



**CAPITAL MARKETS
EVENT**

29 JUNE 2016

1

INTRODUCTION

NICK BEIGHTON – CEO

asos



INTRODUCTION



**SIGNIFICANT
OPPORTUNITIES**



**FINANCIAL
STRENGTH**



**UNDERSTAND
OUR CUSTOMERS**

AGENDA

	TIME	TOPIC	PRESENTERS
1	1:00 PM	INTRODUCTION	NICK B
2	1:10 PM	GROWTH OPPORTUNITIES	NICK B
3	1:20 PM	FINANCIAL PERSPECTIVES	HELEN
4	1:35 PM	TECHNOLOGY AND MOBILE	CLIFF, BOB, ANDREA
2:20 PM		Q&A	
2:50 PM		SHORT BREAK	
5	3:10 PM	CUSTOMER ACQUISITION AND ENGAGEMENT	ANDY, EVE
6	3:40PM	RETAIL, DESIGN AND PRODUCTION	NICK L, STEFAN, VANESSA, JOHN
4:20 PM		Q&A	
7	4:50 PM	CONCLUDING REMARKS	NICK B
5:00 PM		FASHION CATWALK	

THE PRESENTING ASOS TEAM

EXECUTIVES



NICK BEIGHTON
CEO



HELEN ASHTON
CFO



CLIFF COHEN
CIO



BOB STRUDWICK
CTO



ANDREA TROCINO
Head of Mobile

ACQUISITION + ENGAGEMENT



ANDY BERKS
Director of
Perform. Marketing



EVE WILLIAMS
Brand Experience
Director



NICK LOVEDAY
Womenswear (WW)
Retail Director



STEFAN PESTICCIO
Menswear (MW)
Retail Director



VANESSA SPENCE
Womenswear
Design Director



JOHN MOONEY
MW Creative
Director & Production

TECHNOLOGY

MOBILE

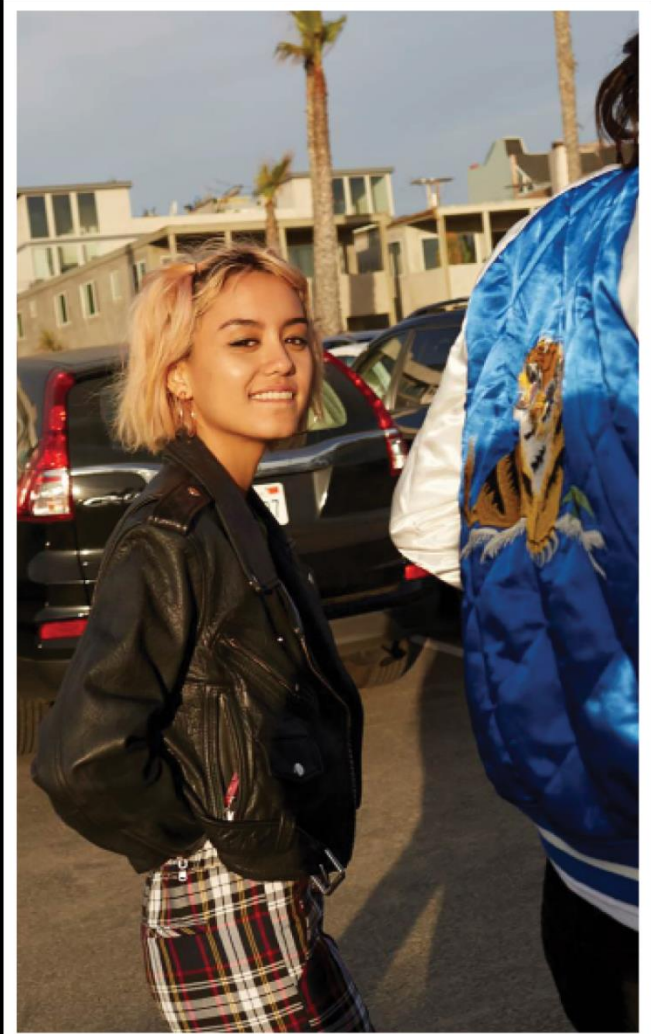
RETAIL

2

GROWTH OPPORTUNITIES & STRATEGY

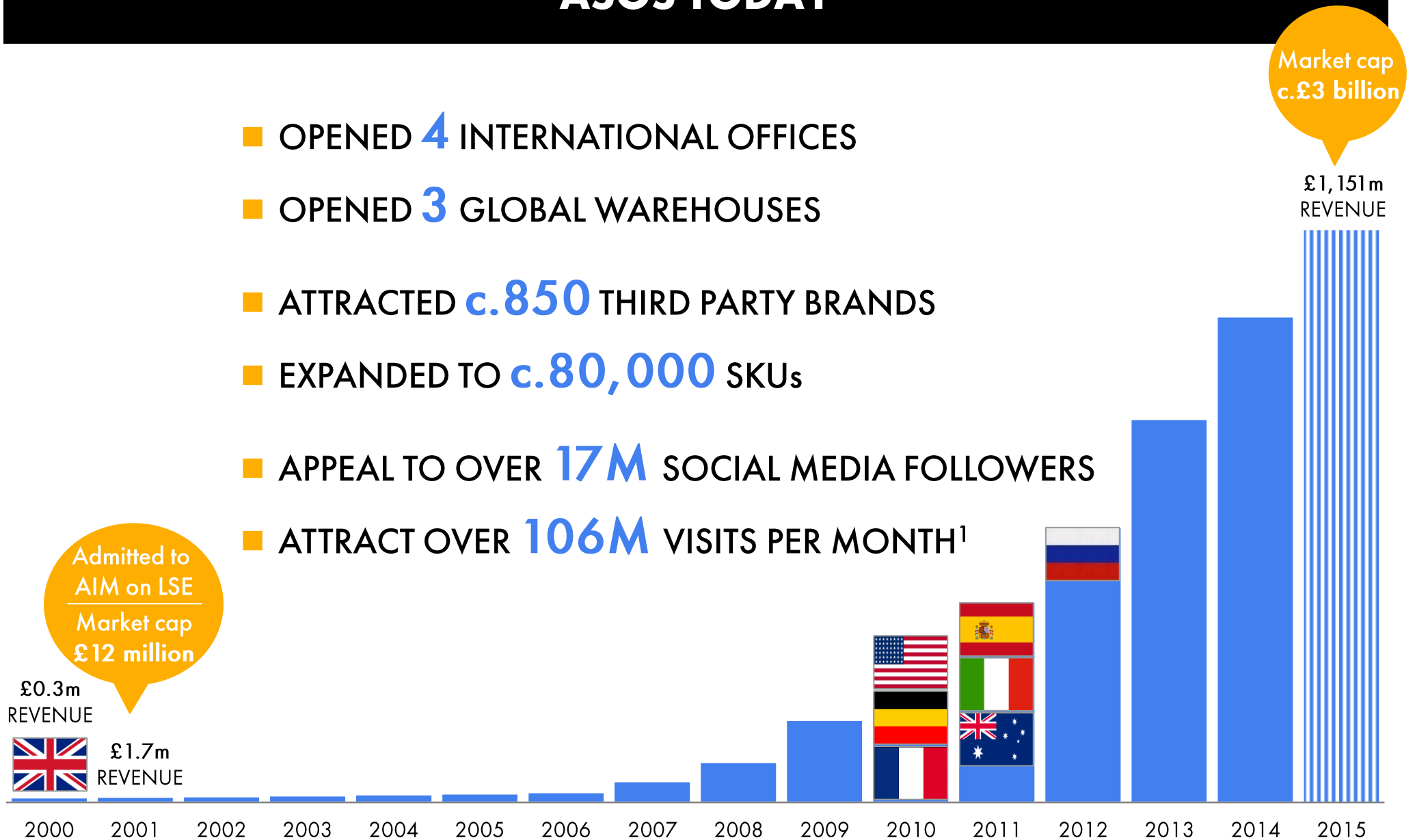
NICK BEIGHTON – CEO

asos



ASOS TODAY

- OPENED **4** INTERNATIONAL OFFICES
- OPENED **3** GLOBAL WAREHOUSES
- ATTRACTED **c.850** THIRD PARTY BRANDS
- EXPANDED TO **c.80,000** SKUs
- APPEAL TO OVER **17M** SOCIAL MEDIA FOLLOWERS
- ATTRACT OVER **106M** VISITS PER MONTH¹



Note: ¹ As at February 2016

WHAT MAKES ASOS SO SPECIAL?

UNIQUE EDIT OF BRANDS

A-Z BRANDS																										
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	SHOW ALL
A A GOLD E A STAR IS BORN ABERCROMBIE & FITCH ADIDAS ORIGINALS ADJESCENT CLOTHING ADPT	B BAASH BABYLESS BARD OF GYPSIES BAR.DD BARRY M. BCBGENERATION BCBOMAVAZZIA BEACH RIOT	C CALL IT SPRING CALVIN KLEIN CAMBRIDGE SATCHEL COMPANY CARHARTT WIP CARMAKOMA	D DAISY DIXON DAISY LONDON DAISY STREET DANIEL SANDLER	E EBONIE N IVORY ECD BRANDS ELEGANT TOUCH ELEMIS	F FAITH FAITHFULL FAME AND PARTNERS FASHION FORMS FASHION UNION FILA	G G-STAR GANNI GAT RIMON	H H BY HUDSON HARRY JACKSON HEIDI KLUM INTIMATES HERSCHEL SUPPLY HERSHESONS	I AJ MORGAN IMAT ALDO ALICE MCCALL ALICE & YOU	J BEC & BRIDGE BECKSONDERGAARD BENEFIT BILL STUTNER BILLABONG BIRKENSTOCK BLACK & BROWN	K CARVELA CASIO CATPAZZI CATH KIDSTON CHEAP MONDAY CHELSEA PEERS	L DANIEL WELLINGTON DENIM & SUPPLY BY RALPH LAUREN DIESEL	M DOGGED DOITY DOLCE & GABBANA DR.BRONNER	N EMPORIO ARMANI ESPRIT EVA NYC	O CHILD OF WILD CLATE CLOSET CLOUD NINE CLUB L	P FOREVER UNIQUE FOR LOVE & LEMONS FOSSIL FRED PERRY	Q GINGER FIZZ GIPSY	R ALTER AMELIORATE AMORALIA ANN SUMMERS AQ AQ	S ARMANI EXCHANGE ASOS AFRICA ASOS COLLECTION ASOS JEANS ASOS SALON ASOS WHITE	T BONDS BOOHOO BRAUN BOSS ORANGE BOURJOIS BOYS & ARROWS BRISTON	U C/MEO COAST CONVERSE COWSHED CRIMINAL DAMAGE CURRENT/ELLOTT	V DR DENIM DR MARTENS DUNE	W EYEKO EYLAND EYLURE	X FREE PEOPLE FREE SOCIETY FRENCH CONNECTION FROCK & FRILL FROM ST XAVIER	Y GLAMOROUS GOSSARD	Z HOUSE OF SUNNY HOXTON HAUS HURTER HYPE	

