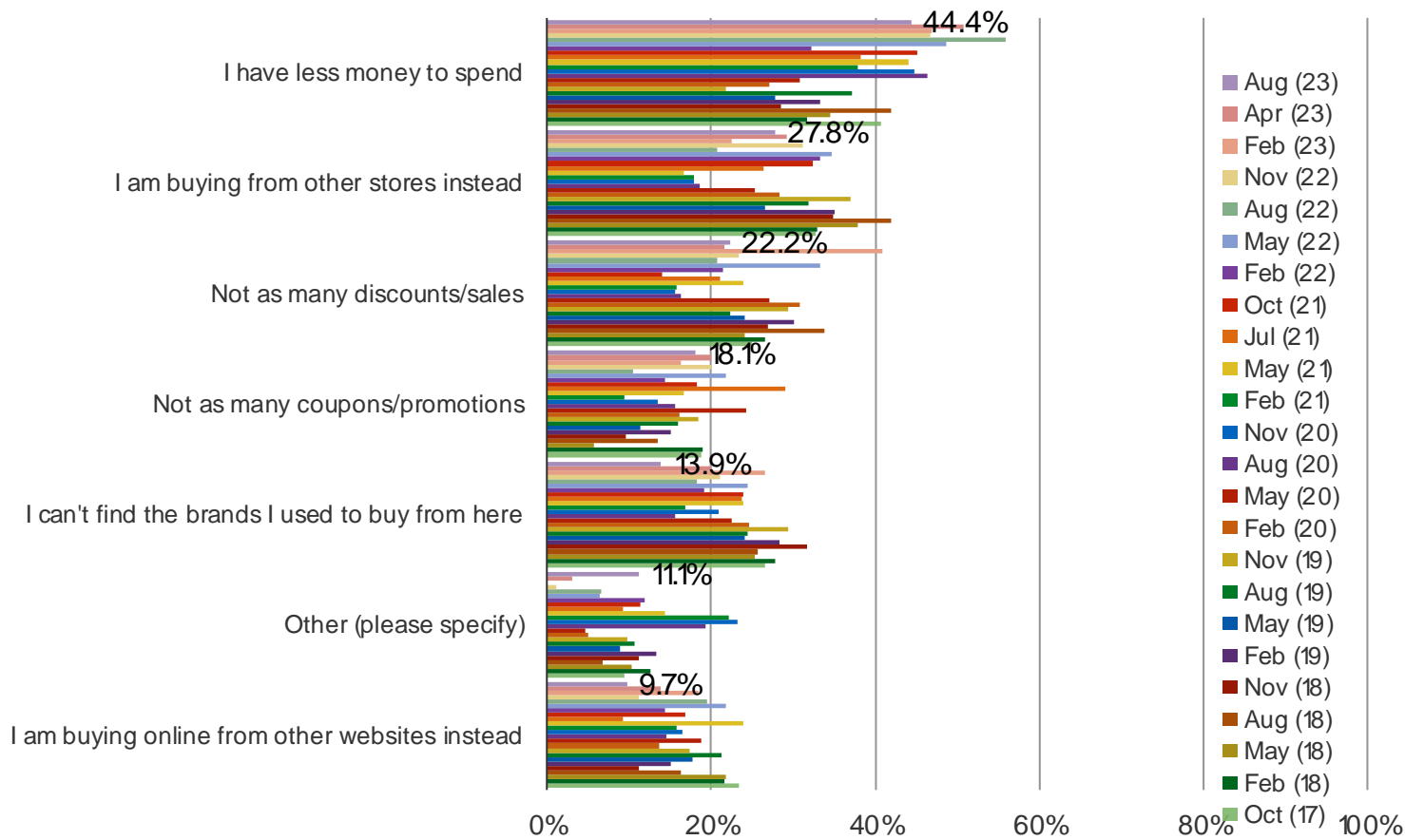
WHAT TYPE OF ITEMS DO YOU TYPICALLY BUY FROM TJ MAXX?

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



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

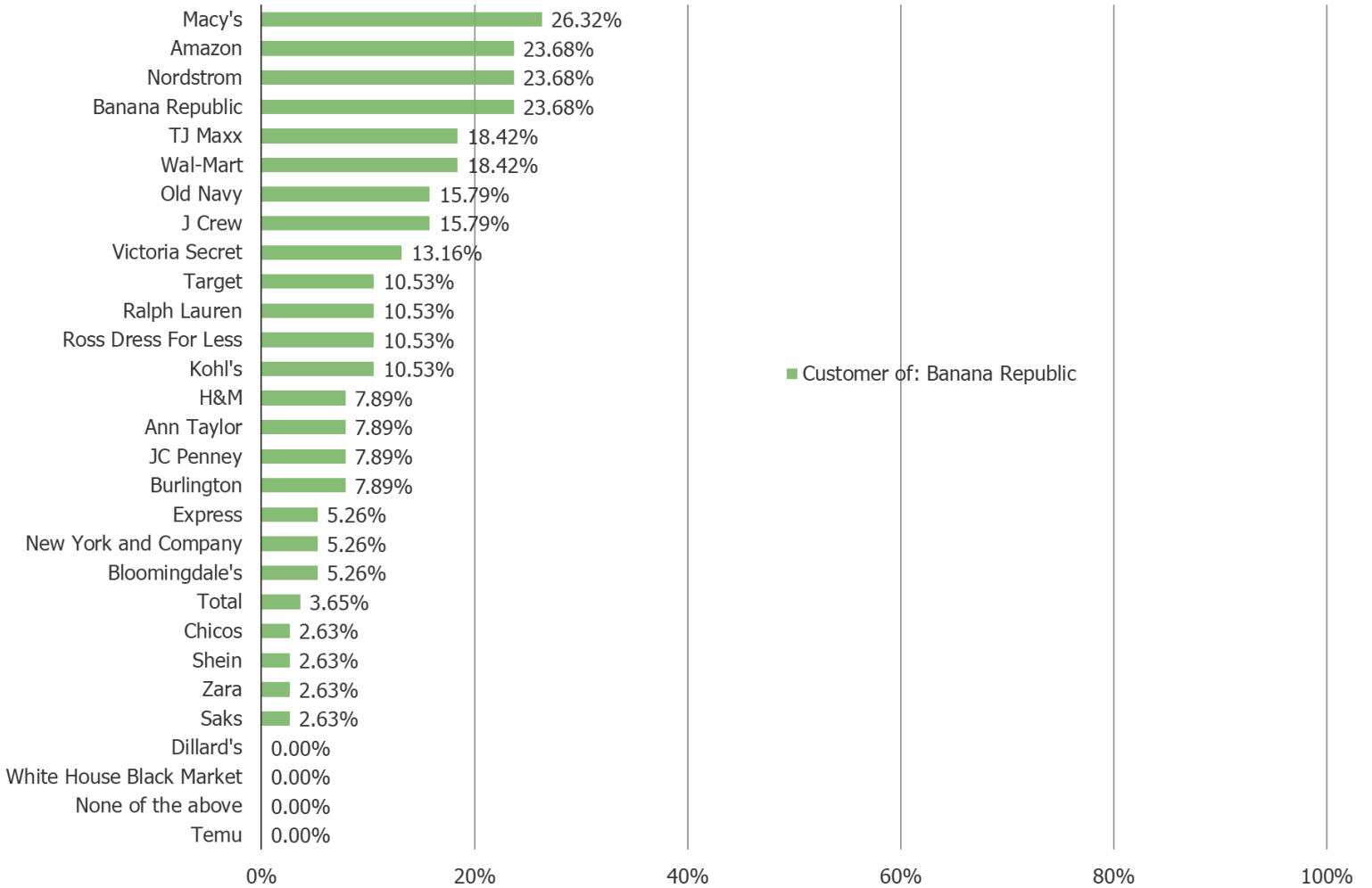
Posed to all consumers who purchased from TJ Maxx in the past year, but said they are shopping it less compared to a year ago.



CROSS-TABS: CUSTOMERS OF VARIOUS RETAILERS X WHO THEY WOULD SHOP TODAY...

IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Banana Republic**

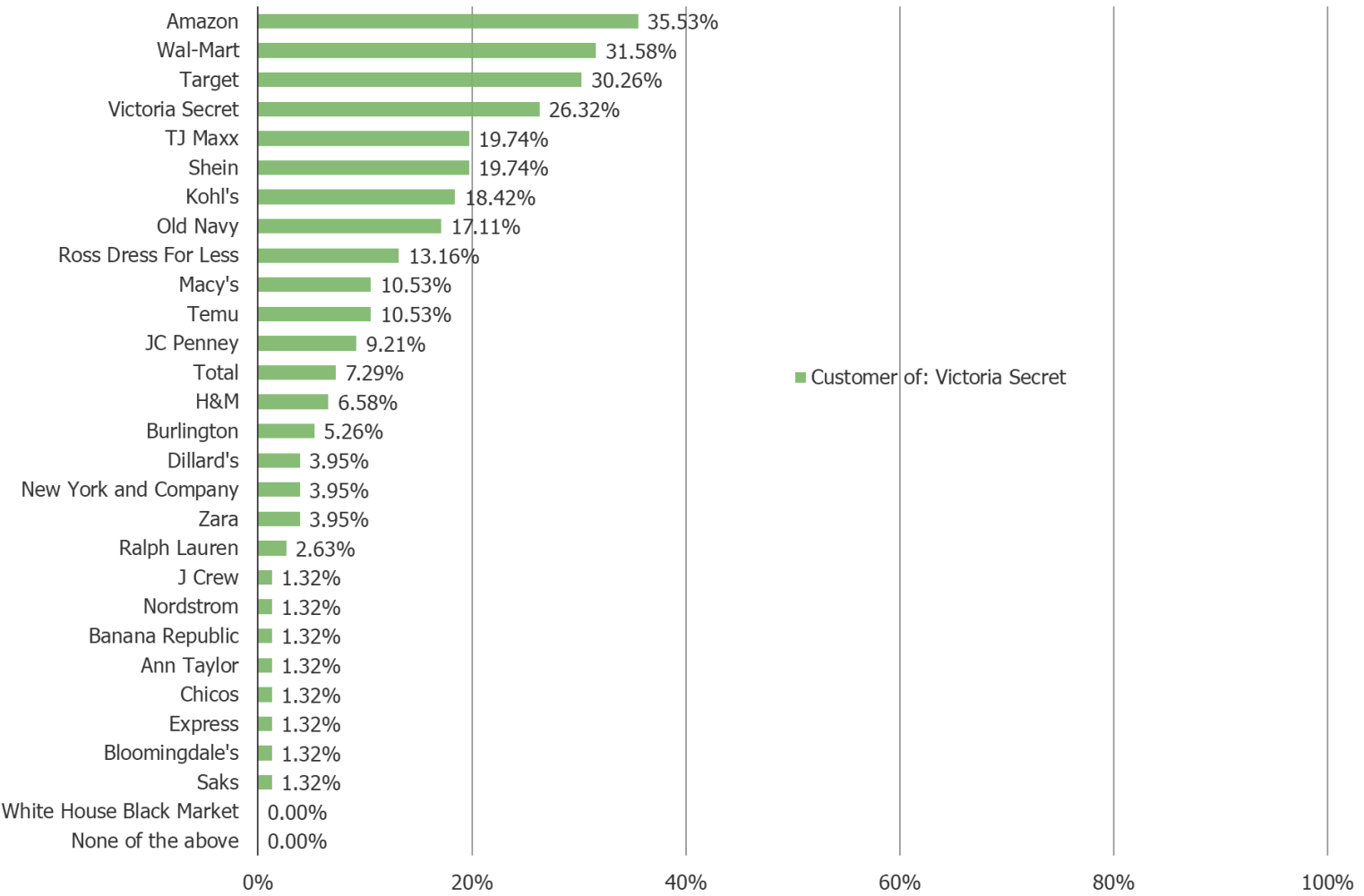


BESPOKE Surveys

Department Stores

IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Victoria Secret**

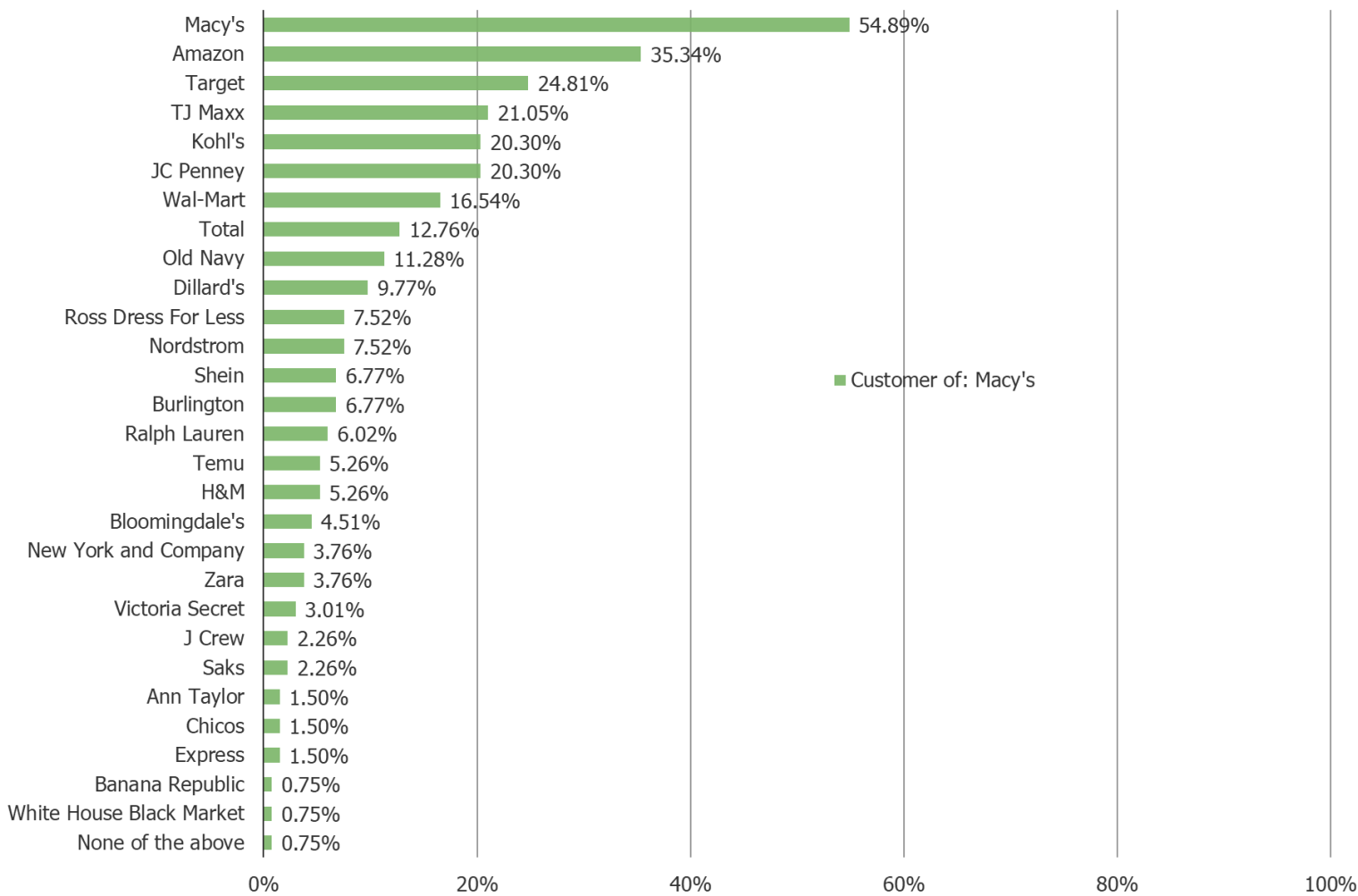


BESPOKE Surveys

Department Stores

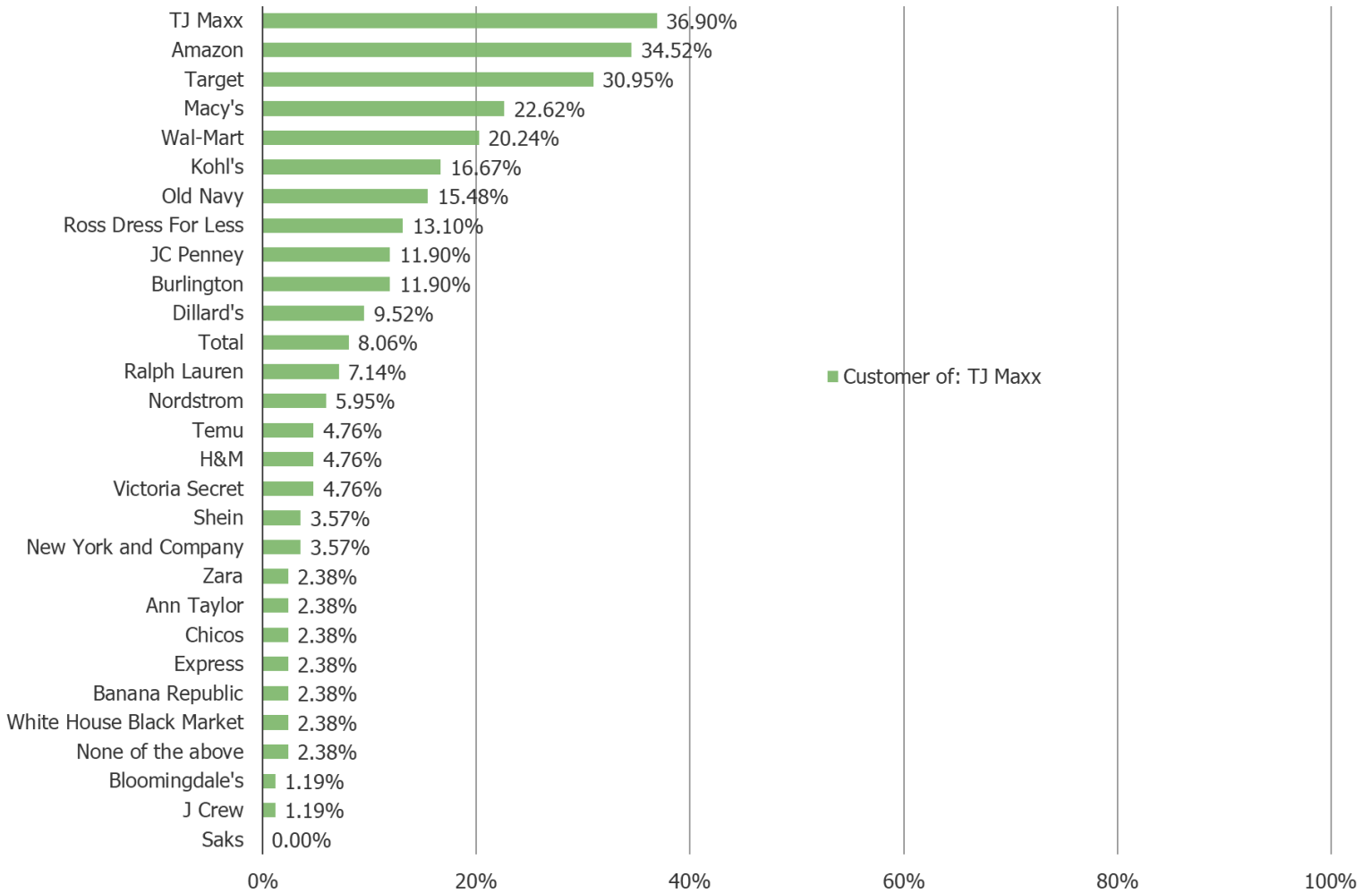
IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Macy's**



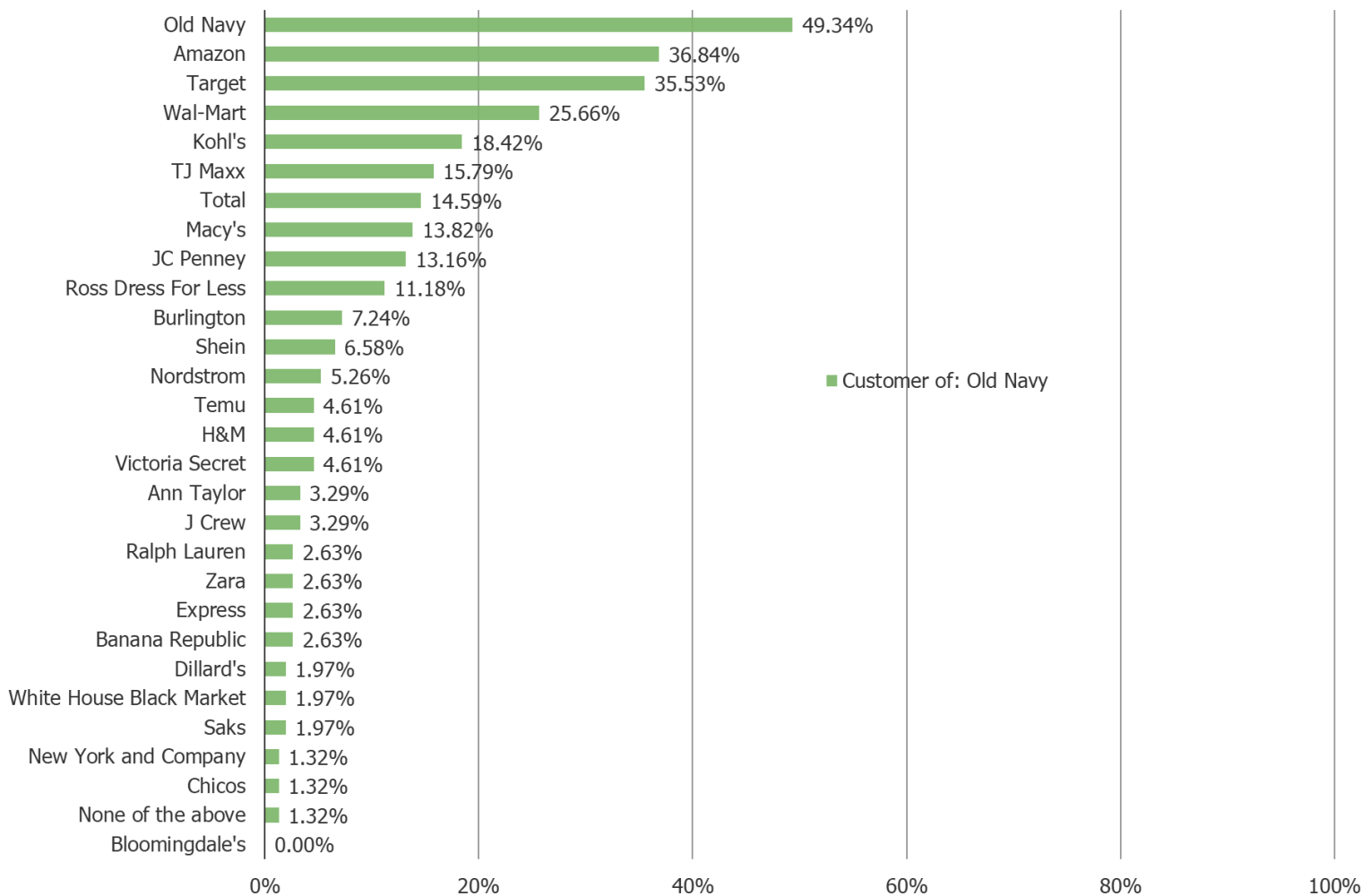
IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **TJ Maxx**



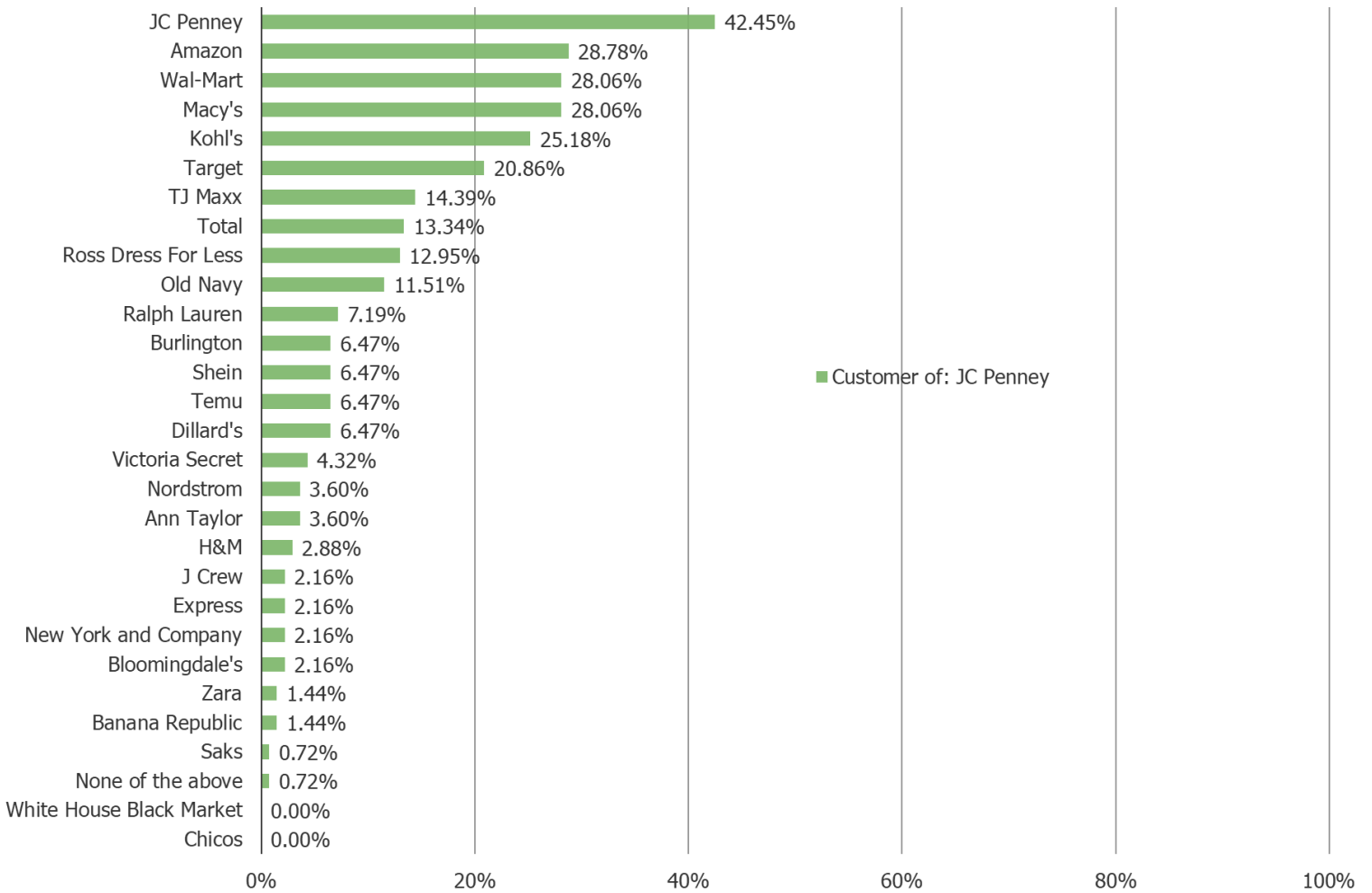
IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Old Navy**



IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **JC Penney**

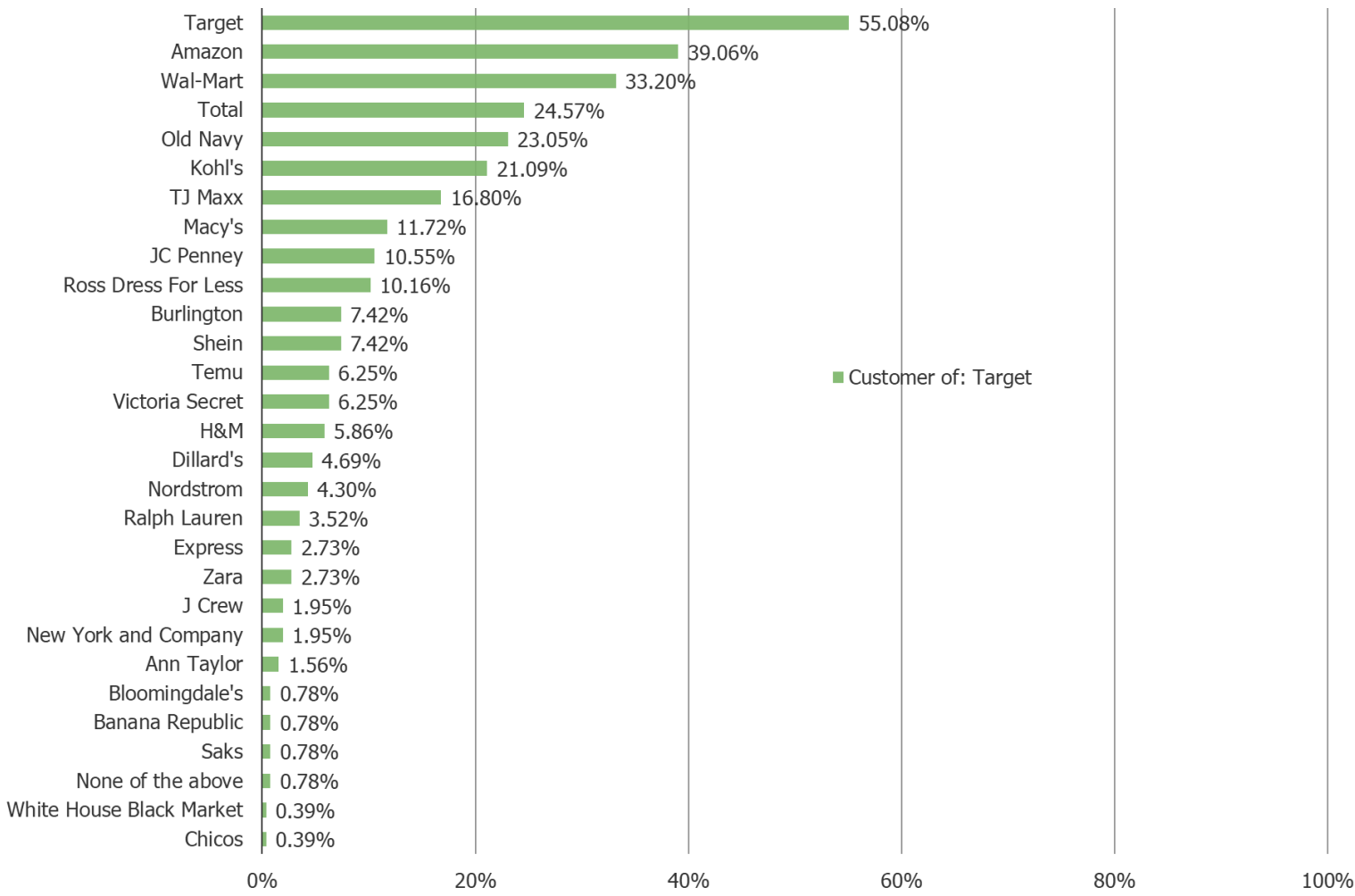


BESPOKE Surveys

Department Stores

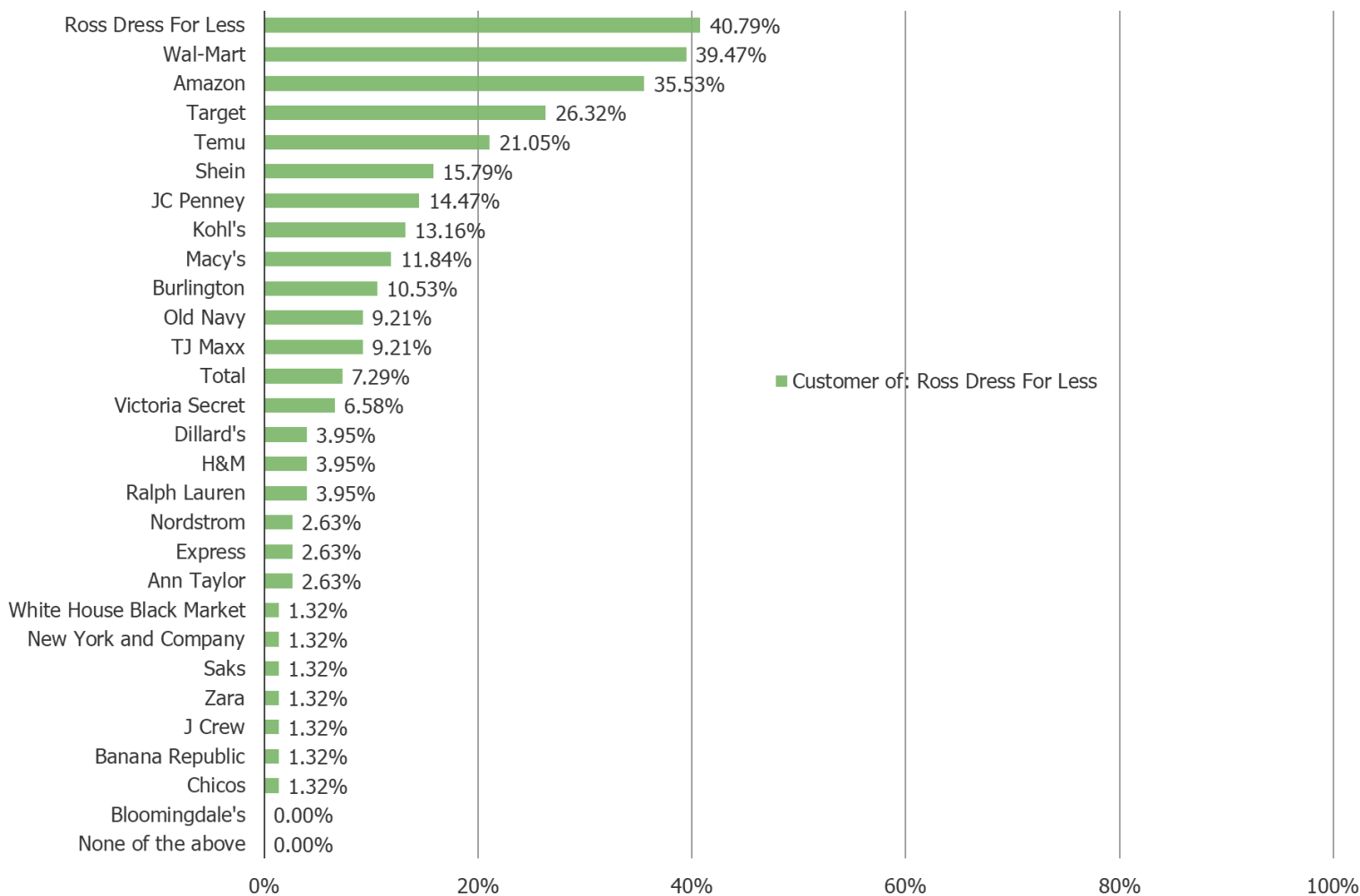
IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Target**



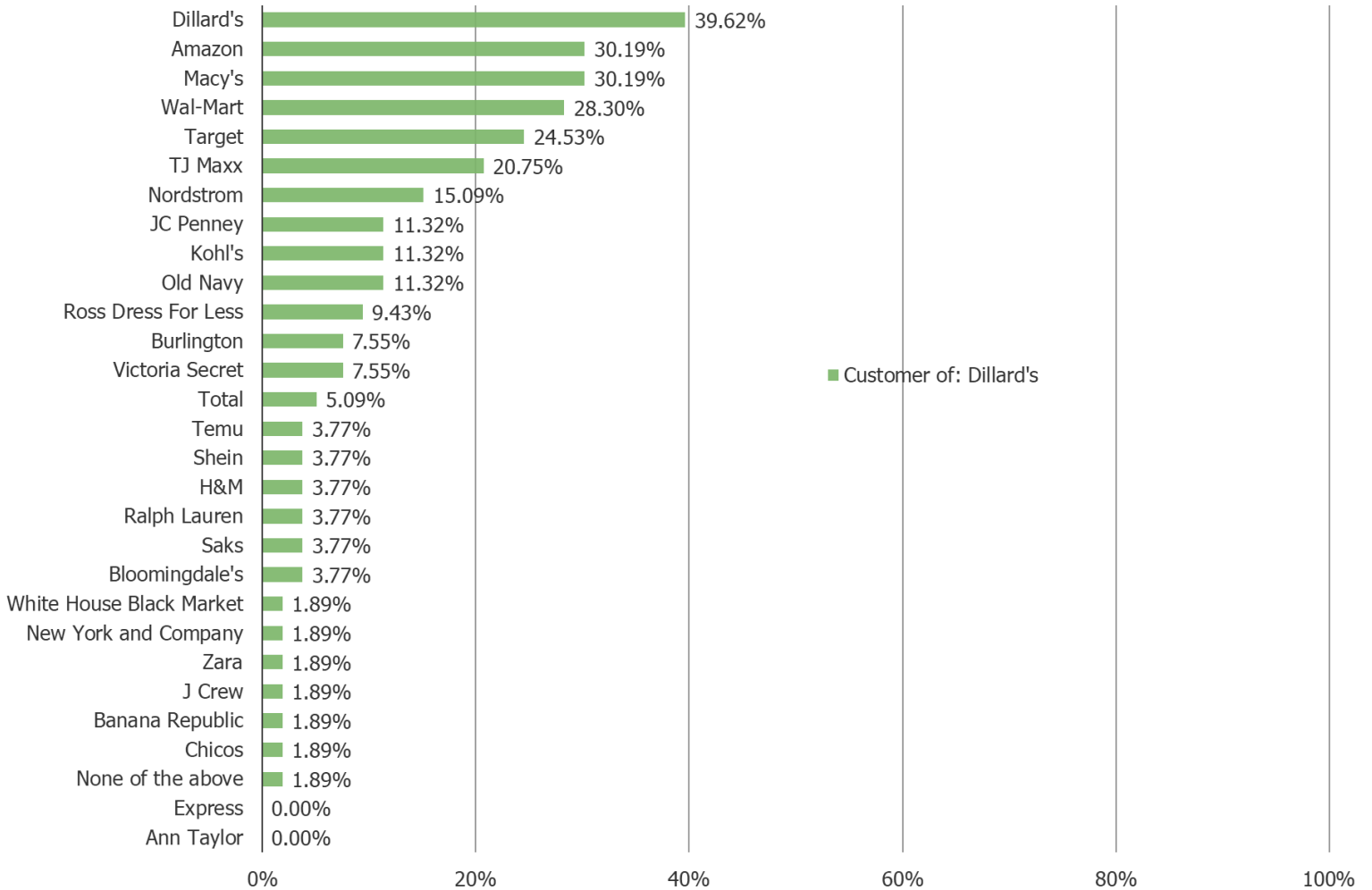
IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Ross**



IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Dillard's**

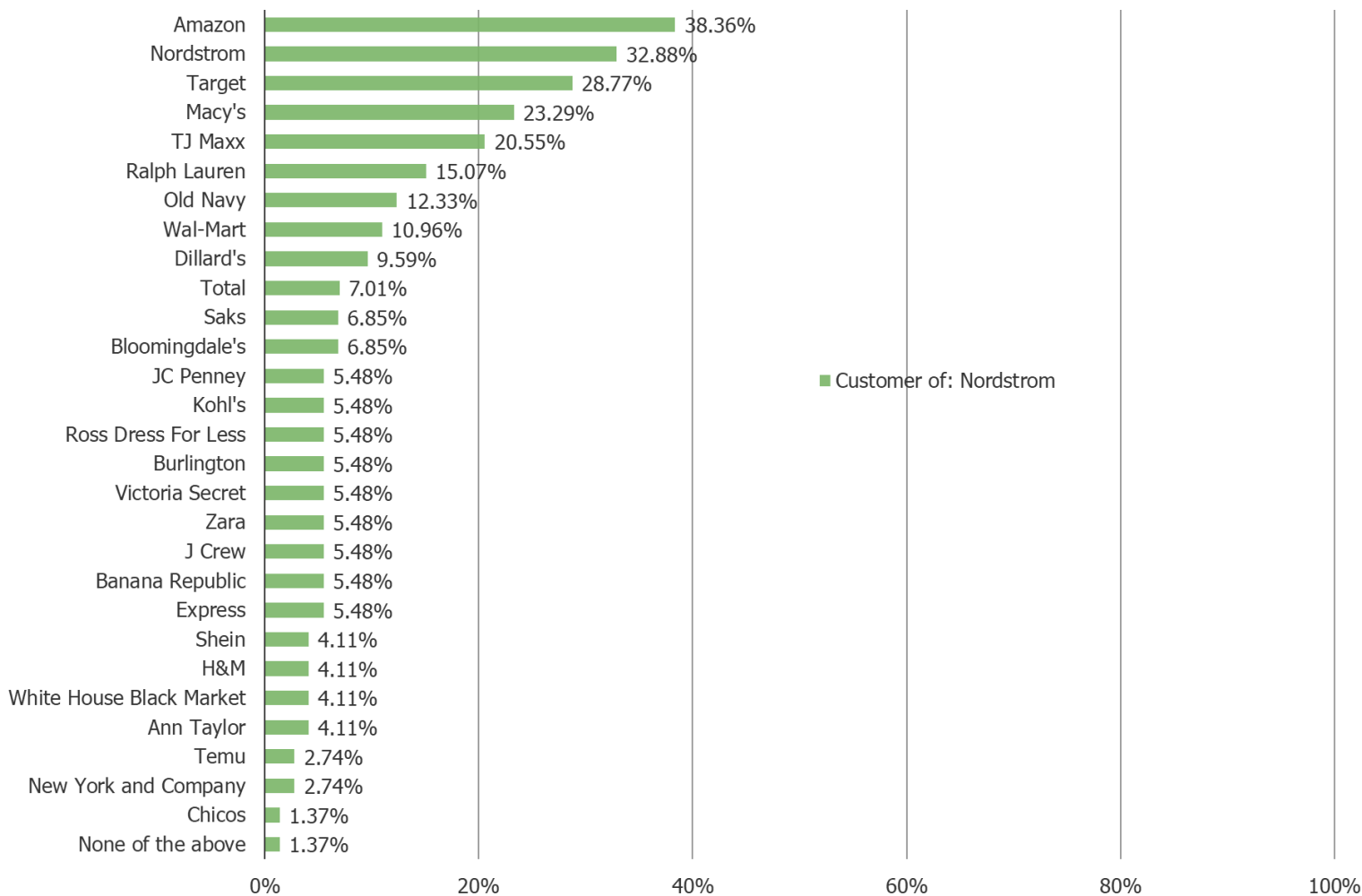


BESPOKE Surveys

Department Stores

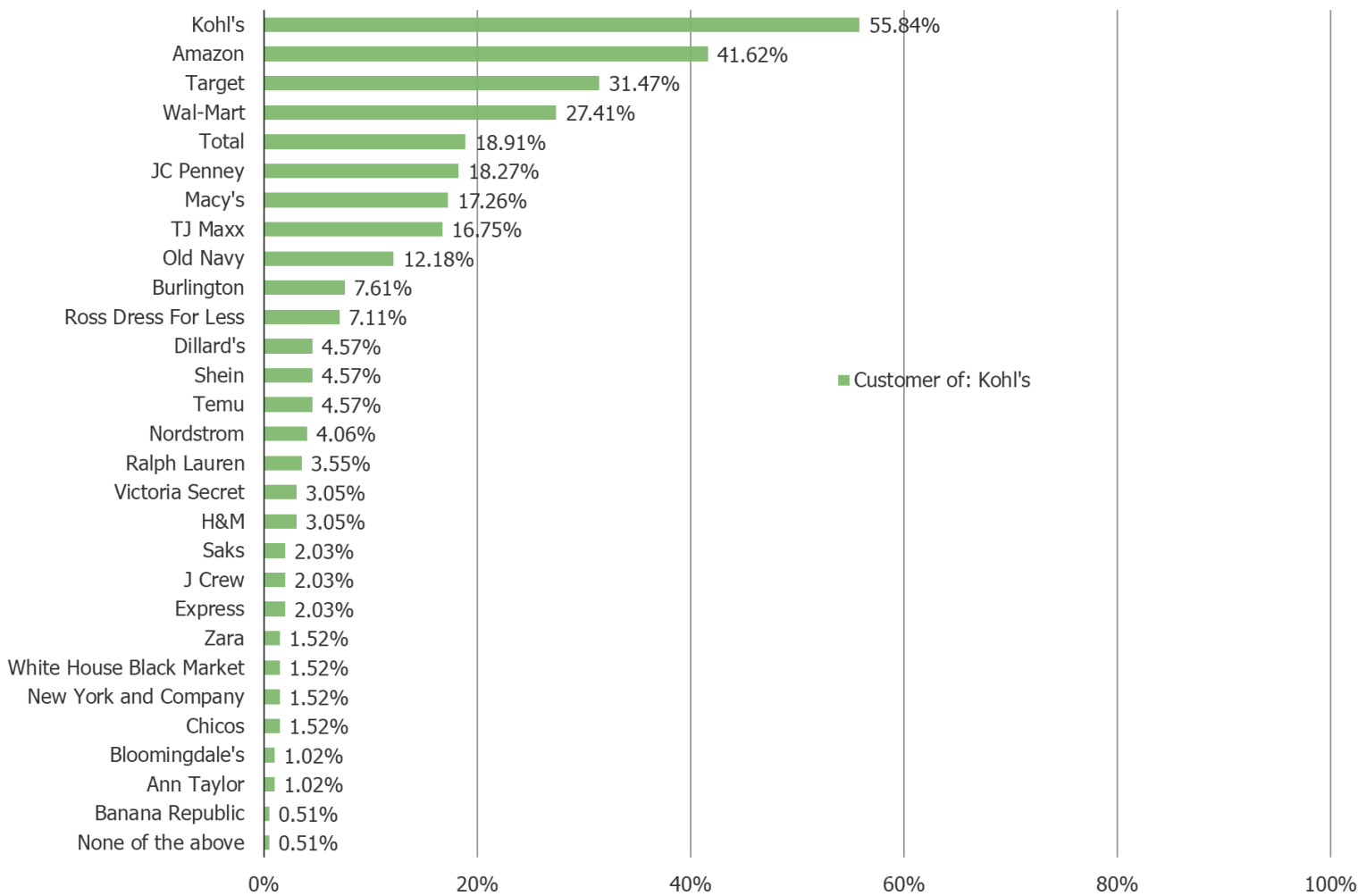
IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Nordstrom**



IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Kohl's**

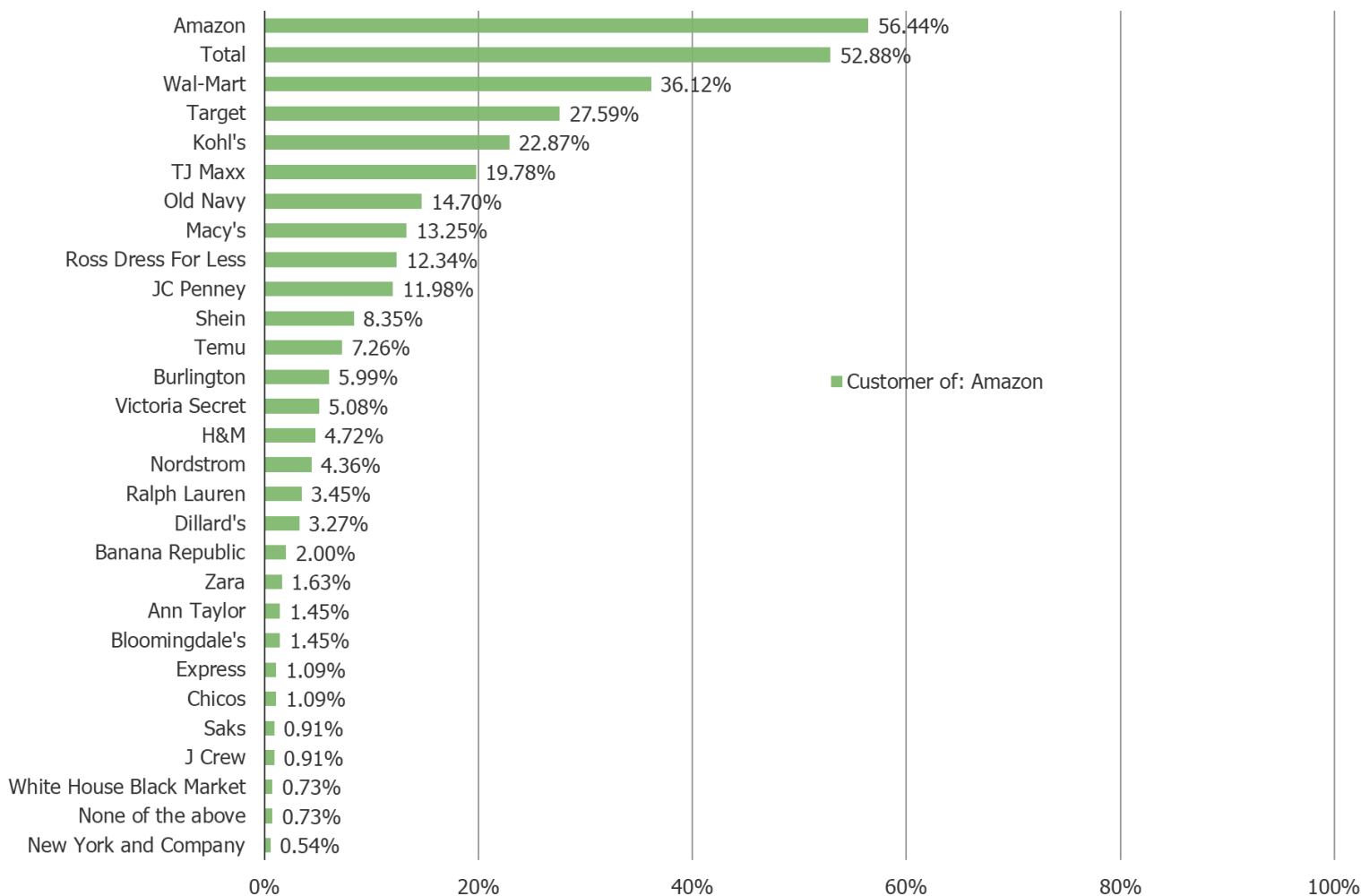


BESPOKE Surveys

Department Stores

IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Old Navy**

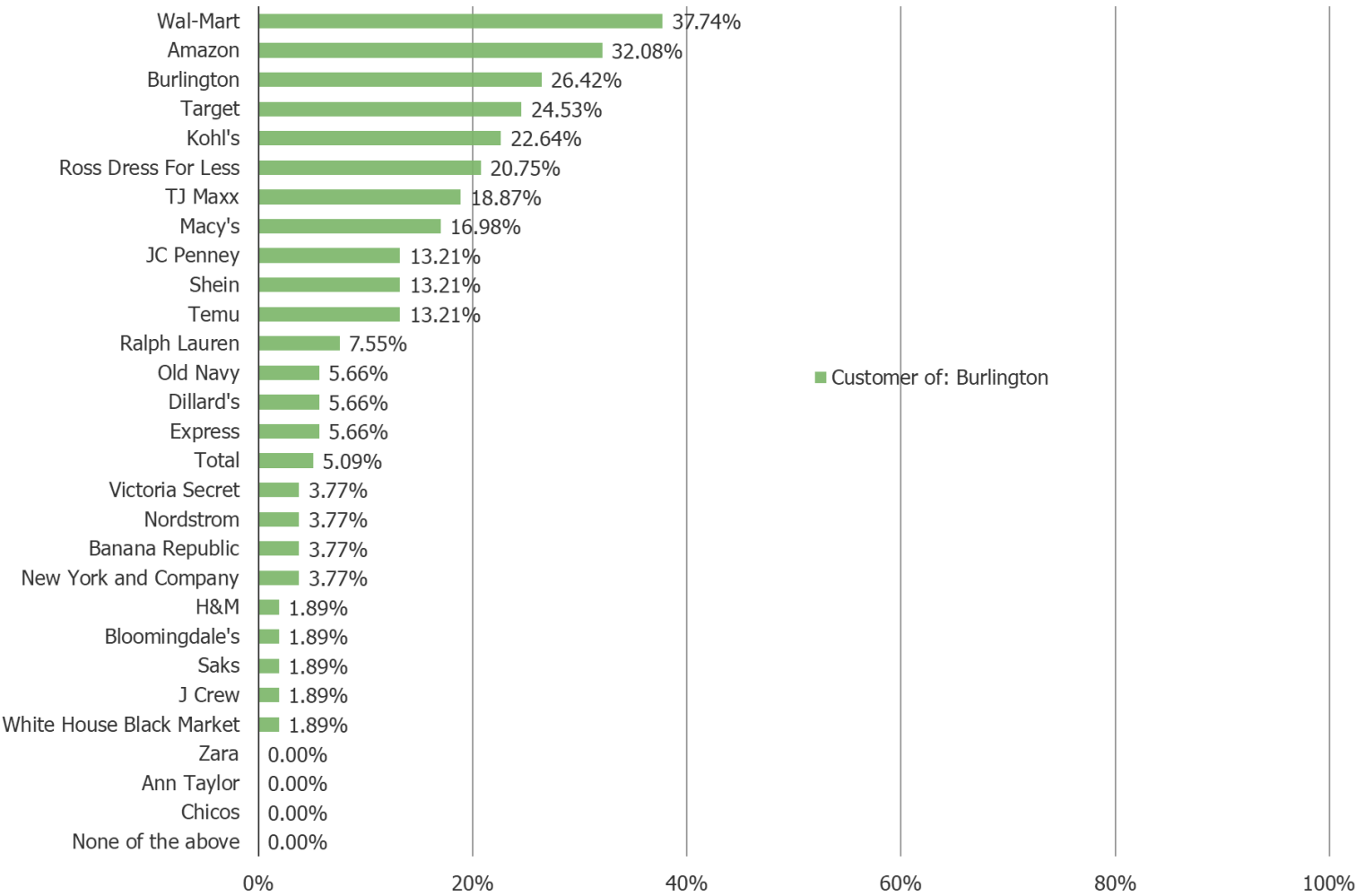


BESPOKE Surveys

Department Stores

IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Burlington**

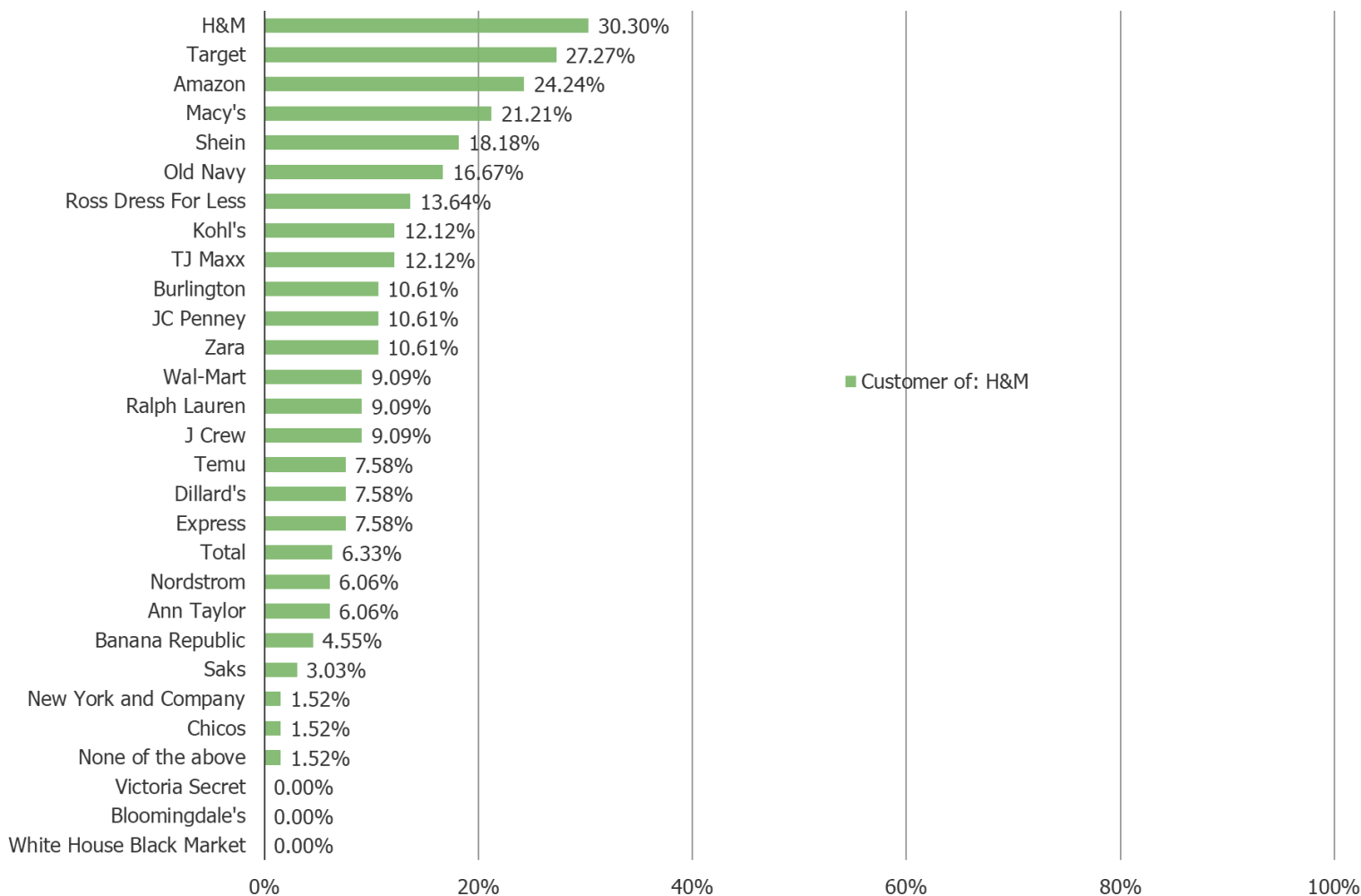


BESPOKE Surveys

Department Stores

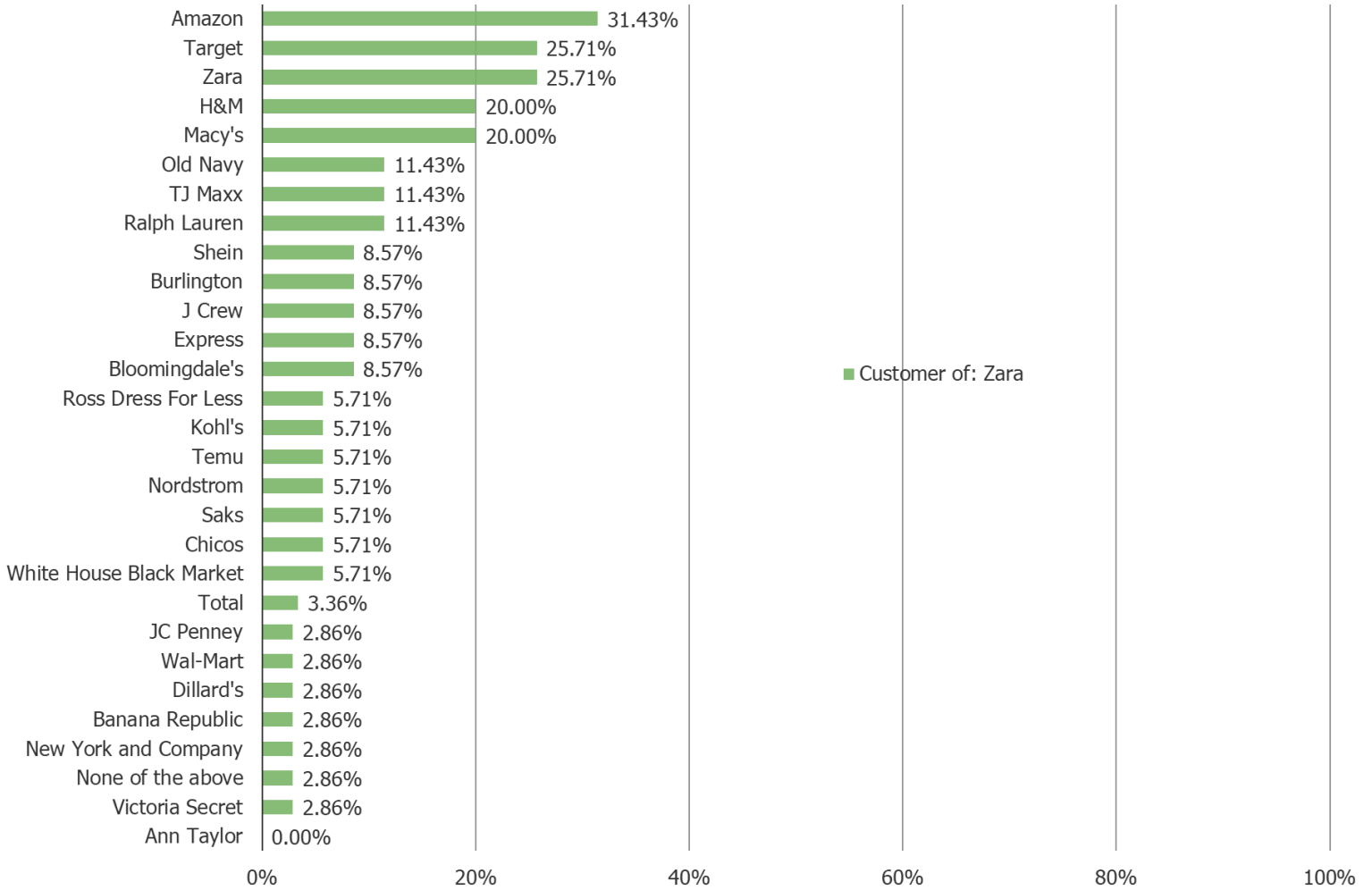
IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **H&M**



IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Zara**

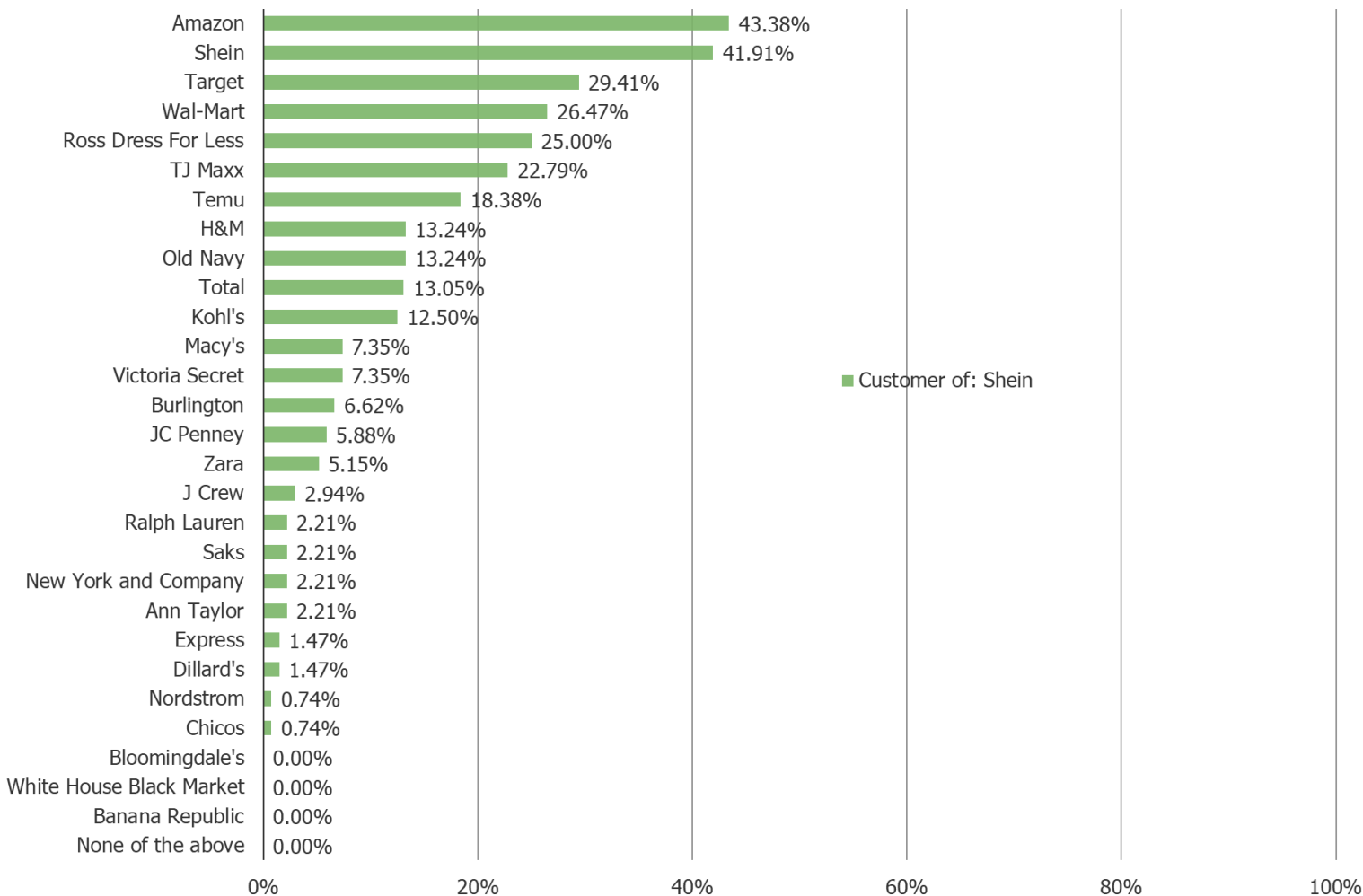


BESPOKE Surveys

Department Stores

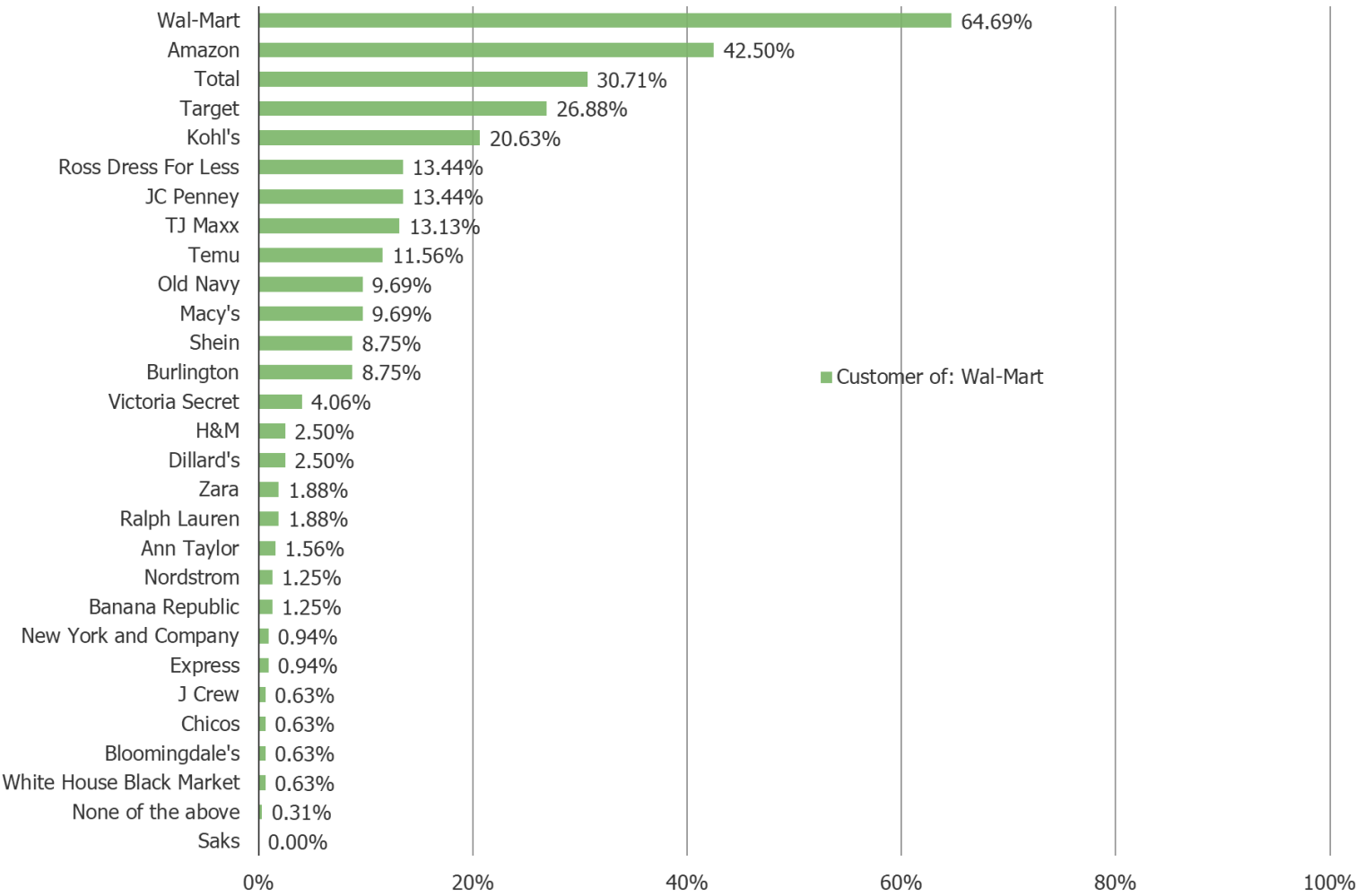
IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Shein**



IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIS FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Wal-Mart**

