

Where Britain Shops 2008

Department Stores

Reference Code: DMVT0448

Publication Date: 07/08



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, investment 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.

CHAPTER 1 INTRODUCTION

What is cDNA?

Verdict's consumer dynamics programme – known as cDNA for short – provides a series of analytical products and services based around retail consumer research.

Over the past nine years we have interviewed more than 54,000 UK consumers about their shopping habits – among other things, asking them what they shop for, where they shop for it and what factors they look for when selecting a store.

The results of this intensive and ongoing study, which covers eight key retail sectors*, is a wealth of data that tracks market trends, company performance and consumer behaviour. This, together with Verdict's analytical insight, makes the cDNA programme one of the most pre-eminent consumer research tools for UK retailing.

* The main sectors covered are: clothing, DIY, electricals, food & grocery, footwear, homewares, music & video and personal care.

What's Available?

The findings from Verdict's cDNA research are available through:

Reports: Reports cover a variety of topics and areas, and combine well presented data and information with analytical opinions and expert insights that provide compelling messages to enhance your understanding of consumers.

Presentations: Presentations can cover any aspect of our cDNA research and can even combine findings with non-cDNA retail material. The amount and type of information included is entirely up to you, which means that a final presentation is tailored and responsive to the specific needs of your company.

Consulting: Designed to give you full control over your consumer research requirements, our cDNA consulting service provides bespoke solutions for a wide variety of business undertakings.

Database: The cDNA database is an interactive tool that allows raw data to be probed and investigated so you can undertake your own analysis and calculations. In providing this function the database gives you infinite research flexibility.

TABLE OF CONTENTS

CHAPTER 1	INTRODUCTION	3
	What is cDNA?	3
	What's Available?	3
CHAPTER 2	EXECUTIVE SUMMARY	20
	Key Findings	20
	Main Conclusions	21
CHAPTER 3	USE OF DEPARTMENT STORES	27
	Summary	27
	Department Store Share of Shoppers	30
	Profiles of Department Store Shoppers	32
	Profiles of Shoppers Who Do Not Use Department Stores	34
	Which Sectors Shoppers Use Department Stores For	36
	Share of Shoppers – by Department Store Retailer	38
	Department Store Cross-sector Shopping	39
CHAPTER 4	SECTOR ANALYSIS	40
	How Clothing Shoppers Use Department Stores	40
	How DIY Shoppers Use Department Stores	48
	How Electricals Shoppers Use Department Stores	55
	How Food & Grocery Shoppers Use Department Stores	61

How Footwear Shoppers Use Department Stores	67
How Homewares Shoppers Use Department Stores	74
How Music & Video Shoppers Use Department Stores	80
How Personal Care Shoppers Use Department Stores	87
CHAPTER 5 DEPARTMENT STORE RETAILER PROFILES	93
Debenhams	93
Overview	93
Debenhams Share of Shoppers	96
Debenhams Customer Profile	98
Debenhams Usage Profile	101
Debenhams Usage Profile	101
Debenhams Cross-sector Shopping	102
Fenwick	106
Overview	106
Fenwick Share of Shoppers	108
Fenwick Customer Profile	110
Fenwick Usage Profile	113
Fenwick Cross-sector Shopping	114
House of Fraser	118
Overview	118
House of Fraser Share of Shoppers	120
House of Fraser Customer Profile	122

Table of Contents



House of Fraser Usage Profile	125
House of Fraser Cross-sector Shopping	126
John Lewis	130
Overview	130
John Lewis Share of Shoppers	132
John Lewis Customer Profile	134
John Lewis Usage Profile	137
John Lewis Cross-sector Shopping	139
Marks & Spencer	143
Overview	143
Marks & Spencer Share of Shoppers	145
Marks & Spencer Customer Profile	147
Marks & Spencer Usage Profile	150
Marks & Spencer Cross-sector Shopping	152
Selfridges	156
Overview	156
Selfridges Share of Shoppers	158
Selfridges Customer Profile	160
Selfridges Usage Profile	163
Selfridges Cross-sector Shopping	165
TJ Hughes	169
Overview	169

