

Holiday 2014 wrap THE SEQUEL



THIS INTERACTIVE REPORT REQUIRES ACROBAT READER X OR LATER AND UP-TO-DATE FLASH PLAYER INSTALLED.



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You Tube

<https://www.youtube.com/playlist?list=PLUOVdjrlLRF6g452wwk-Mg1a3C7lkkoIK>



SmugMug PRO

wppholidaywrap.smugmug.com



'Click to Play'



This report is stuffed full of commercials, interactive promos, videos and links. Wherever you see the hand, simply 'Click to Play'!

This time last year, we took on the gargantuan task of gathering the best of holiday retail from around the globe, and squeezing it into a report called Holiday Wrap. And just as "Home Alone 2: Lost in New York", and "The Santa Clause 2" followed in the footsteps of their movie predecessors, this is Holiday Wrap: The Sequel.

As a general rule, sequels can sometimes be less satisfying than the original. But we found instead that the holiday season just gone was a blockbuster. By and large, marketers were even more ingenious this time around in their efforts to cajole consumers into spending at what is the most critical season for spending.

Once again, we were indebted to WPP agencies around the world in providing a snapshot of the 2014/2015 holiday season. We were overwhelmed with submissions from Sydney to Sao Paulo, and all points in between. Picture Santa at the North Pole up to his beard in Christmas letters - we were similarly swamped with Christmas campaigns in all shapes and sizes.

It's taken us the last couple of months to go through all the ideas, sort them, vote on them, and assemble them into this report. Experience has told us that this is the time when retailers are in full planning mode for the next holiday season. So hopefully this report is timely, and can be used as input in ensuring a successful holiday 2015/16.

Thanks to everyone who contributed. We feel proud to be part of what is truly the most awesome retail intelligence network in the world.

Enjoy!

Curators, The Holiday Wrap

Jon Bird
Y&R Labstore



March 2015

David Roth
CEO, The Store WPP, EMEA & Asia



HOW TO USE 'HOLIDAY WRAP'

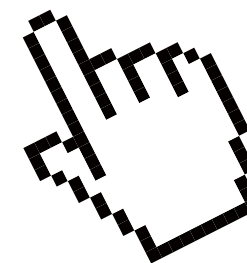
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We have curated this wrap to help you navigate and review the 2014/5 holiday session and gain insight to help preparations for holiday 2015/6.

There are several parts to the Wrap, each of which will enable you to gain access to the incredible material sent to us from your colleagues throughout WPP.

We urge you to explore all of them especially the country specific data and presentations, as they contain invaluable insights and stimulus that will help you and your clients.

And here they are...



Summary Wrap

It summarises and gives our perspective, but simply can't include all the material. As a result, we have created other strands that give you more.

Pictures Gallery

In retail, a picture really does paint a thousand words. That's why we've created a SmugMug picture gallery. It gives you access to all images, each organised by category and country for you to explore and download.

<http://www.wppholidaywrap.smugmug.com/>

Videos

Here, we've compiled all the videos to which we refer in the summary Wrap into one YouTube channel. We've also included the ones that didn't make it here, but are still a 'must see'.

<https://www.youtube.com/playlist?list=PLUOVdjr1LRF6g452wwk-Mg1a3C7lkkolK>

HOW WE WENT ABOUT IT...

5



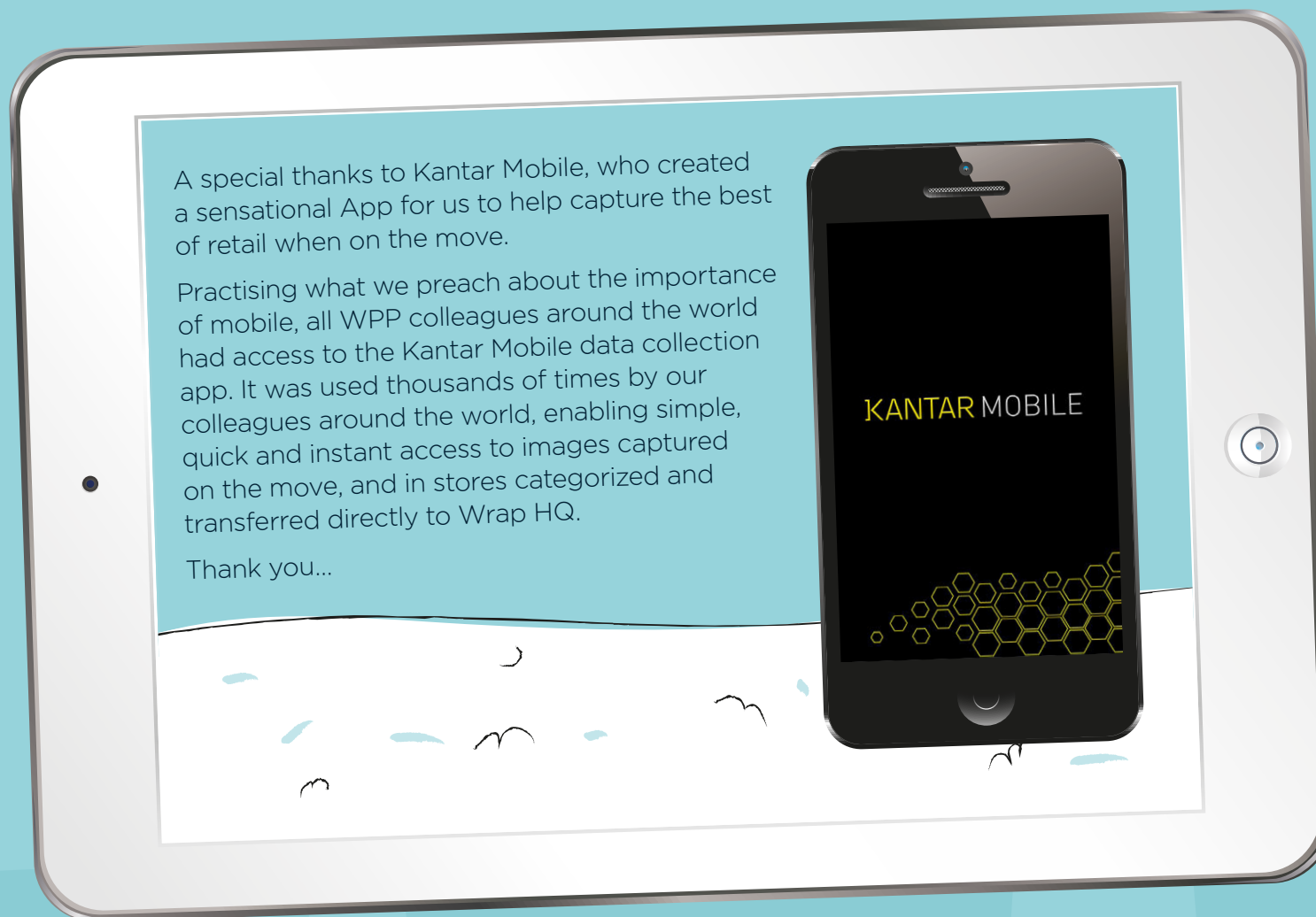
In November 2014, we invited contributions from WPP agencies around the world, through social media via #holidaywrap2014, as well as through traditional email.

