

# Bespoke Survey Research

August 2024

## Department Stores

Volume 35 | Quarterly Survey

1,000 US Consumers Balanced To Census

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

### Key Takeaways:

1. The share who would turn to either Shein or Temu if they were shopping for clothing today has increased q/q and stands at series highs.
2. Consumers continue to strongly like the treasure hunt shopping experience (and continue to show a preference for shopping in-stores vs. online when shopping off price retailers).
3. Customer feedback is net positive related to brand/product selection and promotional offers at department stores in our survey. Feedback improved q/q, but is lower than series highs set 1-2 years ago.
4. Feedback related to spending volume and recent/expected visit frequency was actually in-line to slightly better q/q, but the overall trend across multiple recent quarters has been one of softening.
5. In addition to Amazon, Temu, Shein, and Wal-Mart were increasingly pointed to as the top popularity gainers (according to respondents).

### Noteworthy Stats:

**54.0%** Of respondents like to strongly like the treasure hunt shopping experience.

**32.8%** Of respondents would turn to Amazon if they were shopping for clothing today.

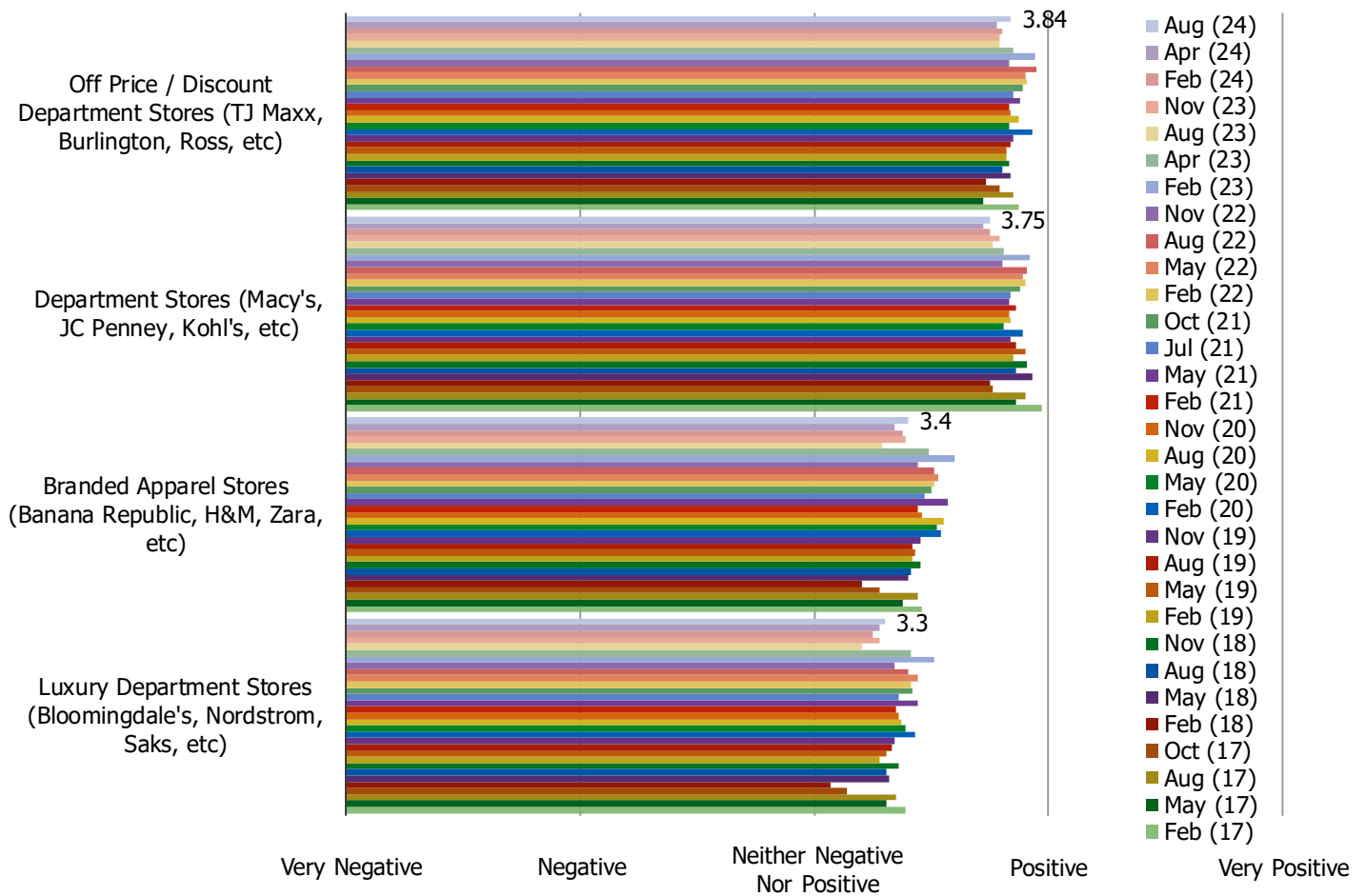
**9.3%** Of respondents would turn to Shein if they were shopping for clothing today.

**8.7%** 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

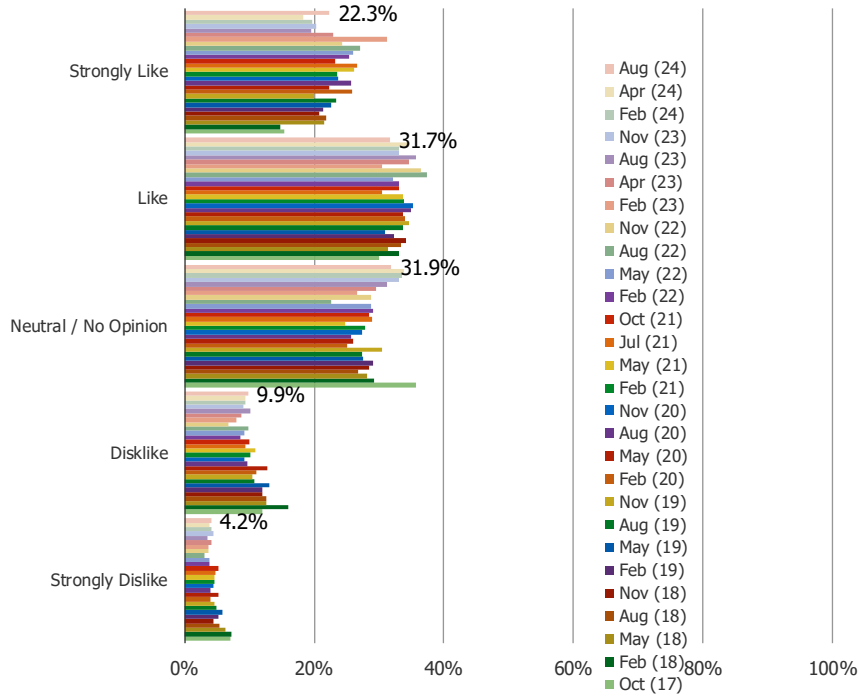
Posed to all consumers.



## TREASURE HUNT SHOPPING EXPERIENCE

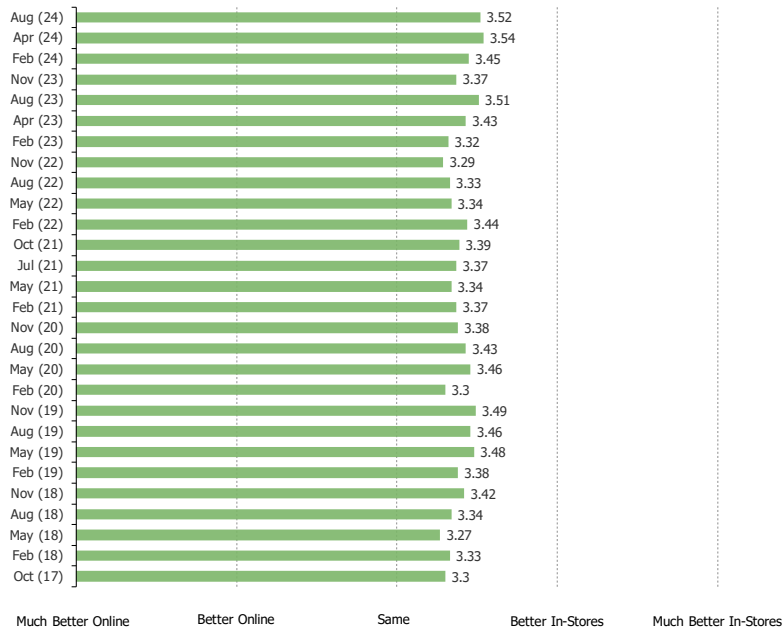
DO YOU LIKE THE TREASURE HUNT TYPE OF SHOPPING EXPERIENCE WHERE BRANDS/PRODUCTS AVAILABLE AT A DISCOUNTED PRICE CHANGE OFTEN?

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.



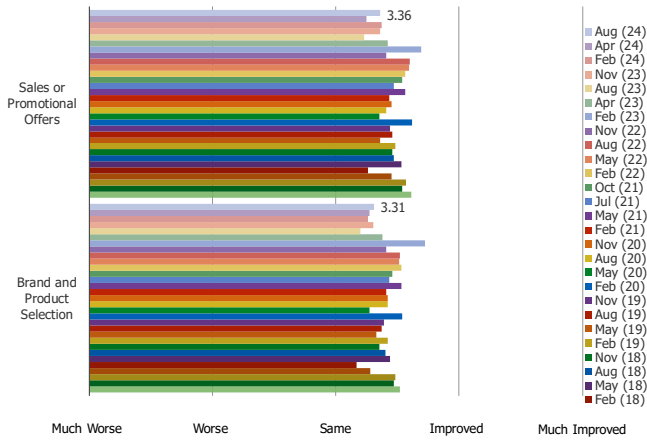
## DEPARTMENT STORE DEEP DIVES (COMPARISONS)

### PRODUCT SELECTIONS

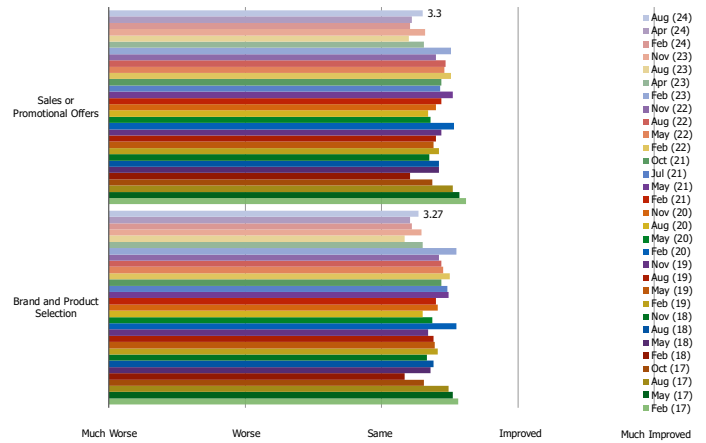
HAVE YOU NOTICED ANY CHANGES IN THE FOLLOWING WHILE SHOPPING AT \_\_\_\_\_?

