



TAKING ON THE MACHINES

The OC&C Retail Proposition Index 2012

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THE OC&C PROPOSITION INDEX 2012

This year marks the third year we have produced the OC&C Proposition Index, a major piece of consumer research measuring shopper perception of the strength of different retail propositions. Consumers are asked to systematically rate retailers they had shopped at on the strength of their overall proposition – and then across different elements of the proposition (such as price, service etc).

The OC&C Proposition Index 2012 is the biggest and most comprehensive we have yet compiled. We surveyed nearly 25,000 different consumers in 8 countries on their perceptions of over 450 retailers. The quarter of a million ratings of individual retailers that this research generates provides an exceptionally strong foundation by which the strength of different retail propositions can be measured.



Rise of the Machines

Once again the OC&C proposition index is headed by Amazon, a retailer that continues to show tremendous strengths across multiple markets and dimensions of the consumer proposition. Amazon has topped the OC&C index in all three years it has been run, and its lead over the rest of the index is now at its most commanding ever.

Amazon's success has been built on consistent and ruthless delivery of a proposition with compelling consumer appeal across a broad set of dimensions. In the consumer's eyes, it delivers greater breadth of range, and presents them with a

choice of products that is suited to them better than any other retailer on the planet. Combined with highly rated service and delivery, this results in a proposition with winning appeal across a broad set of consumer segments and countries. Amazon is, perhaps, the best of a new breed of retail 'machines' – using scale, expert systems and effective deployment of customer data to provide the most efficient retail proposition to customers.

Beyond Amazon and other well established eCommerce players (such as Bol.com), we welcome a number of relatively 'new e-commerce kids' in the form of Allegro and Dawanda – both demonstrating that

competing online is not only the preserve of the behemoth, but also those with a creative and dynamic offering and ambitious plans.

Dawanda, in particular, provides an interesting example of a differentiated proposition. In its role as a marketplace for gifts and unique handmade items, one of its stand-out strengths is the strong sense of community and customer engagement it builds in a 'hobbyist' category.

How the Proposition Index is Measured

The OC&C Proposition Index is compiled by surveying nearly 25,000 consumers across 8 different countries (UK, Germany, France, Netherlands, USA, India, Poland and China).

Respondents were asked to rate a random selection of 10 retailers that they had shopped at (ie, visited or purchased) in the last 3 months on the overall strength of their proposition – and on individual elements (such as low prices, quality of products, service etc). Questions were based on a 5 star rating system (from 1=poor to 5=excellent) which was then converted into the simple 0-100 score shown in the index. The scores have been normalised between countries for international comparison.

The sample sizes collated for each retailer means that ratings are accurate to within +/- 1.5 – and that differences greater than this are statistically significant.

AMAZON RANKING BY COUNTRY AND PROPOSITION DIMENSION

Criteria / Country	Germany	USA	France	UK
Low Prices	6	6	2	7
Quality of Products	1	10	3	4
Wide Choice of Products	1	1	1	1
Products Suited to Me	1	1	1	1
Service	1	6	1	1
Store / Website Look & Feel	1	6	3	1
Value For Money	1	1	1	2
Trust	1	2	1	2
Overall Rating	1	1	1	1

OC&C PROPOSITION INDEX - TOP 20 RETAILERS

Rank	Company	Category	Country	Score ¹	Chg ²
1	Amazon	Gen Merch	DE, UK, FR, US, CN, NL	92.0	-0.8
2	DM	Health & Beauty	DE	87.3	2.4
3	Picard	Grocery	FR	87.1	1.5
4	Allegro	Gen Merch	PL	86.7	-
5	John Lewis	Department Stores	UK	86.1	2.6
6	IKEA	Furniture	PL, NL, UK, FR, US	85.7	-
7	Rossmann	Health & Beauty	PL, DE	85.0	-
8	Thalia	Entertainment	DE	84.2	1.5
9	Bol.com	Entertainment	NL	83.9	0.4
10	Dawanda	Other	DE	83.3	10.3
11	M&S	Apparel	UK, IN	83.2	3.0
12	M&S Simply Food	Grocery	UK	83.0	-0.1
13	Flipkart.com	Gen Merch	IN	82.8	-
14	Leboncoin	Gen Merch	FR	82.7	-
15	Card Factory	Stationers	UK	82.6	5.1
16	L'Occitane	Health & Beauty	FR	82.3	5.3
17	Globus	Grocery	DE	82.3	0.2
18	The Raymond Shop	Apparel	IN	82.1	-
19	Empik	Entertainment	PL	82.1	-
20	Yves Rocher	Health & Beauty	FR	81.8	1.4

Diversity of Winning Models

While online players continue to expand the appeal of their consumer proposition, a look down other retailers in the top 20 demonstrates the vibrant retail landscape that we currently operate in. Online pureplays still only account for 20 out of the Top 100 in the index (although this is up from 14 last year) - and other leading consumer propositions can be found across a broad range of sectors, countries and business models.

There are the international retail juggernauts, leveraging international scale and a consistent customer proposition across a broad set of territories. Ikea is the best rated of these, with Inditex, Douglas and H&M following a similar path.

But there are also a number of strong local champions who have built a huge consumer franchise in their home markets. DM, Picard and John Lewis are the most notable examples - playing off strong quality perceptions or compelling stores for shoppers. Delivering customer engagement, service, theatre and excitement is a consistent theme as to how these players fight back and differentiate against the machines and the juggernauts.

