

# HOW WE SHOP, LIVE AND LOOK



THE JOHN LEWIS  
& PARTNERS  
RETAIL REPORT 2018

# 18

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# INTRODUCTION

In the sixth edition of the John Lewis & Partners Retail Report, we take a look back at what has undoubtedly been one of the most challenging years retail has faced.

In the midst of all the uncertainty, one clear thing emerged. To thrive as a retailer now, let alone in the future, you must not only stand out from your competitors but you must also stand for something more. Read on for an overview of how we shopped, lived and looked in the last year.

Uncertainty dominated this year, as the high street faced not only difficult trading conditions but low consumer confidence. In the most promotional market for almost a decade, distressed retailers discounted more than ever and questions surrounding Brexit affected the value of Sterling. The business rates debate hit the headlines and the housing market was subdued as Britons put a halt on moving house.

John Lewis & Partners wasn't immune from these challenges and our half year results reflected the impact of holding true to our Never Knowingly Undersold price promise through the good times and the bad.

This was a transformative year and the tough retail landscape forced us to take stock and reflect on who we are as a brand and what we stand for.



**SIMON COBLE**  
Partner and Trading Director

But unlike some of our competitors, we are a business determined to play the long game, with a unique ownership model that provides a strong foundation and an ability to think long term.

This year was all about identity. Who we are, what we say, what we care about. Individuality and individualism. What we bought and why we bought it took on a new meaning - it was how we made a statement about who we are.

And the idea of identity also became central to John Lewis's long-term plans - feeding into a unique opportunity to build a business that is even more differentiated and relevant.

The decision to add '& Partners' to our name is much more than a change of logo - it is about celebrating a truth that has always been part of our brand. That the people who work for this business are more than employees, we're owners. And that is why we are continuing to put people at the heart of our business.

This new identity filters down into everything we do - from providing personal and personalised service, to offering unique products which allow customers to embrace their own individuality whilst staying true to who they are and what they stand for.

Identity for John Lewis & Partners is all about celebrating what makes us different and helping shoppers celebrate everything that makes them unique.

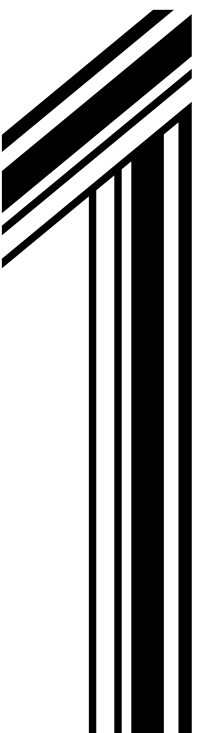




# WHAT SHAPED THE WAY WE SHOPPED

This was a year of uncertainty, with tough times on the high street, continued political disputes over Brexit negotiations and some of the most extreme weather we've seen in decades. With the world around us in such a state of flux and change, the desire for individuality and a strong sense of self became more important than ever.

But in the midst of these uncertain times, the summer gave us something to be cheerful about as we decorated our houses with bunting and balloons to celebrate the Royal Wedding and watched the England team battle their way towards the final of the World Cup.





# TIME — LINE OF THE YEAR

18

17



## OCTOBER

### ENVIRONMENTAL

Blue Planet II airs on BBC1 and becomes the most watched TV show of the year. The final episode's call to action on reducing plastic waste inspires people around the country to act more sustainably. In the week the last episode aired, John Lewis sees an increase of 1700% in searches for sustainable coffee cups.



## NOVEMBER

### TECHNOLOGY

Apple launches its most expensive smartphone to date – the iPhone X. The £999 phone sells out on our website in just 40 minutes.

### ROYAL ENGAGEMENT

HRH Prince Harry and Ms Meghan Markle announce their engagement and Meghan's position as a global style icon is set in stone. After she wears nude strappy heels in an engagement interview, natural and nude heels sales rise 26%.



## DECEMBER

### DECORATION

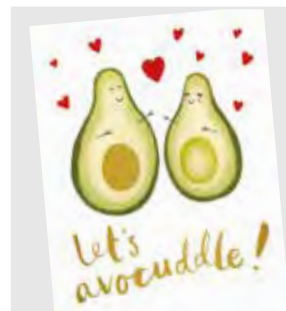
Tinsel is the year's hottest Christmas trend, with sales up 90%. It proved so popular John Lewis introduced tinsel tutorials to teach shoppers how best to style it.



## JANUARY

### VEGAN CHOCOLATE

Veganism becomes such a big trend, January is re-named Veganuary.



## FEBRUARY

### VALENTINES DAY

Who said romance was dead? Valentine's Day proves more popular than ever, with cards up 148% on last year.

### 100 YEAR VOTE

Women across the UK march together to mark 100 years since the first British women won the right to vote.



## MARCH

### BEAST FROM THE EAST

The extreme cold weather, dubbed the 'Beast from the East' continues until the middle of March affecting footfall and sales on the high street. However cold-weather products got a boost with boots up 63% and hats and scarves up 20%.



## APRIL

### GENERATION Z YELLOW

The snow thaws, spring arrives and sunny Generation Z Yellow becomes the new Millennial Pink.

### JOHN LOUIS

A new member of the Royal Family arrives - Prince Louis of Cambridge. John Lewis changes its name briefly to John Louis on social media.



## MAY

### ROYAL WEDDING

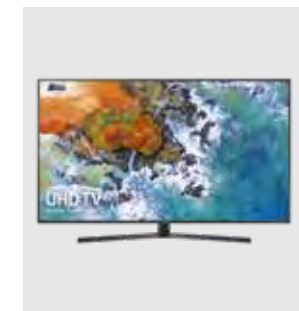
Prince Harry marries Meghan at Windsor Castle, watched by 18 million Britons. Sales of occasion wear hats rise 33%.



## JUNE

### LOVE ISLAND

The new season of Love Island kicks off on ITV and the nation is hooked. Sales of Elemis Tan Accelerator shoot up 51%, sales of thongs soar by 72% and suspenders by 132%, while men's swimwear goes up 33%.



## JULY

### WORLD CUP

The England football team goes from strength to strength, eventually making it all the way to the semi-final of the World Cup. After England win against Colombia, TV sales rise 49%.

### TOUR DE FRANCE

Fans watch as Geraint Thomas becomes the first ever Welsh rider to take the title. Sales of the Pro 5.0 Indoor Studio Bike shoot up 79%.



## AUGUST

### TROPICAL HEATWAVE

Britain bakes with a tropical heatwave and the weather once again affects British high street sales. However, sales of John Lewis fans and air conditioners rise by 120% before selling out. And paddling pools and inflatables go up 77%.



# WHAT WE LOVED IN 2018

## THE SUSTAINABLE WATER BOTTLE

+37%

Eco-friendly, sleek and beautifully designed, the S'well bottle was a must-have buy. Water bottles overall were up 37% and the number of brands we stock are up 85%.



