



# CLOSING THE GAP

The OC&C Retail Proposition Index 2014

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## THE OC&C PROPOSITION INDEX 2014

This is the fifth year we have carried out the International OC&C Proposition Index, a major piece of consumer research measuring shopper attitudes and perceptions towards the world's leading retailers. Consumers were asked to rate the retailers they had shopped on the strength of their overall proposition, and then to score the key elements of that proposition (Price, Range, Service, etc). These results are then used to compile a ranking of consumers' favourite retailers from across the globe.

The fifth OC&C Proposition Index is the largest ever compiled. Turkey has been added for the first time, which has meant that 235,000 ratings have been analysed from over 32,000 consumers on 800 retailers in 10 countries. This means that over the last five years we have interviewed over 100,000 consumers who have given us over a million ratings of individual retailers. This combination of breadth and depth gives a powerful view into the relative strength of retail propositions across the world and how this has been changing over time.



### Setting the Bar

Amazon has once again retained its crown as the leader of the OC&C Proposition Index, a crown they have held in every year that the index has been compiled. Amazon's success has been built on exceptional delivery across all elements of their proposition which is shown by their position in the top 5 global retailers across seven of the key elements.

Amazon is still setting the bar in global retail, but despite its dominance at the top of our rankings there are signs that its position may not be infallible. Amazon have lost four of their global proposition element titles to multichannel retailers over the past two years. In 2013 the highest rating for Service was awarded to Polish Jeweller Apart and the award for best in Look and Feel was taken by John Lewis (both have now been replaced by UK cosmetic retailer Lush). This year has seen Amazon lose their Value for Money crown to the discounter Aldi and the accolade for Trust has now gone to DM of Germany.

Universal Trust continues to be a challenge for Amazon. 2013 saw Trust ratings decline

across all markets, most significantly in Germany and the UK related to local PR challenges. Those declines continued in 2014 in the UK, France and the Netherlands, with only a modest recovery in Germany.

French consumers' ratings of Amazon have in fact declined across most metrics, possibly related to the longstanding policy debate between Amazon and the French parliament regarding free delivery and discounting levels, which has culminated in a ban on free shipping of books. Amazon responded by offering shipping for 1 cent on all book orders.

Amazon's most significant decline in Trust this year has come in the Netherlands, where ratings for Service are also well down on previous years. This potentially highlights the challenges that Amazon's continued absence from the Dutch market (the company launched an ebook and Kindle store at the end of 2014 but continues to rely on international sites in other categories) represents to serving Dutch consumers.

The area in which Amazon remains unmatched is Choice, where it holds a material lead over the competition thanks to the breadth and relevance of its product offer. Reinforced by its Marketplace proposition this remains a material advantage for Amazon who hold a lead over even eBay despite the latter holding a larger absolute range of products.

#### Amazon Rankings by Proposition

	Amazon Highest Rank Achieved Globally		2014 Winner
	2014	2013	
Wide Choice of Products	1	1	Amazon
Products That Are Suited to Me	1	1	Amazon
Value for Money	3	1	Aldi
Service	4	2	Lush
Store Look & Feel	4	4	Lush
Trust	5	1	DM
Quality of Products	16	20	M&S Simply Food
Low Prices	23	17	Primark

#### Changes in Amazon's National Rank, 2013-14

	Low Prices	Quality of Products	Wide Choice of Products	Products That Are Suited to Me	Service	Website Look & Feel	Value For Money	Trust	Overall
US	↑3	-1	-	-	↓-5	-	-1	+1	-
UK	-1	-	-	-	-1	↓-3	-1	↓-3	-
France	↓-6	↓-6	-	-	↓-5	↓-8	-	-2	-1
Germany	+2	+1	-	-	+1	-1	-	↑3	-
Netherlands	+2	↑3	+2	-	↓-18	-	↑4	↓-24	+2

## Leading The Chase

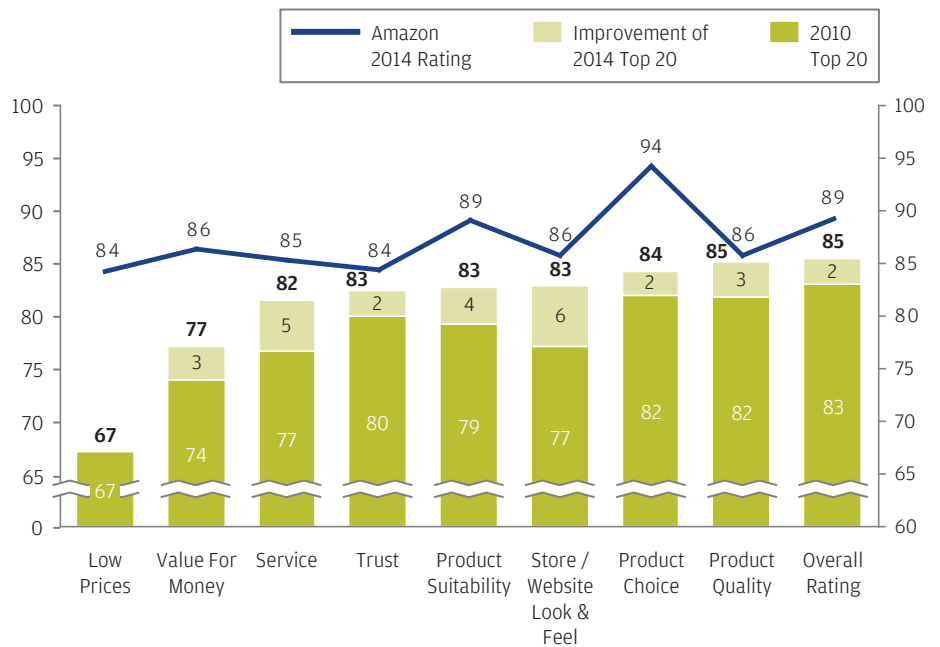
Due to Amazon's longstanding dominance in the OC&C Proposition Index their ratings have served as a benchmark for the rest of the retail industry to pursue. The competition has responded to this challenge and over the past five years the top 20 retailers have significantly closed the gap on Amazon across every element of the proposition. In 2010 the gap between Amazon and the rest was wide, with Amazon averaging a 10 point lead over the top 20 across all elements of the proposition. Today the gap has almost halved, with Amazon averaging only a 6 point lead over the average of the top 20 retailers. This is particularly evident in areas such as Service, Store Look and Feel and Product Quality where the top 20 have closed the gap significantly and almost caught the Amazon benchmark.

