

**THE JOHN
LEWIS
RETAIL
REPORT**

2015

**HOW WE
SHOP,
LIVE
& LOOK**

John Lewis

THE JOHN LEWIS RETAIL REPORT 2015

HOW WE SHOP, LIVE & LOOK

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Welcome to the third John Lewis Retail Report, our annual look at how customers' shopping habits and product preferences have changed over the last twelve months.

This year we saw a more confident consumer emerge; one who expects to research products, compare prices, order, and collect their goods when it suits them. The consumer of 2015 uses channels interchangeably depending on what they want to buy and when they want it. We've coined the phrase the "Master Shopper" to describe the multi-faceted shopping habits of today's modern consumers, and taken a look at some of their most typical journeys (see *How we shop*).

For the "Master Shopper", shops are as much a social destination as a place to shop on the go. Shops are more inspirational and multi-purpose, with customers as likely to use our new &Beauty spa, buy a holiday from Kuoni, or grab a pizza, as they are to browse for the latest season's fashion, home or tech products.

Looking ahead to 2016 we expect shopping to become even more omnichannel, with "Master Shoppers" becoming increasingly

mobile-savvy, and apps and websites becoming faster, slicker and more intuitive.

The backdrop to these changing shopping habits was notable peaks and troughs in our sales figures, partly thanks to the General Election and as a result of unseasonable weather (see *What shaped the way we shopped*), as well as landmark shopping events. Chief among these was Black Friday, which in 2014 saw our biggest ever week of sales in our 150 years of trading.

This year's report also reflects the nation's growing self-assurance in its style choices. With the rise of social media as a source of inspiration and self-expression, customers are now confident in making a statement with what they buy.

2015 was the year of prints and patterns in the home inspired by the 1970s. It also saw Outdoor Living increase a huge 25%, as Britain capitalised on its outdoor space (see page 22). In fashion, it was all about attitude not age, as customers opted for contemporary, confident looks, with fashion sales 7% higher than last year.

But looking one's best was not just about a wardrobe overhaul. This year, more than ever, customers understood that confidence comes from feeling good within. Over the past twelve months we saw a huge boost in sales of everything related to well-being, from Fitbits to NutriBullets, anti-ageing creams to running machines.

So all in all, it has been a year of stylish, confident shopping. The "Master Shopper" is keeping us on our toes as they opt for ever-more personalised ways to buy, and in the retail industry our challenge is to keep pace as omnichannel evolves. I hope you'll enjoy finding out more about how the nation shopped, lived and looked within these pages.

Chapter One: What Shaped The Way We Shopped?

The backdrop to our sales this year included the General Election, a national craze for spiralized courgettes, a growing fondness for gin and the arrival of a new princess.

Whether it was David Beckham's 40th in Marrakech, a young Prince George photographed in his red cords or the lavish Italian wedding of George and Amal Clooney that inspired our customers this year, we curated our product range to meet all tastes. However, there were some serious events that had a more macro effect on the nation's shopping habits, the main one being the General Election. As the nation awaited the outcome of the tightly-run contest, our customer numbers dipped slightly and sales of big ticket purchases such as furniture slowed. Post-election, sales recovered quickly, as a sense of a stable economic landscape returned. And when people were holding off on significant investments, little indulgences saw them through. (It was a good year for scented candles, Champagne, chocolates and gin.)

Consumer confidence was on the up this year, reflected in Britain's increased spend on foreign holidays. 25% of John Lewis customers stated they were spending more on holidays abroad this year¹. Sales of travel essentials such as plug adaptors (increasing by 20% on last year), wallets (37%) and suitcase padlocks (26%) all went to show that Britain was packing its bags for a well-deserved holiday. Further sure signs of holiday planning were the December peak in airline ticket booking among John Lewis & Waitrose *partnership card*TM customers and strong demand for swimwear, shorts and t-shirts seen from early January, as the nation sought sunnier climes.

Britain's own unpredictable weather

impacted purchases. A cold May meant picnicware sales took a nosedive, while sales of Alfresco tableware and sunglasses peaked in June during a mini heatwave, which also saw a mad dash for fans to keep the nation cool. Summerhouses and shed sales saw substantial increases this year, peaking in May, as the nation decided that poor weather would not stop it making the most of the garden (See *How we live: Outdoors*).

Public figures in the media also influenced buying patterns. A young Royal held court in the children's fashion stakes, with Prince George's traditional outfits leading to increased sales of boy's navy knitted jumpers by 69% and red cords by 60%. And when Princess Charlotte's Royal Christening took centre stage in July, sales of the John Lewis Christening category rose by 175% compared to last year.

Other familiar faces causing a ripple effect in trends included David Beckham, whose extravagant 40th birthday celebrations in Marrakech were reflected in customers' choice of Moroccan inspired tableware, (although a wider international eating trend was also responsible for this, see page 19). In June, Kate Moss prompted a surge in preserving kit sales of 38% when the supermodel announced plans to sell her own homemade jam at this year's Glastonbury. Meanwhile, this year's blockbusters were the inspiration behind the toys of choice, with Minions flying off our shelves and a huge spike in web searches for the little yellow fellows in December.

It was also an important year for the nation's health and wellbeing. This movement is not about adhering to an ideal body image (as the backlash against April's controversial "Beach Body Ready" protein shake ad proves), but more about people feeling happy, well and confident in their own skin. Spiralized vegetables as a replacement for carbs took the nation by storm over summer, following the extremely successful cookbook launch from Hemsley & Hemsley. Runners were spotted all over the country, with sales of men's running tights increasing by 64%. A more mindful approach to exercise was also evident. As the nation "sun saluted" and "namaste'd" its way to a calmer headspace, sales of yoga mats from John Lewis rose 28%. (See *How we live: Well*).

Finally, a strong theme from the year was the increasing influence of social media on the country's style choices. From working out to planning a showstopping wedding, this was the year that customers were their own stylists, interior designers and wedding planners. (See *How she looks, How we live and How we celebrate*). And when all the social media insights became too overwhelming, customers turned to Partners in our shops, whose trusted advice gave them the confidence to make stylish choices for their homes, wardrobes and lifestyles. (See *How we shop*).

Spiralizers cause a summer sensation



¹ JL research 2015

The events that influenced us in 2014/15

August Bake Off's back

With the return of *The Great British Bake Off*, baking fever swept through Britain once more, sparking a 141% uplift in cookie cutters.



November Black Friday

Black Friday saw our highest volume of sales in our shops and online. Ladies' premium handbags made 25% of their entire year's takings on that day alone.



November Monty the Penguin melts hearts

Enter Monty, the star of the John Lewis Christmas advertising. The fluffy penguin was the most popular search term on our website over the festive period and the Monty Christmas app was downloaded 458,000 times.



2014

August Autumn bites in August

John Lewis saw sales of filled duvets increase by 66% compared to last year, while demand for gloves more than trebled, rising by 209%.



December Sole searching

Slippers were the third most popular web search terms this Christmas, with customers preparing to put their feet up over the festive season.



February Oscars inspire bright suits

The Oscars saw a rebellion against the black suit. Eddie Redmayne was among those famous faces shying away from black by sporting his best blue suit. Our non-black suit sales were up 10% year-on-year.

February Fifty Shades of Play

The *Fifty Shades of Grey* film launch inspired customers, with the Idalia Black Playsuit by L'Agent Provocateur rising in sales by 93%, suggesting the John Lewis customer is more risqué than ever.



March Summer starts early

Swimwear sales rose unseasonably early to 22% on last year, suggesting summer holiday planning was in full swing.



March Gin takes the nation's fancy

The Wine and Spirit Trade Association announced in March that sales of British-produced gin rose 18% over the past two years. Our gin sales have increased 100% on last year.



June Jurassic fever

The launch of the new *Jurassic Park* film saw sales of dinosaur toys increase by 50%.

June Grexit threat

June was a popular month for buying John Lewis Foreign Currency and the Euro was the most popular currency exchanged in our shops, as tourists concerned by unstable banks in Greece took cash on holiday.



March We want plates

The international #wewantplates social media movement helped spark a sales uplift of 18% in plain white dinner plate sales.

May General Election

Sales of big ticket items took a dip in the run-up to the Election as customers held off on significant purchases until they were certain of the results.

May The UK goes spiralizer crazy

Courgette sales rocketed in May as the spiralizing trend went mainstream, with John Lewis Oxford Street selling more than 100 spiralizers a day at its peak.