THE ASOS BRAND



ENGAGING CONTENT

FASHION & BEAUTY FEED
Celebrity style, shopping tips, outfit ideas and how-tos

IT'S BABY SHOWER POWER
DING
10 WHEAT TO
ago

LILY'S SERIOUSLY GOOD BEAUTY
LOOK
BEAUTY LOOK OF THE WEEK
10 hours ago

TRACKSUITS JUST GOT WAY CHIC
LOOK
EVERYONE IS WEARING
1 day ago

THESE ARE YOUR SUMMER
SWEATERS
WASHERDICHANE STYLE STEALS
1 day ago

Y... METALLIC SLIPS ARE
ING YOU
UK TREND DECODED
ago

CANNES JUST SMASHED THE
FASHION GAME
WHAT'S TRENDING
2 days ago

THESE JEANS ARE THE NINETIES
DREAM
THREE WAYS TO WEAR
2 days ago

YOUR 10 FESTIVAL FRIENDS TO
BAG NOW
HOT 10
3 days ago

OUR STRATEGY IS FOCUSSED

**GREAT FASHION,
GREAT PRICE**

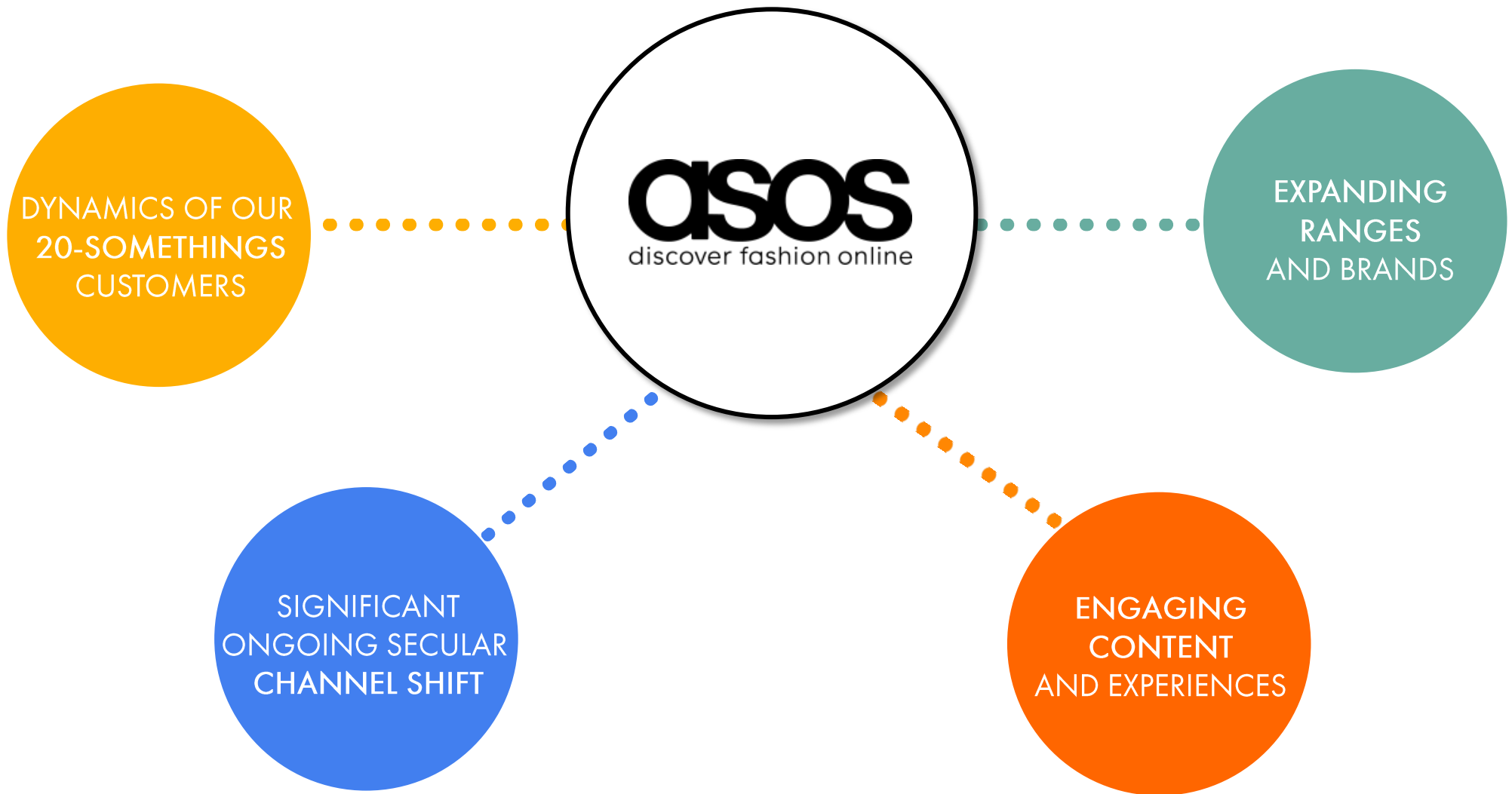
**AWESOME ON
MOBILE**

TO BECOME
THE WORLD'S
NO.1
ONLINE FASHION DESTINATION
FOR 20
SOMETHINGS

**BEST-IN-CLASS
SERVICE**

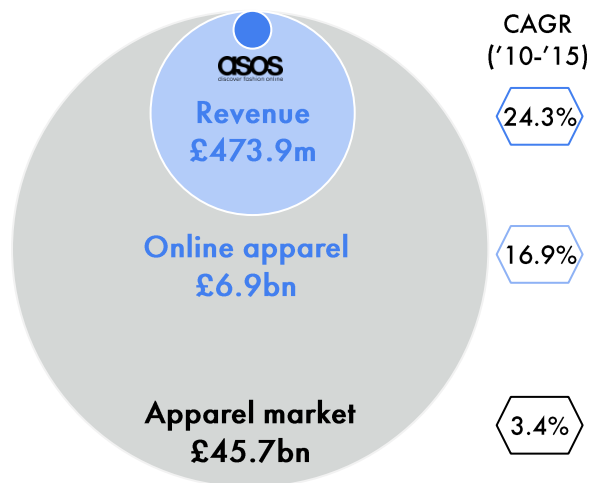
**ENGAGING CONTENT
AND EXPERIENCES**

DRIVERS OF OUR OPPORTUNITY

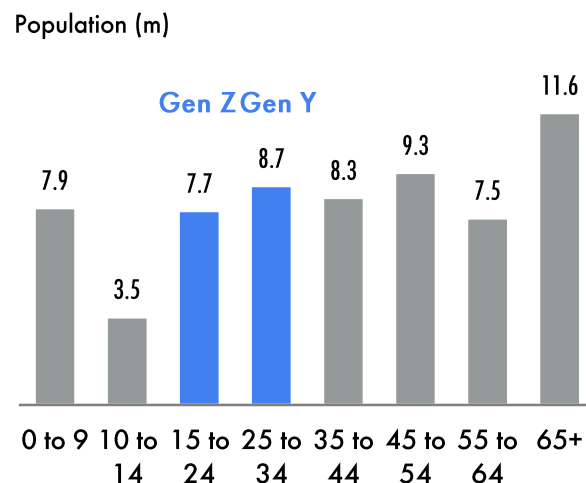


FURTHER OPPORTUNITIES IN OUR HOME MARKET

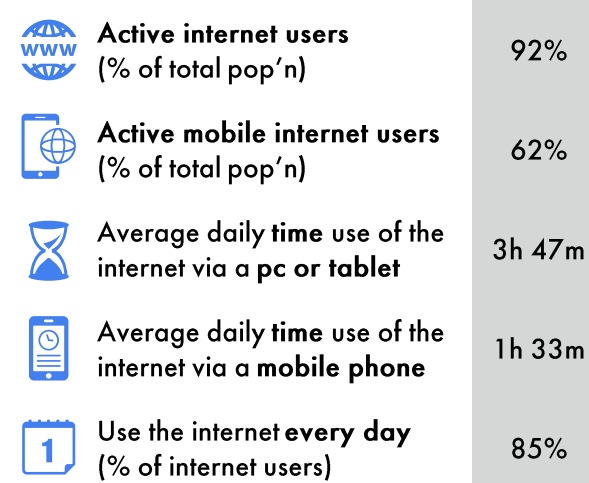
MARKET POTENTIAL



ADDRESSABLE POPULATION

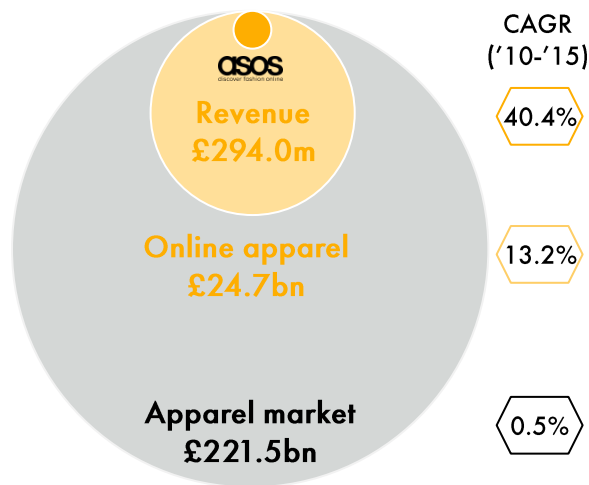


INTERNET PENETRATION

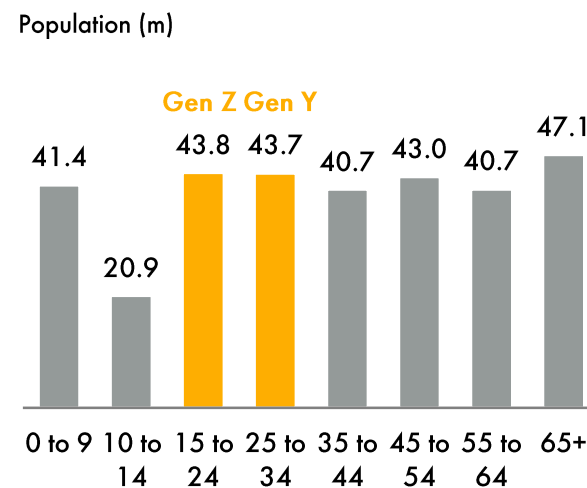


REPLICATING OUR UK PROPOSITION IN EUROPE

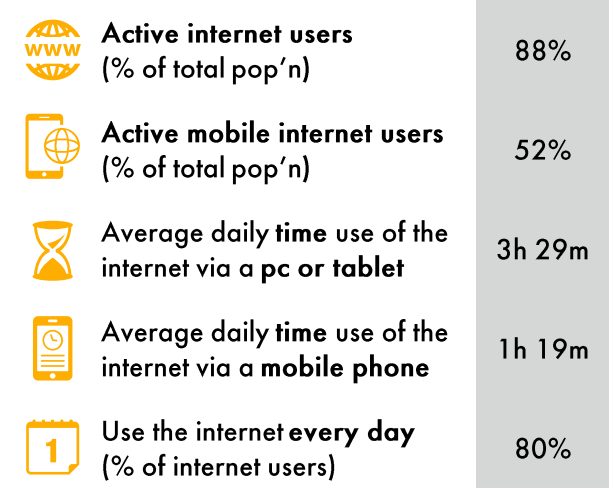
MARKET POTENTIAL



ADDRESSABLE POPULATION



INTERNET PENETRATION

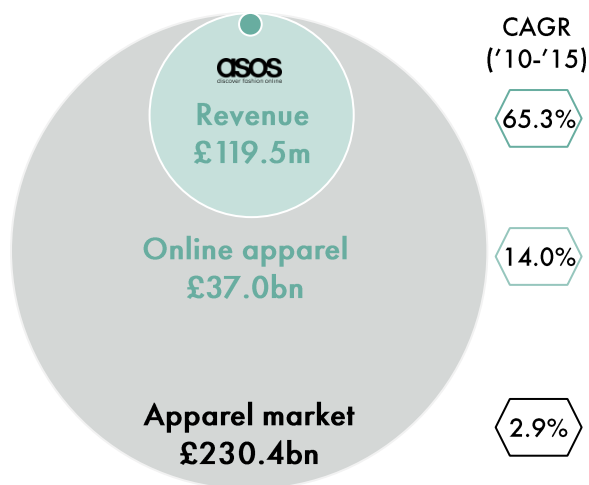


Source: Conlumino – total apparel and online apparel from all channels (clothing and footwear); EIU Population data; We Are Social, Digital in 2016

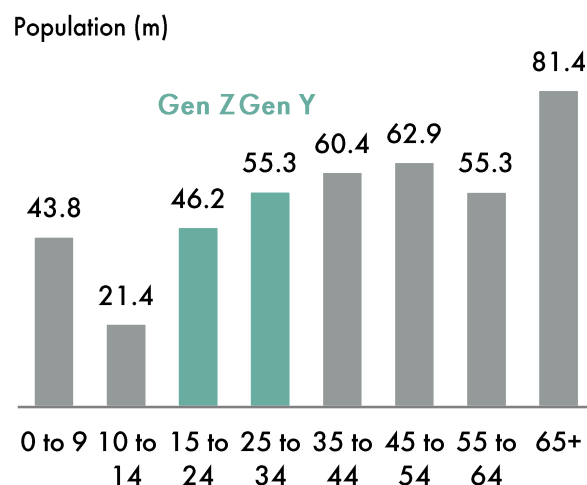
Note: Internet penetration statistics are the average statistics of France and Germany

THE U.S. OPPORTUNITY

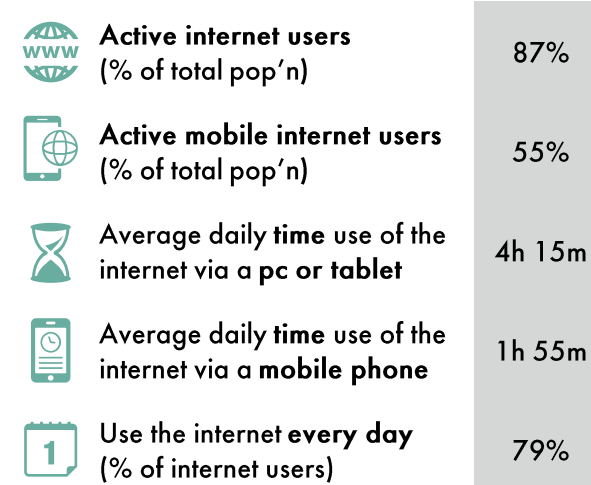
MARKET POTENTIAL



ADDRESSABLE POPULATION

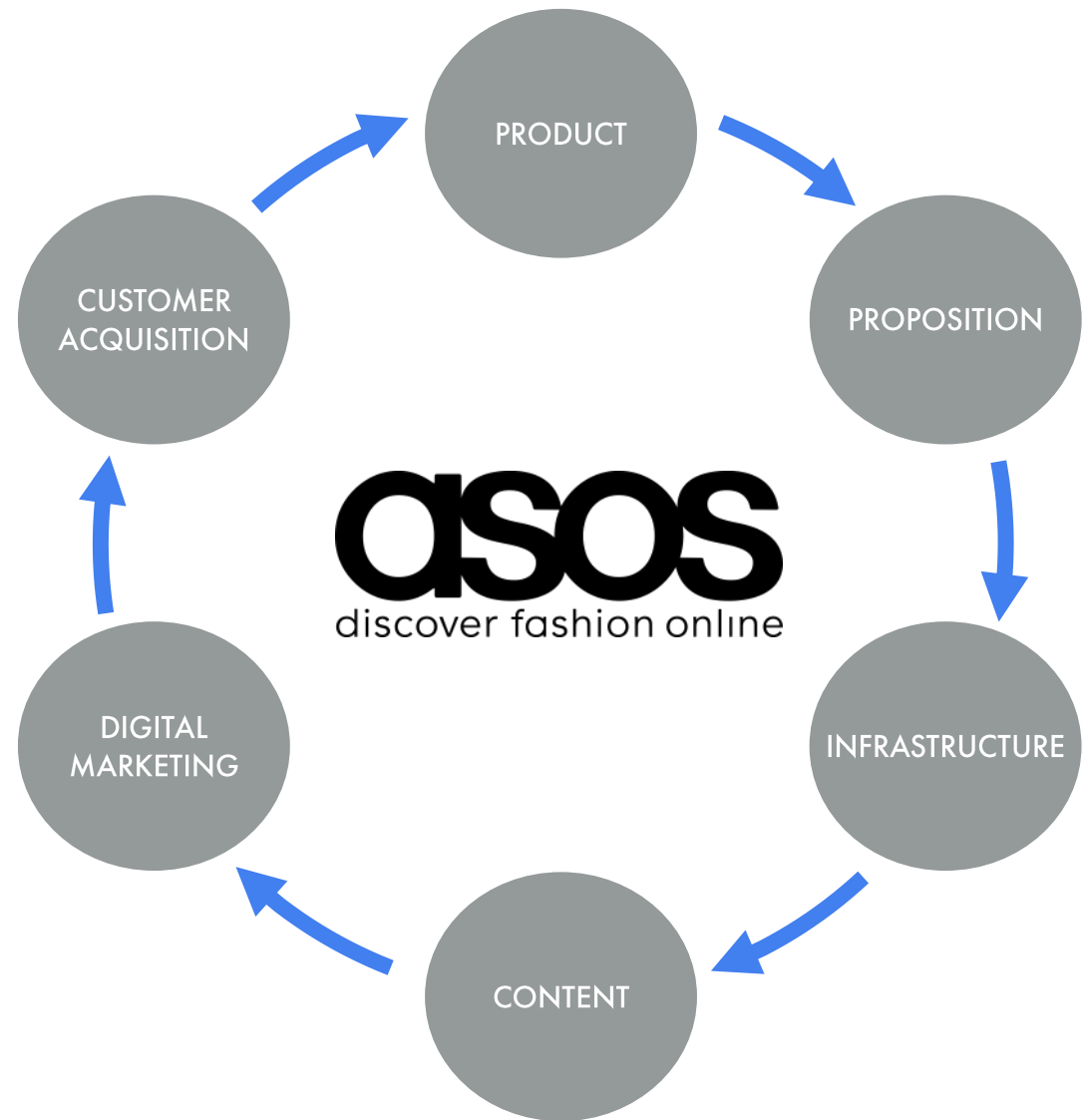


INTERNET PENETRATION





ASOS PERPETUAL CYCLE OF GROWTH



3

FINANCIAL PERSPECTIVES

HELEN ASHTON – CFO

asos





UNIQUE POSITION TO CAPITALISE ON OPPORTUNITIES

**SIGNIFICANT
OPPORTUNITIES**

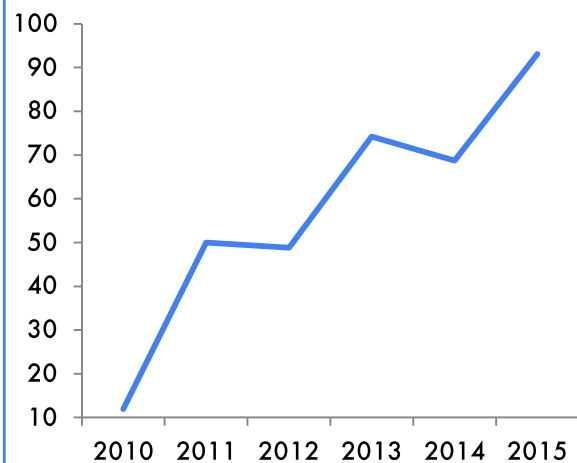
**FINANCIAL
STRENGTH**

**UNDERSTAND
OUR CUSTOMERS**

FINANCIAL STRENGTH

CASH GENERATIVE

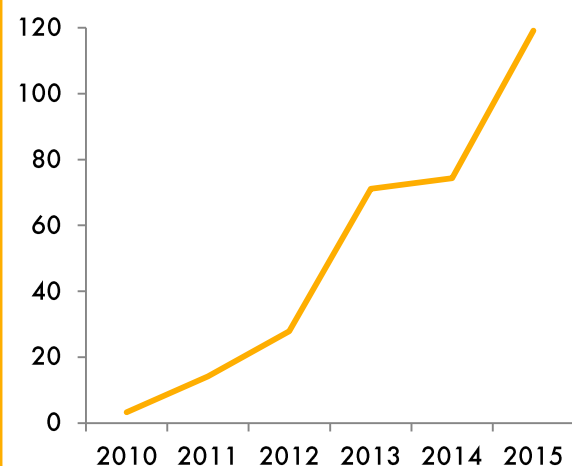
Net cash generated from ops (£m)



**HIGHLY CASH GENERATIVE BUSINESS
AND TRACK RECORD OF GROWTH**

INTERNALLY FUNDED

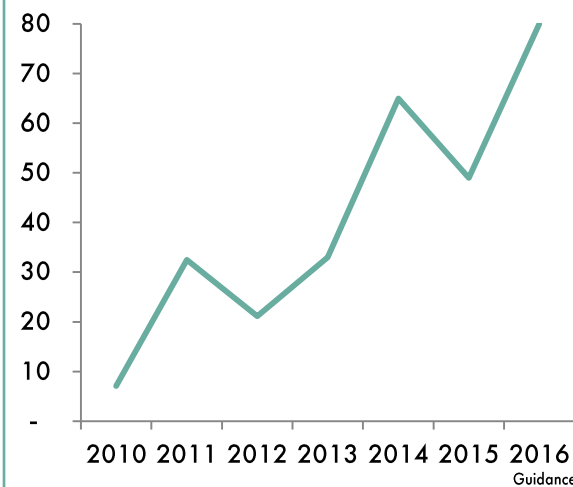
Cash balance (£m)



**NEVER ACCESSED EXTERNAL
EQUITY OR DEBT CAPITAL MARKETS**

FIREPOWER TO INVEST

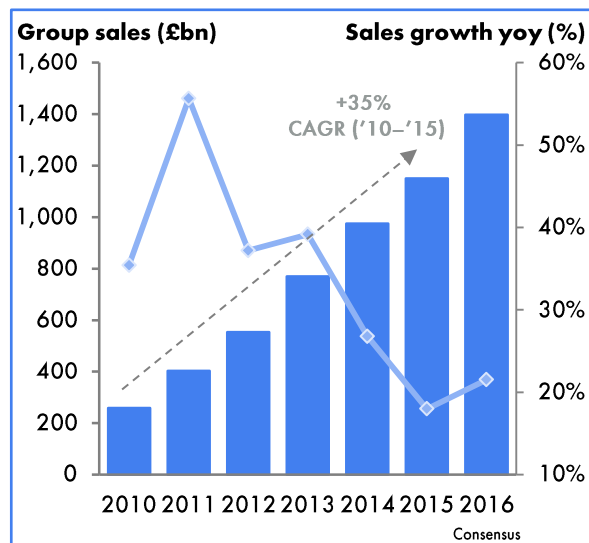
Capex (£m)