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

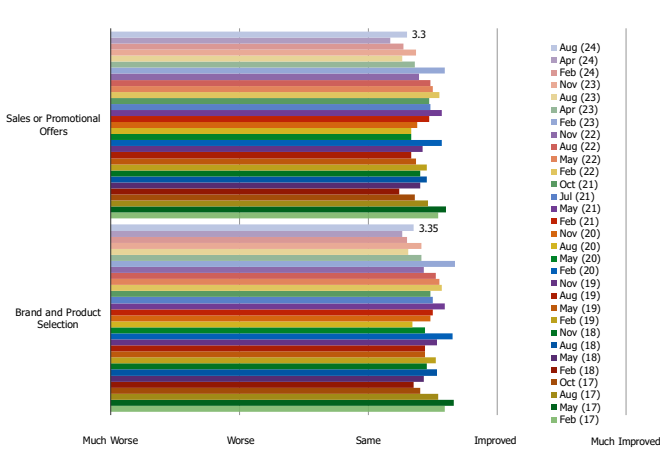
Macy's



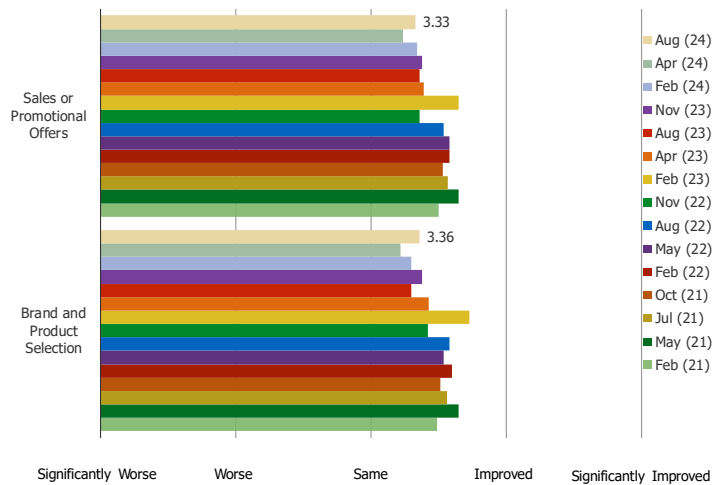
Kohl's



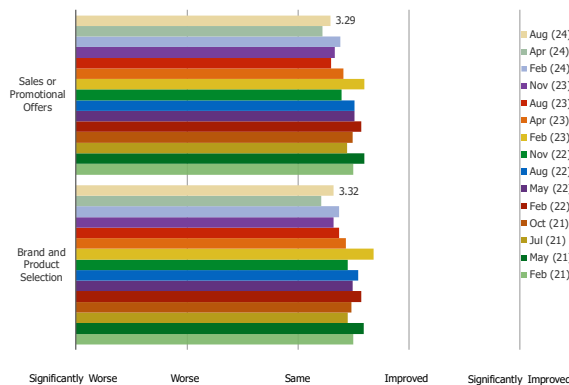
TJ Maxx



Burlington



Ross



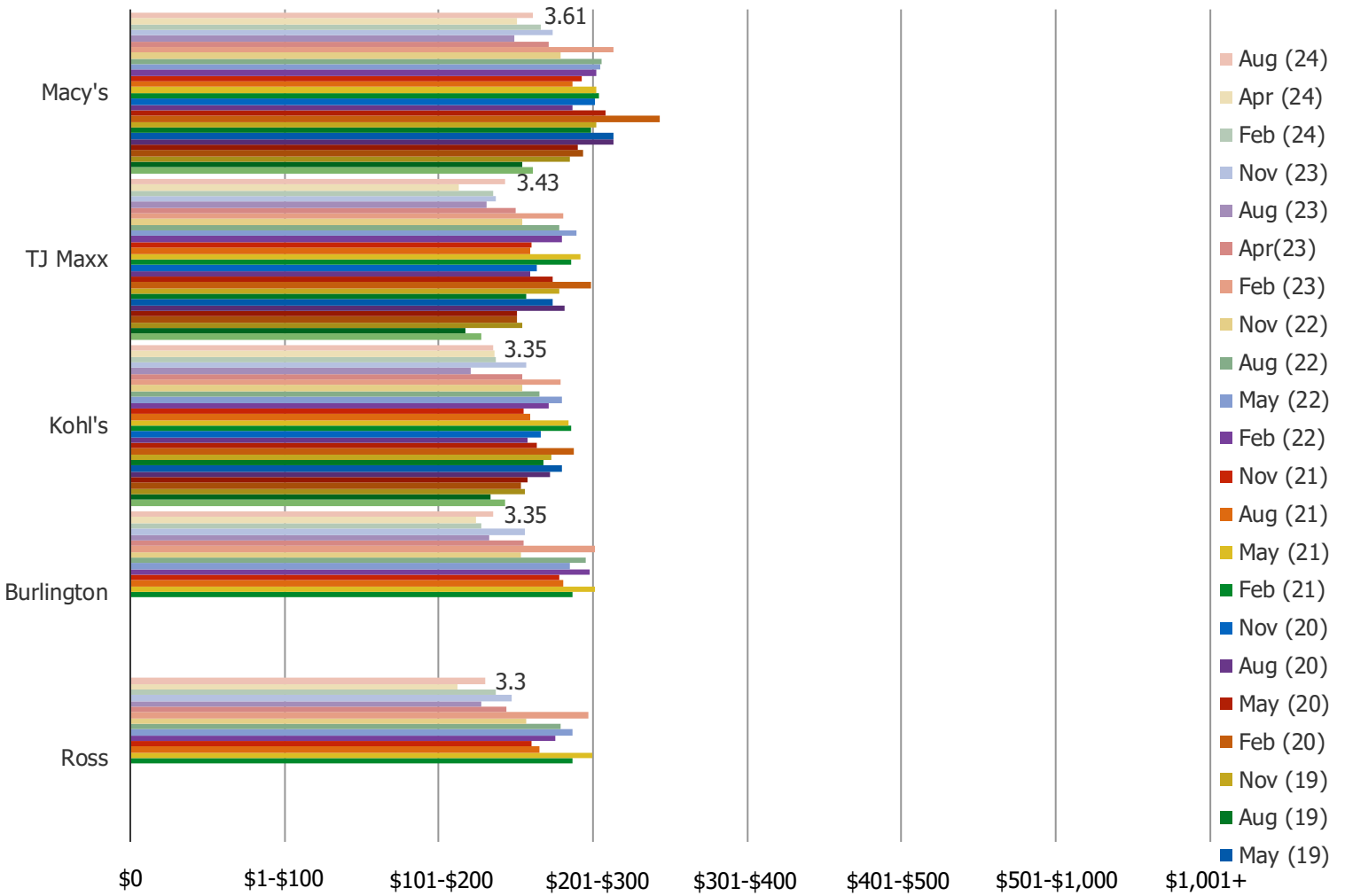
## ENGAGEMENT DEEP DIVES

### AMONG ACTIVE CUSTOMERS (PURCHASED IN THE PAST YEAR)



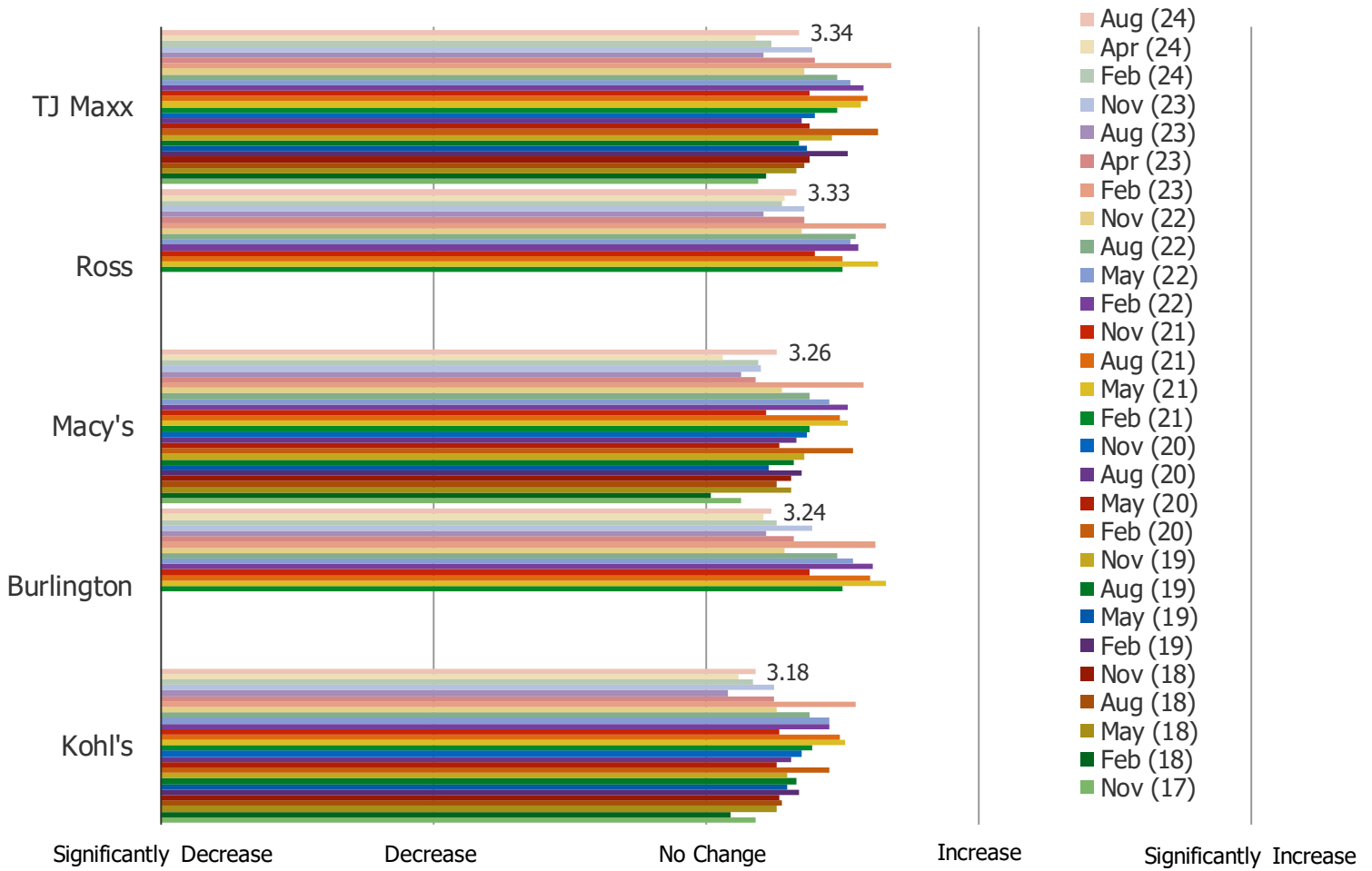
HOW MUCH HAVE YOU SPENT THROUGH \_\_\_\_\_ IN THE PAST SIX MONTHS?

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



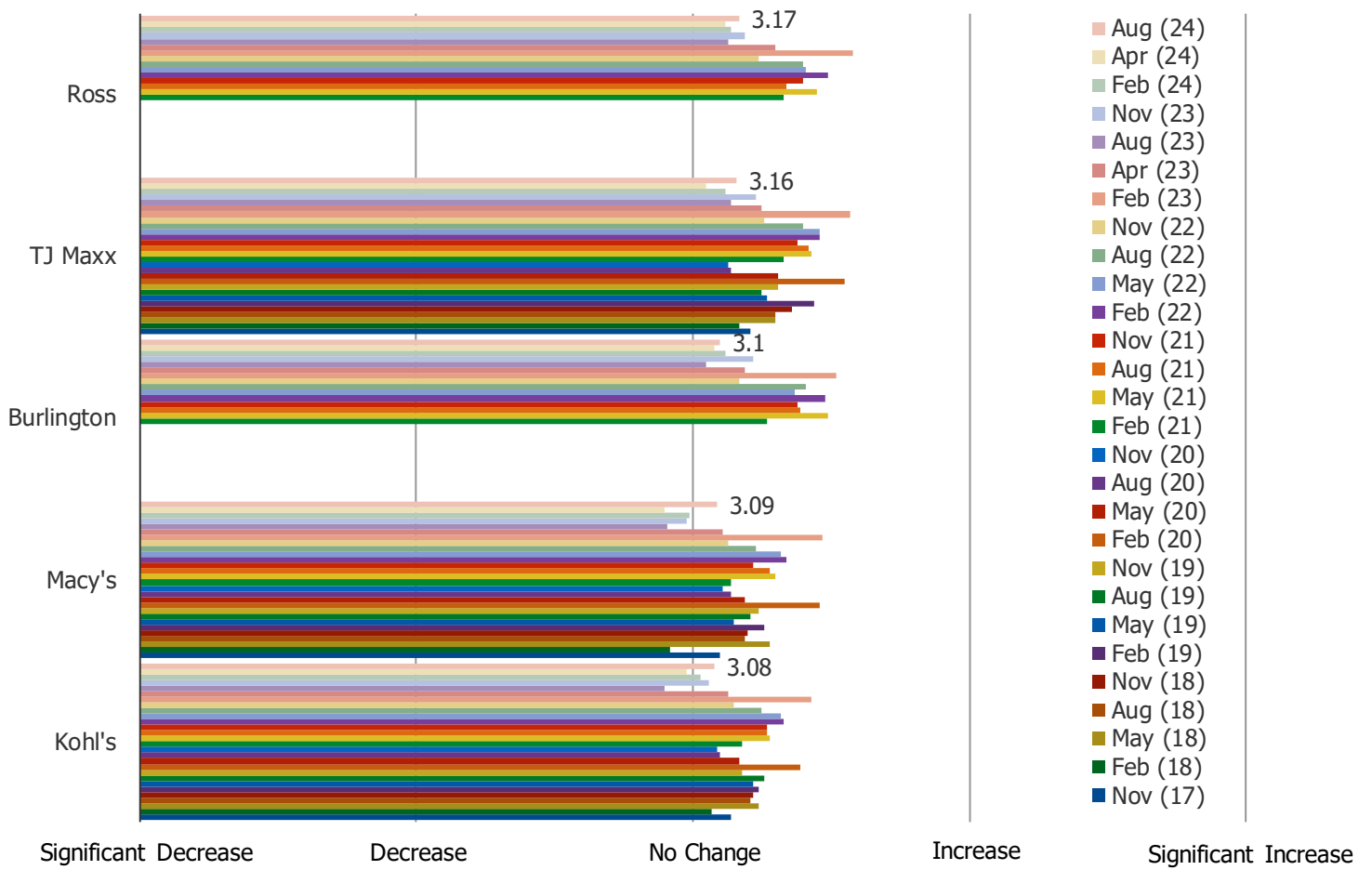
GOING FORWARD, DO YOU EXPECT TO CHANGE HOW MUCH YOU SHOP \_\_\_\_\_?