That was the easy part -- from our point of view, anyway. ("Ask and ye shall receive!").

The hard part was making sense of it all.

First, Zac Kraemer and Huanchao Tang at Labstone Global with Margarita Ylla at The Store WPP sorted, sifted and selected the information. Then, we had a session at Y&R in New York City in January 2015 with Gwen Morrison from WPP

The Store in Chicago, plus Hillary Steinberg from Y&R Global Intelligence, where we compared notes and developed some initial findings. And in the last couple of months, we tested our findings, gathered retailers' results, and put together this presentation.



A special thanks to Kantar Mobile, who created a sensational App for us to help capture the best of retail when on the move.

Practising what we preach about the importance of mobile, all WPP colleagues around the world had access to the Kantar Mobile data collection app. It was used thousands of times by our colleagues around the world, enabling simple, quick and instant access to images captured on the move, and in stores categorized and transferred directly to Wrap HQ.

Thank you...

Kantar Mobile

The Kantar Mobile App is a mobile data collection platform used by Kantar companies to enhance the market research experience for research participants. The app makes completing surveys easy and convenient for people, enabling Kantar companies to gather consumer insights through mobile capabilities in the best possible ways for the users, ultimately helping organizations make better, more informed decisions.

'tis the season to be Blurring

Once upon a time, the Holiday Season was neatly separated and sectioned off. Christmas was Christmas, Hanukkah was Hanukkah and never the celebrations should meet. Non-Christian countries really didn't embrace Santa and all the trimmings. Black Friday was an American tradition, and it didn't start till Friday when the sales began and the run to December 25th commenced. The quaintly titled 'Boxing Day' on December 26th was the kick-off for the post-Christmas sales in the UK, Canada and Australia. Physical retail and digital retail kept their distance. And so it went.

This last Season, however, more than ever, saw a melding, a merging, a mash-up of all things Holiday. For one thing, Christmas and Hannukah pretty much coincided, with the latter ending on December 24. But apart from calendars lining up, the ongoing globalisation and digitisation of the retail world meant that lines were blurred more than ever.

Not only was 'Christmas' celebrated from a retail perspective in many countries no matter the religion, but Black Friday too continued to build as a global phenomenon. It was a huge success in the UK and Brazil for example. In the US, 'Black Friday' sales started in some cases weeks earlier than the day itself, many stores opened on Thanksgiving (that used to be forbidden, or at least considered retail bad form). Hot on the heels of Black Friday was Small Business Saturday, Cyber Monday, and 'Giving Tuesday'. Boxing Day in Commonwealth countries remained, but lost some of its power.

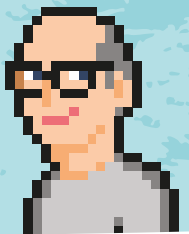
But the most important 'blurring' of the season was between offline and online. This was very definitely a 'Click & Collect' Christmas for instance, with retailers such as John Lewis in the UK receiving a huge boost from customers buying online but picking up in store. The best retailers ensured that the season was seamless - that customers could move from physical to digital and back again with ease. And that no matter where customers were, they were one click away from a purchase.

As you leaf through the pages of 'Holiday Wrap 2014: The Sequel', take special note of the way the best retailers blended offline and online - meshing everything from social media to in-store digital, to get the best possible result.

Compliments of the Holiday Season to you.



