

RETAIL REPORT 2019

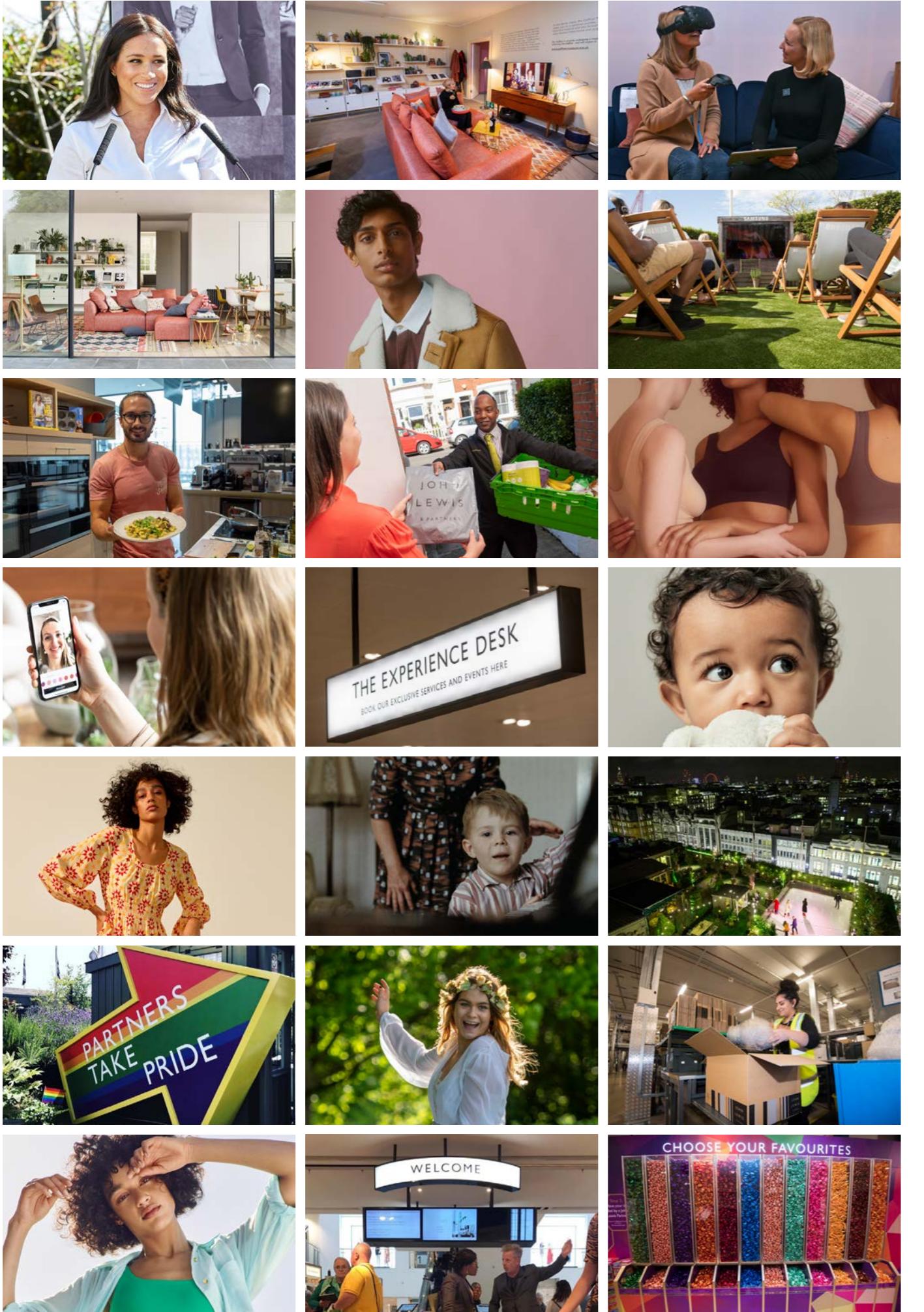
HOW WE SHOP, LIVE AND LOOK



JOHN LEWIS
& PARTNERS

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INTRODUCTION



SIMON COBLE

Partner and Trading Director

With the retail sector going through a period of generational change, never has there been a time so crucial for brands to showcase their identity. Retailers are embracing their strengths and what differentiates them to stay relevant in today's climate. At John Lewis & Partners, we have spent the last twelve months reimagining and redesigning how experiences can push the boundaries of how we shop and the products on offer.

Against a backdrop of instability and uncertainty, retailers have to work even harder to maintain customer trust and loyalty. This means adapting to the times to remain relevant to customers' lives.

We believe in the future of shops. A physical shopping destination creates human connections and builds trust, particularly at John Lewis & Partners, where our Partners, with specialist expertise and training, offer specialist advice and personalised support. A growing range of services are at the heart of our transformation, designed to meet the individual needs of customers and embrace the fun of shopping. Offering the ability to delight customers with immersive experiences and make their purchases more meaningful is where bricks triumph over clicks.

As a destination for customers during key life moments and big decisions, understanding how the nation shops, lives and looks remains at the top of our agenda. This year's report, our seventh edition, explores how JOMO (the Joy of Missing Out) is revamping our living space, why 2019 was the year of oversized dresses, longer lengths and looser-fitting styles and, of course, what items we left behind.

Looking back over the year, it would be wrong not to mention the nation's growing concern for environmental challenges. Glastonbury made the decision to ban single-use plastic bottles for the first time this year. Our own data paints a picture of shoppers becoming increasingly mindful about the purchases they make. Our response is to offer investment pieces at affordable prices that customers will treasure for the long-term and this year we have made significant progress in sourcing the most sustainable materials and ethical brands across our range.

Read on to discover more about the transformations taking place in the nation's homes, wardrobes and lives.

TIMELINE OF THE YEAR



The ongoing political uncertainty dominated the year's news agenda. However, this was not the only big news of the year. Climate change activism and record-breaking temperatures brought environmentalism onto the mainstream agenda and the nation declared war on single-use plastic, with many making some small but significant changes in their lifestyles and routines.

OCTOBER

2018

#SALADBOWLGATE

A John Lewis salad bowl, which had been a wedding present, containing sweets for trick or treaters was taken from the owner's doorstep on Halloween. After her plea for its return went viral, John Lewis & Partners sent a new one to the victim of #saladbowlgate.



