

THINK RETAIL THINK VERDICT



UK Consumer Satisfaction Index 2009

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About Verdict Research

Authorative analysis...

Verdict's analysts and consultants work closely with retailers, suppliers, consultancies, investment banks and property companies to identify the key issues, sector and company data and strategies driving the changing retail market.

Our research identifies how retailers can enhance product, store and brand performance as well as the factors that determine future retail success. Our specialist in-store auditing team continuously collects price and product data across locations, brands, fascias, ranges and retail sectors.

Rigorous research methodology...

Our in-house retail expertise and rigorous research methodology ensure our reports provide complete and accurate analysis of the major players, issues and trends together with a detailed examination of the strategic implications for the retail market.

For key players in the retail industry, our reports are the first source of information on sector forecasts, retailer performance, store and product portfolio developments and trading strategy.

Global, European and UK analysis across nine core sectors...

Verdict Research reports covers nine core sectors, five year forecasts, strategic issues, key locations, How Britain Shops consumer surveys and the main European retail markets. Also available are a daily news service, weekly newsletter and tailored consultancy portfolios to suit individual business information needs.

Over 20 years of experience...

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 first hand views. 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.

A key source for independent analysis and comment...

Verdict Research is regarded as a key source by the BBC, ITV, Sky News and the UK's leading broadsheets including the FT, Times, The Independent and Daily Telegraph. Leading trade publications often refer to Verdict's opinion and research including Retail Week, Drapers, DIY Week, Cabinet Maker and The Grocer.

In addition Verdict regularly appears in the international media. News sources quoting Verdict analysts and data include CNN, the International Herald Tribune, The Australian, Los Angeles Times, and New York Times.



"Verdict are the company of choice for any research analysis and insight into retailing"

Sir Stuart Rose
Executive Chairman
Marks & Spencer

UK Consumer Satisfaction Index 2009

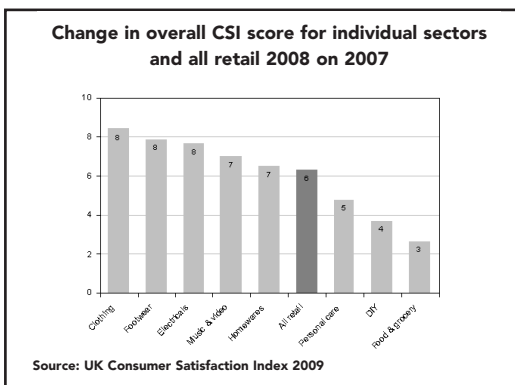
Over the past 11 years Verdict has conducted over 66,000 interviews of UK consumers about their shopping habits, asking them what they shop for, where they shop for it and what factors they look for when selecting a store. The result of this intensive and ongoing study is a wealth of data that tracks market trends, company performance and consumer behaviour.

Customer opinion is the principal driver behind retailer performance but is often the most difficult factor to measure. Verdict's UK Consumer Satisfaction Index 2009 (CSI) series of reports is the ONLY reliable and accurate benchmark of retailer satisfaction performance that is defined by the customer. The CSI 2009 report will enable retailers to ensure high levels of customer satisfaction through correct allocation of resources, identifying and implementing best practice strategies and predicting future trends in consumer behaviour and preferences.

Now in its 11th year, this series analyses the results of a survey of 6,000 UK consumers to identify their satisfaction levels with 67 key UK retailers across eight different retail sectors including **food & grocery, clothing, footwear, DIY, electricals, homewares, personal care and music & video**. This allows retailers to better understand and serve the needs of their customers, enhancing the offer, identifying how to consistently achieve high levels of customer satisfaction, and predicting changes in consumer preferences.

Use the UK CSI 2009 satisfaction scores to understand which factors drive UK consumer satisfaction and how to ensure you attract and retain customers...

The UK Consumer Satisfaction series of reports details the results of our proprietary survey...



"...a survey of 6000 consumers to enable you to benchmark 67 UK retailers across eight key retail sectors in terms of keeping their customers satisfied..."