TOP 5 MULTICHANNEL RETAILERS

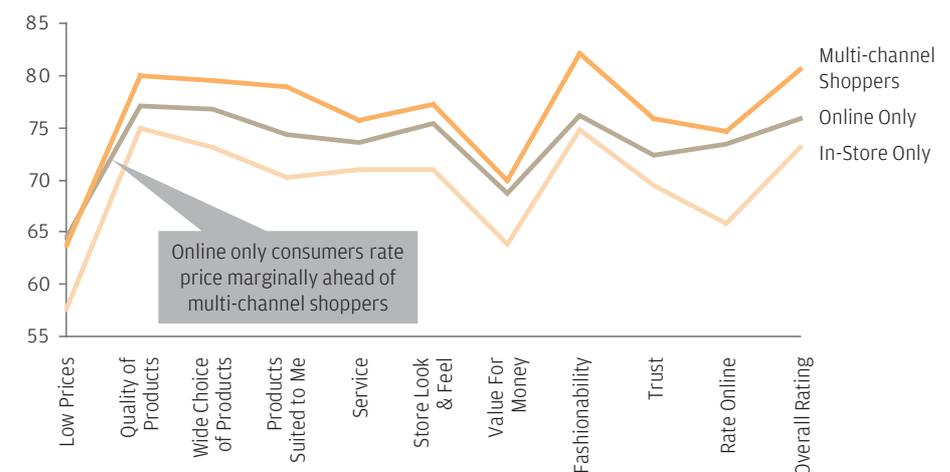
Company	Category
1 Thalia	Entertainment
2 John Lewis	Department Stores
3 Esprit	Apparel
4 Zara	Apparel
5 Ernstings Family	Apparel

Using Multi-channel to Fight Back

While the pureplay retailers are making tremendous progress in the index, stores are providing a critical asset to the more multichannel retailers. Consumers who experience a retailers' offer across multiple channels typically rate propositions better across nearly every dimension than those shopping solely in store or online. This is

CUSTOMER RATING BY CHANNEL SHOPPERS

Average Consumer Ratings of Multi-channel Retailers by Shopper Channel
Score Out of 100



consistent with the experience of most retailers, who find that their multichannel customers typically spend more and are far more loyal.

From a consumer perspective it is the clothing and department store sectors where many of the best examples of multichannel proposition delivery are to be found (with

John Lewis, Esprit, Zara and Ernstings Family some of the highest rated proposition for consumers shopping across multiple channels). These players use stores as assets to improve the service offering, deliver theatre and convenience to consumers providing good examples of how to decisively take on the online pureplay challenge.

¹ 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
² Change indicates delta in overall proposition rating 2011-12



Staying in Fashion

Looking over time, we see some long term changes underway in the fashion landscape. In previous years, the big vertically integrated young fashion players, like H&M and Zara, had been the proposition stars in the apparel space - providing a winning combination of both cheap prices and fashionable product, supported by rapid response supply chains and purchasing scale.

But the rising stars in the fashion space now are the curators and aggregators.

Asos, Zolando and Zappos have been rapidly rising up the index over the last few years - with their online model allowing them to offer winning collections of both third party and owned brands. Interestingly, the attribute that stands out most for shoppers is not an ever expanding breadth of range, but the curation of a fashionable collection. The rise of Office, the UK multi-brand footwear retailer operating out of high street stores provides an effective illustration that this trend is not just limited to online pureplays where ranges are unconstrained.

In fact, this highlights something that nearly all of the proposition champions at the top end of our index have in common - their ability to systematically deliver against the dimensions that involve the presentation and curation of a compelling range. This isn't just about the relentless expansion of range however - the best of these retailers are not just offering choice, but appropriate / relevant choice. And it is this that is enabling small box retailers (such as Picard, L'Occitane or Trader Joes) to deliver on this dimension as well as big box and online players.

COUNTRY PROPOSITION LEADERS

GERMANY



Rank Retailer

- 1 Amazon
- 2 DM
- 3 Thalia
- 4 Dawanda
- 5 Globus

UK



Rank Retailer

- 1 Amazon
- 2 John Lewis
- 3 M&S
- 4 M&S Simply Food
- 5 Card Factory

FRANCE



Rank Retailer

- 1 Amazon
- 2 Picard
- 3 Leboncoin
- 4 L'Occitane
- 5 Yves Rocher

NETHERLANDS



Rank Retailer

- 1 Bol.com
- 2 IKEA
- 3 Hornbach
- 4 Albert Heijn
- 5 Amazon

US



Rank Retailer

- 1 Amazon
- 2 Trader Joes
- 3 Costco
- 4 Zappos
- 5 iTunes

POLAND



Rank Retailer

- 1 Allegro
- 2 IKEA
- 3 Rossmann
- 4 Empik
- 5 Biedronka (JMD)

INDIA



Rank Retailer

- 1 Adidas
- 2 Flipkart.com
- 3 The Raymond Shop
- 4 Reebok
- 5 Nike

CHINA



Rank Retailer

- 1 Nike
- 2 RT Mart
- 3 Adidas
- 4 T-Mall
- 5 Li Ning

CATEGORY PROPOSITION CHAMPIONS

GROCERY



GENERAL MERCHANDISE



APPAREL



HEALTH & BEAUTY



ELECTRICALS



FURNITURE



SPORTS & OUTDOORS



DIY



Discount Marches Onwards

Discount retailers have made significant strides in improving their consumer appeal, with customer ratings of their proposition improving significantly ahead of that of other retailer propositions. The march of the discounters is seen across many countries with both long established players (such as Aldi and Lidl) and rapidly expanding formats (such as Home Bargains and B&M Bargains) gaining in appeal.