NOVEMBER

2018

PARTNERS FIRST TO ENJOY ELTON CHRISTMAS AD

The singer's life story featured in this year's John Lewis & Partners Christmas ad. The ad was shared over 5,000 times by Partners, before officially airing on TV screens, trending on Twitter within 16 minutes.



DECEMBER

2018

GATWICK DRONE SHUTDOWN

We stopped selling drones soon after, following a significant sales dip after hundreds of flights were cancelled at Gatwick Airport.



JANUARY

2019

THE GREAT BRITISH TIDY UP

Tidying up became the new detoxing in January, with organisation expert Marie Kondo's show hitting our TV screens. Storage box sales soared by 47% and clothing hooks were up 36% for the month.



FEBRUARY

2019

RECORD-BREAKING VALENTINE'S DAY

Customers were not shy in showing their appreciation for loved ones this year and we saw record sales. Confectionery sales were 80% higher than the previous week and alcohol gift sales bubbled up by 40%.

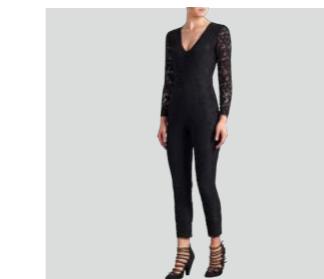


MARCH

2019

THE FLEABAG EFFECT

As the second series of cult TV series Fleabag hit our screens, customers mirrored the look of its anti-hero by styling black jumpsuits with red lipstick. Our best seller was the Somerset Black Lace Jumpsuit.



APRIL

2019

EASTER HEATWAVE

It was the hottest Easter Monday on record and the nation couldn't wait to roll up their sleeves and get into the garden. Lawnmowers were a cut above other purchases, reaching a 76% increase that weekend, while overall sales of gardening equipment were up 12%.



MAY

2019

BIRTH OF PRINCE ARCHIE

John Lewis reveals parents are investing in the latest gadgets to help their little ones to sleep from the Whisbear E-zzy Sloth Monitor to the Bluebell Smart Monitoring system.



JUNE

2019

WOMEN'S WORLD CUP

This year's FIFA Women's World Cup drew one billion viewers for the first time. The sporting event saw customers browsing on their phones during the ad breaks and sales of sports headbands were up 76%.



JULY

2019

HOTTEST DAY ON RECORD

On 25th July the UK experienced temperatures of over 38°C, the hottest day ever recorded. Measures to keep cool saw customers investing in fans (+120%), sprinklers (+59%), paddling pools (+42%) and baby pools (+96%).



AUGUST

2019

THE RETURN OF PEAKY BLINDERS

The new series of Peaky Blinders aired in August, leading sales of flat caps to reach their peak this month (+25%).



EVENTS THAT SHAPED THE YEAR



RETURN OF GLASTONBURY

The world's largest greenfield music and performing arts festival returned to the Vale of Avalon and, for the first time, the event banned single-use plastic. A surprise appearance from David Attenborough at Glastonbury 2019 upped its eco credentials. Many festival-goers brought reusable bottles and we saw sales increase 15% the week before the festival. The weekend of the event was sunny and mild, so there was no need for the advanced purchases of new wellies, parkas or umbrellas, which grew 25%, 99% and 721% respectively ahead of the festival.

Street style was the look of choice for many standout acts, including Billie Eilish, Miley Cyrus, Rosalía, Octavian and, of course, Stormzy, who made history as the first British rapper to headline. Their presence had a knock-on effect with sales of jumpsuits, vests and statement "bling" jumping over the summer.

REUSABLE WATER BOTTLES

15% ▲



WOMEN'S WIDE BRIM HATS 325% ▲

MEN'S WHITE T-SHIRTS 12% ▲

JLP COSTUME EARRINGS 62% ▲

MEN'S TRACK JACKETS 73% ▲



WAR ON PLASTIC

This year the Government announced a forthcoming ban on sales of plastic straws, cotton buds and drink stirrers in England. More mindful than ever of the damage plastic does to the environment, customers chose to cut down on their plastic use. Travel mugs, reusable water bottles and lunch boxes are now everyday essentials. A growing range of brands are innovating with new materials and designs so staying eco-friendly while eating your leftovers is not a problem. Within the last year, we've launched collapsible coffee cups, reusable travel cutlery and reusable beeswax sandwich wrappers.

One water bottle might not be enough and customers are purchasing a range of sizes and styles for their gym bags, commutes, desks and handbags.

PORTABLE CUTLERY

176% ▲



50 YEARS OF PRIDE

Colourful parades across the country marked the fiftieth anniversary of Pride. Our Oxford Street shop joined the celebrations, with a takeover by Britain's Got Talent's Sheila Simmonds, complete with comedy songs and Pride favourites on its roof garden. Complementary festival-inspired makeovers, bespoke cocktails, DJ sets and drag acts completed the festivities.

Fashion embraced the rainbow of colours symbolic to the movement and we saw strong sales of bright clothing in early summer. In menswear, a tangerine orange polo shirt was one of our best sellers and a canary yellow waterproof also proved a hit. Women opted for colourful culottes in shades of bright green, cobalt blue and orange.



A YEAR OF CULT TV

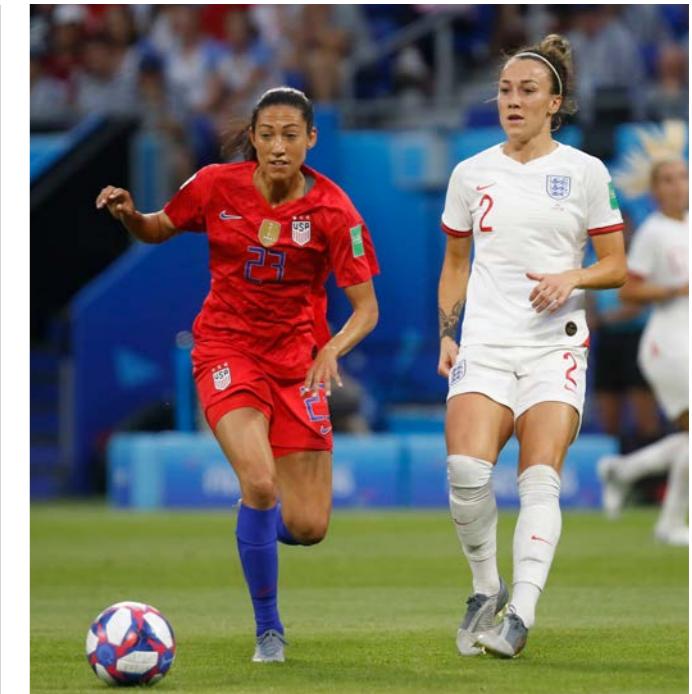
This year, the nation embraced "JOMO" - the Joy of Missing Out (see page 19). The quality and quantity of TV fuelled viewers' desires to stay home, as gripping dramas and compelling characters left them glued to their sofas. The influence of these shows spread beyond the water cooler and into customers' wardrobes.