June Mini heatwave

The last week of June saw sales of fans rocket by 1300% compared to the same time last year, as the UK experienced a mini heatwave.



July Princess Charlotte's christening

The appearance of the royal pram at the Christening sparked a 30% increase in traditional Silver Cross pram sales.

2015

January Britain packs its bags

John Lewis & Waitrose partnership card customers spent 36% more on holidays in January compared to the annual monthly average, potentially looking to fend off those winter blues.



The five products that defined the year

The NutriBullet

We sold one NutriBullet every four minutes and these nifty blenders topped the wish lists of many of our online customers, suggesting a growing desire among the nation for a healthy, balanced diet.



The record player

The record player epitomized the UK's "tech-nostalgia", with its retro styling and modern functionality. Pictures of these artfully styled turntables punctuated many Instagram, Tumblr and Pinterest feeds, inspiring a seventies vibe in the nation's homes.

The spiralizer

Offering firm proof of the nation's health kick, spiralizers sold in their thousands every week, replacing bowls of pasta with healthy 'courgetti spaghetti'.



The skinny blue suit

Blue suits were the choice for men across the country, from grooms and ushers to newsreaders. We saw a 75% increase in blue suit sales.



The garden room

The UK is reported to be living in Europe's smallest properties. This, combined with a dreary summer, meant that people chose this year to upgrade their outdoor space. Crane buildings were our best selling range, with sales rising 130% from last year.



What we left behind this year

The things we leave behind in any given year are as much a sign of the times as those we embrace. This year, those lesser purchased items included crystal stemware, linen and bookcases.



Crystal stemware

Often associated with formal dinner parties and royalty, crystal stemware is proving less popular for customers' favourite tipples, although it is still reserved for those special occasions (and decanters are still on-trend for the nation's "young fogeys").



Bookcases

The rise of e-readers and the space limitations in the home meant bookcases saw a decline as we moved away from the paperback.



Formal silver tableware

With more informal eating trends such as bowls of pasta and sharing plates, the nation has lost its appetite for formal silver tableware.

Loom bands

Last year's Loom band craze bounced out of nowhere, but this year it's not so cool for school.



Thongs

We finally fell out of love with smalls in favour of big, comfy pants. No longer associated with Bridget Jones, the big pant is now beautiful.



Corded phones

As we launched our own mobile handset offering this year and Apple Watch marked the latest development in wearable mobile technology, corded phones continued to drop off the line.

Bread-makers

The knead to make our own bread continued to rise, with *The Great British Bake Off* encouraging consumers to ditch their breadmaker and start baking a loaf from scratch.



Linen

High maintenance linen lost out to easy-to-wear denim, which yet again won out in the fabric stakes. Denim was so hot this year people started double-deniming up, rocking denim combinations, including jeans, jackets, skirts, dresses and shirts.



Fishnet stockings

Fishnets had a sales peak in December, but not even the launch of *Fifty Shades of Grey* was enough to save them, with hold ups to sales meaning they have officially legged it off the fashion charts.



Chapter Two: How We Shop

Omnichannel shopping has come of age. Sophisticated shoppers no longer have a preferred way to shop, they mix and match how they research, buy and receive their purchases to create ultra-personalised shopping journeys. We are witnessing the rise of the “Master Shopper”.

Cast your mind back five years. Our Click & Collect service had just launched and only 17% of John Lewis sales came from online. It was also the year that the iPad arrived and Instagram and Pinterest launched. Since then, online sales as a proportion of our total sales have doubled. So while it may feel like the norm today to scour social media for inspiration, browse on a tablet, price-check on a mobile and collect from a shop, the omnichannel shopper has come of age.

Meet the “Master Shopper”

2015 was the year that shopping got serious. After several years of getting to grips with all of the different ways modern shoppers can browse, purchase and collect their goods in an ever-evolving omnichannel world, a new breed of supremely confident shopper has come to the fore. The modern “Master Shopper” knows how to find the right product, at the right price, available how, when and where they want it, in the ultimate bespoke shopping experience.

This new expert shopper has no issue with multi-screening and interchanging their phones, tablets and PCs to suit their needs. The proportion of traffic to johnlewis.com from mobiles increased to 60% in the last twelve months and mobile revenue grew a significant 68%. This channel has not yet reached peak usage and ongoing developments will make the experience even more engaging.

The omnichannel “Master Shopper” has learnt to combine channels to achieve the optimum shopping experience. Two thirds of our customers use both physical shops and online channels and the number who bought from both channels increased by 9%. We expect this number to grow in the coming years. Collection options are also increasingly flexible, with Click & Collect now the fastest growing method, accounting for over half of online orders.

With all these options creating a more flexible journey, shopping today is less about “I need it now” and more about “I need it how, when and where I want”.

Masterful shopping

The “Master Shopper” expects shops to fulfill a new role in a particular shopping journey. While shops still serve a ‘need it, buy it’ purpose, they are increasingly linked to leisure time. An element of pleasure, inspiration and surprise has returned to the art of shopping.

As well as picking up a Click & Collect order and getting invaluable advice from our Partners, customers can also indulge in a bit of pampering and “me-time,” such as getting their nails done or having a massage. In fact, overall sales of beauty treatments in our shops have increased by over 11%. This will only increase with the expansion of our &Beauty Spa in Birmingham, which provides more than 100 treatments across hair, beauty and spa ranges.

Customers can even book a holiday and exchange cash, with the introduction of foreign currency exchange in some of our shops. Our luxury travel partner Kuoni, with concessions in 11 of our shops, has reported an increase in holiday sales of 8% for the first five months of this year compared to last year.

Proportion of mobile traffic to johnlewis.com



Shopping missions uncovered

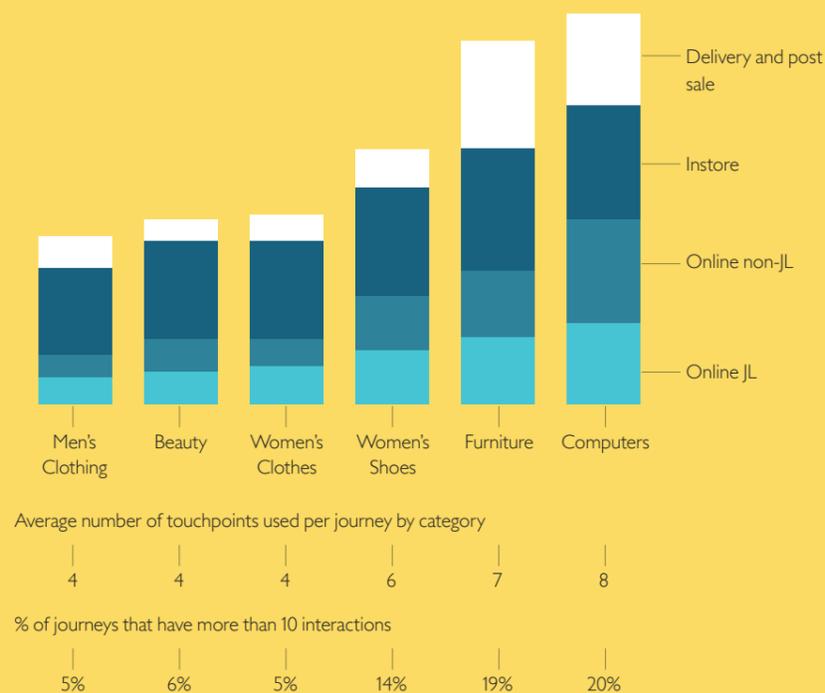
This flexibility means the mixing of shopping channels and how many times they are used can vary depending on what a customer is buying. For instance, customers interact with John Lewis an average of four times during the road to purchase for menswear. Within that, our shops make up two of those interactions, indicating that when shopping for clothes, men want a no-nonsense trip where they can visit a shop, speak to a Partner and take their new suit home that day.

At the other end of the scale, considered purchases such as white goods, furniture and computers take on average seven or eight different interactions. Nearly 20% of customers buying a computer have more than ten interactions during a buying journey. An average of three of those interactions involve online research on johnlewis.com or on other websites, indicating that when buying technology, "Master Shoppers" have a keen eye for the latest models and the best prices.