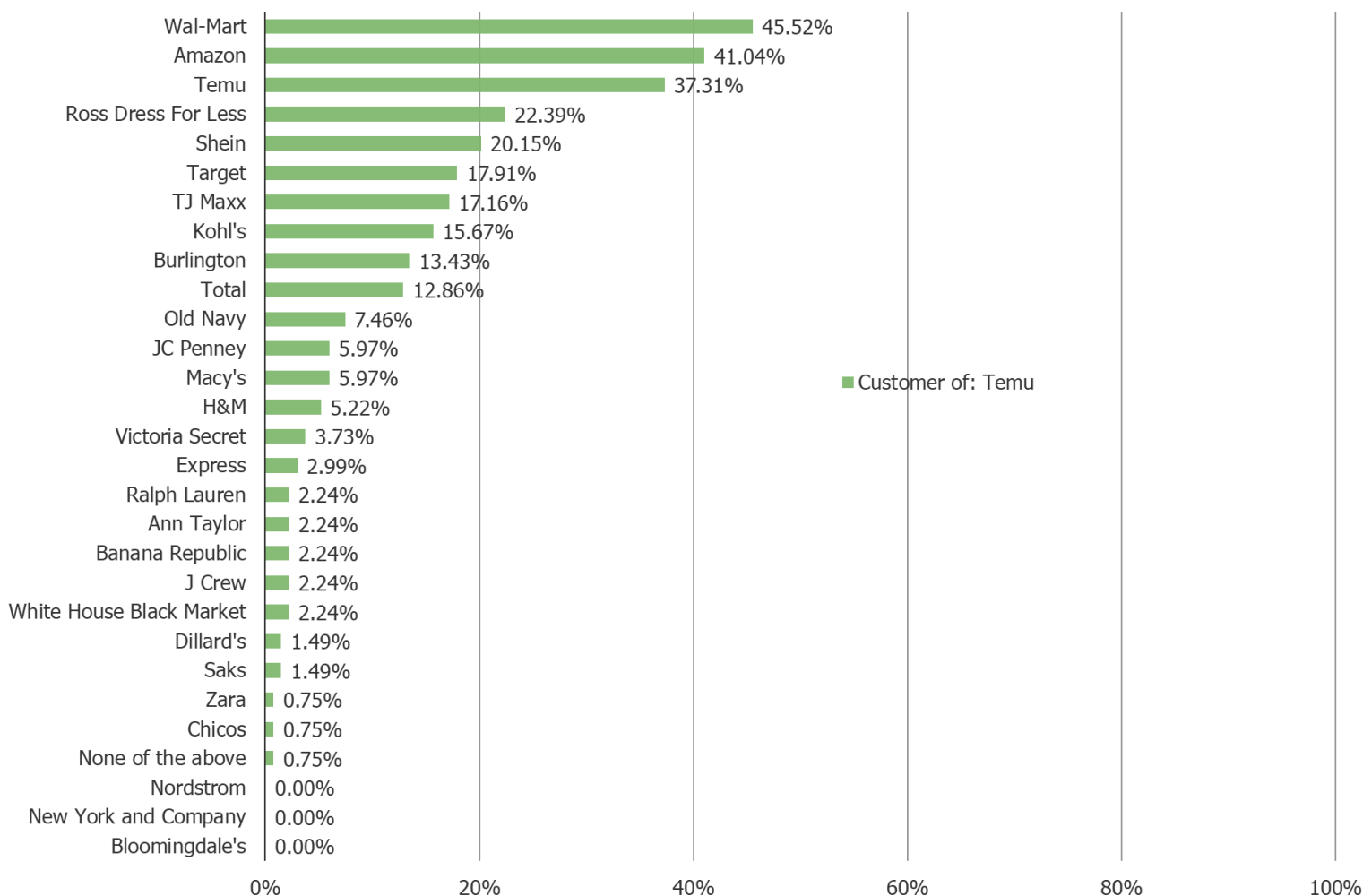


BESPOKE Surveys

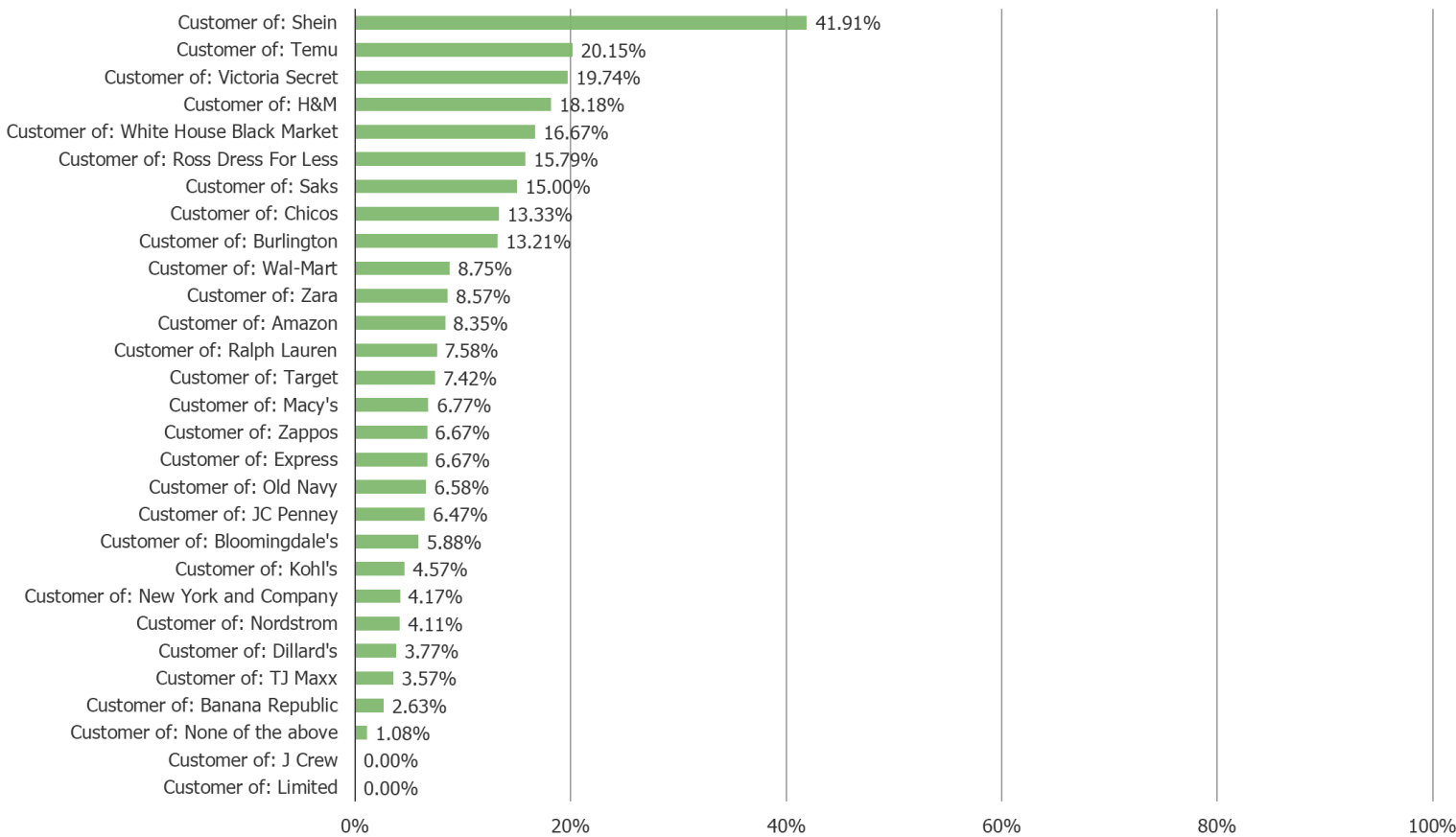
Department Stores

IF YOU WERE SHOPPING FOR CLOTHING OR ACCESSORIES FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT... (SELECT UP TO THREE CHOICES)

Posed to respondents who shop **Old Navy**

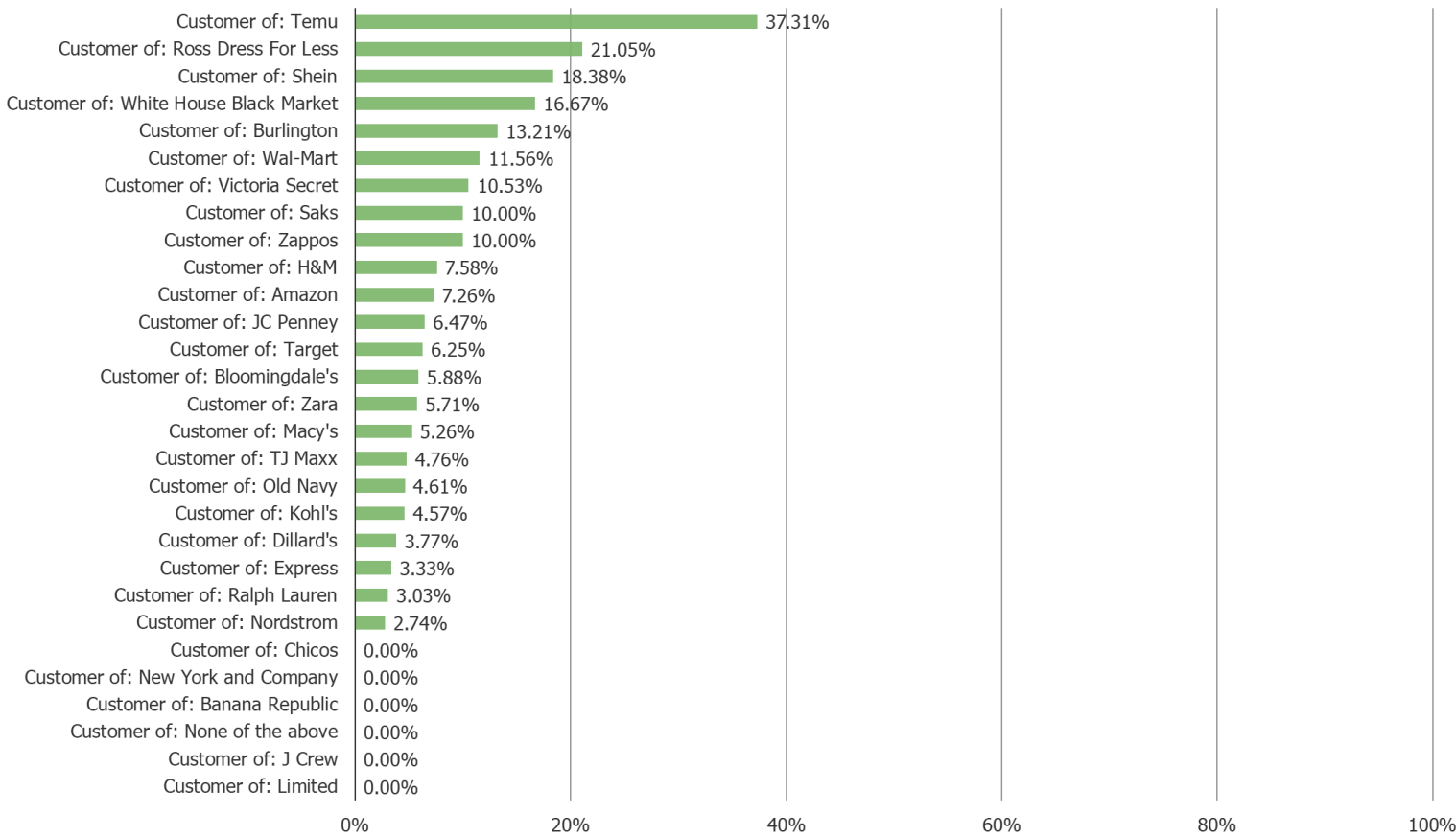


% WOULD INCLUDE SHEIN IN TOP THREE CHOICES IF THEY WERE SHOPPING FOR CLOTHING OR ACCESSORIES TODAY...



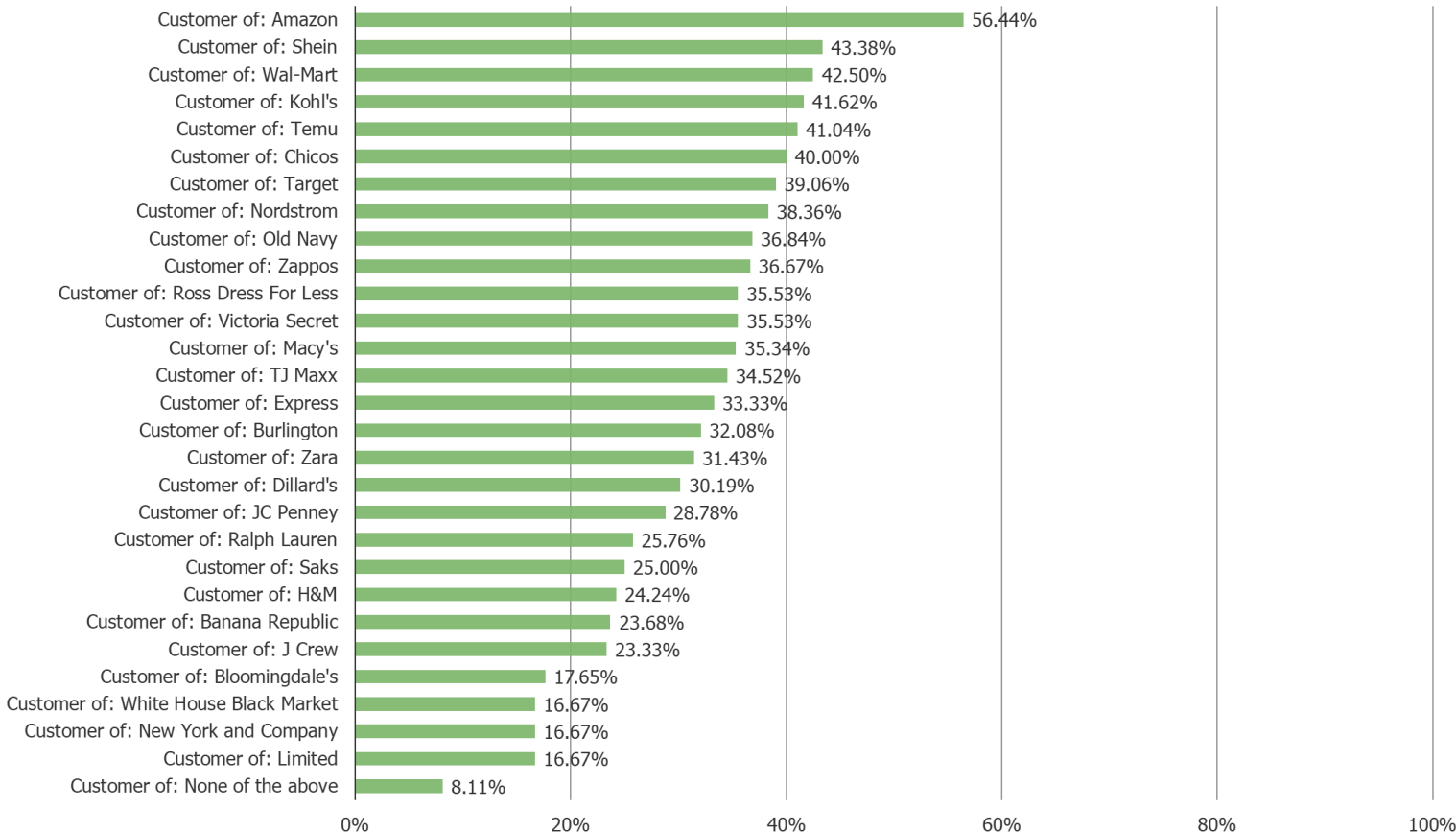
IE – 19.74% of Victoria’s Secret customers would include Shein in their top three if they were searching for clothing and accessories today.