Jon Bird
Global Managing Director, Y&R Labstore



David Roth
CEO, The Store WPP, EMEA and Asia

Grand Prix

John Lewis

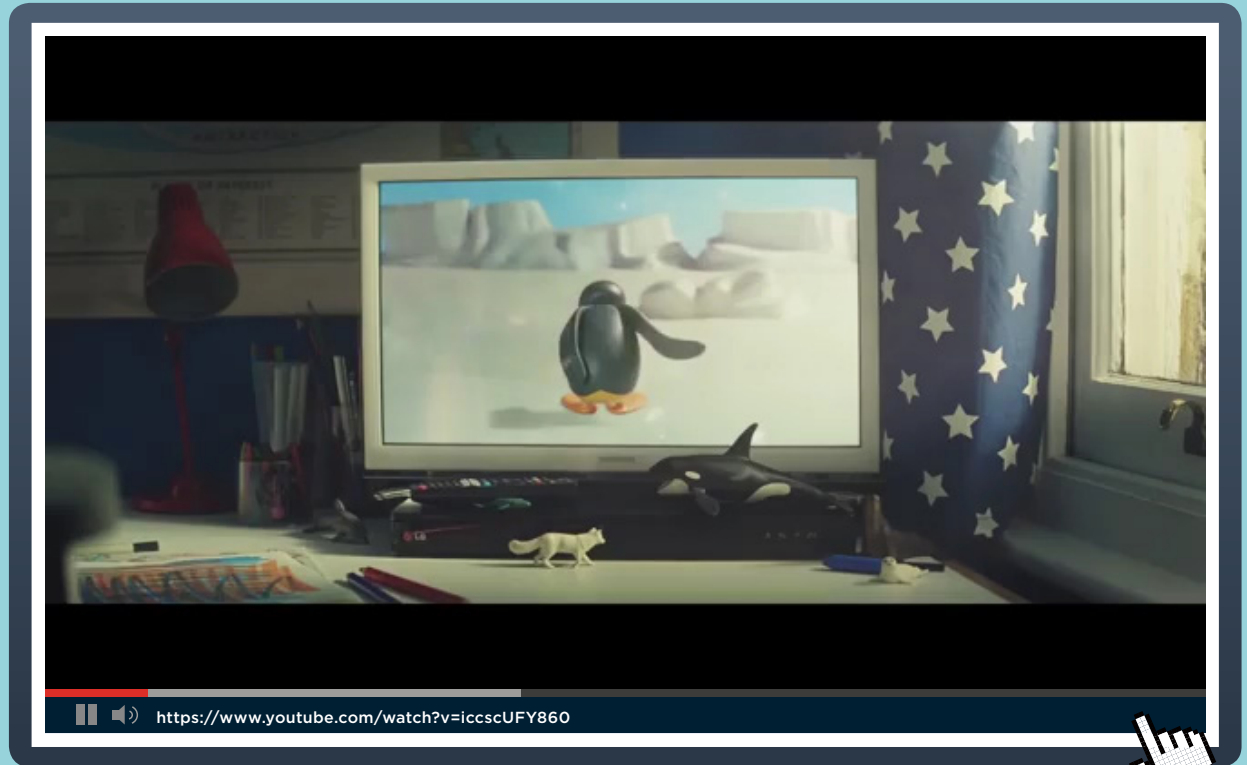
Our pick for the Grand Prix for Holiday Wrap 2014 goes to John Lewis. They have again produced a tear-jerking Christmas TV spot, featuring Tom Odell covering 'real love' by John Lennon.

The ad tells the tale of an unlikely friendship between a little boy, Sam, and his penguin friend, Monty. As the winter draws near, Sam notices Monty is sad, longing for a companion.

John Lewis ads are based on truth and human insight to ensure they are driving frequency and positive brand sentiment. This is reflected in their tagline, "Give someone the Christmas they've been dreaming of". Ultimately, it's saying "if you're looking for love and companionship, you can find it at John Lewis".

Human insight is one vital part of John Lewis' success, as is their understanding of the shareable nature of social platforms. Twenty-four hours before the ad went live, they shared the TV spot on YouTube, Facebook and Twitter, demonstrating their knowledge of the importance of the first view and the law of sharing.

With over 22 million YouTube views, it's clear that Monty and the Penguin have won the hearts of everyone.



JOHN LEWIS CHRISTMAS WINDOWS 2014

<https://www.youtube.com/watch?v=Zvf1dV0tHRs>



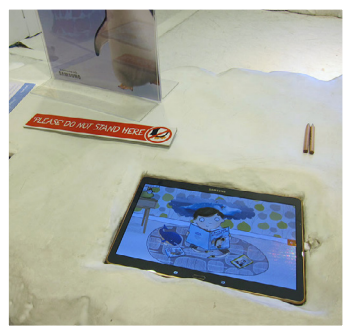
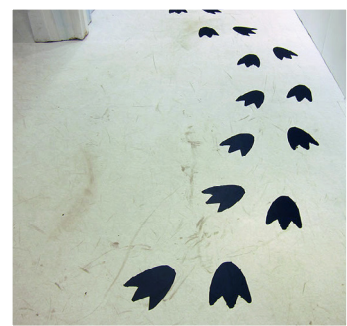
Continuing the theme with Monty the Penguin, John Lewis have created a series of playful window displays this Christmas. The store went further

than what they've done in previous years by creating the character across many platforms and presenting a consistent concept. Running alongside the TV advertising campaign, these windows have now been unveiled.

Grand Prix



Grand Prix



Once they were in-store, customers could explore Monty's winter garden, adopt a penguin, look through Monty's virtual reality goggles, download Monty's storytelling app, and much more.



TOP 5

Holiday Markets

11



1 Bryant Park, New York

Every year, Bryant Park in New York brings everyone to the park's alleys and terraces for holiday shopping. Over 125 boutique-like shops housed in custom-designed 'jewel box' kiosks offer exquisite gift ideas, from distinctive apparel to jewellery, decorative goods, local foods, and much more.

TOP 5 Holiday Markets

3 Strasbourg

Europe is famous for its extravagant and unique Christmas markets. The Strasbourg markets have been selected for the second consecutive year as the 'Best European Christmas Market'. The markets have around 300 stalls spread over 11 sites in the heart of the city. These markets are home to food and decorations typical of an Alsatian Christmas.



<https://www.youtube.com/watch?v=XkAzzbKeXeA>



2 Kris Kringle Night Market

Down under in Australia, the Kris Kringle Night Market is held annually in the Melbourne suburb of Northcote. There are over 50 stalls in the Northcote town hall and civic square, featuring local handmade items such as designer fashions, accessories, giftware, jewellery, ceramics, wood crafts, textiles, toys, plants, and more.



TOP 5

Holiday Markets



4 Aachen WeihnachtsMarkt

Every year before Christmas, the squares and streets around the Cathedral and the Town Hall in Aachen are transformed into a paradise of lights, colors and festive sounds. The vast range of original, stylish, and precious goods appeals to young and old alike. Children can take a ride on the carousel while adults enjoy the local wine, and all can share Christmas treats such as "Domino Stones", gingerbread, "Spekulatius" and marzipan bread.



