QUIZ

CAPITAL MARKETS DAY

21 June 2018

PRESENTING TEAM

EXPERIENCED SENIOR MANAGEMENT

PETER COWGILL
NON–EXECUTIVE CHAIRMAN

TARAK RAMZAN
CHIEF EXECUTIVE OFFICER

GERARD SWEENEY
CHEIF FINANCIAL OFFICER

SHERAZ RAMZAN
CHIEF COMMERCIAL OFFICR

OMAR AZIZ
RETAIL OPERATIONS DIRECTOR

HAROUN SALEEMI
HEAD OF E-COMMERCE

LESLEY MORTON
HEAD OF MARKETING

KAREN DOUGALL
HEAD BUYER

HARRY BUTT
HEAD OF MENSWEAR

KEITH AUSTIN
INTERNATIONAL

INTRODUCTION

Peter Cowgill

WELCOME TO QUIZ'S CAPITAL MARKETS DAY

AGENDA

TIME	TOPIC	PRESENTER
14:30 – 14:40	WELCOME & INTRODUCTION	PETER COWGILL
14:40 – 14:50	STRATEGIC VISION	TARAK RAMZAN
14:50 – 15:10	FINANCIAL STRENGTHS & KPIs	GERRY SWEENEY
15:10 – 15:30	BRAND & MARKETING	LESLEY MORTON
15:30 – 15:50	PRODUCT & BUYING	KAREN DOUGALL & HARRY BUTT
15:50 – 16:00	Q&A	
16:00 – 16:10	BREAK	
16:10 – 16:30	UK RETAIL	OMAR AZIZ
16:30 – 16:50	INTERNATIONAL EXPANSION	KEITH AUSTIN
16:50 – 17:10	ONLINE GROWTH	HAROUN SALEEMI
17:10 – 17:30	Q&A	
17:30 – 19:30	Smiths of Smithfield *67-77 Charterhouse St, Clerkenwell, London, EC1m 6HJ*	

THE DRIVERS OF OUR OPPORTUNITIES

ESTABLISHED AND DISTINCTIVE BRAND

SIGNIFICANT AND GROWING FAST-FASHION MARKET

OMNI-CHANNEL FLEXIBILITY

CLEAR INTERNATIONAL OPPORTUNITIES

STRONG FINANCIAL TRACK RECORD

SKILLED, PASSIONATE AND DEDICATED MANAGEMENT TEAM

SENIOR MANAGEMENT TEAM

TARAK RAMZAN
Founder &
Chief Executive Officer

SHERAZ RAMZAN
Chief Commercial Officer

OMAR AZIZ
Retail Operations Director

GERRY SWEENEY
Chief Financial Officer

PRODUCT

BUYING & DESIGN TEAM
Karen Dougall & Harry Butt

HEAD OF MERCHANDISING
Katie Williams

ETHICAL COMPLIANCE MANAGER
Natasha Staddon

GROWTH

HEAD OF INTERNATIONAL
Keith Austin

HEAD OF MARKETING & SOCIAL MEDIA
Lesley Morton

HEAD OF E-COMMERCE
Haroun Saleemi

DISTRIBUTION

HEAD OF RETAIL OPERATIONS
Omar Aziz

HEAD OF DISTRIBUTION CENTRE
Allan More

OPERATIONS

HEAD OF IT
Scott Cottingham

HEAD OF ACCOUNTS
Alex Knox

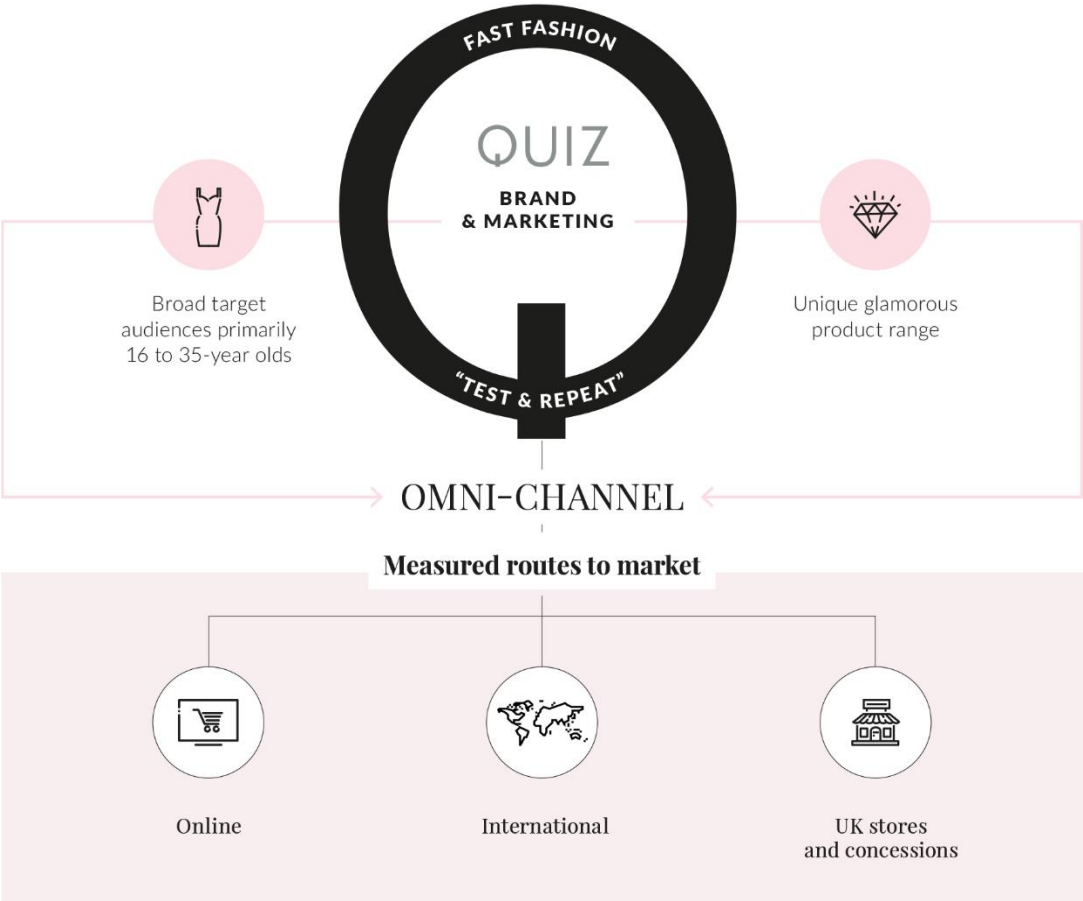
HEAD OF HR
Jason Swandells

STRATEGIC VISION

Tarak Ramzan

QUIZ TODAY

OUR OMNI-CHANNEL FAST FASHION OFFERING



Established and distinctive fashion brand

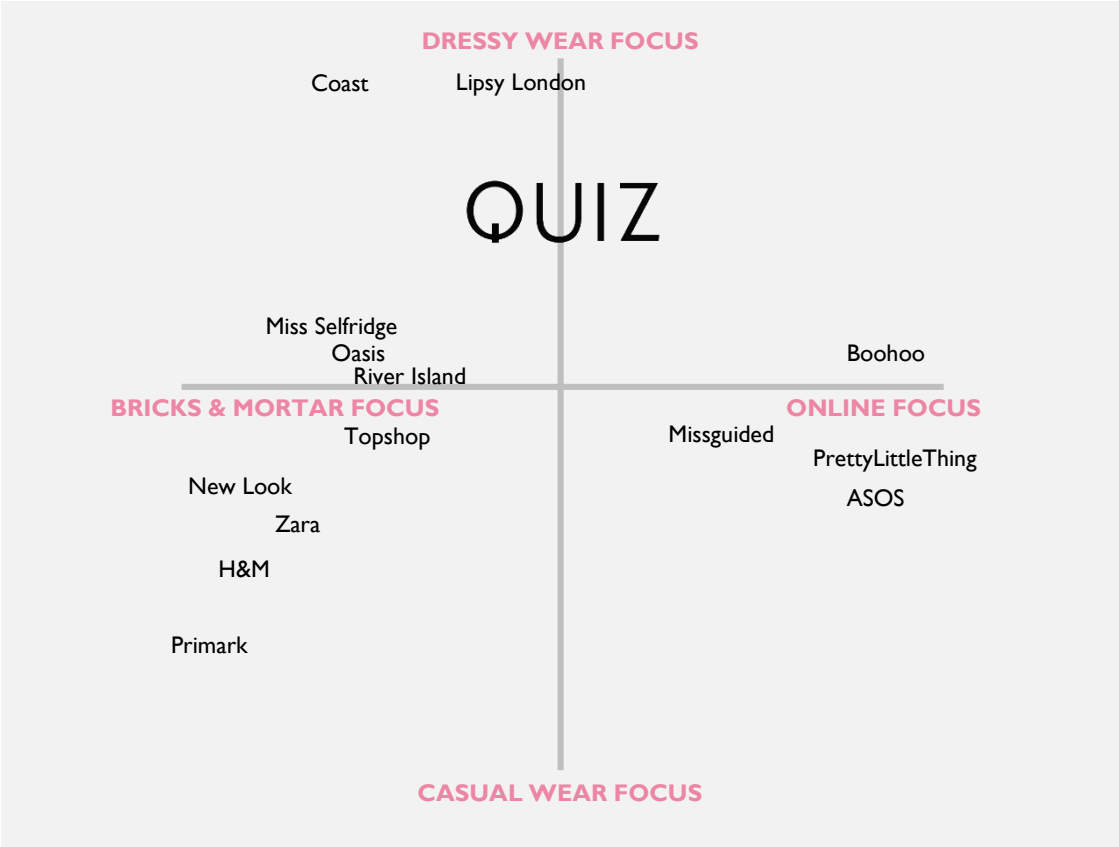
More than **300** standalone stores, concessions, franchise stores across **20** countries

Proven infrastructure and "**test and repeat**" fast fashion supply chain

Employs more than **1,500** people

STRONG & DISTINCT BRAND

OUR VIEW OF THE COMPETITIVE ENVIRONMENT:



Destination brand for evening wear, occasion wear, prom wear and the latest fashion trends

Brand appeals to **broad age range** of women who like to dress up

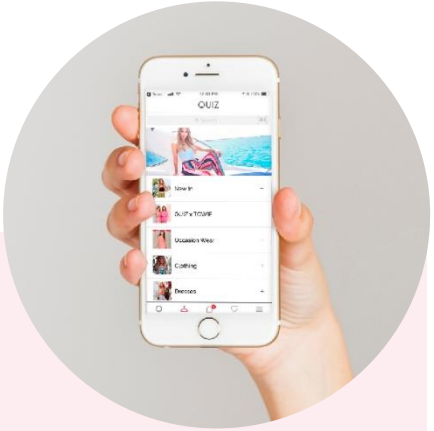
Stands-out on **quality and style**, not just price