BLACK JUMPSUIT
Fleabag **66%** ▲

FLAT CAPS
Peaky Blinders **25%** ▲



SLIM FIT LEVI'S
Stranger Things **8%** ▲



WOMEN'S WORLD CUP 2019

The FIFA Women's World Cup brought women's football into the spotlight, with over a billion viewers for the first time. As the Lionesses reached their second consecutive semi-final, women across the country were inspired to get active, with sales of sports bras and headbands on the rise. Visits from smartphones to our website during the ad break of the semi-finals increased by 4.5%, with searches for womenswear and accessories accounting for 39% of total views.



HEADBAND SALES
(compared to June 2018) **76%** ▲

FOOTBALL GOALS **3%** ▲

WHAT WE LOVED IN 2019

PRINTED DRESSES

20.4% ▲



LINEN BEDDING

187% ▲



THE SPF MOISTURISER

26% ▲



BOTANICAL PLANTS

43% ▲



Customers continue to bring mindfulness into the home with botanical house plants blooming in popularity when it comes to reconnecting to nature.

LUXE LOUNGEWEAR

129% ▲



PREMIUM LEGO

24.9% ▲



THE WIDE-LEG CULOTTES

51% ▲



This year's trend for wide-leg culottes fits in with the loose-fitting, longer lengths that dominated womenswear this year. Versatile and practical, Kate Middleton encapsulated their casual chic look, when she teamed hers with white pumps at this year's Chelsea Flower Show.

THE REUSABLE STRAW

1573% ▲



With a forthcoming ban on the sale of plastic straws, customers are embracing the change and opting for eco-friendly, stainless steel reusable straws.

THE SMART DOORBELL

51% ▲



Increasingly, customers want the ability to receive instant alerts when someone rings the doorbell and speak to visitors from their smartphones. We grew our home monitoring range by 20% this year, as clever new solutions entered the market to help customers keep an eye on their homes, wherever they are.

THE CONTEMPORARY HAIR STYLER

15,000



The Dyson Airwrap applies jets of air to style hair into curls, waves and blow dries without the need for extreme heat, leaving customers increasingly confident styling their hair at home. Since its launch last October, it has captivated customers and was a must-have gift for Christmas 2018 with over 15,000 sold.

WHAT WE LEFT BEHIND IN 2019



CLUTCH BAGS

61% ▼



Once a must-have for fashionistas, the clutch has proved less popular this year. We removed them from our own brand womenswear accessories range.

CAMCORDERS

33% ▼



Camcorders are practically a non-existent market as smartphones take over. However, with the growing trend for vlogging, high-end digital cameras, which boast features such as "selfie mode" and 4k streaming, are on the rise.

LANDLINES

20% ▼



The nation is hanging up on these former household necessities, with sales down 45% since 2014. Now, customers prefer to be reached via their smartphones, on email or through online video calls.

DRONES

100% ▼

Following the disruptions at London airports in December 2018, we took the decision to stop selling drones in May 2019.

MANTEL CLOCKS

30% ▼



Formerly centre pieces of the room, customers have banished mantel clocks to the archives, with people increasingly relying on their smartphones, smart watches and voice controlled speakers to keep track of the time.

COCKTAIL SHAKERS

20% ▼



While home bars are big news this year, the tantalising range of tonics and mixers available is shaking up the cocktail market. As a result, sales of cocktail shakers are taking a tumble.

FISH KETTLES

100% ▼



With informal dinner parties on the rise, gone are the days when it was the norm to poach a whole fish to wow your guests and due to declining demand, we decided to stop selling fish kettles this year.

SUSPENDERS

8% ▼



Customers are no longer willing to endure uncomfortable underwear in the name of sex appeal with suspenders down 8% compared with last year.

HOW WE SHOPPED

By expanding our range of personal services, we're bringing the intimacy, luxury and magic of personal shopping to the high street, helping customers rediscover the fun of a trip to the shops. Offering the ability to delight them with immersive experiences, VIP treatment and personalised advice helps make their purchases feel more meaningful. This is one area where bricks truly triumph over clicks. A physical shop space also brings opportunities for a sense of belonging, bringing them together in times of extreme change, connecting them to friends, family and even pets through memorable, shared experiences. That's why we've opened the doors to our customers' canine friends for the first time...

FIVE 'RED-CARPET' SERVICES AVAILABLE TO CUSTOMERS

Whether customers are looking for a "power outfit" for work, an ideal colour scheme for a bedroom refit or an Insta-perfect makeover, our Partners have been specially trained to support them on every step of their journey. Innovative "Experience desks" offer a concierge service to help customers curate and book appointments for everything from blow-dries to kitchen consultations. Slick integration with digital channels takes the hassle out of the transactional element of these new services. For instance, customers can quickly and easily book an appointment with a stylist or consultant, add to their wishlist or discover exclusive events via the My John Lewis app while "clienteling" technology allows customers to maintain a one to one personal relationship with a Partner for ongoing advice or "SOS" shopping missions.

13 Experience Desks in John Lewis & Partners shops

29 Style Studios available in John Lewis & Partners Shops

1

PERSONAL STYLING

Introduced last year, Style Studios connect customers with our team of Personal Stylists to inspire customers and give them an extra boost of confidence when it comes to wardrobe updates. Whether it's finding the perfect jeans to preparing an ultra-stylish holiday suitcase. VIP services, including Style and Beauty packages and Personal Styling Parties, are also on offer, alongside workshops and talks on how to master the latest trends.

Testament to the positive response to our recent innovations in women's personal styling, we have introduced a number of expert men's personal Style Advisors in four John Lewis & Partners Shops including White City, Stratford, Southampton and Oxford Street to explore how our male customers shop for new looks. Informal, "walk and talk" appointments have proved particularly popular, where our expert Partners are on hand to walk the floor with the customer and provide impartial styling advice, free of charge.