5 Vienna

On New Year's Day, Vienna boasts one of the most prestigious concerts in the classical music world. But long before, from mid-November to Christmas, the city's most beautiful town squares

transform into magical Christmas markets. These romantic street markets enjoy a long tradition dating back to the middle ages. The markets have approximately 150 stands offering gifts, tree decorations, sweets and warm drinks, all of which help to create an unforgettable Christmas atmosphere.

No photos are needed for this one: watch the video for your own Viennese experience!



1 Bimba Y Lola

Bimba y Lola is a Spanish label specializing in leather bags and accessories, as well as other fashion items. This year, their Christmas windows were inspired by the social media text format, getting a cool, environmentally-friendly look that was easy to export and implement in their different markets, while keeping the local feel that's so in-demand by millennials.

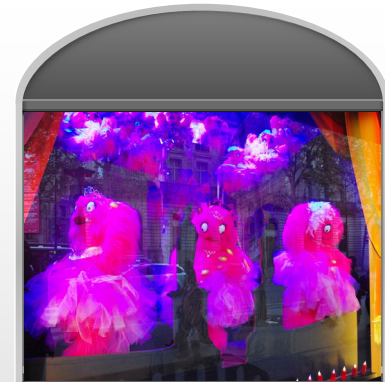


TOP 5

Local Retailers

2 Galeries Lafayette

The up-market French department store in Paris competes for the best Christmas decorations in the city with their fairy-tale world of window displays every year. The tradition is now more than 50 years old, and each window tells a themed story featuring animated puppets. For 2014, there was a refreshing twist on the traditional Christmas festivities to break through the clutter, featuring the monster, Gustave, and his band of supporting monsters.



TOP 5

Local Retailers



3 oBoticário gift truck

Transforming trucks into giant gift boxes was one of oBoticário's sales strategies for Christmas 2014. Six

vehicles travelled through 45 Brazilian cities until the 21st of December. For their Christmas campaign, the brand developed the concept of "The Christmas of oBoticário, Giving a Gift to be Present".



4 Small business Saturday - American Express

For the past five years, American Express has encouraged people to shop at small businesses across America on the Saturday after Thanksgiving. This 'Small Business Saturday' day was officially recognized by the U.S Senate in 2011, and each year, more Americans are taking part to support their local community businesses.



5 Finders Keepers Markets - Melbourne/Sydney Australia

The Finders Keepers Markets are held in Melbourne and Sydney in the lead-up to the Christmas season. They are an indie market on a colossal scale, bringing independent design to the forefront of the emerging Australian art and design community. More than 200 designers are handpicked with the goal to connect others through their resources and projects. Shoppers are able to find one-off fashions, art and design pieces, homewares, stationery, and children's toys that are truly unique -- and perfect for under the Christmas tree.



1 Bloomingdale's

The 2014 campaign for Bloomingdale's was 'Gift A Bow', consisting of window displays, television advertising, social media and interactive mobile games.

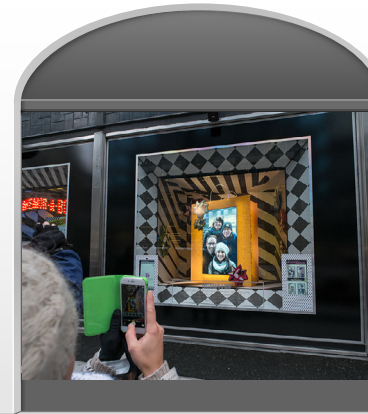
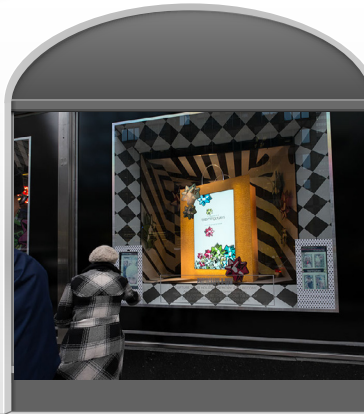
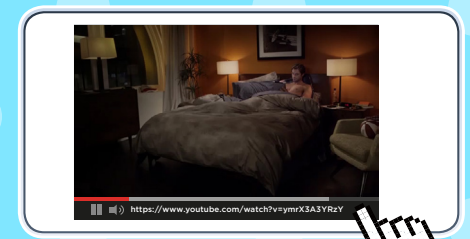
The window displays were an entirely interactive experience that included games inspired by the 'Gift a Bow' mascot along with the option to interact with windows via social media using #bloomiesgreetings.

Online, there were a series of 'Bow Knows' videos featuring Bow to help you find the ideal gift for your Christmas needs.

Bloomingdale's found a great way to demonstrate their sense of humor with this campaign, which also featured their sales associates front and center.



TOP 5 Integrated Campaigns



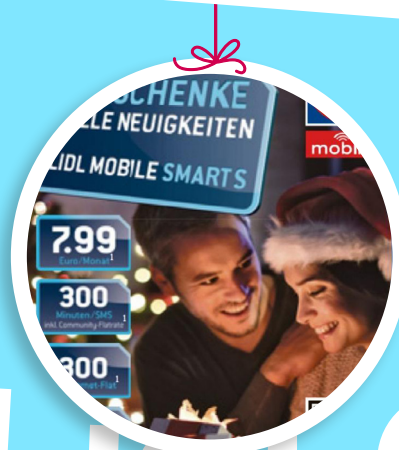
2 Lidl

Lidl extended its £20 million "Lidl Surprises" campaign, launched in September, into its Christmas campaign, running across television, print, cinema and digital to garner the largest customer reach possible.

The TV spot, entitled 'The Little Present', showed local people trying Lidl's food and commenting on the quality of the produce. At the end of the ad, they are surprised when told the food is from.

Lidl. The core message: you don't need to break the bank to have a great festive season.

TOP 5 Integrated Campaigns



Promoted by a Lidl bus...



17

Merry Lidl Christmas

...and behind the scenes...