% WOULD INCLUDE TEMU IN TOP THREE CHOICES IF THEY WERE SHOPPING FOR CLOTHING OR ACCESSORIES TODAY...



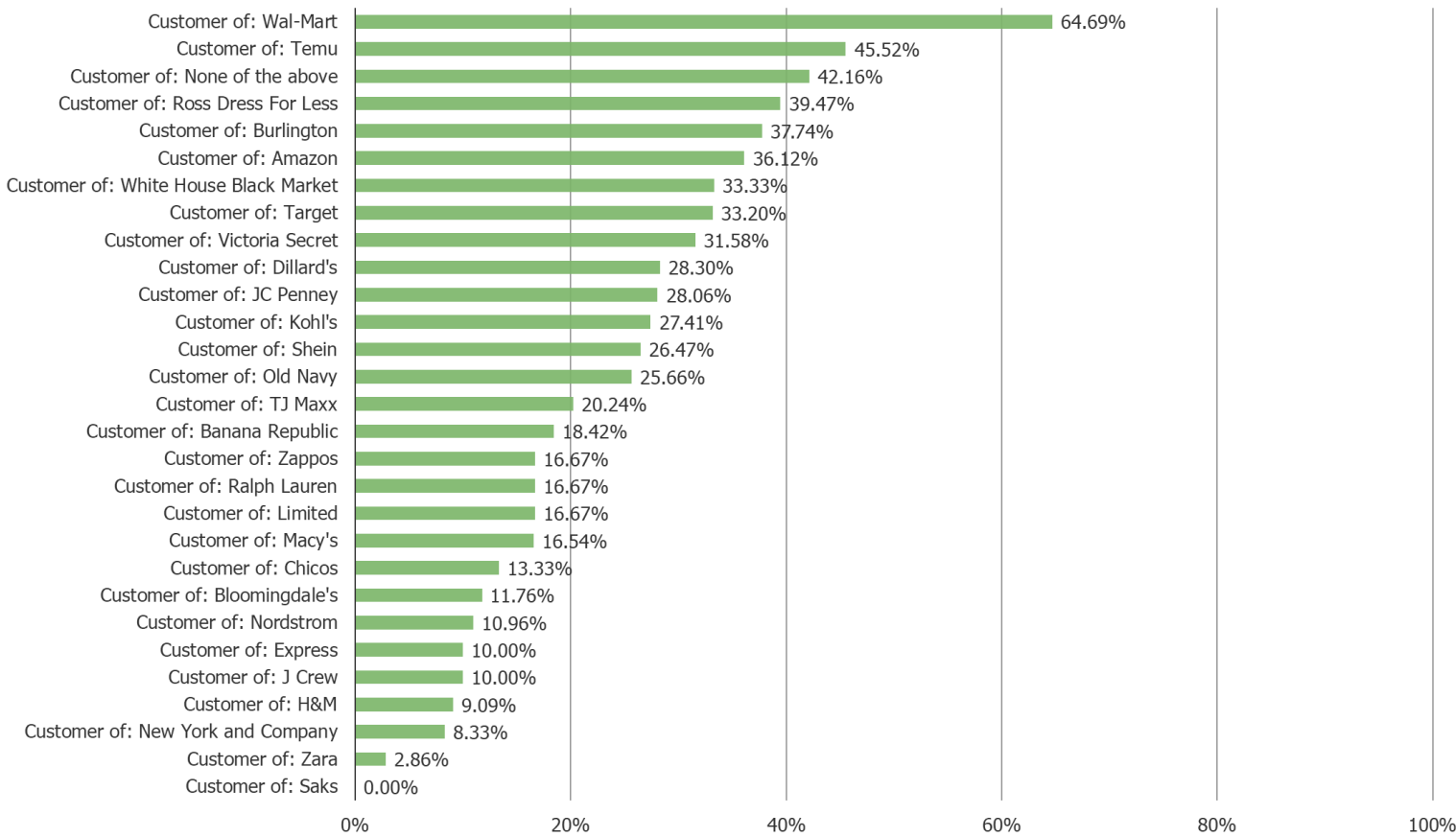
IE – 21.05% of Ross customers would include Temu in their top three if they were searching for clothing and accessories today.

% WOULD INCLUDE **AMAZON IN TOP THREE CHOICES IF THEY WERE SHOPPING FOR CLOTHING OR ACCESSORIES TODAY...**



IE – 41.62% of Kohl's customers would include Amazon in their top three if they were searching for clothing and accessories today.

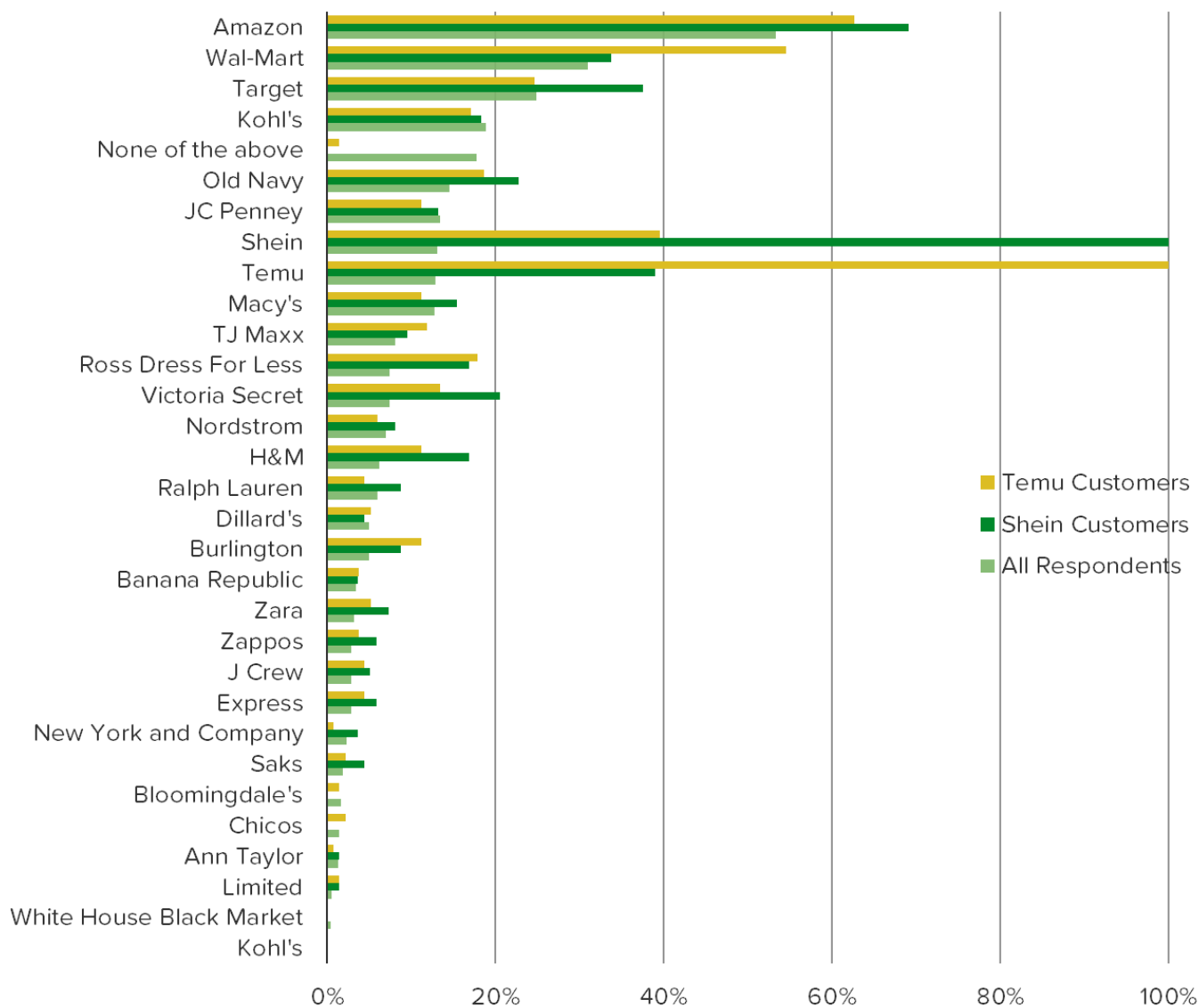
% WOULD INCLUDE AMAZON IN TOP THREE CHOICES IF THEY WERE SHOPPING FOR CLOTHING OR ACCESSORIES TODAY...



IE – 39.47% of Ross customers would include Wal-Mart in their top three if they were searching for clothing and accessories today.

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

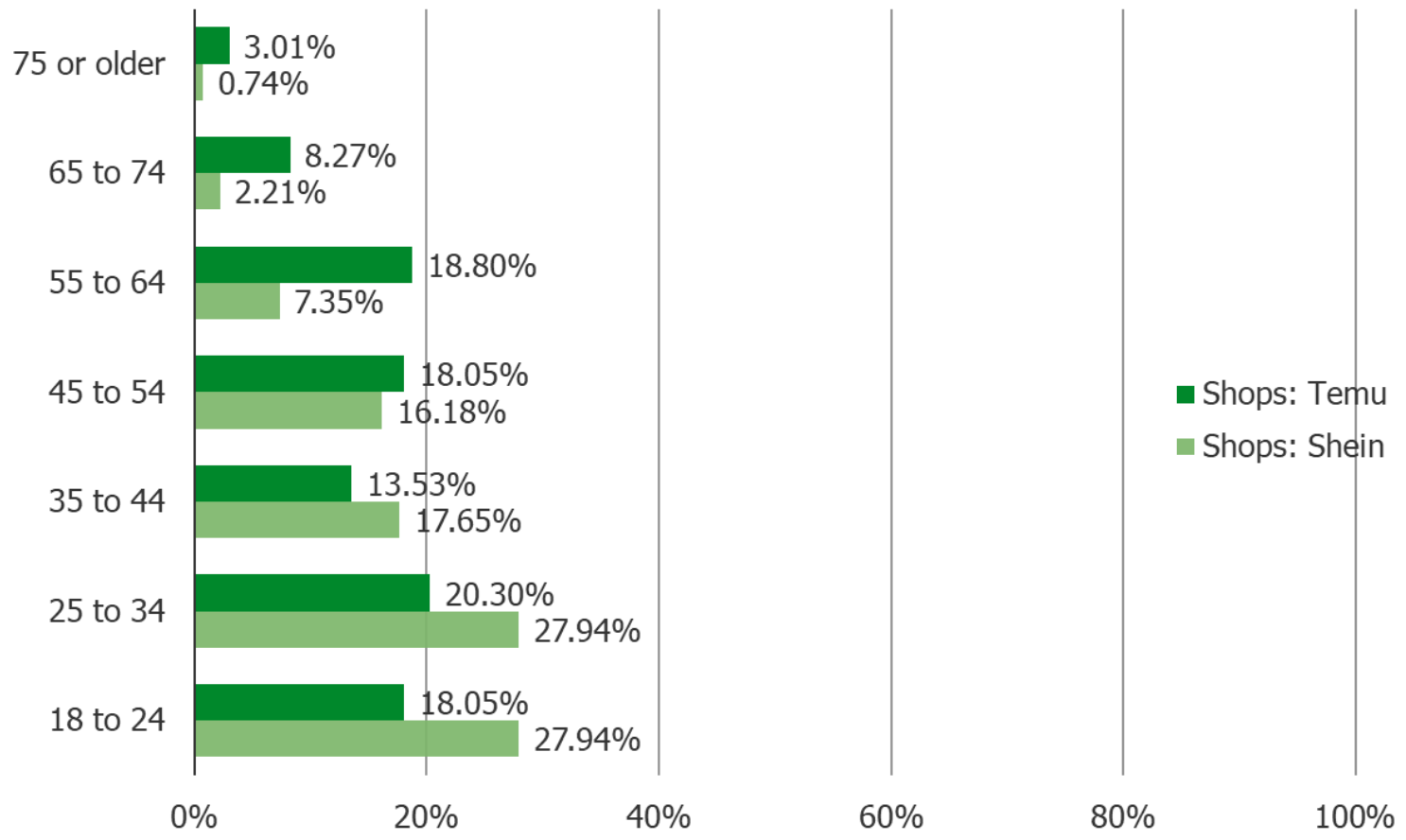
Posed to all consumers.