2

THE BEAUTY STUDIO

The beauty hall can feel like an overwhelming place for those customers who are not familiar with the brands and products on display. At The Beauty Studio* in our shops, customers can play and experiment with our full range of cosmetics, skincare products and fragrances in an unbranded hub. Beauty Guides are on-hand for impartial advice on their individual needs.

* The Beauty Studio will be relaunched as The Beauty Society in October 2019.



3

BRINGING VR INTO THE HOME

Three of our shops in Kingston, Cambridge and Horsham are now trialling a virtual reality experience for home furnishings called 'Visualise Your Space'. Customers can input their room dimensions and the positioning of doors and windows into an iPad app, and then drop in John Lewis products to see how their interior ideas would look in their homes.



4

THE WORLD OF DESIGN

As customers increasingly use Instagram and Pinterest to create dream visions of their homes, it is important that they can think "project", not "product" when visiting our shops. This is the vision for our new World of Design. These creative, service-led destinations within our shops pull together all the elements needed to build a perfect interior look, such as paint, wallpaper, fabrics and flooring. Customers can browse at their leisure, drop-in for instant interiors advice or book a session with a Home Design stylist for projects of any scale. The first World of Design will open in Peterborough.

* The first World of Design will open in John Lewis & Partners Peterborough in October 2019

5

AFTER HOURS SHOPPING

In October 2018, John Lewis & Partners Cheltenham launched after-hours shopping with our first ever Private Shopping service. For a minimum spend of £10,000 customers can book out the whole shop, with an expert team of John Lewis Partners on hand to create the ultimate bespoke shopping experience.

WOMEN'S PERSONAL STYLING IN NUMBERS

39% ▲

Increase in personal styling sales

25,366

The number of appointments so far this year

£383

The average spend per appointment (both booked and spontaneous)

MEN'S PERSONAL STYLING IN NUMBERS

80%

of appointments were less than 30 minutes

82%

of sales came through "walk & talk" appointments

A SHOPPING EXPERIENCE BUILT FOR BUSY LIVES

For everyday purchases, customers expect shopping to be hassle free, convenient and quick. We're continuing to invest in our online capabilities to improve our delivery infrastructure and IT systems to create effortless transactions.

THREE MOST SEARCHED FOR PRODUCTS



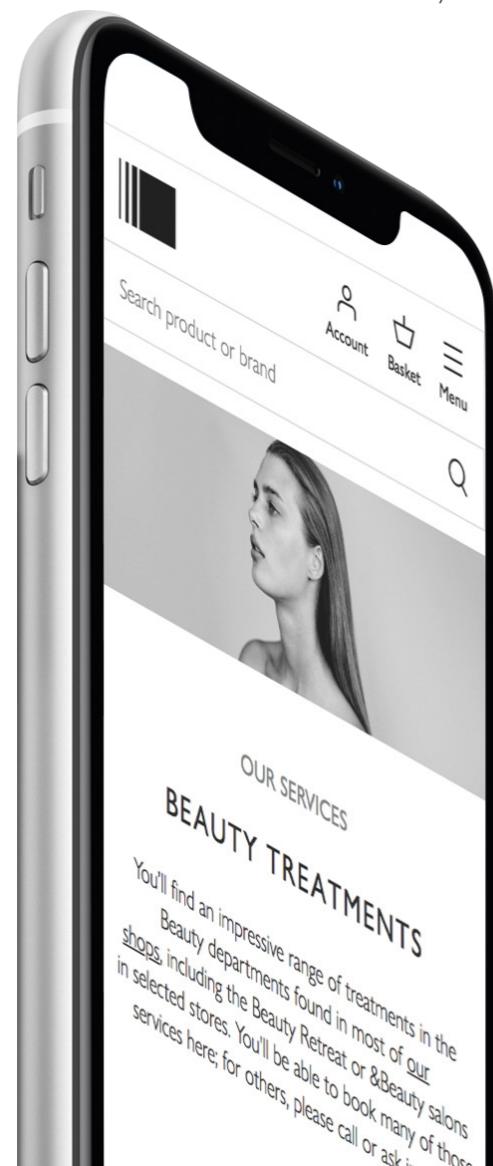
BABY ESSENTIALS



MAKE UP



LAUNDRY BASKET



54%

Site visits come from mobiles – an increase of 12% compared to last year

54,548

Over 54,548 pieces of content shared by 741 Partners in the past 12 months, earning 1.77m pieces of engagement and 450m impression

57% ▲

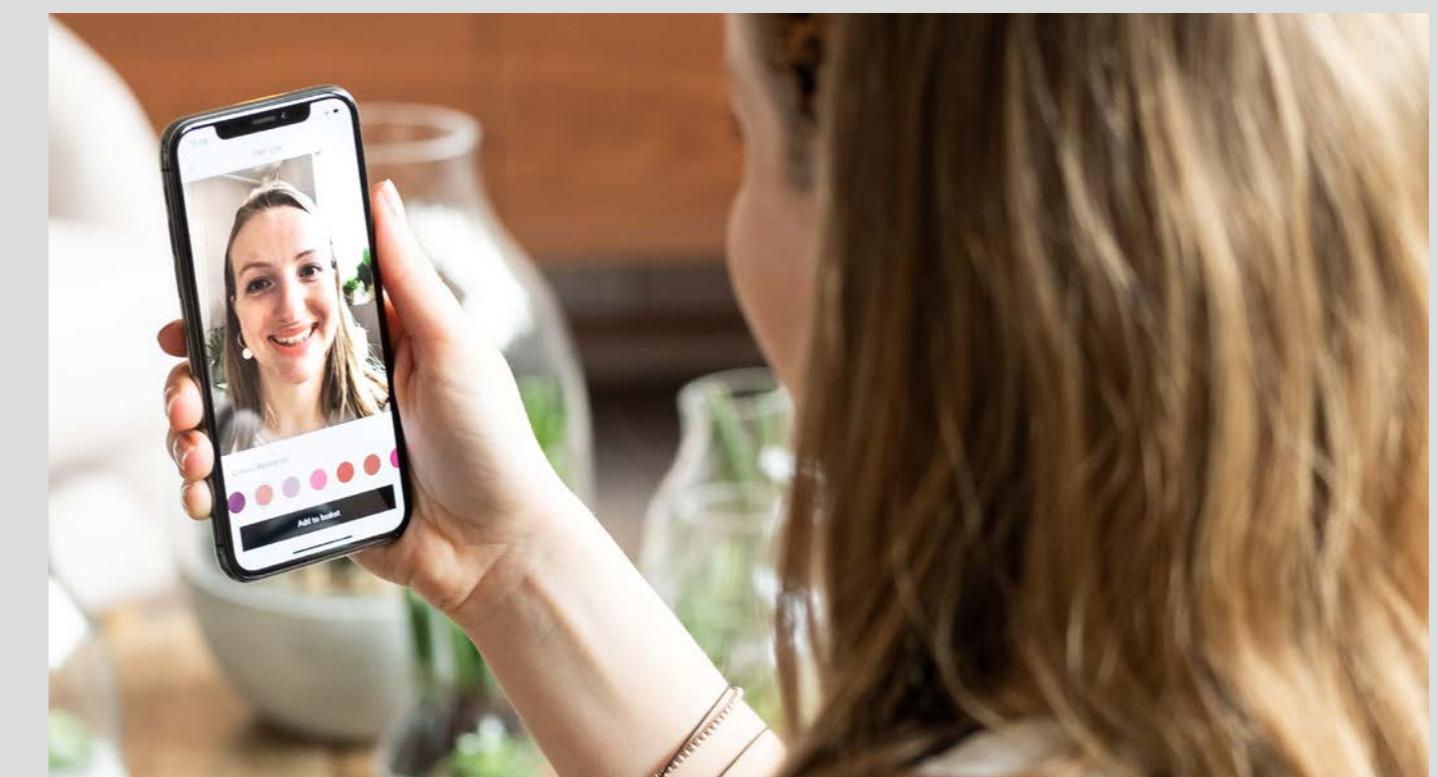
of online orders use Click & Collect for fast and convenient pickup