**ABILITY TO INVEST IN OPPORTUNITIES
IN A RESPONSIVE AND ADAPTIVE WAY**

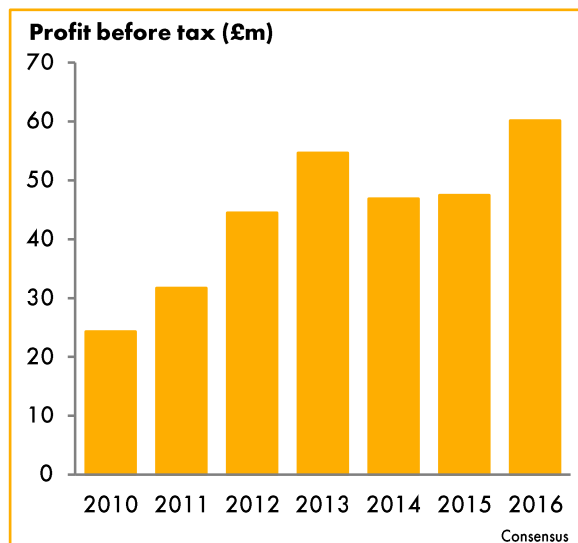
DISCIPLINED APPROACH TO DELIVERING PROFIT

SALES GROWTH



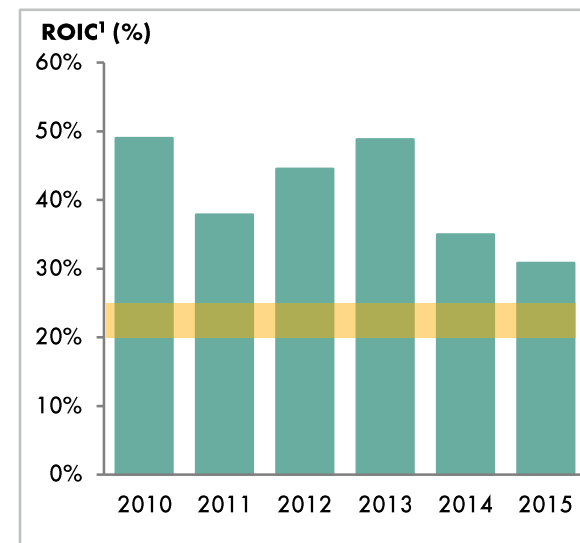
**STRONG TRACK RECORD OF
DOUBLE DIGIT SALES GROWTH**

PROFIT DELIVERY



**CONSISTENT DELIVERY OF PROFIT –
A MEASURE OF INTERNAL DISCIPLINE**

SUSTAINABLE ROIC



**HIGH ROIC – ENSURING INVESTMENTS
CONTINUALLY ADD VALUE**

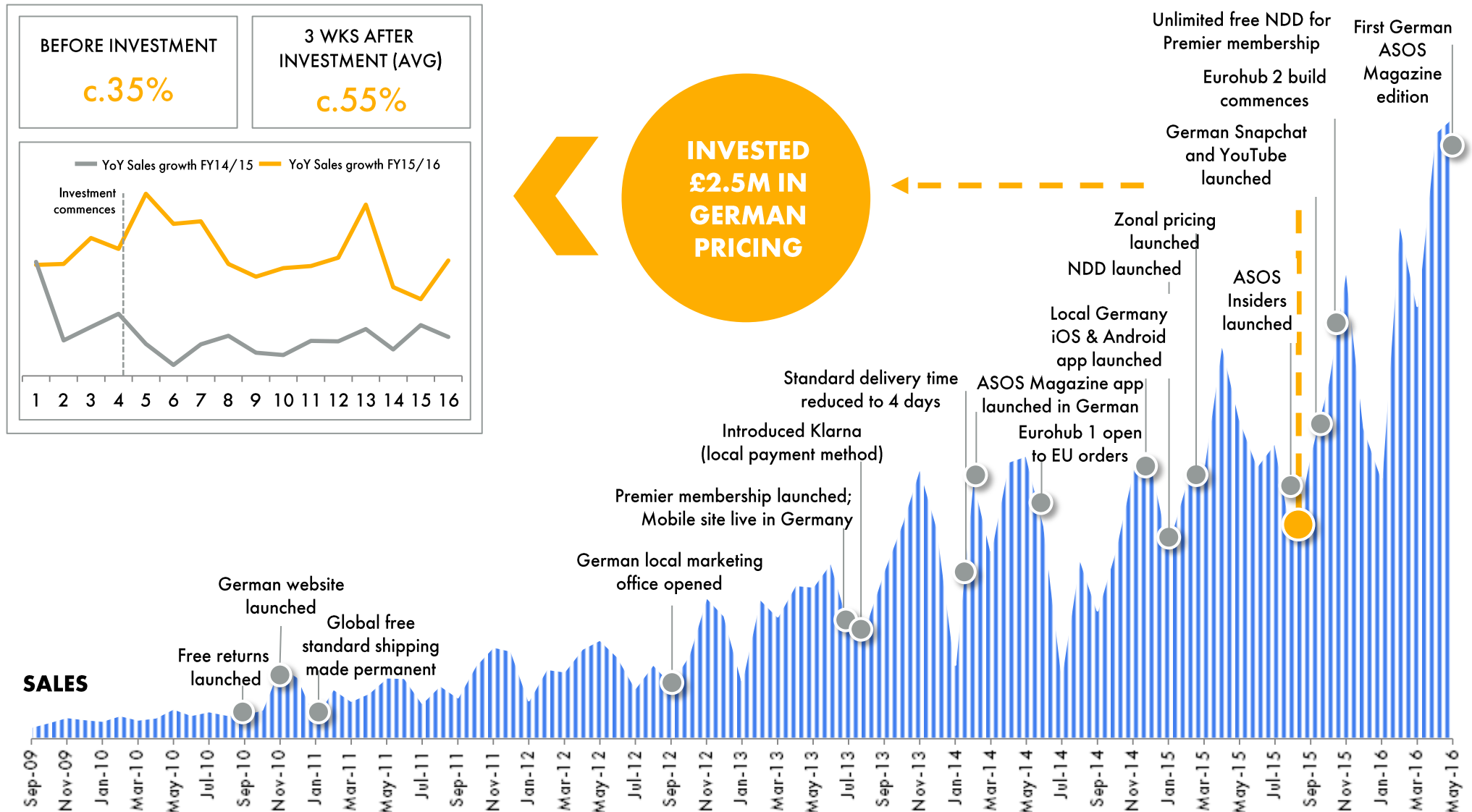
Note: ¹ ROIC = earnings before interest but after tax, divided by average invested capital (net assets minus cash balance)



PROVEN TRACK RECORD OF REINVESTING FOR GROWTH

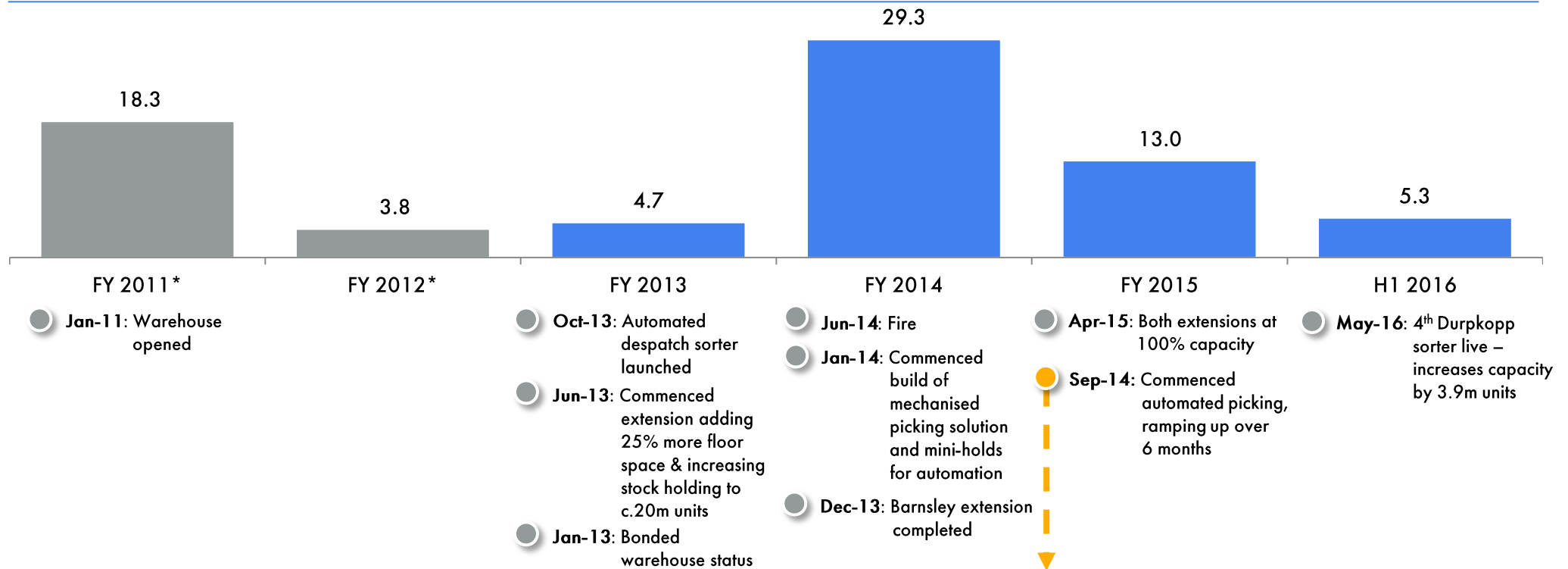


REINVESTMENT OF OPERATIONAL LEVERAGE: GERMAN CASE STUDY



CAPITAL INVESTMENT: BARNSELEY CASE STUDY

BARNSELEY CAPEX SPENT SINCE INCEPTION (£M)

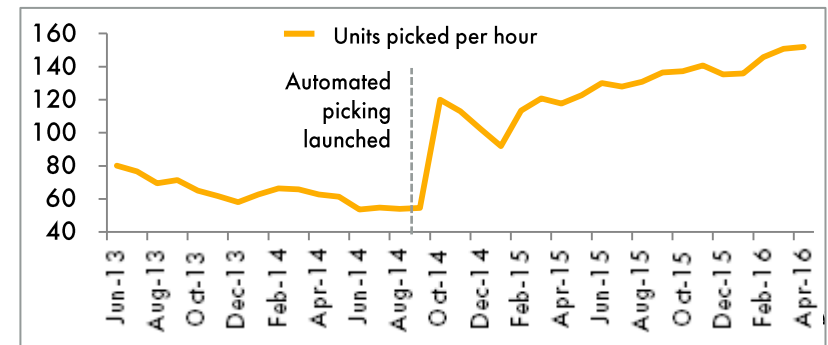


**COMMENCED
AUTOMATED
PICKING,
RAMPING UP
OVER 6 MTHS**



BEFORE LAUNCH
c.55uph

**IMMEDIATELY
AFTER LAUNCH**
c.120uph



INVESTMENT FOCUS IN KEY STRATEGIC AREAS

WAREHOUSING



- Eurohub 2 Phase 1
- Eurohub 2 Phase 2/3 (automation)
- US warehouse

DISTRIBUTION



- PUDO locations (EU)
- Faster delivery times (EU)
- More delivery options (US)

PEOPLE



- Resource
- People development



TECHNOLOGY



- Next generation platforms
- Customer experiences (including mobile)
- Technology innovation