Strong brand with clear USP enables **multiple routes** to market

CLEAR GROWTH STRATEGY

STORES & CONCESSIONS

INTERNATIONAL



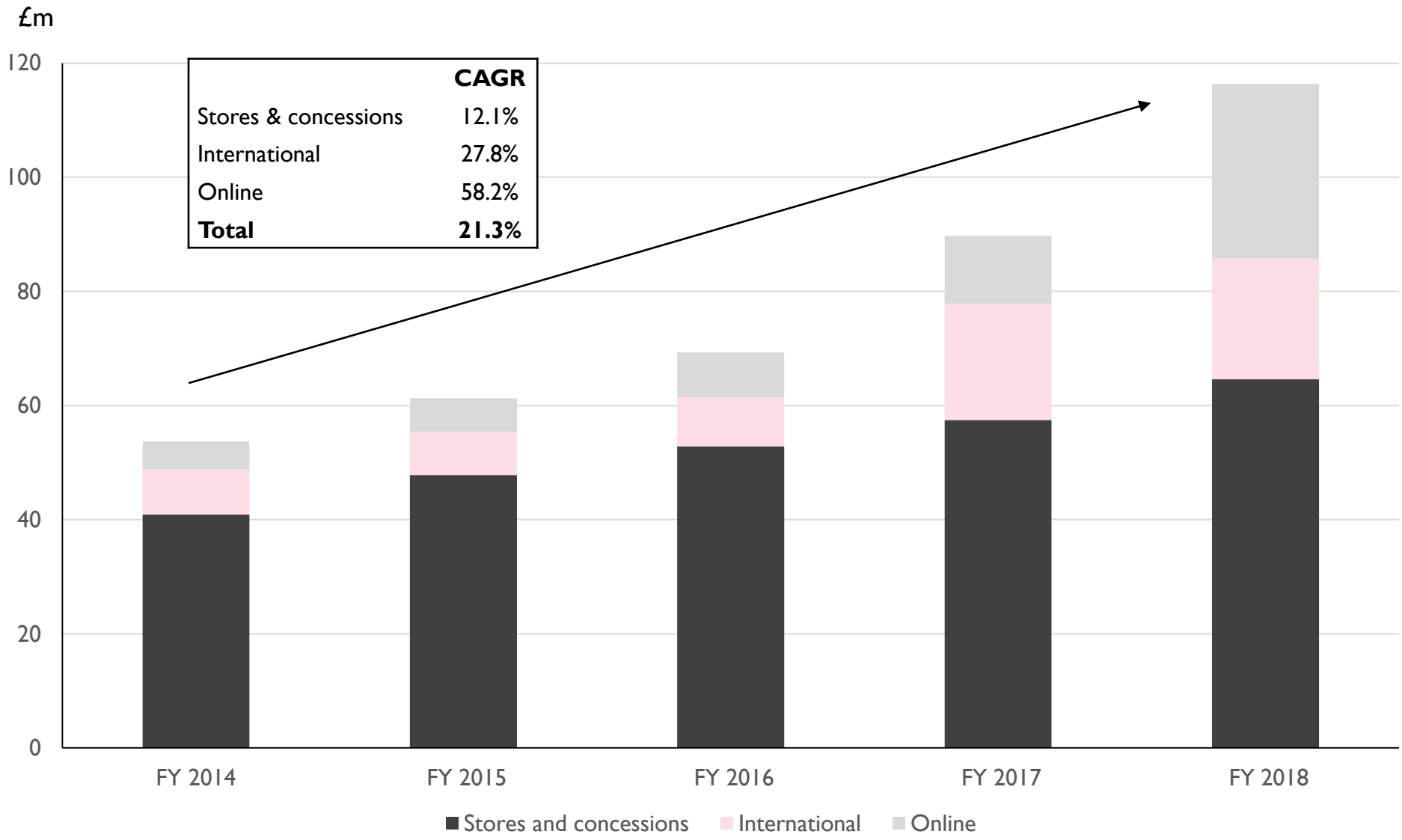
ONLINE

STRATEGIC VISION TO BECOME A GLOBAL OMNI-CHANNEL FAST-FASHION BRAND

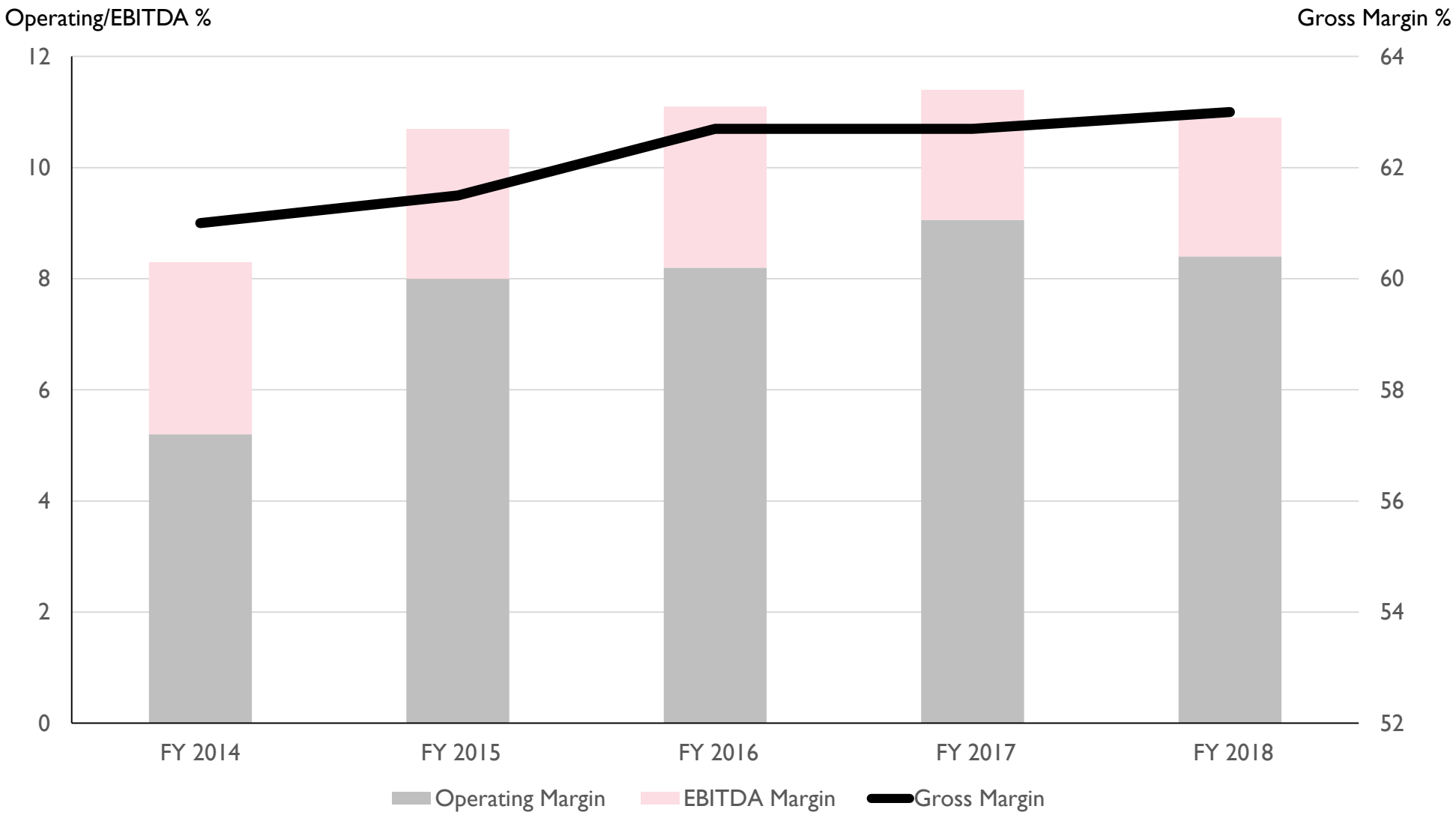
FINANCIAL STRENGTH AND KPIs

Gerry Sweeney

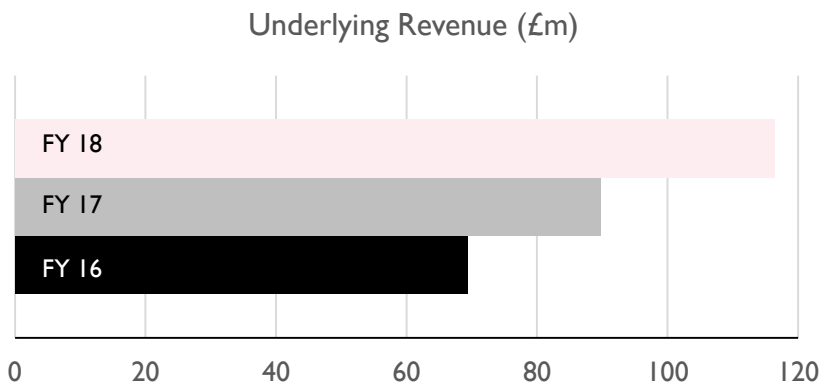
REVENUE GROWTH TRACK RECORD

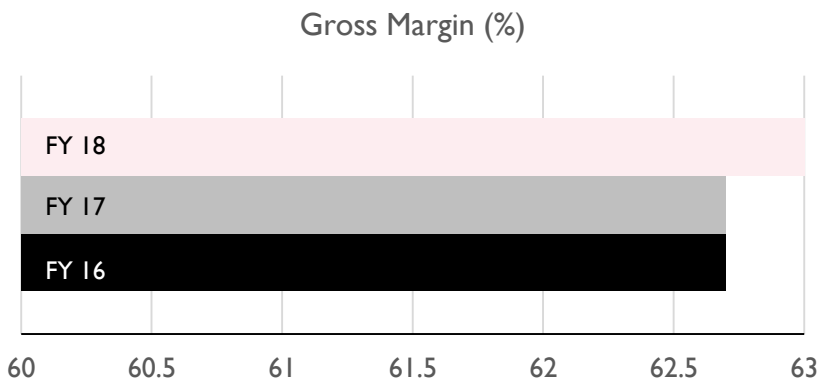


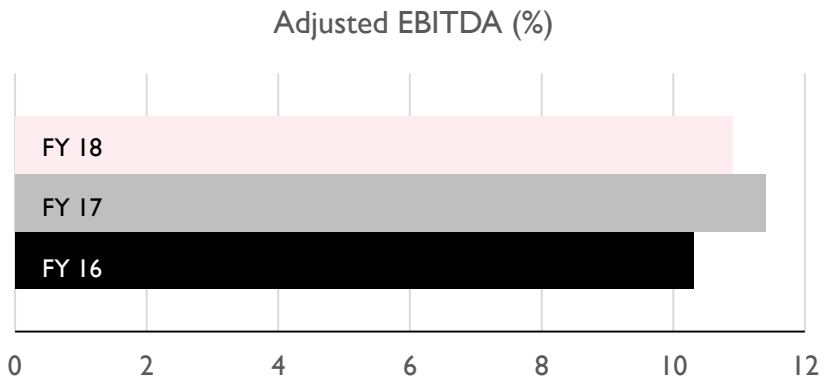
MARGIN ENHANCEMENT

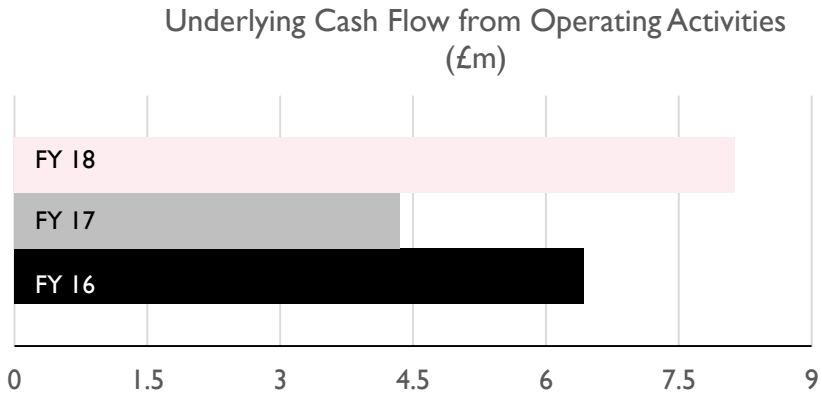


PROGRESS AGAINST FINANCIAL KPIs









INVESTMENT FOR LONG TERM GROWTH

180K SQ. FT. DC NEAR GLASGOW OPENED IN 2016

- Capable of being able to distribute c.450k items to stores each week
- 120k online orders per week based on the current fixed resources and working hours
- Stores receive new styles every working day received by the DC the previous day

OPERATIONAL EFFICIENCY & AGILITY SUPPORT FAST FASHION SUPPLY CHAIN

- Fully integrated ERP & POS system – gives live stock & sales information
- Implementing new CRM system

DE-RISKED FASHION MODEL

- Stock cover of approximately 8 weeks for own stores, concessions and web
- Disciplined pricing policy
- Strict ROI criteria for key investment decisions

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COULD SUPPORT 3x GROWTH IN SALES WITHOUT SIGNIFICANT FURTHER INVESTMENT

- Expanded DC in Autumn 2017; increased space by 40% to 232k sq.ft
- Further space to extend into
- Scope to substantially extend working hours

PEOPLE

- Refurbished and extended head office to accommodate enlarged teams
- Built in-house photography studio for campaign shoots
- Head office of c.33% since IPO

STRONG BALANCE SHEET AND CASH RESERVES

- Business grew by re-investing profits in previous years
- IPO provided cash to accelerate growth plans
- Cash of £9.2m at 31 March 2018 to support future expansion

MANAGING OUR SUPPLY CHAIN

- The ethics of our supply chain is a continual priority for the Group
- We benefit from long-term supplier relationships and the fact that QUIZ does not compete purely on price
- Appointed Ethical Compliance Manager in April 2018 – reporting into the Operational Board
- Responsible for overseeing the suitability of the Company's supply chain and responsible sourcing strategy
- Implemented QUIZ's Ethical Code of Practice and Supplier Manual
    - Committed to operating in accordance with the core principles of the ETI base code
- Focused on ensuring that all products are produced in a safe working environment, sourced responsibly and where workers' rights are respected

BRAND AND MARKETING

Lesley Morton

THE QUIZ BRAND

A very broad age range; cater not just for the 16-35 crowd, but also for the slightly older fashionista who has grown up with QUIZ

Offers quality and value for money products

Occasion driven from race days to proms and weddings to birthday celebrations. QUIZ is synonymous with going "out-out"

We are a destination brand for fashion-conscious women looking to dress for some of the most memorable occasions of their lives…

THE QUIZ QUEENS

OWNED CONTENT:

CUSTOMER SHARED CONTENT:

CUSTOMER PROFILES

16-30 YEARS OLD

- Primarily shops online (mobile first) and on our app
- Very sociable
- Influenced by social media and celebrity world
- Tied to her mobile
- Loves fashion but doesn't stray off the beaten track to find it: favourite bloggers, magazines, TV shows and Instagram are all key to identify new trends and outfits
- Value-driven rather than brand-loyal
- Engaged through social media, digital marketing (mobile-first), influencers, events and partnerships

30+ YEARS OLD

- Has grown up with QUIZ
- Shops online and in store as part of a shopping occasion – e.g. Saturday shopping with kids, lunchtime shopping, or girls days out
- Trend follower, not trendsetter
- Influenced by TV, social media
- More brand loyal but also value-driven
- Engaged in-store, through magazine, press, TV, advertising and social media

CUSTOMER LIFECYLE

AWARENESS

- Celebrity collaborations
- Organic & paid social
- Influencer marketing
- SEO
- Social
- Advertising
- PR
- Paid search – prospecting
- Brand partnership
- Stores
- Third party marketing

ACQUISITION

- B2C events
- Affiliate marketing
- E-Mail marketing
- Competitions – in-store, online and social
- SMS campaigns
- App
- In-store data capture
- In-store magazine

ONBOARDING

- Welcome e-mails
- Abandoned basket campaigns
- Paid search - re-targetting
- social media