Expanding delivery options to suit busy lifestyles is an ongoing priority at John Lewis. This year, we introduced Click & Collect from Co-op food stores and a returns service via Waitrose delivery vans, so when unloading your groceries you can multitask by sending back unwanted John Lewis orders.

With smartphone shopping continuing to rise, customers use micro-windows of time, such as a bus ride or coffee break, for fast and easy transactions. Proof of this, everyday items such as makeup, laundry baskets and baby essentials are among the most viewed products on mobile.

Enhancing our search capabilities is also a top priority in creating an ever-faster, simpler shopping experience for customers. Increasingly, search is the primary way to navigate the website so it must bring exactly the right results to the top of the list, every time.

In the past 12 months we have introduced vegan and sustainability search filters in response to customer demand.



THE DIGITAL TEAM BEHIND THE SCENES AT JOHN LEWIS & PARTNERS

THE PARTNERS BEHIND THE STORY



"The Virtual Lipstick Experience combined the expertise of our Beauty Hall Partners with the very best in Augmented Reality technology. The app gave a real "wow moment" to customers and really helps customers make the right lipstick choice that suits them. Many customers don't like trying on lipsticks in shops for hygiene reasons. Based on its positive reception, we're now exploring more complex Augmented Reality services to help customers visualise furniture items in their own space."

SIENNE VEIT

Partner & Director of Digital

With the incredible advances in digital technology over the last few years, our focus is on using technology's possibilities for creating fun, playful and genuinely useful experiences. Behind the scenes, teams of search pros, data analysts, app developers, Virtual Reality experts and social media specialists push the boundaries of retail.

For instance, the Virtual Lipstick Experience enabled customers to "try on" different shades using their selfie camera on their phones. Beauty lovers had fun with the technology, sharing their "lipstick selfies" with friends to help them decide on a new look from a choice of over 300 lipsticks.

And when it comes to seeking inspiration from social media, the path from finding a desirable item to being able to "shop the look" must be hassle-free. At John Lewis, the process has been enhanced with the launch of #WeArePartners which encourages Partner interaction on social channels, with in-house stylists and expert consultants building their own followings and engaging directly with customers.

Over 741 active partners taking part in #WeArePartners programme

741 ▲

Increase in App downloads in the first week after Virtual Lipstick Experience launched

50% ▲

On average, customers tried up to six different lipsticks through the experience.

6

HOW WE LIVED

Reinventing living spaces is no longer about quick fixes to “brighten up a room”. Instead, customers have upscaled their ambitions for home projects of all sizes. Whether their aim is to create a home cinema, a picture perfect nursery or an outdoor paradise, they take their interior updates seriously, carefully planning and thoughtfully styling each room.



JOMO REPLACES FOMO

This has been the year of JOMO (the Joy of Missing Out), as customers opt to stay in and create memorable experiences at home with friends and family. Here are a few of the most popular ways customers are enjoying missing out this year:

COCKTAIL NIGHTS

The growing popularity of artisan, boutique spirits and infused tonics have made it possible to emulate the kind of cocktails that mixologists would be proud of. Consequently, we are witnessing the return of the home bar, with drink trolleys up 136% and drinks cabinets and decanters back in vogue. Champagne stoppers are also a best-seller; telling of the nation's penchant for fizz.



DRINK TROLLEY SALES

136% ▲

SPIRIT MEASURER SALES

33% ▲



INDULGENT HOME SALON TREATMENTS

Inspired by “how to” videos on YouTube and Instagram, beauty fans are experimenting with new looks and enjoy turning their living spaces into home salons for a spot of pampering, with beauty products proving to be one of the leading causes for John Lewis home insurance claims for customers’ carpets and sofas this year. The Dyson Airwrap was one of our best selling Christmas presents, as customers look to recreate salon-standard blow-drys.





SEASONAL CELEBRATIONS

Just because they are enjoying more nights in, doesn't mean customers are being less social. Increasingly, national holidays and traditions serve as the perfect excuse to throw a party. We are seeing customers pulling out all of the stops for Halloween and Easter, with trees, wreaths, wall hangings and table decorations continuing to prove popular.