Table of Contents



TJ Hughes Share of Shoppers	171
TJ Hughes Customer Profile	173
TJ Hughes Usage Profile	176
TJ Hughes Cross-sector Shopping	178
CHAPTER 6 APPENDIX	182
Basic Methodology	182
Selection of Parliamentary Constituencies	184
Metropolitan County	184
Other 100% Urban	184
Mixed Urban/Rural	184
Rural	184
Selection of Enumeration Districts	185
Selection of Respondents	186
Post Survey Weighting	186

LIST OF TABLES

Table 1:	Debenhams cross-department conversion matrix 2008	103
Table 2:	Where Debenhams shoppers also shop by sector 2008	104
Table 3:	Fenwick cross-department conversion matrix 2008	115
Table 4:	Where Fenwick shoppers also shop by sector 2008	116
Table 5:	House of Fraser cross-department conversion matrix 2008	127
Table 6:	Where House of Fraser shoppers also shop by sector 2008	128
Table 7:	John Lewis cross-department conversion matrix 2008	140
Table 8:	Where John Lewis shoppers also shop by sector 2008	141
Table 9:	Marks & Spencer cross-department conversion matrix 2008	153
Table 10:	Where Marks & Spencer shoppers also shop by sector 2008	154
Table 11:	Selfridges cross-department conversion matrix 2008	166
Table 12:	Where Selfridges shoppers also shop by sector 2008	167
Table 13:	TJ Hughes cross-department conversion matrix 2008	179
Table 14:	Where TJ Hughes shoppers also shop by sector 2008	180
Table 15:	Sample sizes by sector 2008	183

LIST OF FIGURES

Figure 1:	Share of all department store consumers (%) 2004-2008	30
Figure 2:	Share of consumers using department stores by region (%) 2008	31
Figure 3:	Share of consumers using department stores by demographics (%) 2008	31
Figure 4:	Profile of department store shoppers (%) 2008	32
Figure 5:	Profile of female department store shoppers (%) 2008	33
Figure 6:	Profile of male department store shoppers (%) 2008	33
Figure 7:	Profile of non-department store shoppers (%) 2008	34
Figure 8:	Profile of female non-department store shoppers (%) 2008	35
Figure 9:	Profile of male non-department store shoppers (%) 2008	35
Figure 10:	What department store shoppers use department stores for (%) 2008	36
Figure 11:	Department store shares of shoppers by sector (%) 2008	37
Figure 12:	Department store retailer share of all consumers (%) 2008	38
Figure 13:	Retailer share of all department store shoppers (%) 2008	38
Figure 14:	Cross-sector department store retailer scores 2008	39
Figure 15:	Percentage of all department store shoppers using the channel for clothing 2004-2008	42
Figure 16:	Percentage of all clothing shoppers using department stores for clothing 2004-2008	43
Figure 17:	Demographic profile of all shoppers who use department stores for clothing (%) 2008	43
Figure 18:	Demographic profile of all female shoppers who use department stores for clothing (%) 2008	44

Table of Contents



Figure 19: Demographic profile of all male shoppers who use department stores for clothing (%) 2008	44
Figure 20: Retailer share of all department store clothing shoppers (%) 2008	45
Figure 21: Retailer share of all clothing shoppers (%) 2008	45
Figure 22: Demographic index of department store shoppers compared with all clothing shoppers 2008	46
Figure 23: Demographic index of clothing shoppers compared with all department store shoppers 2008	47
Figure 24: Percentage of all department store shoppers using the channel for DIY 2004-2008	49
Figure 25: Percentage of all DIY shoppers using department stores for DIY 2004-2008	49
Figure 26: Demographic profile of all shoppers who use department stores for DIY (%) 2008	50
Figure 27: Demographic profile of all female shoppers who use department stores for DIY (%) 2008	51
Figure 28: Demographic profile of all male shoppers who use department stores for DIY (%) 2008	51
Figure 29: Retailer share of all department store DIY shoppers (%) 2008	52
Figure 30: Retailer share of all DIY shoppers (%) 2008	52
Figure 31: Demographic index of department store shoppers compared with all DIY shoppers 2008	53
Figure 32: Demographic index of DIY shoppers compared with all department store shoppers 2008	54
Figure 33: Percentage of all department store shoppers using the channel for electricals 2004-2008	56
Figure 34: Percentage of all electricals shoppers using department stores for electricals 2004-2008	57