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



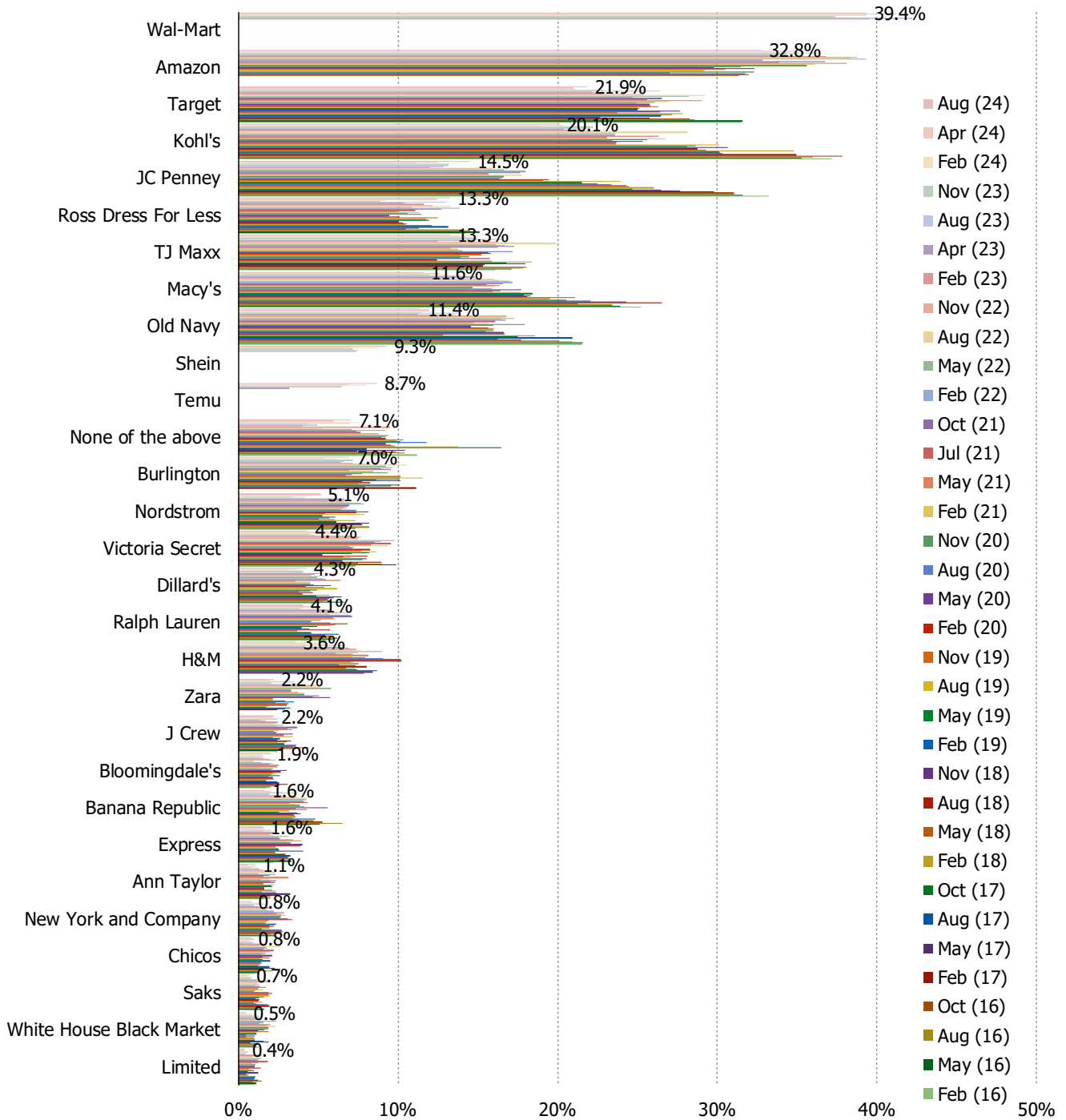
HAS YOUR SHOPPING OF \_\_\_\_\_ CHANGED COMPARED TO A YEAR AGO?

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



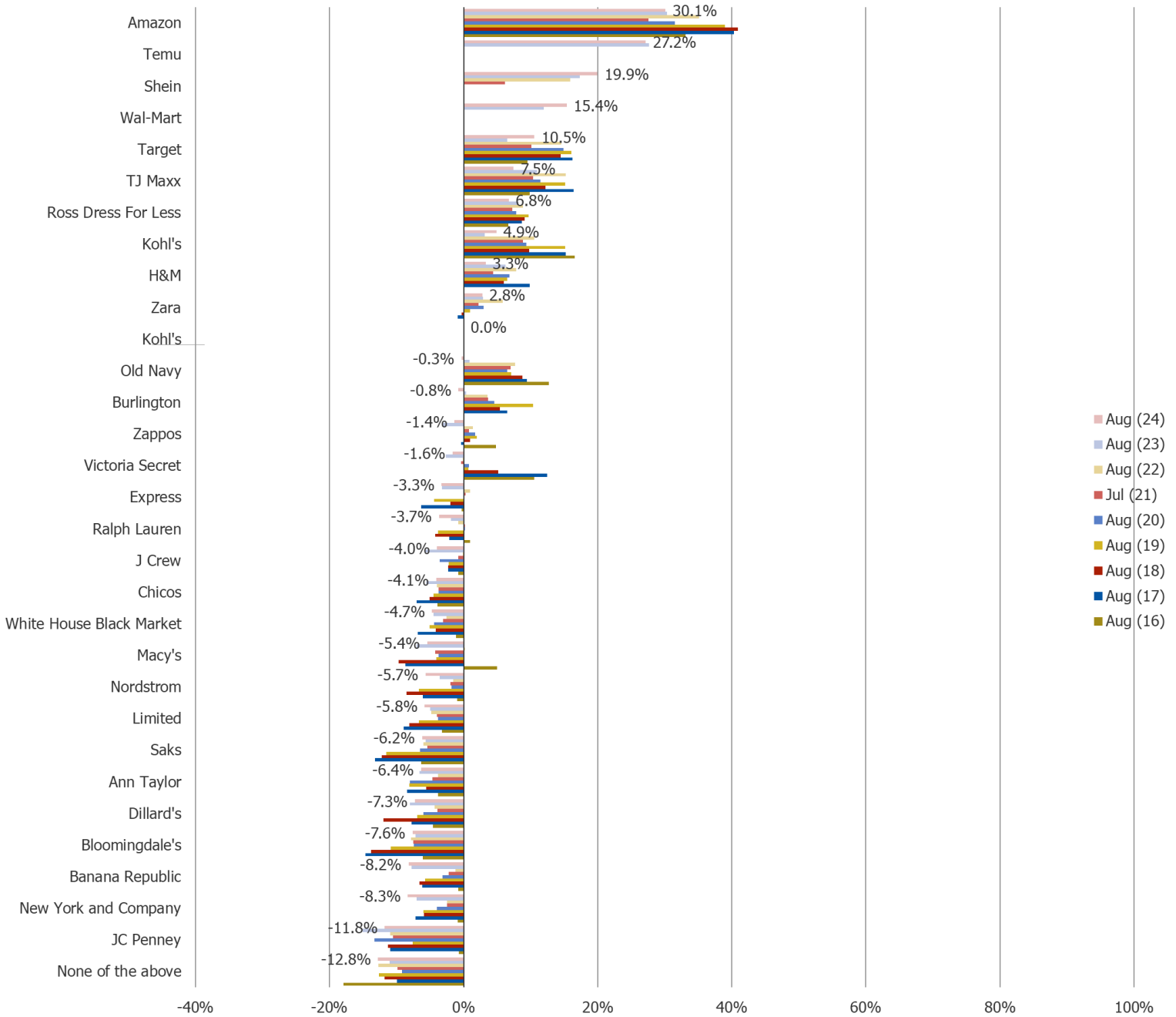
IF YOU WERE SHOPPING FOR CLOTHING FOR YOURSELF TODAY, WHICH WOULD YOU BE MOST LIKELY TO VISIT?

Posed to all consumers.



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

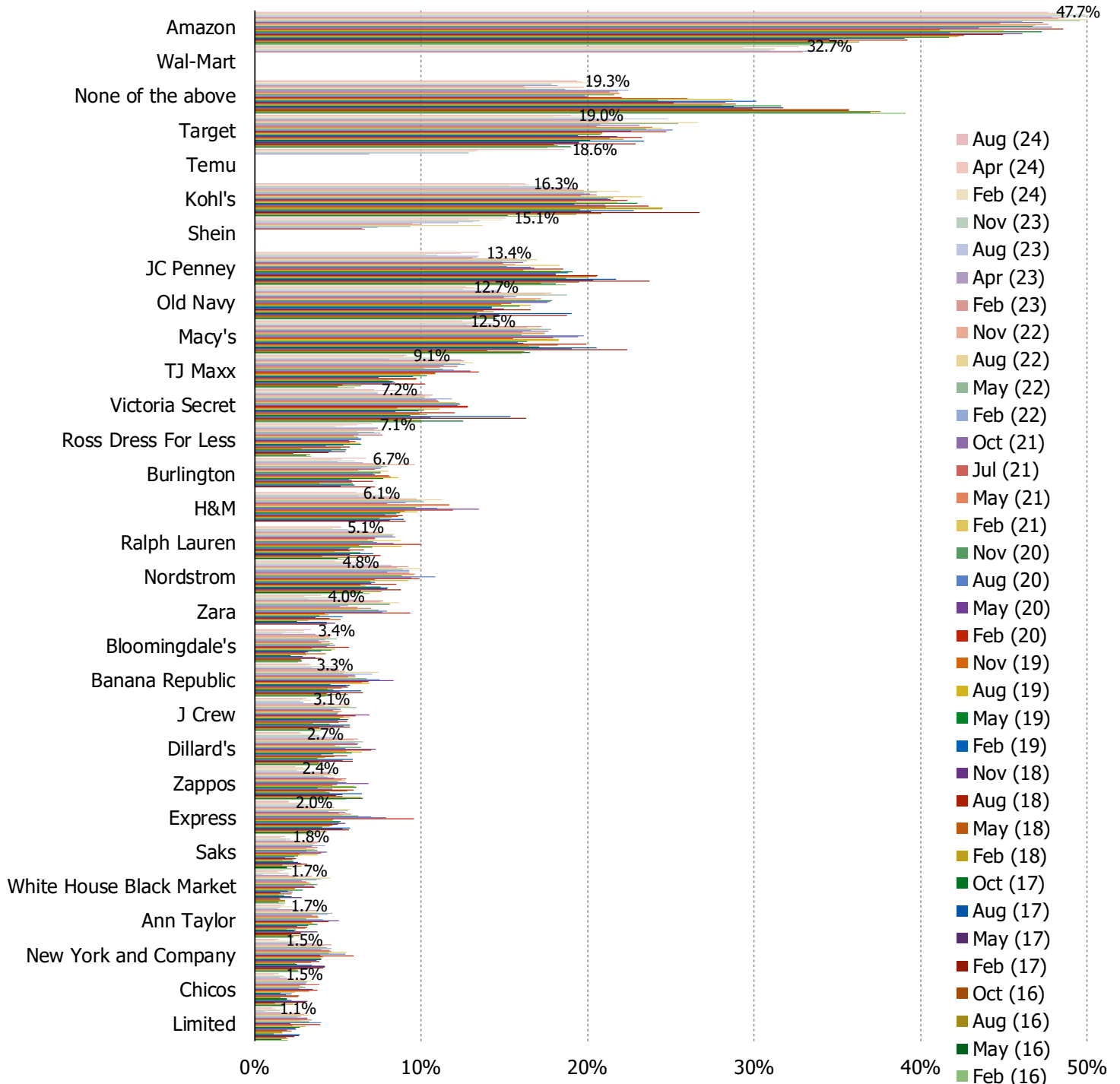
Posed to all consumers.





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

Posed to all consumers.