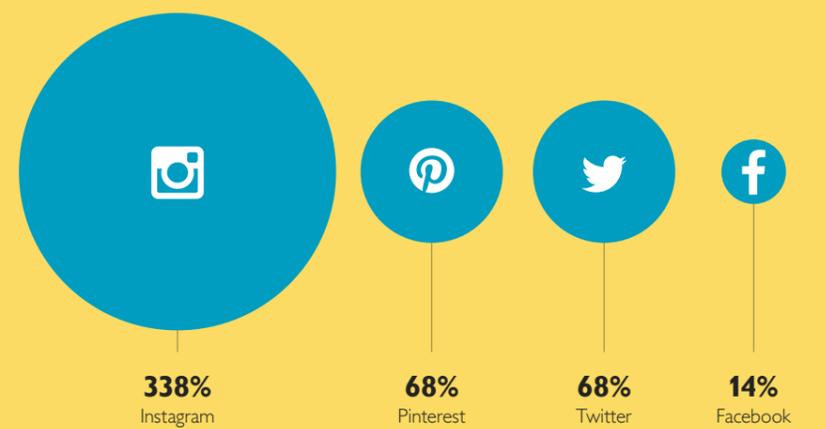
Social shoppers

Inspiration from social channels is an important part of today's shopping experience. Customers' willingness to turn to John Lewis for inspiration is fuelling significant growth in our social channels. Out of all of them, Instagram saw the most significant increase in followers over the past year, although Facebook is still our most popular social channel. The stars of our Christmas advertising, John Lewis Monty & Mabel stuffed penguins, were our most popular purchase fuelled by social media.

How many times a customer interacts with the brand depends on the product category



John Lewis social network growth since July 2014



John Lewis social channels in order of popularity



Last minute Britain

The shopping experience of 2015 is as much about convenience as it is about inspiration.

Our shops in busy transport hubs epitomise the need for fast, convenient shopping and have exceeded all performance predictions. Their success is a sure sign that customers continue to rely on John Lewis for the small but essential, last minute purchases, as well as more significant investments.

The top sellers from our St Pancras shop reveal those most forgotten items to grab before catching a train, (and a few little luxuries for the Eurostar).

1. USB travel adaptor
2. Sennheiser in-ear headphones
3. Cowshed the fab four giftset
4. Mini Champagne with jacket
5. Pink Champagne truffles
6. Apple lightning to USB adapter
7. Mini silver speaker, bose

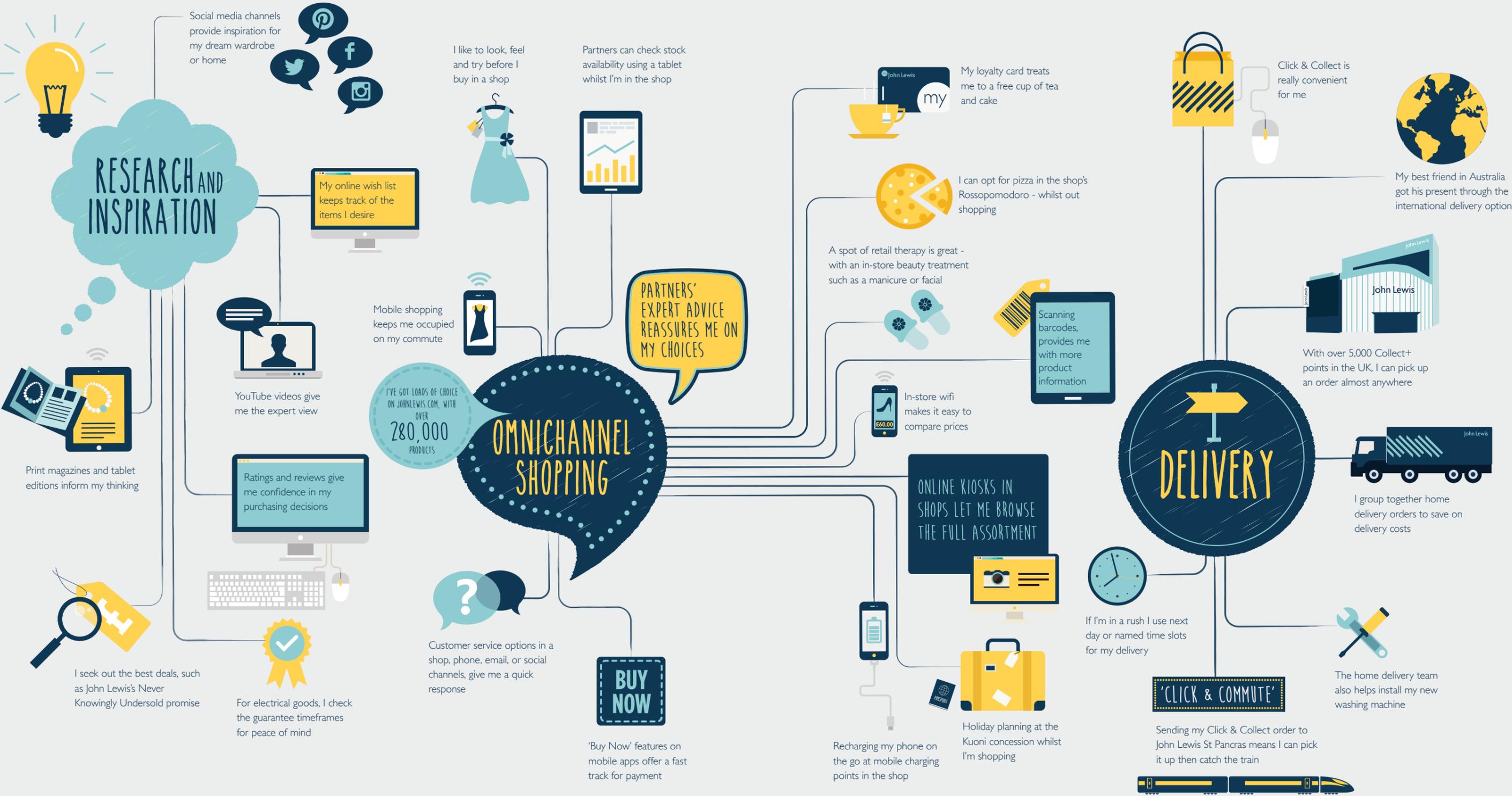
Sales of hardshell suitcases rose by

14%



Inside the mind of the "Master Shopper"

With so many options for research, browsing, payment and collection, here are some of the possibilities that go through the mind of the "Master Shopper" when deciding what, how and when to buy.



Chapter Three:

How We Live Indoors

The past twelve months marked a major turning point for the nation's homes. Customers abandoned neutral colour palettes and entered a more adventurous, glamorous era of interior design.

A new national obsession with home styling

Pinterest boards provided inspiration on every element of the home, while Airbnb showcased an array of enticing properties, raising the bar for people's own homes. In response, customers cleverly updated their abodes with small, stylish touches to keep rooms looking fresh and stylish. As a result of "the Pinterest effect", cushions, rugs, curtains and lighting were all among the top ten search terms of the year across our entire website. Customers were also more confident making design choices for themselves and wanted autonomy in their home styling. Our Colourbox rug service, which allows customers to specify their rug's colour, textile and pattern, saw a 33% increase in orders on last year. The same was true of upholstery, where customers opted to choose the style and fabric of bespoke items, such as armchairs and sofas. This service saw a 10% lift in sales.

Illuminating the look

To showcase their stylish new interiors, customers went big on lighting. Statement pieces such as crystal ceiling lights increased in sales by 23% on last year and the average spend on lighting increased by 6%. More adventurous lighting preferences were also evident in choices of warm copper and brass finishes, epitomised by the strong sales of progressive designs from Tom Dixon in a palette of metallic colours.



Those finishing touches for a quick-fix makeover all increased in sales

- Mini houseplants: 888%
- Metal table lamps: 52%
- Ready made curtains: 19%
- Rugs: 14%
- Black picture frames: 8%



Luxurious lighting

This Crystal pendant light fitting increased in sales by 235%, as customers added a touch of glamour to their living rooms.

The seventies were back

A consequence of the new national flare for interior design was that kitting out a home became more closely linked to fashion trends, with “Young Fogies” scouring the shops for a retro look to match their wardrobes. The seventies was en vogue on the catwalks of Tom Ford, Prada, Pucci and Gucci, as well as in home decor. This meant strong sales of patterned wallpaper in retro shades of brown and orange and the return of the pouffe, macrame cushions, and sleek, minimalist wooden cabinets. But rather than recreating the living rooms of their parents, the younger generation modernised and personalised the look, with utility lighting and neutral throws to counterbalance the use of bold, block prints.