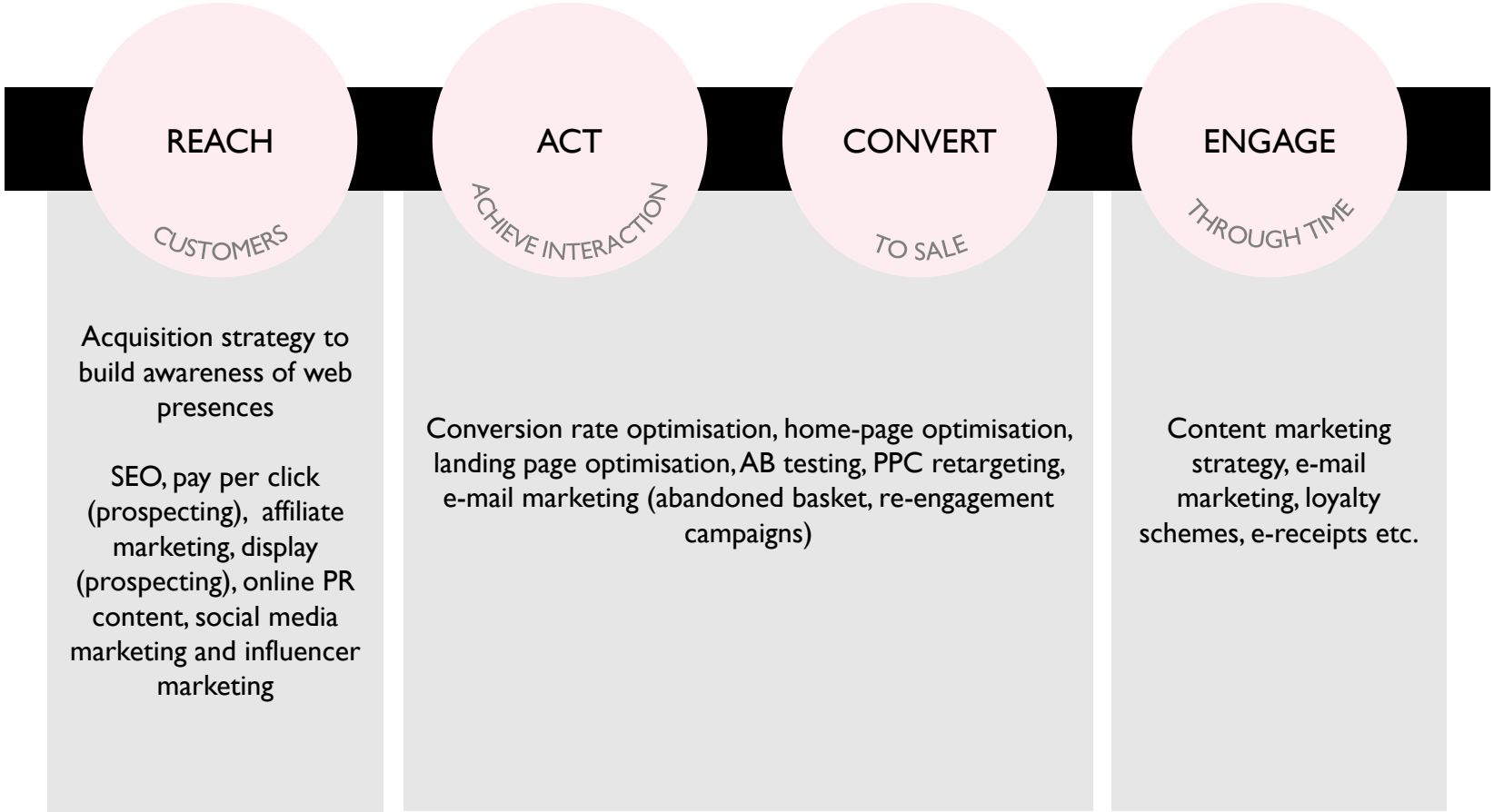
ENGAGEMENT

- Email marketing
- Social Media:
  - Influencer content
  - Ads
  - Stories
- Transactional e-mails
- Abandoned browse campaigns
- Re-engagement e-mails
- Delivery notes
- Landing pages
- Digital lookbooks
- Video content
- Push notifications
- Blogs
- VIP events
- Email receipts

ADVOCACY

- Product reviews
- #QUIZQueen
- Trustpilot
- Loyalty schemes

DIGITAL MARKETING TO SUPPORT ONLINE GROWTH



INFLUENCER MARKETING IMPACT

90%

Of consumers trust peer recommendations

50%

User generated content is 50% more trusted by internet users than traditional media

71%

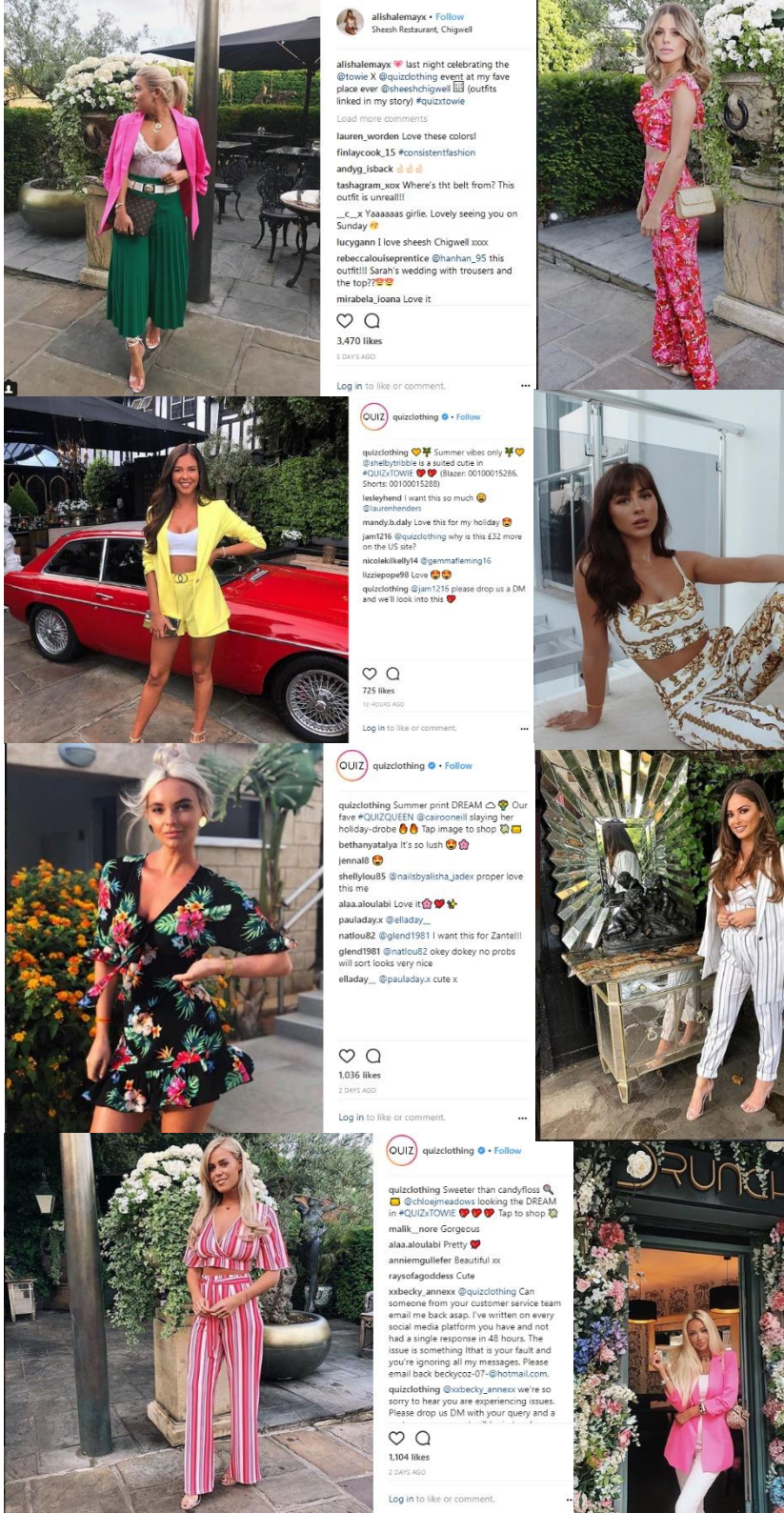
Consumers 71% more likely to make a purchase based on social media referrals

81%

Of US consumers trust advice and information from blogs

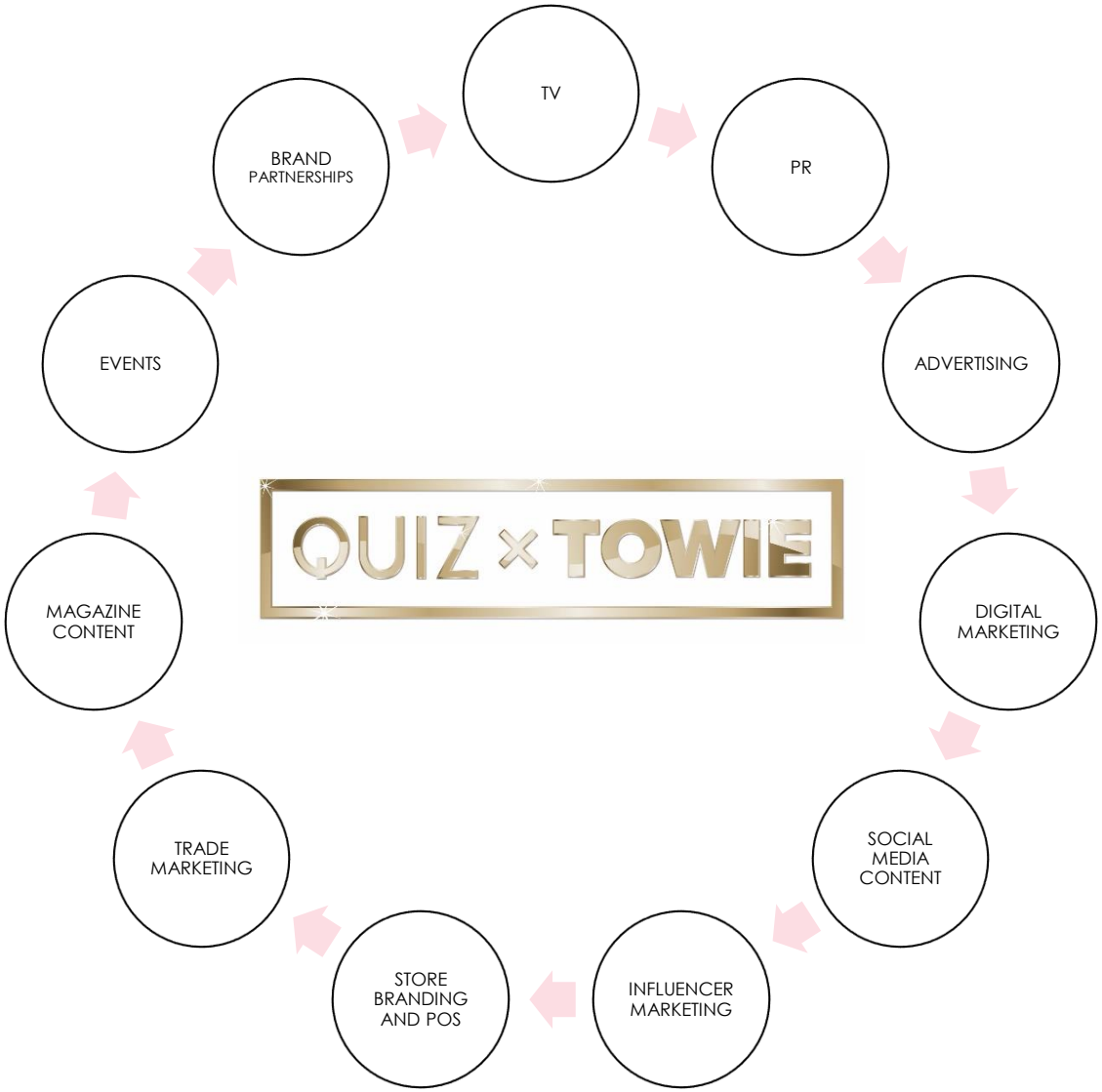
source: Neil Patel

- Outreach **100+** bloggers per week ranging from micro-bloggers with 10k+ followers, to influencers with over 1m followers
- Our hashtag **#quizqueen** allows us to pull this UGC
- The role of influencers:
  - Authenticity
  - Reach
  - Content generation
  - Awareness



QUIZ

CAMPAIGN APPROACH



RESULTS

SOCIAL ENGAGEMENT

9m+ total ad impressions

100,000+ views

13,500 likes

60,000+ views of Instagram Stories

20,000 new Instagram followers

5000+ new searches for QUIZxTOWIE

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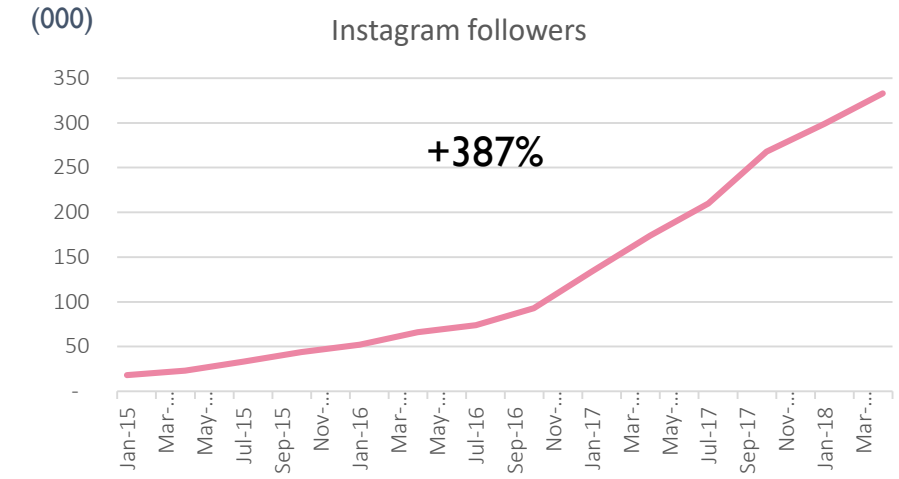
Engagement from launch of QUIZ x Towie on 10th May - 15th June