ENGAGEMENT



- A-List
- Content (EU & US)
- Data and personalisation

PRODUCTION



- Innovative technology
- Additional studios

SUMMARY: FINANCIAL DISCIPLINES TO FUEL OUR GROWTH



LEVERAGING
COST BASE

OPTIMISING
EBIT MARGIN

DRIVING
STRONG ROIC

4

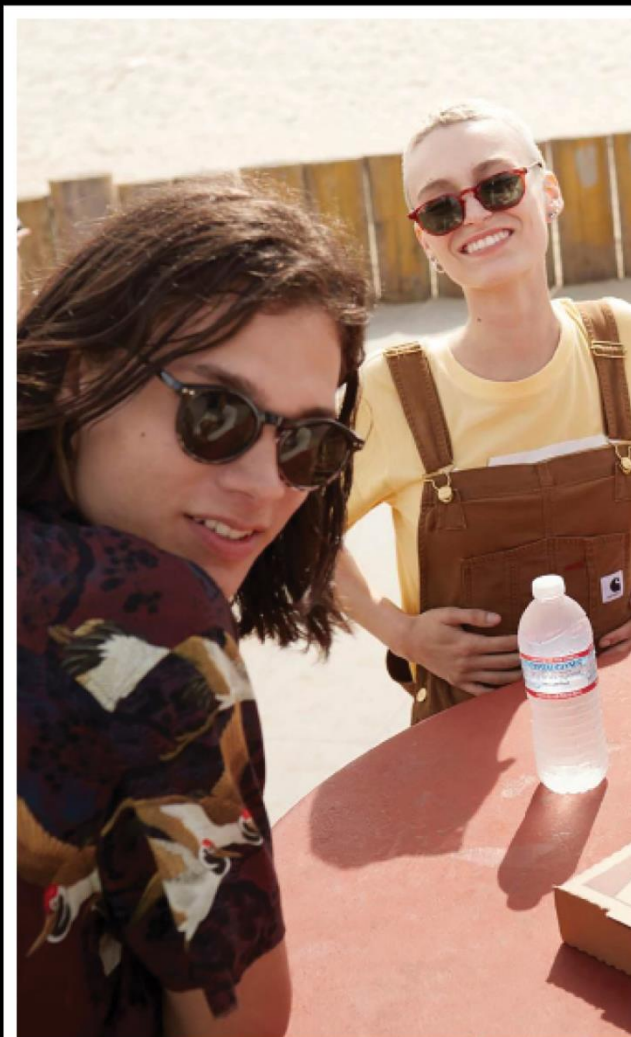
TECHNOLOGY

CLIFF COHEN – CIO

BOB STRUDWICK – CTO

ANDREA TROCINO – HEAD OF MOBILE

asos



MY EARLY OBSERVATIONS

THE RIGHT TECHNOLOGY **STRATEGY**



BUT... WE NEEDED TO FOCUS ON **EXECUTION**

STRONG **TECHNICAL TALENT**



BUT... WE DIDN'T HAVE ENOUGH OF THE
RIGHT PEOPLE OR THE **RIGHT LEADERSHIP**

CLEAR FOCUS ON **MOBILE**



AND... THERE WAS SO MUCH MORE
OPPORTUNITY AHEAD OF US

FUNCTIONALLY RICH PLATFORM



BUT... WE NEEDED TO INCREASE THE
VELOCITY OF CHANGE



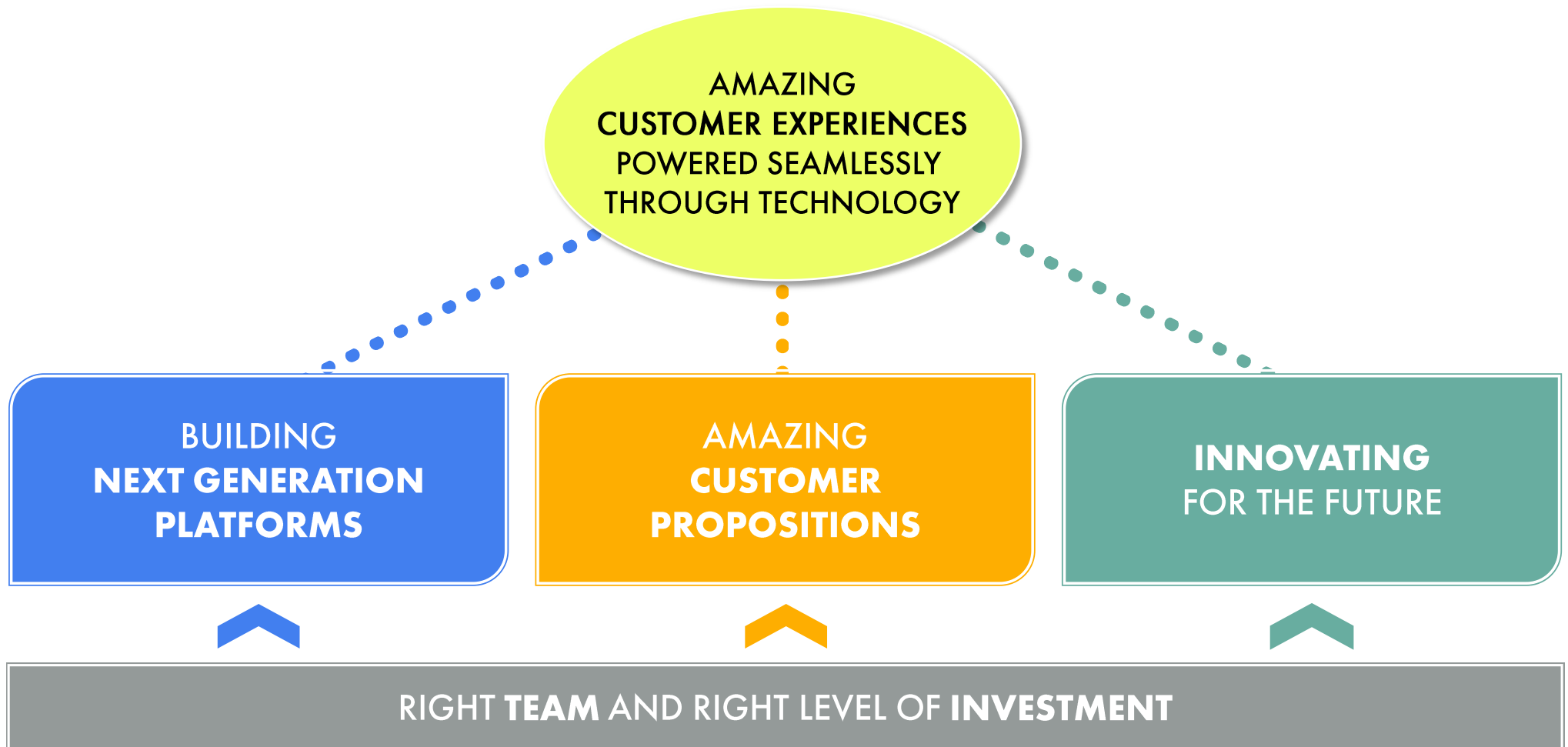
CUSTOMER CENTRIC INNOVATION

**SIGNIFICANT
OPPORTUNITIES**

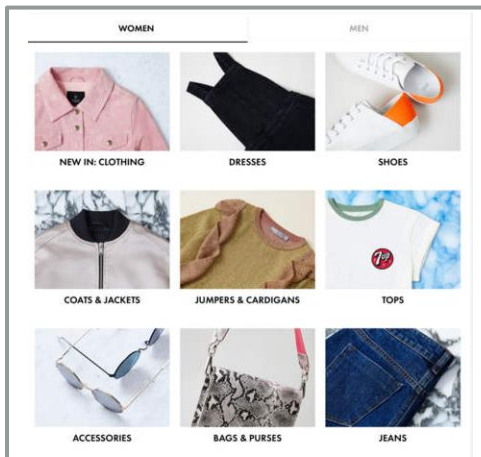
**FINANCIAL
STRENGTH**

**UNDERSTAND
OUR CUSTOMERS**

TECHNOLOGY STRATEGY



NEXT GENERATION RETAIL SYSTEMS



c.80,000
PRODUCTS
LIVE

>850
BRANDS

[illegible]

c.4,000
NEW PRODUCTS
EACH WEEK

6 PRICE ZONES



ENABLES US TO THINK **GLOBALLY** ABOUT EVERYTHING WE DO

NEXT GENERATION RETAIL SYSTEMS

NEW MERCHANDISE OPERATIONS, PRICING, FINANCIAL AND ASSORTMENT PLANNING SYSTEMS

CUSTOMER CHOICE



TAILORED PRODUCT OFFER

PRICE PRODUCTS



MARKET RELEVANT PRICES

**PLAN, BUY AND
MANAGE STOCK**

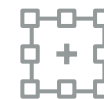


QUICKER DELIVERY OF STOCK

WEB CLICKSTREAM DATA



**REAL TIME, EXCEPTION
BASED PROCESSES**



NEW DIGITAL PLATFORM

A NEW DIGITAL PLATFORM

EXISTING PLATFORM

NEW PLATFORM

OUTCOME

SCALABILITY

DIFFICULT TO SCALE



SCALE **FASTER**
AND **FURTHER**

- Potential to operate at 30 orders per second vs. 9 orders per second last Black Friday

FLEXIBILITY

COMPLEX TO MODIFY



CHANGE AND **ADD**
FUNCTIONALITY **EASILY**

- Capability to double the number of releases on the platform

RESILIENCE

DEPLOYED IN OUR
DATA CENTRE



DEPLOYED IN THE
CLOUD

- Multiple data centre infrastructure designed for greater resilience, global reach and consistent customer performance

NEW DIGITAL PLATFORM

BACK-END SOFTWARE SERVICES

- 'Back-end' software services controlling all the core logic and processing
- APIs used to communicate with these services



FRONT-END CUSTOMER EXPERIENCES

- New 'front-end' customer experiences through our mobile apps, mobile web, desktop and tablet sites



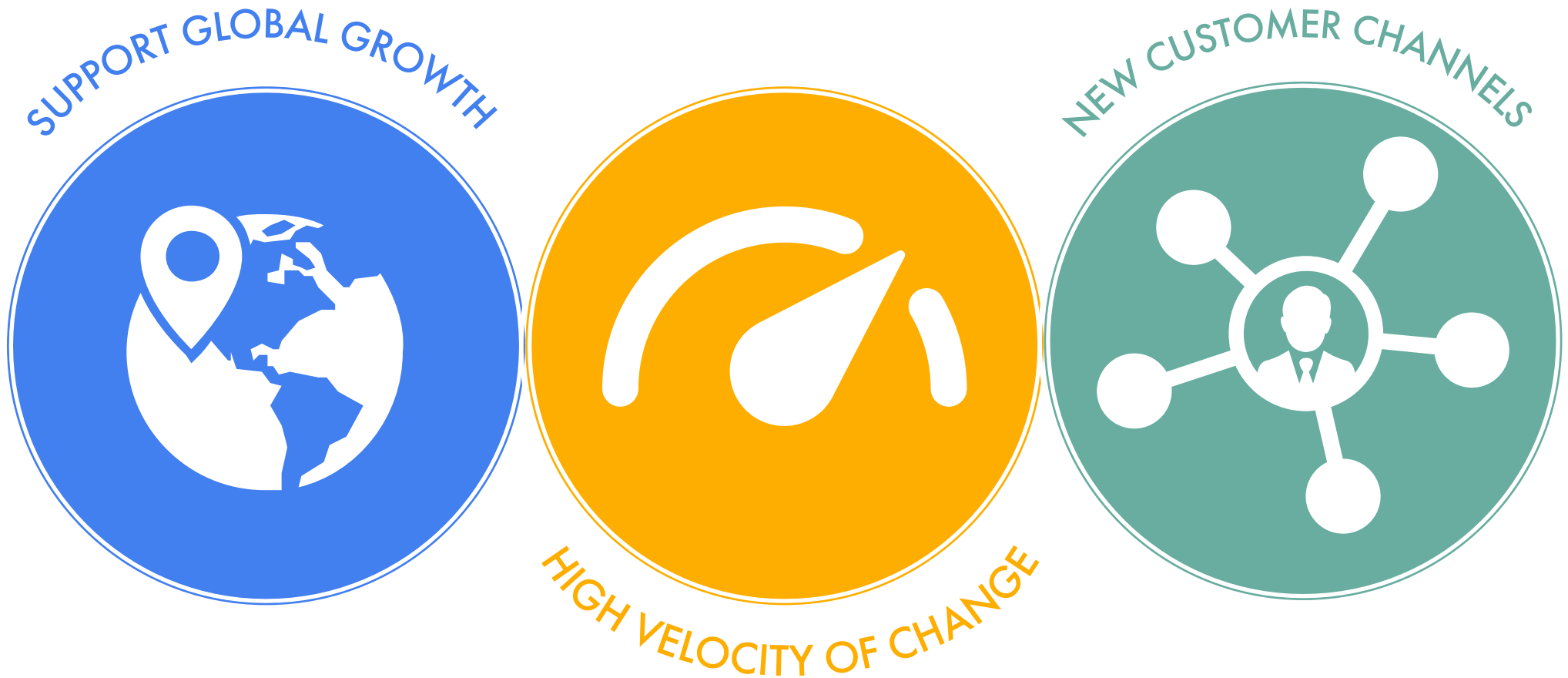
- 
- **FLEXIBILITY AND AGILITY**
 - **CHANNEL AGNOSTIC**



ARCHITECTURE

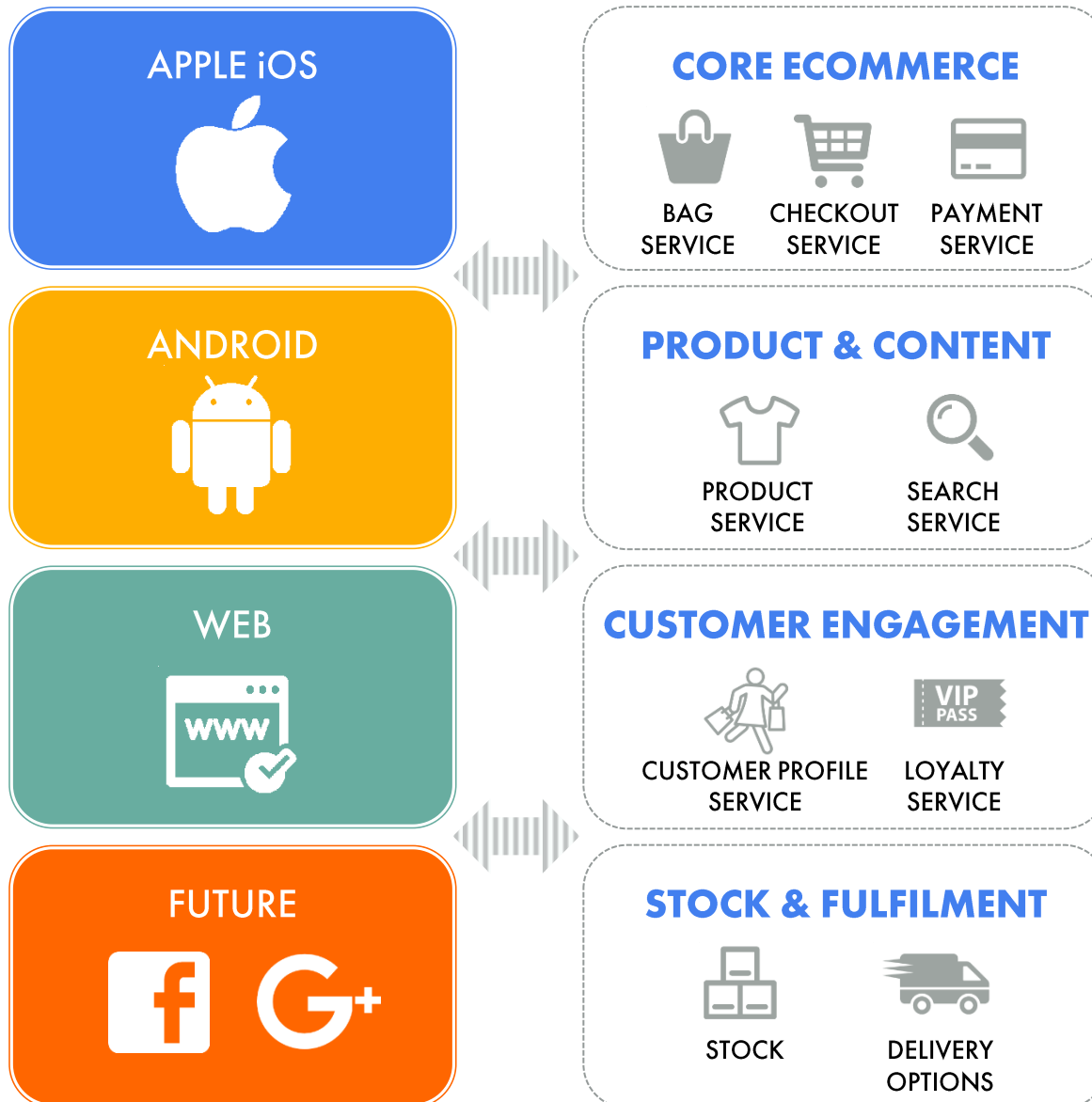
BOB STRUDWICK – CTO

DIGITAL PLATFORM VISION



DELIVERING THE **BEST CONSUMER EXPERIENCE** WHEREVER IN THE WORLD YOU MAY BE

MICROSERVICE ARCHITECTURE

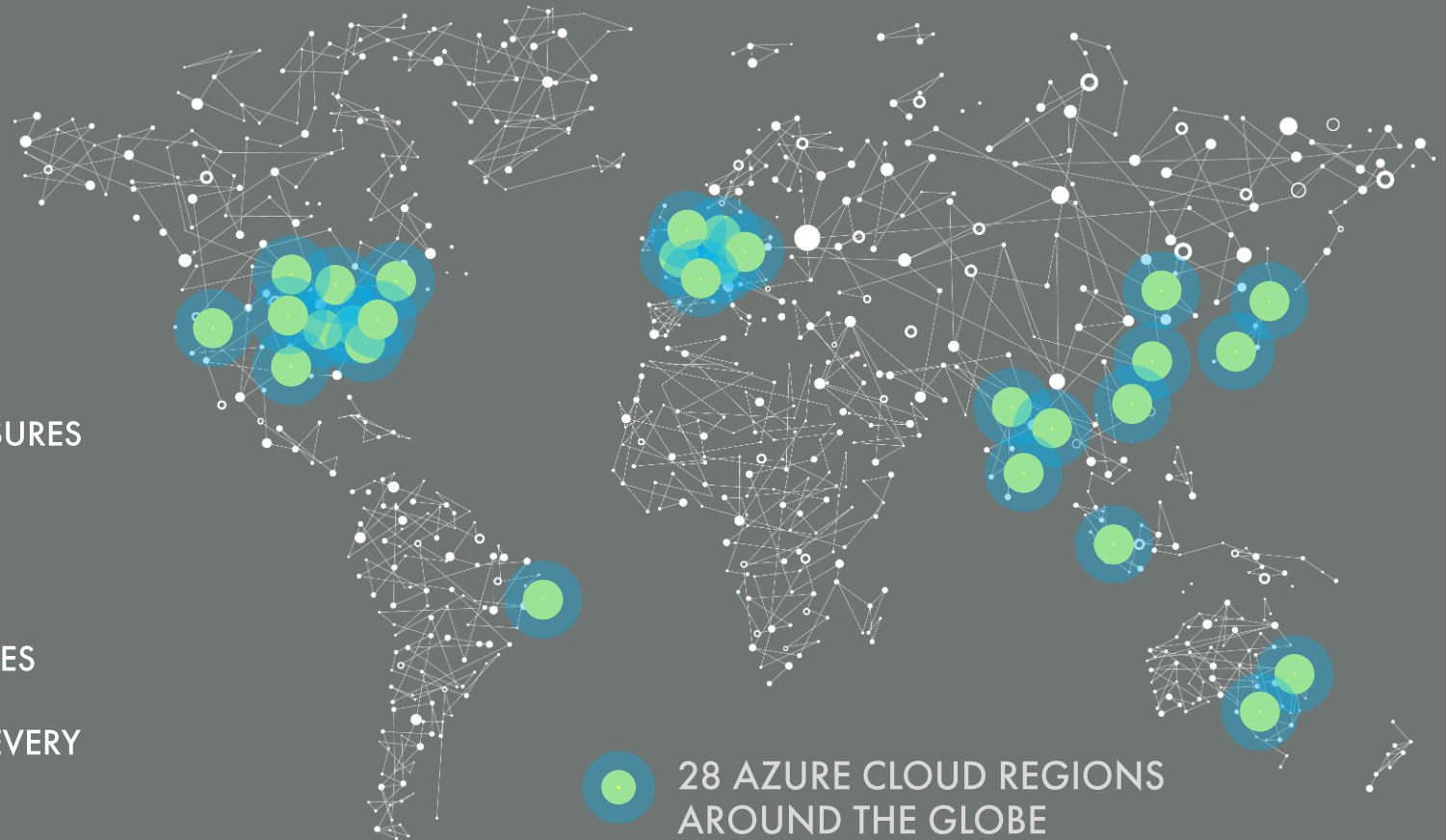


- EACH APPLICATION SERVICE IS **INDEPENDENT** FROM EACH OTHER
- SUITE OF SERVICES CAN BE **DEPLOYED IN ANY COMBINATION**
- EACH SERVICE CAN RETURN DATA IN **ANY LANGUAGE**
- **APPLICATION SERVICES SEPARATE** FROM FRONT END APPLICATIONS

