



How Britain Shops 2008

Footwear

Reference Code: DMVT0446

Publication Date: 06/08

ABOUT VERDICT RESEARCH

Verdict Research is the UK's leading authority on retailing and publishes unrivalled independent analysis of the retail industry. With over 20 years experience, Verdict has close relationships with major UK retailers and access, at the highest level, to key executives working in the top 300 retailers to hear their views at first hand. Verdict reports provide clients with a complete picture of the retail sector and unique forecasts to help UK retailers, manufacturers, service suppliers, city analysts, consultants and the media with strategic planning.

Verdict Research Ltd is a wholly owned subsidiary of Datamonitor Plc. Datamonitor plc is a premium business information company specialising in industry analysis. It helps over 5,000 of the world's leading companies to address complex strategic issues. Through proprietary databases and wealth of expertise, it provides clients with unbiased expert analysis and in-depth forecasts for seven industry sectors: Automotive, Consumer Markets, Energy, Financial Services, Pharmaceuticals & Healthcare, Technology, and Transport & Logistics. Datamonitor maintains its headquarters in London and has regional offices in New York, San Francisco, Sydney and Frankfurt.

All Rights Reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior permission of the publisher, Verdict Research plc.

The facts of this report are believed to be correct at the time of publication but cannot be guaranteed. Please note that the findings, conclusions and recommendations that Verdict Research delivers will be based on information gathered in good faith from both primary and secondary sources, whose accuracy we are not always in a position to guarantee. As such Verdict Research can accept no liability whatever for actions taken based on any information that may subsequently prove to be incorrect.

TABLE OF CONTENTS

CHAPTER 1	INTRODUCTION	20
	What is cDNA?	20
	What's Available?	20
CHAPTER 2	EXECUTIVE SUMMARY	21
	Key Findings	21
	Retailer Highlights	23
	Profile of Footwear Shoppers	25
	Penetration of Footwear Shoppers	29
	Retailer Usage	31
	Main User Share by Region	35
	Conversion Rates	36
	Shopping Around	38
	Loyalty	40
	Drivers of Loyalty/Disloyalty	44
CHAPTER 3	ASDA (GEORGE)	49
	Key Findings	49
	Visitors	51
	Main Users	52
	Conversion Rates	54

Loyalty	55
Competitors	59
CHAPTER 4 BRANTANO	61
Key Findings	61
Visitors	63
Main Users	64
Conversion Rates	66
Loyalty	67
Competitors	71
CHAPTER 5 CLARKS	73
Key Findings	73
Visitors	75
Main Users	76
Conversion Rates	78
Loyalty	79
Competitors	83
CHAPTER 6 JD SPORTS	85
Key Findings	85
Visitors	87
Main Users	88
Conversion Rates	90

Loyalty	91	
Competitors	95	
CHAPTER 7	JJB SPORTS	97
Key Findings	97	
Visitors	99	
Main Users	100	
Conversion Rates	102	
Loyalty	103	
Competitors	107	
CHAPTER 8	MARKS & SPENCER	109
Key Findings	109	
Visitors	111	
Main Users	112	
Conversion Rates	114	
Loyalty	115	
Competitors	119	
CHAPTER 9	NEW LOOK	121
Key Findings	121	
Visitors	123	
Main Users	124	
Conversion Rates	126	

Loyalty	127
Competitors	131
CHAPTER 10 NEXT	133
Key Findings	133
Visitors	135
Main Users	136
Conversion Rates	138
Loyalty	139
Competitors	143
CHAPTER 11 SHOE ZONE	145
Key Findings	145
Visitors	147
Main Users	148
Conversion Rates	150
Loyalty	151
Competitors	155
CHAPTER 12 SPORTS WORLD	157
Key Findings	157
Visitors	159
Main Users	160
Conversion Rates	162

Loyalty	163
Competitors	167
CHAPTER 13 TK MAXX	169
Key Findings	169
Visitors	171
Main Users	172
Conversion Rates	174
Loyalty	175
Competitors	179
CHAPTER 14 APPENDIX	181
Basic Methodology	181
The selection of parliamentary constituencies	183
Metropolitan county	183
Other 100% urban	183
Mixed urban/rural	183
Rural	184
The selection of enumeration districts	184
The selection of respondents	185
Post survey weighting	185

