

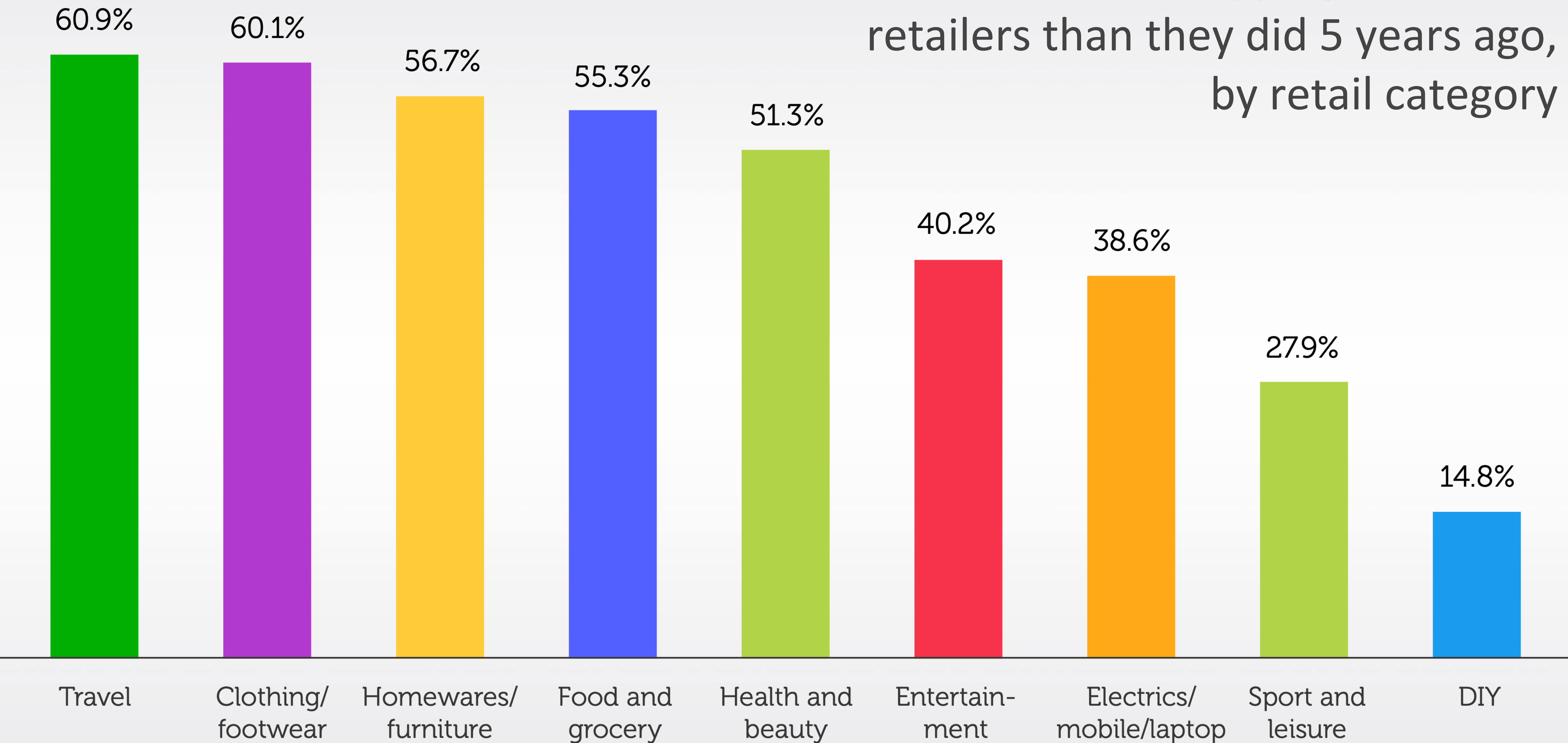
Beyond saturation: Why retail isn't just a race to the bottom