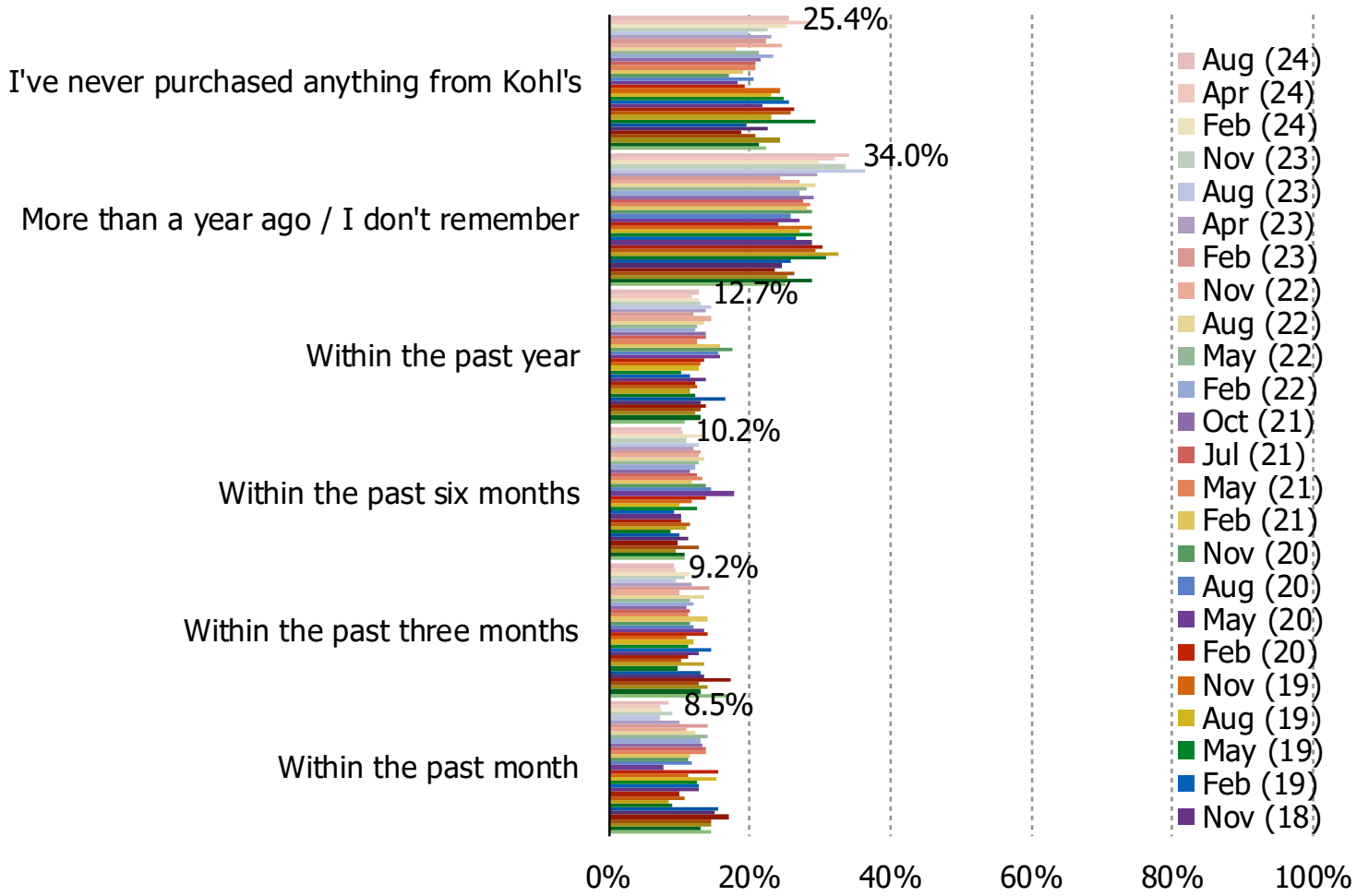


## DEPARTMENT STORE DEEP DIVES: KOHL'S



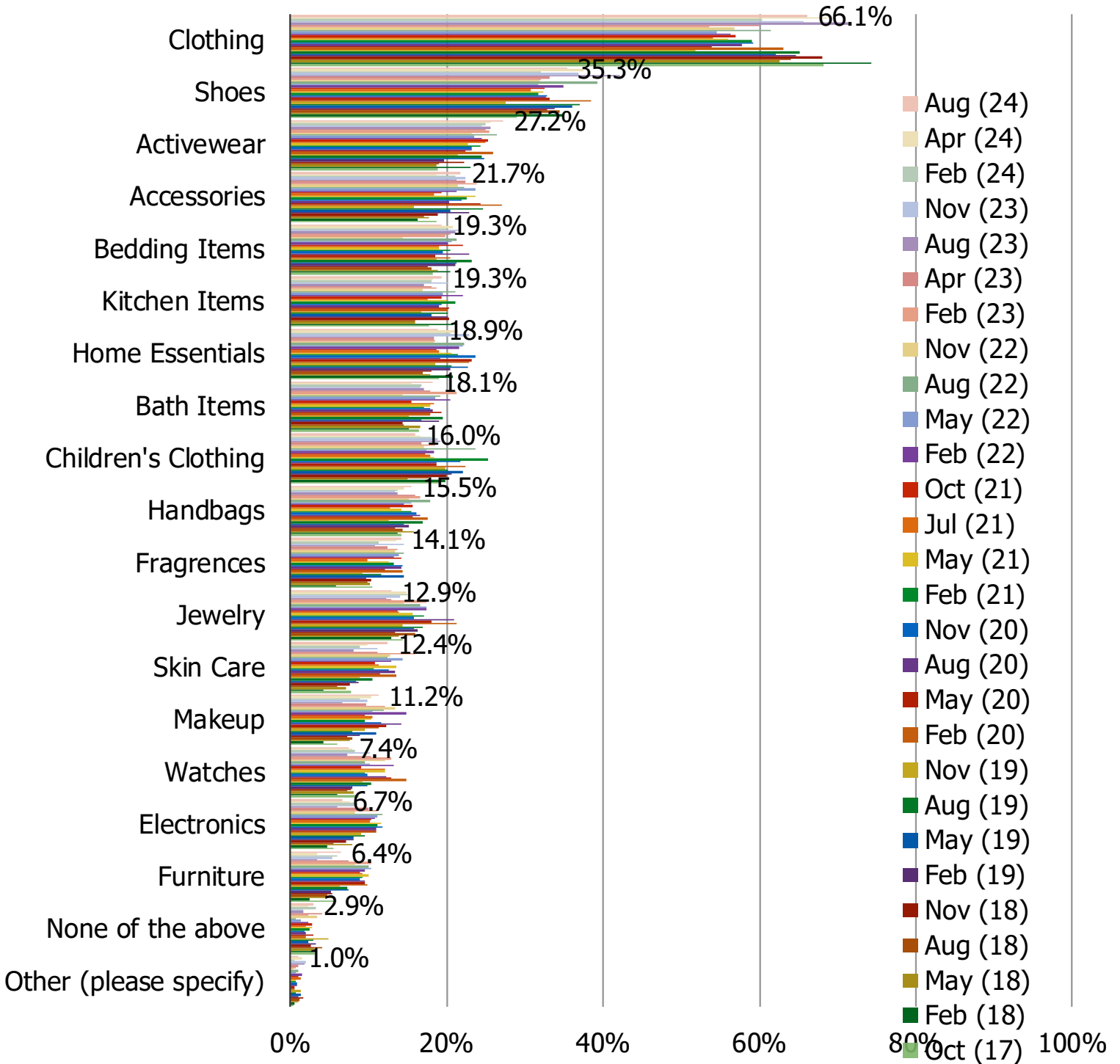
WHEN IS THE LAST TIME YOU PURCHASED SOMETHING FROM KOHL'S?

Posed to all consumers.



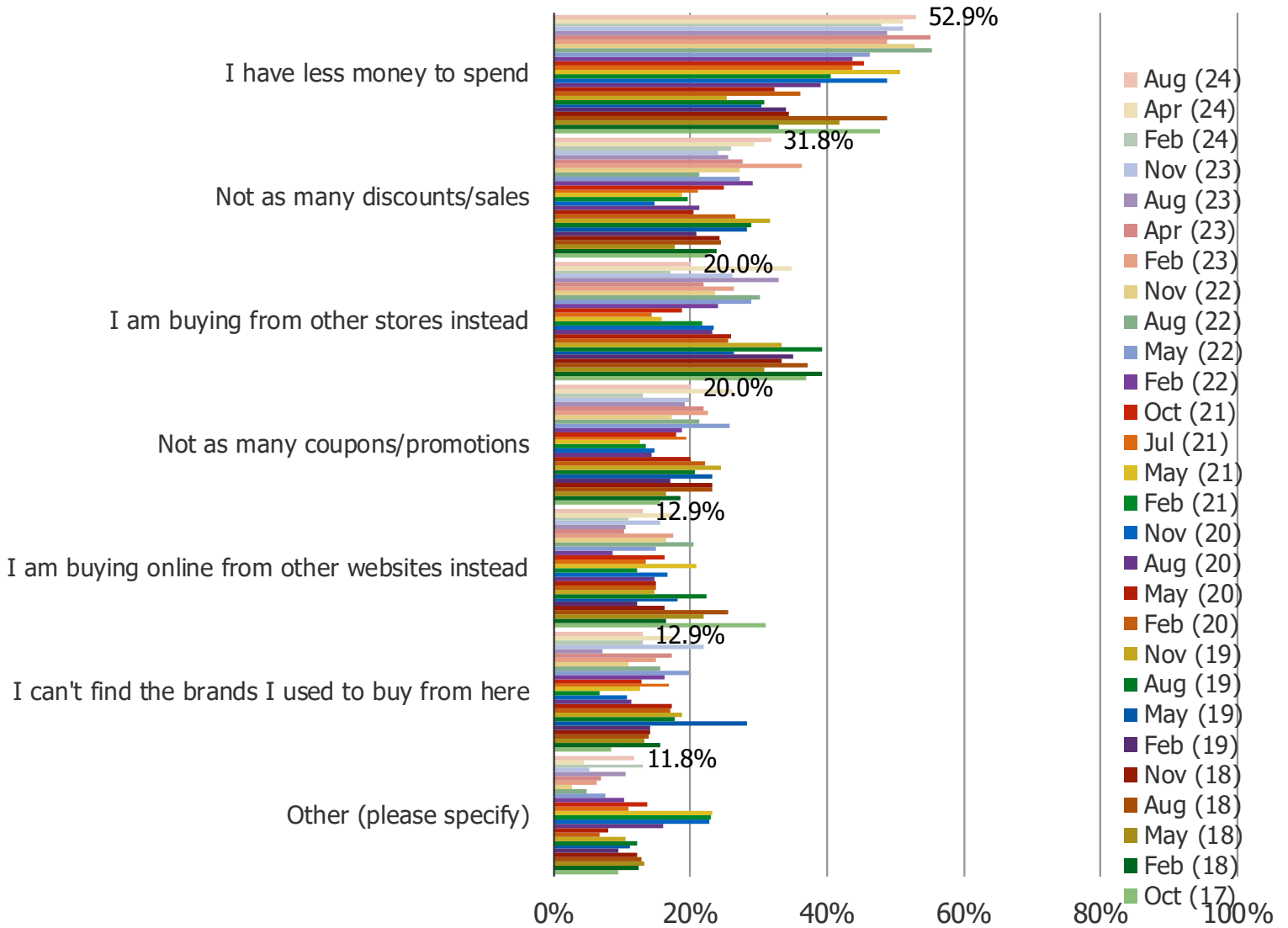
WHAT TYPE OF ITEMS DO YOU TYPICALLY BUY FROM KOHL'S?

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



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

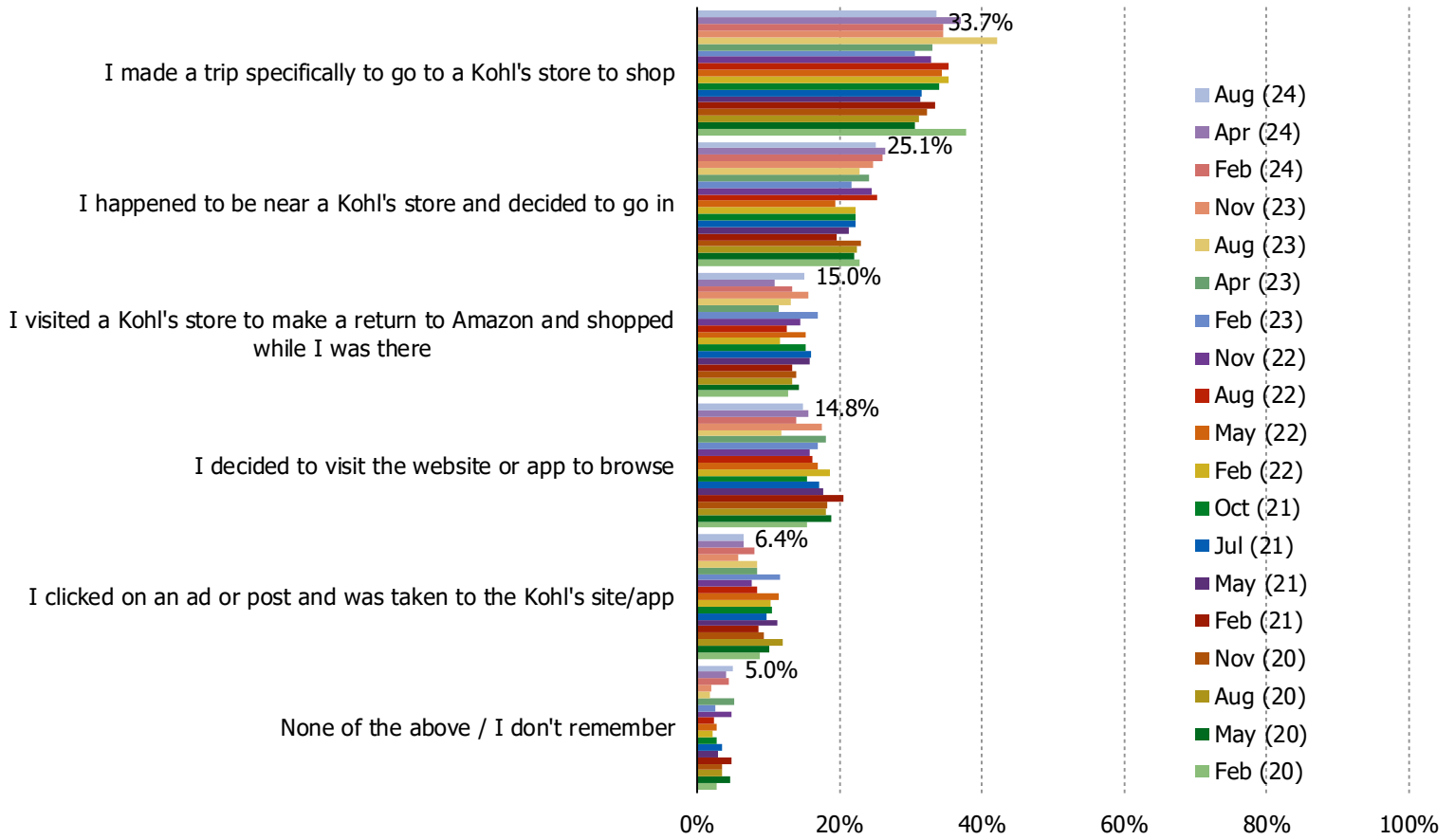
Posed to all consumers who purchased from Kohl's in the past year, but said they are shopping it less compared to a year ago.