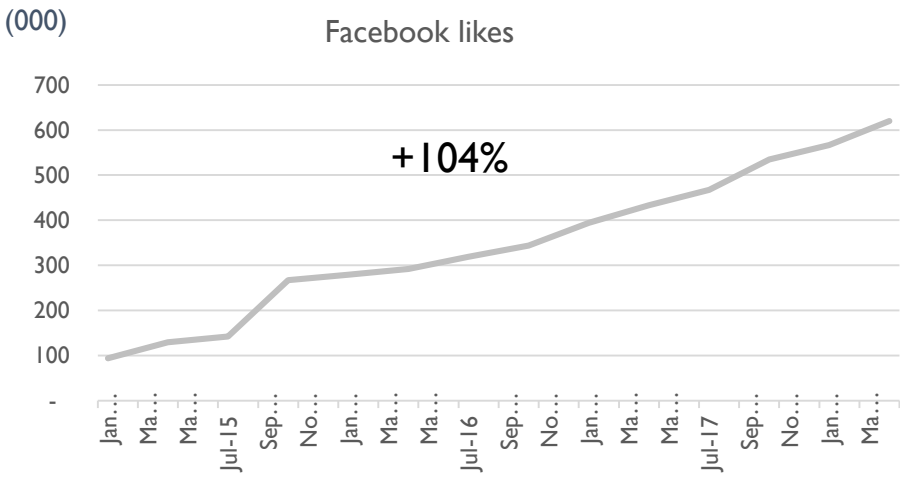
KPIs & MEASUREMENT

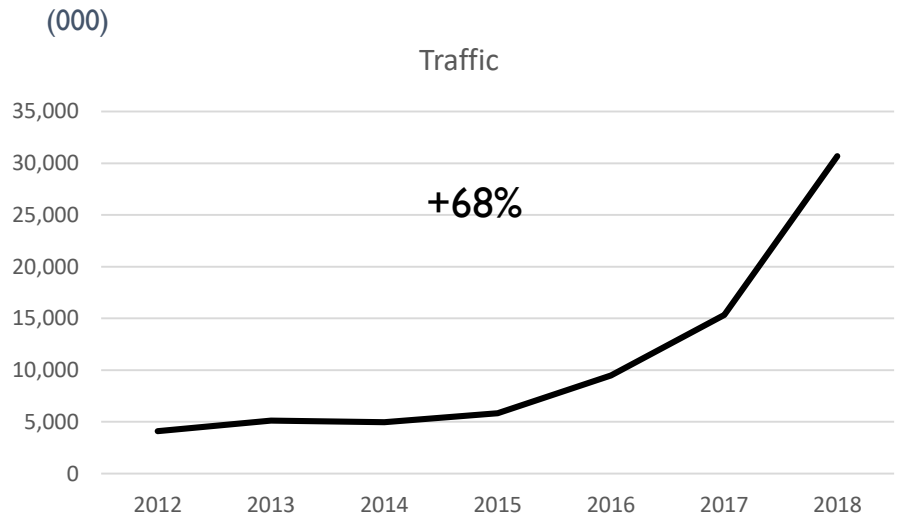
	Exposure	Engagement	Impact	Advocacy
PAID TV, out of home advertising, partnerships, collaborations, PPC, display, paid Influencers, social ads, paid content	• Impressions • Reach • Frequency • Viewability • Completed Views • Impacts	• Engagements (paid social) • Click-thrus • Page views (landing pages) • Interactions	• Web visits • Attending event • Sales conversion • Code redemptions	• Mentions in earned channels • Recommendations • Referrals • Reviews
OWNED Websites, mobile site, app, blog, social media channels, magazine, retail stores and concessions, franchise partners	• Traffic – sessions and visitors	• Return visitors • Page views per visit • App Downloads and usage • Subscriptions (newsletter / blog) • Interactions: clicks, views, likes, comments • Footfall	• Sales • Blog reads • Magazine downloads • Instore data capture • E-mail Sign-ups • App	• Repeat visitors • Mentions in earned channels • Recommendations • Referrals • Reviews
SHARED Social media, referrals – where brands and customers interact	• Organic impressions • Organic reach • No. of followers	• Likes / followers • Comments • Shares • Replies • Retweets • Hashtag usage	• Store visits • Sales conversion • Attend event • Tagging friends	• Mentions in earned channels • Recommendations • Referrals • Reviews • Hashtag Usage
EARNED Media relations, blogs, influencer elations (non-paid), customer reviews	• Reach of press coverage • No. of blogger posts	• Mentions • Impressions on blog posts • No. of customer reviews • Competition Entries	• Web visits • Attending events • Footfall in stores • Promo redemptions • No. of reviews	• Mentions in earned channels • Recommendations • Referrals • Reviews

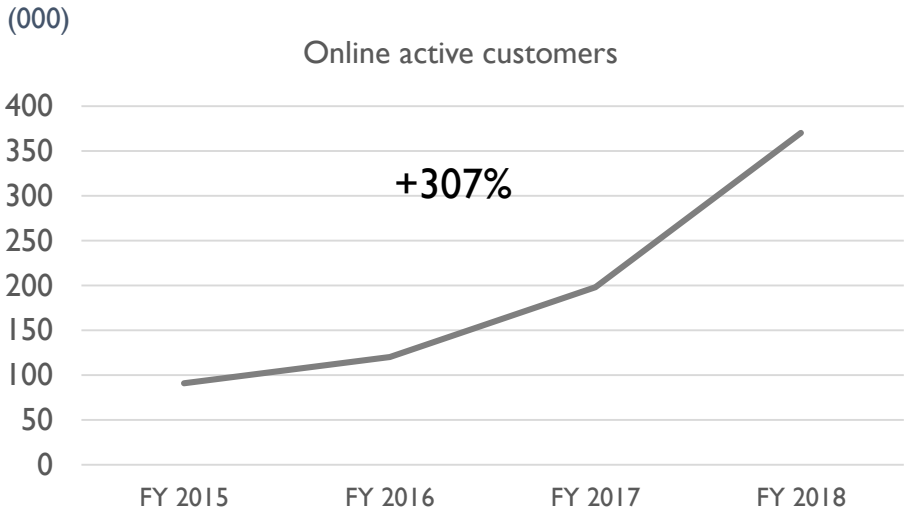
RETURN ON INVESTMENT

GROWTH OF THE QUIZ BRAND



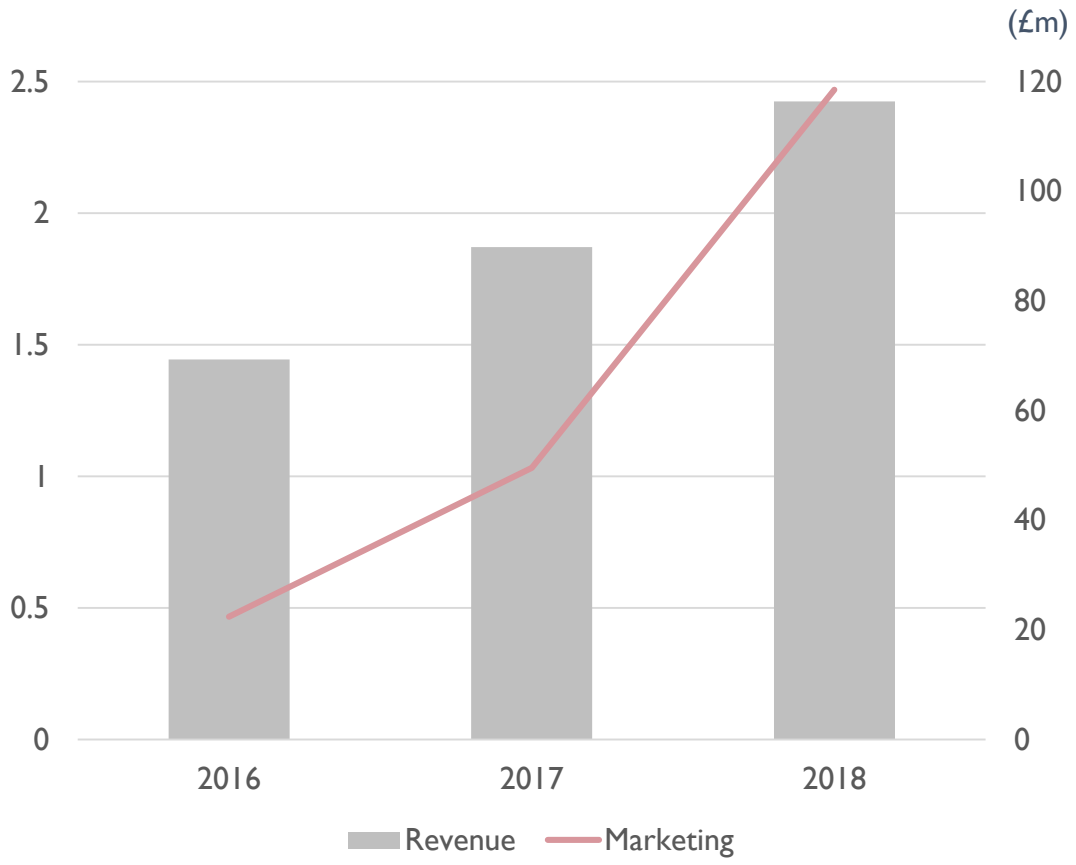






Active customers defined as customers who have purchased in the last 12 months

RETURN ON INVESTMENT



c.£7

FY18 cost per customer acquisition in the UK

INCREASED MARKETING INVESTMENT DRIVING ACTIVES AND SALES; HOWEVER RATIO REMAINS RELATIVELY LOW

LOOKING AHEAD

MORE DIGITAL ACTIVITY

MORE INTERNATIONAL ACTIVITY – CAMPAIGNS AND CONTENT

MORE BRAND TRACKING

MORE TOOLS TO GIVE US A SINGLE VIEW

MORE COLLABORATIONS

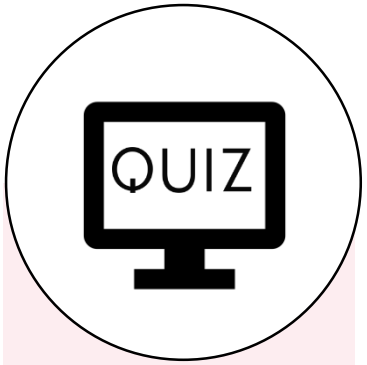
MORE INFLUENCERS

INVESTING IN MARKETING TEAM – PROVIDING RESOURCE AND COUNTRY FOCUS

PRODUCT & BUYING

Karen Dougall
Harry Butt

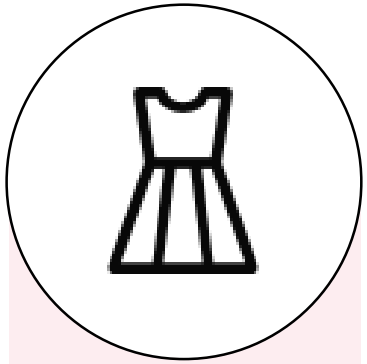
BUYING, DESIGN AND MERCHANDISING ADVANTAGE



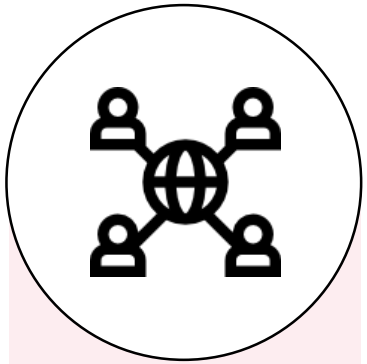
30 people across design, buying and merchandising

80% of all products designed in-house

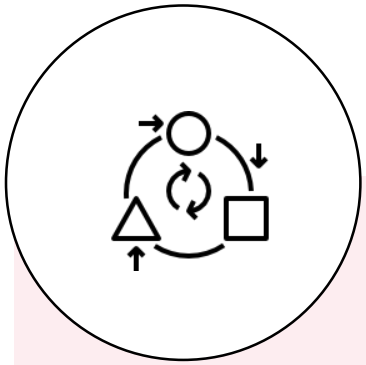
Total SKUs increased 30% in FY18 to c.2,300



Focus on not only fast fashion but great fit, quality and value for money as well.