Retailers such as Lush, Publix, Sephora and, famously, Apple have raised the bar in terms of in-store experience and responded to the challenges posed by the threat of the online channel by taking physical Store Look and Feel to new heights. At the same time the likes of John Lewis, Trader Joes and Waitrose (as well as Lush, Publix and Apple again) have redefined the human touch with increased levels of Service to combat the ease of shopping online by highlighting the benefits of visiting a store.

It is not just the multichannel players that are raising their game; Website Look and Feel can have a similar impact for online pureplays. Both Allegro (Poland) and Flipkart (India) started out with similar website layouts to Amazon, but underwent full redesigns in 2014 which has helped

them gain more than 35 places each in our rankings. Amazon has retained their famous website layout for many years, however they were testing new layouts throughout 2014, perhaps as a response to changing consumer preferences.

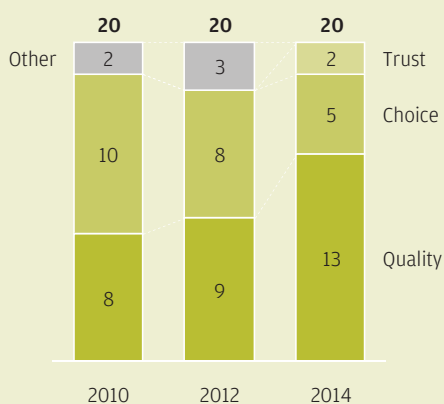
Change in the Rankings of the Top 20 Retailers, 2010-14



## Focus on Quality

Looking at the Top 20 retailers in the OC&C Proposition Index it is clear that consumers put a strong weight on quality and choice. In 2014 18 of the top 20 retailers have one of these as their leading proposition element. Although this was also the case in 2010, the mix has changed. Now 13 of the top 20 are strongest in quality, whereas in 2010 it was only 8.

# Top 20 Retailers by Strongest Area, 2010 vs 2014



## OC&C PROPOSITION INDEX - TOP 20 RETAILERS

Rank	Company	Category	Country				Strongest Area	Weakest Area	Score	Chg
			US	UK	FR	DE				
1	Amazon	Gen Merch	US	UK	FR <td>DE <td>Wide Choice</td> <td>Low Prices</td> <td>89.3</td> <td>-0.7</td> </td>	DE <td>Wide Choice</td> <td>Low Prices</td> <td>89.3</td> <td>-0.7</td>	Wide Choice	Low Prices	89.3	-0.7
2	DM	Health & Beauty		DE			Quality	Service	88.5	2.3
3	Picard	Grocery		FR			Quality	Low Prices	87.9	1.8
4	Yves Rocher	Health & Beauty		FR			Trust	Low Prices	86.7	0.9
5	Publix	Grocery	US				Quality	Low Prices	86.2	2.4
6	Costco	Club	US				Quality	Service	85.9	0.7
7	John Lewis	Department Stores		UK			Quality	Low Prices	85.7	1.1
8	Flipkart.com	Gen Merch		IN			Trust	Low Prices	85.4	4.2
9	Allegro	Gen Merch		PL			Wide Choice	Quality	85.2	2.9
10	Trader Joes	Grocery	US				Quality	Low Prices	85.0	0.1
11	Bol.com	Entertainment		NL			Wide Choice	Low Prices	84.7	1.0
12	Apple	Electricals	US	UK	FR		Quality	Low Prices	84.6	0.6
13	Thiriet	Food Service & QSR		FR			Quality	Low Prices	84.6	1.8
14	Netshoes	Sports & Outdoors		BR			Quality	Low Prices	84.4	2.1
15	Bath and Body Works	Health & Beauty	US				Quality	Low Prices	84.2	0.6
16	Barnes & Noble	Entertainment	US				Wide Choice	Low Prices	84.1	3.0
17	Lush	Health & Beauty		UK			Quality	Low Prices	84.1	-
18	Nordstrom	Department Stores	US				Quality	Low Prices	84.0	3.6
19	Vente-privée	Clothing & Footwear		FR			Quality	Service	84.0	0.3
20	iTunes	Entertainment	US	FR			Wide Choice	Low Prices	83.9	-0.2

# CONSUMER PROPOSITION CHAMPIONS

## LOW PRICES



Rank	Retailer	Shopper Rating
1	Primark	94.0
2	Action	91.4
3	Dollar Tree	91.0
4	99p Store	90.2
5	Poundland	89.2
6	Aldi	88.8
7	Home Bargains	88.6
8	Zeeman	88.2
9	Kik	88.0
10	Farm Foods	87.8

## VALUE FOR MONEY



Rank	Retailer	Shopper Rating
1	Aldi	86.3
2	Amazon	85.7
3	Home Bargains	84.6
4	DM	84.3
5	Farm Foods	83.9
6	Kiko	83.1
7	Yves Rocher	83.1
8	99p Store	82.7
9	Lidl	82.4
10	Costco	82.2

## TRUST



Rank	Retailer	Shopper Rating
1	DM	86.0
2	Yves Rocher	85.5
3	John Lewis	85.4
4	Amazon	84.4
5	Picard	84.2
6	L.L.Bean	84.1
7	Netshoes	83.8
8	Amazon	83.8
9	Costco	83.7
10	Lush	83.6

## SERVICE



Rank	Retailer	Shopper Rating
1	Lush	86.9
2	John Lewis	86.4
3	Trader Joes	85.2
4	Amazon	85.1
5	Publix	85.1
6	Waitrose	85.0
7	Apple Store	84.0
8	Bath and Body Works	84.0
9	Nordstrom	83.5
10	Yves Rocher	83.3

## PRODUCT QUALITY



Rank	Retailer	Shopper Rating
1	M&S Simply Food	89.3
2	Apple	89.0
3	DM	88.0
4	Nordstrom	87.6
5	John Lewis	87.5
6	Waitrose	87.4
7	Lush	87.3
8	Douglas	87.3
9	Picard	87.2
10	Publix	86.8

## WIDE CHOICE OF PRODUCTS



Rank	Retailer	Shopper Rating
1	Amazon	94.3
2	Ebay	92.5
3	Allegro	90.9
4	Kaufland	90.1
5	Bol.com	89.2
6	Taobao	89.2
7	Globus	88.7
8	T-Mall	87.7
9	DM	87.6
10	Douglas	87.5

## STORE / WEBSITE LOOK AND FEEL



Rank	Retailer	Shopper Rating
1	Lush	86.5
2	Publix	86.3
3	Sephora	86.3
4	Amazon	85.7
5	Bath and Body	85.5
6	Crate and Barrel	85.2
7	Nordstrom	85.1
8	Douglas	84.7
9	Apple	84.6
10	DM	84.5

## FASHIONABILITY



Rank	Retailer	Shopper Rating
1	Victoria's Secret	85.5
2	Asos	84.4
3	Zara	84.0
4	Schuh	84.0
5	H&M	83.5
6	Soliver	83.0
7	Zalando	83.0
8	Arezzo	82.6
9	Forever21	82.2
10	Boohoo.com	82.2

## Emerging Marketplaces

Amazon is a truly global retailer that has made its products available in over 200 countries and has physical operations present in more than 20 countries around the world. As a result they are one of only 4 retailers that have been shopped by consumers across 7 or more countries covered by this Index and are placed in the top 2 in four of these markets. The other three similarly global retailers are Zara, H&M and C&A.