## KOHL'S AND AMAZON RETURNS

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

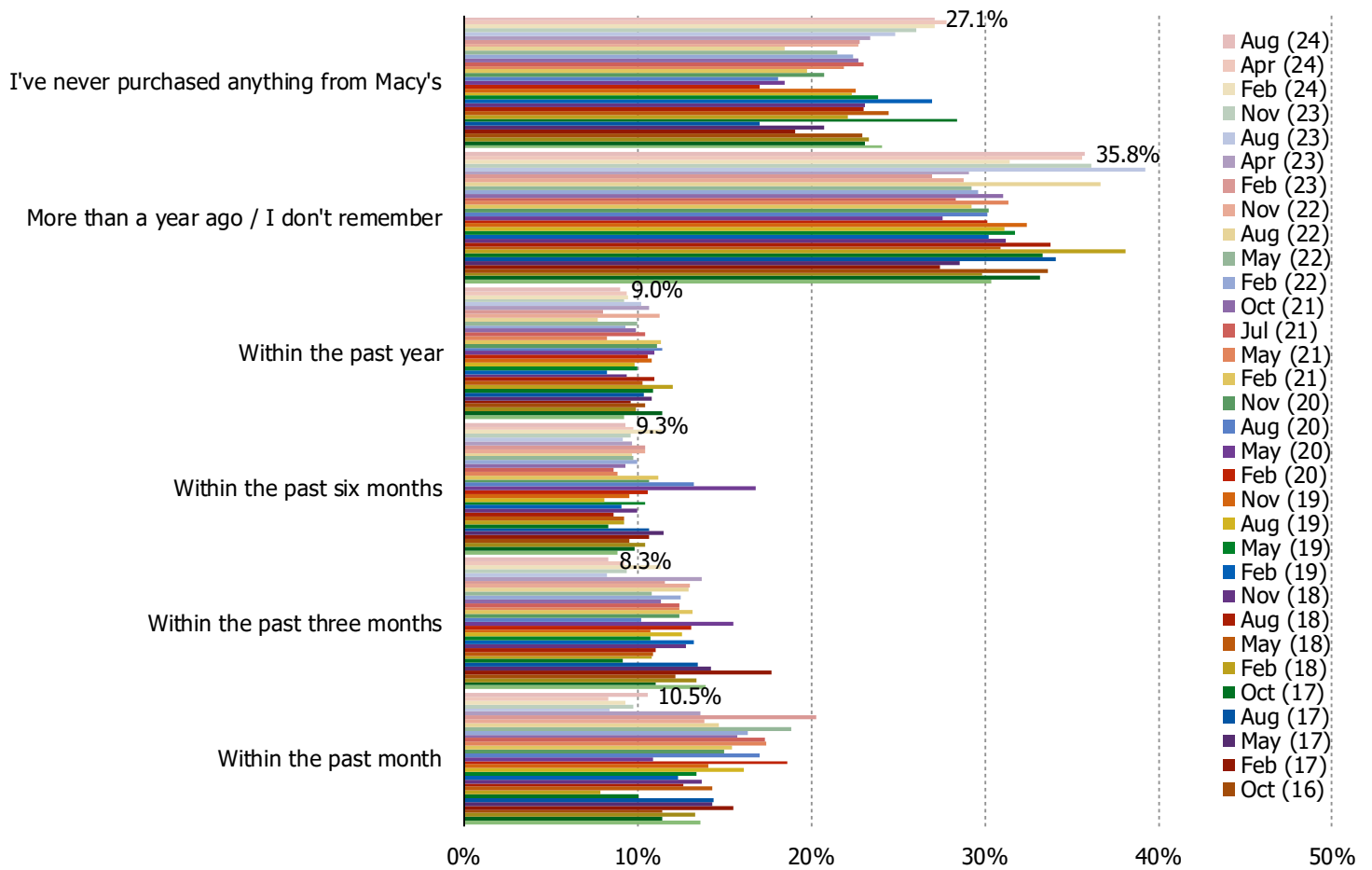
Posed respondents who shopped Kohl's in the past three months



## DEPARTMENT STORES DEEP DIVE: MACY'S

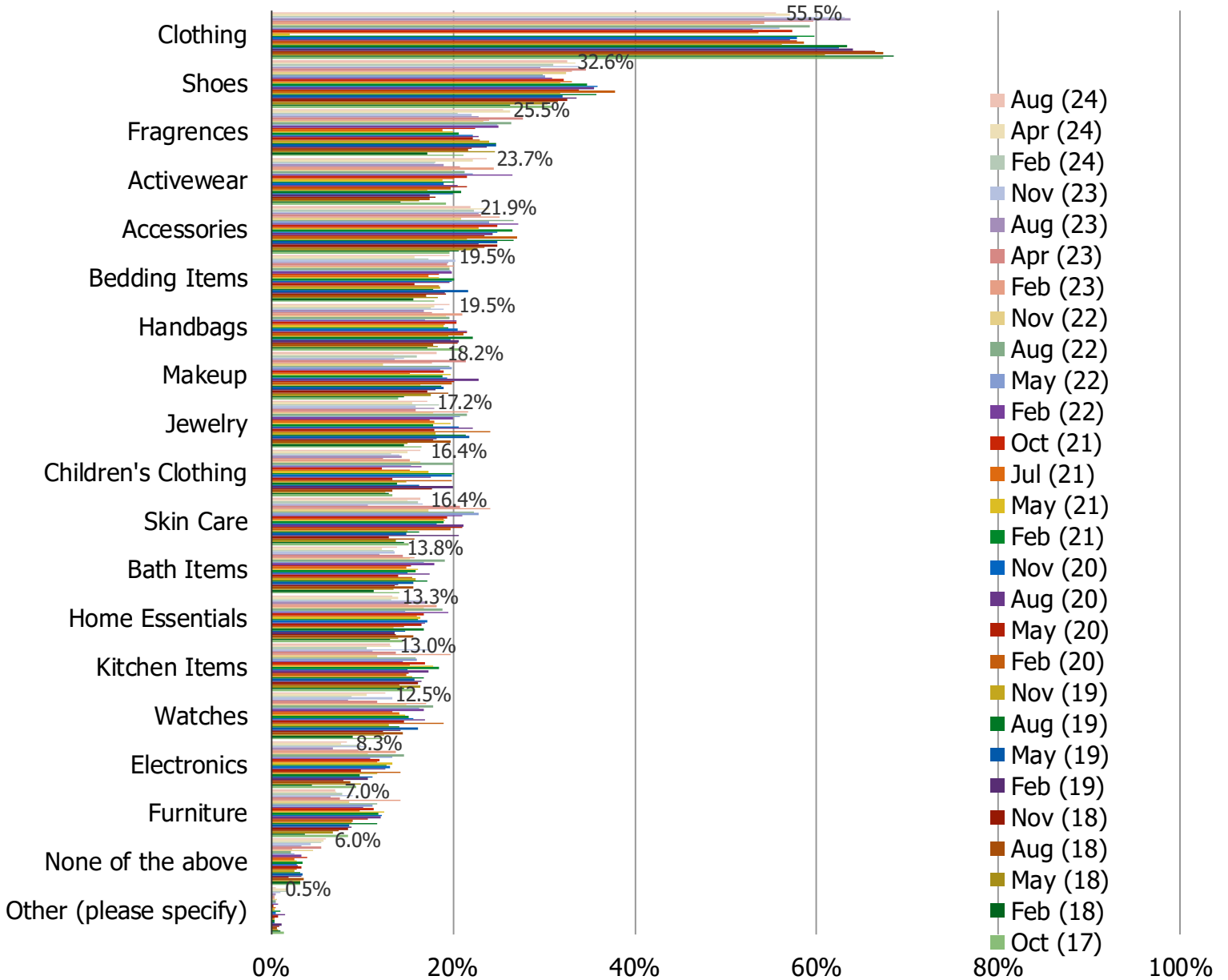
WHEN IS THE LAST TIME YOU PURCHASED SOMETHING FROM MACY'S?

Posed to all consumers.



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

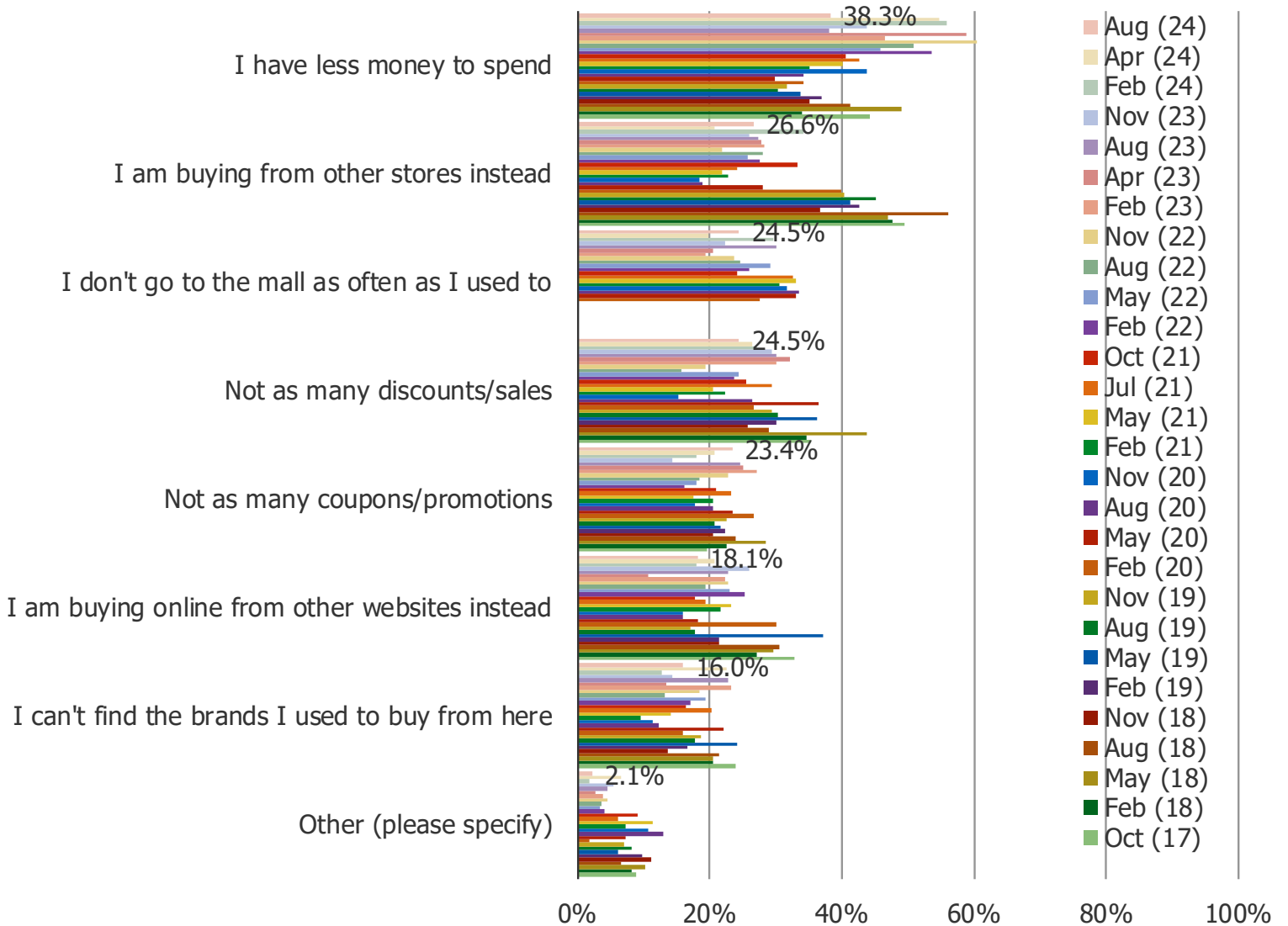
Posed to all consumers who purchased from Macy's in the past year.