Wallpaper sales increased by 11%. Kitsch and colourful was on trend, with Orla Kiely's Multi Stem print a top seller



Wood panelled chairs swivelled back into fashion. The Vitra Eames lounge increased in sales by 758%

Pouffe sales increased 30% on last year. Our best seller was the House knitted pouffe

Investing in beautiful design

As well as enjoying fun home fashion trends, customers invested wisely in statement pieces of high quality furniture to give a strong focal point to a room. Through our Design Collective range we collaborated with some of the best design talent from across the world, with sales of the range increasing by 6% on last year. Danish designer Ebbe Gehl's distinctive Scandi-style dining furniture in pale oak was a particular success, increasing in sales by over 9%. Bethan Gray's Genevieve

bedroom range, with its elegant structures and understated designs, sold 36% more than we forecast. Further evidence of a willingness to invest more in key pieces was seen in the increasing average spend on sofas, which is now over £1000, compared to 2012 when it was approximately £870. Across the entire directorate, furniture sales have risen 6%.

With the frenzy of home styling activity, it was the perfect time for us to increase our

home footprint through the multi-million pound makeover of the home department of John Lewis Oxford Street. (See *How we shop*) We now offer the largest range of homeware in any UK store and will continue to help customers express themselves in the home as the nation takes its styling credentials to the next level.

Wanderlust inspired home styling

Britain was bitten by the travel bug and packed its suitcase for warmer climes. Our luxury travel partner Kuoni has reported one of the strongest sales performances for a decade, with holiday sales for the first five months of this year 8% up year on year. Our Fusion range captured a worldly zeitgeist, bringing a touch of exotic colours, patterns and textures to the UK's homes.



Italy

As the sixth most popular Kuoni destination, customers took inspiration from Italy's classical beauty. The Spode Blue Italian tableware range was pride of place on many dining tables.



Switzerland

With Switzerland being among the top twenty Kuoni holiday destinations, customers went crazy for cuckoo clocks. The Ettore Cuckoo Clock by young designers Diamantini and Domeniconi was a standout best seller.



Scandinavia

This pared-back Shalstone Dressing Table epitomises the Scandinavian look, which dominated our furniture sales this year.



China

New this year, the cast iron oriental teapot was a bestseller within the Fusion tableware range.



Mexico

The mini short cactus from our gift range increased 1486% on last year, perhaps inspired by Mexican holidays, with Mexico the tenth most popular Kuoni holiday destination.



North Africa

The tribal-inspired Da Terra Folklore range has increased in popularity, including these colourful cups and bowls.



Egypt

Handmade in Egypt, this exotic pendant light is a new product this year and has already proved popular.



Thailand

The lotus flower tealight holder increased 584% this year, inspired by customers' trips to Thailand, which was the second most popular holiday destination, according to luxury travel agents Kuoni.



Iran

This Persian Indian Blue wallpaper was the best selling wall covering this summer.

An appetite for global cuisine

The nation's culinary tastes were also inspired by their travels this year as customers stepped up to the hotplate to try their hand at recreating everything from Mexican to Japanese cuisine. The BBC's popular *A Cook Abroad* series in March, and the crowning of Indian eatery Dishoom as the UK's best restaurant acted as further proof of Britain's global culinary appetite. As well as providing the kitchen gadgetry to help the nation steam their dim sum and

infuse their tagines, we also helped create the look for the table, as exotic dinners from around the world were served on Moroccan printed placemats, delicate Chinese bowls and metallic plates from our Bombay Cafe range.

Oriental tableware was our best-selling range, with sales of chopsticks doubling in February, coinciding with Chinese New Year.

Tech in the home

This was a year of “tech-nostalgia”, with retro-styled home tech on-trend, while advanced functionality brought classic designs into the twenty-first century

In with the old

This year marked a shift in the design of home technology, with the increasing popularity of nostalgic designs in radios, cameras, headphones and turntables harking back to the 50s, 60s and 70s. This “tech-nostalgia” was seen most clearly in the UK’s vinyl revival. Vinyl album sales were up 69%¹ and our record player sales increased accordingly by 36%. The aesthetic look of turntables was key, with artfully styled record players littering Instagram, Tumblr and Pinterest. These social channels had a significant role in fuelling this trend, giving people access to a whole new level of design inspiration for home technology, (although we are not yet preparing ourselves to re-introduce Walkmans and typewriters at John Lewis).

Not only did retro tech need to look good, customers demanded modern functionality, such as internet connectivity, wireless charging and USB portals, as well as the best in audio quality. Customers were prepared to invest more to achieve crystal clear sound, with spend on audio equipment increasing 10%. With 91% of the UK still listening to the radio every week², retro radio designs from Roberts were top sellers. But the crackling sound of the “wireless” of yesteryear was no match for the sharp sound quality of today’s digital radios.

Top retro tech

All over the UK people were kitting out their houses with stylish retro tech. Here are some of the most popular choices.

The headphones

On-ear headphone sales increased by 14% this year. Sennheiser Momentum headphones took a seventies style and modernised it, making them compatible with mobiles, tablets and MP3 Players.



The record player

We’ve increased our range of record players significantly over the past year to cater for the vinyl revival. The Pure LP Turntable in a wood finish is the most popular turntable, with sales increasing 34% on last year.



The camera

Cameras were modern in material but classic in shape and design. In reaction against the age of digital photography, Lomography Camera sales increased 243% on last year.

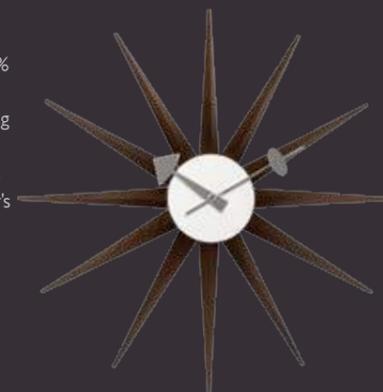
The radio

This year we introduced the Roberts Revival Digital Radio which was an instant success.



The clock

We have seen a 41% increase in retro wall clocks, including the Virtra Sunburst Clocks, a re-edition of a 1950s collector’s piece.



The speakers

We added Marshall speakers to our range this year. Behind their classic rock’n’roll design sits modern functionality, including Bluetooth to connect them to a smartphone or tablet.



But also in with the new

Setting “tech-nostalgia” aside, there were plenty of reasons why technology in 2015 was exciting and inspiring, such as the phenomenon of the 4K TV. 4K TVs, with their exceptional picture quality, now represent over 60% of our TV sales. Curved TVs, which make the picture feel more 3D and create the effect of a bigger screen, were also in high demand, with the

Samsung curved model increasing in sales 195% on last year.

This year, another milestone was our move into the SIM-free handset market. This was a direct response to a high volume of searches from customers for smartphones on our website. The recent launch of the iPhone 6s and 6s Plus make this an exciting time to be entering this space and our Partners’ ability to offer trusted advice to customers on the right choice for them gives us a clear differentiator in this crowded market.

Finally, many customers turn to John Lewis

for the latest toys in tech (regardless of their age) and we were particularly excited to sell our first drones, a sure best-seller this Christmas. Adding to the fun of tech, it was the year that action-seeking, waterproof, freezeproof and shockproof GoPros flew off our shelves, and Selfie sticks sales rocketed, while the John Lewis splash-proof shower radios (part of a new own brand audiovisual collection) were a runaway success. So whether customers want to sing in the shower, find the perfect handset or fly drones in the garden, our technology continues to evolve and adapt to their lifestyles and tastes.

The top tech items on customers’ wish lists, scaled by popularity:



¹ Official Vinyl Charts, 2015 ² RAJAR Feb 2014 2015

Chapter

Four:

How We Live Outdoors

This year, it was all happening in Britain's own backyards, as people capitalised on their outdoor space, whether by creating an office in a shed, hiding away in a meditation sanctuary or building a pro-barbecue setup.