## COLOUR OF THE YEAR

+401%

Generation Z Yellow lifted our spirits and was seen everywhere, from Amal Clooney at the Royal Wedding to the Duchess of Cambridge at Wimbledon. Sales of yellow dresses were up 401%.



## EMBLEM OF THE YEAR

+38%

Whether it was celebrating diversity or making a fashion statement, the rainbow was a popular trend this year and an instant mood booster. The Rachel Ellen rainbow range was up 38%.



## THE LEOPARD PRINT DRESS

Leopard print roared its way into our wardrobes - seen on everything from boots to scarves to dresses. This Somerset leopard print dress was a best-seller.

THIS SOMERSET LEOPARD PRINT DRESS WAS A BEST-SELLER.



## THE ROBOTIC LAWNMOWER

+75%

Our gardens got the tech treatment with robotic lawn mowers proving popular, up 75%.



## THE WHITE TRAINER

+53%

As we opt for comfort and style, trainers account for 15% of our shoe assortment. Men's white trainer sales were up 53%.



## THE THONG

+72%

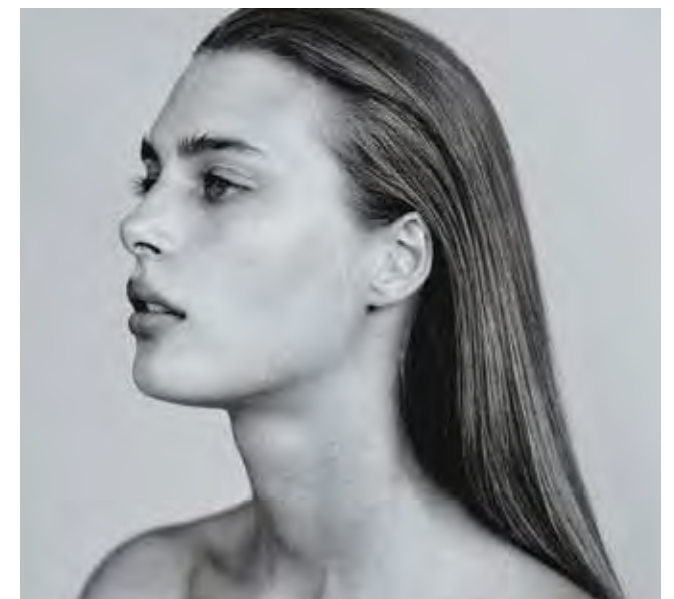
After years of steady decline, the thong is back, with sales up 72%.



## THE VEGAN BEAUTY PRODUCT

+467%

Veganism spilled across from food to beauty this year. One vegan rosehip oil product was up 467%.





# WHAT WE LEFT BEHIND IN 2018

## THE SMALL TELEVISION

- 34%

It was all about big screens this year as TVs and phone screens were supersized. In the first half of 2017, sub 31-inch screens were down 34% compared to the same period in 2018. Meanwhile, plus 70-inch screens were up 97%.



## THE ALARM CLOCK

- 30%

As people opt to use their smartphones, sales of alarm clocks were down 16%, and we have reduced our alarm clock range by 30%.



## THE DESKTOP COMPUTER

- 15%

As consumers shop on the go using their smartphone, we saw a decrease in sales of desktop computers, down 15%.



## THE DVD PLAYER

- 40%

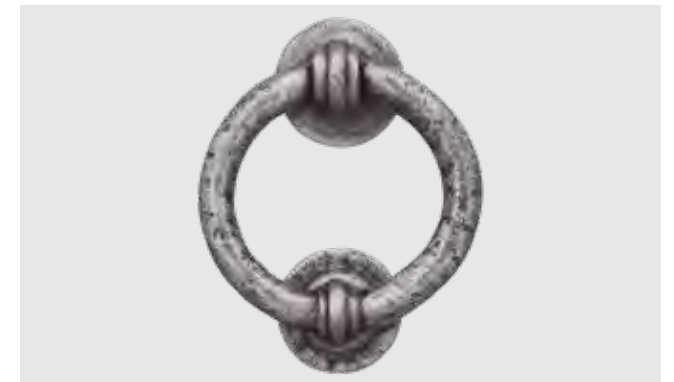
With the rise in popularity of online streaming services, the DVD player has become old technology.



## THE DOOR KNOCKER

- 9%

Traditional door knockers are down 9% as people invest in tech-advanced smart doorbells, up 367% since we started selling them in July 2017.



## THE TROUSER PRESS

- 36%

They may have been cutting edge in the Sixties but trouser presses are no longer the must-have item they once were.



- 15%

## THE COLD SHOULDER DRESS

This item was given the cold shoulder by shoppers as they opted for shirt dresses.





# EVENTS

# THAT

# SHAPED

# THE YEAR

This year was one of the toughest retailers have seen and consumer confidence was markedly low. Major events like the World Cup, the Royal Wedding and the extreme weather affected shopping patterns. But there were a few products that definitely saw a major boost.

In a year where we aimed to establish our individual identities, we saw in Meghan Markle a royal bride like none other. She instantly captured the nation's attention and her relaxed, unique sense of style was universally admired.

## THE ROYAL WEDDING

### +327%

#### MULBERRY DARLEY BAG

After Meghan stepped out with the Mulberry Darley bag, we saw sales of the handbag rise 327%.

### +33%

Wedding and bridal jewellery was up by 30% over the Royal Wedding build up and occasion wear hats went up 33%.



#### BEAUTY PRODUCTS BY SARAH CHAPMAN

Beauty products by Meghan's facialist, Sarah Chapman, have seen an uplift of 57% since the Royal Wedding, with the Overnight Facial product up 99% YOY.

#### PARTY LIKE ROYALTY

But it wasn't just Meghan's style that captured the eye of British shoppers.

The UK's mood was lifted by their Windsor wedding in May, with sales of our 'Party Like Royalty' Partyware range up 114% in the week of the Royal Wedding.

#### THE YELLOW DRESS

Around the time she was pictured wearing a bright yellow dress at a Commonwealth reception, online searches for 'yellow' shot up and we saw a 401% increase in sales of yellow dresses.



# THE WORLD CUP

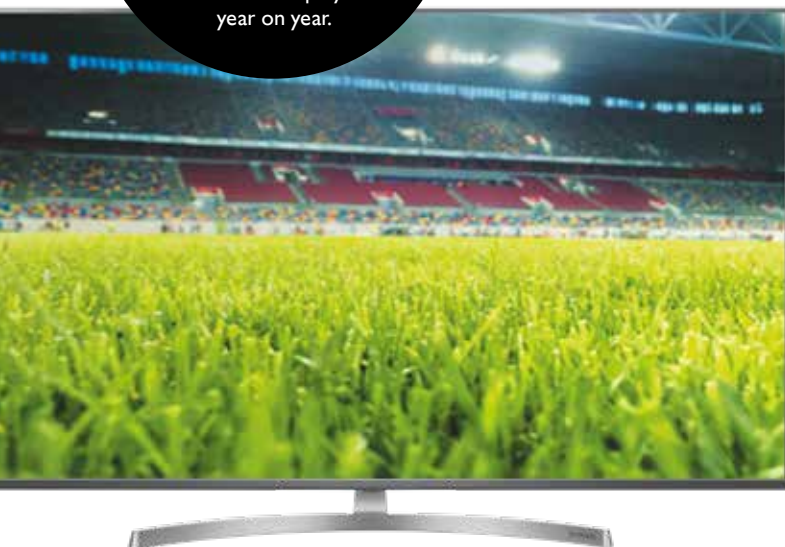
It didn't come home in the end but the England team put in a performance to be proud of. And what better way to watch England in the World Cup than on a new supersize TV.