ROLLING OUT TO THE CLOUD

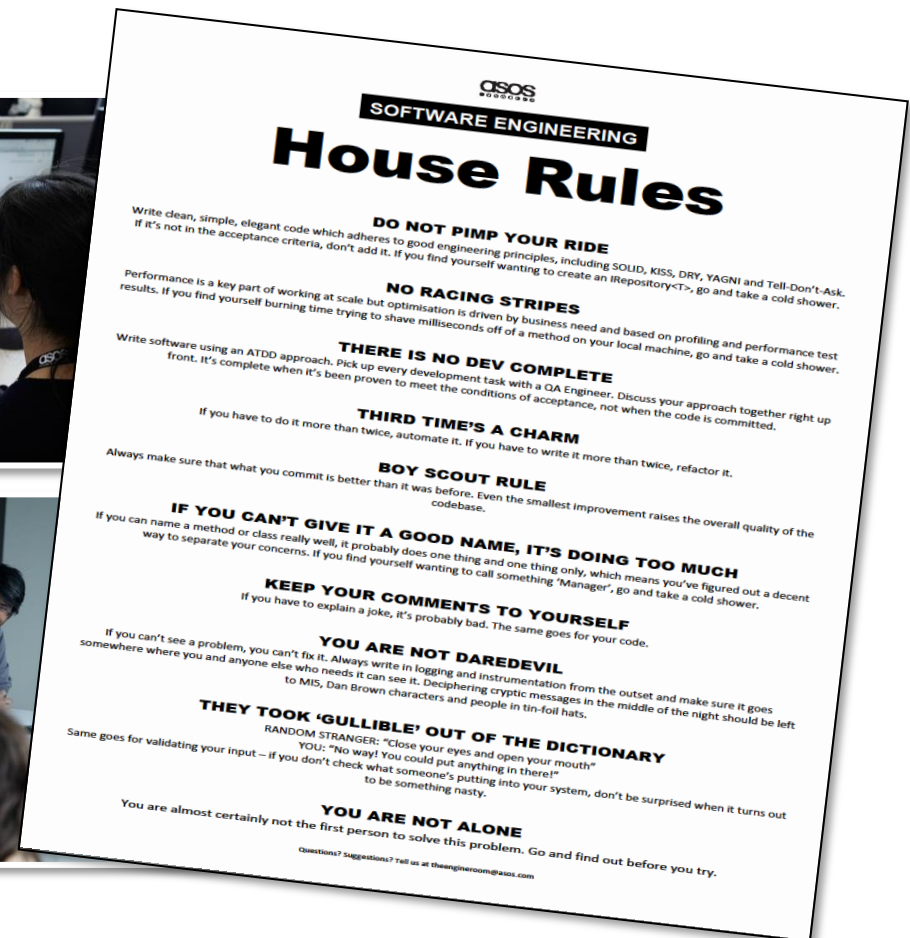
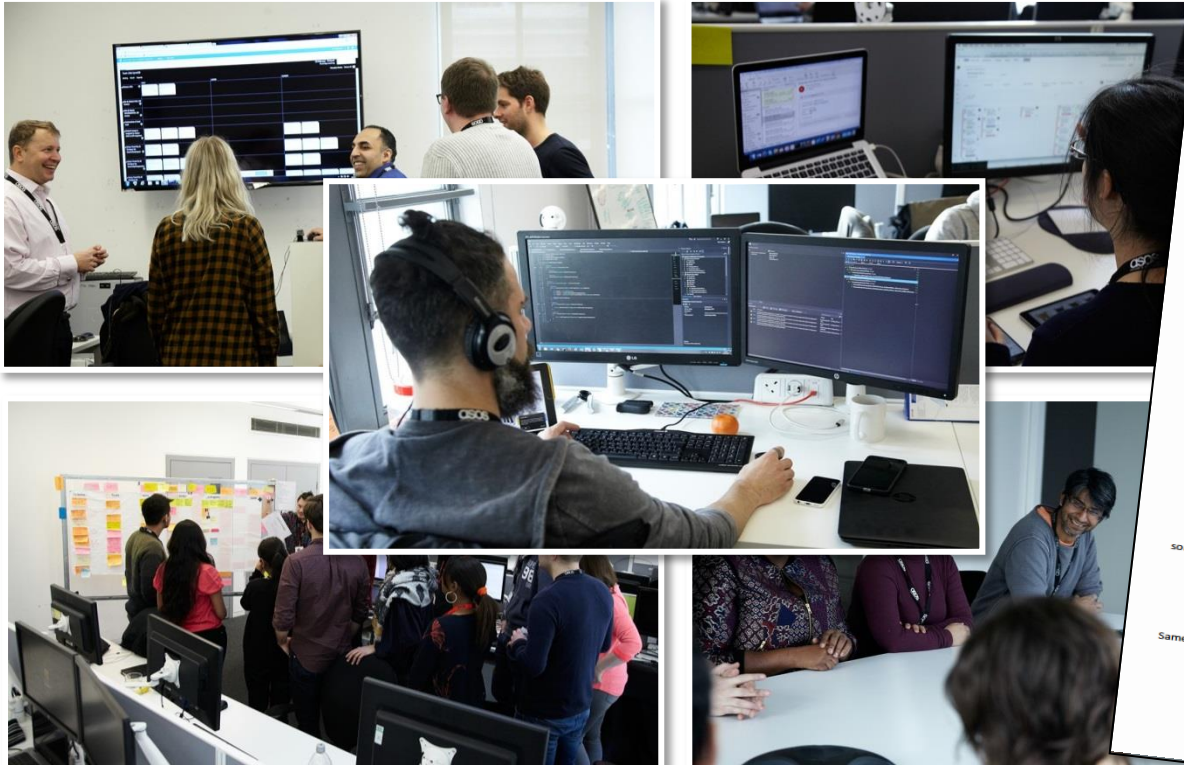


- **DEPLOY AS NEAR AS POSSIBLE TO THE CONSUMER**
- **BUILT-IN RESILIENCE ENSURES MAXIMUM UPTIME**
- **DEPLOY ANY COMBINATION ACROSS 28 DATA CENTRES**
- **MICROSOFT WITH US EVERY STEP OF THE WAY**



ROLLING OUT TO THE CLOUD GIVES US **GLOBALLY CONSISTENT PERFORMANCE AND UPTIME** FOR OUR CUSTOMERS

STRONG ENGINEERING LEADERSHIP AND CULTURE



THE **STRONGEST** ARCHITECTURE AND ENGINEERING TEAM ASOS HAS EVER HAD

FLAT, AUTONOMOUS ORGANISATIONAL FRAMEWORK

NATIVE MOBILE



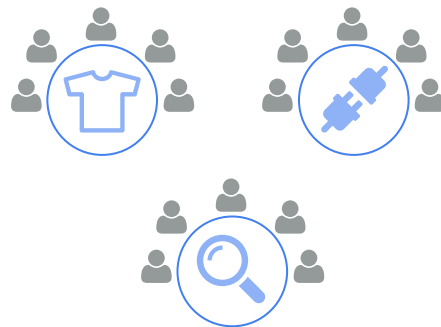
MOBILE WEB, WEB



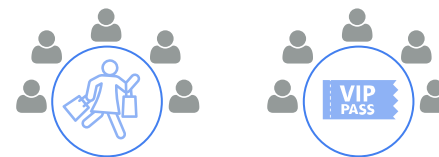
CORE ECOMMERCE



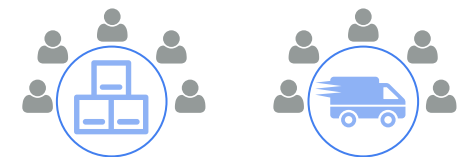
PRODUCT & CONTENT



CUSTOMER ENGAGEMENT

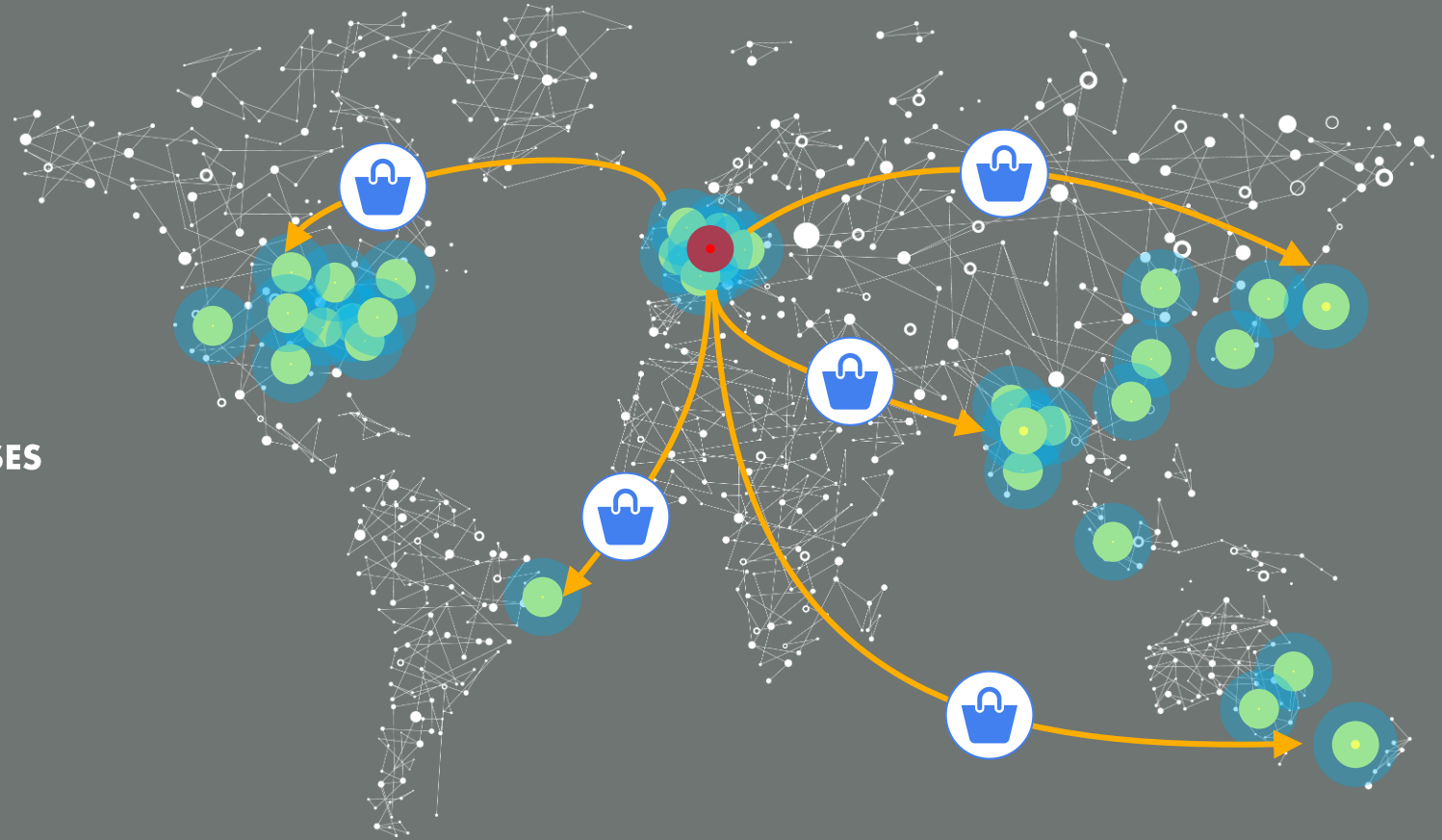


STOCK & FULFILMENT



EXPERTISE IN SOFTWARE DEVELOPMENT AND TEST AUTOMATION

- HEAVY INVESTMENT IN **AUTOMATION** OVER 5 YEARS
- 360 **SOFTWARE RELEASES** LAST YEAR
- SECOND GENERATION TOOLING



LEADING EDGE AUTOMATED SOFTWARE BUILD AND DEPLOYMENT TECHNOLOGY
TO BACKUP OUR NEW DIGITAL PLATFORM



MOBILE

ANDREA TROCINO – HEAD OF MOBILE

ASOS MOBILE VISION

OUR VISION IS...

TO FUNDAMENTALLY CHANGE THE WAY

OUR CUSTOMERS LIVE AND SHOP FASHION ON MOBILE

AWESOME ON MOBILE

1

CUSTOMER ENGAGEMENT

Delight our customers
providing inspiration,
engagement and excitement
about fashion

2

TECH INNOVATION

Stay ahead of our customers
expectations using the latest
Mobile technology
advancements

3

SHOPPING EXPERIENCE

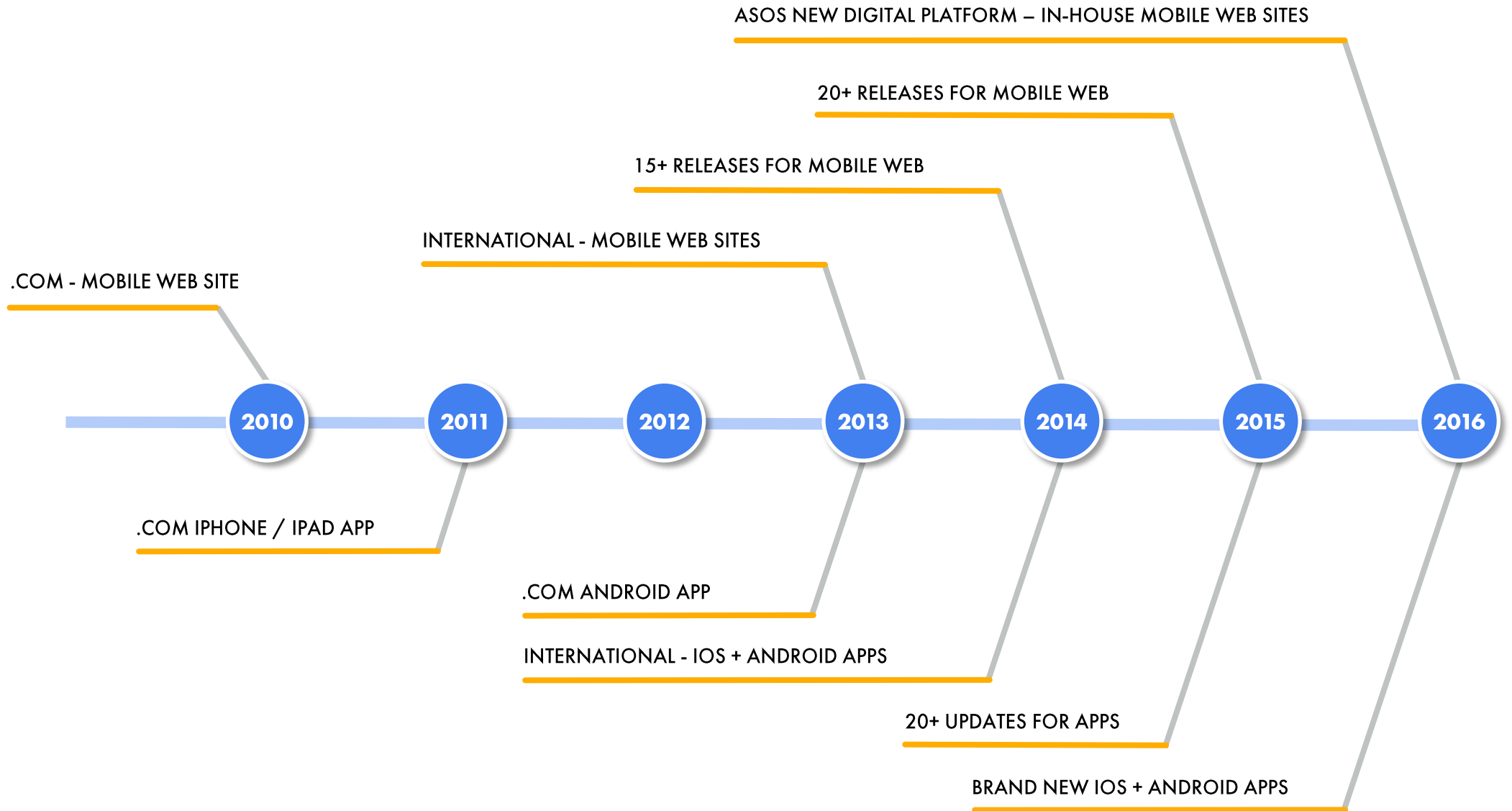
Deliver the most enjoyable
and frictionless shopping
experience available on
Mobile



