

THE JOHN LEWIS RETAIL REPORT

2017

HOW WE SHOP, LIVE & LOOK
FIVE YEAR SPECIAL

2016

2015

2014

2013

John Lewis



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The majority of statistics within this report come from John Lewis's database between the time period of August 2016 to September 2017. Further information can be provided by the John Lewis press office on request.

Introduction

FIVE YEARS OF THE JOHN LEWIS RETAIL REPORT

On the fifth anniversary of the John Lewis Retail Report, we take stock of the last few transformative years in Britain, and in retail. Read on for an overview of just how much things have changed in the way we shop, live and look.

Cast your mind back five years ago. The UK was still recovering from the 2008 recession and house prices were rising fast. The country was basking in its athletic glory following London 2012 and *Bake Off* was in its honeymoon phase. Today, it's a different story entirely, with popular culture, political upheaval, transformative technology and economic instability all impacting how the British public spends its time and money.

That is what has been so fascinating about creating the John Lewis Retail Report for the last five years. By diving deep into our internal data, and summarising key milestones in the calendar and their effect on shoppers, we can see how quickly things are changing every year.

At John Lewis, we're able to look to the long-term, identifying new trends and how customers might respond to these. This helps us to remain relevant to younger generations, adapting our product and customer offer as the times change.

We use our deep understanding of trends and technological developments to understand not only what customers want today, but also how they will shop tomorrow. This year saw us introduce our most experiential offering to date, giving customers the chance to sleep in some of our shops overnight in a fully furnished apartment called The Residence. We will continue to push the boundaries of the physical shopping environment with unique and memorable try-before-you-buy experiences. Over the period we've invested considerably in both our digital and shop operations to ensure we offer the very best of both worlds to today's demanding and highly expectant customers.

One thing that hasn't changed in this ever-more complex 21st century retail marketplace is that John Lewis is still relied on by millions of customers across the country for expert, trusted, and guaranteed quality, which is never knowingly undersold.

NOW AND THEN

Every year, the John Lewis Retail Report dives into our internal data to understand the most significant changes in taste. It also draws attention to a host of flash-in-the-pan crazes and bids a fond farewell to a few things we've left behind. Based on these insights, here's a snapshot of what's changed over the last five years.

2017

1 MILLION

products stocked by John Lewis

64%

of customer visits to our website
come from smartphones or tablets

BLACK FRIDAY

is the day customers spent the most

CANVAS BAGS

are the new norm

2013

746,000

products stocked by John Lewis

42%

of customer visits to our website
came from smartphones or tablets

CYBER SUNDAY

was the most popular shopping day

PLASTIC BAGS

were used by all

2017

53%

of customer orders online
use Click & Collect

135

connected home
products on offer

THE GREAT POTTERY
THROWDOWN

sparks a ceramic addiction

20+

beard care products now available

2013

40%

of customer orders online
use Click & Collect

3

connected home
products on offer

THE GREAT BRITISH
SEWING BEE

saw searches on sewing
machines triple

1

beard care product stocked

5 FLASH-IN-THE-PAN TRENDS

To remind us how quickly the world moves on, here's a quick look back over some notable trends that caught the nation's attention, if only for an instant. Anyone remember loom bands and the country's love affair with onesies? No, neither did we.

2013

The **men's onesie** was a thing, with Harry Styles championing the look

2014

Loom bands loomed large on the wrists of children and celebrities alike

2015

Stratospheric sales of **spiralisers**, with the rise of "courgetti-spaghetti"

2016

Hunting for **Pokémon** in the park was a socially acceptable activity

2017

Unicorns are now emblazoned on everything from wallets to water bottles

5 THINGS WE LEFT BEHIND

Here are some of the items that fell from favour over the last five years.

2013

Coloured jeans

2014

Cake pops

2015

Thongs

2016

Selfie sticks

2017

Sat Navs

AND 5 THINGS THAT CAME BACK

Every now and again, something that was falling from favour will take on a new lease of life. 2017's "boomerang products" include:

1

BOOKCASES

In 2015 we saw the decline of the bookcase, as customers favoured their shiny new eReaders. This year, books are back, with shelves used to display coffee table books and other *objets d'art*

2

WOODEN TOYS

52% of all the toys we sell are crafted from wood as parents promote old school playtime over screen time

3

RUBIK'S CUBES

This year, the eighties classic puzzle has returned to challenge a new generation, with sales 61% higher than last year

4

RECORD PLAYERS

In 2015 the UK experienced a vinyl revival, which is still gaining momentum as customers love the tangible nature of record ownership

5

FILOFAXES

Not everyone wants to use their phone to store birthdays, addresses and important notes, with an 11% increase in sales of this eighties classic

Chapter One

WHAT SHAPED THE WAY WE SHOPPED IN 2017

This year, Theresa May called a General Election, Trump came to power in the States and Corbyn went to Glastonbury. As Britain looked for ways to cope with, and escape from, a growing sense of uncertainty, all eyes were glued to this summer's hit reality show *Love Island*, and the nation developed a surprising unicorn obsession.



A NATION DISRUPTED

Faced with economic uncertainty and an eventful year in politics, customers spent wisely, only making larger investment purchases where absolutely necessary, but still treating themselves to affordable pick-me-ups, known as the “lipstick effect” (find out more on page 32). Iconic brands and products that have stood the test of time saw a resurgence, as customers gravitated towards what they know and trust. Strong sales of Casio watches, Filofaxes and wooden toys all pointed to a nostalgic fondness for times gone by.

MILLENNIALS SPEAK OUT

Over the last twelve months those in their twenties and early thirties, known as “Millennials” used the power of social media to make their opinions heard. As well as challenging social norms, from the global anti-Trump rallies, to the popularity of “We are all feminists” t-shirts and the enthused gathering of “Corbynistas” at this year’s Glastonbury, this generation is also changing the way we shop. Find out more on page 17.

This was also the year of “Millennial Pink”, a distinctive blush shade that was first found on the coolest Pinterest boards and blogs, before working its way into wardrobes and onto walls. In *How We Looked*, we’ve collated some of the key looks of the year, from stripes to gingham, and identified the social media influencers behind them.

ESCAPING TO A HAPPY PLACE

While the UK stayed firmly in tune with the real world, a touch of the exotic and the fantastic helped people escape from the serious side of life. Unicorn and mermaid-themed products and giant inflatables in the shape of donuts, flamingos and watermelons were all on-trend and saw substantial sales.