- **Allocate your resources more effectively** by understanding the relative importance of each of the key retail satisfaction factors to UK consumers including range, convenience, price, service, quality, ambience, facilities and layout.
- **Benchmark your performance against the leading UK retailers** in clothing, DIY, electricals, food and grocery, footwear, homewares, music and video and personal care in terms of the key retail satisfaction factors.
- **Identify best practice strategies for customer satisfaction across UK retailing** using the insightful analysis in this series of reports that interprets how events and shifts in strategy have driven the changes in consumer satisfaction scores.
- **Predict future changes in consumer preferences** and tailor your strategies to retain existing shoppers, attract new shoppers and convert occasional users into main shoppers.

UK Consumer Satisfaction Index 2009

Key UK retailers examined by UK CSI 2009...

- Aldi
- Amazon
- Argos
- Asda
- Avon
- B&Q
- Barratts
- BHS
- Body Care
- Body Shop
- Bonmarche
- Boots
- Brantano
- Burton
- Clarks
- Comet
- Co-op
- Currys
- Debenhams
- Dixons.com
- Dorothy Perkins
- Dunelm
- eBay
- Evans
- Faith
- Focus
- Footlocker
- Gap
- H&M
- HMV
- Homebase
- House of Fraser
- Iceland
- IKEA
- iTunes
- JD Sports
- JJB Sports
- John Lewis
- Lidl
- Marks & Spencer
- Matalan
- Morrison
- Netto
- New Look
- Next
- Office
- Peacocks
- Primark
- River Island
- Sainsbury
- Savers
- Schuh
- Shoe Zone
- Somerfield
- Sports World
- Stead & Simpson
- Superdrug
- Tesco
- TK Maxx
- TopMan
- TopShop
- Waitrose
- WH Smith
- Wickes
- Wilkinson
- Woolworths
- Zavvi

This report answers key questions including...

Retailers ranked by overall CSI score 2009 (Extract)

Retailers ranked by overall CSI score 2009							
Rank 2009	Retailer	CSI Score	2008 rank	2007 rank	2006 rank	2005 rank	2004 rank
40	TopMan	114	36	25	66	54	60
41	Body Care	114	52	52	48	47	10
42	Stead & Simpson	112	47	46	55	9	49
43	Woolworths	112	63	51	43	49	33
44	Morrison	111	46	45	32	38	16
45	Office	111	-	-	-	-	-
46	Faith	111	28	-	-	-	-
47	H&M	110	6	6	-	-	-
48	Schuh	110	41	16	8	31	3
49	Footlocker	106	56	47	57	45	52
50	Tesco	105	55	54	33	36	47

Source: Verdict Research

Source: UK Consumer Satisfaction Index 2009

"This table shows retailers from all sectors ranked according to their overall CSI score. Historical ranks for 2004 to 2009 are also shown..."

- Who are the top 10 retailers in consumer satisfaction for 2009 in each product category?
- Across the 67 retailers examined, which have the best and worst overall CSI ranking in each product category?
- Which retailers have the highest scores across the eight factors making up the retail proposition?
- What do customers like about your stores and/or website?
- Why do potential customers shop with rival retailers?
- As a retailer, why do your customers shop in your stores?
- How could you satisfy your customers more?
- In what areas do your competitors excel and fail in?

UK Consumer Satisfaction Index 2009

Methodology

Step 1. Groups of customers who shop at certain stores across each of the retail sectors are identified. These people have to be regular users of the store and classify it as their main destination for a particular product; we don't look at people who might just visit the store very occasionally.

Step 2. Customers are split into those who are loyal to the retailer and those who are not. Loyal customers are those who, given a free choice, would not shop anywhere else; disloyal customers would prefer to shop somewhere else. Loyal customers are, overall, generally satisfied with the store; disloyal customers are, overall, dissatisfied.

Step 3. Loyal customers are asked what they like about the store; they are able to pick from a range of factors that fall into eight categories. Disloyal customers are asked what they dislike about the store; again they can pick from a range of factors which fall into the eight categories.

Step 4. For each of the eight categories, the number of negative mentions (i.e. disloyal customers saying they are dissatisfied with the corresponding factor) are deducted from the number of positive mentions (i.e. loyal customers saying they are satisfied with the factor). This figure is then divided by the total number of people in the survey who shop at the retailer under examination.

Result. From this calculation we get individual CSI scores for each of the factors of satisfaction. In their totality these range from -100 to +100. The overall CSI score is simply the sum of the eight factors.

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