The weather this year was a key driver for outdoor investment, with more and more customers wanting to spend time in the garden. It motivated many to create practical, stylish outdoor living spaces to use in any weather. Outdoor sales at John Lewis increased by 25% on last year and formed an important part of our overall growth in the home market. Further proof that it is no longer enough to rely on a couple of deckchairs and a foldaway table for enjoying the garden came from a sales increase in premium outdoor furniture (sets of over £1000), which saw a rise of 41%.

Clever space usage

With the UK reported to be living in the smallest properties in Europe¹, people are increasingly making more of their outdoor living space. John Lewis has seen sales of outdoor buildings increase thirteen-fold since 2010, reflecting this desire to have more space. The wood panelled Crane range of summerhouses and sheds made the perfect multi-functional spaces and increased in sales by 130% this year, with the spacious three metre-squared summerhouse being one of the most popular choices. We heard from customers of a variety of uses, including artist studios, home offices and meditation huts.

A stylish place to lounge

It was not a case of function over fashion as interior design trends spilled into the garden. On-trend floor cushions in shades of indigo and mustard were scattered to provide an air of the exotic. Those who wanted to turn their outdoor space into somewhere to relax triggered an increase in outdoor sofa set sales, with sales increasing by 250% since 2009. Customers also invested more in mood lighting for the garden. Metallic light fittings in copper and brass tones were favoured, with outdoor lighting sales increasing overall by 11% on last year.

¹ Building Research & Information, June 2015

Britain finds some shed space

In 2015, Britain saw a boom in outdoor building sales. Interestingly, this year

49%

of the people buying sheds were women, suggesting that females could be encroaching on the traditionally male garden shed retreat.

+130%

Overall, Crane outdoor buildings



+67%

Crane summerhouse 3x3 sage



+28%

Garden pods



+26%

Traditional sheds



Gourmet garden chefs

Britain got serious about outdoor entertaining, as sales of barbecues priced at over £500 increased by more than 700% over the past five years, while the number of barbecue cooking accessories has also increased by 50%. A tasty feast merited an attractive table setting and here the nation did not disappoint. Table mats, mugs and bowls in primary shades of red, green and yellow dominated, while practical wipe clean tablecloths also saw a 16% increase. Firepits and chimineas complete the sophisticated setup for garden entertaining, with sales up by 75% over the last two years.

And so we saw how the garden was adapted to everyone's individual needs, from backyard bosses, to birdwatchers and beekeepers.

A record year for outdoor living

+231%

Big Green Egg premium barbecue sales up 231%



+31%

BBQs sales increased 31% as Brits embrace al fresco cooking

+25%

The outdoor living category was up by 25% since last year



Sales of outdoor furniture rose by

43%

Wholesome outdoor hobbies

A strong appetite for gardening was evident in our sales, with our garden gift ranges increasing by 111% and garden toolsets by 27%. Birdcare ranges in gifting were also popular, with the south west in particular seeing strong sales of nest boxes and bumble bee cottages.



Green shoots in the outdoor market

The year's peaks in spend for outdoor sales at John Lewis.

March

By mid-March spring officially sprung, bringing garden makeovers to the forefront of people's minds.

April

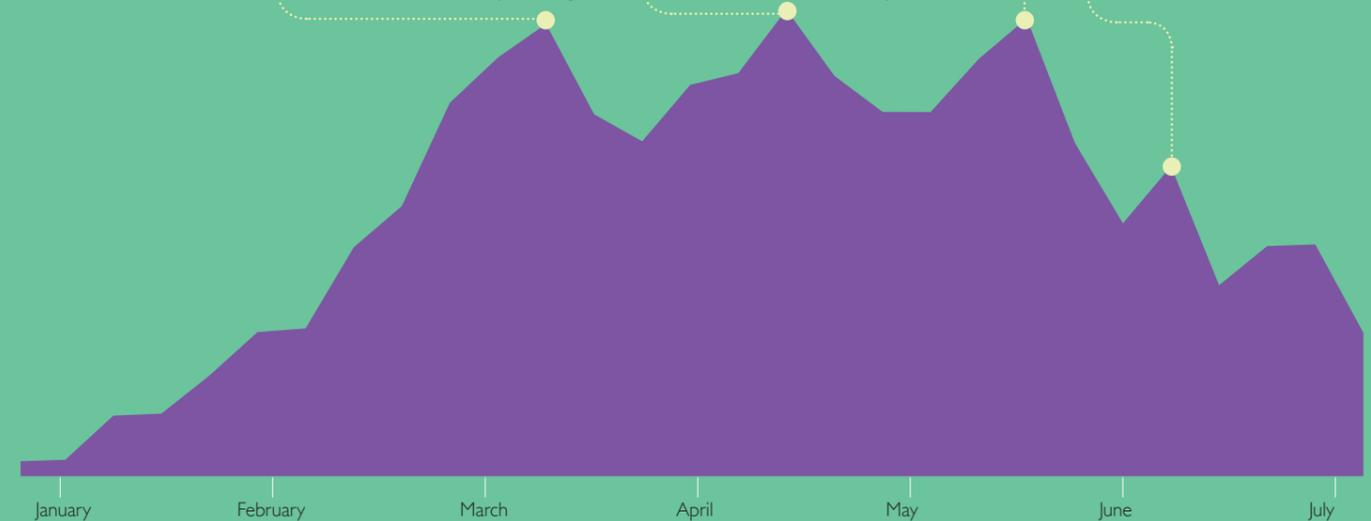
saw a peak in spending on gardening among John Lewis & Waitrose partnership card holders, up 16% against the monthly averager.

May

saw our sales peak as people made a dash to prepare their gardens for the two bank holidays (despite the wet weather).

Early June

saw temperatures in the UK reach 37 degrees, encouraging people to make more of their garden spaces.



Chapter Five:

How We Live Well

Customers are increasingly aware that every part of daily life, from sleep, exercise and diet to creating a relaxing environment in the home, are all important parts of looking and feeling good.

Look well

A healthy lifestyle is now a non-negotiable factor in many people's lives and we saw firm evidence of the nation's fitness drive in our sales of sports equipment, which increased 11% on last year. Women's sportswear sales were particularly strong, with a 27% increase compared to last year. Printed leggings and colourful sports bras both increased in sales (45% and 60%) as part of a confident, sporty look, mirroring the attitude of its owners. Not to be outdone, men fully embraced exercise, with sales of men's running shorts and running tights increasing 60% and 64% respectively on last year. MAMILs (Middle Aged Men in Lycra) were spotted across the country, partially thanks to British Tour de France winner Chris Froome, and spend on cycling items among John Lewis & Waitrose *partnership card* customers increased by 7% in June 2015, compared to the same month last year.

And with a focus on a calm state of mind, as well as a healthy body, many customers hit the yoga mat, with yoga clothing for women rising 40% from last year and yoga mat sales increasing 28%.

We used our social channels to fuel this national fitness drive, inviting fitness-loving bloggers to explore yoga, fitness fashion and the joys of the NutriBullet at our #JLLiveBetter event. Our event reached over 600,000 people via social channels, including over a million impressions on Twitter and over 150 photos shared on Instagram. This suggests a healthy appetite among customers to use their social feeds to source their "#gymspiration".



Wearable tech also became a bigger part of people's exercise regimes, with performance monitoring devices such as Garmin Activity Trackers becoming more sophisticated and tailored to specific activities such as running, swimming or golf. We saw a 52% increase in sales of these devices.

Alongside exercise, a holistic approach to wellbeing meant customers were increasingly aware of what they put on their skin and in their bodies. An example of this is the Organic Pharmacy range, where 60% of sales came from supplements. The growth in popularity of brands such as Murad, which combines scientific research with dietary supplements, and Origins' organic range are further evidence of a desire to 'glow' from the inside out.

All the gear

The John Lewis customer of 2015 was highly active, with fitness equipment and apparel sales rising:

- FitBits: 240%
- Manuka balls: 33%
- Yoga mats: 28%
- Sports bags: 10%
- Weights: 5%



Eat well

Healthy eating was the order of the day and customers prepared fresh, wholesome meals and nutritious juices and smoothies at home, with spiralized vegetables replacing bowls of pasta. Spiralizers sold in their thousands every week and we sold

one NutriBullet every four minutes, while sales of salad bowls also increased. Lighter thai and oriental food was also popular. As a result, we are soon to introduce a range of Ken Hom woks, chopsticks and steamers.