- 22% increase in “Mermaid” searches on JohnLewis.com
- 70% increase in “Unicorn” searches on JohnLewis.com
- 99% increase in “Inflatable” searches on JohnLewis.com

BREAKFAST WAS REINVENTED

Another trend this year is the nation’s growing obsession with health-conscious, elaborate breakfasts. We’re not talking about your standard weekend fry-up any more, as sales of fat-free frying pans soared. Instead, it is all about avocado on toast, homemade granola with yoghurt and berries, freshly squeezed orange juice and eggs, with sizzling sales of:

- Egg gadgets +25%
- Avocado tools +40%

Turn to page 24 to learn more about what exactly is cooking in the country’s kitchens.

TIMELINE OF THE YEAR

2016

OCTOBER

BRITS SPLASH OUT ON HALLOWEEN

The popularity of Halloween soared this year, with the UK estimated to have spent a record £310m on the spooky celebration. We saw Halloween-themed sales rise 116%.

NOVEMBER

TRUMP GETS IN (AND THE UK TUNES INTO *THE CROWN*)

As the controversial new leader celebrates his victory, the hit TV series *The Crown* airs in the UK and we see stronger sales of patriotic royal memorabilia.



DECEMBER

STAR WARS ROGUE ONE RELEASED

Just in time for Christmas, *Star Wars* toys rocketed in sales, with best sellers including the Sphero BB8 Droid.

GIFTS FOR PETS

John Lewis's Buster the Boxer kicked off a season of appreciation for the nation's pets, with dog advent calendars and reindeer outfits for pets selling out.

2017



FEBRUARY

BARBOURS AT THE READY

American actress and Prince Harry's girlfriend, Meghan Markle, sports a Barbour jacket and Hunter wellies in London. Barbour coats are the most popular womenswear item of the year.



JANUARY

HOLLYWOOD STRIKES GOLD WITH *LA LA LAND*

Searches for "yellow" peak on the John Lewis website, as customers took style inspiration from actress Emma Stone.



MAY

PRINCESS CHARLOTTE TURNS TWO

The youngest Royal was photographed in a pale yellow Fair Isle cardigan from John Lewis, leading it to sell out.



APRIL

FIDGET SPINNERS BECOME A NATIONAL OBSESSION

Theresa May calls a General Election, and we start to see the rise of the Fidget Spinner, helping people across the country spin away nerves.



MARCH

THE GREAT POTTERY THROWDOWN REACHES ITS CLIMAX

The nation has a ceramic addiction, with sales of ceramic bowls increasing 33%.

INTERNATIONAL AVOCADO SHORTAGE

Last Spring, wholesale prices of avocados in the UK surged more than 50% as harvests fail. Despite the shortage, we sold 40% more avocado tools this year than last.



JUNE

THE GENERAL ELECTION CREATES UNCERTAINTY

Perhaps reflecting the need for small comforts in times of instability, gin sales were on the up and 9% more customers decided to treat themselves compared to May 2017.

JULY

CAPTIVATED BY *LOVE ISLAND*

Sales of Camelbak water bottles, which are heavily featured in the show, rose by 40%.



#SHELFIE

The latest Instagram craze, the #Shelfie, where books and objets d'art are hashtagged on social media, prompted an 11% increase in sales of bookcases.



SUMMER HEATWAVE HITS

Following a rainy start to the month, the nation enjoyed some of its highest temperatures in June since 1976, with fan searches spiralling by 900%.



AUGUST

BAKE OFF UNDER NEW MANAGEMENT

As customers replicated the sweet treats seen on the show, sales of cookie cutters and cupcake tools rose by 50% and 85% compared to last year.

THE PRODUCTS THAT DEFINED THE YEAR

1

THE VELVET SOFA

This has been the year of the velvet sofa. Sales of the sumptuous fabric formed a significant part of our overall sofa and chair sales, helping the UK's homes to look plush. Customers also plumped for velvet throws and cushions, with sales rises of 46% and 56%.



2

THE GIN BALLOON GLASS

Gin was well and truly in, with balloon glasses favoured as the way to create a classic gin and tonic or a more exotic gin-based cocktail. The nation's sophisticated taste in tipples was also evident in overall sales of cocktail glasses, which increased by 100%, and measuring jiggers, whose sales were 59% stronger than last year.



3

THE KHAKE JACKET

For both men and women, khaki jackets were big news in 2017, summing up the appetite for effortless, comfortable styles that could be dressed up or down depending on the occasion. We saw the most searches in June, when customers had set aside their winter coats.

4

THE SHEET MASK

Celebrities including Victoria Beckham, Emma Stone, Drew Barrymore and Jessica Chastain all starred in a #sheetmaskselfie. Consequently, sheet masks have been a huge best seller. The Estée Lauder Powerfoil mask saw a 123% sales increase on last year.



5

THE VOICE ACTIVATED ASSISTANT

Although it has only just launched, we've already seen strong sales of Google Home. This hands-free smart assistant uses voice activation so you can ask it questions, and tell it to do things, whether that's setting alarms, adding to your shopping list, controlling your thermostat or your music. It can even tell the difference between your voice and other family members.

6

THE CACTUS

Customers took inspiration from California for their home styling this summer, with searches for "cactus" on JohnLewis.com spiking 162% compared to last year. Favourite products included artificial cacti, cactus beach towels and duvets and this stoneware vase.



THE COLOUR OF THE YEAR: MILLENNIAL PINK

This dusky shade of pink exploded onto social media feeds, to inspire home purchases, hairstyles and the hottest fashions, with searches for 'pink' peaking sharply in early July.

- MAC's Velvet Teddy lipstick, a very close match to so-called millennial pink, was a best-seller and saw a huge spike in searches this year
- Equally, bedroom accessories in this shade saw a 28% increase in sales



THE EMBLEM OF THE YEAR: THE UNICORN

The mythical unicorn was the icon of the year, with searches increasing 70% compared to last year on JohnLewis.com. Unicorns were emblazoned on everything from napkins to necklaces; we even introduced a bottle of gin called Unicorn Tears.



WHAT WE LEFT BEHIND IN 2017

1

SAT NAVS

With built-in Sat Navs and smartphones taking the driving seat when it comes to getting from A to B, we plan to remove these devices from our stocklist.



2

eREADERS

It appears you can't beat a good old-fashioned book; searches for eReaders declined by 33% compared to last year and sales were down by 23%.



3

SPIRALIZERS

The spiralizing craze of two years ago has fizzled out, with online searches down by 53% and sales declining by 40%.



4

ANALOGUE RADIOS

In the next few years the UK will officially switch off the FM radio signal and move to digital radio. In anticipation, customers are tuning out of analogue radios.

5

OFFICE SUITS FOR WOMEN

For ladies, the traditional "office suit" is becoming a thing of the past, with matching suit jackets and skirts seeing a 10% decline.