3 Selfridges

The theme for the 2014 Selfridges Christmas display was inspired by traditional fairy tales, but with a modern twist. There were 23 windows that included a golden goose, 6000 meters of fairy lights and more than 190,000 baubles. Selfridges then spread this idea throughout the store with book motifs appearing on counters, hanging from the ceiling and appearing on in-store treats. The escalators featured torn-out pages of books, with words coming to life and lifting off the pages.



TOP 5

Integrated Campaigns

Destination Christmas

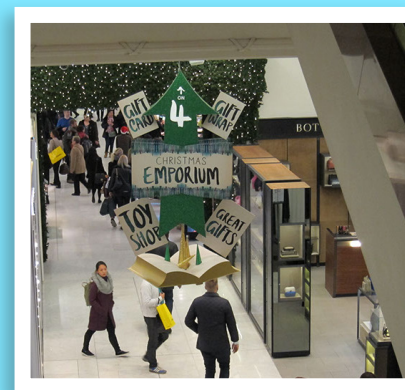


<https://www.youtube.com/watch?v=SvQBMUfalQ>



TOP 5

Integrated Campaigns



Destination

3 Selfridges

The culmination of Selfridges' Christmas campaign was its transformation of their fourth floor into the 'Christmas Emporium'. It was the ultimate Christmas destination, stocking everything you might need for the season, including Christmas trees, light sculptures, cards, ornaments, over 120 different Advent calendars, and over 2,500 children's toys from more than 40 brands, as well as plenty of gifts for pets as well.



S

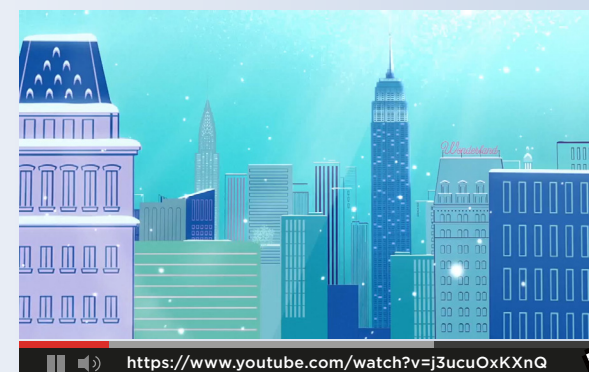
The Tiffany campaign is about everything that shimmers and sparkles, from the trees in Central Park to the bridges on the East River. The TV spot featured glowing Broadway and glimmering steel glass and towers. Tiffany's diamonds and jewels illuminated the bejeweled winter wonderland in the mid-century era reminiscent of Mad Men.

To accompany the TV, billboards and print advertisements were executed with a similar look, featuring larger-than-life jewelry pieces. The sparkle of the campaign was carried through to the exterior of the Tiffany's building, and the Mad Men look-and-feel was executed through the window displays.

"The 2014 windows focus on the energy and sophistication of New York City in the 1950s and 60s," said Richard Moore, Vice President, Creative Visual Merchandising, Tiffany & Co.



TOP 5 Integrated Campaigns



5 Pick n' Pay

In this campaign, Christmas was delivered right to people's front doors. They snapped pictures of Santa's reindeer Tuk Tuks, who was spreading festive treats on the street, and then shared them online with #SantasRide to win fun prizes.

TOP 5

Integrated Campaigns



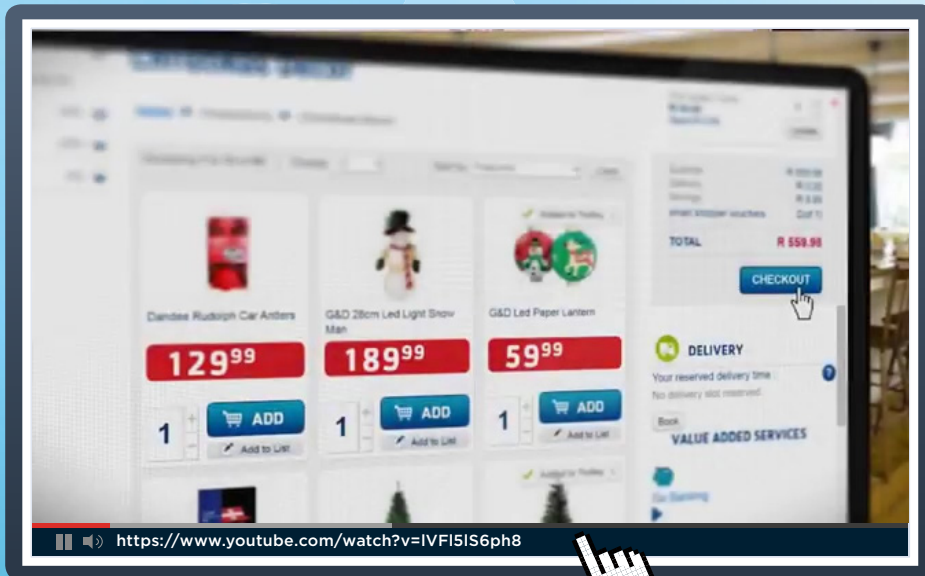
A #SantasRide Spotter...



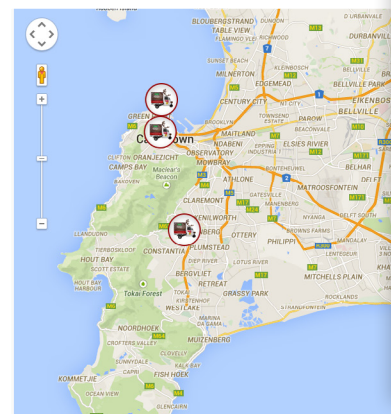
Reindeer TukTuks...