Here we track week-on-week sales of televisions, relating them to the highs and lows of England's World Cup campaign.

+249%

60-INCH SETS

Sales of 60-inch sets were up a remarkable 249% and 80-inch models up by 200% year on year.



## SALES OF TELEVISIONS THROUGHOUT THE WORLD CUP

Two weeks until the World Cup and we already see sales start to ramp up.

### ENGLAND V TUNISIA

1st game - 18th June

Our biggest week for sales, up 46% on last year as England get off to a good start against Tunisia.

+46%

### ENGLAND V PANAMA

2nd game - 24th June

TV sales go up 19% the day after we win 6 - 1 to Panama.

+19%

### ENGLAND V BELGIUM

3rd game - 28th June

The day after we lose 1-0 to Belgium, TV sales go up 11%.

+11%

### ENGLAND V COLOMBIA

Last 16 - 3rd July

A close shave with Colombia knocked our confidence and this was reflected in sales, down 7%.

-7%

### ENGLAND V SWEDEN

Quarter-final game - 7th July

The day before the quarter-finals and fans want the best TV to watch England on, sales up 33%.

The day after our quarter-final win and TV sales are up again, 29% in anticipation of the Semis.

+33%

### ENGLAND V CROATIA

Semi-final game - 11th July

The day before the big match, only the best screen will do with sales up 23%. But it was not to be and England sadly loses out to a place in the final, with a 2-1 defeat.

+23%



+20%

HATS, COATS AND GLOVES

Up 20% in March compared to the previous year.

## COLD WEATHER

### WINTER BOOTS

Up 63% in February & March.

### DUVETS

Up 11% in March.

### UGG SCUFFETTE SLIPPER

Up 50%.

### CASHMERE

Cashmere accessories up 15% and jumpers up 14%.

Unpredictable, infuriating and sometimes downright bizarre - the British weather will always be a topic for conversation. The extreme temperatures caused national disruption and impacted the retail sector, as shoppers battled blizzards and baking hot temperatures. But there were some products customers just couldn't do without. The savage chill from the Beast from the East increased demand for hats, gloves and scarves.

Then, just when the nation thought that it would never thaw out, the heat wave hit and we saw an early surge in sales of summer items like paddling pools, trampolines and outdoor games.

+316%

### INFLATABLES

Up 316% compared to the previous year.



# THE WEATHER

## HOT WEATHER

### TRAMPOLINES

Trampolines and other playsets up by 142%.

### FANS

Air conditioning units up 120%.

### SANDALS

Flip flop sales up 30%.

### MEN'S LINEN DINNER JACKET

Up 86% compared to the previous year.







# HOW WE SHOPPED

This was the year mobile really took off, with shoppers browsing and purchasing on the move instead of waiting to get home to use a desktop. Customers also became more savvy about refining their searches and using filters effectively to narrow down options so they could find the perfect product. And for those seeking expert advice or the chance to unwind and relax, shops became destinations for great experiences customers could share with friends on social media.



#WEAREPARTNERS





# TEN THINGS WE DID IN OUR SHOPS

1

## THE EXPERIENCE DESK

These anchor points for our best brand ambassadors to welcome and connect customers with our range of events and services have proved so popular we have rolled them out more widely.



2

## FAMOUS FACES

Some of the famous faces we have teamed up with for our events include Joe Wicks, Ben Fogle, Eudon Choi and Prue Leith.

3

## SUMMER OF SOUND

With footfall up 23%, our Oxford Street rooftop proved more popular than ever. Customers enjoyed DJs and live bands and we also teamed up with Samsung to create an outdoor cinema experience.



4

## FASHION

We gave fashion talks in our Style Studios including a talk by former Vogue Fashion Director Lucinda Chambers who also trained some of our personal stylists.



5

## MASTERCLASSES

Fever-Tree mini masterclasses at their Ultimate G&T bar proved so popular they sold out in 72 hours.



6

## PRIDE

Pride was prouder than ever with flags on our store windows, a specially branded johnlewis.com and a Pride takeover of our Instagram account.



7

## WELLNESS

We hosted early morning yoga sessions and HIIT boxing classes, as well as Neom scent workshops.

8

## THEATRE TRAINING

In 2017, we introduced a new type of training by the National Theatre at our Oxford shop, teaching Partners voice and body language skills.

9

## SLEEP

We ran workshops on how to get the best night's sleep and The Lying Down Club offered customers "the world's most beautiful dormitory" in our Oxford Street shop.

10

## DISCOVERY ROOM

Customers can access the expertise and knowledge of our Partners and suppliers through events and workshops, in the Discovery Room in our shops.



# SHARING EXPERIENCES THROUGH SOCIAL MEDIA



## 'POOLSIDE' EVENT

An "immersive Instagrammable moment" with inflatables and live music in two of our shops attracted 35,000 customers and generated over 400,000 dedicated Instagram posts.

Our Sunnyside inflatables made up 68% of the total sales at our Poolside event.

We sold out of inflatable peacocks the week after David Beckham posted an Instagram snap of himself on one.

One customer loved the products at Poolside so much he spent £1,000 on inflatables to take to his villa in the Mediterranean. Another customer bought two Tiki Bars (£575 each) to have them shipped abroad.

Most popular item: Flamingo Drinks Holder.

## 35,000

CUSTOMERS VISITED  
THE POOLSIDE EVENT

## 400,000

DEDICATED INSTAGRAM POSTS



## 21,000

VISITS VIA  
SOCIAL MEDIA

After we launched the Becca beauty range, half of the 21,000 visits to the Royal Glow Highlighter product on our website were via social media.



## 80,000

WISHLIST  
SHARES

We know customers love to compile wishlists of products on our digital platforms so now customers are able to share these wishlists via our app. We have seen over 80,000 shares to date with nursery products the most popular category for wishlist sharing.

