

Top of the shops

In our survey of Britain's favourite high-street shops, we reveal who's winning and losing when it comes to satisfying the customer

High-street stores are having to battle harder than ever for your business – particularly with consumers tightening the purse strings under threat of rising household costs and growing debts. And with online competition growing at record levels (see *Which?*, November 2006, p16), it would seem that the best way for shops to win the fight is to keep customers happy.

Our survey has looked at 50 of the best-known retailers, and there are some surprising results. Some of Britain's best-known high-street names, such as Currys, Woolworths and MFI, are rated poorly, while stores such as Aldi and Lidl are on the rise – thanks in large part to their discount pricing policy. However, two particular shops stand head and shoulders above the rest.

On the podium

John Lewis and Waitrose, sister companies in the John Lewis Partnership, take the gold and silver in our survey. Both were ten points or more ahead of their nearest rivals (see 'Using the tables', p13, for details). 'John Lewis isn't perfect, but very close to it,' was how one reader saw this year's winner.

John Lewis also came in the top three in our survey for shopping experience (which includes tidiness, ease of finding products and general environment), customer service and product (including range and quality). One customer described the store as 'like an old blanket; comfy and reliable'.

However, on the downside for John Lewis, convenience can be an issue for some customers. One respondent to our survey said: 'The only problem [with John Lewis] is that there is no store near where I live.'

They may have a point. With just 27 stores nationwide, it can mean a bit of a hike to find your nearest one. The good news is that the company has announced plans to open a further 11 by 2013.

Just a fraction behind John Lewis for overall satisfaction was Waitrose. Among our members, it beats all other stores for its customer service and products (for more on grocery retailers, see p14).

Third place goes to Marks & Spencer. The chain store, whose fortunes have taken an upswing recently, performed well for its customer service and products, with over half of its customers rating its products very good or excellent. Independent electrical specialists come in joint fourth with bookshop Waterstone's and Body Shop.

However, our top five, with the exception of John Lewis, all stumble on pricing. For example, only 18 per cent of members rate Body Shop's pricing very positively. Perhaps this is why discount supermarkets Aldi and Lidl have smashed into the top ten and why budget homeware store Wilkinson sits just outside at number 11.

Looking for a bargain

Unsurprisingly, the discount stores all do remarkably well in terms of price in our survey. In the case of Aldi and Lidl, more than



TOP 50 UK RETAILERS		CATEGORIES (%)					OVERALL SATISFACTION (SCORE 0-100)
		PRODUCT	CONVENIENCE	CUSTOMER SERVICE	PRICING	SHOPPING EXPERIENCE	
1	JOHN LEWIS (879)	75	51	67	52	63	81
2	WAITROSE (439)	77	61	71	22	58	80
3	MARKS & SPENCER (879)	56	50	49	24	39	70
4	LOCAL ELECTRICALS (438)	44	43	70	30	40	68
=	WATERSTONE'S (439)	66	45	53	21	42	68
=	BODY SHOP (438)	55	39	53	18	43	68
7	ALDI (160)	32	43	25	78	22	66
8	LIDL (438)	26	39	13	80	16	64
=	JESSOPS (438)	52	39	48	28	29	64
10	IKEA (439)	48	41	21	51	22	63
11	WILKINSON (230)	39	37	19	61	11	62
12	CLARKS SHOES (439)	39	37	31	20	33	61
=	SAINSBURY'S (439)	45	62	34	25	26	61
14	MILLETS (438)	28	33	33	26	28	60
15	NEXT (438)	34	39	24	27	24	59
=	MOTHERCARE (141)	40	38	38	14	38	59
=	DFS (214)	38	46	42	41	48	59
=	PRIMARK (439)	24	28	9	72	10	59
=	CARPHONE ^a (439)	50	44	42	36	29	59
20	TESCO (878)	40	73	25	42	25	58
=	ASDA (1,313)	31	64	27	56	23	58
=	B&Q (439)	44	57	30	25	15	58
=	HABITAT (438)	28	27	22	11	32	58
24	BOOTS (439)	42	39	26	21	21	57
=	ARGOS (877)	50	44	15	38	23	57