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

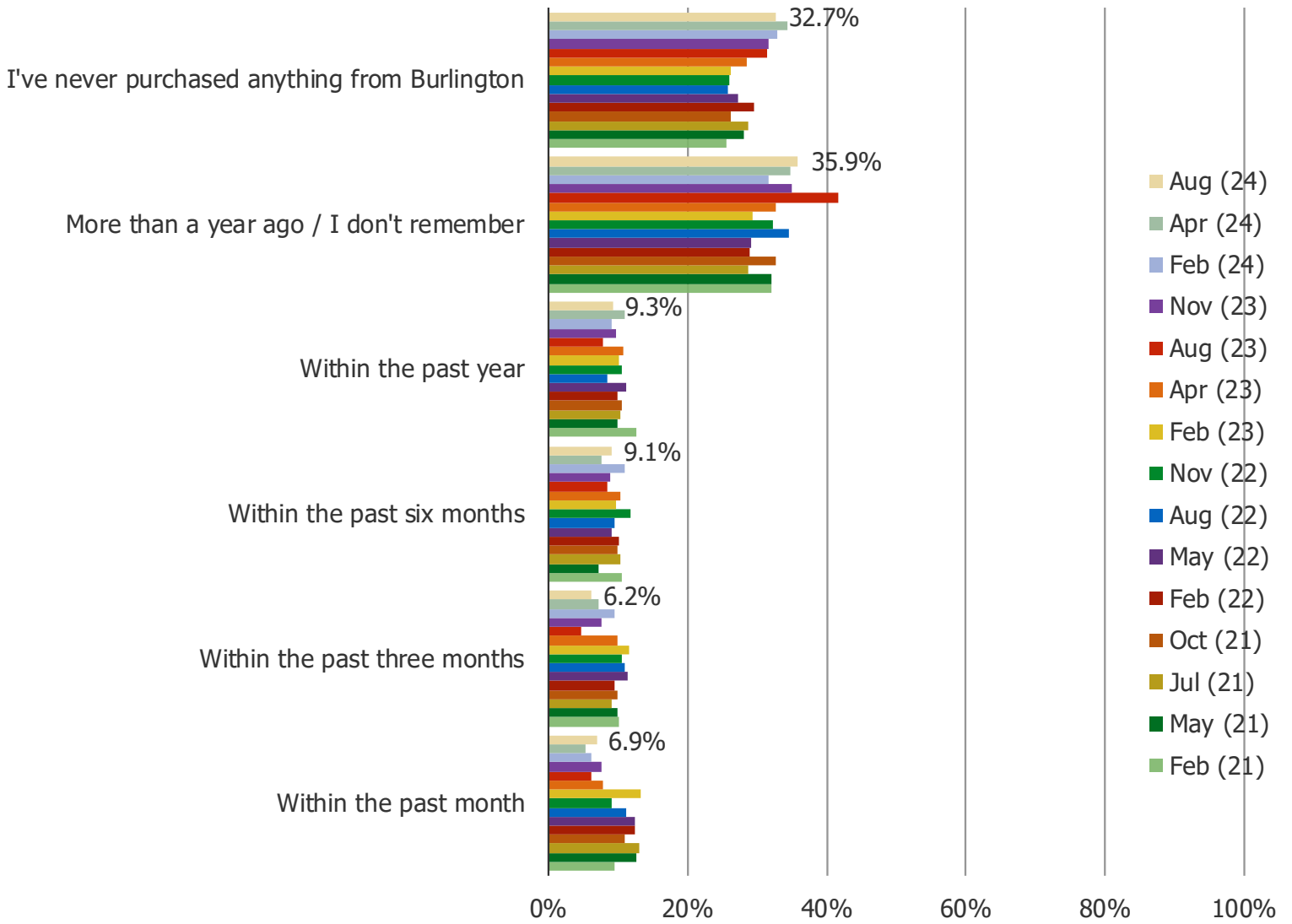
Posed to all consumers who purchased from Macy's in the past year, but said they are shopping it less compared to a year ago.



## DEPARTMENT STORES DEEP DIVES: BURLINGTON

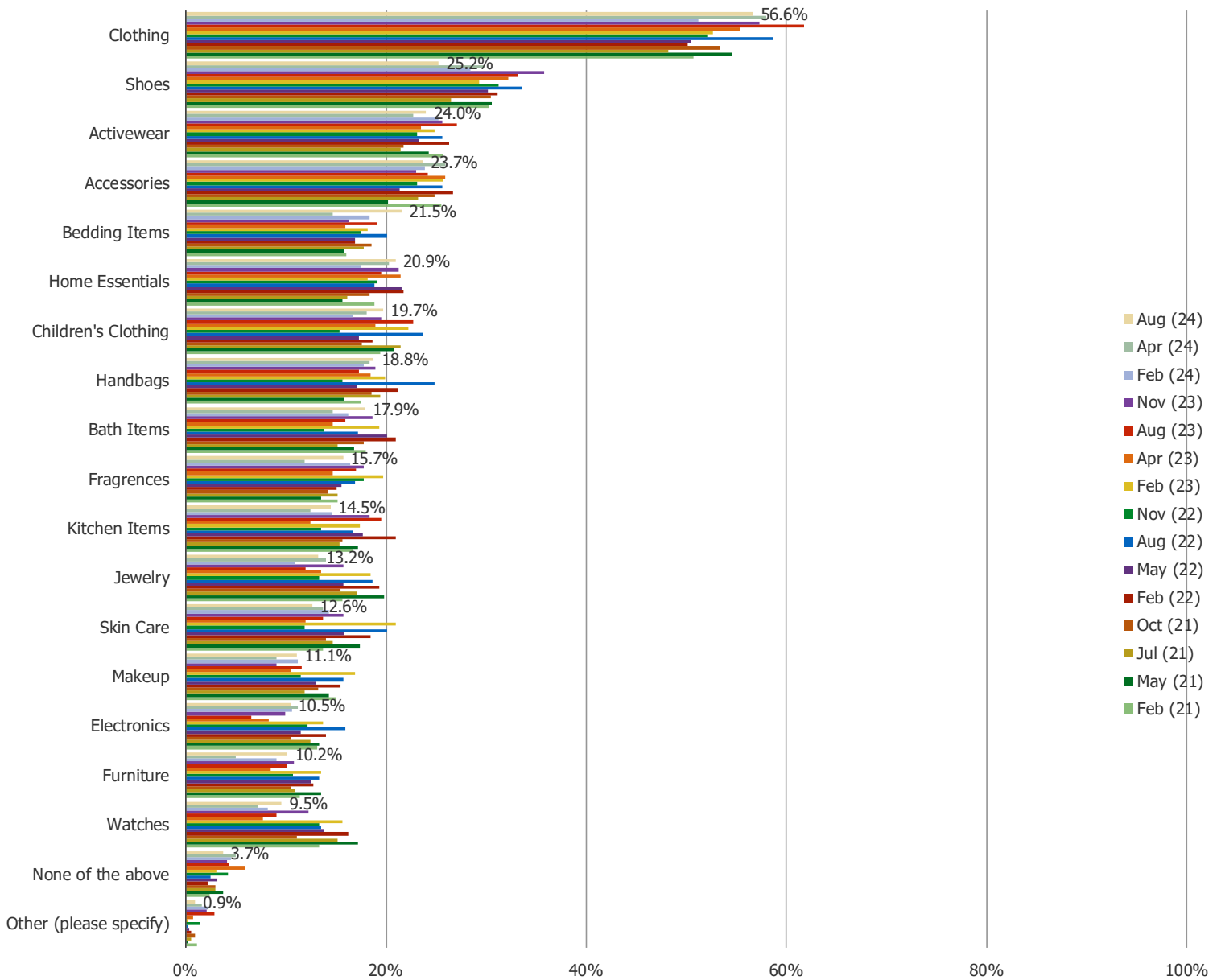
WHEN IS THE LAST TIME THAT YOU BOUGHT CLOTHING OR ACCESSORIES FOR YOURSELF FROM BURLINGTON?

Posed to all consumers.



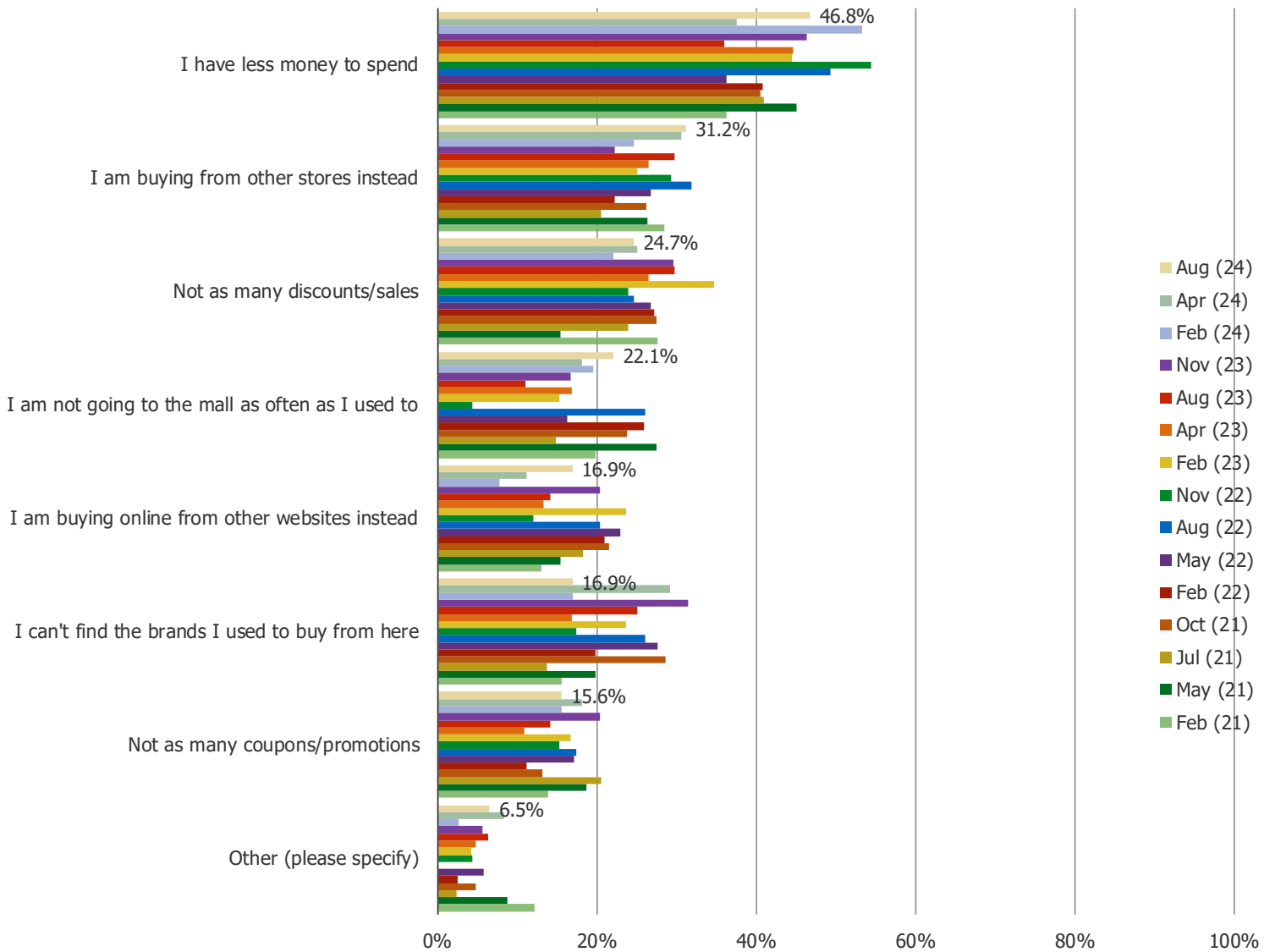
WHAT TYPES OF ITEMS DO YOU TYPICALLY BUY FROM BURLINGTON?