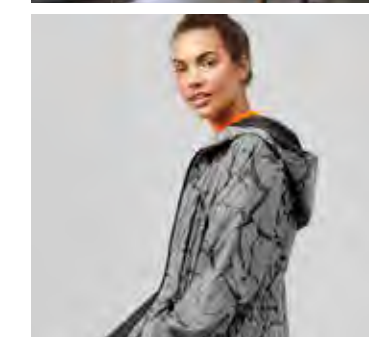
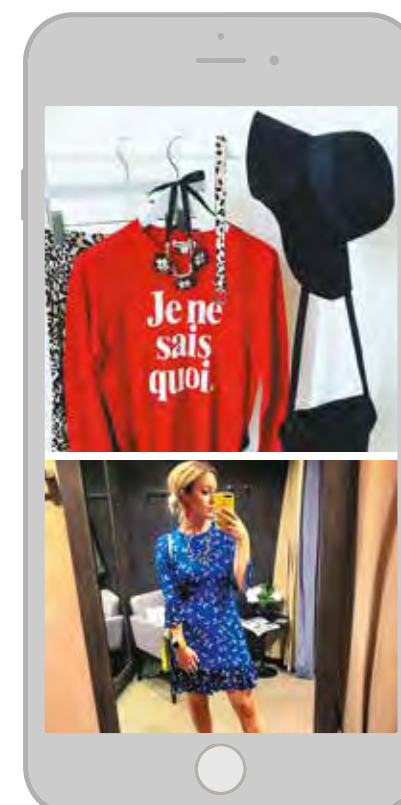
## #WEAREPARTNERS

Our hashtag #WeArePartners really took off this year, giving Partners an authentic, personal voice on social media and an opportunity to share their expertise and curate great content for customers.

By September 2018, 329 Partners across all 50 shops had been trained and over 3,273 pieces of content shared, with 99.4k engagement and a reach of 22.3 million.

# 22.3

MILLION REACH





This was the year of shopping on the move as mobile overtook desktop and tablet as the most convenient way for people to browse and shop. Shoppers still like to make bigger, more considered purchases via desktop but it is clear that mobile is catching up in this area, with 21% of sales made on the move, up 16% from this time last year.

Customers are also being much more specific in regard to what they are looking for on our sites, using less generic terms and more filters to narrow down exactly what they are after. The average number of words in a search term has gone up by 7% over the last year to 3.2 words. And one in three customers will refine their search by using a filter, up by 7% in the last year, with mobile seeing the biggest increase of filter usage, up 10% on last year.

# SMARTPHONE SHOPPING OVERTAKES OTHER CHANNELS FOR THE FIRST TIME



## APPS BECAME IN-STORE SHOPPING COMPANIONS

Our app is also proving a popular way to shop with visits up 45% from last year and the number of orders placed up 56%. And while the app is a great tool for online shopping, we saw that increasingly it's also being used as an in-store shopping companion.

About 12% of all visits to the app involve using a feature that's designed to be used in a shop, for example Kitchen Drawer, which creates a digital copy of all paper receipts.

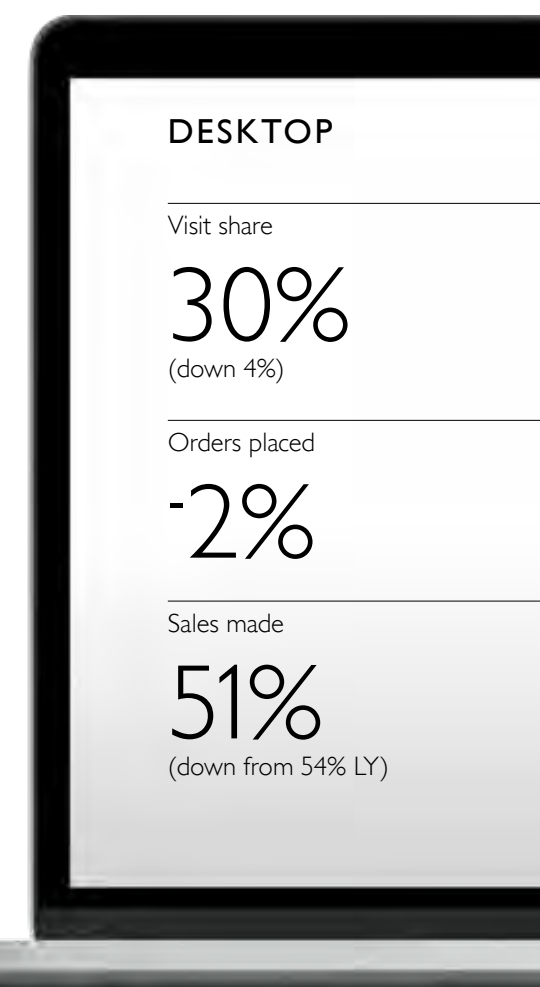
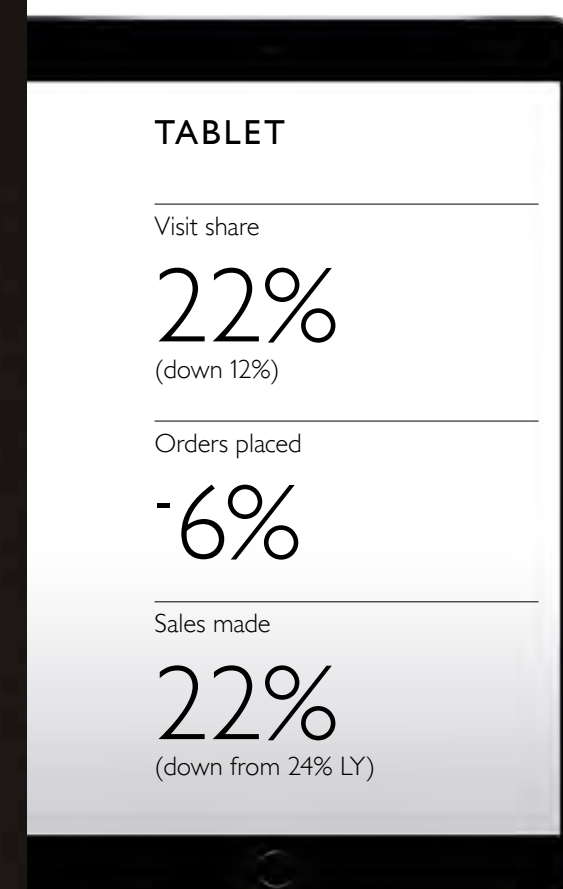
The app also has a bar code scanner which customers can use to look up further information about products in shops, like alternative colours and sizes or ratings and reviews.

80% of app users shop in our shops, which is why we're also rolling out a feature that will allow customers to check stock in our stores. This is currently available for 20% of products but the plan is to increase this to all suitable products soon.

The app has a scannable, digital version of the myJohnLewis card which is useful for the 82% of app users who are also myJohnLewis members, saving them from needing to carry the card with them.

myJohnLewis customers also have access to their reward vouchers in the app, and are 25% more likely to redeem their free tea and cake than customers who use paper!

Browsing time on the app has also increased by 20 seconds per visit while the average order placed on the app has gone up by £7.