LIST OF TABLES

Table 1:	Profile of footwear shoppers by region 2008	25
Table 2:	% of active footwear shoppers regularly using each retailer 2004-2008	31
Table 3:	Share of active footwear shoppers using a given retailer as their main store 2004-2008	32
Table 4:	Share of active footwear shoppers naming a retailer as their main store – by TV region 2008	35
Table 5:	Average rate of conversion from visitor to main user – by TV region 2008	36
Table 6:	Average number of other stores used by TV region 2008	38
Table 7:	% of footwear shoppers that are loyal to their main store – by TV region 2008	41
Table 8:	Detailed drivers of loyalty 2008	45
Table 9:	Footwear loyalty scores by retailer 2004-2008	46
Table 10:	Footwear disloyalty scores by retailer 2004-2008	47
Table 11:	What disloyal users preferred about other stores 2004-2008	48
Table 12:	Visitor share by region 2008	52
Table 13:	Main user share by region 2008	53
Table 14:	Conversion rates by region 2008	55
Table 15:	Loyalty by region 2008	56
Table 16:	Drivers of loyalty 2008	57
Table 17:	Drivers of disloyalty 2008	57
Table 18:	Potential change 2008	58

Table of Contents



Table 19:	Top retailers used in other sectors 2008	59
Table 20:	Other footwear stores used 2004-2008	60
Table 21:	Visitor share by region 2008	64
Table 22:	Main user share by region 2008	65
Table 23:	Conversion rates by region 2008	67
Table 24:	Loyalty by region 2008	68
Table 25:	Drivers of loyalty 2008	69
Table 26:	Drivers of disloyalty 2008	69
Table 27:	Potential change 2008	70
Table 28:	Top retailers used in other sectors 2008	71
Table 29:	Other footwear stores used 2004-2008	72
Table 30:	Visitor share by region 2008	76
Table 31:	Main user share by region 2008	77
Table 32:	Conversion rates by region 2008	79
Table 33:	Loyalty by region 2008	80
Table 34:	Drivers of loyalty 2008	81
Table 35:	Drivers of disloyalty 2008	81
Table 36:	Potential change 2008	82
Table 37:	Top retailers used in other sectors 2008	83
Table 38:	Other footwear stores used 2004-2008	84
Table 39:	Visitor share by region 2008	88
Table 40:	Main user share by region 2008	89

Table of Contents



Table 41:	Conversion rates by region 2008	91
Table 42:	Loyalty by region 2008	92
Table 43:	Drivers of loyalty 2008	93
Table 44:	Drivers of disloyalty 2008	93
Table 45:	Potential change 2008	94
Table 46:	Top retailers used in other sectors 2008	95
Table 47:	Other Footwear stores used 2004-2008	96
Table 48:	Visitor share by region 2008	100
Table 49:	Main user share by region 2008	101
Table 50:	Conversion rates by region 2008	103
Table 51:	Loyalty by region 2008	104
Table 52:	Drivers of loyalty 2008	105
Table 53:	Drivers of disloyalty 2008	105
Table 54:	Potential change 2008	106
Table 55:	Top retailers used in other sectors 2008	107
Table 56:	Other footwear stores used 2004-2008	108
Table 57:	Visitor share by region 2008	112
Table 58:	Main user share by region 2008	113
Table 59:	Conversion rates by region 2008	115
Table 60:	Loyalty by region 2008	116
Table 61:	Drivers of loyalty 2008	117
Table 62:	Drivers of disloyalty 2008	117

Table of Contents



Table 63:	Potential change 2008	118
Table 64:	Top retailers used in other sectors 2008	119
Table 65:	Other footwear stores used 2004-2008	120
Table 66:	Visitor share by region 2008	124
Table 67:	Main user share by region 2008	125
Table 68:	Conversion rates by region 2008	127
Table 69:	Loyalty by region 2008	128
Table 70:	Drivers of loyalty 2008 (%)	129
Table 71:	Drivers of disloyalty 2008	129
Table 72:	Potential change 2008	130
Table 73:	Top retailers used in other sectors 2008	131
Table 74:	Other footwear stores used 2004-2008 (%)	132
Table 75:	Visitor share by region 2008	136
Table 76:	Main user share by region 2008	137
Table 77:	Conversion rates by region 2008	139
Table 78:	Loyalty by region 2008	140
Table 79:	Drivers of loyalty 2008	141
Table 80:	Drivers of disloyalty 2008	141
Table 81:	Potential change 2008	142
Table 82:	Top retailers used in other sectors 2008	143
Table 83:	Other footwear stores used 2004-2008	144
Table 84:	Visitor share by region 2008	148