The growing importance of the propositions at a time of economic hardship and austerity

in Europe in particular may come as no surprise. But it is interesting that the growing appeal of these propositions is driven not by further improving price and value perception - but by closing the proposition gap on service and store standards enabling their appeal to cross into new consumer segments.

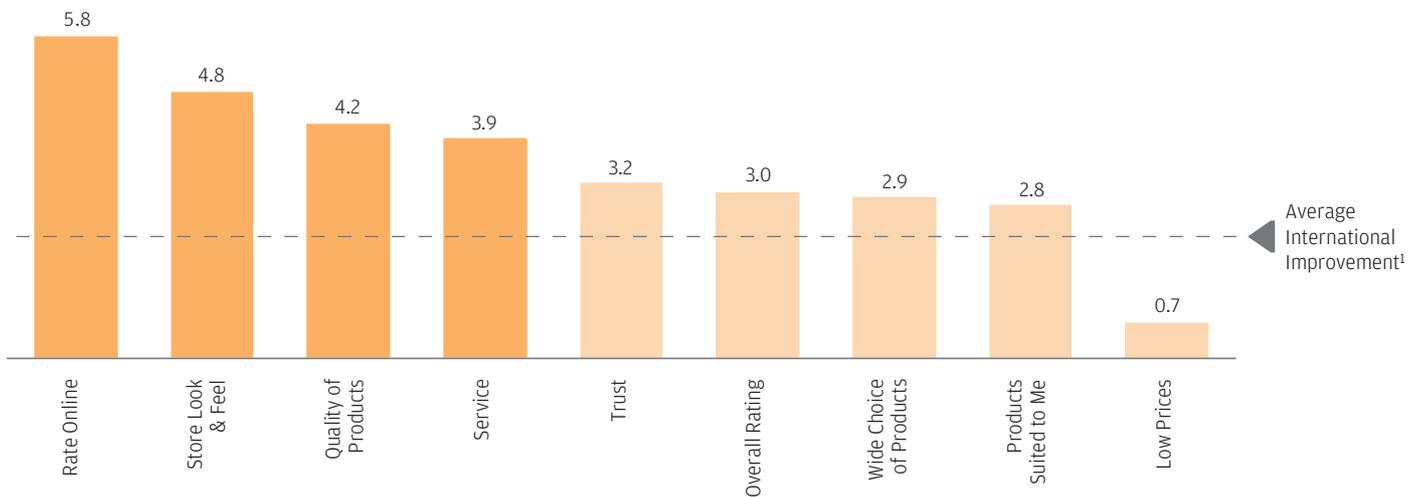
For some existing mainstream retailers this will create an increasing challenge on delivering a sufficiently strong value proposition that minimises defection or basket disaggregation of more price sensitive customers.

Change in Overall Proposition Rating 2011-12 Delta



International Discounters - 2011-12 Change in Overall Proposition Rating

Change in Score Out of 100



Taking Retail Propositions International Remains a Challenge

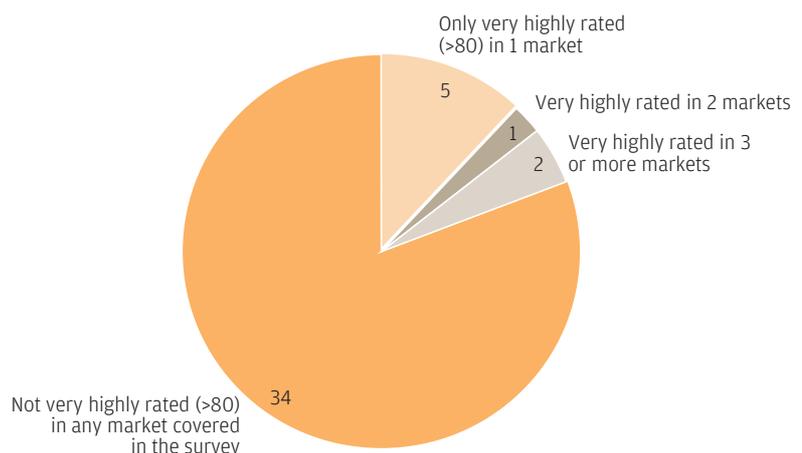
The Proposition Index covers over 40 retailers with sufficient breadth and depth of international operations for us to be able to assess consumer perceptions of their proposition strength in multiple countries. Many of these propositions score relatively consistently across different countries - highlighting their ability to deliver a proposition with a reasonable consumer appeal internationally.

However, what is striking, is while many of these propositions are rated reasonably well, there are very few that are rated very strongly in many countries simultaneously. Taking overall ratings above 80 as the mark of excellence, there are only two retailers (Amazon and Ikea) that are able to achieve that in each of more than two countries. Yet there are 39 'local' players able to achieve a rating of 80 or higher in one country.

For retailers, it highlights how tough it is to deliver excellence (not just good) in international expansion, and how important local proposition adaption is unless you are lucky enough to have one of the few propositions with genuine mass universal appeal.