Live well

But it was not all about being active. Enjoying time relaxing at home in calm surroundings was equally important to wellbeing. A love of scented candles helped create a soothing, relaxing ambiance in homes across the country and our range rose 16% in sales from last year, with average spend on scented candles

increasing 41% in the last five years. The nation's favourite scents brought a touch of the outdoors into customers' living spaces, with fresh, floral and woody aromas the most popular. Customers also sought wallpaper inspired by nature, with picturesque landscapes and seascapes on-trend.

Sleep well

A good night's sleep is an essential part of feeling and looking good and it was clear from our sales figures that this was important to customers. As well as increased spend on sleepwear (See *How we look*), a willingness to invest in quality bedding helped the nation to rest easy. Average mattress spend has increased by over 20% in the last three years and sales of silk blend pillows rocketed, increasing 63% on last year.

Technology played its part here. We were the first to sell the Dyson Humidifier

this March, which removes bacteria and hydrates the air. Sleeping with a Humidifier on at night can soothe the symptoms of eczema, asthma, coughs and colds, giving babies, young children (and parents) a more peaceful night's sleep. Consumers also increasingly look for our Quiet Mark appliances, such as dishwashers, fans and extractor fans, as home spaces become more open-plan to avoid disturbing the quality of sleep.

Not only did people want to wake up feeling well-rested, they also wanted to

look better (and younger) than they did the night before. This had an effect on beauty sales, with pillow sprays and night creams performing particularly well.

From these sales trends we can see how customers spent the last twelve months attempting to get a peaceful night's sleep, adhere to a holistic beauty routine, and maintain a strict exercise programme. All signs that they are taking increased care in their appearance and wellbeing. Find out in next year's report if these intentions were long-term or short-lived...

Neal's Yard Sleep Concentrate

Sales rose 449% on last year, the fastest selling product from this brand

This Works Deep Sleep Body Therapy and Pillow Spray

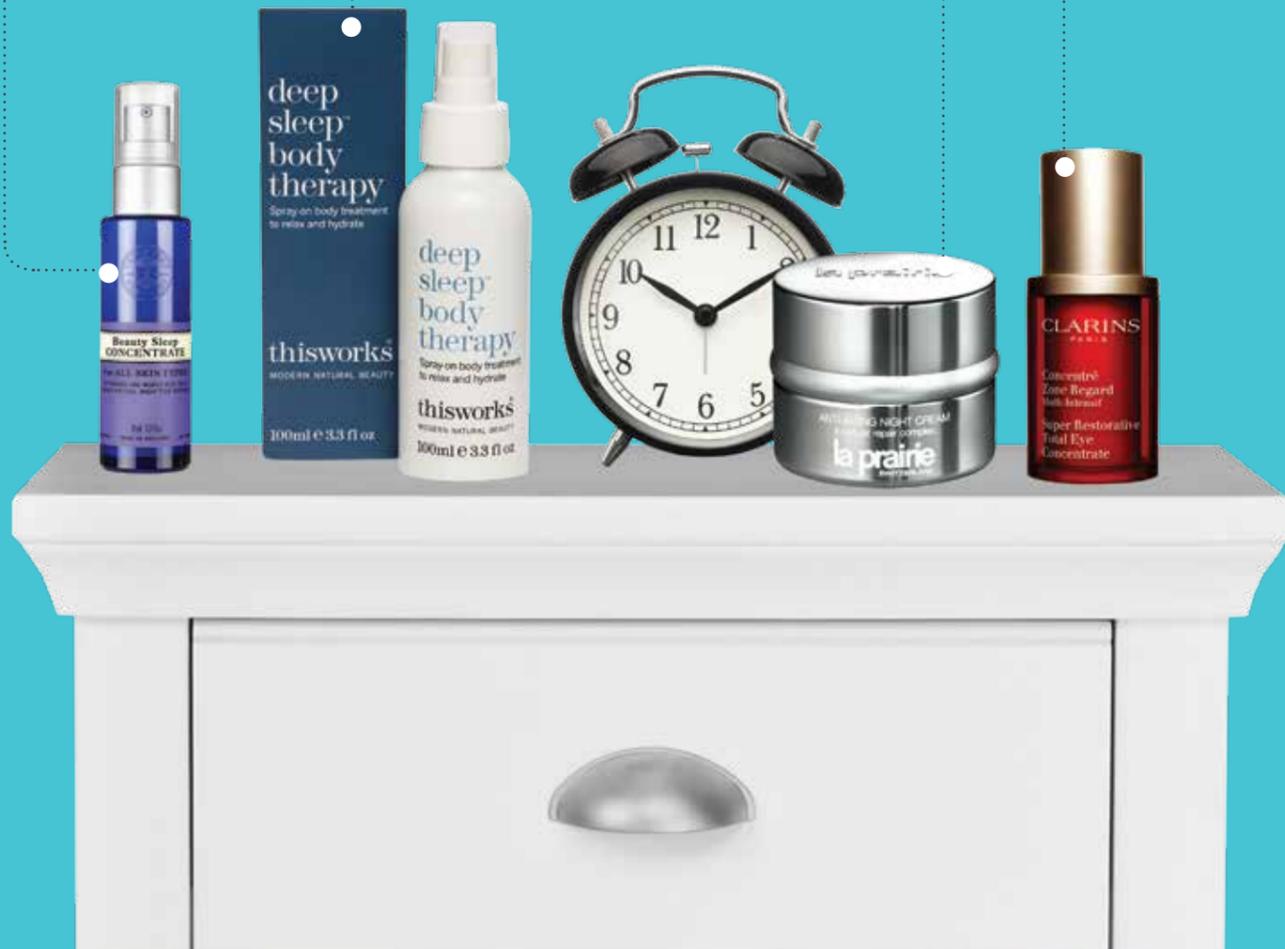
was added to our range, with resounding success

Anti-Aging Night Cream from La Prairie

(priced at £148) saw increased sales of 5%

Clarins Super Restorative Eye Cream

saw a sales increase of 65%



Wellness across the UK

While it was a national trend for customers to focus on their wellbeing, we saw some distinct regional differences.

Glasgow

Glaswegians hit the treadmill, with sales increasing 150% on last year



Liverpool

Liverpudlians wanted to look younger, and our shop here carried out the most Clarins Youth Activator facials



Tamworth

It was smoothies all round in Tamworth, as this area saw the biggest rise in Kenwood blender sales on last year



Solihull

Solihull customers watched their weight. This was the top selling destination for Family Health Monitor Scales

Bristol

Vitamix Blenders at Cribbs Causeway experienced the highest increase in sales across the country



Edinburgh

Outside of London, oriental scented candle sales were at their highest in Edinburgh, bringing Xen to the Scottish capital



Newcastle

Geordies liked to capture their active pursuits on camera. Newcastle saw the highest increase in sales of GoPros



Cambridge

The East of England, and in particular Cambridge, were among the top regions purchasing yoga mats



Norwich

In Norwich, they jogged on. Here we saw the highest increase in sales of treadmills



London

In London, customers wanted to breathe purer air, with the Dyson Humidifier seeing its strongest sales

High Wycombe

In High Wycombe they worked on improving their posture, with standing desks seeing most sales



Kingston

Luscious smoothies were a hit in Kingston, as we sold the most Nutribulleters here



Chapter Six:

How We Celebrate

This year the nation went to town on wedding celebrations, with enough bunting sold to stretch 50 times the length of St Paul's Cathedral.

A year of big weddings

Weddings came under the spotlight this year. TV series *Don't Tell the Bride* was promoted to prime time on BBC One. George Clooney and Amal Alamuddin's romantic Venice nuptials sent the paparazzi into a frenzy, and the extravagant wedding of *TOWIE* star Mark Wright and actress Michelle Keegan was widely covered. Same sex marriages were also on the global news agenda, with a landmark decision in the United States that same-sex marriages could no longer be prohibited. Social media played an important role in inspiring the nation's wedding choices, with celebrations bigger and more polished than ever before. The John Lewis wedding inspiration board is one of our most

popular Pinterest boards and now has over 10,000 followers.

The wedding look of the year was one of rustic perfection, taking inspiration from idyllic festivals, with outdoor ceremonies and swathes of bunting, as couples looked to recreate the looks they saw on Pinterest and Instagram. One in ten of our John Lewis Wedding Insurance customers planning weddings included marquee cover on their insurance policy, for instance. And sales of everything from paper honeycombs to candle holders climbed, showing every small detail was important for the big day.