6

PUSH-UP BRAS

The nineties classic push-up bra has plunged in sales. Increasingly, customers favour non-padded options, which saw an uplift in sales of 20% compared to last year.



7

CUMMERBUNDS

Men still dress up for formal occasions, with strong sales of bow ties over the last twelve months, however, the cummerbund is being consigned to the fashion archives, with demand dropping 21% in the last five years.



Chapter Two

HOW WE SHOPPED

Customers today expect the full package of great service, plenty of choice and the highest quality at an affordable price across all channels. But in 2017 this is not enough. While shoppers continue to turn to their mobile phones as a quick and convenient way to make purchases, shops must be destinations for a broad range of memorable and unique experiences.



THE POWER OF EXPERIENCE

In 2017, the experience is often as important as the product, with people wanting to treasure memorable moments spent with friends and families in their busy lives. To accommodate this growing thirst for new experiences, our shops are now destinations for inspiration and enjoyment, as well as shopping.

Over the last twelve months we've introduced a range of unique experiences, inviting customers to:

- Book a private summerhouse for lunch on the roof of John Lewis Oxford Street
- Discover the latest style advice from Vogue and receive personal styling tips
- Live cooking demonstrations from celebrity chefs like Jamie Oliver and Rick Stein
- A midnight 'Force Friday' experience for Star Wars fans, who could pose with Stormtroopers and test out the new Collector's Edition Battling Drones
- Boost their fitness regimes with rooftop boxing and yoga sessions
- Create the perfect festive feel, with a Christmas home styling "tree-torial"
- Enjoy high tea in a Wedgewood pop-up tea room

BUT SERVICE IS STILL KING

Customers today expect to be able to find, purchase and explore all our products online, with a quick, convenient pick-up or delivery method to meet their needs. Often, shopping journeys mix online and physical experiences:

- 20% of online purchases are researched in a John Lewis shop
- 32% of online customers have already visited a John Lewis shop

With so much crossover between different channels, customer service remains the glue that holds the entire experience together. To support this, 14,000 John Lewis Partners on the shopfloor will soon have access to iPhone 6s with specially designed apps to:

- Help customers track orders
- Assist with product questions
- Demonstrate online ordering and sign customers up to MyJohnLewis



THE YEAR WE SLEPT IN SHOPS

For the first time ever, customers had the opportunity to sleep in a John Lewis shop overnight, with the arrival of The Residence in Oxford Street, Liverpool and Cambridge. As our most immersive shopping experience to date, everything in this fully furnished apartment could be purchased. Featuring the latest home, tech and fashion, customers could explore every cupboard and wardrobe, jump on the beds, sit at the dining table to read the newspaper and smell the coffee, just as though they were in their own home.

Customers could also apply to host a dinner party in the space, with a private chef and mixologist. For those who were invited to sleep over, a private concierge was on hand to ensure a comfortable stay and provide midnight snacks from Waitrose. During the day, workshops ran in the space, featuring experts on topics including sleeping well, choosing the right lighting and planning the perfect dinner party.



THE RESIDENCE IN NUMBERS

17,000

customers visited within two weeks of opening

3,000

customers applied for the opportunity to sleepover or dine in The Residence within the first fortnight

£2 million

The estimated price tag from estate agents Savills for The Residence on Oxford Street, reflective of the central London location and high specification interior

60

minutes of after-hours private shopping offered during a sleepover at The Residence

10

The number of guests that customers could invite to a private dinner party at The Residence



MILLENNIALS ARE CHANGING THE WAY WE SHOP

This focus on in-store experiences is partly driven by the expectations of our younger shoppers in their twenties and thirties, otherwise known as Millennials. More than previous generations, Millennials value shared experiences and activities with friends, particularly when they can immortalise them in pictures or on video for social media.

- Personalised denim jackets, free tattoo transfers and in-shop photo-booths were among the more creative brand and product launches from John Lewis to target these customers
- Millennials are twice as likely to have a beauty treatment whilst shopping as more mature customers
- They are three times as likely to do another leisure activity such as bowling when out shopping
- Millennials are twice as likely to use their mobile phones to compare prices

MILLENNIALS' MOST WANTED GIFT EXPERIENCES

Out of the many gift experiences sold at John Lewis, the most popular among those aged 18-29 are:

- **Glamping:** Not wanting to "rough it", posh camping is the number one gift choice for 18-29 year olds
- **Afternoon tea:** If Noel Fielding is not too cool for tea and cakes, neither are Millennials
- **Rural escape for two:** With rural escapes the third most popular gift experience, it appears Millennials want to relax and get away from it all



MOONLIGHT SHOPPING

Shopping is now a 24-hour occupation, with an average of 9,000 orders a night on JohnLewis.com. Diamond rings, sewing machines and smart TVs are among the most expensive purchases made in the small hours.

23:00

After towels, bedding and tights, SONOS is the most popular purchase as people tune into their nocturnal musical needs



00:00

One of our customers waited til the midnight hour to invest in a summerhouse worth nearly £7,000



01:00

The most expensive item bought on our website at 1am was a diamond engagement ring worth £6,995

02:00

Sony Playstation and Horizon Zero Dawn are best sellers for gaming nightowls



A £5,000 Janome sewing machine was a night-time investment for one keen crafter

03:00

At 3am, a Britannia Fleet Dual Fuel Range Cooker worth over £3,000 was snapped up

04:00

Dreaming of luscious lips, the Chanel liquid lipstick is one of our top sellers at 4am



05:00

At £4,299, the Samsung Curved Smart TV was the most expensive item bought at this time



Most popular brand searches in different areas at 3am:

● London:	Chanel
● Birmingham:	Joules
● Dublin:	Kipling
● Liverpool:	Barbour
● Bristol:	Ted Baker
● Southampton:	Yves Saint Laurent

Kipling
Barbour
Joules
Ted Baker
Chanel
Yves Saint Laurent

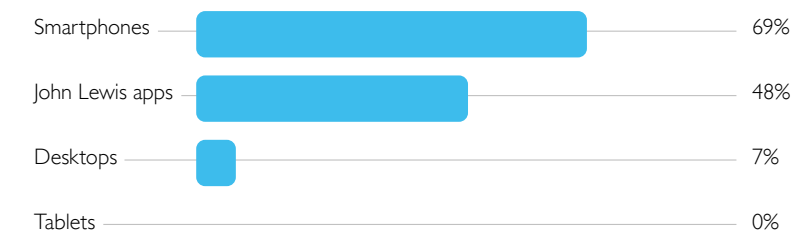
HOW WE SHOPPED ON MOBILE

The mobile shopping experience of 2017 is quick and simple, with almost everyone using their phone to browse and buy.