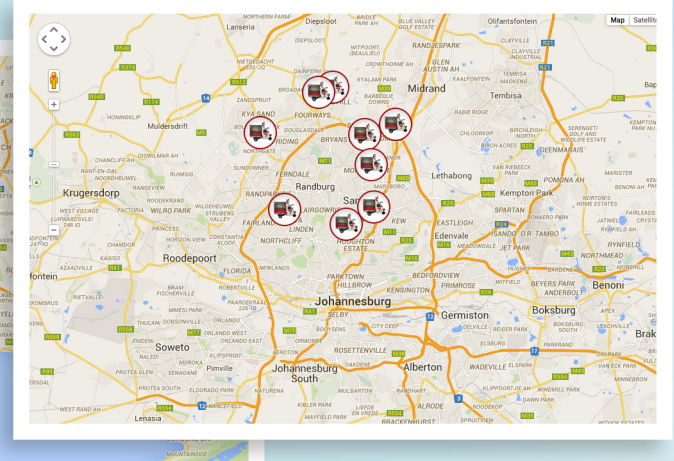
Another #SantasRide Spotter...



Sightings in Cape Town



Sightings in Johannesburg



TOP 5

TV Commercials

22



<https://www.youtube.com/watch?v=dmkwb2KFLW8>

1 Dicks - US

The holiday commercial for Dick's Sporting Goods tied in with their campaign 'Gifts That Matter', featuring a father buying his young daughter a basketball hoop, presumably for Christmas. In the one-minute spot, we witness how the hoop is part of the family's daily life, making this instantly relatable, as we are all given possessions that play important roles throughout our lives. Watch and reminisce about your childhood and those special gifts.



<https://www.youtube.com/watch?v=uuMGR5jMKKs>

2 Coca-Cola - Global

The 2014 Christmas ad for Coca-Cola was created by Coca-Cola Germany with Ogilvy and Mather. This ad was a global campaign with the aim to inspire people everywhere to look beyond the present and 'Make Someone Happy' in small but meaningful ways. Within the ad, you witness acts of generosity. Ultimately, it is all about opening the heart and togetherness. The campaign was rolled out across print, outdoor, retail, radio, social and digital platform using #MakeSomeoneHappy.

TOP 5

TV Commercials



<https://www.youtube.com/watch?v=uhuadZHqwwA>



3 Marks & Spencer - UK

This year's M&S spot had defied all odds by not featuring any celebrities. Instead, it starred two models acting as 'fairies', seen flying across a night sky spreading magic to brighten up Christmas for unsuspecting families to the song 'Fly Me to the Moon'. The retailer confirmed that the social campaign #FollowTheFairies was their largest digital social campaign supported by in-store activity to promote the campaign. @TheTwoFairies had more than 13,000 followers.



<https://www.youtube.com/watch?v=6e253WWgo4o>



5 David Jones - Australia

The David Jones 2014 Christmas campaign 'The Things We Do For Love' was the first time they moved away from a merchandise-driven campaign, focusing instead on the nostalgia of the festive season. The TV spot follows the story of a young boy who is concerned that Santa won't be able to visit because his family doesn't have a chimney. David Jones CEO Iain Nairn said "the campaign successfully brings to life both the old and the new at David Jones, with a message that rings true for all of our customers at Christmas".



<https://www.youtube.com/watch?v=uhuadZHqwwA>



4 Myer - Australia

Australian retail giant Myer revealed its first brand relaunch in almost 10 years with the 'Find Wonderful' campaign, designed to appeal to their contemporary customer segments by being more emotionally engaging. Myer's Chief Merchandise and marketing Officer Daniel Bracken said 'Find Wonderful' is more than an advertising tag line. "It is a way of showing our customers we understand what they are looking for, and sharing our love of shopping and the great moment of joy that comes from finding just what you want."

TOP 5

Window Displays

1 Anthropologie

For the festive holiday this year, Anthropologie's windows were home to all types of birds from around America – also known as the Feathered Friends. Erika L, Anthropologie's display director said, "They are busy little (and big!) birdies, indeed, but you can catch them soaring to and fro in all our windows—along with their fantastically decorated holiday nests—as a reminder that this time of year, coming home is as splendid as it gets."



2 Barneys

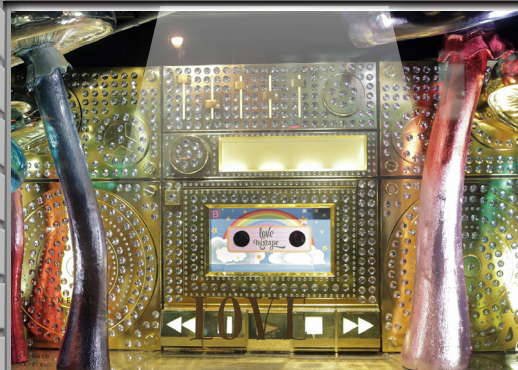
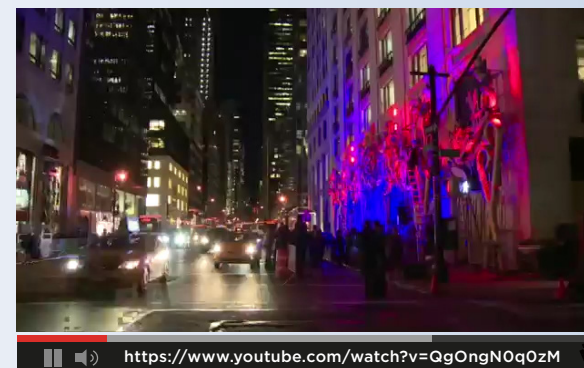
This year, Barneys wanted to show the people of New York something they have never seen before. Their mission was accomplished, thanks to infamous duo Baz Luhrmann and Catherine Martin. The 'Baz Dazzled, Love' displays brought the classic art of storytelling to life through a stunning wonderland of woodland creatures, ice dancers, naughty elves, and larger-than-life sets.



TOP 5

Window Displays

25



TOP 5

Window Displays

3 Bergdorf Goodman

The windows on Fifth Avenue at Bergdorf Goodman truly captured the store's 2014 holiday theme, 'Inspired'. Titled 'The Arts', the windows featured different forms of creativity. The front window, however, was the pièce de résistance, featuring three-dimensional sculptures to create a stunning visual masterpiece.