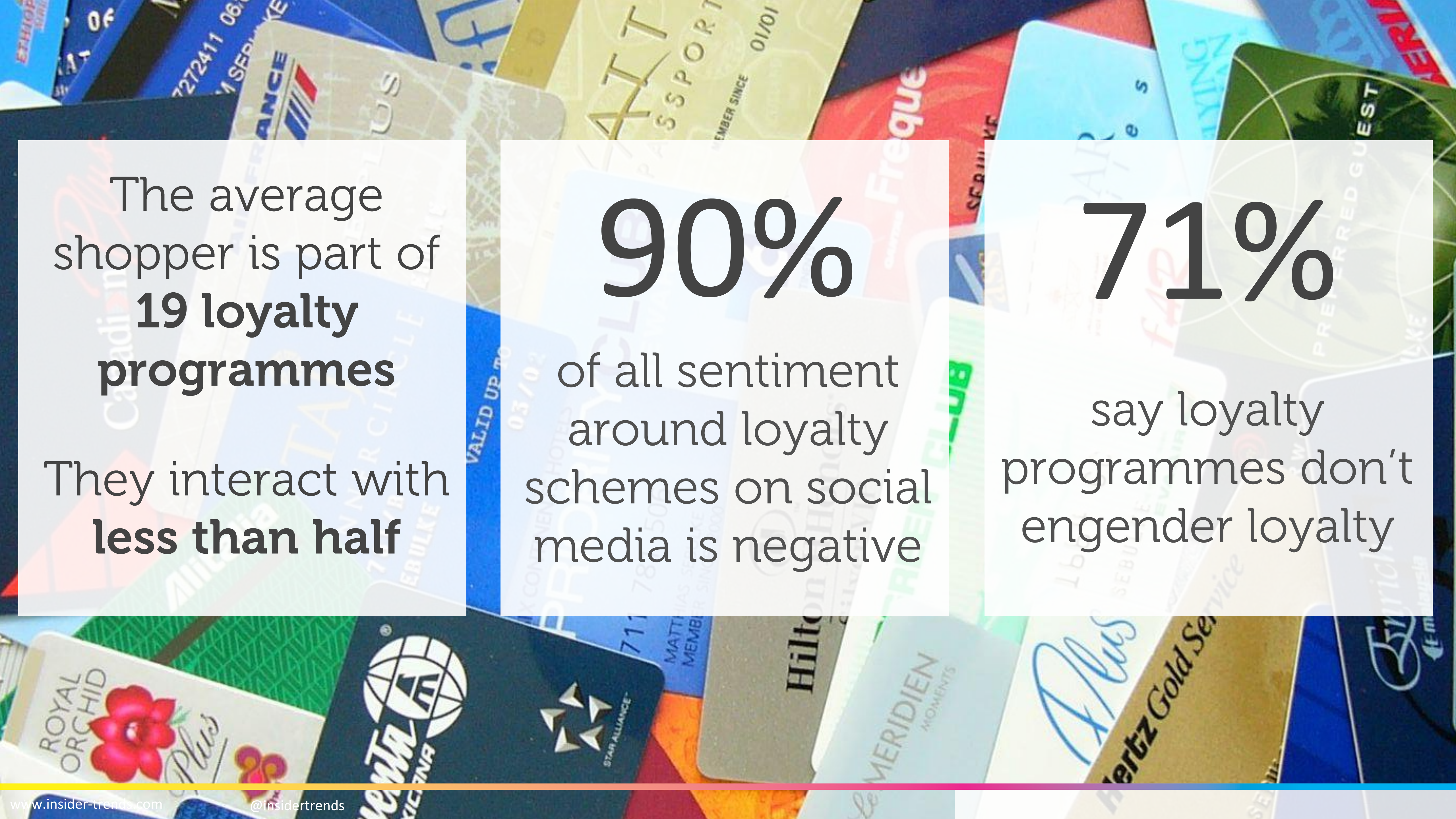
Jack Stratten
Head of Trends



Consumer + market trends: Saturation

% of customers shopping with more
retailers than they did 5 years ago,
by retail category





The average
shopper is part of
**19 loyalty
programmes**

They interact with
less than half

90%

of all sentiment
around loyalty
schemes on social
media is negative

71%

say loyalty
programmes don't
engender loyalty

The average customer interacts with a brand across 20 different channels



Depop, Cadbury, Dolce & Gabbana, Chuu, Heinz, Detox Market, Coca-Cola, Gentle Monster, Kaws, Philipp Plein, HSBC, Louis Vuitton, Gucci, Stylenanda, Mini, Commes de Garçons, Minor Figures, Kellogg's

Launch the brand you've
always dreamt of.