Amazon's leading positions in the US, UK, France and Germany are materially founded on their first mover advantage in the online

channel in those markets. In markets where Amazon don't hold a position amongst the top 2 in our Proposition Index it is interesting to observe that they are also not the highest ranked online pureplay. Each of Flipkart in India, Bol.com in the Netherlands, T-Mall in China, Allegro in Poland and Netshoes in Brazil appear to have beaten Amazon to scale in their markets and now hold the #1 ranking overall in those markets. Further international expansion remains a huge growth opportunity for Amazon, however these emerging leaders could represent a significant challenge to Amazon, particularly in some of the largest emerging markets.

### Amazon National Rank by Country

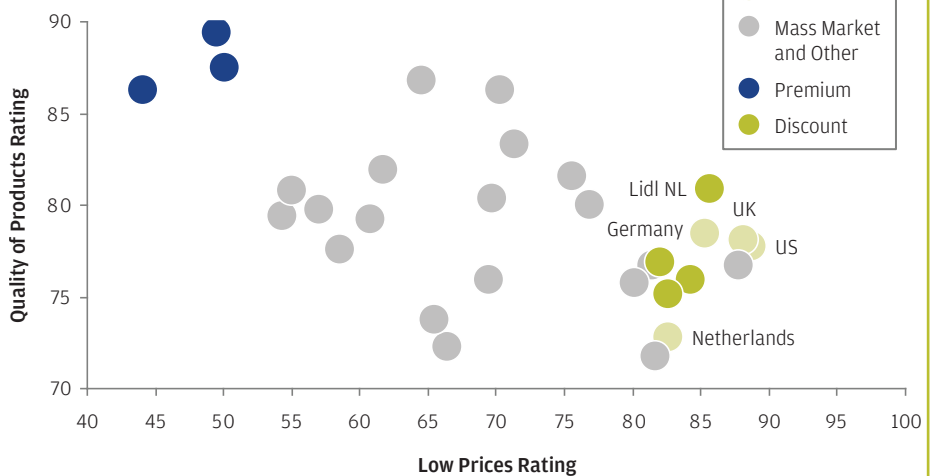
Country	Amazon National Rank 2014	Leading Online Pureplay (Rank)
US	1	Amazon (1)
UK	1	Amazon (1)
Germany	2	Amazon (2)
France	2	Amazon (2)
India	5	<b>Flipkart (1)</b>
Netherlands	7	<b>Bol.com (1)</b>
China	16	<b>T-Mall (1)</b>
Poland	38	<b>Allegro (1)</b>
Brazil	–	<b>Netshoes (1)</b>

## Quality Discounters

Aldi and Lidl, the German-based grocery discounters, are amongst the retailers who have climbed the most in the OC&C Proposition Index in 2014, rising by more than 60 places.

Although their core propositions are still focused on value, both retailers have improved quality to a level which is now largely in line with the mass market grocers. This comes following significant investment in marketing by both retailers, which has focused on improving the overall consumer quality perception.

Grocer Performance on Quality and Price



## OC&C PROPOSITION INDEX - TOP 5 RETAILERS

Rank	Retailer
1	Netshoes
2	Saraiva
3	Submarino
4	Hering
5	Americanas

Rank	Retailer
1	T-Mall
2	IKEA
3	JD
4	Walmart
5	Taobao

Rank	Retailer
1	Picard
2	Amazon
3	Yves Rocher
4	Thiriet
5	Vente-privée

Rank	Retailer
1	DM
2	Amazon
3	Breuninger
4	Rossmann
5	Douglas

Rank	Retailer
1	Flipkart.com
2	Jockey
3	Amazon
4	Reebok
5	Puma

Rank	Retailer
1	Bol.com
2	IKEA
3	Bijenkorf
4	Douglas
5	Albert Heijn

Rank	Retailer
1	Allegro
2	Rossmann
3	IKEA
4	Empik
5	Apartment

Rank	Retailer
1	D&R
2	Mavi Jeans
3	Hepsiburada
4	Zara
5	Özdilek

Rank	Retailer
1	Amazon
2	John Lewis
3	Apple
4	Lush
5	M&S Simply Food

Rank	Retailer
1	Amazon
2	Publix
3	Costco
4	Trader Joes
5	Bath and Body Works

# CATEGORY PROPOSITION CHAMPIONS

## GROCERY



## APPAREL



## ELECTRICALS



## DEPARTMENT STORES



## GENERAL MERCHANDISER



## HEALTH & BEAUTY



## ENTERTAINMENT



## DIY



## HOUSEHOLD



## FURNITURE



## Online Pureplay Volatility

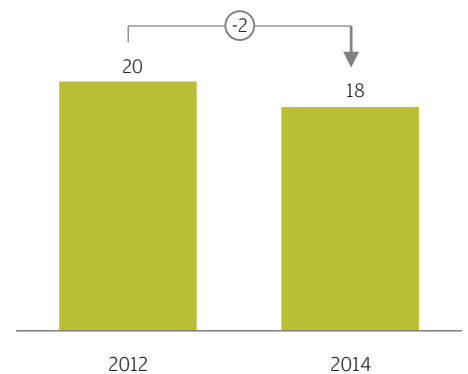
Sustaining success as an online only player is a significant challenge. Four of the Top 5 2013 online pureplays have slipped down the rankings - some falling by more than 60 places over the last year.

Despite the global shift towards online retail over recent years the number of pureplays within the Top 100 Retailers has actually declined. This is both further evidence of multichannel retailers upping their game, but also reflects a fundamental challenge facing online pureplays: the benefits of scale are huge. When comparing the top online pureplays with the top multichannel offerings we see that multichannel retailers outperform pureplays on most proposition elements, only losing out materially on choice and price. In a world where range and price are the primary differentiators it is natural that scale players build positions of advantage that make it difficult for others to compete. This is what Amazon have done and makes it very hard for other pureplays in the same markets to survive.