SHEIN AND TEMU VS. OTHERS

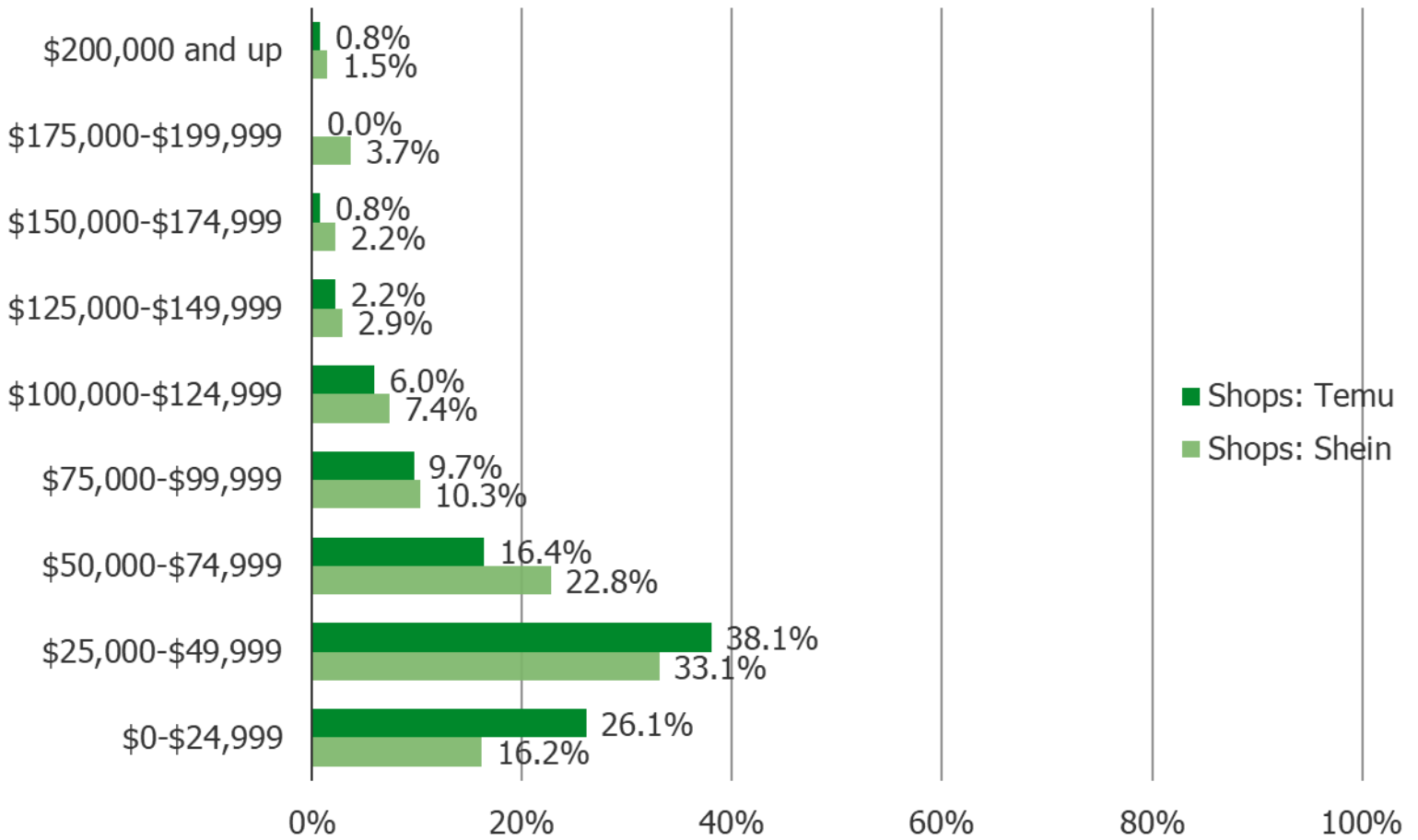
DEMOGRAPHICS, AGE

Posed to all consumers.



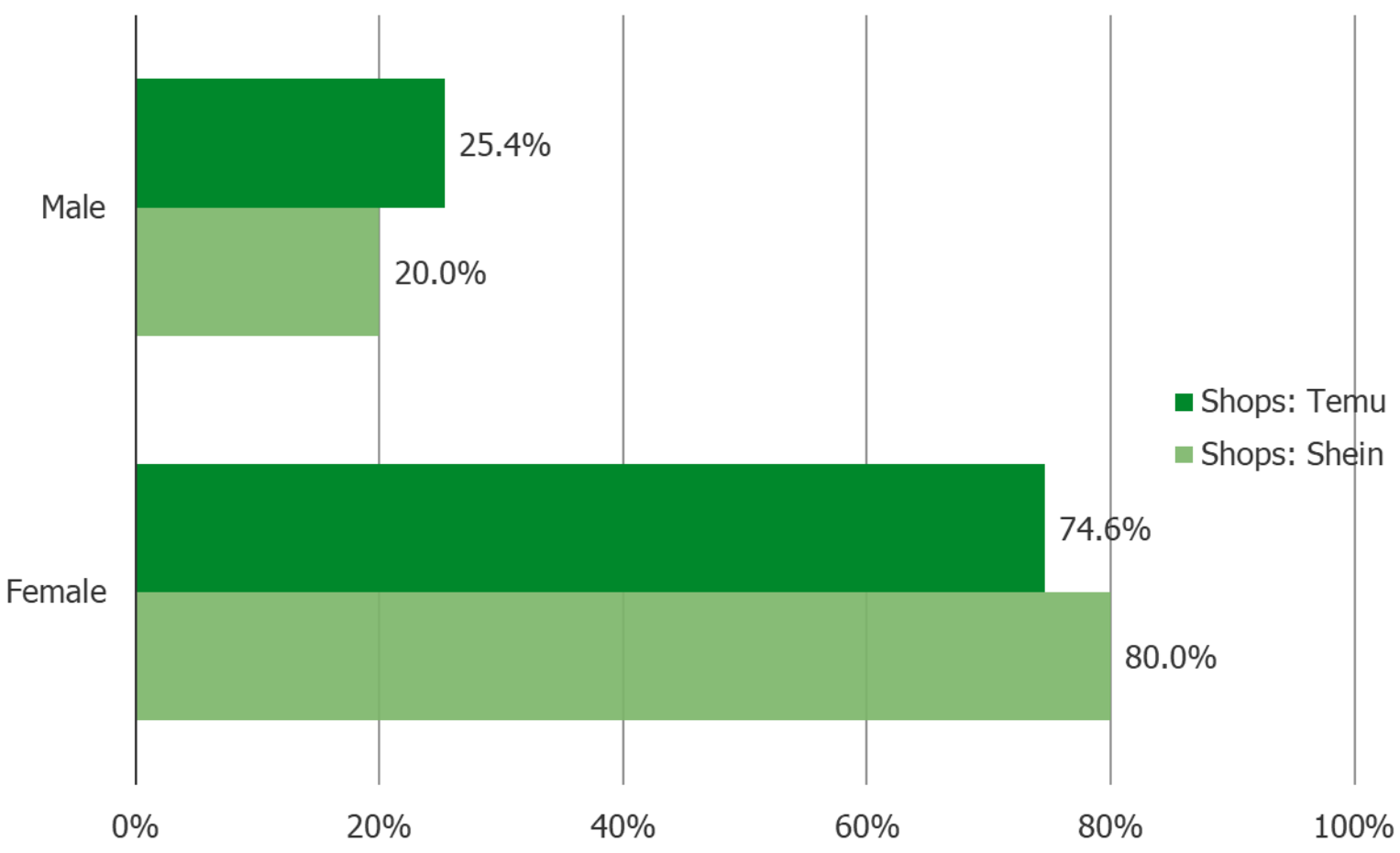
DEMOGRAPHICS, INCOME

Posed to all consumers.



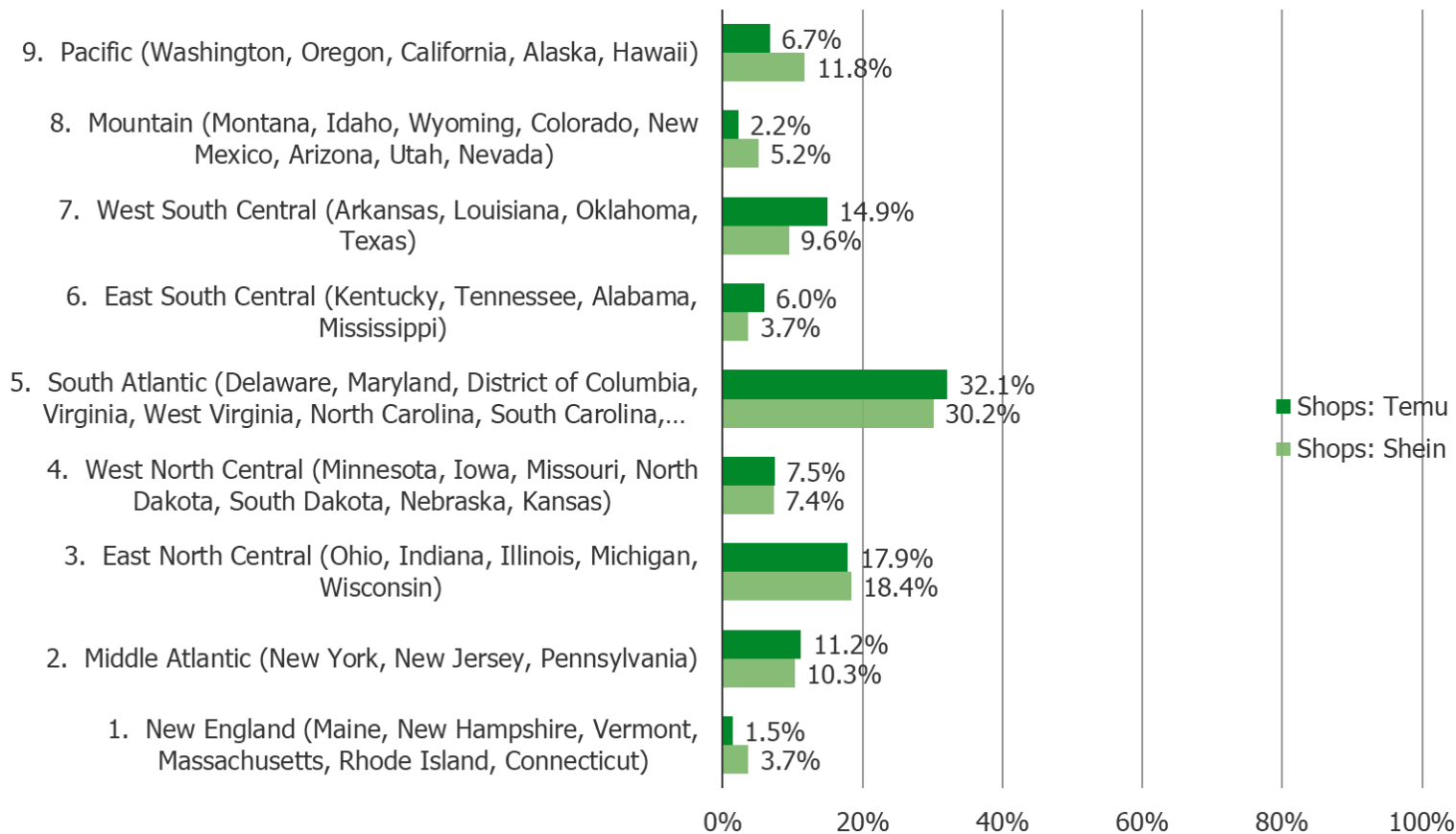
DEMOGRAPHICS, GENDER

Posed to all consumers.



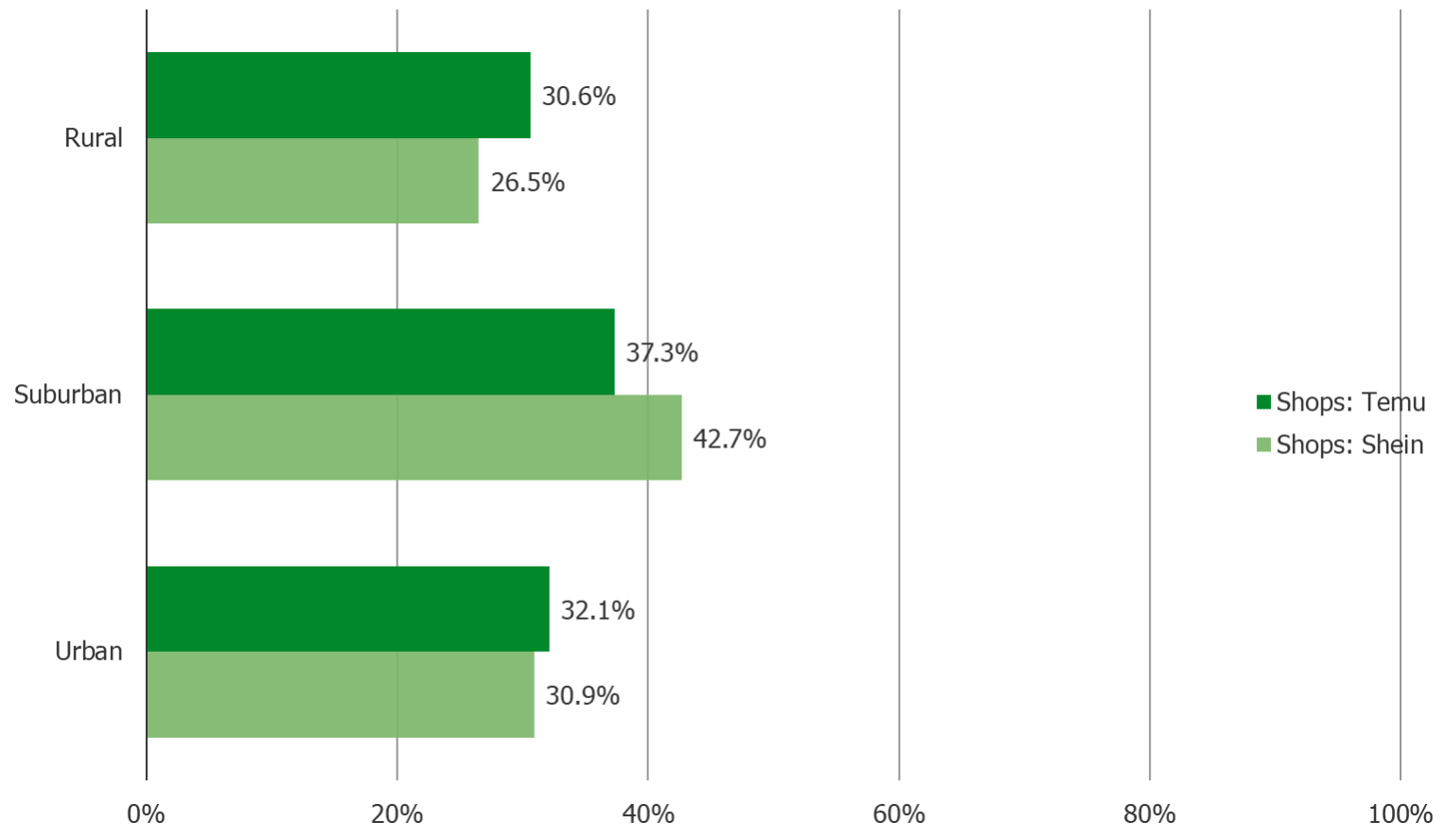
DEMOGRAPHICS, US REGION

Posed to all consumers.



DEMOGRAPHICS, LIVING AREA

Posed to all consumers.



DEMOGRAPHICS, CHILDREN

Posed to all consumers.