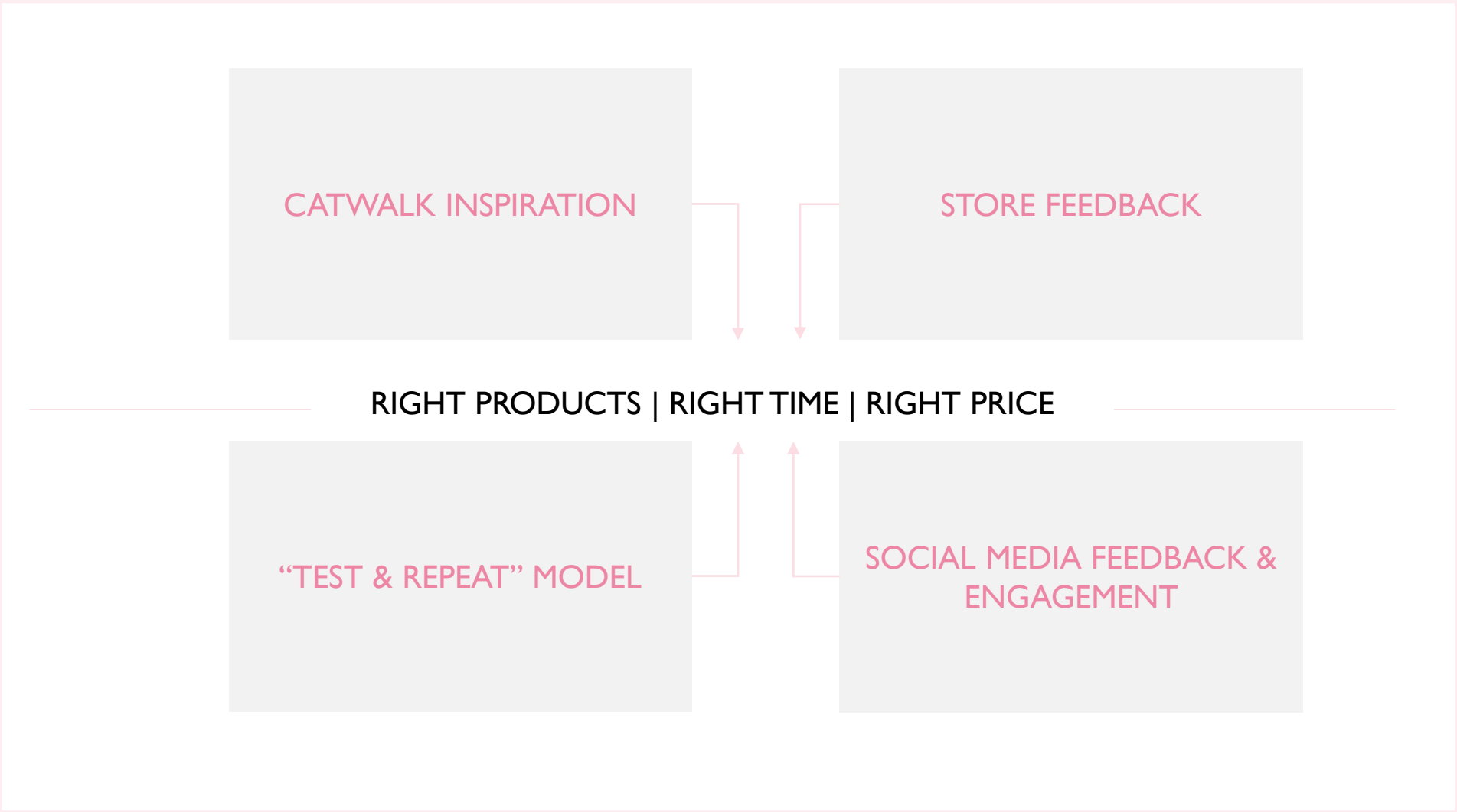
Supply chain enables fast production and rapid repeats: we can give our customers what they want, when they want it



Business model allows us to continually reduce slow moving stock

Provides ability to flex spend into high demand categories.

BUYING, DESIGN AND MERCHANDISING APPROACH



COMPLETE OUTFITS TO CAPTURE & MAXIMISE SPEND

34%	DRESSES & SKIRTS	from £12.99 – £120.00
23%	BLOUSES & TOPS	from £4.99 – £29.99
10%	PLAYSUITS	from £19.99 – £44.99
10%	OUTERWEAR & KNIT	from £19.99 – £79.99
7%	FOOTWEAR	from £17.99 – £44.99
6%	JEANS & BOTTOMS	from £7.99 – £34.99
5%	ACCESSORIES	from £6.99 – £34.99
3%	CURVE	from £19.99 – £79.99
2%	JEWELLERY	from £2.99 – £16.99

RELEVANT & FLEXIBLE PRODUCT RANGE TO SUIT CUSTOMER DEMAND

QUIZ

"TEST & REPEAT" – TRUE FAST FASHION

Products available for sale in stores & online next day delivery

New products supplied to stores every day

Styles & trends identified & developed

In-house team selects designs

DC allocates products to stores & online

1 – 2 days

Fabric sourcing & sampling process

1 – 5 days

Transport product to QUIZ

- *1 – 2 days from UK*
- *Up to 5 days from Far East by air*
- *Up to 21days from Far East by sea*

Product manufacturing

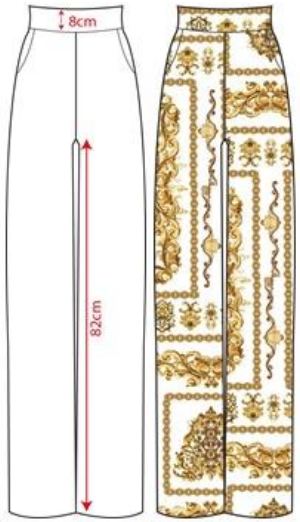
- *Up to 7 days in the UK*
- *7 – 21 days in the Far East*

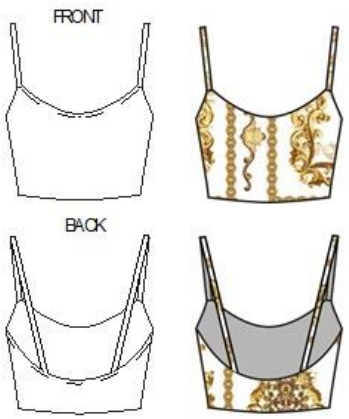
CATWALK / SOCIAL MEDIA TO STORE IN 2 – 4 WEEKS

CATWALK TO QUIZ

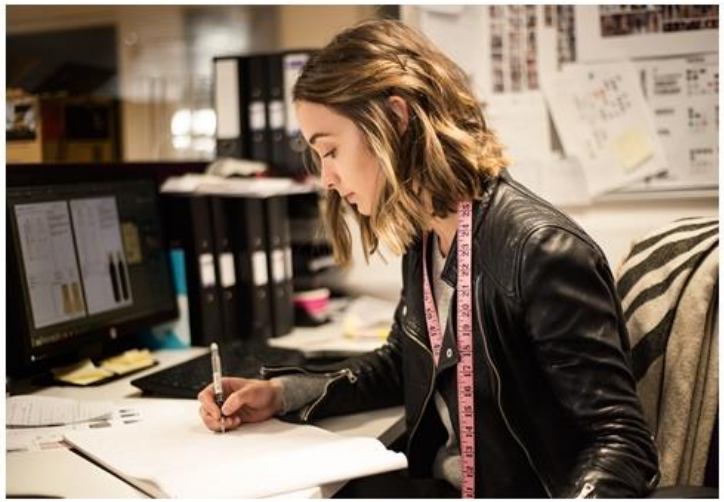
Sketching design ideas

Print CAD for design use



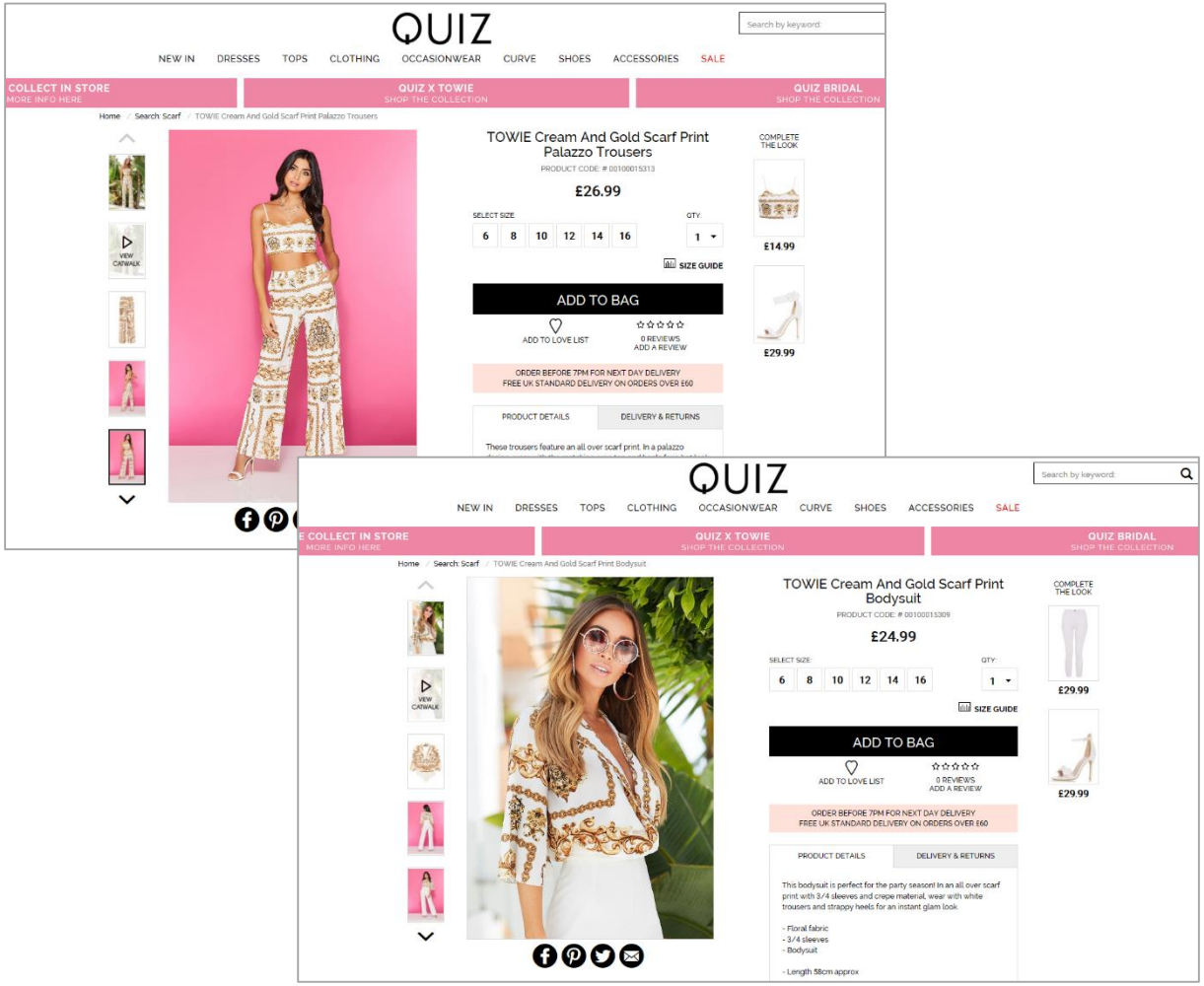


CAD SPECs for supplier manufacture



FROM DESIGN TO STORE WITHIN 28 DAYS

CATWALK TO QUIZ



FROM DESIGN TO STORE WITHIN 28 DAYS

QUIZMAN

- Trial collection crafted to complement the USP of womenswear - designed to offer a smart dressy look which flows from work to a night out
- Created to fill a gap – providing top brand looks at a value for money prices but not at a lower quality
- Leveraging the Group's infrastructure, the brand, team and supply chain to explore opportunities in fastest-growing segment of market
- Initial trial of **100 SKUs** across casualwear to tailoring with the addition of knitwear and outerwear for A/W 18
- QUIZMAN.com launched in April 2018; also trading on NEXT which has been well received; Debenhams to follow shortly
- Monitoring potential with future plans to grow through third –party concessions, internationally and on QUIZMAN.com

QUIZMAN – initial concept mood boards

QUIZMAN – PRODUCT "USP"

UK RETAIL

Omar Aziz

QUIZ's UK RETAIL PRESENCE

PROFITABLE & GROWING PILLAR

FY18 total retail sales increased 12%; store traffic increased 5.6%

Flexible leases and strong economics

Currently operate 71 stores and 147 concessions in the UK

PRIME LOCATIONS

New stores are always in prime location of centres

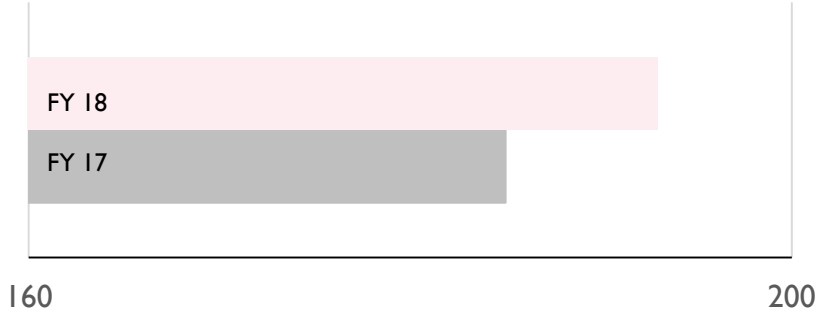
Vast majority in malls, with a mix of regional flagships, town centres and local shopping destinations

MORE THAN JUST STORES

Build brand awareness and reflect QUIZ's glamorous, aspirational identity

Support online growth through digital kiosks, in-store iPads, Click & Collect and fulfilment

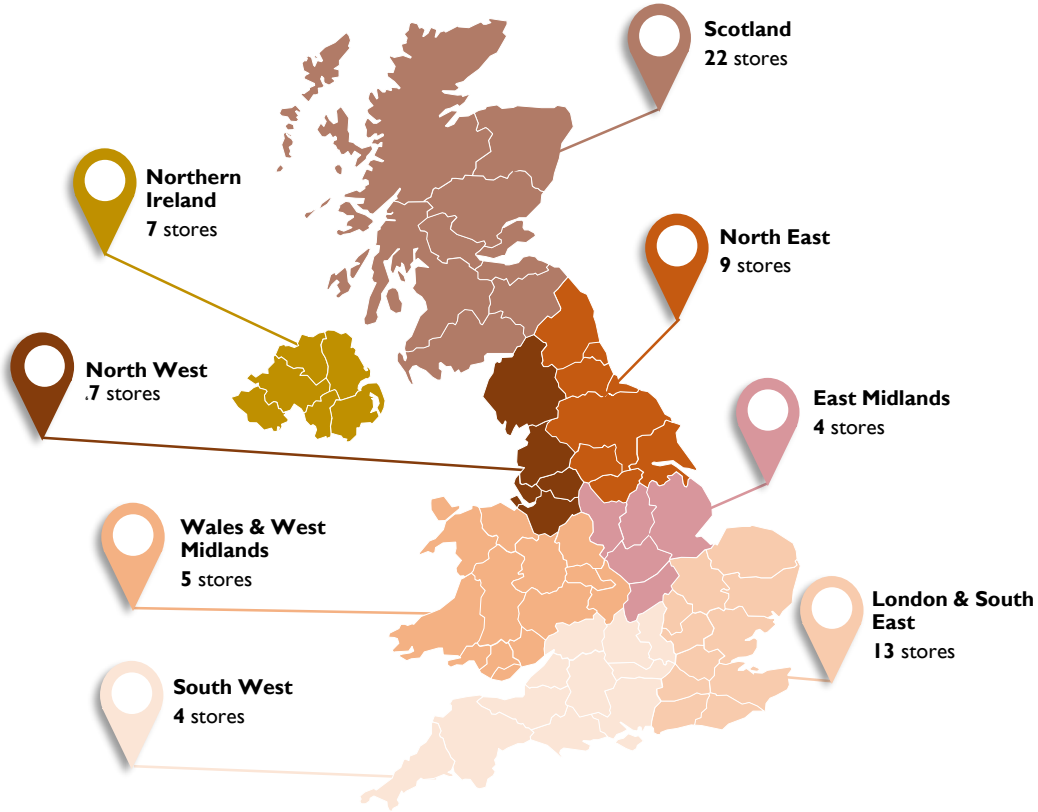
UK Retail Space – Square Footage (000 sq. ft.)



