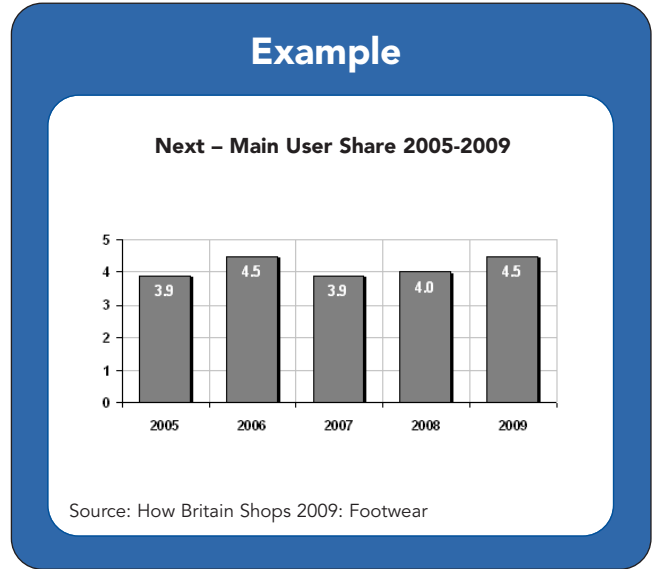


How Britain Shops 2009 - Footwear

There has been a big rise in footwear shoppers despite sector casualties. The footwear sector recorded its second highest share of shoppers in the 10 years of this research. 73.1% of the adult population is shopping for footwear this year – only 1.6 points below its peak share in 2002. This trend is despite the sector suffering some of the most high profile casualties over the year, including Dolcis, Stead & Simpson and Stylo.

Some key questions answered by this report:

- What impact has the onset of recession had on price as a driver of loyalty?
- How have footwear, clothing and sportswear specialists performed this year?
- Is range still as important a driver of loyalty?



Companies profiled in this report:

- Asda (George)
- Barratts
- Brantano
- Clarks
- JJB
- JD Sport
- Marks & Spencer
- New Look
- Next
- Sports Direct
- Shoe Zone
- TK Maxx

Table of Contents (Slides 118

Tables 107

Figures 148)

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 2008