

Department Store Retailing - UK - April 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

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“In order to stand out in a competitive market, it is essential for department stores to ensure that they improve their stores, with a quarter of consumers saying a modern looking store would encourage them to shop there more.”

– Tamara Sender, Senior Clothing Analyst

This report looks at the following areas:

- How have department stores performed over the last year and what is the outlook?
- What are department stores doing to stand out in fashion and to compete with clothing retailers?
- To what extent have the main players been investing in their beauty offering?
- How are department stores competing in a multichannel world?
- What are the main growth opportunities for department stores?

The department store sector has maintained steady growth and Mintel estimates a rise in sales in 2013, although the market has been impacted by M&S' continued poor performance and weaker sales by Debenhams. We forecast that the sector will see sales reach £16.6 billion by 2018 helped by players such as John Lewis and the premium department stores such as Selfridges and Harrods.

While consumers rate department stores overall highly for product quality, store standards and customer service, the consumer research highlights that there is room for improvement in areas such as in-store services for example cafés and restaurants.

Better loyalty schemes stand out as the main factor that would encourage people to shop more at a department store. Young people aged under 35, who are the most frequent in-store and online department store shoppers, are interested in personalised services such as a personal shopper, fitting services and clothes adjustment.

There are no hard and fast rules. But, we would expect stores to typically trade from a minimum of 1,000 sq m and stock at least half a dozen different broad product categories, with one category unlikely to account for more than two thirds of turnover, and usually significantly less than this.

As a minimum, all department stores covered in this report sell adult and children's apparel, lingerie, fashion accessories, footwear, beauty products and some homewares. Larger full-line stores have a much wider product assortment.

Some department stores retained their food halls through the 1990s and others have been re-introducing them. The food offer is typically upscale and geared towards fine foods and delicatessen, and therefore differentiated from the everyday supermarket.

The offer usually covers a mix of concessions and own-bought ranges, increasingly with a private label element within the own-bought assortment. M&S differs in that virtually its entire range is own brand/private label.

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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