Start For Free

Pietra



ILY Baby
by Hailey Sani





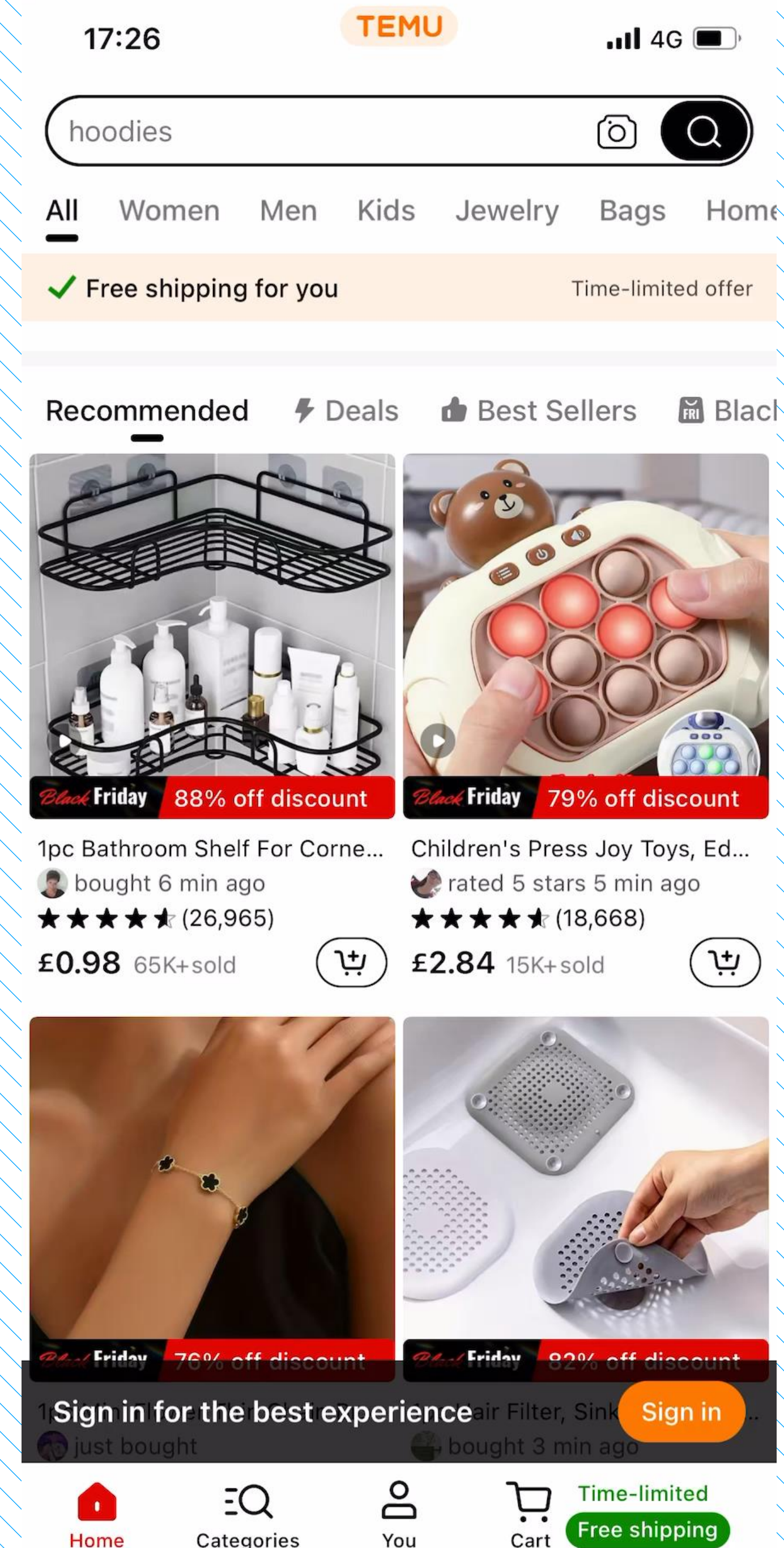
Shein releases
between 2000 and
10,000 new styles
every day - 30x
more than any
competitor

13 million sellers on its marketplace, 100 million active users

\$6 billion revenue in its first year, 30-50% cheaper than Amazon on like-for-like products