Excelling Internationally

How 42 International Retailers are Rated Across Territories



CONSUMER PROPOSITION CHAMPIONS

LOW PRICES



Rank	Retailer	Shopper Rating
1	Card Factory	90.3
2	Primark	90.2
3	Poundland	89.2
4	99p Store	89.1
5	Action	88.1
6	Dollar Tree	86.9
7	Home Bargains	86.6
8	Aldi	86.0
9	Amazon	85.0
10	Lidl	84.6

VALUE FOR MONEY



Rank	Retailer	Shopper Rating
1	Card Factory	88.5
2	Amazon	87.9
3	Primark	84.2
4	Home Bargains	84.1
5	Allegro	84.0
6	Aldi	83.7
7	Poundland	83.3
8	99p Store	83.3
9	Lidl	82.2
10	DM	82.2

TRUST



Rank	Retailer	Shopper Rating
1	Amazon	87.9
2	John Lewis	85.0
3	Picard	84.6
4	DM	83.9
5	Rossmann	83.3
6	M&S Simply Food	82.7
7	Thalia	81.7
8	Zappos	81.6
9	Waitrose	81.5
10	M&S	81.2

SERVICE



Rank	Retailer	Shopper Rating
1	Amazon	88.0
2	Thalia	84.9
3	John Lewis	84.6
4	Douglas	84.2
5	Trader Joes	83.7
6	Zappos	82.4
7	Waitrose	82.2
8	Expert	82.2
9	Bath and Body Works	81.8
10	Apple Store	81.8

PRODUCT QUALITY



Rank	Retailer	Shopper Rating
1	Picard	89.0
2	M&S Simply Food	87.1
3	John Lewis	87.0
4	Amazon	86.8
5	Waitrose	86.4
6	DM	86.3
7	Apple Store	85.5
8	Douglas	85.5
9	Thalia	85.0
10	Williams-Sonoma	84.4

WIDE CHOICE OF PRODUCTS



Rank	Retailer	Shopper Rating
1	Amazon	95.0
2	eBay	91.8
3	Allegro	91.1
4	Taobao	88.0
5	Globus	87.9
6	Dawanda	87.5
7	Bol.com	87.2
8	Kaufland	86.4
9	Douglas	86.3
10	Real	86.2

STORE / WEBSITE LOOK AND FEEL



Rank	Retailer	Shopper Rating
1	Amazon	92.1
2	Allegro	90.2
3	Nature et Découvertes	86.2
4	Douglas	86.0
5	John Lewis	85.5
6	Thalia	85.3
7	DM	84.7
8	Flipkart.com	84.4
9	Bol.com	84.4
10	eBay	83.9

FASHIONABILITY



Rank	Retailer	Shopper Rating
1	Asos	88.3
2	Zalando	86.9
3	Zara	85.8
4	Office	83.3
5	Esprit	83.2
6	Galleries Lafayette	83.2
7	Top Shop	82.8
8	Zappos	81.2
9	H&M	81.1
10	River Island	81.0