Sample size in brackets a The Carphone Warehouse

ILLUSTRATION CHRIS WADDON PHOTOGRAPHY GETTY IMAGES



TOP 50 UK RETAILERS	CATEGORIES (%)					OVERALL SATISFACTION (SCORE 0-100)
	PRODUCT	CONVENIENCE	CUSTOMER SERVICE	PRICING	SHOPPING EXPERIENCE	
= TK MAXX (191)	24	34	8	53	3	57
= ICELAND (147)	29	37	20	51	19	57
= HOUSE OF FRASER ^b (439)	44	36	33	17	31	57
29 NETTO (110)	14	42	16	75	11	56
= MORRISONS (439)	38	51	27	38	22	56
31 HMV (439)	53	37	31	19	20	55
= DEBENHAMS (439)	34	35	18	26	20	55
= VIRGIN MEGASTORE (439)	51	37	30	19	23	55
34 PHONES4U (104)	45	35	41	34	31	54
= HALFORDS (439)	34	43	21	14	21	54
= SUPERDRUG (439)	37	35	10	43	14	54
37 MATALAN (303)	20	31	9	47	9	53
38 HOMEBASE (439)	26	51	16	17	17	52
= BHS (438)	19	29	16	27	18	52
40 WH SMITH (439)	27	30	16	10	17	51
= COMET (439)	29	38	13	22	23	51
42 CO-OP (311)	18	65	23	24	19	49
43 PC WORLD (439)	30	42	11	15	21	48
= WOOLWORTHS (438)	17	35	12	30	11	48
= MFI (412)	18	40	18	26	29	48
46 CURRYS (439)	25	39	12	16	23	47
47 BARRATTS SHOES (114)	14	21	12	26	20	46
= SOMERFIELD (185)	15	52	15	20	18	46
49 CURRYS.DIGITAL (439)	22	33	13	13	19	45
50 JJB SPORTS (182)	22	29	9	24	9	44

Sample size in brackets ^b Including Beatties, Jenners

three quarters rate pricing as very good or excellent (for more on discount supermarkets, see p14). While customer service and shopping experience all rate below many other top performing retailers in our survey, the very appearance of these discounters in the upper regions of our table means that many of you are willing to accept the no-frills approach – if the price is right.

Being cheap doesn't necessarily breed success, however, as other discount stores such as supermarket Netto have failed to win over our members to the same extent.

Bottom of the barrel

At the bottom of our satisfaction table is sporting goods store JJB Sports. One cus-

tomers described shopping trips there in less-than-glowing terms: 'The visits were poor experiences, shops were crowded and messy, clothes on the floor and staff unknowledgeable about stock and its location.' Indeed, the sportswear giant gains low scores in all our key areas, including one of the lowest customer service ratings – just 9 per cent of you judged it to be excellent or very good.

It's also bad news for the Dixons Stores Group, parent company of PC World, Currys and Currys.digital (formerly Dixons). All three shops came in the bottom eight of our survey (for more on electricals, see p15).

And some of our most familiar high-street names find themselves at the wrong end of the table – Barratts Shoes, Somerfield, MFI, Woolworths and Co-op all finish in the bottom ten of our table, which proves that history and longevity are no substitute when your customer service and products are viewed as being below par.

USING THE TABLES

On all tables – top 50 retailers (p12), top 12 grocery retailers (p14) and top nine electrical retailers (p15) – the overall satisfaction mark is based on two questions asking about the overall rating of the store and the likelihood of recommending the shop to a friend. The scores given are marks out of 100. For all other aspects, scores are the percentage of customers rating stores as excellent or very good.

Product Includes quality, range, stock and, for electrical goods only, durability.

Convenience Includes both opening times and location.

Customer service Includes knowledge, availability and helpfulness of staff and after-sales service.

Pricing Includes regular price, sales and special offers.

Shopping experience Includes ease of finding products, tidiness, environment, child-friendliness and queuing time.