Table of Contents



Figure 35: Demographic profile of all shoppers who use department stores for electricals (%) 2008	57
Figure 36: Demographic profile of all female shoppers who use department stores for electricals (%) 2008	58
Figure 37: Demographic profile of all male shoppers who use department stores for electricals (%) 2008	58
Figure 38: Retailer share of all department store electricals shoppers (%) 2008	59
Figure 39: Retailer share of all electricals shoppers (%) 2008	59
Figure 40: Demographic index of department store shoppers compared with all electricals shoppers 2008	60
Figure 41: Demographic index of electricals shoppers compared with all department store shoppers 2008	60
Figure 42: Percentage of all department store shoppers using the channel for food & grocery 2004-2008	62
Figure 43: Percentage of all food & groceries shoppers using department stores for food & grocery 2004-2008	63
Figure 44: Demographic profile of all shoppers who use department stores for food & grocery (%) 2008	63
Figure 45: Demographic profile of all female shoppers who use department stores for food & grocery (%) 2008	64
Figure 46: Demographic profile of all male shoppers who use department stores for food & grocery (%) 2008	64
Figure 47: Retailer share of all department store food & grocery shoppers (%) 2008	65
Figure 48: Retailer share of all food & grocery shoppers (%) 2008	65
Figure 49: Demographic index of department store shoppers compared with all food & grocery shoppers 2008	66

Figure 50: Demographic index of food & grocery shoppers compared with all department store shoppers 2008	66
Figure 51: Percentage of all department store shoppers using the channel for footwear 2004-2008	68
Figure 52: Percentage of all footwear shoppers using department stores for footwear 2004-2008	69
Figure 53: Demographic profile of all shoppers who use department stores for footwear (%) 2008	69
Figure 54: Demographic profile of all female shoppers who use department stores for footwear (%) 2008	70
Figure 55: Demographic profile of all male shoppers who use department stores for footwear (%) 2008	70
Figure 56: Retailer share of all department store footwear shoppers (%) 2008	71
Figure 57: Retailer share of all footwear shoppers (%) 2008	71
Figure 58: Demographic index of department store shoppers compared with all footwear shoppers 2008	72
Figure 59: Demographic index of footwear shoppers compared with all department store shoppers 2008	73
Figure 60: Percentage of all department store shoppers using the channel for homewares 2004-2008	75
Figure 61: Percentage of all homewares shoppers using department stores for homewares 2004-2008	76
Figure 62: Demographic profile of all shoppers who use department stores for homewares (%) 2008	76
Figure 63: Demographic profile of all female shoppers who use department stores for homewares (%) 2008	77
Figure 64: Demographic profile of all male shoppers who use department stores for homewares (%) 2008	77

Table of Contents



Figure 65:	Retailer share of all department store homewares shoppers (%) 2008	78
Figure 66:	Retailer share of all homewares shoppers (%) 2008	78
Figure 67:	Demographic index of department store shoppers compared with all homewares shoppers 2008	79
Figure 68:	Demographic index of homewares shoppers compared with all department store shoppers 2008	79
Figure 69:	Percentage of all department store shoppers using the channel for music & video 2004-2008	81
Figure 70:	Percentage of all music & video shoppers using department stores for music & video 2004-2008	82
Figure 71:	Demographic profile of all shoppers who use department stores for music & video (%) 2008	82
Figure 72:	Demographic profile of all female shoppers who use department stores for music & video (%) 2008	83
Figure 73:	Demographic profile of all male shoppers who use department stores for music & video (%) 2008	83
Figure 74:	Retailer share of all department store music & video shoppers (%) 2008	84
Figure 75:	Retailer share of all music & video shoppers (%) 2008	84
Figure 76:	Demographic index of department store shoppers compared with all music & video shoppers 2008	85
Figure 77:	Demographic index of music & video shoppers compared with all department store shoppers 2008	86
Figure 78:	Percentage of all department store shoppers using the channel for personal care 2004-2008	88
Figure 79:	Percentage of all personal care shoppers using department stores for personal care 2004-2008	89