THE OC&C PROPOSITION INDEX 2012 – THE T

RATING OF OVERALL RETAIL PROPOSITION BY CONSUMERS VISITING OR PURC

Rank	Company	Category	Country	Score ¹	Chg ²	Rank	Company	Category	Country	Score ¹	Chg ²
1	Amazon	Gen Merch	DE, UK, FR, US, CN, NL	92.0	-0.8	51	Levi's	Apparel	IN	79.7	-
2	DM	Health & Beauty	DE	87.3	2.4	52	Droguerie Müller	Health & Beauty	DE	79.6	1.7
3	Picard	Grocery	FR	87.1	1.5	53	Asos	Apparel	UK	79.5	3.8
4	Allegro	Gen Merch	PL	86.7	-	54	H&M	Apparel	PL,DE, UK, FR, NL, CN, US	79.5	-
5	John Lewis	Department Stores	UK	86.1	2.6	55	Richer Sounds	Electricals	UK	79.5	1.9
6	IKEA	Furniture	PL, NL, UK, FR, US	85.7	-	56	Sam's Club	Club	US	79.5	2.2
7	Rossmann	Health & Beauty	PL, DE	85.0	-	57	Hornbach	DIY	NL, DE	79.4	5.0
8	Thalia	Entertainment	DE	84.2	1.5	58	Kaufland	Grocery	DE	79.4	-0.4
9	Bol.com	Entertainment	NL	83.9	0.4	59	Reserved	Apparel	PL	79.3	-
10	Dawanda	Other	DE	83.3	10.3	60	RT Mart	Grocery	CN	79.2	3.9
11	M&S	Apparel	UK, IN	83.2	3.0	61	Nordstrom	Department Stores	US	79.2	2.7
12	M&S Simply Food	Grocery	UK	83.0	-0.1	62	Club des créateurs de Beauté	Health & Beauty	FR	79.2	4.3
13	Flipkart.com	Gen Merch	IN	82.8	-	63	T-Mall	Other	CN	79.1	-
14	Leboncoin	Gen Merch	FR	82.7	-	64	Zalando	Apparel	DE, NL, FR	79.1	5.1
15	Card Factory	Stationers	UK	82.6	5.1	65	Big Bazaar	Grocery	IN	79.0	-
16	L'Occitane	Health & Beauty	FR	82.3	5.3	66	Bath and Body Works	Health & Beauty	US	78.8	1.0
17	Globus	Grocery	DE	82.3	0.2	67	P&C	Apparel	DE	78.7	1.2
18	The Raymond Shop	Apparel	IN	82.1	-	68	Marionnaud	Health & Beauty	FR	78.7	2.2
19	Empik	Entertainment	PL	82.1	-	69	Whole Foods	Grocery	US	78.6	-
20	Yves Rocher	Health & Beauty	FR	81.8	1.4	70	Li Ning	Apparel	CN	78.5	2.3
21	Tchibo	Department Stores	DE	81.8	0.0	71	360buy	Other	CN	78.4	3.2
22	Specsavers	Optical	UK	81.7	-	72	Albert Heijn	Grocery	NL	78.4	0.0
23	Nature et Découvertes	Department Stores	FR	81.7	0.9	73	C&A	Apparel	DE, PL, FR, NL, CN	78.4	1.2
24	Apple Store	Electricals	FR, US	81.7	-	74	Super-Pharm	Health & Beauty	PL	78.3	-
25	Trader Joes	Grocery	US	81.7	-	75	Croma	Electricals	IN	78.3	-
26	Ebay	Gen Merch	UK, DE, IN, FR, US, PL	81.5	-1.3	76	Clarks	Apparel	UK	78.3	-2.6
27	Sephora	Health & Beauty	FR, PL, US, CN	81.4	-0.4	77	Leroy Merlin	DIY	FR, PL	78.3	4.0
28	Biedronka (JMD)	Grocery	PL	81.4	-	78	Aldi	Grocery	DE, UK, US, NL	78.3	0.3
29	Reebok	Apparel	IN	81.2	-	79	Maisons du Monde	Household	FR	78.2	0.0
30	FNAC	Electricals	FR	81.2	0.3	80	Galleries Lafayette	Department Stores	FR	78.2	3.4
31	Waitrose	Grocery	UK	81.0	-0.4	81	Espace Culturel Leclerc	Entertainment	FR	78.2	1.8
32	Vente-privée	Apparel	FR	81.0	-1.7	82	Iceland	Grocery	UK	78.2	4.3
33	Play.com	Entertainment	UK	80.8	-2.3	83	Williams-Sonoma	Household	US	78.2	4.4
34	Wilkinson	Gen Merch	UK	80.8	1.5	84	Depot	Other	DE	78.1	-
35	Costco	Club	US	80.7	-0.7	85	Asda	Grocery	UK	78.0	0.7
36	Notebooksbilliger	Electricals	DE	80.6	7.3	86	Walmart	Grocery	CN	78.0	5.1
37	Zappos	Apparel	US	80.6	-	87	Toys R Us	Other	UK	77.9	4.2
38	Argos	Gen Merch	UK	80.5	2.2	88	Bonprix	Apparel	DE, FR	77.8	1.5
39	Cultura	Entertainment	FR	80.5	2.5	89	Barnes & Noble	Entertainment	US	77.8	0.2
40	Bata	Apparel	IN	80.5	-	90	Alma Market	Grocery	PL	77.8	-
41	Greggs	Other	UK	80.4	4.1	91	Pets at Home	Other	UK	77.8	2.4
42	Decathlon	Sports & Outdoors	FR	80.3	-0.4	92	Hema	Department Stores	NL	77.8	1.3
43	Douglas	Health & Beauty	DE, PL, NL, FR	80.3	-1.9	93	Merlin	Gen Merch	PL	77.7	-
44	Home Bargains	Discount	UK	80.1	3.7	94	Castorama	DIY	PL, FR	77.7	-
45	Dunelm Mill	Gen Merch	UK	80.1	4.7	95	Expert	Electricals	NL, DE	77.6	-
46	Selfridges	Department Stores	UK	80.0	-1.1	96	Ocado	Grocery	UK	77.6	0.9
47	Boots	Health & Beauty	UK	80.0	2.0	97	Ernstings Family	Apparel	DE	77.6	-
48	Esprit	Apparel	DE, NL, CN, IN	79.9	-2.4	98	Watsons	Health & Beauty	CN	77.6	3.8
49	Otto	Department Stores	DE	79.8	-0.5	99	Omoda	Apparel	NL	77.5	-
50	iTunes	Entertainment	FR, US	79.8	1.5	100	Lifestyle	Department Stores	IN	77.5	-