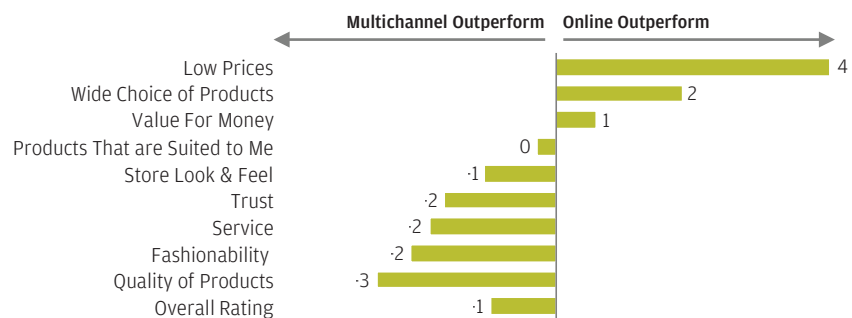
Change in Ranking of Online Pureplays, 2013-14

Overall Rank 2013	Retailer	Overall Rank 2014	Rank Change 2013-14
1	Amazon	1	0
9	newegg	72	-63
15	Vente-privée	19	-4
19	Leboncoin	93	-74
30	Ebay	52	-22
33	iTunes	20	13
39	Bol.com	11	28
43	Flipkart.com	8	35
45	Allegro	9	36

# Online Pureplays within the Top 100 Retailers



Top 10 Online PurePlays vs Top 10 Multichannel Retailers



## Multichannel Collectors

Unsurprisingly a strong multichannel offer grows more and more important for bricks and mortar retailers, with more multichannel shoppers observed in the 2014 Index than any previous year. On average across the most multichannel retailers multichannel customers (customers who have visited a retailer in more than one channel) now make up more than 30% of all customers. For the leading player, Argos in the UK, this number is over 50%.

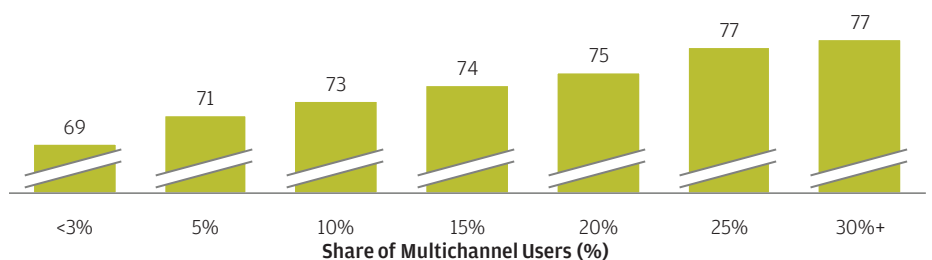
Multichannel is also an increasingly important part of the overall offer; retailers who achieve a higher proportion of multichannel

Leading Multichannel Retailers

Country	Retailer	% Multichannel Customers ('Visitors')
UK	Argos	55.8%
Brazil	Americanas	42.6%
Poland	Empik	39.2%
France	FNAC	37.4%
Poland	RTV Euro AGD	35.7%
US	Lulu Lemon	34.5%
Turkey	Vatan Bilgisayar	34.4%
UK	John Lewis	34.3%
US	GameStop	33.7%
Poland	IKEA	32.5%

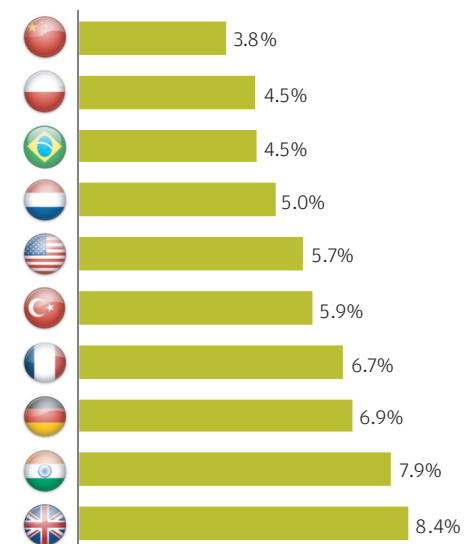
customers are on average rated higher overall while those with few multichannel customers underperform. This is reflective of the fact that multichannel customers represent a retailer's best customers, on average rating the same retailer 4-8% higher than a single channel customer and spending significantly more as well. Winners in this space are developing their propositions to combine the strengths of both channels. For example, british fashion retail Hobbs, who receive c.30% higher ratings from their multichannel customers than store-only ones, is able to tell customers on their website the level of stock they have available in specific sizes in specific stores. As Click & Collect becomes an increasingly important part of a retailer's arsenal this level of visibility can be a powerful advantage.