## THE TOP

# 5

## SOCIAL MEDIA SMASH HITS

The top 5 John Lewis products we clicked through to from social media

- 1 Edinburgh Gin Advent Calendar
- 2 Nest Hello Video Doorbell
- 3 Lenovo IdeaPad 1205 81A500B0UK Laptop
- 4 littleBits Star Wars Droid Inventor Kit
- 5 Joseph Joseph Bamboo Wood Index Chopping Board Set



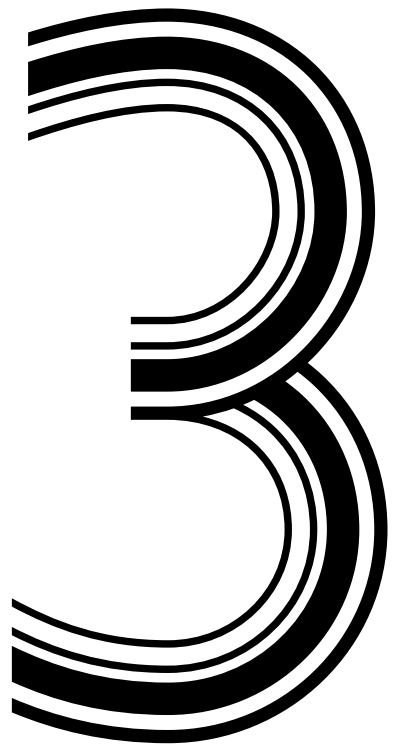


# HOW WE LIVED

Shoppers became more conscious about what they bought and where those products came from, taking responsibility upon themselves to protect the planet. Driven in part by the issues raised in the BBC's Blue Planet II series, the sustainability element of what consumers choose to buy, and how they decide to live, is more important than ever.

There was also a greater focus on sleep as an essential element of a healthy lifestyle, alongside diet and exercise. An increased knowledge and awareness has seen a rise in sales of products that aim to improve the quality of our shut-eye.

And in our homes, the desire to express our individual identities means that customers are choosing pieces that say something about who they are. Understated, pared back interiors are being dominated instead by rich fabrics, bold colours and striking designs.





# BUYING BETTER— SUSTAINABILITY GOES MAINSTREAM

This was the year we took it upon ourselves to build a more sustainable future rather than leaving it to others. We know that 73% of millennials will spend more with companies who create positive change. And our research tells us that customers want more detail about where the products they buy come from.

Add to this change a desire for a less materialistic lifestyle and shoppers have become more careful and mindful when they buy, thinking about what impact a purchase has on the planet and what it says about them as individuals. We've seen that people are keen to buy better, investing in a piece because of its quality and longevity.

## 120

RECYCLED BOTTLES  
TO PRODUCE ONE  
10.5 TOG DOUBLE  
DUVET

In August we introduced a cleverly designed duvet that is made from 100% recycled polyester produced from plastic bottles - it takes approximately 120 bottles to produce one 10.5 tog double duvet. The duvet is produced in an eco factory that runs on renewable energy.



As part of our commitment to using sustainably produced materials within the John Lewis Croft Collection, the glassware is all made from recycled glass.



## 55,000

Last year, John Lewis collected for reuse over 27,000 electrical products, around 2,000 used sofas and recycled materials from 55,000 mattresses.

## +71%

REUSABLE CUPS

Four months after Blue Planet II finished, sales of reusable coffee cups, travel cups and flasks were up 71%.

CRAFTSMANSHIP SINCE 1953

Our own brand cushions are manufactured by our Partners at the John Lewis owned mill in Lancashire, Herbert Parkinson. Our Partners have also produced our filled bedding, blinds and curtains at the mill since 1953.

SUSTAINABLE FOOD STORAGE

We have seen strong sales in sustainable alternatives to tin foil and cling film with brands like Stasher and Bees Wrap driving the overall food storage category up 15%.

REUSED OR RECYCLED SOFAS

We work with the Re-use Network on our not-for-profit sofa reuse scheme. When you buy a new sofa from our shops you can arrange to have your old one collected at the same time. We will then make sure it's reused or recycled in conjunction with local charities to support disadvantaged communities.



THE PARTNERS  
BEHIND THE STORY



"John Lewis & Partners has a better way of doing business, with a set of values that empower us all to take responsibility for how we act as a company, and as Partners. That's why we are able to put sustainability at the heart of everything we do."

MARTYN WHITE

Partner and Senior Sustainability Manager



# INVESTING IN SLEEP— THE NEW WELLNESS TREND

Rest has become our greatest luxury and, in the world of sleep, business is booming. It is estimated 20,000 working days a year are lost to absenteeism caused by a lack of sleep in the UK. We've seen customers taking sleep more seriously, investing in high quality mattresses, bed frames and other accessories that improve the quality of their slumber.

Shoppers are also increasingly turning to tech to get the perfect night's sleep, buying sleep-inducing lights, smart watches and even sleep trackers which go under the mattress to provide data about the patterns and quality of our shut eye. Sales of sleep sprays, creams and aromatherapy candles are also up.

## PREMIUM BED LINEN

Our premium bed linen saw an 11% uplift over the year.

## SILK PILLOWCASES

Sales of silk pillowcases were up 13%.

## SLEEPWEAR

Sales of Sleepwear went up 7%.

+42%

## BEST-SELLING PILLOWS

Our Devon wool pillows were up 42% while duck down in duvets proves most popular, up 14%.



**NEOM ORGANICS** +264%

Neom Organics sleep products are up 264%.

**HUNGARIAN GOOSE TOPPER** +292%

Customers looking for a luxurious mattress topper snapped up our Hungarian goose topper, with sales up 292%.

**JOHN LEWIS ULTIMATE COLLECTION MATTRESS** £16,500

Customers that want to splash out can spend £16,500 on the John Lewis Ultimate Collection Cashmere Pocket Spring Zip Link Mattress. We have sold 6 in the past year.

**GRACE BEDSTEAD** +1288%

Our upholstered Grace bedstead is a bestseller, up 1288%.



**WROUGHT IRON AND BRASS BED CO. BED FRAME**

Our most expensive bed frame is the Wrought Iron and Brass Bed Co. George Sprung Bed Frame (£3,664).



## THE POWER OF NAPPING

In November we launched the Lying Down Club. Inspired by the end of a yoga session, the Lying Down Club was powered by The Midult and tucked up on the 3rd floor of our Oxford Street store. Customers could find the best of tech, home and beauty to help them re-set, along with massages, noise cancelling headphones and pyjamas.





# EYE-CATCHING INTERIORS

The desire to be different and to create homes which say something about who we are means customers moved away from the more pared back look and instead chose pieces that were unusual and eye-catching.

Customers are now considering the Instagram potential of their home and are looking to curate their own collections, putting an individual stamp on interiors by buying stand-out pieces that catch the eye.

Dark, moody hues in everything from wood to fabrics are juxtaposed with bright, vibrant colours as shoppers become more daring with their interior design. Continuing the quirky, cluttered look, animal prints such as toucans, monkeys and cheetahs have been a big design motif with customers looking for objet d'art that make a bold statement.

