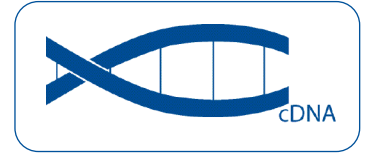


THINK RETAIL THINK VERDICT

---



# How Britain Shops 2009: Personal Care

---

Published: July 2009

Reference Code: DMVT0524

Report Price: £2,495/€3,610/\$4,795

# 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 instore 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

# How Britain Shops 2009



## What is Verdict's Consumer Dynamics Programme?

Verdict's consumer dynamics programme (cDNA) provides a series of analytical products and services based around retail consumer research including How Britain Shops, Where Britain Shops and the Consumer Satisfaction Index.

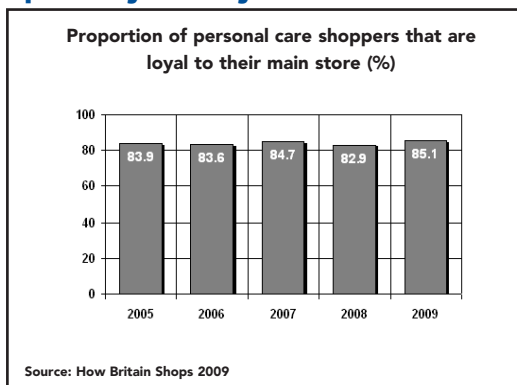
Over the past nine years Verdict has conducted over 54,000 interviews with UK consumers about their shopping habits amongst other things asking them what they shop for, where they shop for it and what factors they look for when selecting a store. The result of this intensive and ongoing study is a wealth of data that tracks market trends, company performance and consumer behaviour. This, together with Verdict's analytical insight, makes the cDNA programme one of the most pre-eminent consumer research tools available for UK retailing.

## Research Methodology

Verdict conducted a representative survey of over 6,000 adults across the UK during November of 2008. Interviews were face-to-face and quotas were set in terms of age, sex and working status and were conducted by GfK NOP Consumer. The sample was then weighted to bring it into line with national population profiles, and throughout the reports weighted samples data are used. Individuals were asked in which sectors they personally shop and then answer a series of questions about their shopping habits in that particular sector.

**How Britain Shops 2009 reports contain easily navigated data and insightful analysis enabling you to understand what drives customers to use each of the leading UK retailers. In addition our proprietary survey results will help you to identify the effects of initiatives taken by retailers and key marketplace events on consumer behaviour...**

### The How Britain Shops series of reports details the results of our proprietary survey...



"...a survey of 6000 consumers to enable you to benchmark 69 UK retailers across eight key retail sectors in terms of keeping their customers satisfied..."

**How Britain Shops 2009** is a series of 9 new reports published by Verdict Research providing a detailed examination of the shopping habits of UK Shoppers. At sector level each report analyses customer loyalty, conversion rates, shopping around, loyalty drivers, customer profiles, demographics and socio-economic trends.

The series includes individual reports detailing:

- Clothing
- DIY
- Electricals
- Food & grocery
- Footwear
- Homewares
- Music & video
- Personal care

In addition our summary report details the key data and findings across all 8 sectors.

# How Britain Shops 2009 - Personal Care

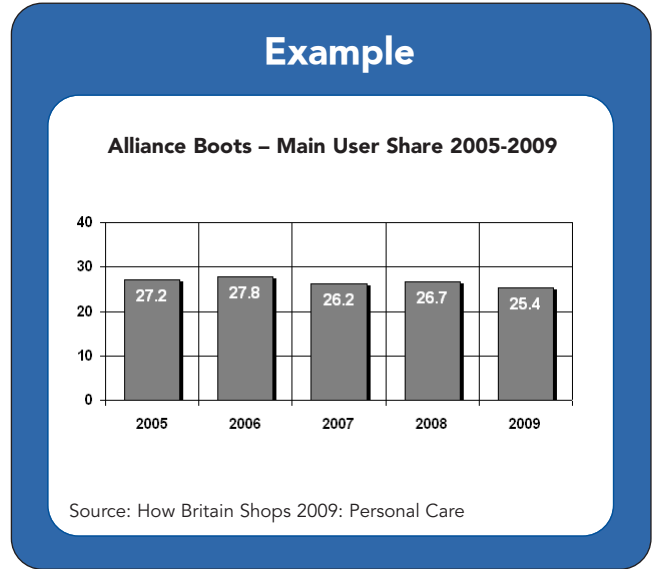
More consumers are shopping for personal care than ever before, with the share of consumers shopping regularly for personal care up 5.6 percentage points on 2008. This has been driven by three main factors. Firstly a rise in men buying personal care, with men now making up 39.5% of shoppers, an increase of 2.8 percentage points. Secondly, the rapid expansion of the supermarkets and enhancements to their personal care offers - which has seen their visitor share numbers increase by 14.3 percentage points, continues to encourage impulse spend and more regular personal care purchases. Finally, the sector is not impacted by recession due to the essential nature of the purchase and women not willing to cut out this element of their spend.

## Some key questions answered by this report:

- Why is the largest specialist Boots losing market share?
- What are the drivers of customer loyalty?
- How have the drivers of spend, such as price, range and service changed?

## Companies profiled in this report:

- Asda • Avon • Boots • Morrison • Sainsbury • Savers • Superdrug • Tesco • Wilkinson



## Table of Contents (Slides 93

## Tables 84

## Figures 109)

### EXECUTIVE SUMMARY

- Key Findings
- Profile of shoppers by sector
- Penetration of shoppers by sector
- Retailer usage
- Main user share by region
- Conversion rates
- Shopping around
- Loyalty
- Drivers of loyalty/disloyalty

### COMPANY PROFILES

- Key findings
- Visitors
- Main users
- Conversion rates
- Loyalty
- Competitors

### FIGURES

- Share of shoppers (%) 2005-09
- Shopping around 2009
- Preference stores (%) 2009
- Profile of shoppers by gender, age bracket & socio-economic class (%) 2005-09
- Proportion of consumers who shop within sector by demographics & TV region (%) 2009
- Concentration of main user share of Top Five retailers 2005-09
- Average rate of conversion from visitor to main user (%) 2009
- Rate of conversion from visitors to main users by retailer (%) 2009
- Average number of other stores used
  - All 2005-09
  - By retailer 2009

- % change in loyalty rates since last year by retailer 2009
- Proportion of loyal main users identifying drivers of loyalty (%) 2005-09
- Visitor share, main user share, conversion rates & loyalty (%) 2005-09
- Visitor share, main user share, conversion rates & loyalty by demographic group (%) 2009

### TABLES

- Profile of shoppers by region 2009
- Share of active shoppers
  - Regularly using each retailer, 2005-09
  - Using a given retailer as their main store, 2005-09
  - Naming a retailer as their main store by TV region 2009

- Average rate of conversion from visitor to main user by TV region 2009
- Average number of other stores used by TV region 2009
- Proportion of shoppers that are loyal to their main store by TV region 2009
- Detailed drivers of loyalty (%) 2009
- Loyalty/disloyalty scores by retailer (%) 2005-09
- What disloyal users preferred about other stores (%) 2005-09
- Visitor share, main user share, conversion rates & loyalty by region 2009
- Drivers of loyalty/disloyalty 2009
- Potential change 2009
- Other retailers & stores used 2009