Registrations for same-sex marriage and civil partnership gift lists have increased by

53%

since 2013.



The most expensive item to appear on a wedding list was a 4K Curved Smart TV from LG, priced at £3799.

Hot tech topped wedding gift lists

The items customers place on their wedding lists are a true sign of the times and John Lewis has long been the go-to destination here. With many couples already living together, technology, luxury items and experience gifts are all appearing more frequently on today's wedding lists. Requests for audio technology, including items such as Sonos and Bose speakers, increased by 13% from last year and 62% of wedding lists now include kitchen gadgets,

such as KitchenAids and NutriBullets. Crockery is still a gift list staple with white cereal bowls, pasta bowls, dinner plates and side plates appearing in the top twenty most requested items. Experiential gifts and charity donation requests also becoming more popular, while some of the stranger gift list requests include a toy crossbow... (See *Unusual gifts* graphic.)

Dressing for the occasion

Whatever the styling preferences of the bride and groom, Britain was dressed for the occasion. Men's formalwear saw an increase of 5% on last year, and black silk bow tie sales rose by 20%. (See *How he looks*). Ladies attended celebrations in style, with spend on occasionwear increasing 23% on last year. Sales of fascinators increased by 10% and our most popular fascinator was the Whitley Fine Mesh in black. This year, structured

shift dresses in bold shades were in and sparkly numbers were out, with sales of sequined gowns declining. Recognising the growing bridal fashion market in the UK, we expanded our bridal underwear range by 60% on last year, with the additions of ranges from CK and Freya. It is clear from this year of wedding fever that the nation is prepared to invest that little bit extra in making wedding days as special, enjoyable and memorable as possible.



Most popular wedding dress

The bride herself glimmered in the twenties-inspired Phase Eight Bridal Hope wedding dress, our most popular gown.

Wedding styling top sellers



Enough confetti for 42 million petals to shower brides and grooms across the country



Enough wedding photo albums for every member of 56 congregations



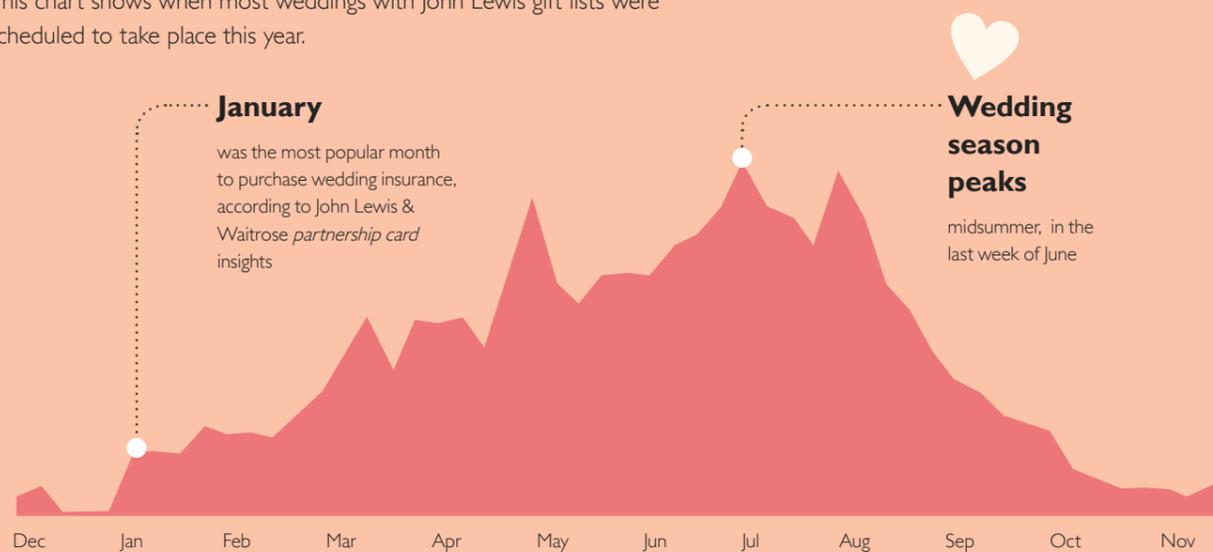
Enough wedding planning journals to stack the length of 227 church organs



Enough bunting to stretch 50 times the length of St Paul's Cathedral

Peak wedding week

This chart shows when most weddings with John Lewis gift lists were scheduled to take place this year.



The most unusual gifts

These were some of the stranger items to appear on customers' wedding gift lists

- Hello Kitty alarm clock
- Nerf Zombie Crossfire Bow
- Crème de la Mer moisturising cream
- Treadmill
- PlayStation



Global weddings

Perhaps inspired by George and Amal Clooney, exotic destinations for weddings were on-trend. John Lewis luxury travel provider Kuoni reveals the top destinations for exotic weddings and honeymoons:

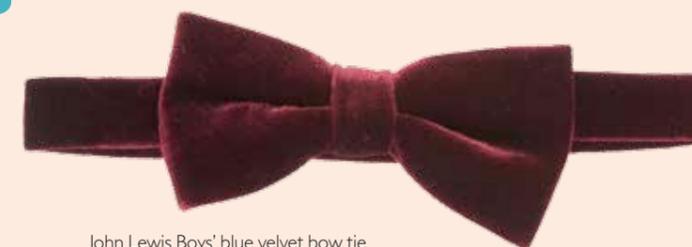
- Kuoni's most popular locations for weddings abroad
- Kuoni's most popular luxury honeymoons destinations



How little ones celebrated

The boys were traditional...

Boys were smartly dressed for formal occasions in Heirloom, a traditional brand, which saw sales increases of approximately 40% in ties, bow ties and braces.



While the girls went for a modern look

Girls were fashionable in skirts, shorts and tops, which were favoured over traditional party dresses. Metallic tops, sparkly shorts and skirts all sold out before Christmas.



Children's parties ramped up a notch in the celebratory stakes, with sales of party bags increasing 40% from last year.

Chapter Seven: How He Looks

Last year, bold and bright colours were big, with floral shirts, short shorts and eye-catching trainers seeing strong sales. This year, the look was one of understated sophistication with modern silhouettes and an autumnal palette in a range of quality fabrics.

According to our John Lewis & Waitrose *partnership card* insight, men spent on average 6% more than women on clothes this year. We already know that men are becoming increasingly style-conscious (see last year's report), but what did they choose to invest in this year?

A formal look was on-trend

The John Lewis customer was stylish but true to himself, choosing understated high quality formalwear. Stars in the limelight led the way in cultivating this look, from the ever-suave Benedict Cumberbatch and Colin Firth's snappy dressing spy in the box office hit, *Kingsman*, to David Oyelowo's eye-catching red Dolce & Gabbana suit at this year's Oscars.

The strong formalwear movement was epitomised by sharp and tailored suits such as those found in the Reiss and Kin ranges. Reiss was our fastest growing brand in men's formalwear, with sales increasing 40% on last year. Likewise, Kin formalwear sales increased by 20% on last year. And when dressing to impress, men weren't afraid to try something different, such as waistcoats and three-piece suits, both of which saw substantial sales increases.

Shades of blues and greys dominated formalwear last autumn and there was a 75% increase in navy and charcoal suits. But this autumn/winter green is the new black, from the lightest shades of fresh yellow-green to rich evergreen hues. Cashmere suits, coats, blazers, shirts, ties and socks will all provide warmth, comfort and an element of sartorial splendour.

Men spent the most on clothing in May¹,

(compared to women, who spent the most in September), suggesting a pre-summer wardrobe refresh.

The Kin Stamford Tonic suit in emerald green epitomises this season's green suit



Snappy dressers

- 137% increase in three piece suit purchases
- 100% increase in waistcoat purchases
- 20% increase in black silk bow tie sales
- 9% increase in shirt sales
- 5% increase in total spend on men's formalwear

¹ John Lewis & Waitrose *partnership card* holder data

The smart casual movement

This year, we've seen a significant shift towards contemporary design with exceptional quality and craftsmanship, led by exciting new brands from the Nordics. This trend responds to the fact that modern men want to look stylish and feel comfortable in all aspects of everyday life, without feeling like they're trying too hard.

As part of this Northern European style movement, we added Rains, a Danish outdoor lifestyle brand influenced by the Danish weather, and Bellerose, an up and coming Belgian brand which offers premium clothing for modern lifestyles. Standout items from these ranges include the Rains light blue waterproof jacket, which saw high sales.