Table of Contents



Figure 80: Demographic profile of all shoppers who use department stores for personal care (%) 2008	89
Figure 81: Demographic profile of all female shoppers who use department stores for personal care (%) 2008	90
Figure 82: Demographic profile of all male shoppers who use department stores for personal care (%) 2008	90
Figure 83: Retailer share of all department store personal care shoppers (%) 2008	91
Figure 84: Retailer share of all personal care shoppers (%) 2008	91
Figure 85: Demographic index of department store shoppers compared with all personal care shoppers 2008	92
Figure 86: Demographic index of personal care shoppers compared with all department store shoppers 2008	92
Figure 87: Percentage of all consumers who use Debenhams 2004-2008	96
Figure 88: Percentage of all department store shoppers who use Debenhams 2004-2008	96
Figure 89: Debenhams sector shares (%) 2008	97
Figure 90: Consumers using Debenhams: penetration of demographic segments (%) 2008	98
Figure 91: Demographic index of all Debenhams shoppers compared with all department store shoppers 2008	99
Figure 92: Demographic profile of all Debenhams shoppers (%) 2008	99
Figure 93: Demographic profile of all female Debenhams shoppers (%) 2008	100
Figure 94: Demographic profile of all male Debenhams shoppers (%) 2008	100
Figure 95: What Debenhams shoppers use it for (%) 2008	101
Figure 96: Debenhams sectors shopped (%) 2008	101

Table of Contents



Figure 97: Debenhams cross-sector participation 2004-2008	102
Figure 98: Demographic profile of Debenhams cross-sector participation 2008	102
Figure 99: Percentage of Debenhams shoppers using other department stores 2008	105
Figure 100: Percentage of all consumers who use Fenwick 2004-2008	108
Figure 101: Percentage of all department store shoppers who use Fenwick 2004-2008	108
Figure 102: Fenwick sector shares (%) 2008	109
Figure 103: Consumers using Fenwick: penetration of demographic segments (%) 2008	110
Figure 104: Demographic index of all Fenwick shoppers compared with all department store shoppers 2008	111
Figure 105: Demographic profile of all Fenwick shoppers (%) 2008	111
Figure 106: Demographic profile of all female Fenwick shoppers (%) 2008	112
Figure 107: Demographic profile of all male Fenwick shoppers (%) 2008	112
Figure 108: What Fenwick shoppers use it for (%) 2008	113
Figure 109: Fenwick sectors shopped (%) 2008	113
Figure 110: Fenwick cross-sector participation 2004-2008	114
Figure 111: Demographic profile of Fenwick cross-sector participation 2008	114
Figure 112: Percentage of Fenwick shoppers using other department stores 2008	117
Figure 113: Percentage of all consumers who use House of Fraser 2004-2008	120
Figure 114: Percentage of all department store shoppers who use House of Fraser 2004-2008	120
Figure 115: House of Fraser sector shares (%) 2008	121

Figure 116: Consumers using House of Fraser: penetration of demographic segments (%) 2008	122
Figure 117: Demographic index of all House of Fraser shoppers compared with all department store shoppers 2008	123
Figure 118: Demographic profile of all House of Fraser shoppers (%) 2008	123
Figure 119: Demographic profile of all female House of Fraser shoppers (%) 2008	124
Figure 120: Demographic profile of all male House of Fraser shoppers (%) 2008	124
Figure 121: What House of Fraser shoppers use it for (%) 2008	125
Figure 122: House of Fraser sectors shopped (%) 2008	125
Figure 123: House of Fraser cross-sector participation 2004-2008	126
Figure 124: Demographic profile of House of Fraser cross-sector participation 2008	126
Figure 125: Percentage of House of Fraser shoppers using other department stores 2008	129
Figure 126: Percentage of all consumers who use John Lewis 2004-2008	132
Figure 127: Percentage of all department store shoppers who use John Lewis 2004-2008	132
Figure 128: John Lewis sector shares (%) 2008	133
Figure 129: Consumers using John Lewis: penetration of demographic segments (%) 2008	134
Figure 130: Demographic index of all John Lewis shoppers compared with all department store shoppers 2008	135
Figure 131: Demographic profile of all John Lewis shoppers (%) 2008	135
Figure 132: Demographic profile of all female John Lewis shoppers (%) 2008	136
Figure 133: Demographic profile of all male John Lewis shoppers (%) 2008	136