FOR CUSTOMERS TODAY MOBILE SHOPPING IS SECOND NATURE

With mobile shopping now the norm, it is easy to forget that this is only a recent state of affairs. Back in 2014, only a quarter of traffic on JohnLewis.com came from mobiles. Today, that figure is well over a third (37%). In fact, transactions through the John Lewis mobile website and John Lewis apps are increasing more than any other channel.

% increase in John Lewis purchases since 2016



The most popular products viewed via the John Lewis app are Sonos speakers, Dyson hairdryers and MAC lipsticks



SOCIAL MEDIA MEANS A WARDROBE REFRESH IS MORE TEMPTING THAN EVER

Womenswear sees higher spend via social than any other category, suggesting it is hard to resist a wardrobe refresh when you see something you love on social media. Other areas where customers frequently seek social media inspiration include smartphone purchases and childrenswear, as busy parents seek out quick must-haves for their little ones.

BITE-SIZE SHOPPING FOR BUSY LIVES

One reason for the growing dominance of mobile in everyone's lives is that it allows for a bite-size shopping experience. When customers only have a few minutes to spare they can browse for inspiration or buy an urgent item within a matter of minutes.

As customers become experienced mobile shoppers, they are getting faster at finding what they need. The average mobile browsing session is now six minutes long; that's eight seconds faster than last year, with more browsing sessions than ever before leading to a purchase.



Chapter Three

HOW WE LIVED

This year saw the rise of Millennial Pink, the #shelfie and the velvet sofa. But for customers in 2017, interior styling is not so much about staying on-trend as celebrating individuality, as customers use social media and online inspiration to create more personal “displays” in the home.



CUSTOMERS USE THEIR HOMES TO SHOWCASE THEIR PERSONALITIES

Whether it's their global travels, a hint of “Hygge” or something altogether more British that inspires them, increasingly customers take the time to browse social media, and seek out pieces for the home that will best express their personality.

In their quest to showcase the best of their taste and possessions, clutter is not on the agenda and we saw a 15% increase in home storage. This spring's #shelfie craze, where shelves of beautiful items featured in Instagram posts, confirmed that shelving units are being used as a form of orderly “shelf expression”, to display books and *objets d'art*.

- 11% increase in sales of bookcases
- 33% increase in modular boxes for stow-away storage

Despite the appetite for personal expression in the home, customers this year have been cautious, sourcing a few new pieces to set their rooms apart, without stretching their budgets. However, quality and comfort were still key. Responding to this appreciation for affordable self-expression, we introduced the Collector's House range, an eclectic collection, mixing pieces from different styles and eras to allow customers to create their own individual take on any trend.

An exclusive partnership with sofa specialists Loaf helped us fulfill the appetite for laid back “sofa chic”. The finish of choice was velvet and one of the most favoured colours was, of course, Millennial Pink.

Customers also took a more creative approach to outdoor spaces, transforming their gardens into areas for relaxing and entertaining, leading to a 27% increase in outdoor furniture sales online. Comfort was key, with a 65% increase in outdoor armchair sales and a 20% increase in garden studios.

THIS YEAR'S COLOUR OBSESSION: MILLENNIAL PINK

Since January 2017, Pinterest has been awash with the distinctive, muted blush shade known as Millennial Pink. Cue sales increases of the colour across John Lewis home furnishings. For instance, there was a 28% increase in Millennial Pink bed linen.

This shade perfectly complements the other staple of 2017's home palette: grey. Over the last two years, grey has toppled creams and beiges to become the best selling base for bolder choices and we saw a 33% increase in grey bedding sales.

FIVE YEAR FLASHBACK:

- Crystal light fittings dazzled the nation, with sales up 18%. Today, customers have switched to industrial chic, with strong sales of brass, copper and pewter fittings.
- White bed linen dominated our sales in 2012 - it was difficult to sell anything with colour or design.



WHICH HOME STYLE TRIBE ARE YOU?

While there is no typical customer, our sales data speaks of some distinctly different styles and tastes found in UK homes. Pick your favourite item from each row to find out whether you belong to the Luxury Lovers, Scandi-fans, Nomadic Settlers or British Eclectics:

WHICH SEAT SUITS YOU BEST?



WHICH CUSHION DO YOU PREFER?



WHICH THROW WOULD YOU SNUGGLE UP IN?



WHICH IS YOUR FAVOURITE VASE?



WHICH SIDE TABLE TAKES YOUR FANCY?



LUXURY LOVERS (MOSTLY A)

Many of our customers enjoy a touch of sumptuous indulgence in their homes. With dramatic decorative accessories and gold, copper and brass lighting adding decadent allure. Sales increased in all the following: velvet cushions (56%), silk pillowcases (44%) and grey fur throws (35%).

NOMADIC SETTLERS (MOSTLY B)

Inspired by stories and memories of times abroad, these bohemian globetrotters create vibrant looks in their homes, featuring vivid colours, ethnic prints and embroidered floor cushions. Our Dakar range takes inspiration from the Moroccan souk and the Turkish bazaar. We saw strong sales of ethnic-inspired table linens, pom pom storage bags and llama-embroidered cushions.

SCANDI-FANS (MOSTLY C)

The Danish word "hygge", meaning special moments spent together, dominated this winter, with *The Little Book of Hygge* a bestseller. The calming, minimalist Scandi look, has been a favourite among customers for several years, with top-sellers including natural weave textures for cushions, bed linen and wallpaper.

BRITISH ECLECTICS (MOSTLY D)

A growing fondness for all things British is emerging. Many are opting for decorative eclectic styling that mixes tradition with today. We introduced a new collection of Liberty Fabric prints, collaborated with the V&A and launched a best-selling print inspired by an English country garden. Evidence of this tribe in action includes increasing sales of William Morris wallpaper (19%) and Royal memorabilia.

STYLE PIONEER (IT'S A TIE)

These customers can't be pinned down. They mix and match looks with ease and authority to create their dream home aesthetic.

THE GREAT BRITISH BREAKFAST REINVENTED

Gone are the days of greasy fry-ups and sugary cereals. Breakfast is now a more healthy and elaborate affair featuring eggs, avocados and fat-free frying.