OUR RESEARCH

In October 2006, we surveyed 10,655 Which? online panel members. We asked them to assess overall satisfaction with two stores at which they shop from a list of 50 of the best-known high-street shops. We also asked them to judge satisfaction on five separate retail aspects (see 'Using the tables', left). Based on the answers, we compiled the top 50 high-street stores and the top grocery and electrical shops. If a retailer is active in more than one sector, we rate each sector separately. We also asked about self-service tills (p16).

Supermarket sweep

Our survey reveals the rise of the discounters Aldi and Lidl as they beat the big four – Tesco, Asda, Sainsbury's and Morrisons

The big winners in our survey of your favourite grocery stores are two British institutions Waitrose and Marks & Spencer.

One customer explained the reasons for Waitrose's success succinctly: 'The stores are well organised and immaculately clean. Staff are treated well and, as a result treat the customers well.'

Waitrose was way ahead of its rivals in terms of customer service, with 71 per cent of customers rating it very good or excellent. The 103-year-old grocery store also polled well for the products it sells, with more than three quarters rating them very good or excellent. One member told us: 'The food is excellent and the fresh produce is outstanding, but they're maybe a little expensive on everyday items.'

Second-placed Marks & Spencer also did well in these categories.

Waitrose wasn't quite up there with market leader Tesco for convenience, but as one member told us: 'The nearest Waitrose to us is 25 miles away but compared with Clacton Tesco, it's like walking into heaven.'

With Waitrose and Marks & Spencer both faltering on pricing, the path has been left free for the rise of German discount supermarkets Aldi and Lidl, which opened their first UK stores as recently as 1990 and 1994 respectively. With one reader describing Lidl as 'the economy of economy supermarkets', it seems many of you are warming to the opportunities of low-cost grocery shopping.

In terms of price they blow the competition away – 78 per cent of Aldi and 80 per cent of Lidl customers rate them either excellent or very good on this. As one Aldi customer told us: 'You might not recognise the brands, but the price attracts you to try them. So far the results have been first class.'

They are way behind some other supermarkets in areas such as convenience, customer service and product – Lidl is bottom

of our grocery store table for customer service; however, our survey suggests that many of you are willing to forgo certain luxuries for a bargain. (For an in-depth report on discount supermarkets as well as supermarket shopping online, read next month's *Which?*.)

The big four

None of the big four – Sainsbury's, Tesco, Asda and Morrisons – actually makes it into the top four. But Sainsbury's wins out for overall satisfaction. While it ranks third in terms of market share, it scores just ahead of the other three for customer service and shopping experience. Market leader Tesco comes top for convenience and joint-top for its products. Morrisons brings up the rear in terms of overall satisfaction in the battle between the big four.

Down the chart

Somerfield is bottom of our survey of grocery retailers, doing poorly in all categories except for convenience.

One of the customers described the experience as 'drudgery'.

Another tells us: 'Sometimes I shop at Somerfield through gritted teeth.'

Despite doing well for convenience, the Co-op left many customers far from impressed (although many consumers recognise the Co-op as a single brand, there are in fact around 40 different co-operative companies retailing in the UK). This former high-street giant did particularly badly in our survey for customer service, products, pricing and shopping experience, with one reader describing it as 'a place to suffer'. However, shoppers did rate the Co-op highly for its ethical trading policies.

As with our main retailer survey, two stores are way ahead of the pack in terms of overall customer satisfaction but the discount retailers are pushing them hard with their enticingly low prices.