Table of Contents



Figure 134: What John Lewis shoppers use it for (%) 2008	137
Figure 135: John Lewis sectors shopped (%) 2008	138
Figure 136: John Lewis cross-sector participation 2004-2008	139
Figure 137: Demographic profile of John Lewis cross-sector participation 2008	139
Figure 138: Percentage of John Lewis shoppers using other department stores 2008	142
Figure 139: Percentage of all consumers who use Marks & Spencer 2004-2008	145
Figure 140: Percentage of all department store shoppers who use Marks & Spencer 2004-2008	145
Figure 141: Marks & Spencer sector shares (%) 2008	146
Figure 142: Consumers using Marks & Spencer: penetration of demographic segments (%) 2008	147
Figure 143: Demographic index of all Marks & Spencer shoppers compared with all department store shoppers 2008	148
Figure 144: Demographic profile of all Marks & Spencer shoppers (%) 2008	148
Figure 145: Demographic profile of all female Marks & Spencer shoppers (%) 2008	149
Figure 146: Demographic profile of all male Marks & Spencer shoppers (%) 2008	149
Figure 147: What Marks & Spencer shoppers use it for (%) 2008	150
Figure 148: Marks & Spencer sectors shopped (%) 2008	151
Figure 149: Marks & Spencer cross-sector participation 2004-2008	152
Figure 150: Demographic profile of Marks & Spencer cross-sector participation 2008	152
Figure 151: Percentage of Marks & Spencer shoppers using other department stores 2008	155

Table of Contents



Figure 152: Percentage of all consumers who use Selfridges 2004-2008	158
Figure 153: Percentage of all department store shoppers who use Selfridges 2004-2008	158
Figure 154: Selfridges sector shares (%) 2008	159
Figure 155: Consumers using Selfridges: penetration of demographic segments (%) 2008	160
Figure 156: Demographic index of all Selfridges shoppers compared with all department store shoppers 2008	161
Figure 157: Demographic profile of all Selfridges shoppers (%) 2008	161
Figure 158: Demographic profile of all female Selfridges shoppers (%) 2008	162
Figure 159: Demographic profile of all male Selfridges shoppers (%) 2008	162
Figure 160: What Selfridges shoppers use it for (%) 2008	163
Figure 161: Selfridges sectors shopped (%) 2008	164
Figure 162: Selfridges cross-sector participation 2004-2008	165
Figure 163: Demographic profile of Selfridges cross-sector participation 2008	165
Figure 164: Percentage of Selfridges shoppers using other department stores 2008	168
Figure 165: Percentage of all consumers who use TJ Hughes 2004-2008	171
Figure 166: Percentage of all department store shoppers who use TJ Hughes 2004-2008	171
Figure 167: TJ Hughes sector shares (%) 2008	172
Figure 168: Consumers using TJ Hughes: penetration of demographic segments (%) 2008	173
Figure 169: Demographic index of all TJ Hughes shoppers compared with all department store shoppers 2008	174

Table of Contents



Figure 170: Demographic profile of all TJ Hughes shoppers (%) 2008	174
Figure 171: Demographic profile of all female TJ Hughes shoppers (%) 2008	175
Figure 172: Demographic profile of all male TJ Hughes shoppers (%) 2008	175
Figure 173: What TJ Hughes shoppers use it for (%) 2008	176
Figure 174: TJ Hughes sectors shopped (%) 2008	177
Figure 175: TJ Hughes cross-sector participation 2004-2008	178
Figure 176: Demographic profile of TJ Hughes cross-sector participation 2008	178
Figure 177: Percentage of TJ Hughes shoppers using other department stores 2008	181