FLEXIBLE AND AGILE STORE ESTATE

- Flexible demand-led store estate with five year typical lease length
- Average time on leases remaining is 29 months
- No legacy leases or upward only rent reviews
- Potential new sites subjected to rigorous assessment process and incentives attained to reduce cap-ex exposure
- ROCE payback target for stores within 24 months
    - Last 12 sites which have been opened for more than one year achieved a 22 month payback

STORE LOCATIONS



PROFITABLE ESTATE
SHORT LEASES
MINIMISED RISK

QUIZ'S RETAIL MODEL

COMPELLING STORE EXPERIENCE

CONTINUALLY REFRESHED STOCK

New product delivered in store each week for in-store merchandising and window display: educating our customer to visit regularly

TRAINING & SERVICE

In store staff are trained and focused on offering a personal service to every customer

IN STORE TECHNOLOGY

Pads and digital kiosks broaden range and availability

CONTINUAL REFURBISHMENT PROGRAMME

Upgrading look, feel and design of stores

Sales increase of c.10% post refurb, in conjunction with the flexible lease structure and landlord incentives, ensures the investment is self funding

THE (NEW) ROLE OF THE STORE

- The store's role is changing with the increasing convergence with online and off-line routes to market
- Stores offer customers a physical touchpoint helping to build brand equity, loyalty and convenience
- QUIZ stores tie-in with social media and marketing campaigns to drive traffic and create exciting spaces for our customers to visit
- Huge marketing potential and ability to 'showcase' the brand gives a significant advantage over pure-play online retailers
- Act as a successful model for franchise partners and international opportunities
- Flexible approach, strict ROI criteria, prime locations and continued investment provides solid base going forward

65%

of shoppers browse online and then buy in-store (Source: CMO 2017)

5.6%

increase in store footfall for FY18

FLEXIBLE AND PROFITABLE CONCESSIONS

- Concessions provide an additional pillar in our omni-channel strategy
- They provide access to a different and often more affluent customer base, helping to increase brand awareness including online
- QUIZ is one of leading brands by sales density amongst many of our concession partners
- Minimal cap-ex and ROCE benchmark of 12 months – limited closures required in recent years
- No fixed lease terms so can exit when necessary relatively quickly
- Ability to scale up overseas opportunities with our concession experience

12%

FY18 concessions sales growth

97%

of QUIZ concessions are profitable

AN OMNI-CHANNEL EXPERIENCE

- Our in-store experience offers a smooth transition between online and the physical shopping experience
- Click & Collect, iPads and digital kiosks access to offer our full inventory at point of sale
- Introduction of e-receipts to capture customer data and better tailor our marketing

What's next?

- Give store staff visibility of relevant customer data to help engage with the customer e.g. customers online wish lists or social likes
- Use of visual media in-store to promote the QUIZ identity
- In-store customer social interactions to help promote QUIZ through the customers social network
- Continually refine and improve customer ordering & convenience

THE WAY AHEAD

- The physical side of retail is here to stay: used effectively stores are a real asset and an important part of engaging with the customers and building brand loyalty
- Brands that can complement the online and off-line routes to market will have the best chance of growing total market share
- We will continue to invest in product, technology and store experience to maintain a compelling store experience
- QUIZ DNA is all about flexibility, agility and speed: we can follow the customer and adapt to whichever channel suits the market we are operating in
- Continue to appraise openings with between five and seven new UK stores anticipated in the year ahead

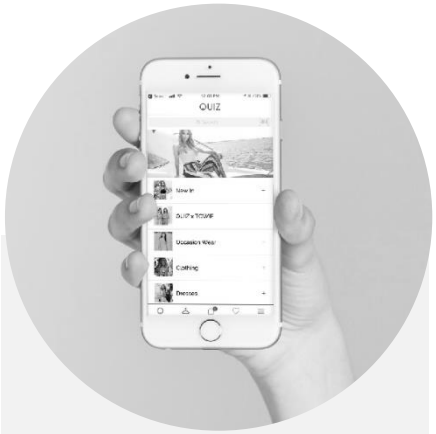
INTERNATIONAL EXPANSION

Keith Austin

CLEAR GROWTH STRATEGY

STORES & CONCESSIONS

INTERNATIONAL



ONLINE

STRATEGIC VISION TO BECOME A GLOBAL OMNI-CHANNEL FAST FASHION BRAND

GROWING INTERNATIONAL BRAND

32%

FY18 international revenue growth*

18%

FY18 international sales as a proportion of Group

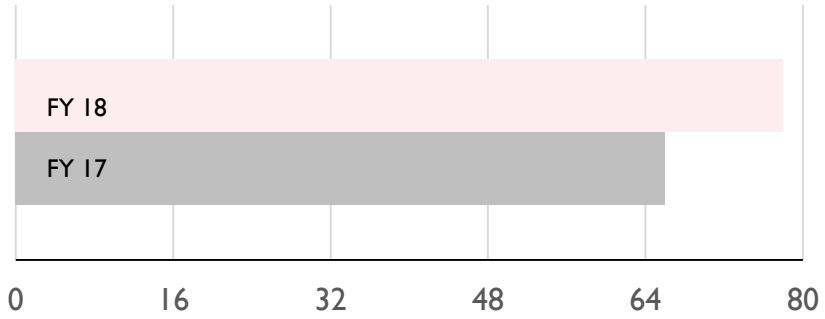
300

QUIZ outlets** worldwide

20

Countries with QUIZ stores

International outlets serviced



**International sales comprise the results from QUIZ standalone stores and concessions in the Republic of Ireland, standalone stores in Spain and franchises in 20 countries. Figures refer to underlying sales which exclude non-recurring wholesale revenue in relation to Spain in the year ended 31 March 2017.*

*** Including UK standalone stores, UK concessions, international franchise stores, concessions, wholesale partners & international online partners*

"LAND AND EXPAND" INTERNATIONAL STRATEGY

Five vertical routes to customer give significant flexibility

Department stores (wholesale / concessions)

Own stores
- Strategic developed markets

Franchise stores
- Developing markets

Own websites

Partner websites
- Access different customers
- Build brand awareness

Factors to consider
- Market size/development
- Operational complexity
- Brand awareness
- Partner availability
- Local legislation
- Financial economics (e.g. ROCE)
- Capital requirements

International team to drive individual market requirements

USING A LOW-RISK APPROACH TAILORED TO THE INDIVIDUAL MARKET OPPORTUNTY

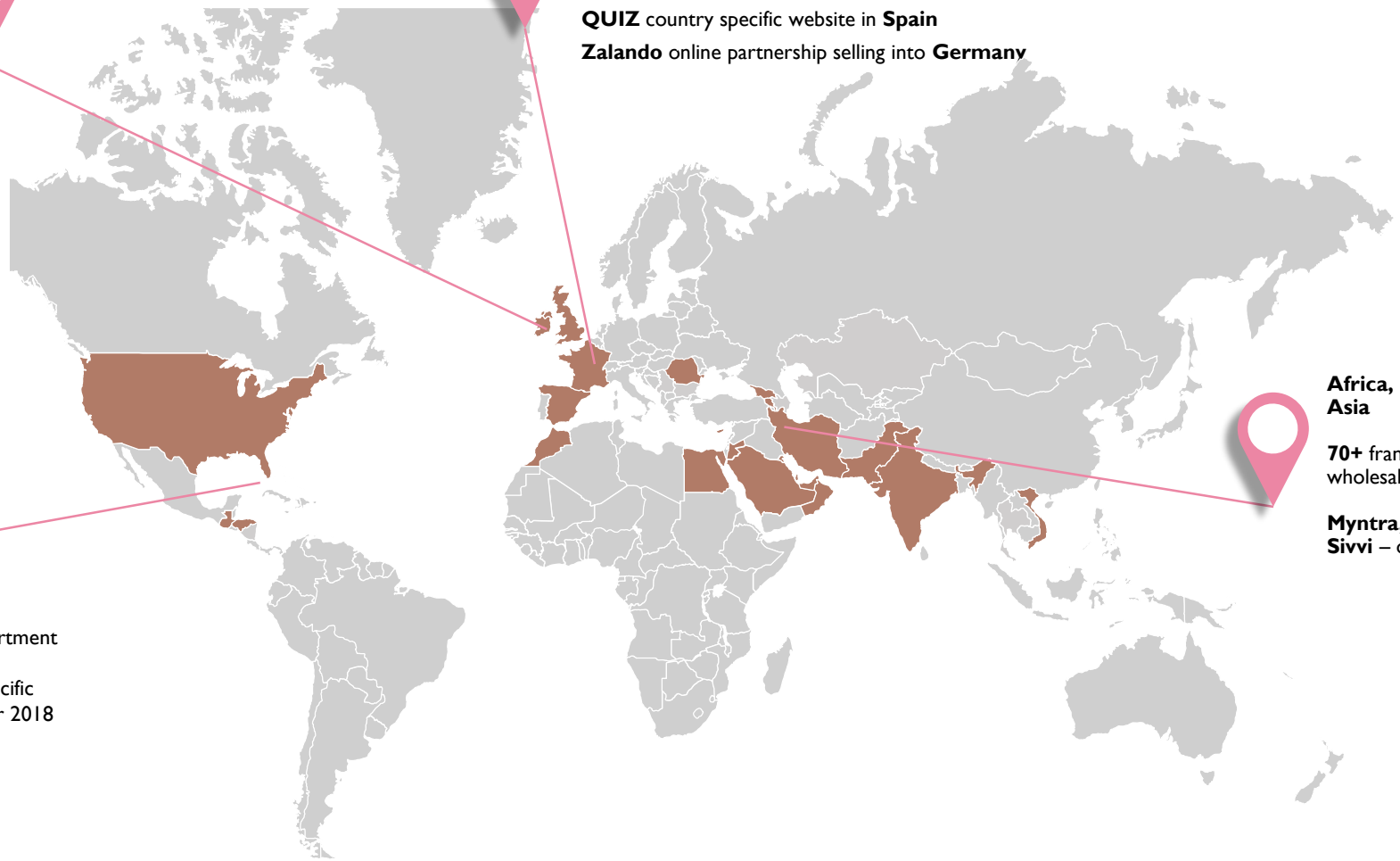
ESTABLISHED OMNI-CHANNEL & INTERNATIONAL BRAND

UK

71 standalone stores
147 concessions

Own website
5 online partners

Europe
7 standalone stores in **Ireland**
20 concessions in **Ireland**
3 standalone stores in **Spain**
QUIZ country specific website in **Spain**
Zalando online partnership selling into **Germany**



Africa, Middle East & Asia

70+ franchises stores / wholesale partners

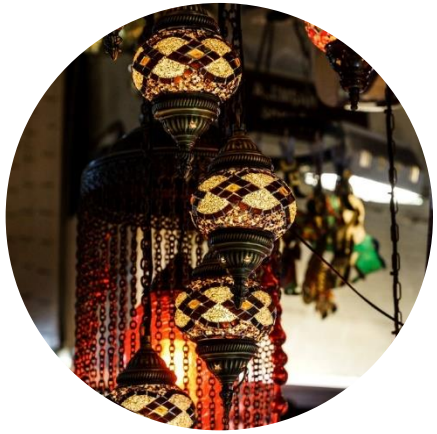
Myntra, Namshi & Sivvi – online partners

US

Wholesale to department stores
QUIZ country specific website planned for 2018

** Including UK standalone stores, UK concessions, international franchise stores, concessions, wholesale partners & international online partners*