Delivery time between 6 and 20 days

Temu, global



TECH

Amazon plans to launch discount store in bid to fend off Temu and Shein

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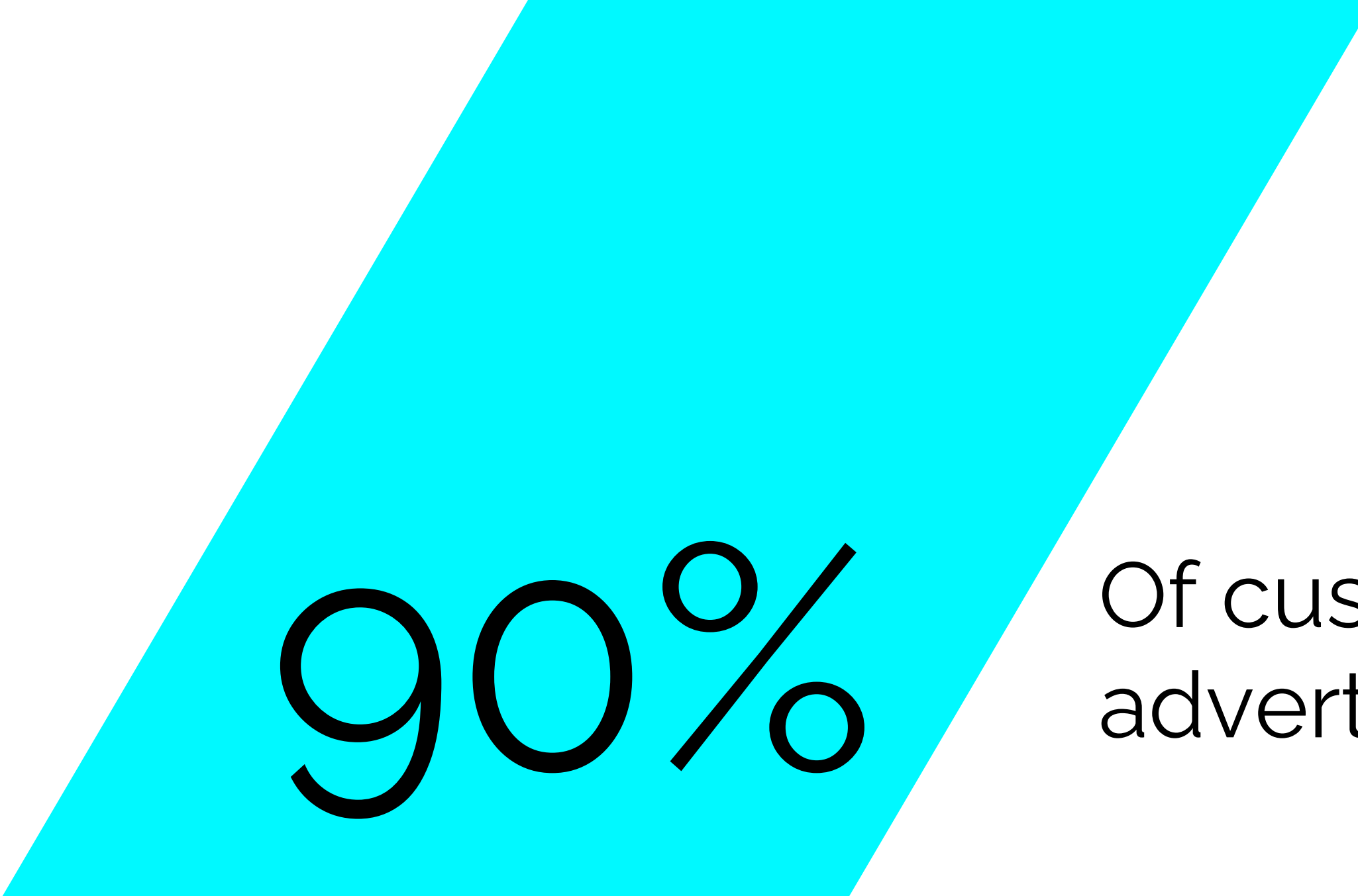
Annie Palmer
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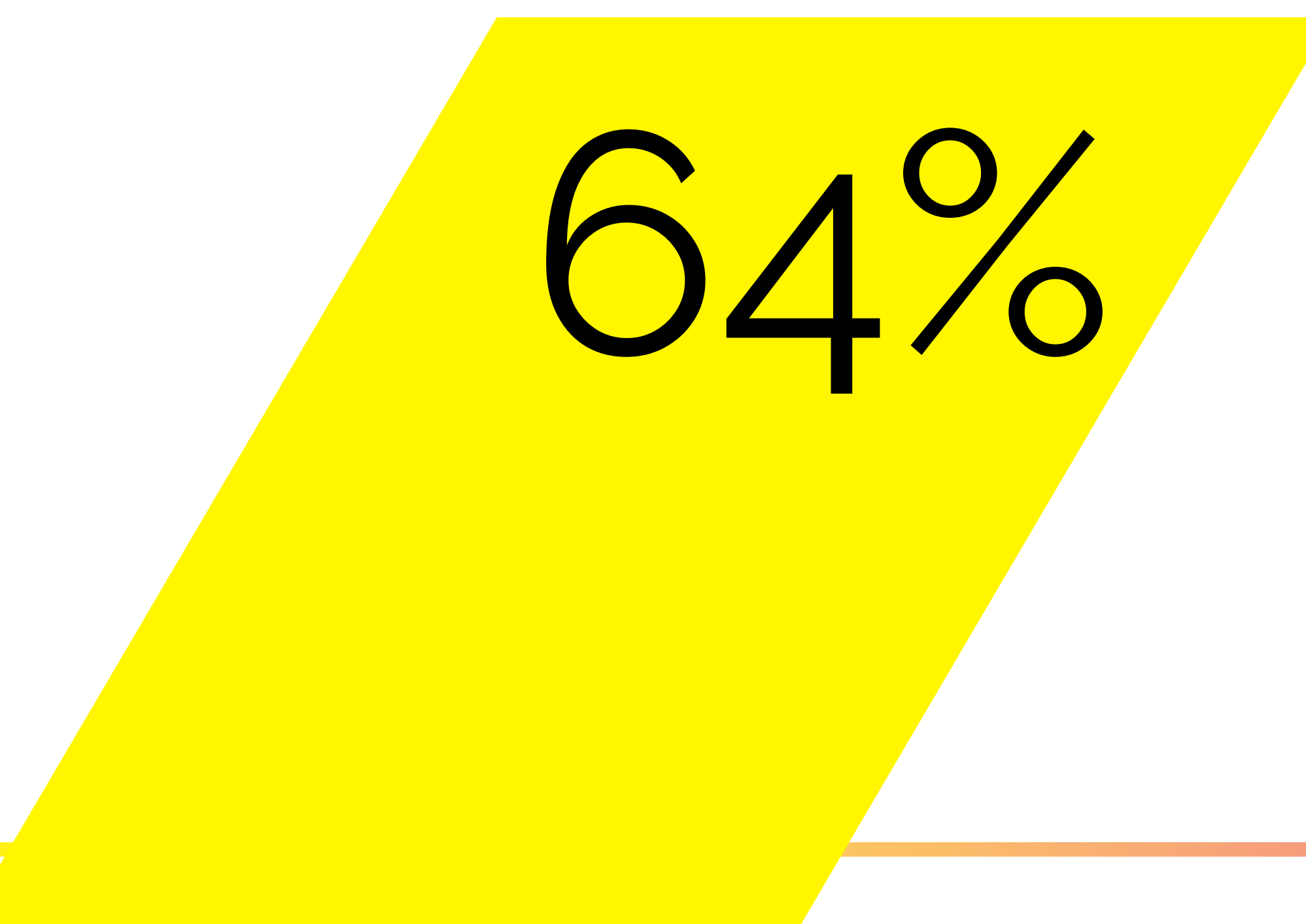
KEY POINTS