Waitrose (left) ranked top of the grocery shops. Aldi (above) and Lidl (below) have seen their pricing policy push them right up the table



GROCERY RETAILERS	CATEGORIES (%)					OVERALL SATISFACTION (SCORE 0-100)
	PRODUCT	CONVENIENCE	CUSTOMER SERVICE	PRICING	SHOPPING EXPERIENCE	
WAITROSE (439)	77	61	71	22	58	80
MARKS & SPENCER (440)	68	52	51	18	40	73
ALDI (160)	32	43	25	78	22	66
LIDL (438)	26	39	13	80	16	64
SAINSBURY'S (439)	45	62	34	25	26	61
TESCO (439)	45	71	27	38	23	59
ICELAND (147)	29	37	20	51	19	57
ASDA (439)	39	64	31	49	20	57
NETTO (110)	14	42	16	75	11	56
MORRISONS (439)	38	51	27	38	22	56
CO-OP (185)	16	69	23	22	17	47
SOMERFIELD (185)	15	52	15	20	18	46
SECTOR AVERAGE	42	55	33	40	27	62

Sample size in brackets

Bright sparks and low lights

A shock for the big chains and victory for John Lewis and local dealers in our survey of electrical retailers

The message from our survey is clear. If you want to buy an electrical product, stick to John Lewis and independents, and steer well clear of the large chains. Currys.digital, Currys and Comet all do poorly in our survey. Customer service was a particular problem, only one in eight rate each of these stores either excellent or very good. They also score below par for their prices.

Having been kept off the bottom spot by JJB Sports in our overall survey (p12), Currys.digital takes last place in our electrical retailers' poll. One reader described shopping there as 'an act of desperation', while another brands the sales staff as 'over-persistent and over-confident and especially keen to sell insurance'.

Currys was also criticised by some of our members. One said: 'The staff were more interested in talking to each other than in helping customers.'

At the other end of the table, it's business as usual for John Lewis. As in the overall survey of top 50 retailers (p12), the store is way ahead of its competitors. Local independent electrical specialists also get the thumbs up for overall satisfaction, and top our table for customer service, with 70 per cent of shoppers rating them either excellent or very good. As one customer put it: 'It is the only place to find certain items that no one else sells and staff have excellent specialist knowledge on its products.'

In our groceries survey, the Co-op came second from bottom for overall satisfaction. However, for electrical items, its results are more encouraging, moving it up to third place in our table.

Tesco and Asda have both increased their range of electrical items in recent years, yet they have a way to go before they top the likes of John Lewis and the local electricals. However, longer opening hours and more stores help contribute to the supermarkets earning the top two ratings among electrical retailers for convenience. Both shops also finish in the top two places for price.

It seems that when it comes to electrical retailers, our survey shows that the most satisfied shoppers are those getting the best customer service – a fact that Currys and Comet would do well to take on board.



Our survey shows that the most satisfied shoppers are those getting the best customer service

ELECTRICAL RETAILERS	CATEGORIES (%)					OVERALL SATISFACTION (SCORE 0-100)
	PRODUCT	CONVENIENCE	CUSTOMER SERVICE	PRICING	SHOPPING EXPERIENCE	
JOHN LEWIS (439)	73	53	67	55	64	81
LOCAL ELECTRICALS (438)	44	43	70	30	40	68
CO-OP (126)	34	37	27	37	28	60
ARGOS (438)	49	47	16	42	23	58
TESCO (439)	22	79	18	56	31	56
ASDA (436)	18	69	24	61	27	55
COMET (439)	29	38	13	22	23	51
CURRYS (439)	25	39	12	16	23	47
CURRYS.DIGITAL (439)	22	33	13	13	19	45
SECTOR AVERAGE	36	50	30	37	31	58

Sample size in brackets

SHARE YOUR EXPERIENCES

We'd like to hear about your experiences of high-street shopping. Are you satisfied with the service or are you left fuming at the checkout? Please email your stories to letters@which.co.uk or write to us at: **Which?, PO Box 44, Hertford X SG14 1SH.**

Customers are warming to the charms of self-service scanners



(Above) Local electricals top the chart for customer satisfaction while Currys.digital (left) is bottom of our table of electrical retailers

Are you being self-served?

Self-service tills and scanners are supposed to make shopping quicker and easier. We asked members for their views

Self-service scanners and tills are becoming more and more prominent in many of the major supermarket chains. And we wanted to know what our members thought of them. From our survey, it would seem that customers are warming to their electronic charms. Our survey found that around half of respondents have used a self-service till. And, encouragingly, more than three quarters of those would use them again.