Rating, by Proportion of Multichannel Customers<sup>1</sup>



1. Cohorts of Retailers by % of Multichannel Shoppers

Difference in Score, Multi- vs Monochannel Shopper



# THE OC&C PROPOSITION INDEX 2014 – THE RATING OF OVERALL RETAIL PROPOSITION BY CONSUMERS VISITING OR PURCHASING

Rank	Company	Category	Country	Score <sup>1</sup>	Chg <sup>2</sup>	Rank	Company	Category	Country	Score <sup>1</sup>	Chg <sup>2</sup>
1	Amazon	Gen Merch	US UK FR DE NL PL CN IN	89.3	-0.7	51	Leclerc	Grocery	FR PL	81.8	0.5
2	DM	Health & Beauty	DE	88.5	2.3	52	Ebay	Gen Merch	US UK FR DE PL IN	81.7	0.9
3	Picard	Grocery	FR	87.9	1.8	53	Jockey	Clothing & Footwear	IN	81.6	-
4	Yves Rocher	Health & Beauty	FR	86.7	0.9	54	JD	Gen Merch	CN	81.6	-
5	Publix	Grocery	US	86.2	2.4	55	Empik	Entertainment	PL	81.5	-0.1
6	Costco	Club	US	85.9	0.7	56	Fryselectronics	Electricals	US	81.5	-
7	John Lewis	Department Stores	UK	85.7	1.1	57	Kaufland	Grocery	DE	81.4	2.2
8	Flipkart.com	Gen Merch	IN	85.4	4.2	58	Healthspan	Health & Beauty	UK	81.4	0.9
9	Allegro	Gen Merch	PL	85.2	2.9	59	Bijenkorf	Department Stores	NL	81.4	2.5
10	Trader Joes	Grocery	US	85.0	0.1	60	Home Bargains	Discount	UK	81.4	1.2
11	Bol.com	Entertainment	NL	84.7	1.0	61	Farfetch	Clothing & Footwear	UK	81.4	-
12	Apple	Electricals	US UK FR	84.6	0.2	62	FNAC	Electricals	FR	81.3	-0.8
13	Thiriet	Food Service & QSR	FR	84.6	1.8	63	Marionnaud	Health & Beauty	FR	81.3	1.1
14	Netshoes	Sports & Outdoors	BR	84.4	2.1	64	Lowe's	DIY	US	81.2	0.0
15	Bath and Body Works	Health & Beauty	US	84.2	0.6	65	Mavi Jeans	Clothing & Footwear	TR	81.2	-
16	Barnes & Noble	Entertainment	US	84.1	3.0	66	Truffaut	Other	FR	81.2	-
17	Lush	Health & Beauty	UK	84.1	-	67	Tchibo	Department Stores	DE	81.1	0.2
18	Nordstrom	Department Stores	US	84.0	3.6	68	P&C	Clothing & Footwear	DE	81.0	4.1
19	Vente-privée	Clothing & Footwear	FR	84.0	0.3	69	Hepsiburada	Gen Merch	TR	80.9	-
20	iTunes	Entertainment	US FR	83.9	-0.2	70	Whole Foods	Grocery	US	80.9	1.4
21	M&S Simply Food	Grocery	UK	83.9	1.4	71	Darty	Electricals	FR	80.9	3.3
22	BJs wholesale	Club	US	83.7	3.8	72	newegg	Electricals	US	80.8	-3.4
23	Rossmann	Health & Beauty	DE PL TR	83.7	-2.6	73	Bloomingdale's	Department Stores	US	80.8	4.5
24	L'Occitane	Health & Beauty	FR	83.5	2.5	74	Walmart	Grocery	US CN BR	80.8	0.9
25	Waitrose	Grocery	UK	83.3	3.1	75	Hering	Clothing & Footwear	BR	80.7	-1.5
26	Decathlon	Sports & Outdoors	FR BR	83.3	1.4	76	Americanas	Department Stores	BR	80.6	1.6
27	Victoria's Secret	Clothing & Footwear	US	83.2	1.3	77	M&S	Clothing & Footwear	UK IN	80.6	0.9
28	IKEA	Furniture	US UK FR NL PL CN	83.2	0.5	78	GameStop	Entertainment	US	80.6	3.3
29	Sephora	Health & Beauty	US FR PL CN TR	83.1	-3.1	79	Zappos	Clothing & Footwear	US	80.5	1.4
30	Espace Culturel Leclerc	Entertainment	FR	83.0	1.4	80	Kohl's	Department Stores	US	80.5	0.5
31	T-Mall	Gen Merch	CN	83.0	2.7	81	PetSmart	Other	US	80.5	0.4
32	Cultura	Entertainment	FR	82.9	-0.9	82	Histoire d'Or	Jewellery	FR	80.5	-
33	Breuninger	Department Stores	DE	82.8	7.5	83	C&A	Clothing & Footwear	FR DE NL PL CN BR TR	80.4	-0.4
34	Saraiva	Entertainment	BR	82.6	-0.0	84	Selfridges	Department Stores	UK	80.4	4.4
35	Kiko	Health & Beauty	FR	82.6	-	85	AO.com	Electricals	UK	80.4	-
36	L.L.Bean	Clothing & Footwear	US	82.6	-1.4	86	Albert Heijn	Grocery	NL	80.3	3.5
37	Sam's Club	Club	US	82.5	1.1	87	Cdiscount	Gen Merch	FR	80.3	0.1
38	D&R	Entertainment	TR	82.5	-	88	Dunelm Mill	Gen Merch	UK	80.3	2.9
39	Douglas	Health & Beauty	DE NL PL	82.4	-0.5	89	Lidl	Grocery	UK FR DE NL PL	80.2	1.7
40	Crate and Barrel	Household	US	82.4	5.2	90	Zara	Clothing & Footwear	US UK FR DE NL PL CN IN TR	80.2	2.8
41	Submarino	Department Stores	BR	82.4	5.0	91	Taobao	Gen Merch	CN	80.2	2.8
42	Thalia	Entertainment	DE	82.3	-0.7	92	Old Navy	Clothing & Footwear	US	80.1	5.1
43	Aldi	Grocery	US UK DE NL	82.2	2.6	93	Leboncoin	Gen Merch	FR	80.1	-3.1
44	Neiman Marcus	Department Stores	US	82.1	5.8	94	Wilkinson	Gen Merch	UK	80.1	-0.0
45	Nocibé	Health & Beauty	FR	82.0	1.9	95	Hornbach	DIY	DE NL	80.0	1.0
46	Globus	Grocery	DE	81.9	1.8	96	Williams-Sonoma	Household	US	80.0	0.9
47	Kroger	Grocery	US	81.8	-0.2	97	Leroy Merlin	DIY	FR PL BR	80.0	-0.6
48	Drogerie Müller	Health & Beauty	DE	81.8	-	98	RT Mart	Grocery	CN	79.9	-0.3
49	Nature et Découvertes	Department Stores	FR	81.8	-0.3	99	H&M	Clothing & Footwear	US UK FR DE NL PL CN	79.9	1.7
50	Lakeland	Other	UK	81.8	0.5	100	Apert	Jewellery	PL	79.8	-4.3

<sup>1</sup> The score is the retailer's highest overall proposition rating globally. Consumer Proposition Index ratings within a country have been normalised to make them comparable globally