HALLOWEEN LIGHT-UP
TREE AND WREATHS

40%[▲]

HANGING DECORATIONS
FOR EASTER TREES

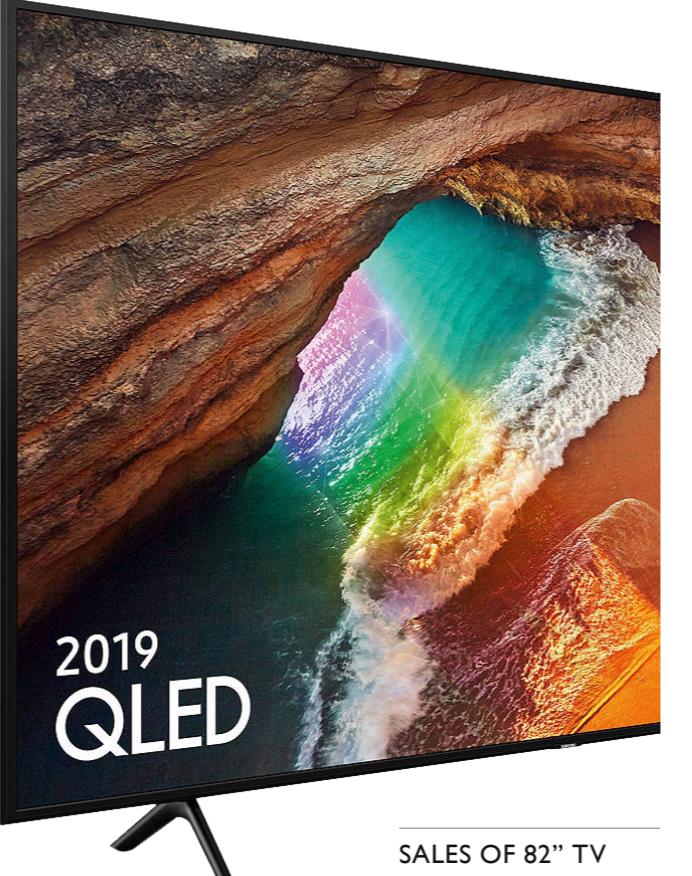
32%[▲]

HOME CINEMA EXPERIENCES

Friends and families gathering together on the sofa to enjoy their favourite films is nothing new. And yet, with sales of supersized 8K screens on the rise, home movie nights are entering a new dimension, with viewers immersing themselves in the full home cinema experience.

SALES OF 8K TV'S 17%[▲]

SALES OF CORNER SOFAS 9%[▲]



SALES OF 82" TV

377%[▲]



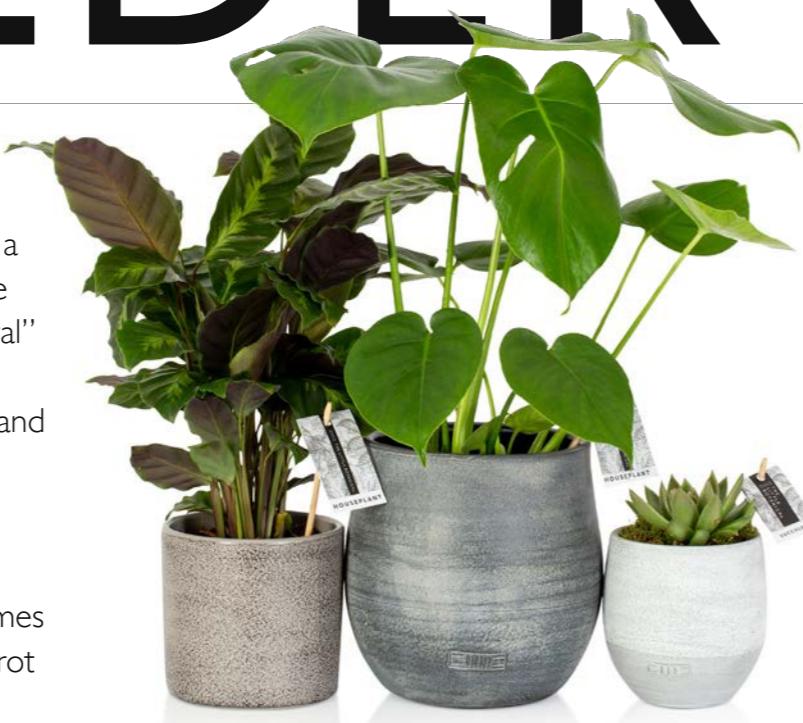
INFORMAL DINNER PARTIES

Ambitious cuisine in the home is off the menu, as hosting becomes less formal and more impromptu. As a result of the nation's healthy appetite for simple, hearty, one-pot meals, casserole dishes are increasing in popularity, while sales of oven to table dishware are on the decline (-8%), alongside fish kettles (which we've now stopped selling), and soufflé dishes.

THE BOLDER THE BETTER

This year, warmer tones came to the fore in a move away from greys and muted pinks. The palette of the year is undoubtedly “living coral” (celebrated as Pantone’s Colour of the Year) and terracotta shades, punctuated by forest and emerald greens.

When it comes to patterns on upholstery, cushions, bedding and wallpaper, it is again a case of the bolder, the better. Inspiration comes from our feathered friends, with sales of parrot prints and peacock prints taking flight.



COLOUR AT CHRISTMAS

The temporary nature of Christmas decorations meant customers were happy to go all-out with a multi-coloured theme. Our Rainbow Christmas tree was a best-seller.



A TOUCH OF PLANT LIFE

Green is not just for upholstery and walls. Living spaces today often feature botanical elements, particularly easy-care succulents. Sales of our Little Botanical plant “gangs” have gone wild, with the New Home range, proving most popular. We are also selling planters for the first time.

RIOTOUS COLOUR IN THE GARDEN

Customers' appetite for colour is at its strongest outdoors. Playful and whimsical, furniture in the Brazilian carnival-inspired Salsa range has flown out of our shops with mustard yellow, hot pink and emerald green all best-sellers this summer.



DRAMATIC EMBELLISHMENTS

As customers are spending more time in their homes, they are upping the luxury stakes. No matter the size of the room, a taste for theatrical opulence is both accessible and acceptable. For instance, over the past year nearly one third of customers brought brass, copper, velvet or marble into their homes. To meet demand, we launched an entire collection of velvet soft furnishings.

THE TIDY REVOLUTION

2019 was the year to tidy up and get serious about storage. The launch of a new series from organisation expert Marie Kondo kickstarted the tidy revolution, showing viewers how storage could be both beautiful and functional. Our customers fully embraced the chance to do away with crammed cupboards and overcrowded shelves. Stylish baskets are one of our best-selling storage solutions, fashioned from natural materials including seagrass, water hyacinth and jute (a natural vegetable fibre).