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



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

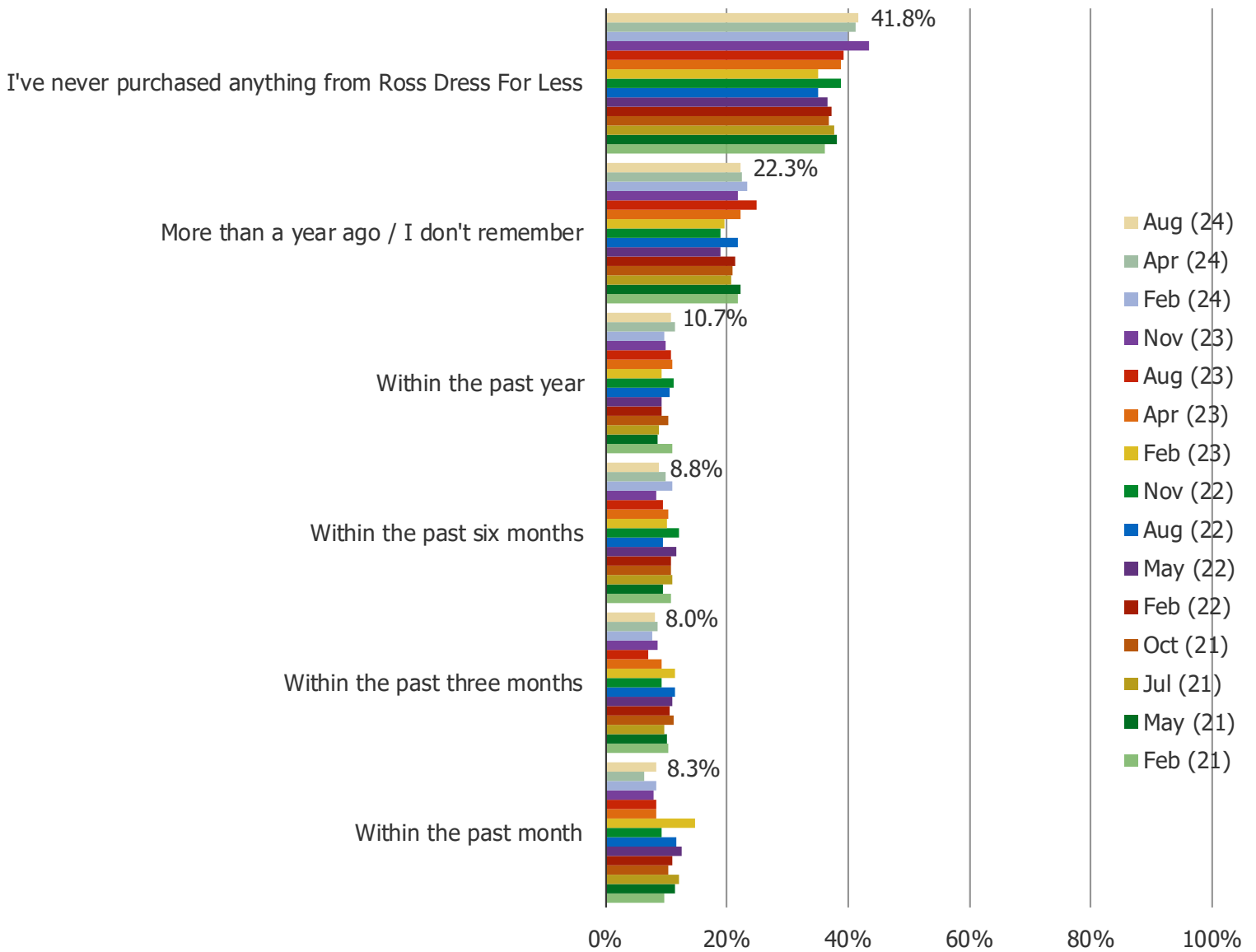
Posed to all consumers who purchased from Burlington in the past year, but said they are shopping it less compared to a year ago.



## DEPARTMENT STORES DEEP DIVES: ROSS

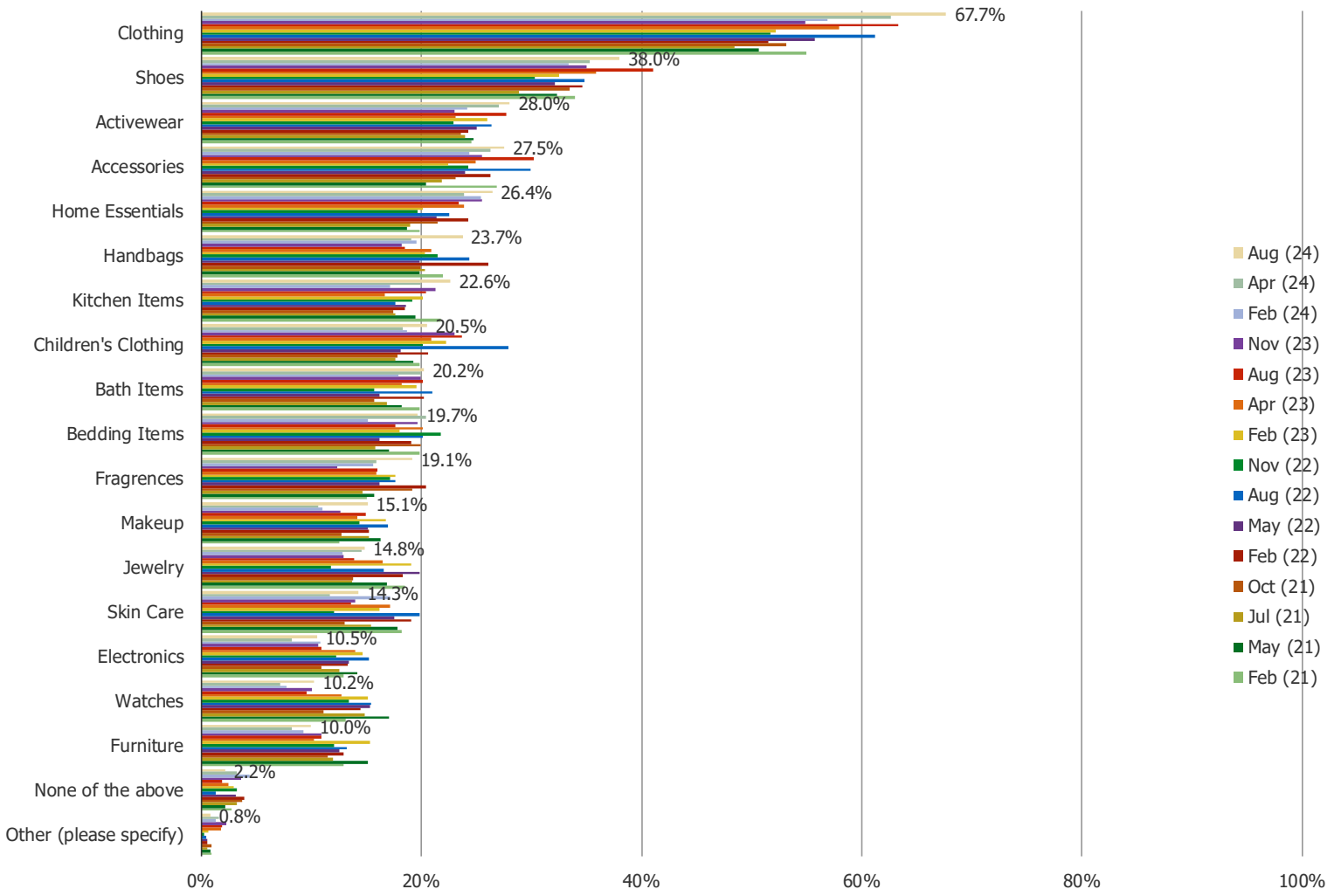
WHEN IS THE LAST TIME THAT YOU BOUGHT CLOTHING OR ACCESSORIES FOR YOURSELF FROM ROSS DRESS FOR LESS?

Posed to all consumers.



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

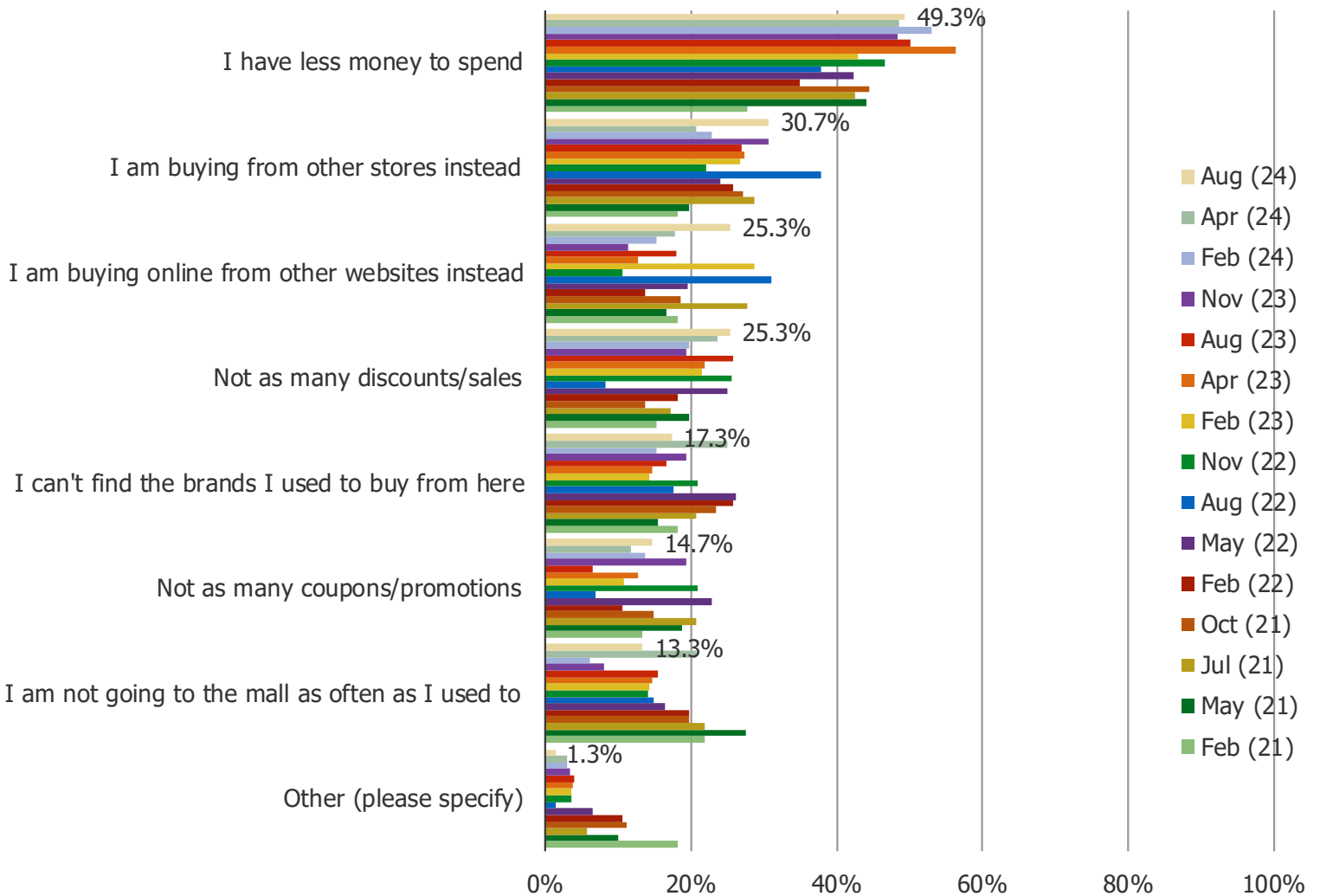
Posed to all consumers who purchased from Ross in the past year.





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

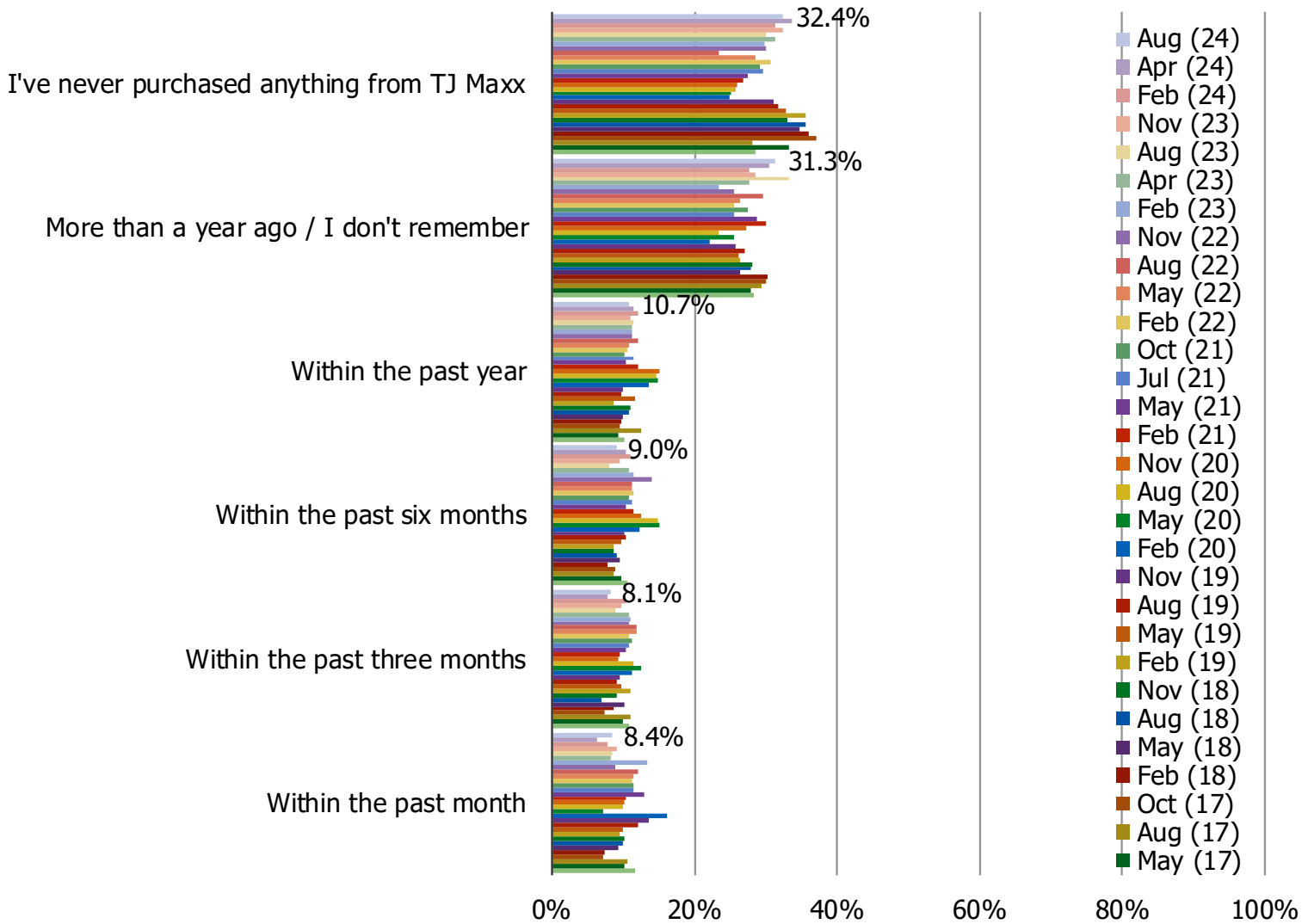
Posed to all consumers who purchased from Ross in the past year, but said they are shopping it less compared to a year ago.