Table of Contents



Table 85:	Main user share by region 2008	149
Table 86:	Conversion rates by region 2008	151
Table 87:	Loyalty by region 2008	152
Table 88:	Drivers of loyalty 2008	153
Table 89:	Drivers of disloyalty 2008	153
Table 90:	Potential change 2008	154
Table 91:	Top retailers used in other sectors 2008	155
Table 92:	Other footwear stores used 2004-2008	156
Table 93:	Visitor share by region 2008	160
Table 94:	Main user share by region 2008	161
Table 95:	Conversion rates by region 2008	163
Table 96:	Loyalty by region 2008	164
Table 97:	Drivers of loyalty 2008	165
Table 98:	Drivers of disloyalty 2008	165
Table 99:	Potential change 2008	166
Table 100:	Top retailers used in other sectors 2008	167
Table 101:	Other footwear stores used 2006-2008	168
Table 102:	Visitor share by region 2008	172
Table 103:	Main user share by region 2008	173
Table 104:	Conversion rates by region 2008	175
Table 105:	Loyalty by region 2008	176
Table 106:	Drivers of loyalty 2008	177

Table of Contents



Table 107: Drivers of disloyalty 2008	177
Table 108: Potential change 2008	178
Table 109: Top retailers used in other sectors 2008	179
Table 110: Other footwear stores used 2004-2008	180
Table 111: Sample sizes by sector 2008	182

LIST OF FIGURES

Figure 1:	Footwear share of shopper 2004-2008 (%)	25
Figure 2:	Profile of footwear shoppers by gender 2004-2008 (%)	26
Figure 3:	Profile of footwear shoppers – by age bracket 2004-2008 (%)	27
Figure 4:	Profile of footwear shoppers – by socio-economic class 2004-2008 (%)	28
Figure 5:	% of consumers who shop for footwear – by demographics 2008	29
Figure 6:	% of consumers who shop for footwear – by TV region 2008	30
Figure 7:	Concentration of main user share of Top Five retailers 2006	33
Figure 8:	Concentration of main user share of Top Five retailers 2007	33
Figure 9:	Concentration of main user share of Top Five retailers 2008	34
Figure 10:	Average rate of conversion from visitor to main user 2004-2008 (%)	36
Figure 11:	Rate of conversion from visitors to main users by retailer 2008 (%)	37
Figure 12:	Average number of other stores used 2004-2008	38
Figure 13:	Average number of other stores used – by retailer 2008	39
Figure 14:	% of footwear shoppers that are loyal to their main store 2004-2008	40
Figure 15:	% of footwear shoppers that are loyal to their main store – by demographic group 2008	41
Figure 16:	% of footwear shoppers that are loyal to their main store – by retailer 2008	42
Figure 17:	Percentage point change in loyalty rates since last year – by retailer 2008	43
Figure 18:	% of loyal main users identifying drivers of loyalty 2004-2008	44
Figure 19:	Visitor share 2004-2008 (%)	51

Table of Contents



Figure 20: Visitor share by demographic group 2008 (%)	51
Figure 21: Main user share 2004-2008 (%)	52
Figure 22: Main user share by demographic group 2008 (%)	53
Figure 23: Conversion rates 2004-2008 (%)	54
Figure 24: Conversion rates by demographic group 2008 (%)	54
Figure 25: Loyalty 2004-2008 (%)	55
Figure 26: Loyalty by demographics 2008 (%)	56
Figure 27: Preference stores 2008 (%)	58
Figure 28: Shopping around 2004-2008	59
Figure 29: Visitor share 2004-2008 (%)	63
Figure 30: Visitor share by demographic group 2008 (%)	63
Figure 31: Main user share 2004-2008 (%)	64
Figure 32: Main user share by demographic group 2008 (%)	65
Figure 33: Conversion rates 2004-2008 (%)	66
Figure 34: Conversion rates by demographic group 2008 (%)	66
Figure 35: Loyalty 2004-2008 (%)	67
Figure 36: Loyalty by demographics 2008 (%)	68
Figure 37: Preference stores 2008 (%)	70
Figure 38: Shopping around 2004-2008	71
Figure 39: Visitor share 2004-2008 (%)	75
Figure 40: Visitor share by demographic group 2008 (%)	75
Figure 41: Main user share 2004-2008 (%)	76

Table of Contents



Figure 42: Main user share by demographic group 2008 (%)	77
Figure 43: Conversion rates 2004-2008 (%)	78
Figure 44: Conversion rates by demographic group 2008 (%)	78
Figure 45: Loyalty 2004-2008 (%)	79
Figure 46: Loyalty by demographics 2008 (%)	80
Figure 47: Preference stores 2008 (%)	82
Figure 48: Shopping around 2004-2008	83
Figure 49: Visitor share 2004-2008 (%)	87
Figure 50: Visitor share by demographic group 2008 (%)	87
Figure 51: Main user share 2004-2008 (%)	88
Figure 52: Main user share by demographic group 2008 (%)	89
Figure 53: Conversion rates 2004-2008 (%)	90
Figure 54: Conversion rates by demographic group 2008 (%)	90
Figure 55: Loyalty 2004-2008 (%)	91
Figure 56: Loyalty by demographics 2008 (%)	92
Figure 57: Preference stores 2008 (%)	94
Figure 58: Shopping around 2004-2008	95
Figure 59: Visitor share 2004-2008 (%)	99
Figure 60: Visitor share by demographic group 2008 (%)	99
Figure 61: Main user share 2004-2008 (%)	100
Figure 62: Main user share by demographic group 2008 (%)	101
Figure 63: Conversion rates 2004-2008 (%)	102

