

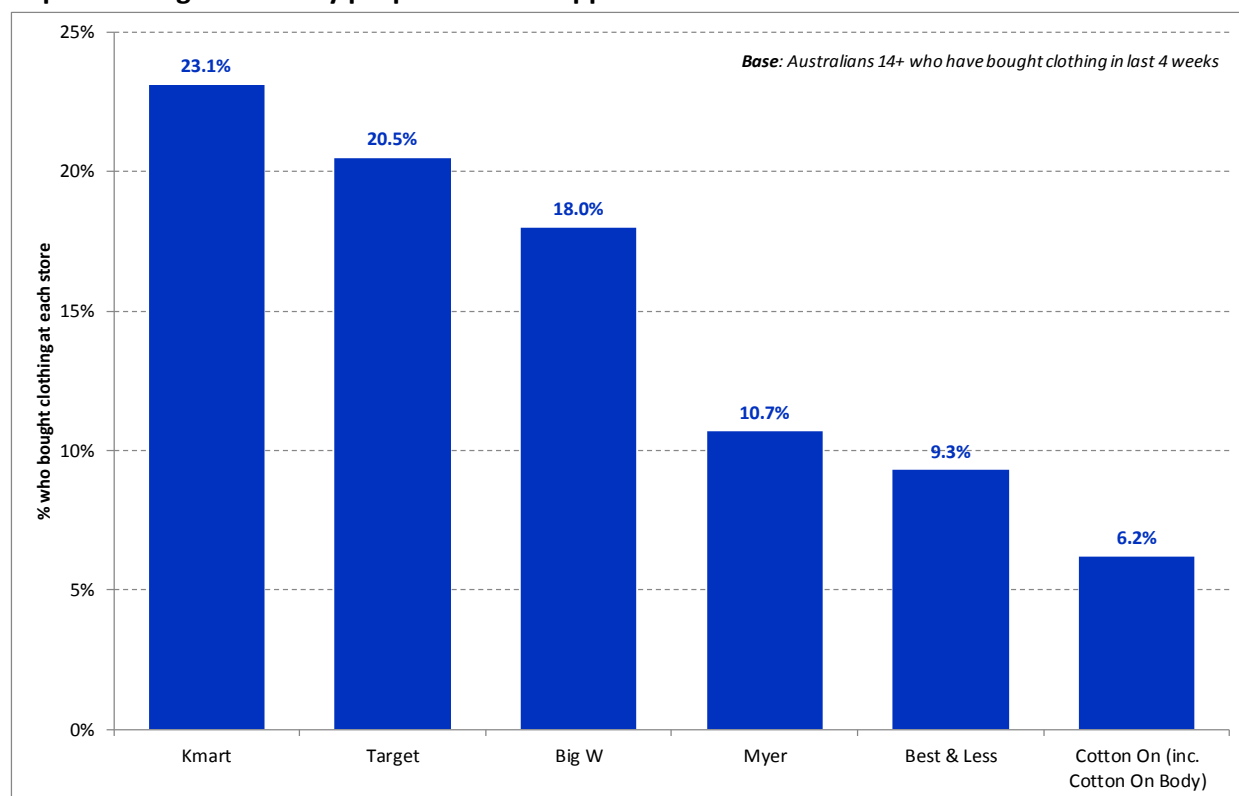
Tuesday, 18 August 2015

Retail perspectives: different ways of rating Australia's clothing stores

Who is Australia's top clothing retailer? Well, that depends on how you look at it. Different stores distinguish themselves in different ways. Some boast higher customer numbers, others take a higher share of total dollars spent, yet others stand out for the average amount their customers spend per item. The latest findings from Roy Morgan Research reveal the top retailers for each of these measures...

In any given four-week period, 10.6 million Australians aged 14+ buy at least one piece of clothing. Nearly one quarter of them (23.1%) purchase something at Kmart, making it the country's most popular clothing retailer in terms of sheer customer volume. Target also attracts heavy customer traffic (20.5% of all people buying clothes in an average four weeks), as do Big W (18.0%) and Myer (10.7%).