## DEPARTMENT STORES DEEP DIVES: TJ MAXX

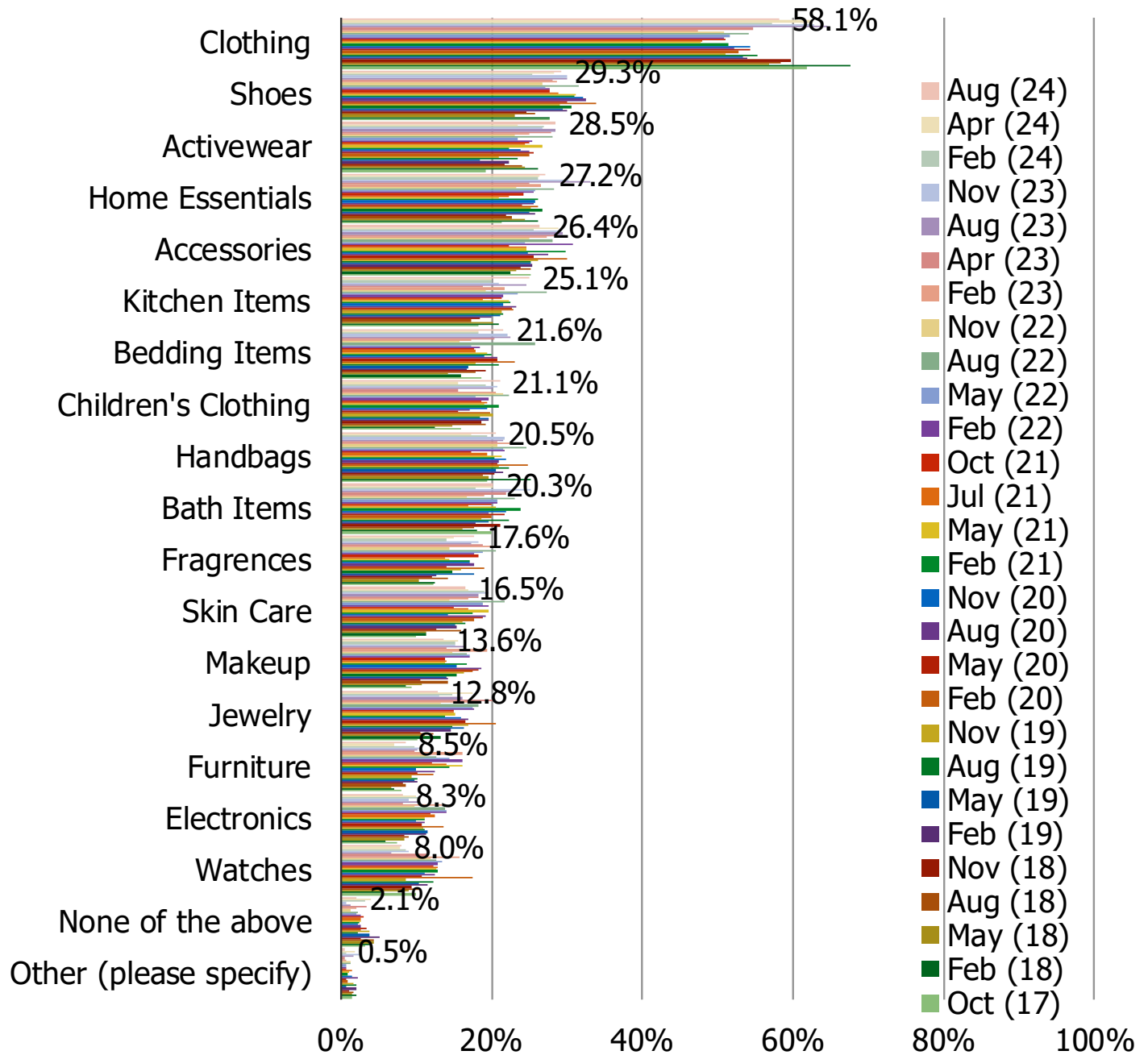
WHEN IS THE LAST TIME YOU PURCHASED SOMETHING FROM TJ MAXX?

Posed to all consumers.



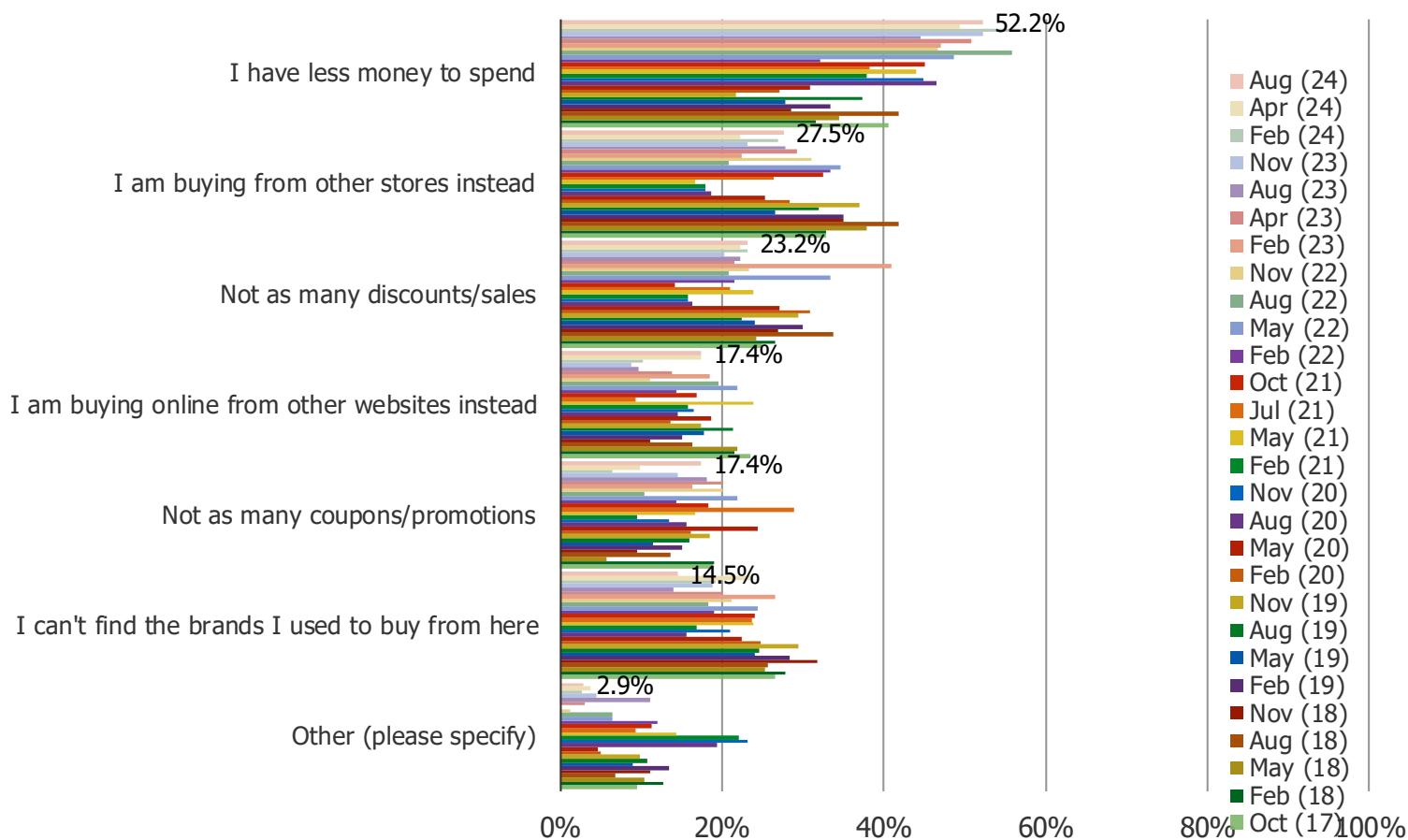
WHAT TYPE OF ITEMS DO YOU TYPICALLY BUY FROM TJ MAXX?

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.



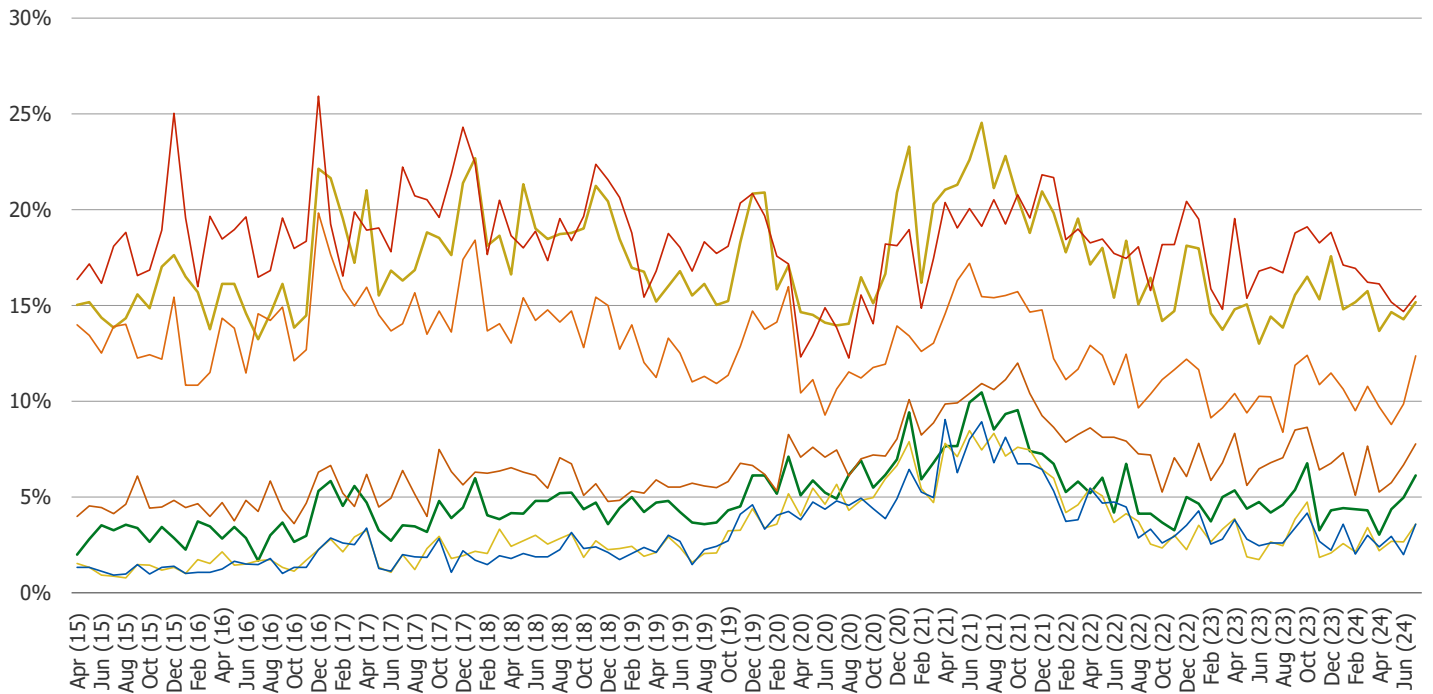
## MONTHLY TRAFFIC TRACKERS

AMONG ALL RESPONDENTS, BALANCED TO US 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).

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



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).