## THEMED WALLPAPER

Sales of the John Lewis Ipanema toucan themed wallpaper were up 55% in the first two weeks of August.

## AUDREY CHAIR

Occasion chair sales were up 18%. The Orange Velvet Audrey Chair was a bestseller, up 64%.

## ARRAY CABINET

Shoppers loved embossed and engraved furniture as they sought out eclectic and unique pieces - our Array Cabinet sold three times faster than expected.



## THE PARTNERS BEHIND THE STORY



"Helping customers create spaces unique to them inspires us all. Ranges like our Albero Tiger's Eye wallpaper from our Palazzo Collection have offered my team a chance to show off their flamboyant side - something I think is true for our customers too."

## PHILIPPA PRINSLOO

Partner and Design Manager for Home





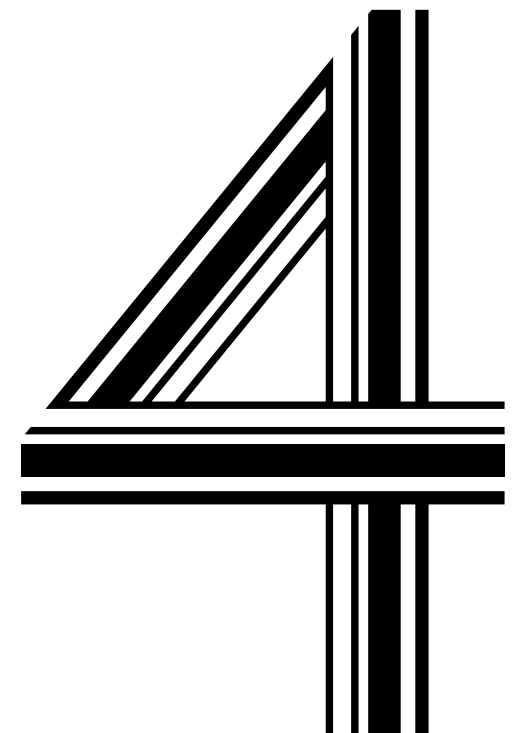


# HOW WE LOOKED

A more self-confident and individual approach to style saw customers opting for bold colours. They've torn up the traditional fashion rule book and gone out of their way to create their own look from a wider selection of clothes and accessories.

Rather than carefully matching colours, women are increasingly playing with them – blending some and contrasting others. Men are also embracing crayon box colours as never before, specifically in their underwear and swimwear choices. Whether it's the influence of Love Island or the bolder look of women's fashion, women's underwear has become racier with the arrival of brands such as Bluebella.

As customers took a more thoughtful, considered view of fashion and shopping and made the decision to invest in better quality pieces, we saw an increased interest in personal styling, with men becoming more enthusiastic about this service.





# CLOTHING GETS COLOURFUL

A lift in the nation's spirits and the warm weather spurred shoppers to go big and bold with colour this year.

Yellow, orange and coral were all popular with customers. And as Pantone's colour of the year, purple was another big hit. But it was Generation Z Yellow that really topped the charts as the new colour of the season, while the muted shade of Millennial Pink was trumped by a new, richer and more vibrant bubble-gum colour. Even the perennially safe and popular blue morphed into a deep cobalt hue.

John Lewis & Partners Womenswear was designed to help create a look that truly celebrates individuality. There are a myriad of ways the 300-piece range can be styled - where colour and tone are tools of expression and an accessible route into finding and exploring personal style. And representing the full colour wheel of John Lewis & Partners Womenswear, accessories act as the finishing touch to the collection.

## THE PARTNERS BEHIND THE STORY

A design team of 12 Partners, including colour forecasters and designers, with over 50 years experience in the Partnership between them worked on this new collection.

HAWAIIAN  
SHIRTS SOLD  
OUT IN  
**8**  
WEEKS

## HOW WE WORE COLOUR

### TONAL

Different shades and variations from the same overall group, for example, cobalt and navy blue.

### COMPLEMENTARY

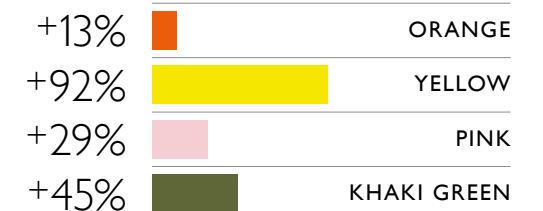
Colours that contrast to make one look brighter, for example yellow and purple.

### CLASHING

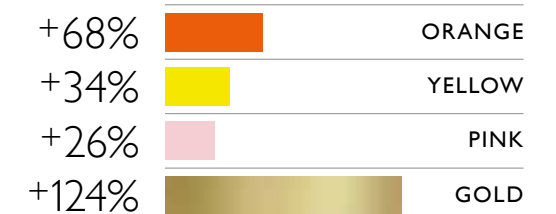
Colours that traditionally have not been thought to work together, such as red and pink.

## THE COLOURS WE WORE

### MENSWEAR



### WOMENSWEAR



### WOMENSWEAR ACCESSORIES

Sales of our yellow gold and purple stone rings are +200%

### WOMEN'S SHOES

Red shoe sales +36%  
Yellow shoe sales +37%





# THE NEW STYLE PHILOSOPHY

The drive for individual identity and a unique look saw women searching for an element of versatility in what they wore. Jumpsuits are on the rise, with “jumpsuit” overtaking “dress” as an online search term and sales of jumpsuits up 61% year on year. Athleisure also got smarter as female shoppers paired the trainer with business dress.

Customers also took their time when buying things, purchasing more mindfully and thinking about the environmental impact.

John Lewis & Partners Womenswear, our largest own-label to date, has been designed to reflect this new style philosophy which embraces women's individuality and aims to put style before fast fashion.

+61%

JUMPSUITS

Sales up 61%



## THE PARTNERS BEHIND THE STORY



“The new collection is about more than clothes. It’s about a new style philosophy that embraces women's individuality and the way they dress, using colour and silhouette to create new building blocks for your wardrobe.”

**JO BENNETT**

Partner and Head of Buying, Womenswear



## INNOVATION

### FASHION BUY-BACK TRIAL

This year John Lewis piloted an innovative service in which customers can have any unwanted clothing bought from its shops and website, collected from their home and be paid immediately for each item, regardless of its condition.



# THE LOVE ISLAND EFFECT

The latest season of Love Island was as popular as ever and for seven weeks the nation tuned in to watch the Islanders in their quest for love. The show once again spurred a drive in sales of inflatables and water bottles. But this year, skimpy underwear was also on the up, while men decided to buy bright-coloured undies.

## BLUEBELLA RANGE +250%

Sales of the BlueBella range, a brand which collaborated with last year's Love Island winner Amber Davies, were up 250% ahead of Valentine's Day.

## MEN'S SWIMMING SHORTS +33%

Colourful recycled swimming shorts were up 33%.