Top 6 clothing retailers by proportion of shoppers

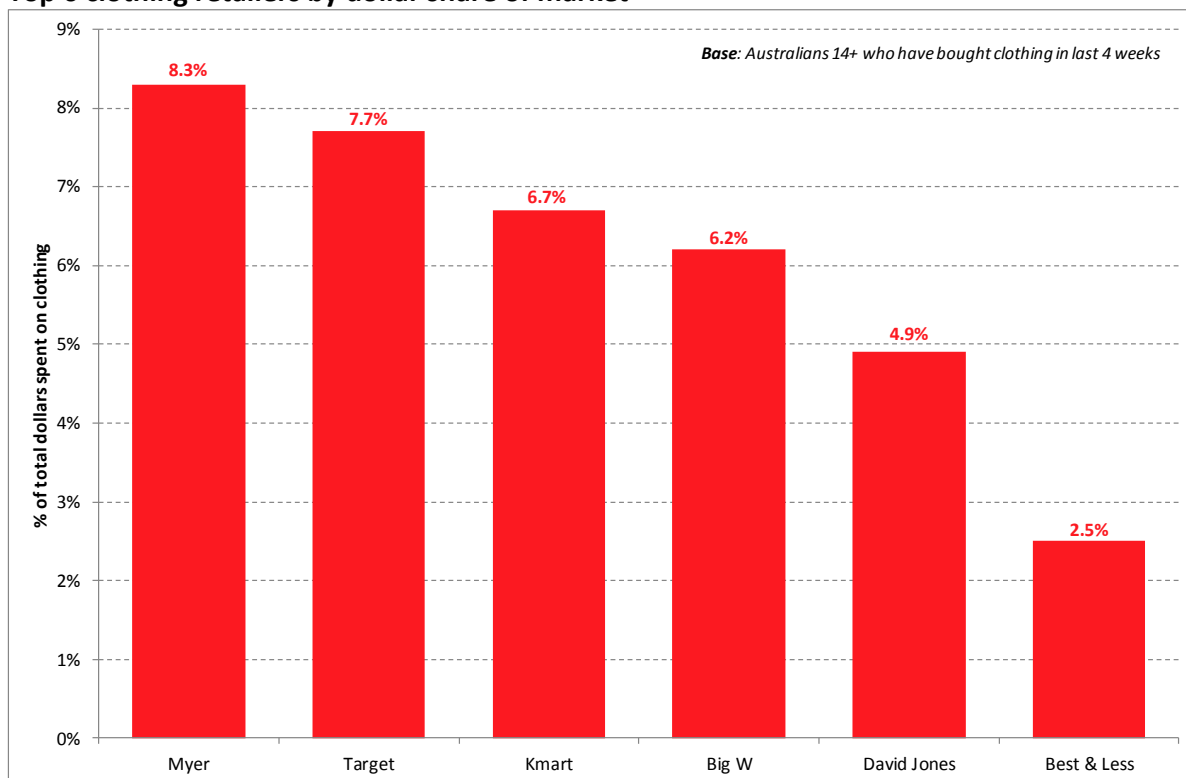


Source: Roy Morgan Single Source (Australia), July 2014 – June 2015 (n=8,114).

Five of these popular stores also feature among the six retailers with the largest share of total dollars spent on clothing in an average four weeks. However, there is a marked difference in their rankings, with Myer accounting for the largest dollar share of the market (8.3%), ahead of Target (7.7%), Kmart (6.7%) and Big W (6.2%).

Taking 4.9% of total dollars spent in an average four weeks, David Jones slots into fifth place. Despite having the third-largest share of clothing shoppers, Best & Less slips to sixth when viewed in terms of overall dollar share.