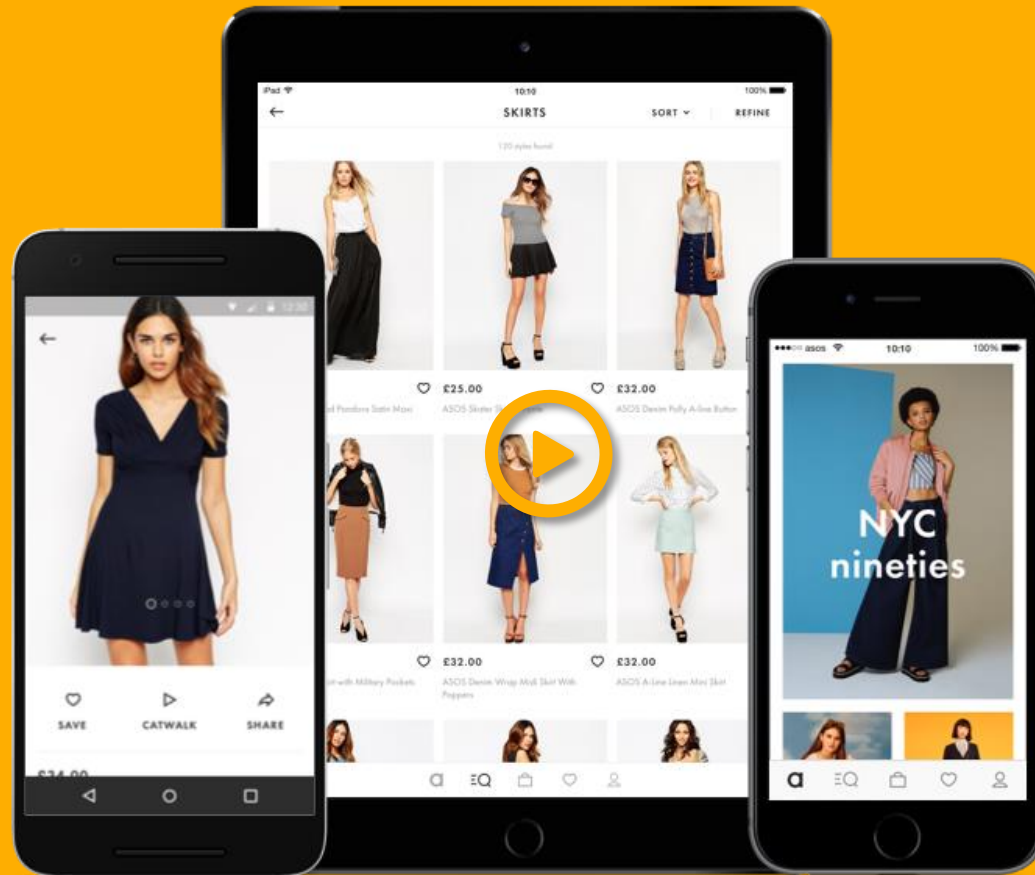
1 CUSTOMER ENGAGEMENT

WE HAVE TAKEN THE
RIGHT STEPS AT THE
RIGHT TIME TO
DELIGHT OUR CUSTOMERS

OUR MOBILE JOURNEY



OUR BRAND NEW iOS APP



OUR CUSTOMERS LOVE OUR APPS – ACTIVE USER BASE



ASOS
By ASOS

Editors' Choice

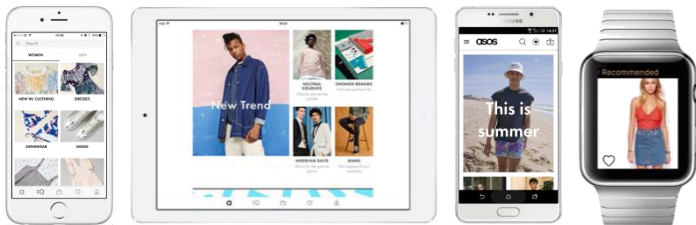


ASOS

ASOS Shopping

PEGI 3

Top Developer



iPhone /
iPod Touch

iPad / iPad Mini

Android Phone
/ Tablet

Apple
Watch

10M+

ACTIVE INSTALLS



4.8 AVERAGE RATING

on 120,000+
Customer Reviews

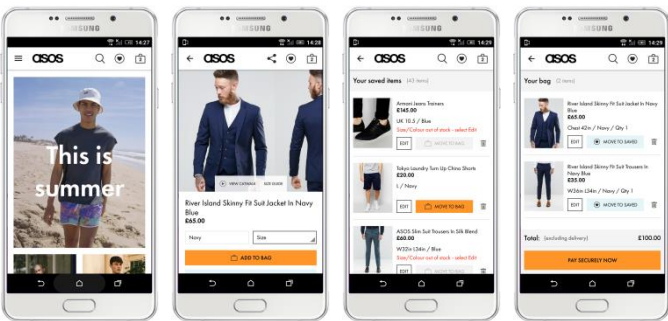
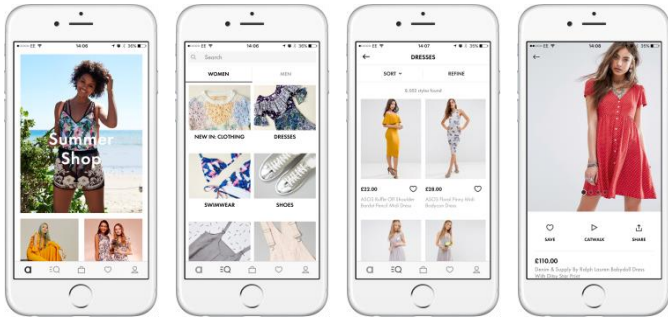
+125%

ACTIVE INSTALLS
YOY

500K+

NEW DOWNLOADS
EVERY MONTH

OUR CUSTOMERS LOVE OUR APPS – USAGE STATISTICS



8x

MONTHLY AVERAGE
FREQUENCY

**70
mins**

MONTHLY AVERAGE
TIME SPENT

+50%

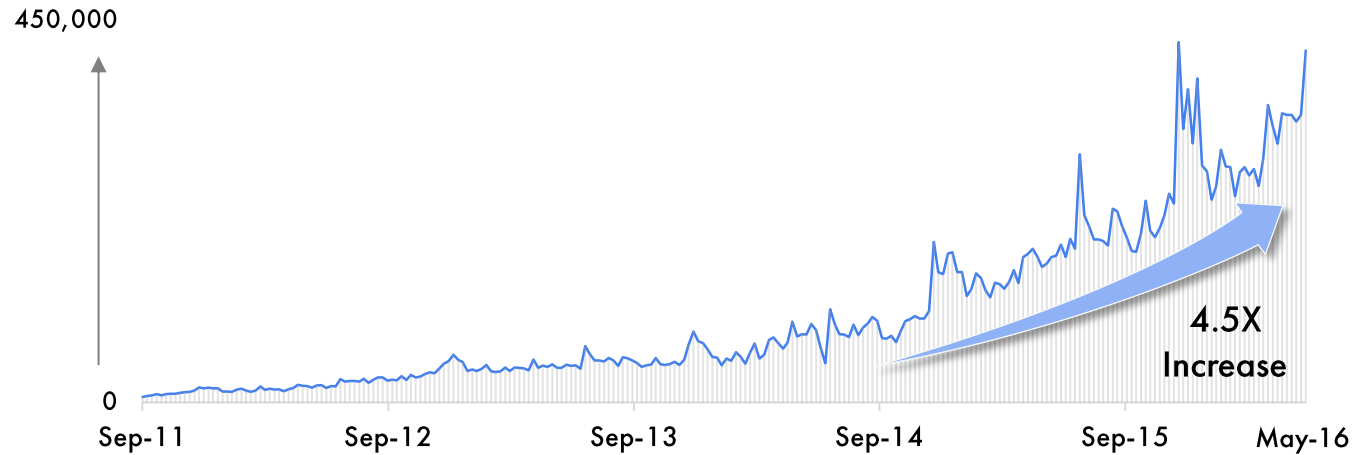
ORDER FREQUENCY

2x

PRODUCT VIEWS
IN APPS VS. DESKTOP

MOBILE ORDERS AND VISITS

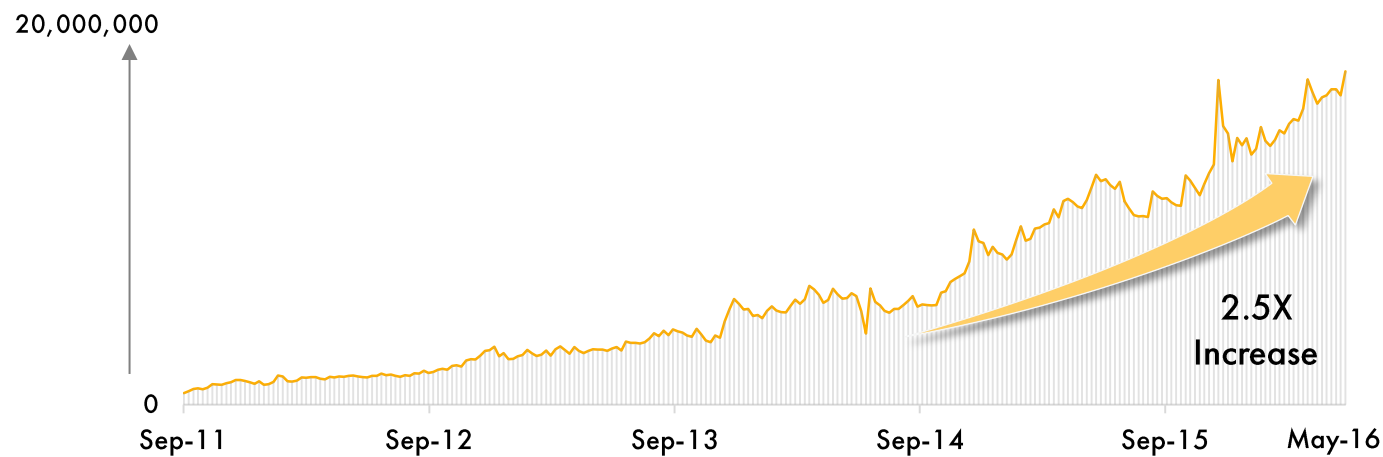
MOBILE ORDERS



+102%

MOBILE ORDERS
YOY

MOBILE VISITS



+50%

MOBILE VISITS
YOY



2

TECH INNOVATION

WE USE THE **LATEST**
MOBILE TECHNOLOGIES
TO STAY AHEAD OF OUR
CUSTOMERS' EXPECTATIONS

NEW iOS APP EXAMPLE

APPLE SWIFT



Performance



Stability



Speed to Market

iOS 9



- TouchID Login
- iPad Multitasking
- Universal Links
- Spotlight Search
- Apple Watch 2.0

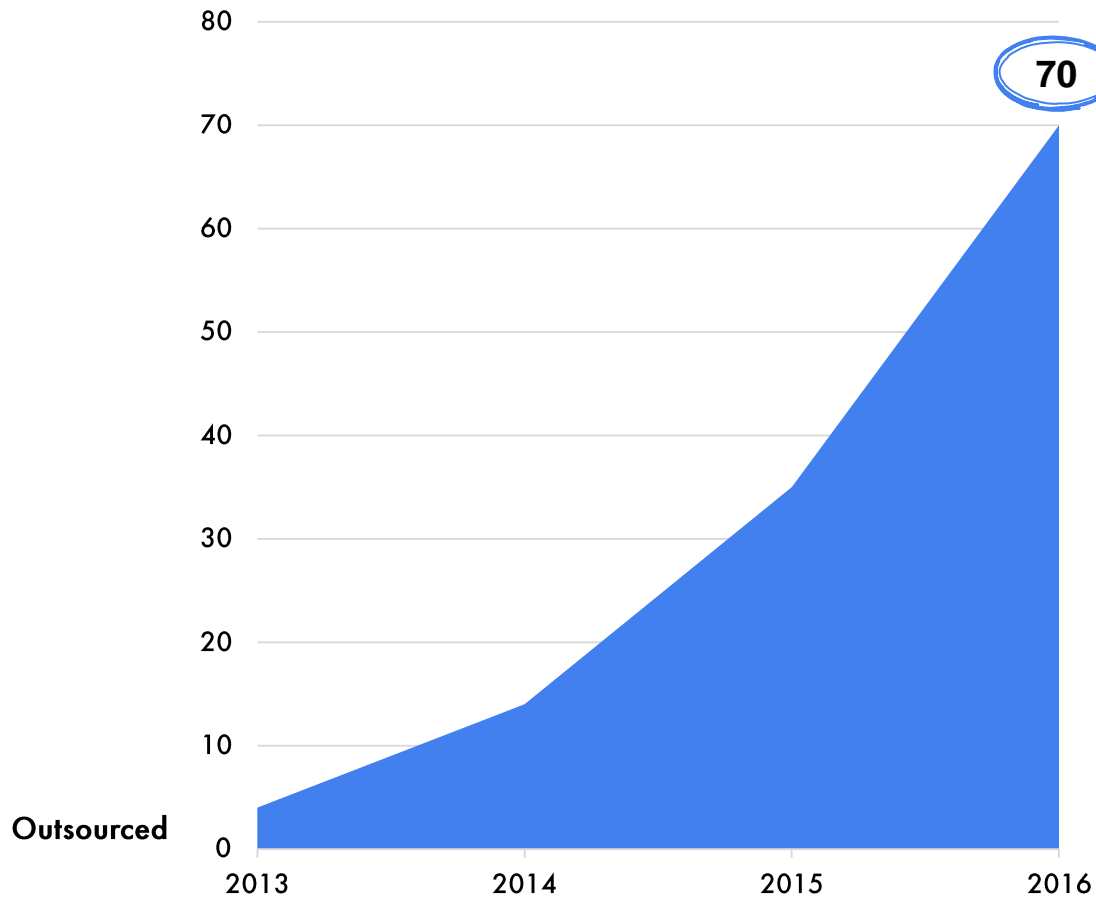
iOS 10



Coming soon...

THE RIGHT EXPERTISE

IN-HOUSE TEAM GROWTH



GLOBAL PARTNERS



Google

facebook



3

SHOPPING EXPERIENCE

DELIVER THE MOST **ENJOYABLE**
AND **FRICTIONLESS**
SHOPPING EXPERIENCE
ON MOBILE

NEXT MOBILE LAUNCHES

NEW CHECKOUT EXPERIENCE



EDITORIAL CONTENT IN APPS



NEW MOBILE WEB PLATFORM



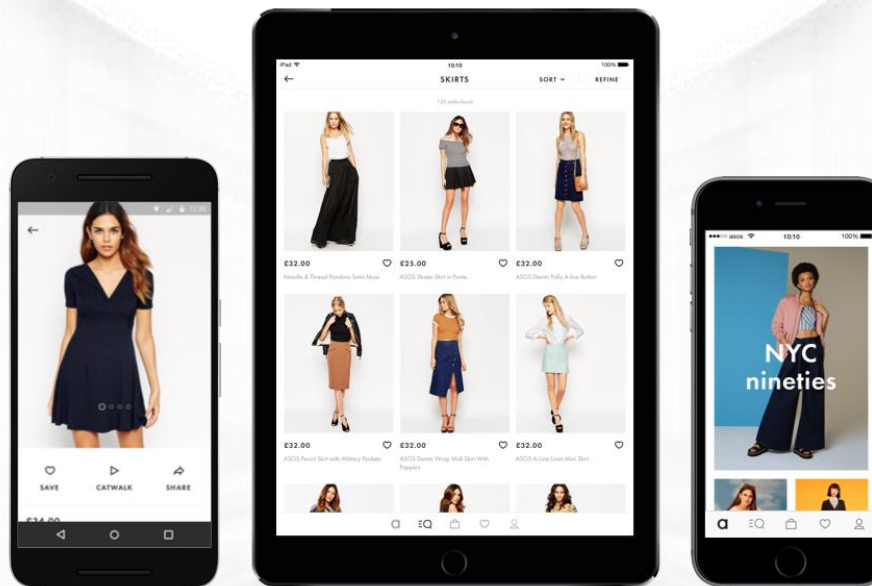
iOS 10 FEATURES



NEW ANDROID APP



APPLE PAY ANDROID PAY



ASOS MOBILE VISION

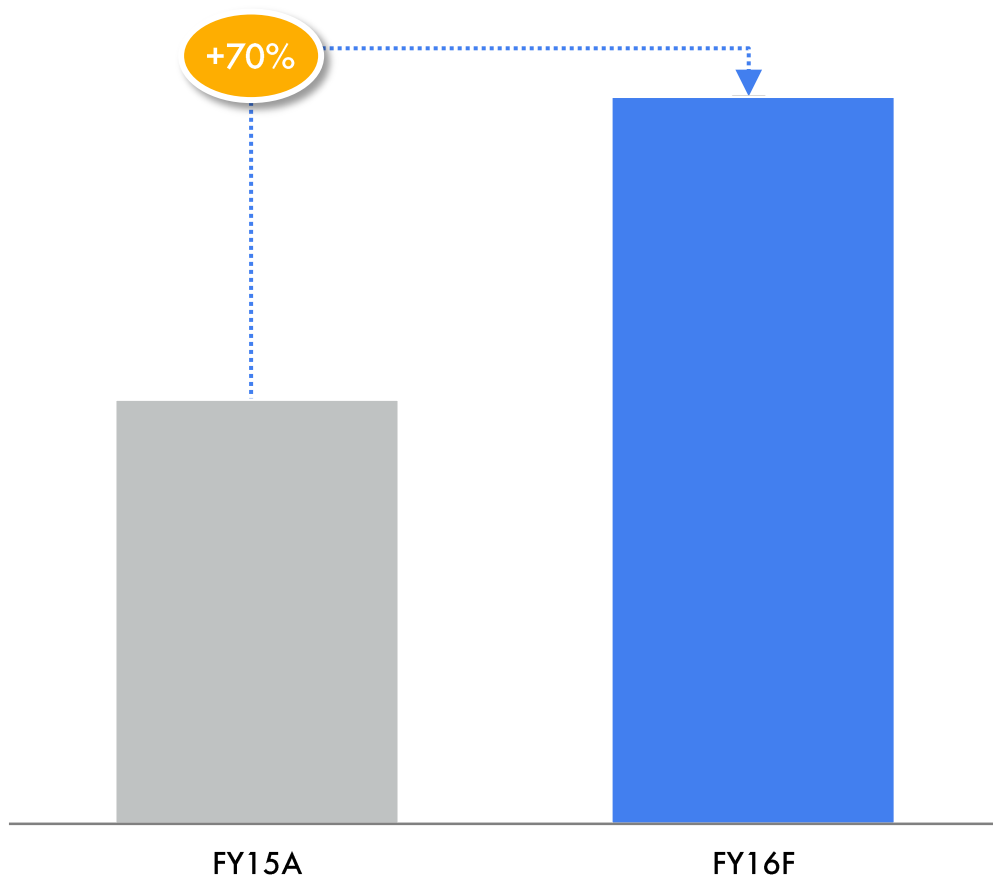
OUR VISION IS...