## THE THONG +72%

The thong is back! After years of steady decline, sales were up 72%.

## SUSPENDERS +132%

Suspenders were up 132%.

## MEN'S COLOURFUL BOXER SHORTS +10%

Men's colourful boxers were up 10%.

# STYLING GETS PERSONAL

Shoppers are more empowered than ever before and with this new drive for individuality and self-expression, we have seen personal styling appointments grow as a tool for customers to get exactly what they want. Our personal styling service represents what we stand for in fashion and we are already seeing how it can transform the way we sell and how our customers shop.

Customers who use one of our personal styling services spend on average 30% more in the year after their appointment than customers who have not used the service.

Personal styling in our new White City shop has already been so successful that the six stylists in this branch currently drive a fifth of the total womenswear trade across the store.



+97%

Of all the customers who attend styling appointments, 97% go on to buy something.



## WE OFFER FIVE TYPES OF APPOINTMENTS

Holiday Wear

Wardrobe Refresh

Special Occasion

Work Wardrobe

The Perfect Pair of Jeans

We now have men's personal styling in 12 shops.

The average appointment value is £100 more than women's personal styling, showing that men are willing to spend money on getting the right look.

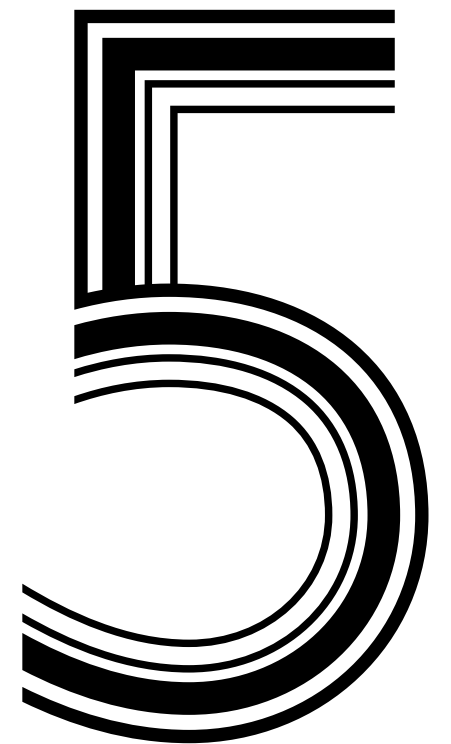




# BEAUTY

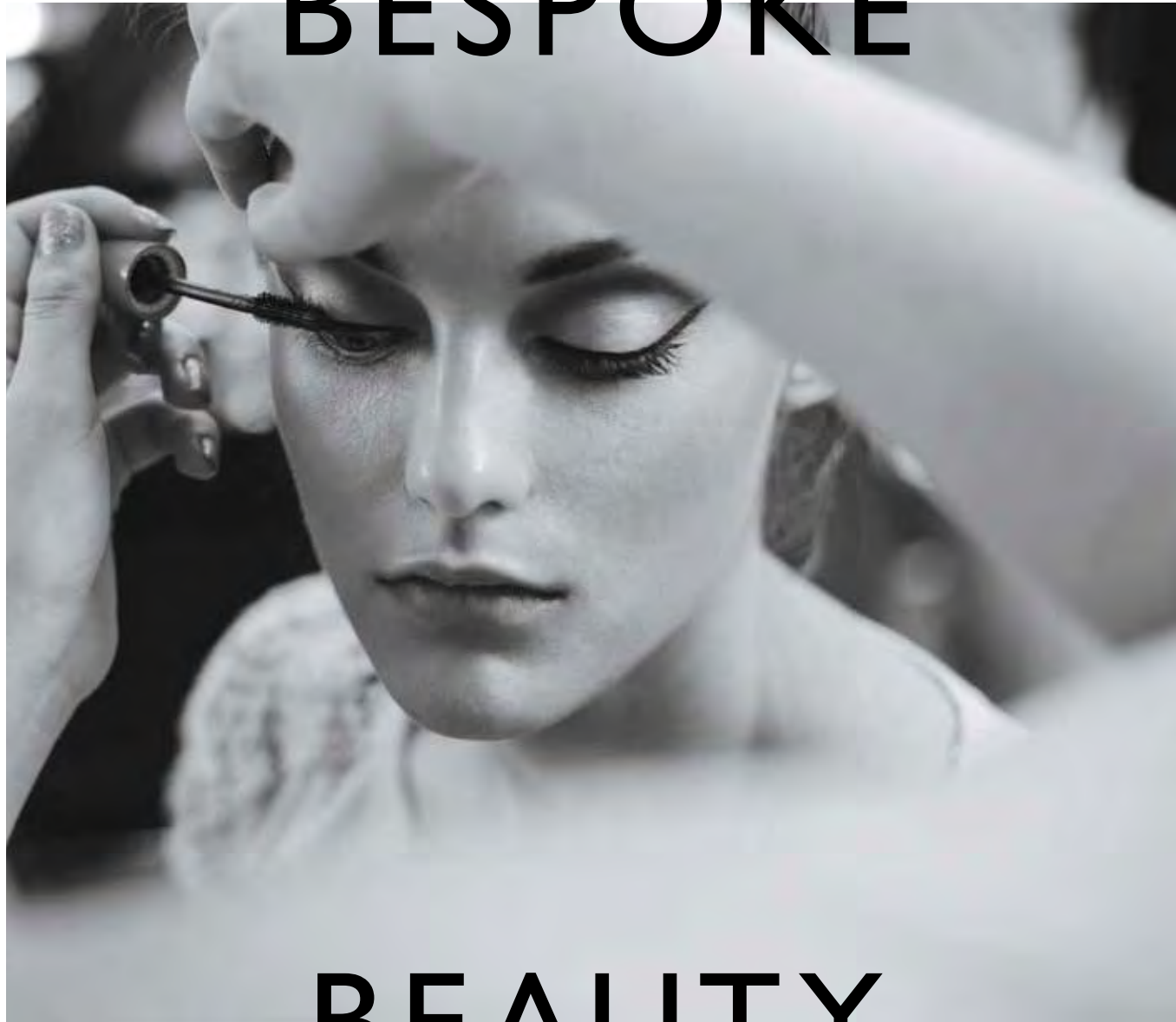
This year, beauty is all about tailor-made products. Out is the 'one-size-fits-all' approach and in are custom beauty experiences, designed to help shoppers find the best products for them. Customers are no longer seeking to mirror a universal look. And Instagram is providing beauty fans with an incentive to experiment, explore and celebrate their individuality.

In response, we have launched some exciting new beauty initiatives, designed to help shoppers find products perfectly suited to them.





# BESPOKE



# BEAUTY

Our new Beauty Studio opened in our Leeds and Cambridge shops in October. This concierge-style service puts Partners at the heart of our Beauty offer, who provide independent advice to help our customers shop across our full range of brands and products. The Beauty Studio Partners offer a suite of services including consultations, such as how to get the perfect smokey eye, bookable appointments and a programme of group tutorials to help customers perfect their beauty techniques.