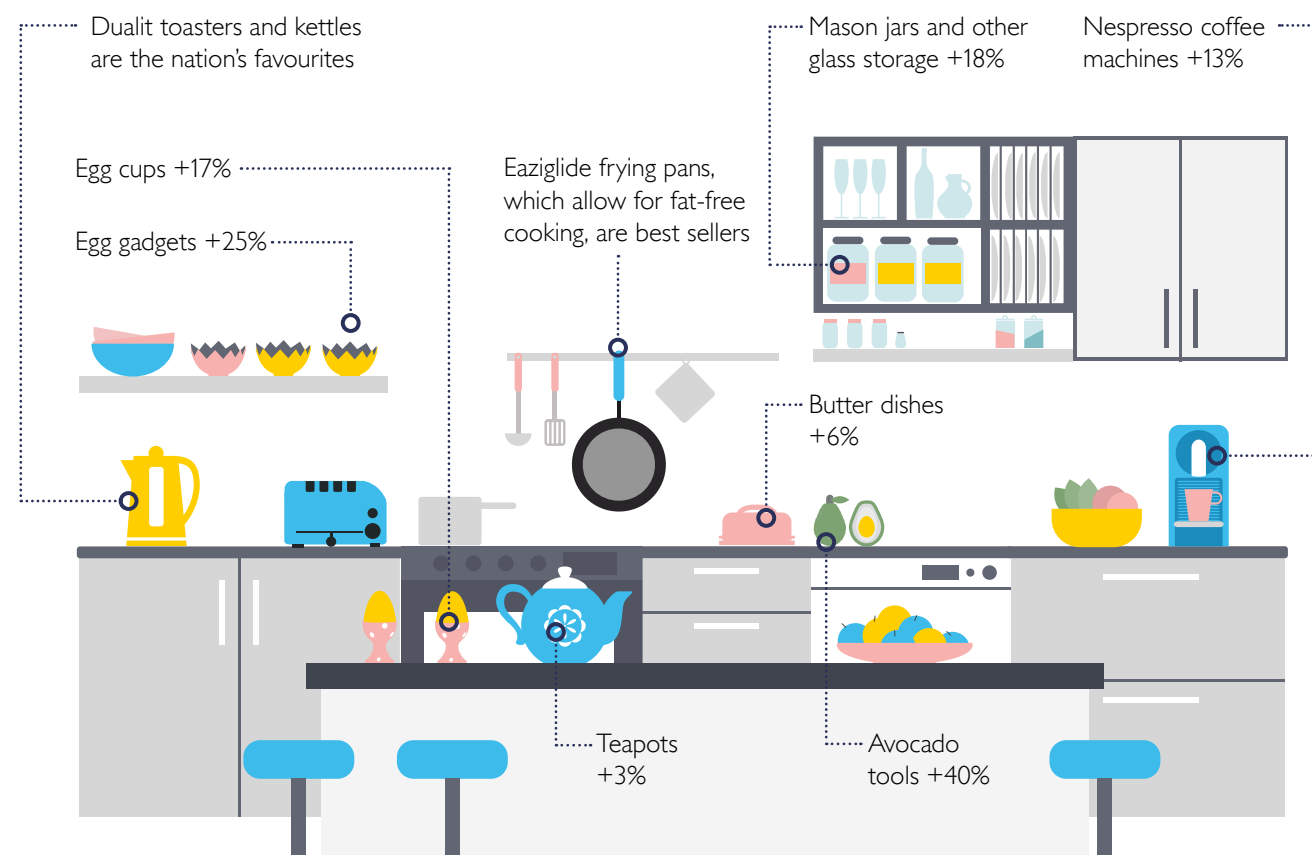


This year, health-conscious breakfasts are replacing traditional greasy fry-ups, with sales of fat-free frying pans soaring. Current breakfast favourites include avocado on toast, homemade granola with yoghurt and berries, freshly squeezed orange juice and eggs, with sizzling sales of egg gadgets (+25%) and avocado tools (+40%). Launched this year, the Jason Atherton Social range was designed with sharing in mind; ideal for long, relaxed weekend breakfasts.



FIVE YEAR FLASHBACK:

Five years ago, the nation had not yet discovered the NutriBullet and the Vitamix; powerful juicers and blenders that have redefined how we guzzle our greens.



A PEEK INTO THE NATION'S KITCHENS

You can tell a lot about a country by their kitchens. In 2017, British kitchens are all about practical, healthy eating, with the right gadgets and ingredients to grab a quick snack or savour an elaborate feast. And almost every kitchen features a trendy coffee machine.



BLENDING OUTDOORS AND INDOORS

As customers stretch their culinary repertoires, their kitchens are expanding to include the outdoors. BBQs, smokers and pizza ovens have all seen strong sales this year; the Uuni Pizza Oven and Landmann Tennessee Smoker both sold out.

THE CONNECTED KITCHEN

This year, overall sales of connected home tech increased 160%. The connected kitchen is an important part of this and the latest kitchen blinds, washing machines, fridges and ovens can all be controlled by apps.

BOWLS INSTEAD OF PLATES?

Whether they are tucking into pasta, ramen or salad, customers increasingly favour bowls over plates. Their sales have increased 5%, compared to plates, which dropped 12%.

"GRAB AND GO" DINING

The kitchen is the engine of the home, where everyone comes to refuel, even when they're in a rush. This year, we've seen significant rises in water bottles (up 50%), lunch boxes (80%) and thermal mugs (15%); a reflection of the growing trend for "grab and go" food and drink. Modern day pressure cookers are also making a comeback as a quick way to prepare the evening meal.

ECO-CONSCIOUS KITCHENS

Reflecting a growing awareness of the environmental impact of lifestyle choices, we've seen a sales increase of 12% in plastic food storage, as customers cut back on food waste. Our eco-friendly, natural cleaning products are steadily growing in popularity and recycling bins are a must for any modern kitchen.

THE AGE OF INVISI-TECH

Unightly black boxes and bundles of wires are being banished from the home of 2017 as a growing range of "invisi-tech" products emerge. Sleek, wireless and noninvasive, they blend aesthetic appeal with complex functionality.



- TVs are either super-thin or aesthetically designed. The Samsung Frame TV turns into a picture when not in use and has doubled in sales in the last few months
- The Dyson cordless vacuum is the third most popular item on wishlists
- Wireless headphones have increased in sales by 250%. AirPods earphones go one step further and stop playing when you take them out
- Sonos speakers (the second most popular item on customers' wishlists) are designed to be hidden
- Sales of wired accessories such as USB leads and power cables, are down by 21%, while wireless computing accessories, including mice and stylus, have increased 43%
- Portable wireless battery charger sales are 72% up on last year

Chapter Four

HOW WE LOOKED

Style in 2017 is all about being yourself. Gone is the age of fast fashion; now customers look for staple investment pieces to mix and match with a few statement items in tune with this year's trends for khaki, denim, loungewear and, of course, pink.