<sup>2</sup> Change indicates difference in overall proposition rating 2013-14



# TOP 400 RETAILERS

## CHASING AT RETAILER IN LAST 3 MONTHS (INDEXED 0-100)

Rank	Company	Category	Country	Score <sup>1</sup>	Chg <sup>2</sup>	Rank	Company	Category	Country	Score <sup>1</sup>	Chg <sup>2</sup>
101	Soliver	Clothing & Footwear	DE	79.8	1.3	151	Reebok	Clothing & Footwear	IN	78.7	-
102	Özdilek	Household	TR	79.8	-	152	Optic 2000	Optical	FR	78.7	0.3
103	Galeries Lafayette	Department Stores	FR	79.8	0.1	153	361°	Clothing & Footwear	CN	78.7	1.9
104	Botanic	Other	FR	79.8	-	154	Mothercare	Other	UK TR	78.6	-1.1
105	Dillard's	Department Stores	US	79.8	-	155	Depot	Other	DE	78.6	3.4
106	Centauro	Sports & Outdoors	BR	79.8	3.0	156	Yonghui	Grocery	CN	78.6	0.2
107	Beymen	Department Stores	TR	79.8	-	157	RTV Euro AGD	Electricals	PL	78.6	3.5
108	Body Shop	Health & Beauty	US UK	79.8	0.8	158	Biedronka (JMD)	Grocery	PL	78.6	2.0
109	Otto	Department Stores	DE	79.8	-0.2	159	AmericanEagle	Clothing & Footwear	US	78.6	-
110	Clarks	Clothing & Footwear	UK	79.7	1.2	160	Arezzo	Clothing & Footwear	BR	78.5	0.9
111	Maisons du Monde	Household	FR	79.7	0.5	161	Primera	Entertainment	NL	78.5	-
112	Boots	Health & Beauty	UK	79.7	1.3	162	Price Minister	Gen Merch	FR	78.5	-0.6
113	Farm Foods	Grocery	UK	79.7	0.3	163	Jones the Bootmaker	Clothing & Footwear	UK	78.4	-
114	Esprit	Clothing & Footwear	DE NL CN	79.6	-1.8	164	Cath Kidston	Household	UK	78.4	0.6
115	Staples	Stationers	US	79.6	1.7	165	Pague Menos	Health & Beauty	BR	78.4	-0.7
116	Zafari e Bourbon	Grocery	BR	79.6	-3.7	166	Krys	Optical	FR	78.4	-1.4
117	Kiabi	Clothing & Footwear	FR	79.6	1.8	167	Toupargel	Grocery	FR	78.3	-
118	Etam Lingerie	Clothing & Footwear	FR	79.5	-	168	Greggs	Other	UK	78.3	-0.8
119	Yihaodian	Gen Merch	CN	79.5	1.3	169	Redbaby	Other	CN	78.3	-
120	Toys R Us	Other	US UK FR	79.5	2.9	170	Bed Bath and Beyond	Household	US	78.3	0.6
121	H-E-B	Grocery	US	79.5	1.8	171	Burberry	Clothing & Footwear	UK	78.2	-
122	Vatan Bilgisayar	Electricals	TR	79.4	-	172	Anta	Sports & Outdoors	CN	78.2	-
123	Action	Household	NL	79.4	1.1	173	Next	Clothing & Footwear	UK	78.2	3.8
124	Alma Market	Grocery	PL	79.3	-0.2	174	The Range	Other	UK	78.2	0.7
125	Best Buy	Electricals	US	79.3	2.8	175	Levi's	Clothing & Footwear	IN	78.2	0.3
126	Uniqlo	Clothing & Footwear	CN	79.3	0.4	176	Waterstones	Entertainment	UK	78.2	-2.7
127	Bonprix	Clothing & Footwear	DE	79.2	-0.6	177	Lulu Lemon	Clothing & Footwear	US	78.2	5.4
128	Specsavers	Optical	UK	79.2	-1.2	178	Conrad Elektronik	Electricals	DE	78.1	2.1
129	Super-Pharm	Health & Beauty	PL	79.2	1.5	179	Only	Clothing & Footwear	CN	78.1	0.5
130	Asda	Grocery	UK	79.1	0.5	180	Hema	Department Stores	NL	78.1	1.2
131	Ace Hardware	DIY	US	79.1	1.2	181	Camaieu	Clothing & Footwear	FR	78.1	1.9
132	Castorama	DIY	FR PL	79.1	0.5	182	Jardiland	Other	FR	78.1	-
133	Darjeeling	Clothing & Footwear	FR	79.1	-	183	M&M Direct	Clothing & Footwear	UK	78.0	0.7
134	Suning	Electricals	CN	79.0	1.1	184	Miss Etam	Clothing & Footwear	NL	78.0	1.2
135	Target	Gen Merch	US	79.0	0.2	185	DirkBasDigros	Grocery	NL	78.0	2.0
136	Teknosa	Electricals	TR	79.0	-	186	Etos	Health & Beauty	NL	78.0	3.5
137	Orlen	Service Station	PL	79.0	2.3	187	Migros	Grocery	TR	78.0	-
138	Oxybul Eveil et Jeux	Other	FR	79.0	-	188	Pandora	Jewellery	PL	78.0	4.2
139	Hunkemöller	Clothing & Footwear	NL	78.9	-	189	Forever21	Clothing & Footwear	US CN	78.0	-
140	Jules	Clothing & Footwear	FR	78.9	1.5	190	Debenhams	Department Stores	UK	78.0	0.6
141	Tamaris	Clothing & Footwear	DE	78.8	-	191	Dawanda	Other	DE	78.0	3.6
142	Macy's	Department Stores	US	78.8	-0.0	192	Bata	Clothing & Footwear	IN	77.9	-
143	The Home Depot	DIY	US	78.8	0.1	193	Alain Afflelou	Optical	FR	77.9	1.3
144	Auchan	Grocery	FR PL CN	78.7	-1.0	194	Pottery Barn	Household	US	77.9	6.0
145	LC Waikiki	Clothing & Footwear	TR	78.7	-	195	Asos	Clothing & Footwear	UK DE	77.9	-0.8
146	Iceland	Grocery	UK	78.7	1.9	196	Piotr i Paweł	Grocery	PL	77.9	-0.4
147	Zalando	Clothing & Footwear	FR DE NL	78.7	1.0	197	Panvel	Health & Beauty	BR	77.8	-0.7
148	Argos	Gen Merch	UK	78.7	-0.6	198	Boulanger	Electricals	FR	77.8	1.0
149	Watsons	Health & Beauty	CN TR	78.7	0.8	199	Dafiti	Clothing & Footwear	BR	77.7	-1.0
150	O2	Electricals	UK DE	78.7	4.2	200	Vakko	Department Stores	TR	77.7	-

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# THE OC&C PROPOSITION INDEX 2014 – THE