2 Liberty

The inspiration for Liberty's windows was taken from a direct reference to the store itself: the golden ship that is an iconic feature of the store building and was partially built from two warships, HMS Impregnable and HMS Hindustan. Liberty's message: to invite customers to sail the festive seas and find inspiration for extraordinary gifts within their flagship store.

TOP 5

Window Displays



5 Saks Fifth Avenue

2014 was the year to make the biggest impact possible for everyone attending the Saks Fifth Avenue unveiling. The experience promised to be an experience more grand, more luxurious, and more sensational than New York has ever seen. Saks Fifth Avenue's six animated windows were transformed into scenes from classic fairy tales immaculately rendered in an Art Deco style, with classic New York locations providing the backdrop. The remaining windows featured elegant fashion and holiday attire, all presented in an Art Deco style inspired by the artist Erte.

28

TOP 5

Window Displays



https://www.youtube.com/watch?v=8cT3xsR-Z_A



1 Galeries Lafayette Christmas Tree:

For the first time ever, the Galeries Lafayette 25-metre Christmas tree was turned upside-down and hung from the roof. The festive tree took root overhead in the architectural tracery of the Art Nouveau dome, with a sound-and-light show every hour.



TOP 5
Weird and Wonderful



*Galerias Lafayette Paris
Haussmann
Árbol de Navidad 2014*



<https://www.youtube.com/watch?v=wo3NsJOdhto>



In einem EDEKA Markt vor Weihnachten.

<https://www.youtube.com/watch?v=H965mOHkk5M>

2 EDEKA - Kassensymphonie

Edeka, Germany's largest supermarket corporation, put on a show for some lucky shoppers this past holiday season. With 13 hidden cameras, they captured 9 cashiers playing Jingle Bells with checkout machine beeps. The result may look simple, however, it was insanely difficult to train 9 cashiers to perform the seemingly impromptu checkout concert.

TOP 5
Weird and Wonderful



<https://www.youtube.com/watch?v=b9TTz3R5Sml>



3 Even Santa Poops – Poo-Pourri

The Poo-Pourri brand is known for the witty, confident and playful spirit they bring to everything they do. And their Christmas TV spot didn't fall short. It consists of one poop joke after another. Poo-Pourri's aim was to promote itself as the perfect gift -- and, of course, to create laughs above all else.

TOP 5
Weird and Wonderful

TOP 5

Weird and Wonderful



...and behind the scenes...



4 Freshpet Holiday Feast – 13 Dogs and 1 Cat Eating

The title speaks for itself: '13 Dogs and 1 Cat Eating'. With this ad, Freshpet playfully used the internet's obsession with videos of cute animals to advertise their pet food.



5 Mulberry - #WinChristmas

Offering a lesson in how to win Christmas, Mulberry showed a posh family trying to outdo each with presents for their daughter. Each subsequent present gets more over-the-top, until the canny granny trumps them all. The tongue-in-cheek Christmas campaign shows the brand's modern new direction, with the intent of boosting sales and making 2015 start off with a bang. The #WinChristmas integrated campaign was rolled out across print, Facebook, in-store, VM, social competitions, and a website app featuring a Christmas gift finder.

TAKE A
LOOK
INSIDE...

...for some extra
holiday treats

WINDOWS OF
OXFORD STREET

[http://www.wppwrap.com/
2014/insideoxfordstreet.html](http://www.wppwrap.com/2014/insideoxfordstreet.html)



Bank of America
Winter Village
at Bryant Park

[http://www.wppwrap.com/2014/
insidebryantpark.html](http://www.wppwrap.com/2014/insidebryantpark.html)

bloomingdale's

[http://www.wppwrap.com/2014/
insidebloomingdales.html](http://www.wppwrap.com/2014/insidebloomingdales.html)

John Lewis

[http://www.wppwrap.com/
2014/insidejohnlewis.html](http://www.wppwrap.com/2014/insidejohnlewis.html)



ANTHROPOLOGIE

[http://www.wppwrap.com/2014/
insideanthropologie.html](http://www.wppwrap.com/2014/insideanthropologie.html)

★ macy's

[http://www.wppwrap.com/
2014/insidemacys.html](http://www.wppwrap.com/2014/insidemacys.html)

WINDOWS OF
NEW YORK

[http://www.wppwrap.com/
2014/newyorkwindows.html](http://www.wppwrap.com/2014/newyorkwindows.html)



5 Key Trends

1

Personalized gift options

From Nutella jars with personalized labels to a Nordstrom partnership with customized shoe-maker Shoes of Prey, bespoke was in fashion during the Holidays.

2

Extended shopping

Not just more shopping hours but more shopping days - eg 'Black Friday' extending into 'Gray Thursday'.

3

Free, fast online delivery

'Free' was the magic word for online. 'Fast' was even better. And you couldn't get faster than in-store pick-up. Which is why 'Click & Collect' ruled.

4

Make in-store magic

It was more important than ever to make in-store at Holiday time exciting and engaging. Selfridge's 'Destination Christmas' was a great case in point.

5

Apps as sales tools

For some retailers, apps (like Toys R Us' Wish List app) was the link between online and a sale in store.

RESULTS

Space does not permit us to detail results in every single country. Instead, we've listed the key outcomes for 2014 in the major markets of the UK and USA. If you are presenting a version of Holiday Wrap to your team and clients, we suggest you use these as benchmarks, supported by some local research in your own market. Did your country or region fare better or worse? Were the category winners similar or not?

Keep in mind our observations are just that--observations. And while it's difficult to generalize, the winning retailers all shared well-defined positioning, a genuine 'value' offer, consistent communication, and strong integration of digital. And online was definitely the engine of overall sales growth.

RESULTS

UK...

Overview

1. Online shopping growth through out all the sectors.
2. Flagship stores kept pace with last year's improvements.
3. Black Friday sales improved 6.8% versus last year.
4. IKEA sales in December rose 4.5% but online rose 13.5%
5. JD Sports emerged as a high street winner with a sales rose of 12%
6. Amazon gained most in the Entertainment segment, reaching over 25% of market share

The big winner was Waitrose with their high quality selection and services.