TO FUNDAMENTALLY CHANGE THE WAY

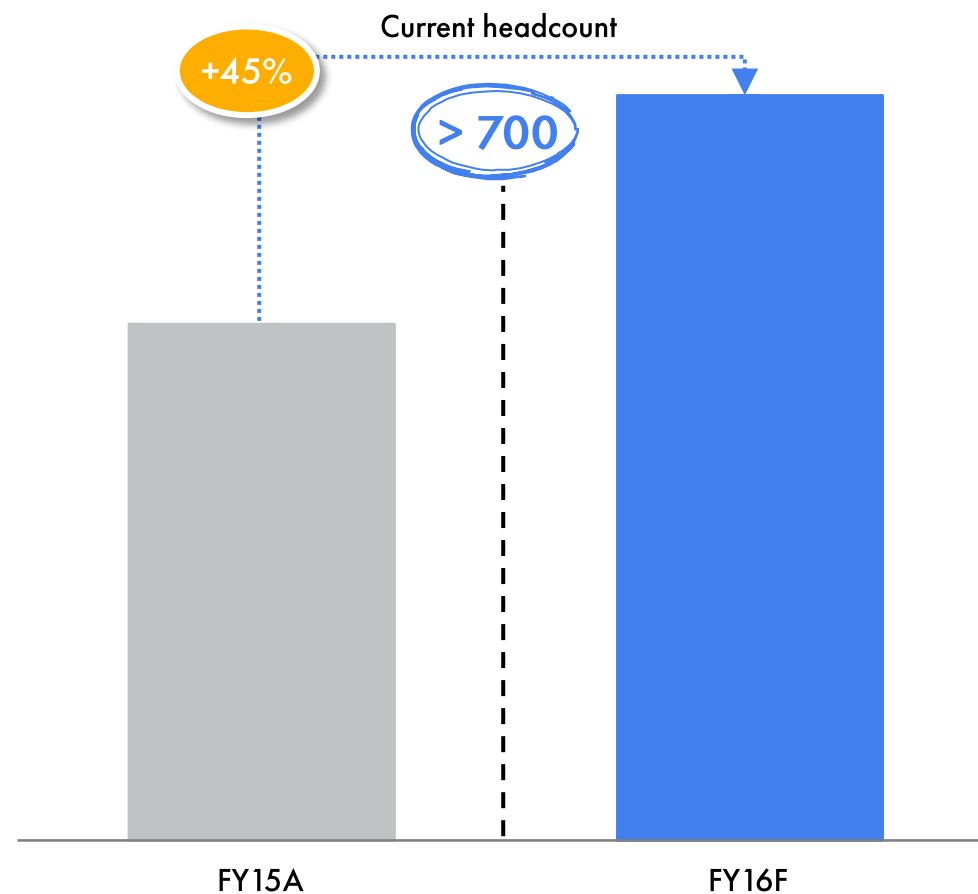
OUR CUSTOMERS LIVE AND SHOP FASHION ON MOBILE

TECHNOLOGY INVESTMENT AND TEAM

TECHNOLOGY CAPEX (£m)



TECHNOLOGY TEAM



WHAT'S NEXT?



FUTURE CUSTOMER EXPERIENCES



Q&A

QUESTIONS?

GROWTH OPPORTUNITIES AND STRATEGY – NICK BEIGHTON

FINANCIAL PERSPECTIVES – HELEN ASHTON

TECHNOLOGY – CLIFF COHEN, BOB STRUDWICK, ANDREA TROCINO



COFFEE AND COMFORT BREAK

**SEE
YOU
BACK
AT
3:10PM!**



THE PRESENTING ASOS TEAM

EXECUTIVES



NICK BEIGHTON
CEO



HELEN ASHTON
CFO



CLIFF COHEN
CIO



BOB STRUDWICK
CTO



ANDREA TROCINO
Head of Mobile

ACQUISITION + ENGAGEMENT



ANDY BERKS
Director of
Perform. Marketing



EVE WILLIAMS
Brand Experience
Director



NICK LOVEDAY
Womenswear (WW)
Retail Director



STEFAN PESTICCIO
Menswear (MW)
Retail Director



VANESSA SPENCE
Womenswear
Design Director



JOHN MOONEY
MW Creative
Director & Production

TECHNOLOGY

MOBILE

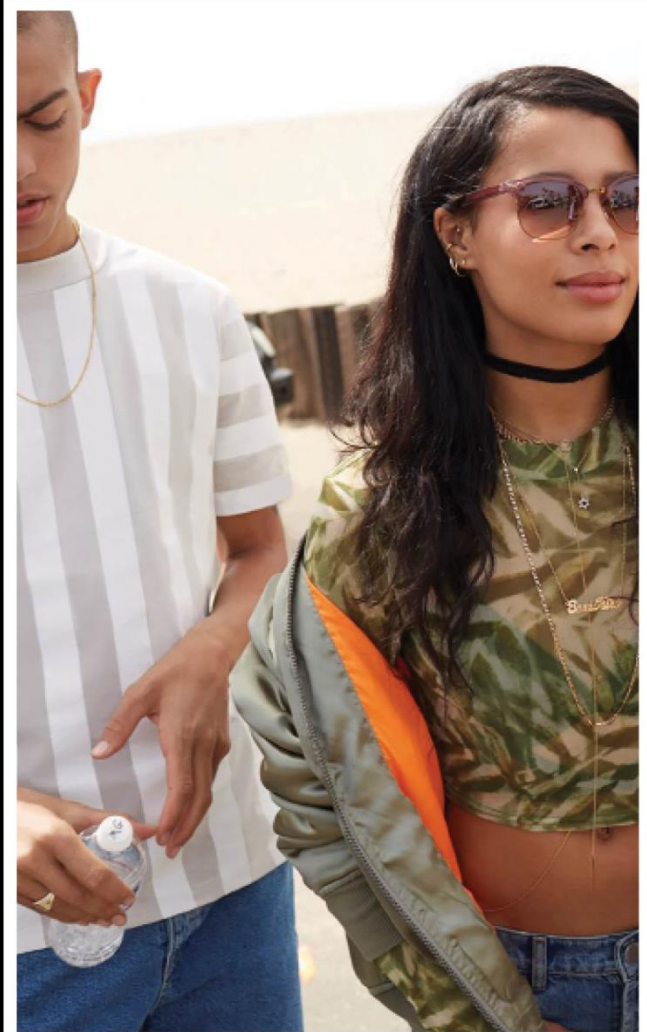
RETAIL

5

CUSTOMER ACQUISITION AND ENGAGEMENT

ANDY BERKS – DIRECTOR OF PERFORMANCE MARKETING
EVE WILLIAMS – BRAND EXPERIENCE DIRECTOR

asos





OUR TARGETED, CUSTOMER-CENTRIC STRATEGY LEADS US TO ACQUIRE & RETAIN VALUABLE, HIGH QUALITY CUSTOMERS

**SIGNIFICANT
OPPORTUNITIES**

**FINANCIAL
STRENGTH**

**UNDERSTAND
OUR CUSTOMERS**

DIGITAL CHANGED THE WORLD OF ADVERTISING

OLD WORLD – “MAD MEN” ADVERTISING



MESSAGE AMPLIFIED AT SCALE TO POTENTIAL CUSTOMERS

NEW WORLD – “MATH MEN” ADVERTISING

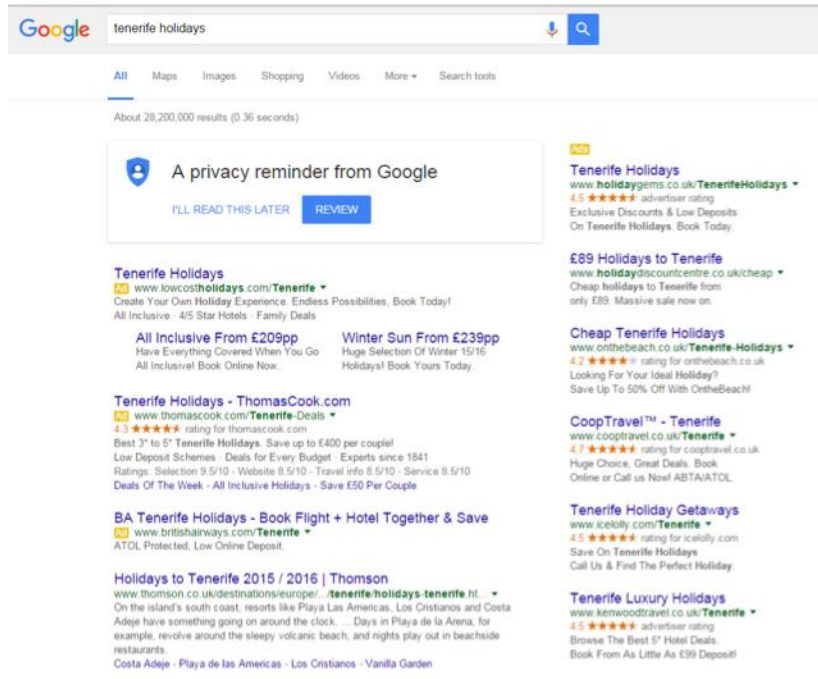


MESSAGE TARGETED AT SPECIFIC CUSTOMERS

WE FOCUS ON USING DIGITAL & HARNESSING ITS TRACKABILITY TO BE LASER FOCUSED ON WHEN, WHERE & TO WHOM WE SHOULD SPEND MARKETING MONEY