JANUARY WAS OUR MOST POPULAR MONTH FOR ORGANISING, SALES ROSE BY:

STORAGE BOXES	47%	▲
BASKETS	24%	▲
CLOTHING HOOKS	36%	▲
MODULAR STORAGE	16%	▲



HOW WE LOOKED



Today's customers have an eye for detail and a taste for luxury when it comes to their wardrobe choices. They spend wisely, investing in quality fabrics that transcend the seasons. The new John Lewis & Partners menswear offering features corduroy, classic checks and herringbone, all reinvented in unexpected forms, such as bomber jackets and shearling coats. Luxe textures are fundamental to the collection's focus on endurance and quality.

The success of last year's launch of John Lewis & Partners womenswear is testament to the fact that there are new realms when it comes to fashion. Feeling good in garments is as important as looking good and restrictive, tight-fitting clothing has been replaced with voluminous cashmere, longer lengths and looser-fitting styles.



MODESTY REIGNS

This year we saw mini dresses fall from favour, with John Lewis & Partners own brand eliminating them from the range. Instead, the emerald Hush Kensington shirt dress was among the top ten best sellers of the year and Kin dresses, with their kimono silhouettes, saw a 20% sales increase. The trend kicked off last Christmas, when midi dresses (+152%) and maxi dresses (+179%) were the go-to length for the party season.

Chunky, textured, oversized cashmere sweaters were another standout success for Autumn/Winter. The look's style icon? A pregnant Duchess of Sussex, who favoured casual shirts and loose dresses over designated maternity wear.

Tailoring saw a revival, with customers mixing and matching jackets to dress up or down for any occasion and there was a 33% increase in sales of high-rise, ankle-length trousers. Wide-leg culottes were +51%, as mini skirts went out of fashion.



KIN KIMONO DRESS

90% ▲

KIN OVERTSIZED DRESSES

20% ▲

KIN OVERTSIZED WOVEN TOPS

11% ▲



SUPERGA WHITE TRAINERS

116% ▲



UTILITY CHIC

Customers tend to be more willing to invest if a new garment features standout details that can be styled multiple ways. For instance, pockets on dresses, white shirts with epaulettes and belting are all big news. These finishing touches give an air of "utility chic" to everyday apparel. Long associated with utilitarian workwear, denim is not just for jeans. AND/OR expanded its denim range to feature more denim blouses, jumpsuits, dresses and even a trench coat. For men, "blue collar" workwear is also on-trend, with plain overshirts, canvas fabrics and functional jackets favoured and navy dominating colour schemes.

BARELY THERE UNDERWEAR



T-SHIRT BRAS

81% ▲

In keeping with customers' preference for functional comfort, underwear is now understated and less structured. Nude tones continue to grow in popularity and we added a wider array of options to our t-shirt bra collection this year. Seamfree crop tops were best sellers, as were stick-on strapless bras, bringing freedom for those who want to feel comfortable and supported in backless or strapless outfits.

NON-WIRED BRAS

65% ▲

PUSH-UP BRAS

7% ▼



Last year's hit leopard print dress was the start of something bigger, with animal prints of all kinds proving best sellers in 2019. The Mint Velvet snake print shirt was the fifth most popular item across all womenswear purchases. Jungle fever spread from shirts and dresses to accessories such as snakeskin shoes and blue leopard print swimwear, both of which were best sellers.

LEOPARD 333% ▲



SNAKESKIN 241% ▲



ZEBRA 230% ▲



THE RISE OF THE ONE PIECE

MARCH SAW THE LAUNCH OF OUR KIN UTILITY BOILERSUIT

March ▲

With busy lives to lead, there's not always time or inclination for a wardrobe change. Instead, clothing has to work harder, taking customers from desk to dinner. This has led to the rise of the one piece. The ultimate in versatile, comfortable dressing, boilersuit sales have proved popular this year. Teamed with functional white pumps or a glamourous heel, they can feel either casual or dressed up depending on the occasion.

ONE PIECE SWIMSUITS

15.6% ▲

A chic holiday wardrobe also involved covering up, and we welcomed the return of the swimsuit with one pieces outselling bikinis. The rise of "maxi resortwear", such as floor-skimming kaftans and sundresses took on-trend holidaymakers from beach to bar.



THE PARTNERS
BEHIND THE STORY



"We've made a commitment to offer the most sustainable and traceable cashmere on the market and work closely with our cashmere suppliers in Mongolia to ensure the highest standards of welfare for the goats and working conditions in the factories. Customers can treasure their cashmere pieces even more, knowing that their purchase has a positive impact on a local community."

STEPHEN CAWLEY

Partner & Head of Sustainability
and Responsible Sourcing



A RESPONSIBLE
APPROACH
TO FASHION

When it came to relaunching John Lewis & Partners menswear, sustainability was a key priority and the team at John Lewis & Partners are dedicated to developing sustainable supply chains and transitioning to more sustainable materials. Working with organisations such as REPREEVE®, ensures that the stuffing in outerwear products is made of 100% recycled polyester. An ongoing collaboration with The Better Cotton Initiative (BCI) has seen a growing focus upon training farmers around smarter water usage, limited pesticides, fair wages and education for cotton growers. Beyond our own brand collection, we have introduced a number of contemporary Menswear brands, such as Wax London, Save Khaki and Tretorn, which blend beautifully designed products with thoughtful manufacturing processes and sustainability initiatives.

AS SEEN ON
INSTA



More than any other year, social media has curated our day-to-day choices, from what we wear to where we book a table for date night. Through collaborations, John Lewis & Partners products have sold out, as followers recreate their favourite looks. For instance, the hero John Lewis & Partners AW18 raspberry pink wrap coat, worn by the stylist @Erica_Davies, saw sales spike the week after she snapped it on Instagram.



THE ART OF LOOKING NATURAL

The minimalist beauty movement is here to stay. Inspired by vloggers and Instagrammers who know how to accentuate and celebrate their best features, this natural, radiant look focuses on embracing diversity, instead of covering up "flaws".

But beauty today is not just about looking radiant and fresh from the salon. Increased environmental awareness is pushing the industry towards innovative manufacturing techniques and a range of sustainable initiatives, as customers demand greater environmental accountability from the industry.

THE PARTNERS BEHIND THE STORY



"Earlier this year we pioneered a beauty recycling trial, BeautyCycle, which offered My JohnLewis members the chance to bring back their empty makeup and skincare packaging for recycling. The initiative saw huge success with over 11,000 products recycled and plans to expand the scheme are already under way."