Many users also get a kick out of trying something new. According to our survey, 52 per cent of members agreed that it was exciting to try out new technology such as scanners.

However, when the thrill of the new wears off, the key to the success of self-service tills will be whether they make shopping more convenient. The early signs are generally good.

While over quarter of users feel that it puts them more in control, an impressive 63 per cent believe that the new technology does speed up shopping.

And 27 per cent even believe that scanners make shopping more fun.

Is it safe?

In October last year, we reported a security hole in self-service tills at Tesco (see 'Tesco self-scan tills open to card fraud', *Which?*, October 2006, p5). Customers could pay for their goods using their debit or credit card without having to sign or enter their Pin.

Several angry readers told us that they'd had their cards copied and had had money taken. The good news is that since we reported this, Tesco has been busy rolling out chip and Pin to all of its self-service tills.

Seven out of ten of you rate Waitrose top for customer service

The way we were

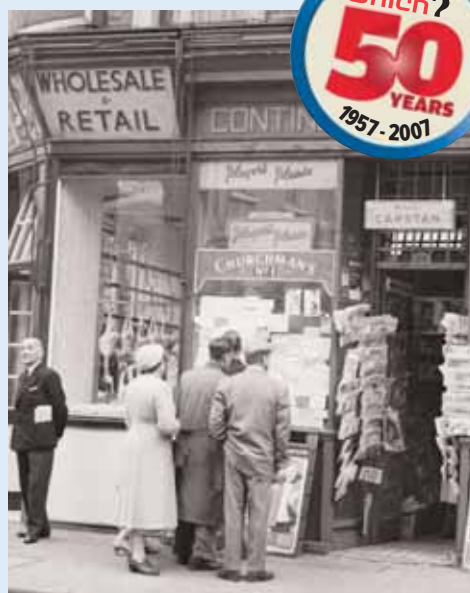
The changing face of the high street

When *Which?* was launched 50 years ago, Britain was in the midst of a consumer revolution. Post-war food rationing had come to an end in 1954, disposable incomes were rising, and for the first time, big electrical items such as fridges and even televisions were beginning to find their way into our households.

Since the fifties, there has been an unprecedented transformation in our buying habits and the high street in general. One of the major differences 50 years ago was the dearth of supermarkets. At the time, most food was sold loose and you could buy what you wanted.

Britain was first introduced to self-service stores in the fifties. They were based on an American innovation where shoppers would select goods instead of having an assistant do it. The first UK supermarket Premier opened in Earls Court, London in 1951.

Indeed, when a new store opened, it was big news. In November 1950, around 8,000 people queued for the reopening of Woolworths'



Plymouth branch – although if you look at the 6,000-strong throng that greeted the opening of the new Ikea in Edmonton in early 2005, can we say things have really changed that much?

For *Which?* members' shopping memories, turn to p74.

STORE WARS

The highest and lowest scorers of our survey

PRODUCT



Waitrose

With 77 per cent rating it as either excellent or very good, Waitrose is top for availability, range and quality of its products.



Barratts/Netto

The shoe shop and discount supermarket are bottom, with only 14 per cent rating their products excellent or very good.

CONVENIENCE



Tesco

Britain's largest retailer is top for convenience – not all that surprising, really.



Barratts

Not only is it joint bottom of the chart for product, Barratts also ranks lowest for convenience.

CUSTOMER SERVICE



Waitrose

Seven out of ten rate Waitrose top for customer service.



TK Maxx

With just 8 per cent judging it either excellent or very good, TK Maxx ends up bottom for customer service.

PRICING



Lidl

Eight out of ten rated the discount supermarket either excellent or very good on price.



WH Smith

Looking for a bargain? You might want to avoid WH Smith – only 10 per cent saw it as excellent or very good on price.

SHOPPING EXPERIENCE



John Lewis

Way out ahead of its rivals, 63 per cent rated the John Lewis shopping experience as very good or excellent.



TK Maxx

As a shopping experience, the discounters came out bottom in our survey. 'It's a bit like [shopping in] a jumble sale', said one member.