Some of the other winners

**Pretty Green
Boux Avenue
Ted Baker
Fortnum & Mason
IKEA
JD Sports**

And those not so lucky...

**Matalan
Morrisons
Mothercare
WHSmith
M&S**

RESULTS



USA...

Overview

1. Black Friday promotions launched sometimes right after Halloween, was advertised as: "Beat the Black Friday Rush", "Black Friday prices".
2. Consumers avoided Black Friday -, moving their shopping to the previous or following weekend's promotions.
3. JC Penney and Macy's were among the best performing traditional department stores.
4. Target had a moderate growth this holiday, needed after their year ago decline.
5. Consumer electronics and appliance stores posted their strongest holiday growth since 2006.

Some of the
other winners

American Eagle
Best Buy
JC Penney
Macy's
Old Navy
Walgreen

And those
not so lucky...

Abercrombie & Fitch
Gap
Steve Madden

RESULTS

US Holiday Sales Dynamics

Retail Sales Growth: Topline and by Channel

Topline Retail Sales Measures:	4.2%
Total Sales ¹	4.8%
Sales excluding Auto and Fuel	4.3%
Sales excluding Auto, Fuel & Food Service	9.2%
Online & Other Nonstore Retailers²	
Bricks and Mortar Stores³	-0.8%
Department Store Channel⁵	3.4%
Consumables Channels⁴	3.5%
Grocery Stores	6.2%
Drug & Personal Care Stores	2.1%
Supercenters, Warehouse Clubs, Dollar Stores & other Small Format Value Retailers ⁴	3.4%
Apparel & Home Goods Specialists	3.6%
Apparel & Accessory Stores	6.1%
Building & Home Improvement Stores	5.1%
Consumer Electronics & Appliance Stores	3.5%
Furniture & Home Furnishing Stores	4.9%
Sporting Goods, Hobby, Book & Music Stores	

¹ Includes Auto Dealers, Gas Stations, and Food Service

² Other non-store includes catalogs, TV home shopping & fuel dealers

³ Store sales may include a small amount of online sales

⁴ Excludes discount department stores (i.e., mass merch no supercenter)

⁵ Includes traditional & discount department stores (i.e., mass merch no supercenter)

Source: US Department of Commerce
and Kantar Retail analysis

Wrap up

1. Holiday growth improved in most channels
2. Category leaders were technology, high-end fashion, books and health & beauty categories
3. Retailers started to enjoy the benefits of their eCommerce investments...
 - More shoppers are turning to on-line during their path to purchase
 - eCommerce is not a nice to have anymore but essential for continuing growth
4. Click and collect is what shoppers want and they are voting with their wallets
5. Retailers who created extraordinary customer experiences were rewarded with massive foot fall
6. It's all starting MUCH earlier so be prepared!
(or be prepared for competitors to take a growing share of your customers' holiday spend!)

Things

to think about for 2015/2016

- Mobile information gathering and shopping is growing fast...
- Retailers need to create exceptional mobile solutions – both time-efficient and engaging
- Early and late shopping will continue
- Give the consumer a memorable store experience... then help them shop
- Retailers eCommerce **MUST** excel in delivery logistics
- Click and collect is here to stay and will only get bigger, so how do you maximize the impact of consumers coming into store to pick things up?
- What is your compelling reason for consumers to shop out rather than in...?

HOLIDAY 2015/2016 COUNTDOWN

Now you've taken in the best that 2014/2015 has to offer, and before you put your feet up, relax, thinking you've got LOADS of time to think about the Holiday Season 2015/2016 - just remember, **YOU SNOOZE, YOU LOSE!!**

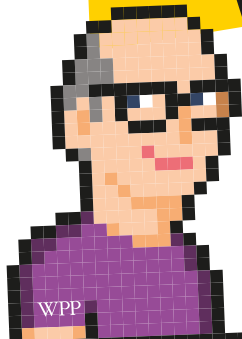
And to keep you on track, here's a handy little reminder of how little time you have...



<http://www.wppwrap.com/windows/holiday-countdown-2015.html>

Don't forget to use the 2013/2014 Holiday Wrap for strategic insights and to stimulate ideas. You can download it from <http://thestorewpp.tv/holidaywrap>

DAVID ROTH IN RETAIL CONVERSATION WITH...



BRYAN ROBERTS

Retail Insights Director, KANTAR **RETAIL** and David Roth, CEO, The Store WPP, EMEA and Asia will be discussing:

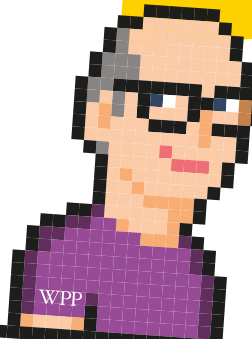
- The Retail Holiday Season - the winners and the losers
- What is the growing impact of Black Friday and Cyber Monday on European retailing?
- What were the key drivers of success?
- What this tells us about the year ahead

<http://youtu.be/Q6iuZ6pkQVw>



If you missed the Retail Holiday editions of "In Retail Conversation With"... you can gain valuable insight by taking a look at the recordings....

DAVID ROTH IN RETAIL CONVERSATION WITH...



NEIL STEWART **Salmon**

SHAPING FUTURE COMMERCE

CEO of Salmon, Europe's leading eCommerce agency (they invented 'Click and Collect') and David Roth CEO, The Store WPP, EMEA and Asia will be discussing:

- The latest trends in eCommerce
- How to maximize the power of "Click and Collect"
- How Bricks and Click are best interconnected
- What we have learned from the holiday period and the implications for 2015
- Ten things every brand needs to know about successful eCommerce

<http://youtu.be/O-oTa4WsaEc>





Thank you very much

To all of you that took the time to get involved and shower us with submissions and observations - WHAT a team!



*holiday*²⁰¹⁴
wrap
THE SEQUEL