THE NEW AGE OF AUTHENTICITY

Gone are the days of fast fashion, where everyone wanted to own the latest "must-haves". Partly a sign of the economic times, customers need their wardrobes to work harder and are less prepared to invest in items that they will only wear a few times. They are looking for clothes that match their lifestyles, say something about their personality and feel well-made.

That's not to say they want to blend into the background. There was a strong appetite in womenswear and menswear for bright colours and eye-catching pieces this year. For instance:

- In womenswear, sales of yellow and gold items increased in sales by 44% and 47%
- In menswear, pink t-shirts saw a 74% increase and brightly coloured shirts rose 54%

But statement pieces needed to be worn with conviction and say something about the wearer, rather than feeling like a fashion fad. Age has never been less relevant as attitude and personality come to the fore. Our modern rarity womenswear range is a "slow fashion" concept, designed to offer timeless quality pieces that speak to customers in their nineties, as well as those in their twenties.

BRANDS SHARE THEIR STORIES

As awareness around product origins and manufacturing rises, having a point of view has never been more important for clothing brands. Items must not only look good and make the wearer feel good but also have an authentic story to tell. For instance, sales of Toms, a brand which donate shoes to children in need, recently increased 57%. Equally, John Lewis men's swim shorts are now made from recycled plastic bottles. They too increased in sales, (39% compared to last year).

FIVE YEAR FLASHBACK:

- In 2013, fast fashion was in full swing, with customers adopting a "buy now, wear now" mentality, as we saw with the rise of the "It Bag", (an on-trend designer bag, which changed on an almost monthly basis).
- By 2013, we'd reached peak "grandparent chic", with sales of vintage-style products like pearls, silk handkerchiefs, cravats and tweed booming. Today, customers are still inspired by trends from previous decades, but references are more subtle, creating a more personal interpretation.



THE NATION'S LOVE AFFAIR WITH LOUNGEWEAR

Designed for snuggling and snoozing in those essential moments of downtime, loungewear has become an established category in its own right. Not quite the same as sportswear, this is all about comfort and relaxation, with soft, tactile items, such as cotton drawstrings and loose cashmere sweaters, defining its appeal.

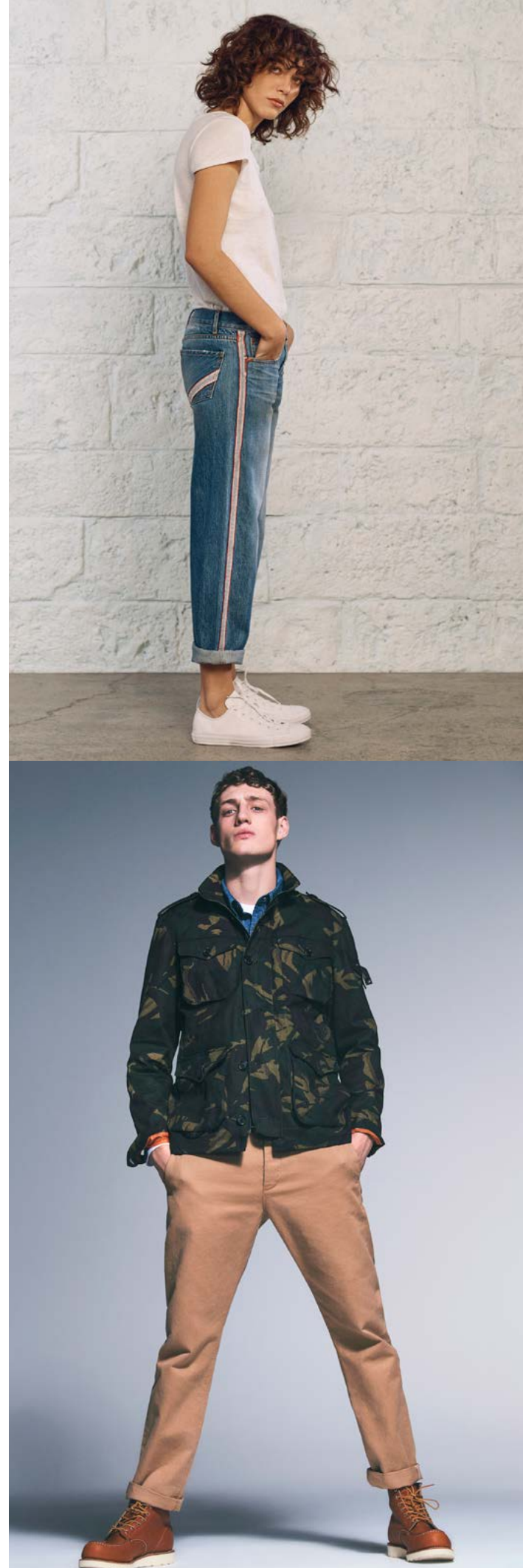
When leaving the house, comfort and effortless style are still front of mind. In womenswear, looser fitting "Boyfriend" jeans are now edging towards overtaking long-term favourite, skinny jeans. Teamed with a khaki jacket and simple white trainers or pool sliders, this is a look that can work for everyone. Trousers are less formal too, with a trend for sporty stripes down the sides, even for workwear. In fact, women's office suits are becoming a thing of the past, with matching suit jackets and skirts seeing a 10% decline.

Men broke up their suits, by wearing them as separates teamed with trainers, t-shirts, knitwear and other more casual touches. Softer, jersey material was a best selling option for men's suits, and we even introduced drawstring waistbands so the comfort of loungewear wasn't confined to the home.

IS STAYING IN THE NEW GOING OUT?

The flip side of this love affair with casual style is a shift in the formalwear market for both men and womenswear. While dressing up for a wedding or similar celebration is still the done thing, evening gowns, have been replaced by more versatile "dress up or down" options. And with Millennials socialising in pubs and clubs less than previous generations, "going out clothes" are not so relevant as they once were.

But no matter how customers choose to spend their leisure time, what's certain is that this has been a year of authenticity, personality and careful investment, where customers wanted to feel good about every aspect of what they're wearing; from its manufacturing to its Instagram-worthy credentials.



HOW WE WORE DENIM IN 2017

Skinny, slouchy, straight, boot-cut or cropped: nothing was more essential to the wardrobe of 2017 than a good pair of jeans. In womenswear, skinny jeans are the most popular style and the best-selling colour is black, closely followed by indigo. Men favour a straight leg style, but skinnies are working their way up the style stakes, with sales rising 25% compared to last year. In response to the UK's denim obsession, we introduced and/or, our first in-house denim lifestyle brand for women, designed to complement a range of versatile womenswear, shoes, accessories and lingerie.