Top 6 clothing retailers by dollar share of market



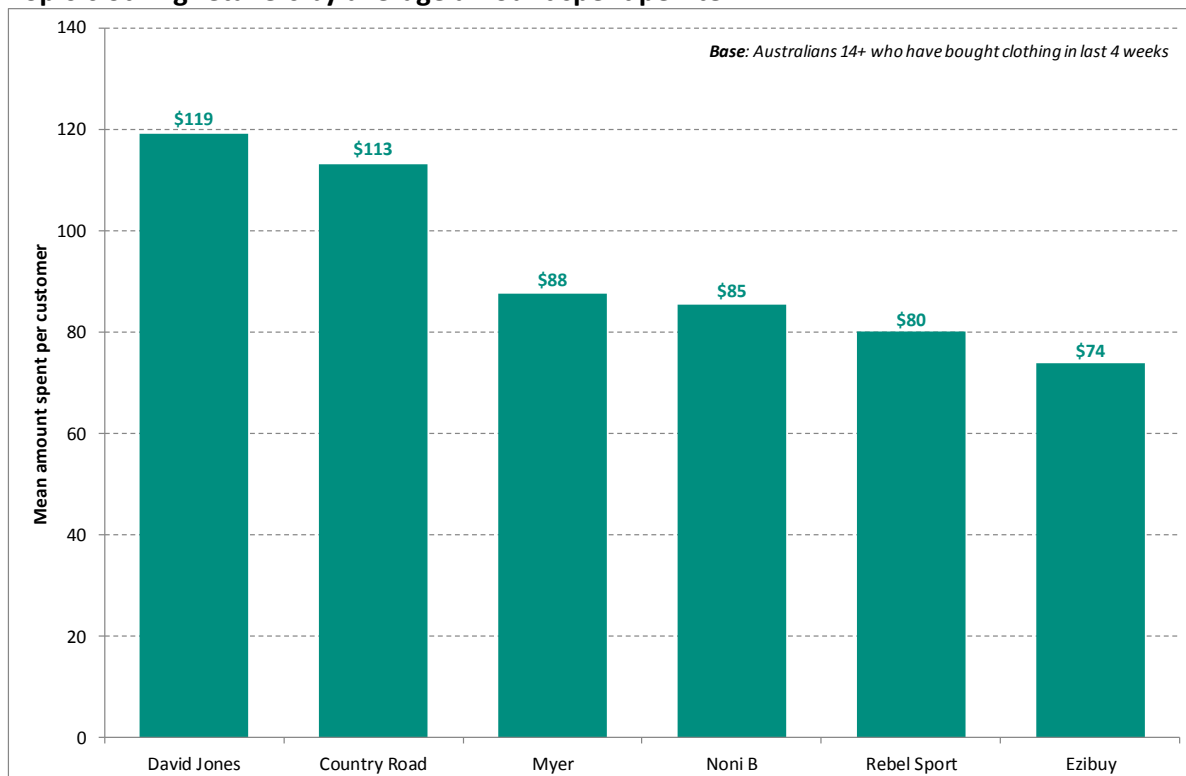
Source: Roy Morgan Single Source (Australia), July 2014 – June 2015 (n=27,005).

When it comes to average amount spent per item, the playing field changes. David Jones emerges on top, with its customers spending around \$119 per item in any given four weeks. Country Road's customers are also among the biggest spenders per item (\$113), while only a few dollars separate Myer (\$87) and Noni B (\$83) shoppers.

Although stores such as Kmart, Big W and Target may be heavy-hitters in other ways, they rank relatively low for average spend.

(Continued over...)

Top 6 clothing retailers by average amount spent per item



Source: Roy Morgan Single Source (Australia), July 2014 – June 2015 (n=27,005).

Andrew Price, General Manager – Consumer Goods, Roy Morgan Research, says:

“There are many different ways to measure a clothing retailer’s place in the market: customer numbers, market share and average spend are just a few.

“Our findings confirm that while a high volume of customers often leads to a higher market share, it doesn’t appear to have a lot of bearing on the average amount each shopper spends per item.

“The key for clothing retailers is to understand exactly who their shoppers are: from their age and life stage to their financial circumstances. Customers of stores like Kmart, Target and Big W are most likely to be under 35 and married with kids – and thus likely to appreciate the lower prices of these discount department stores.

“In contrast, David Jones and Myer shoppers are most likely to be older (between 50 and 64 years) and live in childless households, often with higher discretionary spending power -- very handy for shopping at the higher-end department stores...”

For comments or more information about Roy Morgan Research’s retail data, please contact:

Vaishali Nagaratnam

Office: +61 (3) 9224 5309

Vaishali.Nagaratnam@roymorgan.com

Related research findings

View our extensive range of [retail reports and profiles](#), including [Clothing Store customer profiles](#) and [Department Store customer profiles](#).

Compiled with data from Roy Morgan's Single Source survey (the largest of its kind in the world, with 50,000 respondents p.a), these ready-made profiles provide a broad understanding of the target audience, in terms of demographics, attitudes, activities and media usage in Australia.

About Roy Morgan Research

Roy Morgan Research is the largest independent Australian research company, with offices in each state of Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research has over 70 years' experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
7,500	±1.1	±1.0	±0.7	±0.5
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2