¹ 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

² Change indicates delta in overall proposition rating 2011-12

TOP 400 RETAILERS

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

Rank	Company	Category	Country	Score ¹	Chg ²	Rank	Company	Category	Country	Score ¹	Chg ²
101	Belle	Apparel	CN	77.4	5.4	151	Blokker	Household	NL	76.0	3.1
102	BJs Wholesale	Club	US	77.4	-	152	Holland & Barrett	Health & Beauty	UK	75.9	3.9
103	Deichmann	Apparel	DE, PL	77.4	0.4	153	Suning	Electricals	CN	75.9	3.3
104	Taobao	Other	CN	77.4	1.4	154	Nocibé	Health & Beauty	FR	75.8	0.7
105	B&M Bargains	Discount	UK	77.3	5.0	155	Pepe Jeans	Apparel	IN	75.8	-
106	M&M Direct	Apparel	UK	77.3	4.3	156	dangdang	Other	CN	75.8	3.7
107	Saks Fifth Avenue	Department Stores	US	77.3	5.5	157	Piotr i Paweł	Grocery	PL	75.8	-
108	Shoppers Stop	Department Stores	IN	77.2	-	158	Louis Philippe	Apparel	IN	75.7	-
109	Zara	Apparel	DE, PL, FR, UK, NL, US, CN, IN	77.2	-1.7	159	newegg	Electricals	US	75.7	-
110	Conrad Elektronik	Electricals	DE	77.2	-1.9	160	Van Haren	Apparel	NL	75.6	6.5
111	Leclerc	Grocery	FR, PL	77.1	2.3	161	Metersbonwe	Apparel	CN	75.6	3.1
112	Krys	Optical	FR	77.1	-3.5	162	Camaieu	Apparel	FR	75.6	0.0
113	Auchan	Grocery	FR, PL	77.1	5.1	163	Peter England	Apparel	IN	75.6	-
114	Ebuyer	Electricals	UK	77.0	1.4	164	Rewe	Grocery	DE	75.6	3.2
115	Jumbo	Grocery	NL	76.9	-0.5	165	The Sting	Apparel	NL	75.6	-0.6
116	Alain Afflelou	Optical	FR	76.8	4.9	166	Tommy Hilfiger	Apparel	IN	75.5	-
117	Wehkamp	Apparel	NL	76.8	0.4	167	Metro	Grocery	DE	75.5	0.8
118	Bauhaus	DIY	DE	76.8	2.0	168	Etam	Apparel	FR, CN	75.5	3.2
119	Darty	Electricals	FR	76.7	1.5	169	Aeropostale	Apparel	US	75.4	-
120	Tesco	Grocery	CN, UK, PL	76.7	8.2	170	La Redoute	Apparel	FR	75.4	3.3
121	Lowe's	DIY	US	76.7	0.0	171	Etos	Health & Beauty	NL	75.3	1.4
122	Target	Gen Merch	US	76.7	-0.1	172	Van Heusen	Apparel	IN	75.3	-
123	Morrison	Grocery	UK	76.7	1.1	173	Westside	Department Stores	IN	75.3	-
124	Generale d'Optique	Optical	FR	76.6	2.0	174	homeshop18.com	Gen Merch	IN	75.2	-
125	Kohl's	Department Stores	US	76.6	0.5	175	Trust Mart	Grocery	CN	75.2	8.6
126	Price Minister	Gen Merch	FR	76.6	-	176	Sainsbury's	Grocery	UK	75.2	1.5
127	Pantaloons	Department Stores	IN	76.6	-	177	Optic 2000	Optical	FR	75.2	-0.1
128	Yihaodian	Grocery	CN	76.6	-	178	Kaufhof	Department Stores	DE	75.2	-0.7
129	Debenhams	Department Stores	UK	76.5	-1.1	179	OBI	DIY	DE, PL	75.2	-0.9
130	Prenatal	Department Stores	NL	76.5	7.0	180	House of Fraser	Department Stores	UK	75.2	-0.7
131	Kroger	Grocery	US	76.5	-	181	GAP	Apparel	CN, US, UK	75.1	5.9
132	Ted Baker	Apparel	UK	76.5	3.1	182	The Home Depot	DIY	US	75.1	1.0
133	Neiman Marcus	Department Stores	US	76.4	-	183	SOLiver	Apparel	DE	75.0	-3.9
134	99p store	Discount	UK	76.4	6.0	184	De Slegte	Entertainment	NL	75.0	-
135	Miss Etam	Apparel	NL	76.3	-0.4	185	Charles Vögele	Apparel	DE	75.0	-
136	Crate and Barrel	Household	US	76.3	11.9	186	MediaMarkt	Electricals	PL, DE, NL, CN	75.0	-
137	Bijenkorf	Department Stores	NL	76.2	-2.8	187	Black Red White	Furniture	PL	75.0	-
138	Gome	Electricals	CN	76.2	7.1	188	Lloyds Pharmacy	Health & Beauty	UK	74.9	1.7
139	Only	Apparel	CN	76.2	-	189	O2	Other	DE	74.9	-
140	Printemps	Department Stores	FR	76.2	5.6	190	Office	Apparel	UK	74.9	-
141	Action	Household	NL	76.2	0.8	191	Orlen	Service Station	PL	74.8	-
142	Cdiscount	Gen Merch	FR	76.2	-1.2	192	Max Bahr	DIY	DE	74.8	3.6
143	Edeka	Grocery	DE	76.2	1.4	193	Landmark	Entertainment	IN	74.8	-
144	ChainReactionCycles.com (CRC)	Sports & Outdoors	UK	76.2	-	194	Système U	Grocery	FR	74.8	2.1
145	Lidl	Grocery	NL, DE, UK, PL, FR	76.0	1.8	195	DirkBasDigros	Grocery	NL	74.7	-0.1
146	Poundland	Discount	UK	76.0	2.2	196	Snapdeal.com	Gen Merch	IN	74.6	-
147	WE	Apparel	NL	76.0	-	197	Saturn	Electricals	DE, PL, NL	74.6	-0.7
148	Next	Apparel	UK, IN	76.0	0.5	198	JC Penney	Department Stores	US	74.6	0.6
149	Butlers	Other	DE	76.0	-	199	Bed Bath and Beyond	Household	US	74.6	1.9
150	Crossword	Entertainment	IN	76.0	-	200	Real	Grocery	DE, PL	74.6	-0.1

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THE OC&C PROPOSITION INDEX 2012 – THE T