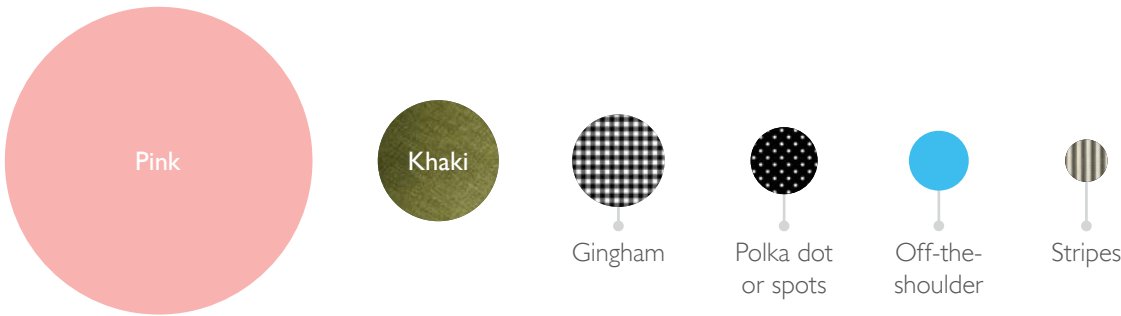


WHO AND WHAT INFLUENCED STYLE IN 2017?

Many of this year's top trends came from social media, with bloggers, Instagrammers, YouTubers and Pinners showing off what they're wearing "in real life". As a result, customers are increasingly sceptical of brands trying to sell over-the-top perfection or unrealistic ideals.

By examining the trends in search terms on JohnLewis.com, we can pinpoint who some of the influencers were behind this year's strongest looks.

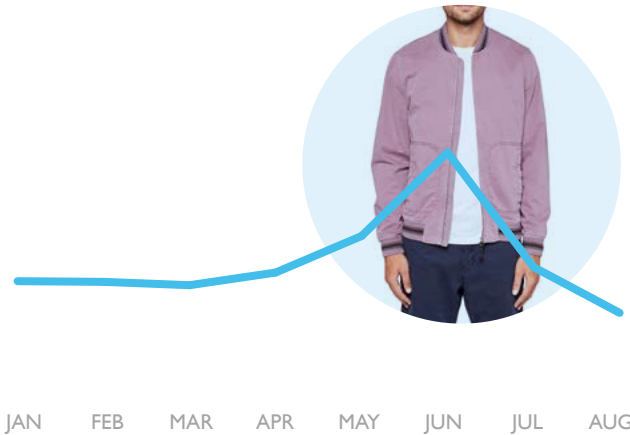
Trends in order of popularity:
Sized by total searches for each key trend



PINK

Pink was hugely popular in menswear and womenswear. Sales of pink women's jackets increased by 55% compared to last year and in menswear pink t-shirts increased in sales 74% and pink shirts were up 39%.

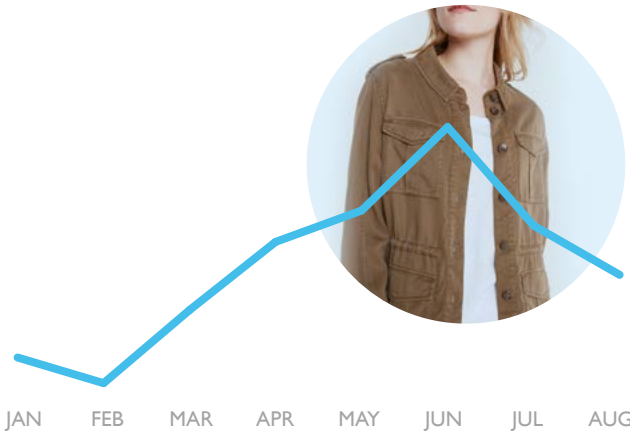
- From January to March, a host of male and female influencers wore Millennial Pink, including **Drake**, **ASAP Rock** and **Beyoncé** (3,747,095 likes).
- Rihanna** wore a Millennial Pink floaty dress to the July premiere of her film, *Valerian* (1,904,503 likes)



KHAKI

Khaki t-shirts were among our top twenty best sellers in autumn. The trend continued into the summer, with searches for khaki peaking in June.

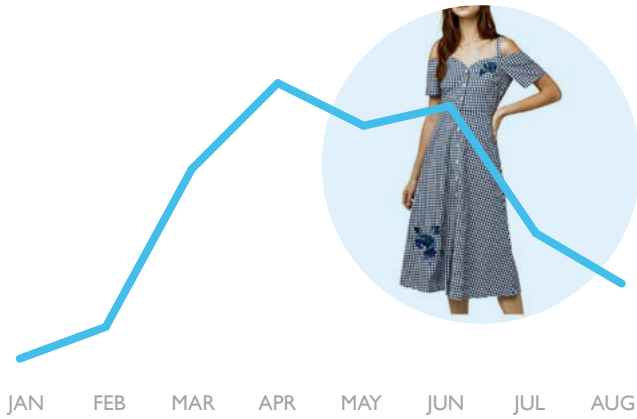
- Singer **Mollie King** wore the AND/OR parka on Instagram in April and we saw a 500% increase in mobile traffic to our site
- In June, **Angelina Jolie** gave a speech at the International Peace Support Training Centre wearing a khaki suit (106,613 likes)



GINGHAM

Gingham was not just for tablecloths, but found its place in womenswear. Searches peaked in April as one of spring/summer's hottest prints for dresses, skirts and tops.

- Bella Hadid** was the poster girl for gingham, sporting gingham shorts in April (797,632 likes) and gingham heels in May (604,199 Insta-likes)
- Holly Willoughby's** gingham skirt scored 48,646 Insta-likes when she wore it in May to present *This Morning*



POLKA DOT OR SPOTS

Polka dot dresses were the best selling dress of the summer, with searches on JohnLewis.com peaking in June.

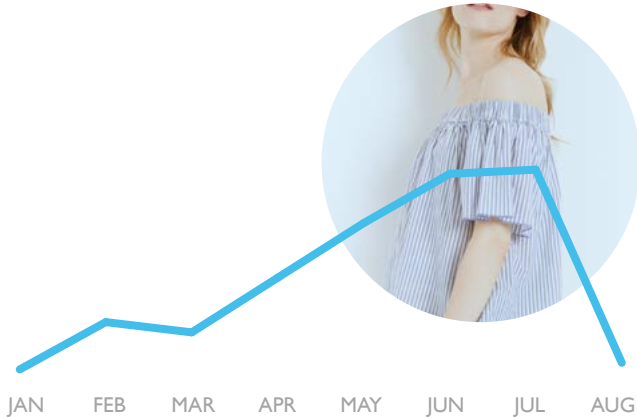
- When **Kate Middleton** sported a polka dot dress for Wimbledon this July @KensingtonRoyal received 68,555 likes



OFF-THE-SHOULDER

Off-the-shoulder tops and dresses in womenswear steadily became one of the key summer looks, with searches on our website peaking in early July.