## RATING OF OVERALL RETAIL PROPOSITION BY CONSUMERS VISITING OR PURC

Rank	Company	Category	Country	Score <sup>1</sup>	Chg <sup>2</sup>	Rank	Company	Category	Country	Score <sup>1</sup>	Chg <sup>2</sup>
201	Deichmann	Clothing & Footwear	DE	77.7	-0.2	251	DA	Health & Beauty	NL	76.7	3.4
202	Wehkamp	Clothing & Footwear	NL	77.7	-0.6	252	Bauhaus	DIY	DE	76.7	0.9
203	Cyberport	Electricals	DE	77.7	6.3	253	Gome	Electricals	CN	76.7	0.2
204	Spartoo	Clothing & Footwear	FR	77.6	4.3	254	Casas Bahia	Furniture	BR	76.6	-1.6
205	Edeka	Grocery	DE	77.6	-0.6	255	Poundland	Discount	UK	76.6	0.9
206	Saks Fifth Avenue	Department Stores	US	77.6	-0.7	256	Big Bazaar	Grocery	IN	76.6	2.3
207	Fast Track	Gen Merch	IN	77.5	-	257	Walgreens	Health & Beauty	US	76.6	0.0
208	Printemps	Department Stores	FR	77.5	-1.3	258	Aeropostale	Clothing & Footwear	US	76.6	1.2
209	CVS	Health & Beauty	US	77.5	2.0	259	Ocado	Grocery	UK	76.6	1.2
210	Bonobo	Clothing & Footwear	FR	77.5	4.1	260	Jcrew	Clothing & Footwear	US	76.6	-1.7
211	Ernstings Family	Clothing & Footwear	DE	77.5	-1.3	261	Optical Centre	Optical	FR	76.6	0.4
212	JouéClub	Other	FR	77.5	-	262	QVC	Other	DE	76.6	0.1
213	La Pataterie	Food Service & QSR	FR	77.4	2.6	263	Louis Philippe	Clothing & Footwear	IN	76.6	1.2
214	Metro	Grocery	DE CN	77.4	0.2	264	Carrefour	Grocery	FR PL CN BR	76.6	0.5
215	Hobbycraft	Other	UK	77.4	3.1	265	JC Penney	Department Stores	US	76.6	4.6
216	Gamm Vert	Other	FR	77.4	-	266	La Redoute	Clothing & Footwear	FR	76.6	-0.3
217	Blokker	Household	NL	77.4	3.7	267	Gamma	DIY	NL	76.5	2.5
218	Reserved	Clothing & Footwear	PL	77.4	0.4	268	Boots Opticians	Optical	UK	76.5	2.1
219	Ki ilı	Clothing & Footwear	TR	77.3	-	269	Princesse Tam Tam	Clothing & Footwear	FR	76.5	-
220	GAP	Clothing & Footwear	US UK CN TR	77.3	0.1	270	Groenrijk	Garden Centres	NL	76.5	-
221	Red Star Macalline	Furniture	CN	77.3	-	271	Fat face	Clothing & Footwear	UK	76.5	3.8
222	True Value	DIY	US	77.3	1.5	272	Koton	Clothing & Footwear	TR	76.5	-
223	VIP Shop	Clothing & Footwear	CN	77.2	-	273	Drogarias Pacheco	Health & Beauty	BR	76.5	-1.2
224	Defacto	Clothing & Footwear	TR	77.2	-	274	Van Heusen	Clothing & Footwear	IN	76.5	1.2
225	Mediamarkt	Electricals	DE NL PL TR	77.2	1.3	275	Riachuelo	Clothing & Footwear	BR	76.4	-1.7
226	Charles Tyrwhitt	Clothing & Footwear	UK	77.2	-	276	Ebuyer	Electricals	UK	76.4	0.5
227	Banana Republic	Clothing & Footwear	US	77.2	-1.0	277	Rouge Gorge	Clothing & Footwear	FR	76.4	-
228	Schuh	Clothing & Footwear	UK	77.1	3.2	278	Jumbo	Grocery	NL	76.4	0.4
229	Pets at Home	Other	UK	77.1	1.6	279	Burlington	Clothing & Footwear	US	76.4	-
230	Dobbies	Household	UK	77.1	-1.3	280	Droga Raia	Health & Beauty	BR	76.4	0.4
231	Hotter Shoes	Clothing & Footwear	UK	77.1	-0.9	281	Notebooksbilliger	Electricals	DE	76.4	2.4
232	Rewe	Grocery	DE	77.1	2.5	282	BCC	Electricals	NL	76.4	3.7
233	River Island	Clothing & Footwear	UK	77.0	3.1	283	Cache Cache	Clothing & Footwear	FR	76.4	1.0
234	Metersbonwe	Clothing & Footwear	CN	77.0	1.3	284	Brico Dépôt	DIY	FR	76.4	0.2
235	Li Ning	Clothing & Footwear	CN	77.0	-0.7	285	New Look	Clothing & Footwear	UK CN	76.3	0.7
236	Tom Tailor	Clothing & Footwear	DE	77.0	0.3	286	Kruidvat	Health & Beauty	NL	76.3	1.0
237	Marisa	Clothing & Footwear	BR	77.0	-2.0	287	Armand Thiery	Clothing & Footwear	FR	76.3	-0.1
238	Dollar Tree	Discount	US	76.9	-0.3	288	Richer Sounds	Electricals	UK	76.3	-1.9
239	Celio	Clothing & Footwear	FR IN	76.9	-5.6	289	BP Polska	Service Station	PL	76.3	1.3
240	B&M Bargains	Discount	UK	76.9	1.3	290	Markafoni	Clothing & Footwear	TR	76.3	-
241	Görtz	Clothing & Footwear	DE	76.9	3.5	291	Intertoys	Entertainment	NL	76.3	2.1
242	English Home	Household	TR	76.8	-	292	Merlin	Gen Merch	PL	76.2	1.5
243	Park Avenue	Clothing & Footwear	IN	76.8	-	293	Conns	Electricals	US	76.2	-
244	99p store	Discount	UK	76.8	1.5	294	ICI Paris XL	Health & Beauty	NL	76.2	-
245	Koçtas	DIY	TR	76.8	-	295	Alinea	Household	FR	76.2	-0.4
246	Bruna	Entertainment	NL	76.8	2.6	296	Trendyol	Clothing & Footwear	TR	76.2	-
247	Lloyds Pharmacy	Health & Beauty	UK	76.8	3.6	297	Jack&Jones	Clothing & Footwear	NL CN IN	76.2	-0.1
248	Promod	Clothing & Footwear	FR	76.7	1.6	298	Plus	Grocery	NL	76.2	4.9
249	Xenos	Household	NL	76.7	1.9	299	TJ Maxx	Clothing & Footwear	US	76.1	0.7
250	Système U	Grocery	FR	76.7	1.1	300	Superdry	Clothing & Footwear	UK	76.1	2.8

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<sup>2</sup> Change indicates difference in overall proposition rating 2013-14