RATING OF OVERALL RETAIL PROPOSITION BY CONSUMERS VISITING OR PURC

Rank	Company	Category	Country	Score ¹	Chg ²	Rank	Company	Category	Country	Score ¹	Chg ²
201	Abercrombie & Fitch	Apparel	US	74.5	4.8	251	Spencers	Grocery	IN	73.3	-
202	GameStop	Entertainment	US	74.5	-1.4	252	Wal-Mart	Gen Merch	US	73.3	3.2
203	Boulanger	Electricals	FR	74.5	3.6	253	HMV	Entertainment	UK	73.3	0.4
204	Primark	Apparel	UK, DE	74.4	0.5	254	Intersport	Sports & Outdoors	FR	73.2	2.1
205	Monsoon	Apparel	UK	74.4	1.0	255	Strauss Innovation	Department Stores	DE	73.2	-0.8
206	Matalan	Apparel	UK	74.4	0.4	256	River Island	Apparel	UK	73.2	2.4
207	Jack and Jones	Apparel	CN, IN	74.4	4.0	257	Mannings	Health & Beauty	CN	73.2	4.1
208	Asos De	Apparel	DE	74.3	4.6	258	Alinea	Household	FR	73.2	-0.5
209	Benetton	Apparel	IN	74.3	-	259	361°	Apparel	CN	73.1	-
210	Kruidvat	Health & Beauty	NL	74.3	0.0	260	Praxis	DIY	NL	73.1	2.9
211	Dollar Tree	Discount	US	74.2	3.6	261	B&Q	DIY	UK	73.1	1.6
212	Macy's	Department Stores	US	74.2	1.5	262	Zodiac	Apparel	IN	73.1	-
213	New Look	Apparel	UK	74.2	0.8	263	Ross Stores	Department Stores	US	73.0	-
214	Praktiker	DIY	PL, DE	74.1	-	264	Boots Opticians	Optical	UK	73.0	-
215	Intermarche	Grocery	PL, FR	74.0	-	265	Walgreens	Health & Beauty	US	73.0	-0.6
216	DA	Health & Beauty	NL	74.0	0.5	266	Carrefour	Grocery	CN, FR, PL	73.0	7.0
217	Superdrug	Health & Beauty	UK	74.0	1.5	267	RTV Euro AGD	Electricals	PL	73.0	-
218	BCC	Electricals	NL	74.0	2.7	268	Superdry	Apparel	UK	73.0	2.7
219	Dillard's	Department Stores	US	74.0	-	269	Karwei	DIY	NL	73.0	2.3
220	Xenos	Household	NL	74.0	2.0	270	Redcoon	Electricals	DE	73.0	0.4
221	Hobbycraft	Other	UK	73.9	0.5	271	Very	Gen Merch	UK	72.9	5.7
222	Arrow	Apparel	IN	73.9	-	272	Les 3 Suisses	Apparel	FR	72.9	4.5
223	Bruna	Entertainment	NL	73.9	0.1	273	Mappin & Webb	Jewellery	UK	72.8	17.2
224	M&S Mode	Apparel	NL	73.9	0.8	274	Kolporter	Stationers	PL	72.8	-
225	Rueducommerce	Gen Merch	FR	73.8	-	275	Intertoys	Entertainment	NL	72.8	0.3
226	Virgin	Entertainment	FR	73.8	-	276	Courtepaille	Food Service	FR	72.7	-
227	Breuninger	Department Stores	DE	73.8	-0.9	277	Toom - Der Baumarkt	DIY	DE	72.7	-
228	Majestic Wine	Other	UK	73.8	5.6	278	Neckermann	Apparel	NL	72.7	0.2
229	Sports Direct	Sports & Outdoors	UK	73.8	0.1	279	Vision Express	Optical	UK	72.6	-
230	Vancl	Apparel	CN	73.8	0.3	280	Robert Dyas	DIY	UK	72.6	2.9
231	Marshalls	Department Stores	US	73.7	-	281	Bloomingdale's	Department Stores	US	72.5	0.5
232	Uniqlo	Apparel	CN	73.7	1.5	282	Forever 21	Apparel	US	72.5	-
233	BP Polska	Service Station	PL	73.7	-	283	New Yorker	Apparel	DE	72.5	-1.5
234	Telekom	Other	DE	73.7	-	284	Boden	Apparel	UK	72.4	8.1
235	Kiabi	Apparel	FR	73.7	2.7	285	Semir	Apparel	CN	72.4	3.5
236	Maplin	Electricals	UK	73.6	3.5	286	Bart Smit	Entertainment	NL	72.4	-1.4
237	Burlington Coat Factory	Apparel	US	73.6	-	287	Brico Dépôt	DIY	FR	72.4	2.9
238	Reliance Fresh & Reliance Mart	Grocery	IN	73.6	-	288	Cache Cache	Apparel	FR	72.3	3.6
239	WuMart	Grocery	CN	73.6	5.8	289	Easy Day	Grocery	IN	72.3	-
240	Görtz	Apparel	DE	73.5	-1.5	290	Nilgiris	Grocery	IN	72.3	-
241	Daphne	Apparel	CN	73.5	3.3	291	Pottery Barn	Household	US	72.3	-0.5
242	Vanguard	Grocery	CN	73.5	6.9	292	TK Maxx	Apparel	US, UK, DE	72.3	-
243	Gamma	DIY	NL	73.5	0.6	293	Pixmania	Electricals	FR	72.3	0.8
244	Star Bazaar	Grocery	IN	73.5	-	294	Wills Lifestyle	Apparel	IN	72.2	-
245	Mothercare	Other	UK	73.4	-2.4	295	Wickes	DIY	UK	72.2	3.3
246	Base / Eplus	Other	DE	73.4	-	296	Goldsmiths	Jewellery	UK	72.1	4.9
247	Wiggle.co.uk	Sports & Outdoors	UK	73.4	-	297	Best Buy	Electricals	US	72.1	-2.9
248	Staples	Stationers	US	73.4	0.3	298	Shell	Service Station	PL	72.1	-
249	Lotus	Grocery	CN	73.4	7.7	299	Republic	Apparel	UK	72.1	0.9
250	Kappa	Apparel	CN	73.4	-	300	Famila	Grocery	DE	72.0	-2.6