Sales of short sleeved shirts increased by 40%, for a smarter summer



Men's running gear saw a 48% increase in sales



Denim was at the heart of a casual look

As with womenswear, denim was hugely popular this year, providing the wardrobe staple for our cool, casual male customers. Sales across all denim apparel increased by 12% on last year and the Double Denim look (otherwise known as a Canadian Tuxedo) was embraced. Classic Levi's 511s were the most popular jeans we sold, with the Levi's Slim Fit 511s, which match this year's sleek silhouette, increasing 50%.

Cool classics with a modern edge

Men also looked to classic style icons, perhaps inspired by the vintage and retro images widespread on Tumblr, Instagram and Pinterest. This led to a strong revival of some classic outerwear, including the bomber jacket and the Harrington jacket, made timeless by American style icons such as Elvis, Steve McQueen and Marlon Brando. A pair of blue jeans and a simple white t-shirt completed the ageless, authentic look.

So what's around the corner for this exciting time in men's fashion? After green and blue, will come black again as we predict a monochromatic look for spring/summer 2016. Think *Reservoir Dogs*-style skinny ties and slim-fit black suits. This look will see John Lewis men once again upping the fashion stakes, worn with a confident swagger and a pair of classic Ray-Bans.

The best quality pyjamas

Men didn't settle for second best in their sleep:

Sales of premium sleepwear (over £100) increased by 91%

Ralph Lauren sleepwear sales increased by 17%

Calvin Klein's lounge pants increased by 26%



The accessories

Men are paying attention to detail in their styling, with accessories sales increasing 13% on last year. The shoes: own brand Lloyd Suede Penny Loafers in brown increased in sales 41% from last year. The hat: panama hats increased by over 100%

Bombers saw a revival, inspired by the screen icons of yesteryear, with sales increasing by 30%



Chapter Eight:

How She Looks

Blue hues and denim dominated, while modern, statement pieces showcased individual style, with customers now preparing for a chic, tailored autumn and a seventies vibe.

The past twelve months saw a tipping point in womenswear. In previous years the main inspiration for customers' style choices came from the catwalk and the celebrities, models and actors who wore these designs. This year images shared via social networks such as Instagram, Facebook and Pinterest were more influential than ever in shaping what our customers wore, (although the influence of the runway still endures).

The plethora of social media inspiration meant customers acted as their own stylists, making confident choices about the looks that worked best for them. We saw our mobile womenswear sales increase by 86% on last year, evidence of a more impulsive, 'want it now' approach fuelled by the instantaneous nature of social media. Our own Instagram feed connected with a younger female audience, with activities such as The Edit spotlighting trends at the forefront of fashion.

The social media tipping point had a strong influence on beauty sales too, with "vloggers" (video bloggers) such as Zoella, Tanya Burr and Sali Hughes showing the world how to create the perfect waves and apply BB cream. As part of this movement, we introduced a new range from beauty vlogger and makeup artist Charlotte Tilbury, whose video tutorials guide viewers step-by-step on creating specific looks. We will be building on the range with more Tilbury beauty counters in our shops next year.

And for those who felt bombarded by style ideas, our shops provided a safe haven in which to make bold and stylish choices through a carefully curated selection of seasonal contemporary pieces.

What's hot right now

This autumn, a monochromatic, tailored look will inform the wardrobes of stylish ladies. Anticipating this, a new collaboration with couturier Bruce Oldfield offers

an exclusive range of modern classics. Highlights from this include a glamorous wrap design coat with a cinched in waist and faux fur trimming, a classic little black dress with a chic seventies vibe and a feminine, monochromatic evening dress crafted in silk and wool. It is this level of attention to detail in premium fabrics that our customers look for today.

Over the next few months we'll see the 1970s trend in womenswear reach its peak. As early proof of the era's popularity, platform shoe sales increased 14% on last year. Ponchos, long skirts, cords, suede and flares will be on trend, in shades of coffee and caramel. Fringed handbags and leather patchwork bags will accessorize the look.



Bruce by Bruce Oldfield contrast dress



Bruce by Bruce Oldfield wool silk panel dress



Bruce by Bruce Oldfield faux fur coat

The jumpsuit

A standout success of the year has been the jumpsuit, with an increase of 279% in sales of John Lewis own brand. This follows our prediction last year that the jumpsuit would be on-trend for Christmas 2014.



Denim was everywhere

A key element of the seventies look is, of course, denim. This was undoubtedly the fabric of the year. With the right denim, customers could navigate their way through more daring statement tops and coats. We also recognised a desire among customers to invest in higher end denim and responded by partnering with premium denim specialist Trilogy. The initiative brought their renowned product selection and extensive expertise to our website and Peter Jones shop. Sales of Trilogy jeans are already 32% higher than predicted.

Blue was the colour

Building on the nation's denim infatuation, blue was the colour of 2015, in every shade from sky to navy. Complementing this was an increasing attraction to white, with sales 51% higher than last year. Previously, customers shied away from white, perhaps due to its reputation as a shade that works best on the tanned and toned, but this year they had the confidence to go for it. Accompanying a subtle palette, bold prints were on-trend but, as predicted in last year's report, the clashing florals of spring/summer 2014 were replaced by more abstract and painterly patterns inspired by the designs of Kenzo and Burberry. The Kin Osaka print dress and Brushstroke print scarves epitomised this trend.

Loungewear was luxurious

This year "loungewear" (comfortable clothing for wearing at home) was understated but luxurious in fabrics such as silk, cashmere and sheepskin. Sales of luxury cashmere wraps, perfect for snuggling at home, increased 100% year on year. Sleepwear was pared back and equally as luxurious. Ugg slippers were the third most popular women's shoe, increasing 4% on last year and classic spotted pyjama sets rose 7% in sales. Keeping up appearances in both the physical and virtual world could be a factor here, (#pajamas and #pyjamas combined have over a million posts on Instagram!)



The skirt

Hemlines dropped, as on-the-knee skirts were replaced by a mid-calf length.

The face

In beauty, emphasis was on the eyes. Mascara sales were strong, with Lancome Grandiose Mascara selling 148% more than predicted.

12 statement pieces from the year

2014

August

A cold August saw an early peak in cashmere sales.



September

It was back to work and school, with white shirts sales increasing.



November

Black Friday saw handbag sales peak. Among the most desired were the Mulberry Bayswater and the Michael Kors Selma satchel.



October

Winter coat investments were on the rise. The Barbour Beadnell Waxed Olive Jacket is our most popular item in all of womenswear, with sales increasing 24%.



December

In anticipation of the party season, this Somerset by Alice Temperley dress was one of our best selling evening gowns. We saw a 1600% increase in its sales the week after Fearne Cotton wore it on BBC's Children in Need.



2015

February

This delicate gold pendant from Alex Monroe was our most popular Instagram post this month, as customers looked for the perfect accessories for their looks in February.



April

Pointed toe flats were the statement shoe of the month, with our Instagram post featuring the season's stylish flats seeing the most likes that month.



May

Formal hat sales peaked in May as ladies prepared for Ascot.



June

Espadrilles saw a summer revival this year, with sales of own brand increasing 34%.



July

One piece swimsuits were on trend in July, with enough sold throughout the summer for 800 Olympic synchronised swimming teams.

Chapter Nine:

Looking Ahead

Our predictions for how the nation will shop, live and look in 2016.

Virtual Reality will become a reality

We have been talking about it for a long time but next year virtual reality technology will become a lot more affordable, with more content becoming available in areas such as movies and gaming.



Black and white will be on trend

In menswear, we expect the return of monochrome, with Mod-esque skinny black and white suits seeing gentlemen through to the summer season.

Pink

An eighties flashback: pink is the big colour of 2016 and will be included on statement sofas as well as home accessories.



Smart kitchens will take off

Technology will take the hassle out of meal planning and cooking, with fridges that let you know when produce goes out of date, what's "in-stock" at home and suggested recipes.



The seventies are here to stay

This autumn's 70s trend will still be going strong into 2016, with the predicted return of knee high boots, kaftans and ponchos, along with a love of paisley and other delicate prints likely to prevail. The return of the flares may see skinny jean sales wane.



THE JOHN LEWIS RETAIL REPORT 2015

HOW WE
SHOP,
LIVE
& LOOK

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