# TOP 400 RETAILERS

## CHASING AT RETAILER IN LAST 3 MONTHS (INDEXED 0-100)

Rank	Company	Category	Country	Score <sup>1</sup>	Chg <sup>2</sup>	Rank	Company	Category	Country	Score <sup>1</sup>	Chg <sup>2</sup>
301	Moss Bros	Clothing & Footwear	UK	76.1	7.2	351	Lifestyle	Department Stores	IN	75.4	0.4
302	Damat	Clothing & Footwear	TR	76.1	-	352	Carphone Warehouse	Electricals	UK	75.3	0.1
303	House of Fraser	Department Stores	UK	76.1	1.6	353	Century Mart	Grocery	CN	75.3	2.9
304	Sarenza	Clothing & Footwear	FR	76.1	0.0	354	Pão de Açucar	Grocery	BR	75.3	0.3
305	Vanguard	Grocery	CN	76.1	0.7	355	Pernambucanas	Department Stores	BR	75.3	-0.3
306	OBI	DIY	DE PL	76.1	-0.0	356	Matalan	Clothing & Footwear	UK	75.3	-0.3
307	Buy.com / Rakuen	Gen Merch	US	76.0	-	357	Westside	Department Stores	IN	75.3	4.8
308	Siciliano	Entertainment	BR	76.0	-0.4	358	Madame Coco	Household	TR	75.3	-
309	Saturn	Electricals	DE NL PL	76.0	-0.8	359	Kurt Geiger	Clothing & Footwear	UK	75.2	3.7
310	Drogaria SP	Health & Beauty	BR	76.0	-3.3	360	Extra	Grocery	BR	75.2	-0.5
311	Louis Pion	Jewellery	FR	76.0	-	361	Mannings	Health & Beauty	CN	75.2	1.1
312	Mudo	Clothing & Footwear	TR	76.0	-	362	Vero Moda	Clothing & Footwear	NL CN IN	75.2	-1.5
313	Go Outdoors	Sports & Outdoors	UK	76.0	0.7	363	CarrefourSA	Grocery	TR	75.2	-
314	Intermarche	Grocery	FR PL	76.0	-0.6	364	Jabong.com	Clothing & Footwear	IN	75.1	3.8
315	Intratuin	Garden Centres	NL	75.9	-	365	Welkoop/Boerenbond	Garden Centres	NL	75.1	-
316	Daphne	Clothing & Footwear	CN	75.9	2.5	366	Etam	Clothing & Footwear	FR CN	75.1	-2.2
317	Primark	Clothing & Footwear	UK DE NL	75.9	-0.9	367	Toyyz Shop	Other	TR	75.1	-
318	Dumond	Clothing & Footwear	BR	75.9	2.8	368	Maplin	Electricals	UK	75.1	2.1
319	Boohoo.com	Clothing & Footwear	UK	75.9	-	369	B&Q	DIY	UK	75.0	1.2
320	Urban Outfitters	Clothing & Footwear	US	75.9	3.3	370	Shell	Service Station	PL	75.0	-1.8
321	Hammerschlemmer	Electricals	US	75.9	-	371	Belle	Clothing & Footwear	CN	75.0	-2.9
322	Bargain Booze	Grocery	UK	75.9	3.2	372	Brooks Brothers	Clothing & Footwear	US	75.0	-5.6
323	B M	Grocery	TR	75.8	-	373	Lojas Yamada	Department Stores	BR	75.0	7.5
324	Harrods	Department Stores	UK	75.8	0.6	374	Ted Baker	Clothing & Footwear	UK	75.0	1.0
325	3	Electricals	UK	75.7	-	375	Makro	Grocery	NL	75.0	0.6
326	De Slegte	Entertainment	NL	75.7	2.6	376	Les 3 Suisses	Clothing & Footwear	FR	74.9	0.5
327	Lojas Renner	Clothing & Footwear	BR	75.7	-0.7	377	Van Haren	Clothing & Footwear	NL	74.9	1.0
328	dangdang	Gen Merch	CN	75.7	-1.2	378	Myntra.com	Clothing & Footwear	IN	74.8	5.1
329	Sainsbury's	Grocery	UK	75.7	-1.2	379	Mango	Clothing & Footwear	IN TR	74.8	4.0
330	Ross Stores	Department Stores	US	75.7	2.2	380	Hhgregg	Electricals	US	74.8	-
331	Allen Solly	Clothing & Footwear	IN	75.7	-	381	Net-a-Porter	Clothing & Footwear	UK	74.8	7.1
332	Hagebau	DIY	DE	75.7	1.7	382	Sarar	Clothing & Footwear	TR	74.7	-
333	Vision Express	Optical	UK	75.6	4.3	383	Superdrug	Health & Beauty	UK	74.7	0.5
334	Generale d'Optique	Optical	FR	75.6	-1.0	384	The Sting	Clothing & Footwear	NL	74.7	-0.1
335	Gratis	Health & Beauty	TR	75.6	-	385	V&D	Department Stores	NL	74.7	1.9
336	Paperchase	Stationers	UK	75.6	-0.4	386	Besson	Clothing & Footwear	FR	74.6	-
337	Intersport	Sports & Outdoors	FR	75.6	-0.2	387	Yixun	Gen Merch	CN	74.6	-
338	Magazine Luiza	Department Stores	BR	75.5	-1.5	388	Stop & Shop	Grocery	US	74.6	-1.6
339	Dorothy Perkins	Clothing & Footwear	UK	75.5	2.3	389	Jumei	Health & Beauty	CN	74.5	-
340	WuMart	Grocery	CN	75.5	-1.2	390	Weltbild	Entertainment	DE	74.5	-
341	Atol	Optical	FR	75.5	2.4	391	Brioche Dorée	Food Service & QSR	FR	74.5	1.3
342	Kaufhof	Department Stores	DE	75.5	0.8	392	Levis	Clothing & Footwear	TR	74.5	-
343	Buffalo Grill	Food Service & QSR	FR	75.5	0.6	393	Statoil	Service Station	PL	74.5	1.8
344	La Grande Récré	Other	FR	75.5	-	394	Gemo	Clothing & Footwear	FR	74.4	-0.5
345	Save-A-Lot	Grocery	US	75.4	0.5	395	Zodiac	Clothing & Footwear	IN	74.4	3.1
346	Bart Smit	Entertainment	NL	75.4	2.6	396	Goldsmiths	Jewellery	UK	74.4	3.3
347	Praxis	DIY	NL	75.4	2.4	397	H. Samuel	Jewellery	UK	74.4	4.8
348	Drogasil	Health & Beauty	BR	75.4	-1.0	398	Holland & Barrett	Health & Beauty	UK	74.4	0.1
349	Boyner	Department Stores	TR	75.4	-	399	T.K.Maxx	Department Stores	DE	74.4	6.8
350	nci	Clothing & Footwear	TR	75.4	-	400	Rite-Aid	Health & Beauty	US	74.4	2.5

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