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TOP 400 RETAILERS

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

Rank	Company	Category	Country	Score ¹	Chg ²	Rank	Company	Category	Country	Score ¹	Chg ²
301	Phones 4 U	Electricals	UK	72.0	8.5	351	Giordano	Apparel	CN	70.7	3.6
302	Billiger	Electricals	DE	72.0	2.7	352	Womai	Grocery	CN	70.6	-
303	Johnsons Dry Cleaners	Other	UK	72.0	-	353	Spartoo	Apparel	FR	70.6	-
304	American Eagle Outfitters	Apparel	US	72.0	-	354	Dorothy Perkins	Apparel	UK	70.5	1.9
305	Dolland & Atchison	Optical	UK	72.0	-	355	Gemo	Apparel	FR	70.5	3.9
306	Five Star	Electricals	CN	71.9	2.8	356	Reno	Apparel	DE	70.5	2.5
307	Karstadt	Department Stores	DE	71.9	2.7	357	The Mobile Store	Electricals	IN	70.5	-
308	Bonita	Apparel	DE	71.9	-	358	Vodafone	Other	DE	70.4	-
309	H. Samuel	Jewellery	UK	71.9	6.7	359	Baleno	Apparel	CN	70.4	3.5
310	Office Depot	Stationers	US	71.9	-	360	Sarenza	Apparel	FR	70.4	-
311	Monoprix	Grocery	FR	71.9	3.9	361	Subway	Food Service	FR	70.4	-
312	Carphone Warehouse	Electricals	UK	71.8	5.7	362	White Stuff	Apparel	UK	70.3	3.8
313	Adler	Apparel	DE	71.8	-	363	Poundstretcher	Discount	UK	70.3	-0.6
314	Moonbasa	Apparel	CN	71.7	-	364	Gamestation	Entertainment	UK	70.3	0.6
315	Fat face	Apparel	UK	71.7	3.9	365	Leen Bakker	Furniture	NL	70.2	1.2
316	Reliance Digital	Electricals	IN	71.7	-	366	Mirapodo	Apparel	DE	70.2	3.7
317	Save-A-Lot	Grocery	US	71.7	-	367	Atol	Optical	FR	70.2	6.8
318	C1000	Grocery	NL	71.7	0.8	368	Century Mart	Grocery	CN	70.2	5.7
319	Ernest Jones	Jewellery	UK	71.7	4.3	369	futurebazaar.com	Gen Merch	IN	70.2	-
320	TopShop	Apparel	UK	71.6	2.6	370	Plus	Grocery	NL	70.2	0.7
321	Buffalo Grill	Food Service	FR	71.6	-	371	Big Lots	Discount	US	70.1	-
322	Jack Wills	Apparel	UK	71.6	1.6	372	Dixons	Electricals	NL, UK	70.1	3.9
323	Home Center	Household	IN	71.6	-	373	Euronics	Electricals	DE	70.1	-1.3
324	Safeway	Grocery	US	71.6	-	374	Homebase	DIY	UK	70.1	3.3
325	Edinburgh Woollen Mill	Apparel	UK	71.6	-	375	WH Smith	Stationers	UK	70.1	1.3
326	CVS	Health & Beauty	US	71.5	0.9	376	Blacks	Sports & Outdoors	UK	70.1	1.1
327	Body Shop	Health & Beauty	US	71.5	3.3	377	Original Factory Store	Discount	UK	70.0	7.0
328	Conforama	Household	FR	71.5	2.6	378	Timpson's	Other	UK	70.0	-
329	Formido	DIY	NL	71.5	4.4	379	Cora	Grocery	FR	70.0	2.7
330	Old Navy	Apparel	US	71.5	-0.7	380	Sears	Department Stores	US	70.0	-0.1
331	Hagebau	DIY	DE	71.5	0.9	381	Game	Entertainment	UK	70.0	-3.4
332	Odyssey	Entertainment	IN	71.4	-	382	Lianhua	Grocery	CN	70.0	6.4
333	Brand4Friends	Apparel	DE	71.4	0.0	383	Polo Market	Grocery	PL	69.8	-
334	Halfords	Other	UK	71.4	5.7	384	Banana Republic	Apparel	US	69.8	-2.7
335	Promod	Apparel	FR	71.3	1.5	385	Kaiser's	Grocery	DE	69.6	-
336	Kijkshop	Household	NL	71.3	4.9	386	La Halle	Apparel	FR	69.6	2.0
337	Verò Moda	Apparel	CN, NL	71.3	2.4	387	Furniture Village	Furniture	UK	69.6	16.2
338	JD Sports	Sports & Outdoors	UK	71.2	4.6	388	Rite-Aid	Health & Beauty	US	69.5	1.9
339	@Home	Household	IN	71.1	-	389	Family Dollar	Discount	US	69.5	0.1
340	Marskramer	Household	NL	71.1	4.0	390	Currys	Electricals	UK	69.5	3.9
341	Jcrew	Apparel	US	71.1	5.4	391	Optical Centre	Optical	FR	69.5	-0.6
342	Orsay	Apparel	DE	71.0	-	392	Go Sport	Sports & Outdoors	FR	69.4	1.3
343	Planet M	Entertainment	IN	70.9	-	393	Trekpleister	Health & Beauty	NL	69.4	1.9
344	Medimax	Electricals	DE	70.9	5.3	394	Ruch	Stationers	PL	69.4	-
345	Jessops	Electricals	UK	70.9	0.1	395	Ako	Entertainment	NL	69.4	-
346	V&D	Department Stores	NL	70.9	0.1	396	Komfort	Furniture	PL	69.3	-
347	Me&City	Apparel	CN	70.9	-	397	NKD	Apparel	DE	69.3	2.6
348	Agata Meble	Furniture	PL	70.8	-	398	Dreams	Furniture	UK	69.2	5.4
349	Brioche Dorée	Food Service	FR	70.8	-	399	MORE	Grocery	IN	69.0	-
350	Electronic Partner	Electricals	DE	70.7	2.0	400	Meble VOX	Furniture	PL	69.0	-

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