INTERNATIONAL GROWTH FOCUS FOR 2019



MIDDLE-EAST

SPAIN

USA

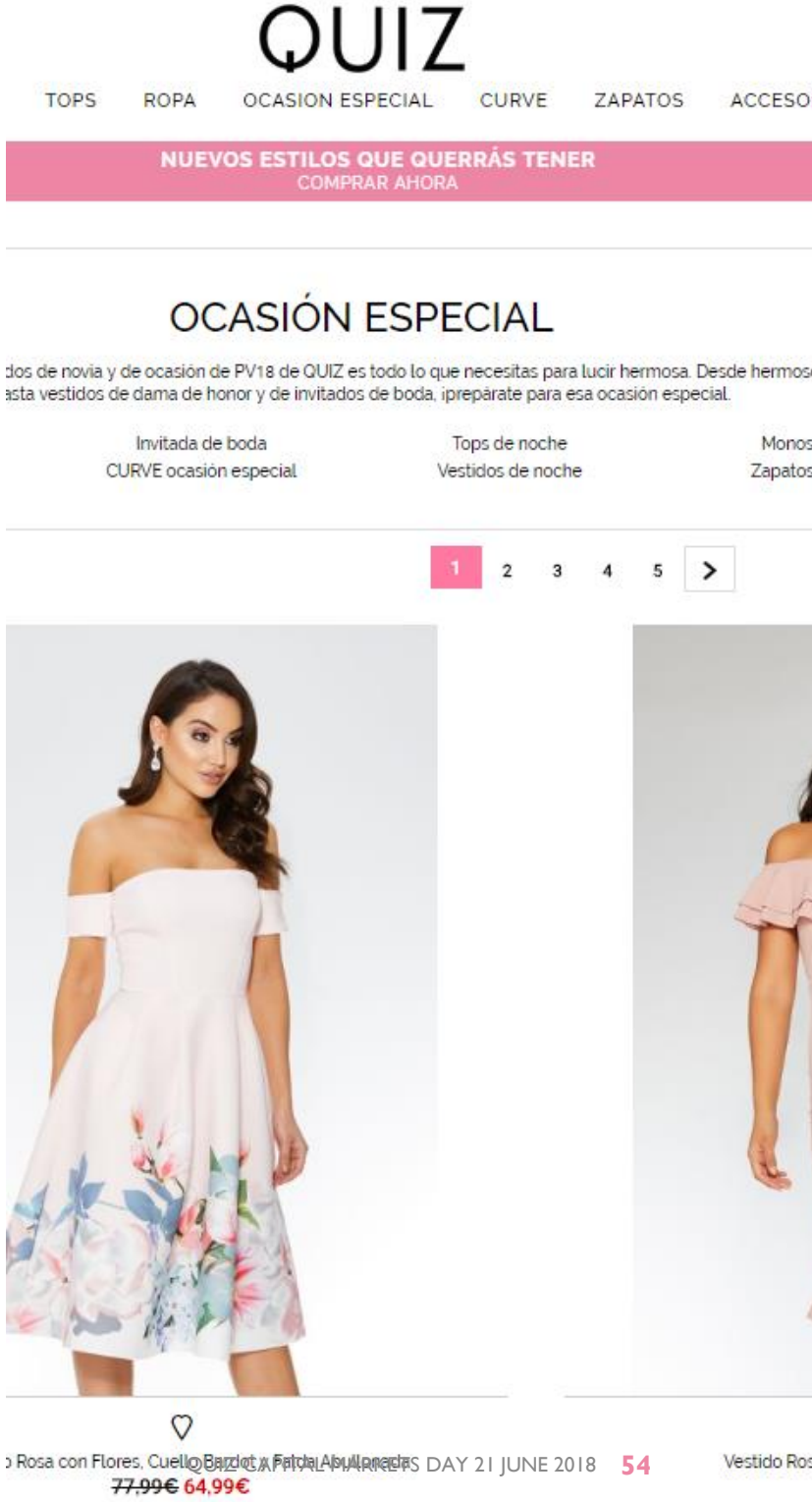
MIDDLE EAST – MUTLI-CHANNEL EXPANSION

LAND	EXPAND	OPPORTUNITY
Franchise operations were initially established in the Middle East in 2006 First in Riyadh, Saudi Arabia and Dubai The customer profile and QUIZ product of maxi dresses and long gowns, and shopping experience complimented the QUIZ brand With two partners opened 29 stores in Saudi Arabia, eight stores in UAE, three in Jordan and seven in Egypt	Successfully transitioned partners from wholesale to consignment models – giving double digit growth for both the partner and QUIZ Now in multiple countries in the Middle East. QUIZ partners have the right infrastructure, culture and influence with the landlords to open stores in the right location Wholesale agreement with leading market player	Opportunity to open up to 12 stores in the region in the next 12 months Anticipate opening further franchise outlets in current financial year Third party wholesale online is growing exponentially as mobile increases

Potential of sales growth in excess of 20%

SPAIN – ESTABLISHING THE BRAND

LAND	EXPAND	OPPORTUNITY
Wholesale opportunity with stock package which launched in 2016 – demonstrated strong appetite in the Spanish market It was a low risk approach to test the market Core product offering similar to the UK but styles tailored for Spanish market	Three stores opened in Madrid in Autumn 2017 – first outside UK and ROI Same investment criteria applied; leases with five year term Website launched in September 2017 Steady improvement in sales through 2018 Supported by experienced Area and General Managers	Allow for a full year's sales before committing to any further expenditure – prudent and measured The brand continues to resonate well in the Spanish market as we continue to track market specific opportunities



USA – EXPLORING THE POTENTIAL

LAND	EXPAND	OPPORTUNITY
Entered through wholesale pop-up in Lord & Taylor department stores in December 2017 Strong reaction to pop-up store led to a rollout from four to 30 stores from April 2018 – Lord & Taylor's fastest rollout for a ladies fashion brand Leverage Lord & Taylor's customer base; USA huge market opportunity Lord & Taylor known for its dressy proposition – QUIZ is a filling a gap in their assortment – win, win opportunity	Product being sold through Lord & Taylor website selling well – 30% of QUIZ sales were though the website Resulted in the launch of QUIZ US website in April 2018 Lord & Taylor recently partnered with Walmart.com as their premium fashion solution	Look to develop offline and online opportunities with department stores throughout the states Increase brand awareness through partnership marketing with Walmart and Lord & Taylor

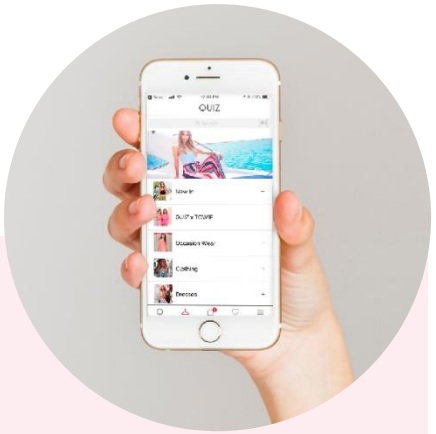
ONLINE GROWTH

Haroun Saleemi

CLEAR GROWTH STRATEGY

STORES & CONCESSIONS

INTERNATIONAL



ONLINE

STRATEGIC VISION TO BECOME A GLOBAL OMNI-CHANNEL FAST FASHION BRAND

QUIZ ONLINE

4

own brand websites: QUIZ UK, QUIZ US, QUIZ ES and QUIZMAN

5

Online with third parties including Next, Debenhams and Zalando

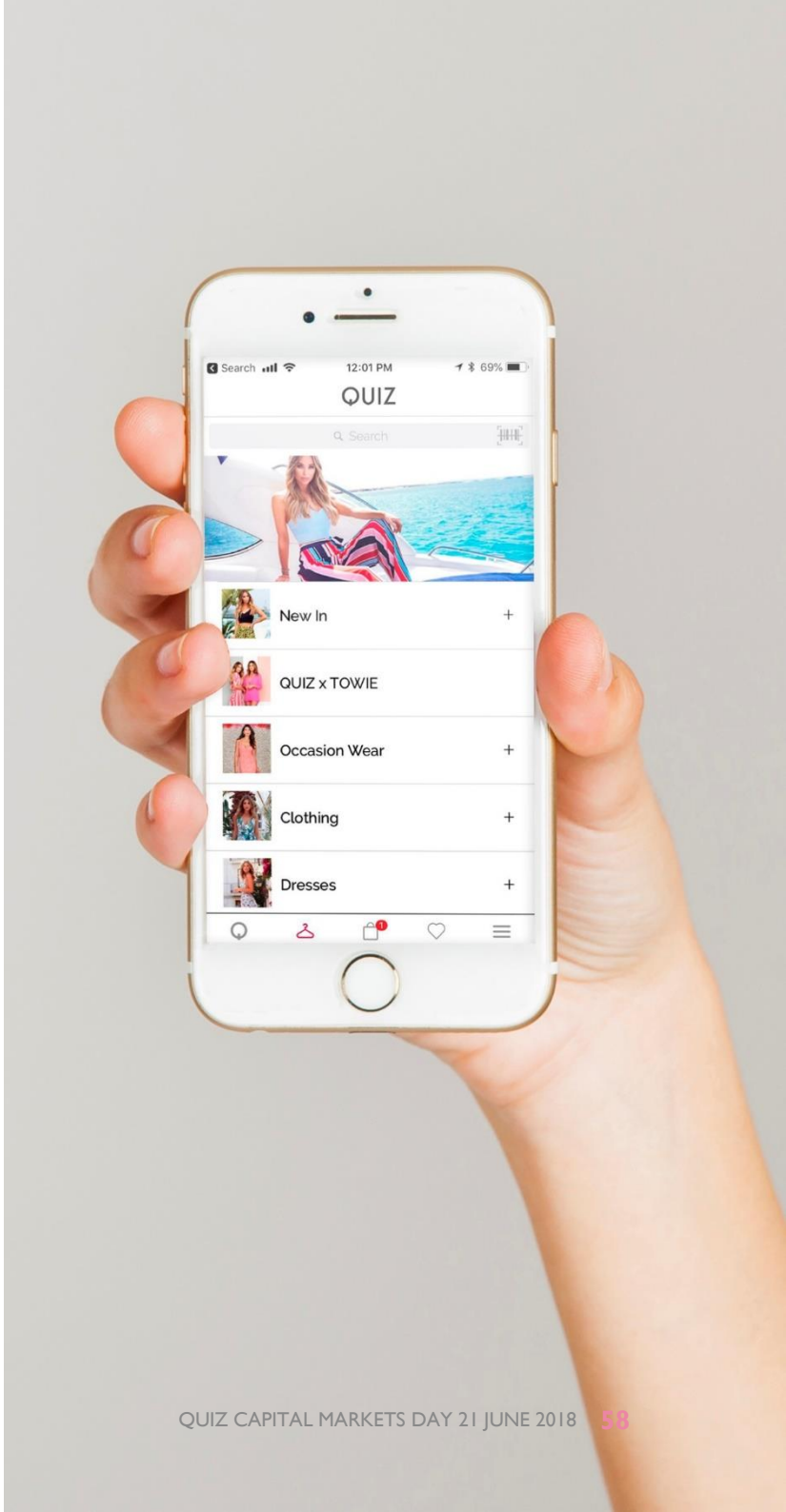
102%

Growth in FY18 online sales through QUIZ own websites and apps

158%

FY18 online revenue growth – QUIZ's fastest growing channel

RAPIDLY GROWING ONLINE PRESENCE



HOLISTIC ONLINE EXPANSION STRATEGY

RAPID ONLINE GROWTH

RAPID ONLINE GROWTH

QUIZ websites
40% FY18 online sales

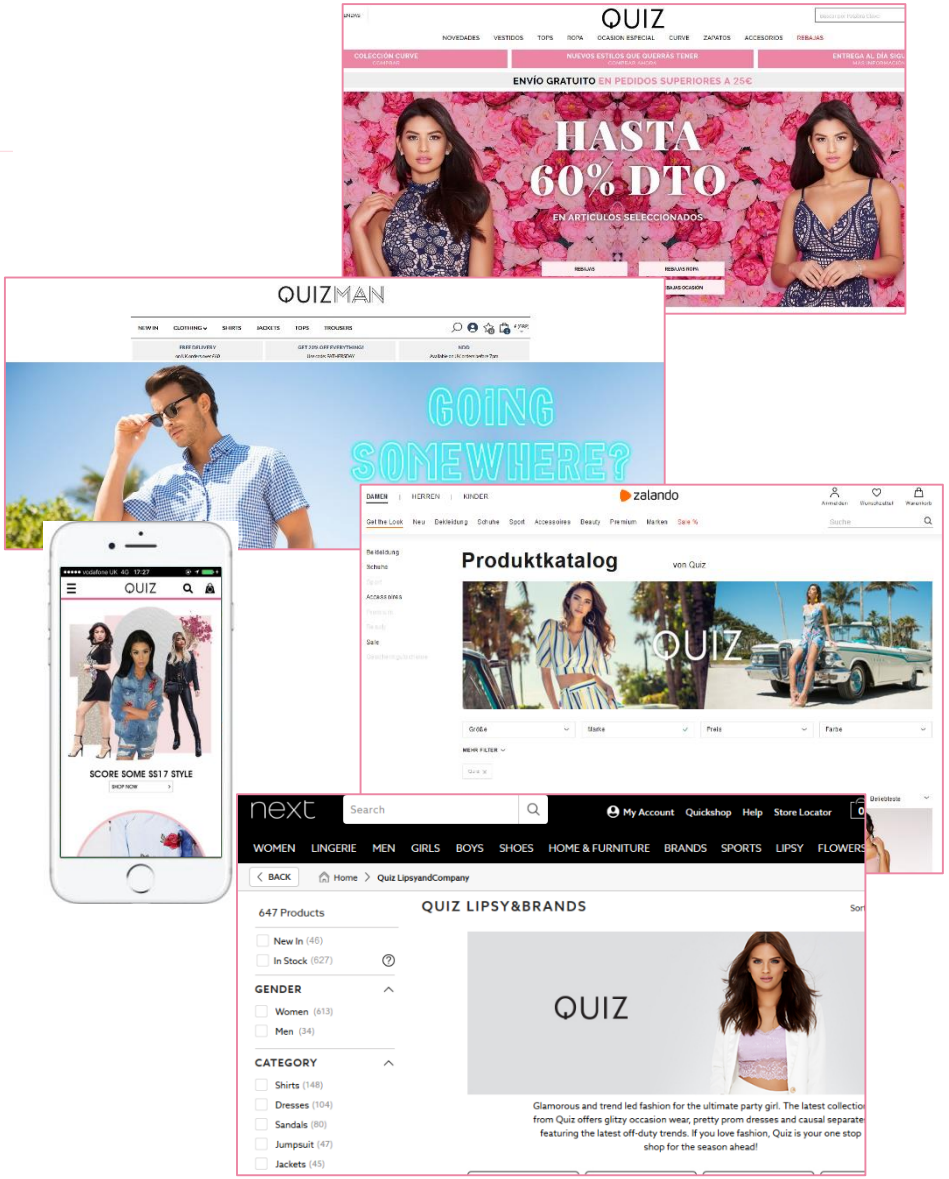
Partner websites
60% FY18 online sales

Apps
Currently 5% of QUIZ website sales

In-store
iPads, kiosks and click & collect
C&C represented 25% of FY18 online sales