- Amazon hosted a closed-door event for sellers in China, where it presented plans for a new budget storefront that features low-cost apparel, home goods and other items.



90%

Of customers feel they see too much retail advertising



64%

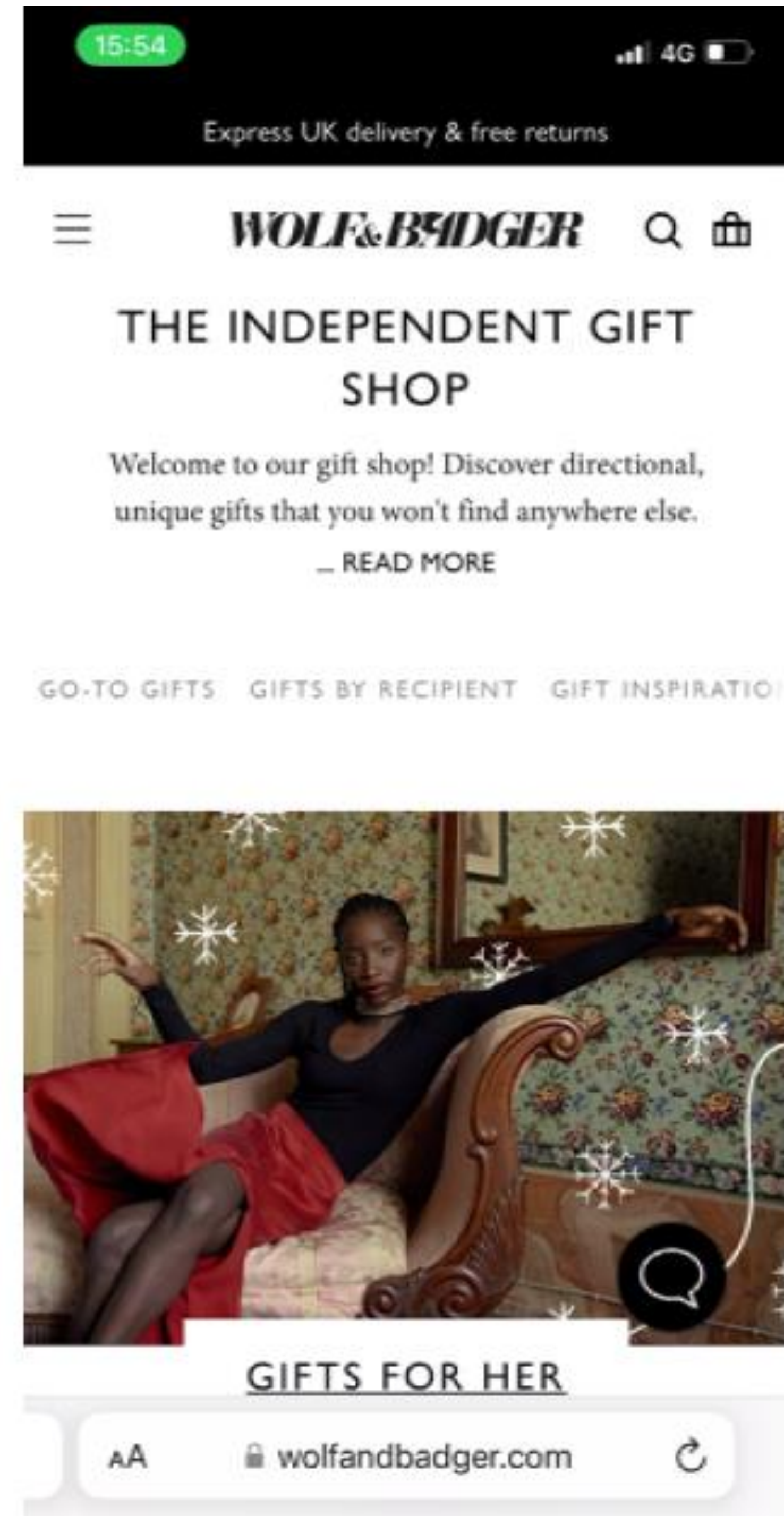
Of customers feel overwhelmed by choice



Curation

Wolf & Badger

"We can't and don't want to compete on range, so have doubled down on curation. And as we've reduced the number of products online, our revenue and profit has grown. The less product we showcase, the better everything sells"



Ffern

Current Season:

WINTER 24

Next Release:

67D 16H 51M 44S

Waiting List:

OPEN

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MOBILE NUMBER...



REGION: USA



Ffern X Katy Papineau #

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Currently full.

- 01 Join our waiting list
- 02 We'll text you if a space on the ledger becomes available
- 03 Take up the space and we'll send you our latest perfume
- 04 Thereafter, we'll blend you a bottle of perfume for each season, delivered on the solstice / equinox

NB: Each bottle is \$129, and includes a sample vial and free returns.

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Ffern, UK



Pop up Grocer, NYC

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Kama Ayurveda, London

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the perfect Moses basket to
the most suitable car seat.

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Baby's next steps

Enjoy practical help and
guidance as your baby
reaches each new milestone.