- Kim Kardashian** posted a photo of her off-the-shoulder white dress from the Met Gala on Instagram in May (1,117,374 likes)
- @KensingtonRoyal posted a picture of **Kate Middleton** in a red off-the-shoulder number in July (89,957 likes)



STRIPES

Stripes were popular for both men and women this year. Long sleeve striped jersey tops were among our top five best sellers in womenswear last autumn/winter. This spring's hottest trousers came with stripes down the side.

- Zoella** wore a striped t-shirt on Instagram in March, which received nearly 580,000 likes
- Rapper **Tinie Tempah** and Instagram influencers **Jordan Bunker** and **Adam Gallagher** all donned stripes this spring/summer



WHAT'S BIG IN BEAUTY

With the explosion in YouTube videos and other widely shared guidance from bloggers and social media, there's little doubt that customers' beauty regimes are becoming increasingly elaborate. Whether they're looking for superfood remedies or aspire to Kylie Jenner's grooming standards, there's a blog or video tutorial to help.

CUSTOMERS ARE SPENDING MORE ON BEAUTY THAN EVER BEFORE

Walk into any John Lewis and you'll find yourself surrounded by a wide choice of enticing beauty products. But in 2017, beauty regimes are a much more sophisticated affair than ever before, as demand for skincare and makeup products expands significantly. In recognition of this, we invested £9m refurbishing some of our key beauty halls across the country in 2016, and introduced Charlotte Tilbury into eight additional stores and MAC into six new locations.

Smelling good is also high on the agenda, with a surge in customers wanting to upgrade to new, interesting fragrances at the top end of the market.

- Sales of premium fragrances are up over 35% compared to last year, with Chanel, Creed, Tom Ford and Hermes among the most sought after options.

So it appears that the "lipstick effect" which results from economic uncertainty is also being accompanied by a "premium perfume effect" with customers choosing to spend more on perfume as a luxurious pick-me-up.

FIVE YEAR FLASHBACK:

In 2013, beards were just starting to gain popularity and we introduced our first beard oil. Today, we stock over 20 beard care products.



#SHEETMASK SELFIES BECAME A "THING"

But why has makeup and skincare become such an important part of how we look? Social media has paved the way for customers to share their beauty regimes with the world, decoding the mystery behind makeup through 'Get Ready With Me (GRWM)' videos. Celebrities including Victoria Beckham, Emma Stone, Drew Barrymore and Jessica Chastain all lifted the curtain on their beauty preparations with a #sheetmaskselfie. Consequently, sheet masks have been a huge best seller, (#sheetmask has over 200,000 tags on Instagram).



THE GROWING TREND FOR "FACE FOOD"

Cranberries, tumeric, broccoli and avocado: superfoods are not only popular on plates and in smoothies, they are increasingly finding their way into our skincare products. As the beauty industry explores their miraculous properties, here are some examples of their star ingredients.

BROCCOLI

Elemis superfood facial oil, which contains broccoli, flax seed and daikon radish to feed and nourish the skin, was our second best selling seasonal launch

COCONUT

The newly launched Marc Jacobs Coconut Primer already features among our best-selling primers

CHARCOAL

Origins Charcoal Mask is designed to clear pores. It has increased in sales 11% compared to last year

COFFEE BEANS

Among our best selling sheet masks, the Origins GinZing mask contains coffee beans and ginseng to boost energy levels as well as skin's moisture

AVOCADO

Kiehl's Olive Fruit Oil shampoo and conditioner blends avocado oil with lemon extract and olive fruit oil for healthy, lustrous locks. It saw a 34% increase in sales

CRANBERRY

Liz Earle Superskin eye cream, which contains rosehip and cranberry seed oils, is among our top 20 best sellers

TURMERIC

The star ingredient of the newly launched Clarins Double Serum is turmeric, which is known for its anti-aging properties

POMEGRANATE

The Jo Malone Pomegranate scent features pomegranate, raspberry and plum juices. It saw a 65% increase in sales this year

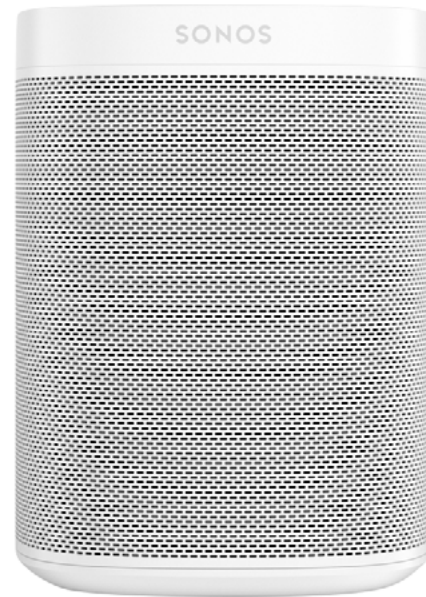
LOOKING AHEAD

What will our world look like in 2018? We predict customers will seek home style inspiration from Japan, men's shirts will grab attention and increasingly our tech will respond to our voices.

1

WE'LL TALK TO OUR TECH

Google Home and Amazon's Alexa brought a new era of voice control to houses in 2017. In 2018, we'll see voice activated assistants become even more common, with the Sonos voice controlled smart speaker coming soon



2

COFFEE WILL GET PERSONAL

Coffee machines are getting to know their owners and their individual preferences for flavour, strength and temperature, storing family member or housemate preferences so everyone can wake up to their dream caffeine fix.

3

PRINTS WILL GET WILD

There's a rumble in the jungle, as 2018 is expected to be the year that snakes, monkeys, toucans and other tropical animals feature heavily on fabrics, walls and furnishings.



4

WE'LL TURN TO JAPAN FOR INSPIRATION

The preference for multi-functional rooms is here to stay, but next year inspiration will come from Japan, a country that has mastered the art of beautifully designed, minimalist living.



5

MEN'S SHIRTS WILL MAKE A STATEMENT

2018 is tipped to be a year of even brighter colour and quirky prints in menswear, with a predicted growth in "conversational" short-sleeve shirts of 30%.

6

LIPS WILL GO TWO-TONE

This year, we saw strong sales of blue lipsticks so we know customers aren't afraid to try a bold look. Next year, we'll see the appearance of two tone lips: with clashing colours on upper and lower lips for a standout pout.



2017

2016

2015

2014

Want to know more?

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