Table of Contents



Figure 64: Conversion rates by demographic group 2008 (%)	102
Figure 65: Loyalty 2004-2008 (%)	103
Figure 66: Loyalty by demographics 2008 (%)	104
Figure 67: Preference stores 2008 (%)	106
Figure 68: Shopping around 2004-2008	107
Figure 69: Visitor share 2004-2008 (%)	111
Figure 70: Visitor share by demographic group 2008 (%)	111
Figure 71: Main user share 2004-2008 (%)	112
Figure 72: Main user share by demographic group 2008 (%)	113
Figure 73: Conversion rates 2004-2008 (%)	114
Figure 74: Conversion rates by demographic group 2008 (%)	114
Figure 75: Loyalty 2004-2008 (%)	115
Figure 76: Loyalty by demographics 2008 (%)	116
Figure 77: Preference stores 2008 (%)	118
Figure 78: Shopping around 2004-2008	119
Figure 79: Visitor share 2004-2008 (%)	123
Figure 80: Visitor share by demographic group 2008 (%)	123
Figure 81: Main user share 2004-2008 (%)	124
Figure 82: Main user share by demographic group 2008 (%)	125
Figure 83: Conversion rates 2004-2008 (%)	126
Figure 84: Conversion rates by demographic group 2008 (%)	126
Figure 85: Loyalty 2004-2008 (%)	127

Table of Contents



Figure 86: Loyalty by demographics 2008 (%)	128
Figure 87: Preference stores 2008 (%)	130
Figure 88: Shopping around 2004-2008	131
Figure 89: Visitor share 2004-2008 (%)	135
Figure 90: Visitor share by demographic group 2008 (%)	135
Figure 91: Main user share 2004-2008 (%)	136
Figure 92: Main user share by demographic group 2008 (%)	137
Figure 93: Conversion rates 2004-2008 (%)	138
Figure 94: Conversion rates by demographic group 2008 (%)	138
Figure 95: Loyalty 2004-2008 (%)	139
Figure 96: Loyalty by demographics 2008 (%)	140
Figure 97: Preference stores 2008 (%)	142
Figure 98: Shopping around 2004-2008	143
Figure 99: Visitor share 2004-2008 (%)	147
Figure 100: Visitor share by demographic group 2008 (%)	147
Figure 101: Main user share 2004-2008 (%)	148
Figure 102: Main user share by demographic group 2008 (%)	149
Figure 103: Conversion rates 2004-2008 (%)	150
Figure 104: Conversion rates by demographic group 2008 (%)	150
Figure 105: Loyalty 2004-2008 (%)	151
Figure 106: Loyalty by demographics 2008 (%)	152
Figure 107: Preference stores 2008 (%)	154

Table of Contents



Figure 108: Shopping around 2004-2008	155
Figure 109: Visitor share 2006-2008 (%)	159
Figure 110: Visitor share by demographic group 2008 (%)	159
Figure 111: Main user share 2006-2008 (%)	160
Figure 112: Main user share by demographic group 2008 (%)	161
Figure 113: Conversion rates 2004-2008 (%)	162
Figure 114: Conversion rates by demographic group 2008 (%)	162
Figure 115: Loyalty 2004-2008 (%)	163
Figure 116: Loyalty by demographics 2008 (%)	164
Figure 117: Preference stores 2008 (%)	166
Figure 118: Shopping around 2006-2008	167
Figure 119: Visitor share 2004-2008 (%)	171
Figure 120: Visitor share by demographic group 2008 (%)	171
Figure 121: Main user share 2004-2008 (%)	172
Figure 122: Main user share by demographic group 2008 (%)	173
Figure 123: Conversion rates 2004-2008 (%)	174
Figure 124: Conversion rates by demographic group 2008 (%)	174
Figure 125: Loyalty 2004-2008 (%)	175
Figure 126: Loyalty by demographics 2008 (%)	176
Figure 127: Preference stores 2008 (%)	178
Figure 128: Shopping around 2004-2008	179