John Lewis, UK



Founded in 2017, £56 million annual sales



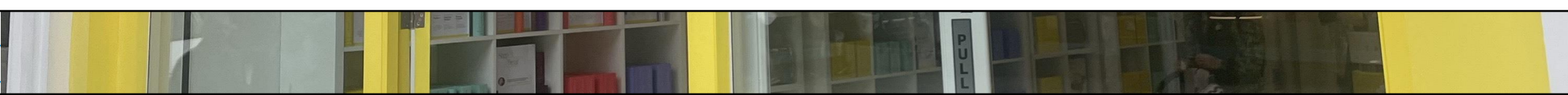
Older consumers over younger



Service and story over selling



Curation over choice



Polarised pricing

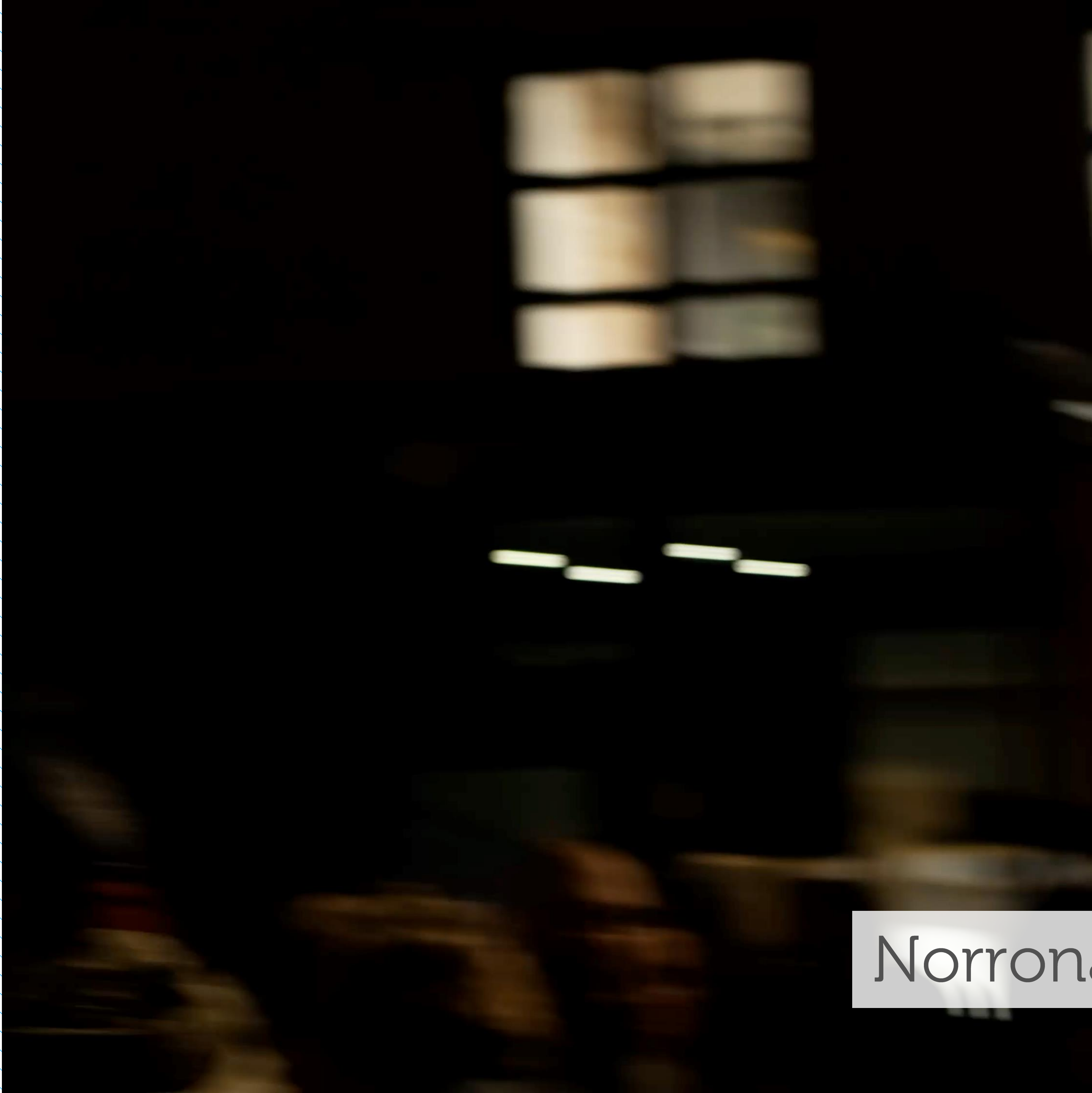


Trinny London



LYKO

Lyko, Stockholm



Norrøna House, Oslo

Final thoughts: The only way is up



Primark, Missguided Dubai, Deciem, Chuu Seoul



Five Below, New York



Uniqlo, Madrid + Paris

Thank you!

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