STEPHEN CAWLEY

Partner & Head of Sustainability
and Responsible Sourcing



CLOSE-UP ON SUSTAINABLE BEAUTY

As customers become more mindful about what they buy and look for ways to reduce packaging waste, the beauty industry is adapting and innovating its manufacturing and product disposal processes to become more sustainable. Brands leading the way include REN, which uses reclaimed ocean plastic for its packaging, Caudalie which pledges to plant over eight million trees by 2021, and Elemis, which runs its own sustainable farms to source product ingredients. Sun creams that don't damage coral reefs are also growing in popularity as consumers become more aware of the harmful side effects sunscreen can have on the environment.



WHAT'S IN THE COUNTRY'S MAKEUP BAGS?

2014

In 2014, the John Lewis Retail Report revealed the must-have beauty items in customers' makeup bags.



THE MASCARA

Long, luscious lashes were still top of the beauty agenda with Benefit's They're Real proving to be the must-have mascara.



THE LIPSTICK

The Clinique Chubby Stick was 2014's most wanted lipstick and lip liners were up 30%.



THE NAIL VARNISH

Gelicious nails were the beauty essential with Nails Inc. Gel Effect Polish proving to be a must have.



THE CONCEALER

YSL Touche Éclat was the cover-up essential of 2014.



THE HAIR CARE

Liz Earle Botanical Hair Shine was the product of choice for glossy locks.



THE FOUNDATION

Customers created blemish-free, even complexions with Estée Lauder Double Wear foundation.



THE EYELINER

Customers opted for Bobbi Brown Long-Wear Eye Pencil in Mahogany to create their 60s flicks.



THE EYESHADOW

Bobbi Brown Long Wear Cream Shadow Stick was the beauty necessity for 2014 when it came to durable eye make-up.



THE SCENT

Tom Ford Violet Blonde Eau de Parfum was one of the most popular scents for 2014.

Gone are the days of dramatic contouring and heavy-set foundations. Tinted moisturisers and lightweight powders are replacing less subtle coverage options, with sales of powders up 15% this year.

Eyebrows are still a key feature to emphasise and sales of eyebrow makeup are 17% higher this year. A fluffier, lighter brow, in keeping with today's minimalist preference, replaces last year's more defined look. Natural shades of lipstick and eyeshadow complete the "barely there" effect.

A clear complexion is fundamental to achieving a natural glow and customers are taking better care of their skin than ever, with moisturiser sales 9% higher than last year and SPF moisturisers a makeup bag essential.

2019



THE MASCARA

The smokey eye look is lighter and more subtle than five years ago, but customers still want their eyes to mesmerise, with Lancôme Hypnôse Mascara remaining a best seller.



THE LIPSTICK

Lipsticks are ever-popular, with sales 16% higher than last year. Yves Saint Laurent's no 11 Matte Finish ticks all the boxes, in a go-to nude shade.



THE SPF MOISTURISER

Protecting skin from the sun is now ingrained in beauty routines, with SPF moisturisers a daily essential.



SETTING POWDER

Clever lightweight powders such as the Laura Mercier Translucent Setting Powder give effective coverage without adding texture.



THE BLUSHER

Nars Blush Orgasm is one of the most popular blushers out there for an effortless, dewy, natural glow.



THE PRIMER

Skin preparation is key for a flawless look, with sales of primers up 7% on last year. Clarins Beauty Flash Balm is a firm favourite.



THE FOUNDATION

"Invisible" foundations such as best-seller Chanel Les Beiges create a natural healthy glow.



THE HIGHLIGHTER

A highlighter is now a makeup bag must-have. The best selling BECCA Champagne Pop gives that all-important radiant glow.



THE BROW ENHANCER

With gels and brushes replacing less subtle eyebrow pencils, Benefit's Gimme Brow+ Volumising Gel is now a makeup bag staple.



THE EYESHADOW

The Charlotte Tilbury Eyeshadow Palette, Pillow Talk, is a standout bestseller. Its seductive yet versatile look takes the wearer from desk to dusk.



THE SCENT

In keeping with this year's emphasis on celebrating individuality, Narciso Rodriguez Pure Musc For Her can be layered with other scents from the range to create a personalised signature fragrance.

HOW WILL WE SHOP, LIVE AND LOOK IN 2020



AUDIO SUNGLASSES

Bose launched its AR Audio Sunglasses this year, which utilises top of the range technology to play audio that only the wearer can hear through fashionable eyewear. As 5G expands across the UK, we expect more companies to interplay tech and fashion throughout 2020.



THE PARTNERS BEHIND THE STORY

"Our customers are leading less predictable lives. As the trend for flexible working evolves, developments in technology and 5G connectivity enable consumers to be 'always on' wherever they are. The desire for more functionality and adaptability, particularly in the home, continues to trend as people are embracing co-living and using their living spaces for a plethora of activities, beyond just eating and sleeping. The growing concern for environmental responsibility shows no signs of slowing in 2020, with consumers taking matters into their own hands through urban farming to reusable solutions."

JOHN VARY

Partner & Futurologist



IT'S ALL ABOUT EXPERIENCE

With the high street under more pressure than ever, experience is set to play an even more vital role when consumers "pop to the shops". Transforming shops into destinations is high on the agenda for next year.



HOME TECH

Following the rapid adoption of smart devices and voice assistants in the home and the expansion of 5G, we expect to see further integration of technology in the day to day objects we use.



THE CRYSTAL CRAZE

Crystals and their healing powers are going mainstream. We are soon to stock Australian brand Wicks and Stones, offering a choice of crystals that meet your wellbeing requirements, embedded in a beautiful scented candle.



COOKING UNDER PRESSURE

The pressure cooker is set for a revival. Already hotting up in the States as a must-have kitchen gadget, it won't be long before the UK's stews, curries and risottos are being concocted under pressure.

URBAN FARMING

With growing awareness of our responsibility to the environment, 2020 will see consumers continuing to utilise underused urban spaces to grow their own produce.

WALLPAPERING YOUR CEILING

The trend for bold home styling and statement wallpaper will reach new heights in 2020, with the ceiling set for a makeover.



RENTERS MARKET

With property prices soaring, the rental market continues to boom and we see a growing number of consumers prioritising convenience and flexibility, especially when it comes to their living situation.

"DONE FOR YOU" CHORES

Whether it's a washing machine that auto-doses and can be set remotely, or an e-ink order that places itself when the printer is running low, home tech is about to eliminate even more of the boring bits from everyday life.

WANT TO KNOW MORE?

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