## £3.5m INVESTMENT

The concept is part of a £3.5m investment in our beauty and fragrance halls which will support the introduction of new, specialist beauty brands as well as the extension of some of our customers' favourites to more shops.



## THE PARTNERS BEHIND THE STORY



"The Beauty Studio is a concierge-style service that will place Partners at the heart of our Beauty offer. These passionate Beauty Guides will offer independent advice across the brands we sell as well as services and support to help customers find beauty products to suit their needs."

### MATT LEESER

Partner and Head of Buying, Beauty, Wellbeing and Leisure

## MYJOHNLEWIS REWARD PROGRAMME

For those 600,000 myJohnLewis customers who shop Beauty, we will use customer insight to understand their beauty preferences and reward them with a personalised set of benefits. We will be gathering customer feedback on the rewards and inspiration, so that we can launch a unique market-wide personalised Beauty reward programme.

# BIG BEAUTY TRENDS

## ACID TEST

Acids are this year's miracle ingredient, with hyaluronic acid products seeing a 94% increase in sales and glycolic acid up 275%. Ren's new Glow Tonic was the bestseller by far and is our most popular acid product.



## JUST GLOW NOW

Shoppers still want a convincing tan but thanks to Love Island they don't want to wait for it. Sales of the Elemis Tan Accelerator rose by 51%. We also saw sales increases in Vita Liberata Body Blur Instant HD creams while the show was on air. We've introduced more shades in this range and sales have risen by 43% with the additional lines. The Light version saw a 16% increase in sales.



## VEGAN BEAUTY

Veganism has spilled across from food to beauty products with vegan beauty growing by 12% at John Lewis compared to 5% for the total beauty market. The full Pai range is Vegan and sales are up 310%. Their hero product is rosehip oil, with sales up 467%.





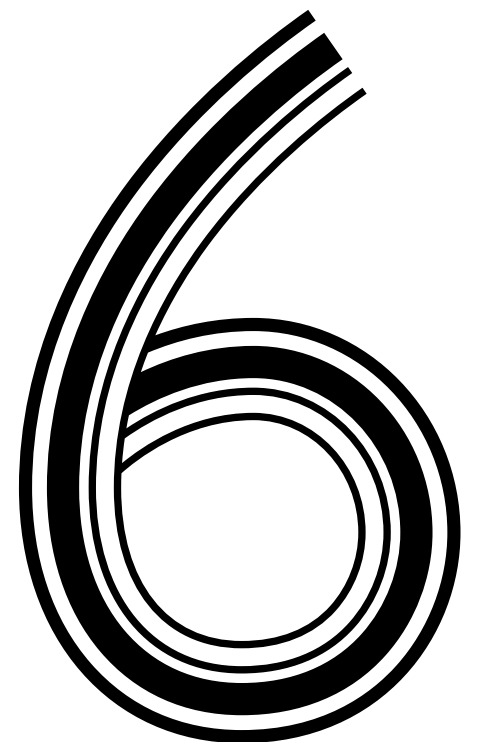


# THE FUTURE



**JOHN VARY**  
Partner and Futurologist

Retail is ever changing and it's difficult to predict what might happen next year, let alone in twenty or fifty years' time. Here, John Vary, the Partnership's Futurologist takes a look at the trends which might one day play a part in how we shop.





# FAREWELL SMARTPHONE, HELLO TRANS — HUMANISM

## SMART CONTACT LENSES

It might have transformed the way we live but the days of the physical smartphone may be numbered. Instead, technology will increasingly become part of us. Transhumanism will see us wearing smart contact lenses that provide information about what is around us from shop displays to weather forecasts. Wondering what that sofa would look like in your living room? Your smart lenses will show you. How about that jumper? You'll be able to see it in a myriad of colours as you virtually "wear" it, matched with anything from your wardrobe.

## VOICE SEARCHING WILL BECOME THE NORM

Already johnlewis.com is seeing a growth in people searching for products by voice rather than typing it. Our team of engineers are already looking at how customers using voice search will find the item they want, however they describe it and whatever language they use. According to research firm Gartner, by the year 2020 around 30% of web searches will be done without a screen.

## EMOTIONALLY CHARGED

The idea of retail therapy could be taken to the next level as technology could monitor heart rates and emotional reactions to products. This information could then be fed back to the shopper so they can be sure they are making the right purchase.

## THE CAR PARK REIMAGINED

As driverless cars become the norm, the need for car parks at retail outlets and shopping centres will become irrelevant. Instead, these spaces could be repurposed for 3D printing and manufacturing. Houses and even city farms could also replace parking spaces.

## A CLOSER RELATIONSHIP BETWEEN SHOP AND CUSTOMER

Truly personalised service could see customers share their DNA with shops so that retailers could tailor products specifically to a customer's heritage or ancestry. Meanwhile, smart technology in the home will act as your very own personal shopper, alerting shops in advance when you are running low on something or looking for a gift or special product.



## ANKI VECTOR THE GOOD ROBOT

Targeted at consumers fearful of a world filled with mechanised destroyers, the 'good robot' will give weather updates, take photos, play games and answer questions.

## GOOGLE HOME MAX SMART SPEAKER

You can ask it questions, tell it to do things and with Google Assistant built-in, you can control compatible smart home devices with your voice and do things like turn up the thermostat, turn lights on and off or check to see if the front door is locked.

## OCULUS GO HEADSET

This standalone virtual reality headset and controller has everything you need to enter other worlds. With no PC or wires attached, just adjust the straps and immerse yourself in 360 degree experiences and more.



IF YOU WANT THE LATEST IN  
CUTTING-EDGE TECHNOLOGY, WHY  
NOT TRY ONE OF THESE PRODUCTS?

## APPLE WATCH SERIES 4

If this smart watch detects a significant, hard fall while you're wearing it, it taps you on the wrist, sounds an alarm and displays an alert. You can choose to contact emergency services or dismiss the alert.



## SIEMENS SMART OVEN

This Siemens oven offers 15 different cooking modes and has dozens of automated cooking programmes, a self cleaning function and delivers fast, convenient cooking through combining different methods with preset programming.

## SAMSUNG SMART FRIDGE

Forgotten to write a shopping list? This fridge has internal cameras and a range of apps to help you check what's in your fridge when you're out and about. There are also systems to help you keep track of your groceries' expiry dates, as well as monitor and re-order your food shopping.





The majority of statistics within this report come from John Lewis & Partners' database between the time period of August 2017 to September 2018. Further information can be provided by the John Lewis press office on request.



WANT TO KNOW MORE?

CONTACT:

JOHN LEWIS & PARTNERS  
COMMUNICATIONS

171 Victoria Street  
London  
SW1E 5NN

Email: [pressoffice@johnlewis.co.uk](mailto:pressoffice@johnlewis.co.uk)

Phone: 020 7592 6994