Great product & exclusive collections

Marketing & awareness



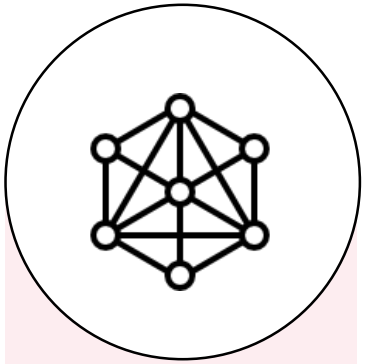
FOCUS AREAS

EXCLUSIVE PRODUCT & COLLECTIONS

Curve launched initially online only in March 2017

Bridal initially online only in April 2017

QUIZMAN.com



TECHNOLOGY & INNOVATION

Investment in in-house development team

Amazon Web Services to support global growth

In-house studio – agility and speed

Complex integrations with third party platforms - Using API technology

COUNTRY SPECIFIC WEBSITES

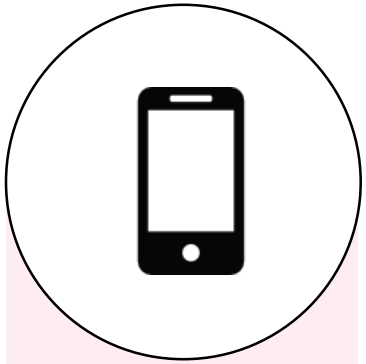
Multi-currency and multi-domain ecommerce platform

Launched Spain (September 2017) and US (April 2018)

THIRD-PARTY WEBSITES

Successful launch with Zalando in May 2017

Strong growth with Next, started in H2 2017

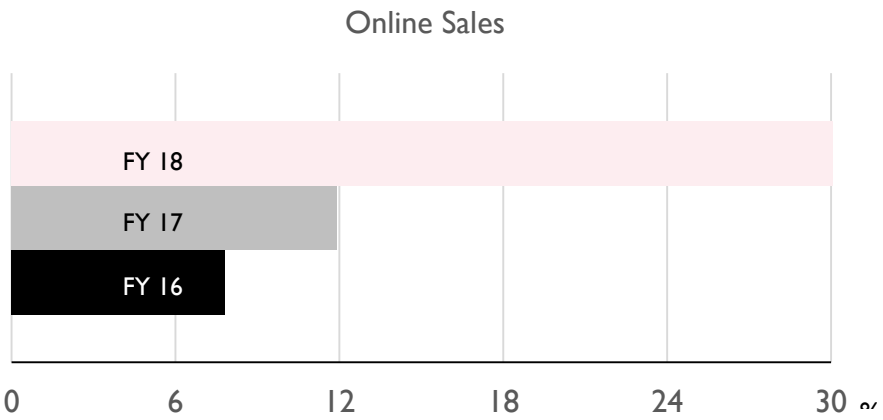


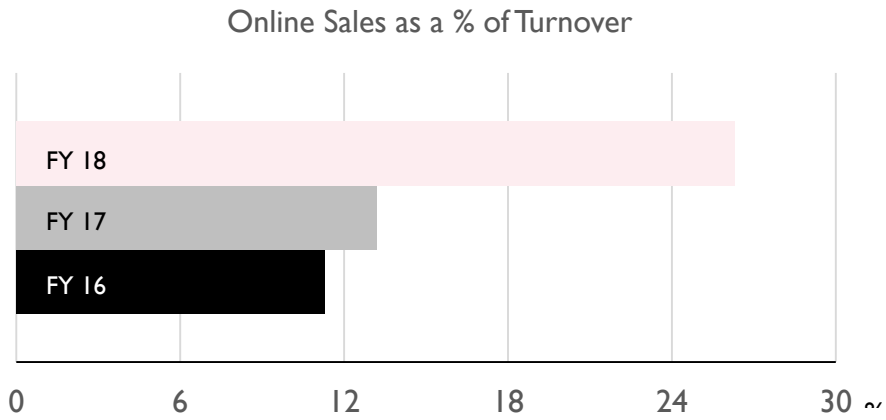
DEVELOPING MOBILE CHANNELS

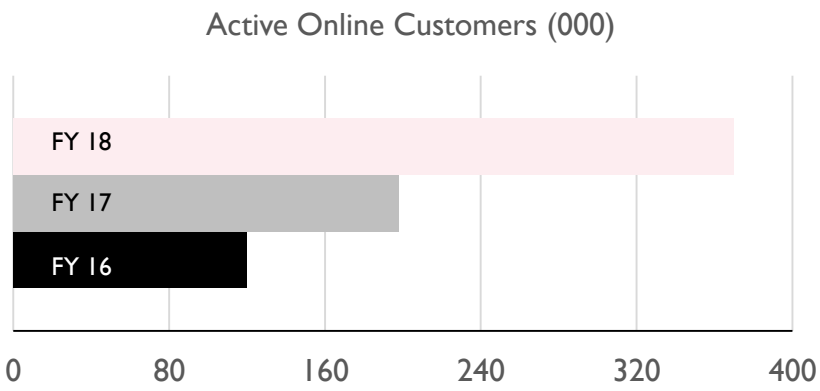
Fastest growing channel

New Android and iOS app launched in October 2017

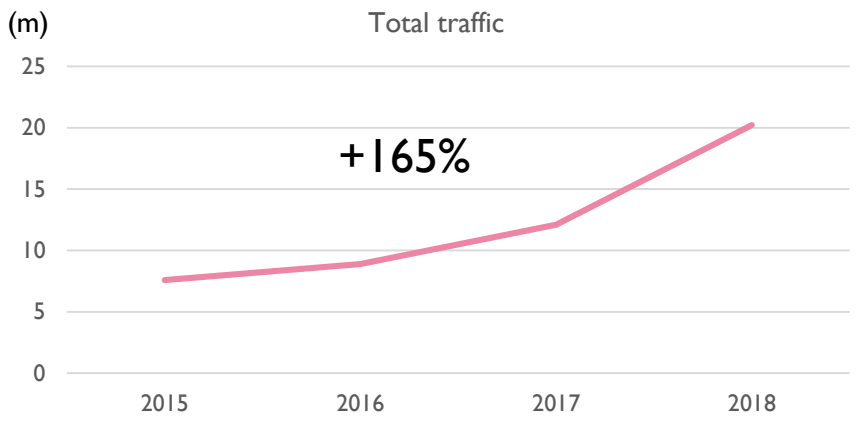
RESULTING IN POSITIVE TRENDS ACROSS KPIs

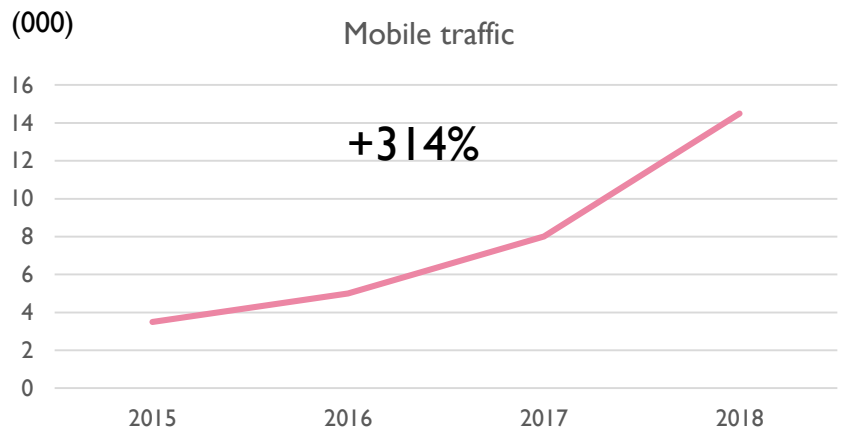


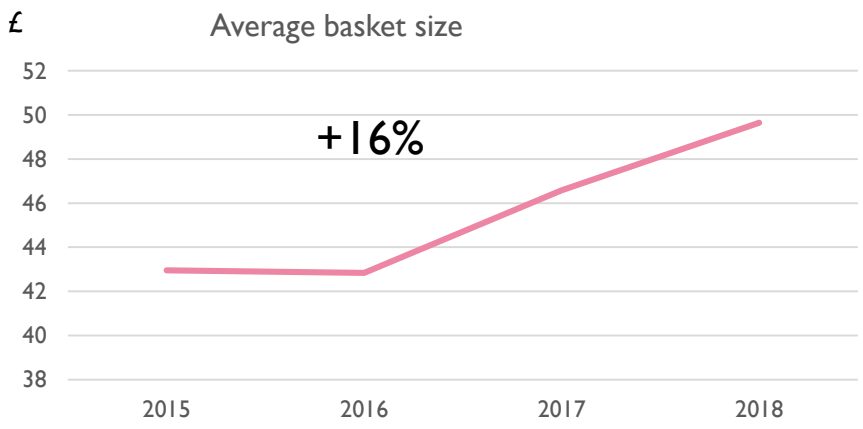


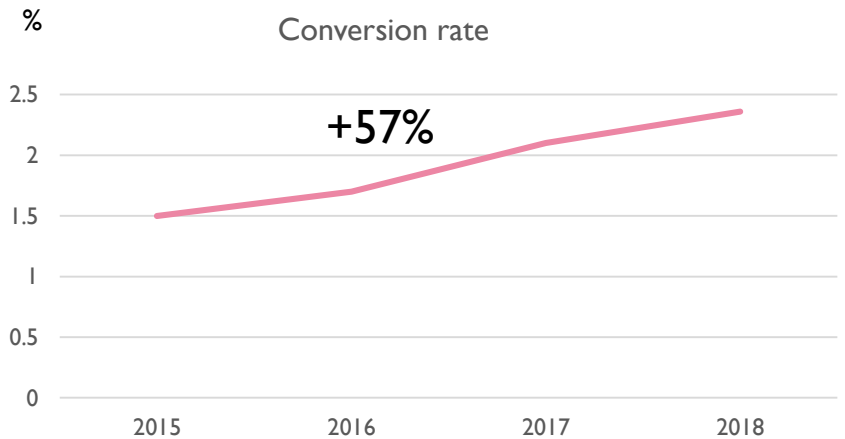


RESULTING IN POSITIVE TRENDS ACROSS KPIs



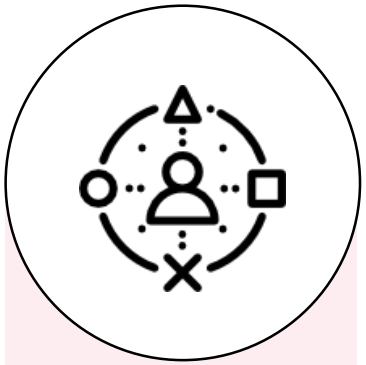






WHAT'S NEXT

CONTINUED ONLINE GROWTH



EXPERIENCE

Next day delivery cut off improved to 7pm

Same day delivery (to store)

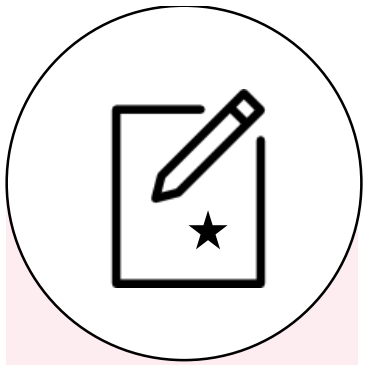
New Pick Up options: ASDA & Hermes

Annual delivery pass

Payment options: Klarna, Amazon pay

Mobile - new checkout & visual Search

New best in class platform to optimise online experience - product listing pages, basket and checkout etc.

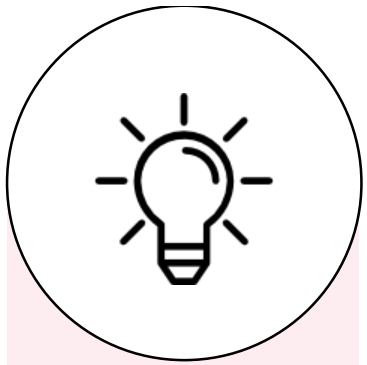


PERSONALISATION

Advanced analytics and personalisation tools

New marketing platform - single customer view

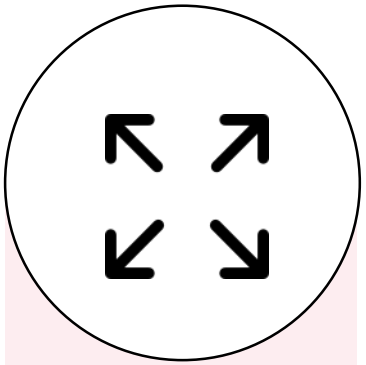
Automated and personalised marketing activities



INNOVATION

AI - post purchase experience e.g. chatbots

AR – create engaging in-store mobile experiences



EXPANSION

Continued investment in product and exclusive collections

New and optimised product ranges for all third party sites

New territories with Zalando

CLOSING REMARKS

Q&A