EVEN THE DIGITAL LANDSCAPE HAS CHANGED

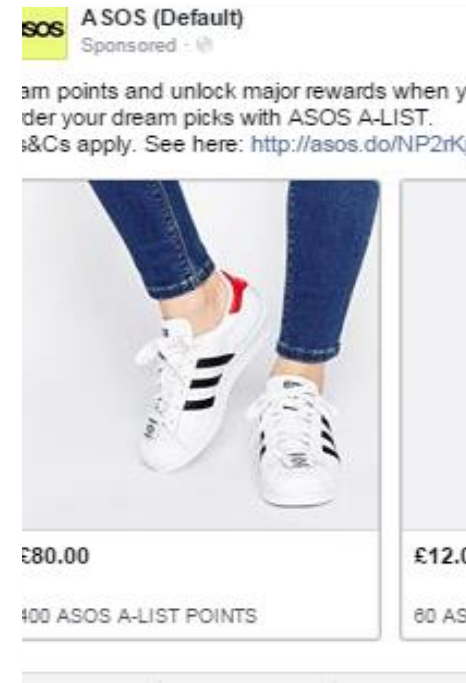
THEN



TARGETED BY KEYWORD / PUBLISHER / TERRITORY

CHANNELS AT THE CENTRE

NOW

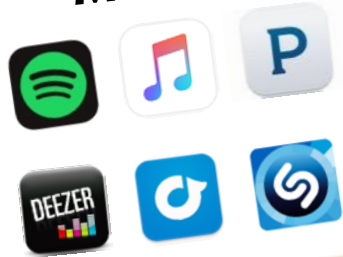


TARGETED BY DEVICE / LOCATION / CONTEXT

CUSTOMERS AT THE CENTRE

CUSTOMER BEHAVIOUR IS ALL ABOUT MOBILE

MUSIC



GAMES



CHAT



FITNESS



PHOTOS



SHOPPING



VIDEO



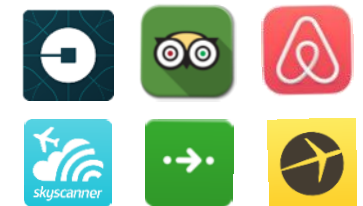
NEWS



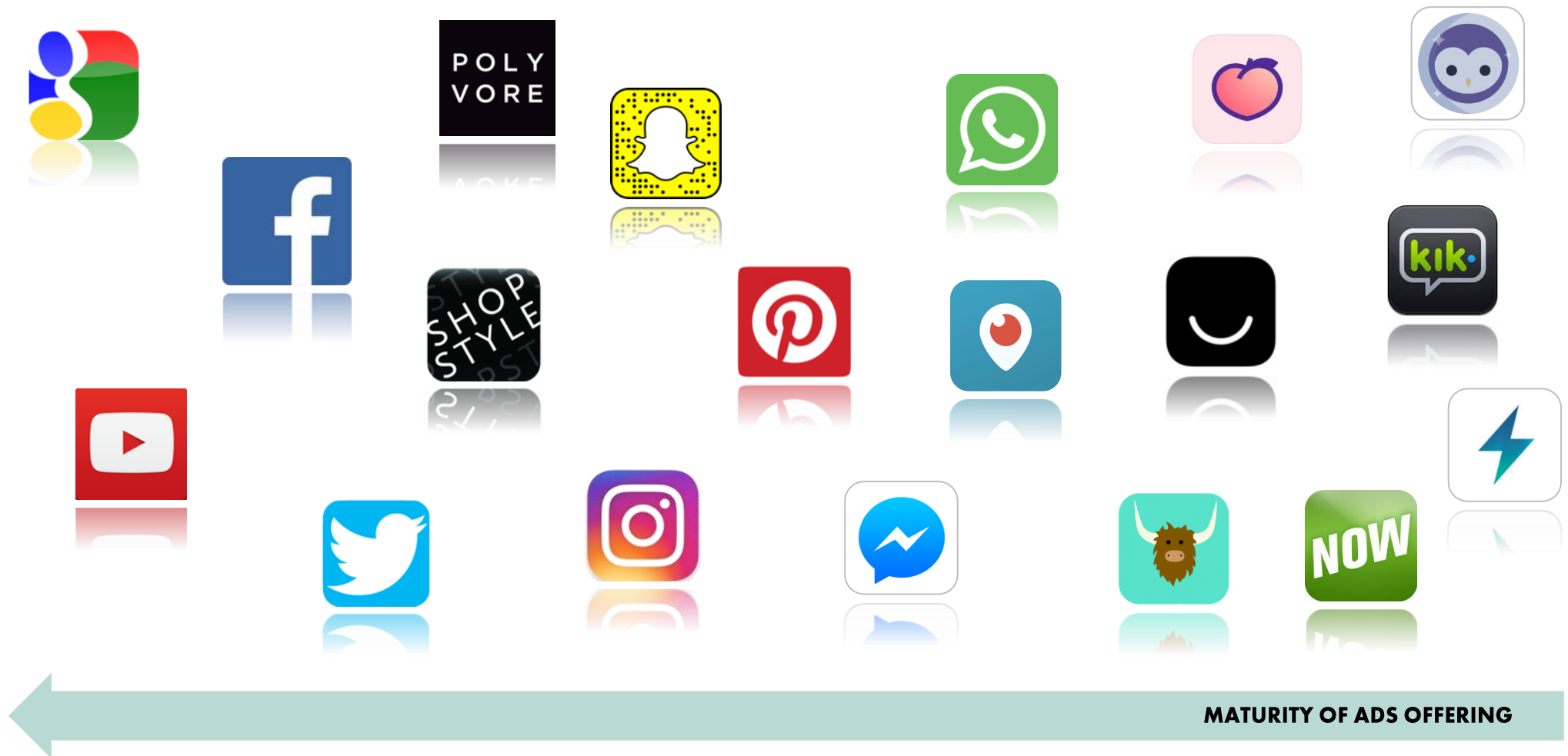
DATING



TRAVEL



MOBILE PLATFORMS AS ADVERTISING PLATFORMS



OUR MOBILE EXPERTISE MEANS WE ARE WELL PLACED TO CAPITALISE ON THIS FUTURE

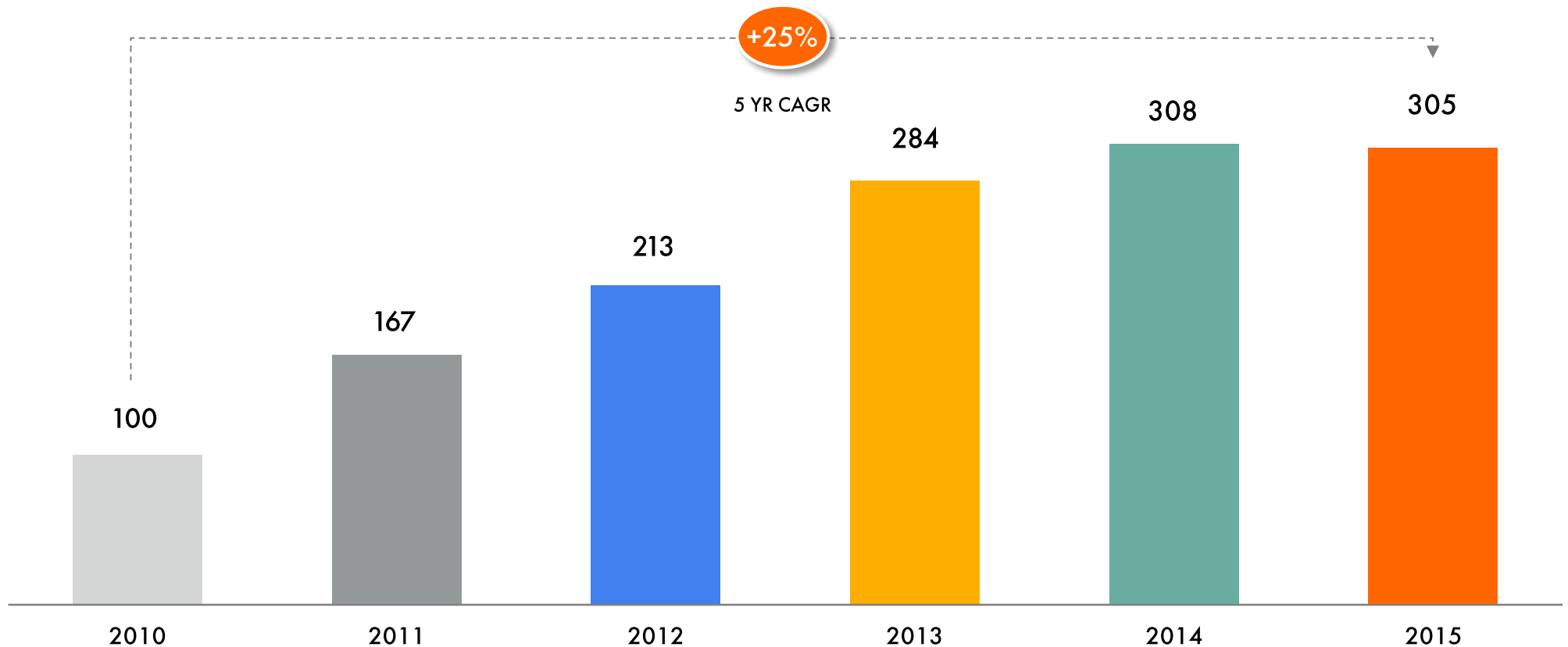


**WE INVEST SUSTAINABLY,
NOT GROWTH AT ALL COSTS**



STRONG GROWTH IN NEW CUSTOMER ACQUISITION

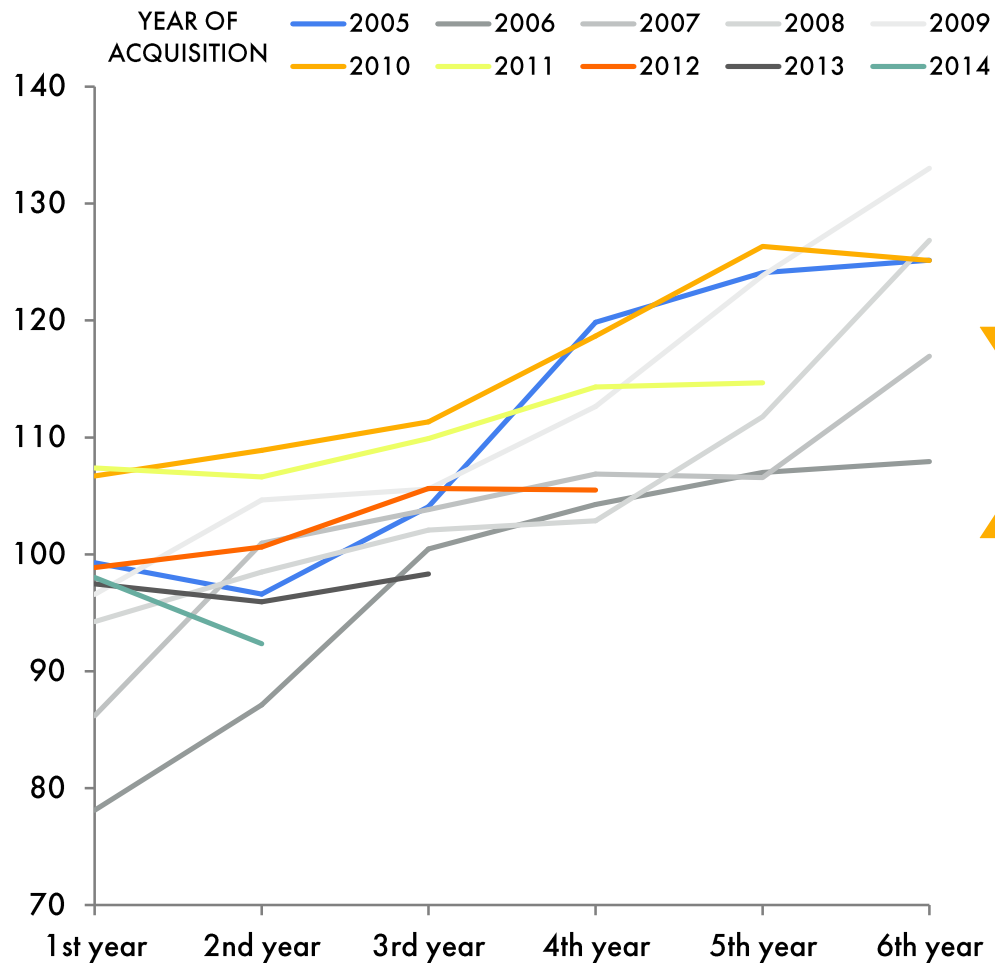
NEW CUSTOMER ACQUISITION OVER TIME (INDEXED)



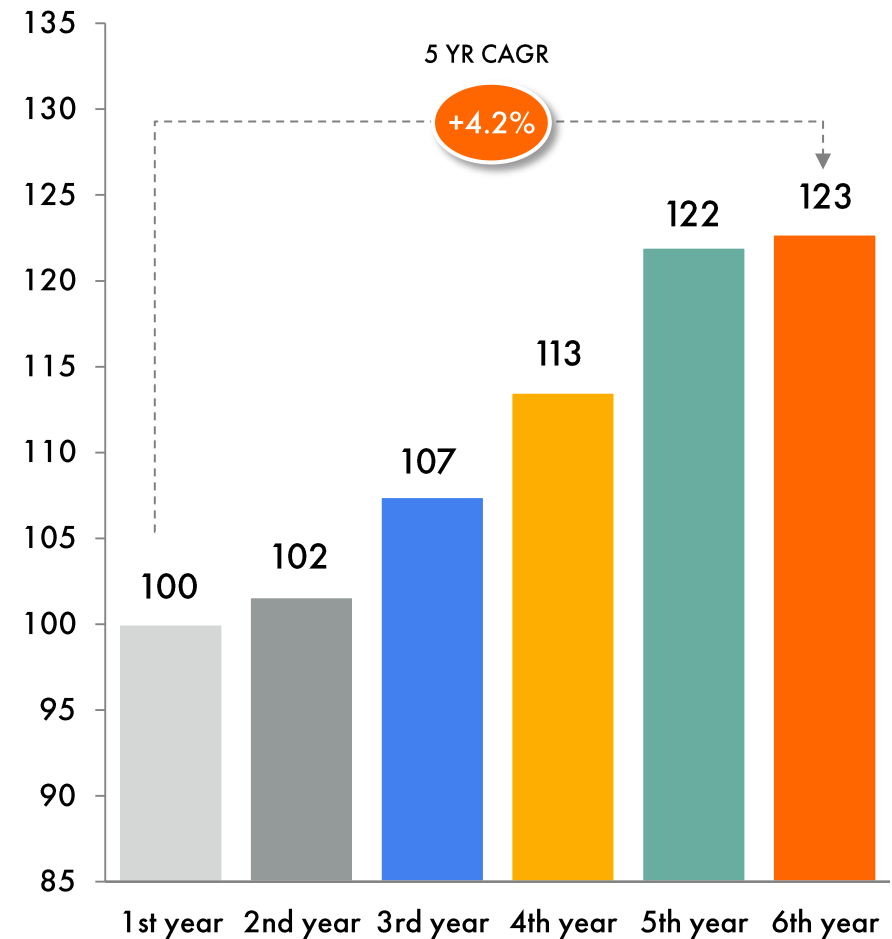
APPROXIMATELY **70%** OF NEW CUSTOMERS ACQUIRED ARE **UNDER 30 YEARS OF AGE**

NEW CUSTOMERS DEVELOP INTO GREAT CUSTOMERS

CUSTOMER VALUE OVER TIME (INDEXED)



AVERAGE WEIGHTED CUSTOMER VALUE (INDEXED)





CUSTOMER ENGAGEMENT

EVE WILLIAMS – BRAND EXPERIENCE DIRECTOR

ASOS



**WE UNDERSTAND OUR CUSTOMERS, AND WE KNOW
HOW TO REACH THEM BY PRODUCING GREAT CONTENT**

**SIGNIFICANT
OPPORTUNITIES**

**FINANCIAL
STRENGTH**

**UNDERSTAND
OUR CUSTOMERS**

TURNING SALES INTO LOYAL CUSTOMERS AND ADVOCATES



LIFE OF A 20-SOMETHING



SOCIAL MEDIA MATTERS TO 20-SOMETHINGS



100M
ACTIVE USERS (DAILY)

THE SNAPCHAT APP **REACHES 41% OF 18 TO 34-YEAR-OLDS** IN THE U.S.,
WHILE THE TOP 15 TV NETWORKS IN THE COUNTRY
REACH JUST 6% OF PEOPLE IN THE SAME AGE BRACKET

SNAPCHAT'S **100 MILLION DAILY ACTIVE USERS**
SPEND AN AVERAGE OF **25 TO 30 MINUTES PER DAY** ON THE APP

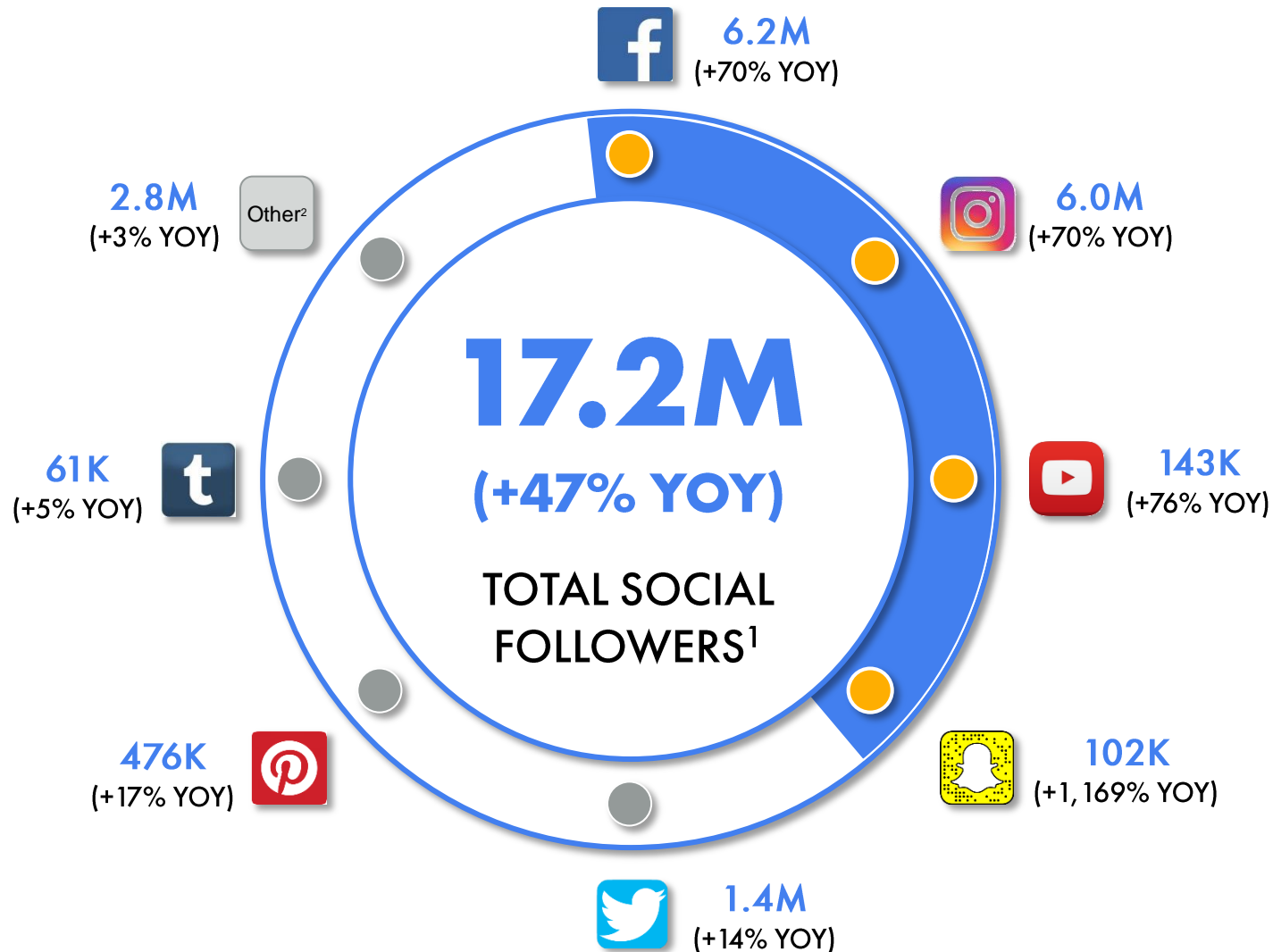


400M
ACTIVE USERS (MTHLY)

90% OF INSTAGRAM USERS ARE UNDER 35 AND
41% OF ALL INSTAGRAM USERS ARE BETWEEN 16 AND 24

THE AVERAGE INSTAGRAM USER SPENDS
21 MINUTES PER DAY ON THE APP






GROWING FOLLOWERS ACROSS ASOS SOCIAL MEDIA PLATFORMS



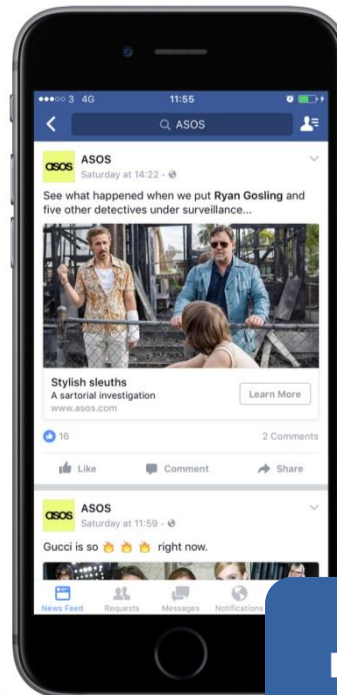
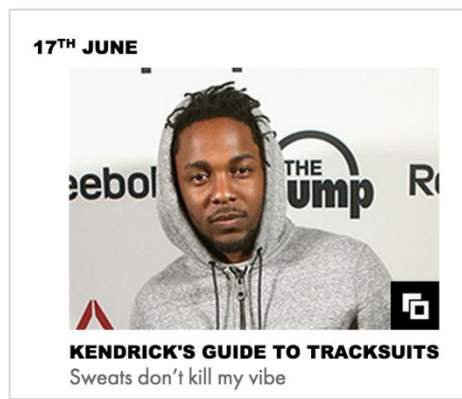
Source: Facebook Analytics, Twitter Analytics, Sprinklr, ASOS own records

Note: ¹ ASOS brand accounts only. ² Other social media platforms include VK, WeChat, Weibo, Spotify. Highlighted platforms represent the most important social media platforms

WE GATHER INFORMATION AND DATA ABOUT OUR CUSTOMERS FROM A WIDE VARIETY OF SOURCES

					
Description	Brand tracking	Customer loyalty	Audience insight and trends	User testing	Ethnographic studies
Method	Survey	Survey	Focus groups and surveys	Focus groups	Interviews
No. of people we speak to annually	13.8K	720K 120K Desktop, 600K Mobile	3k	216	120 Fashion forward adopters
Frequency of contact	Quarterly	Monthly	Quarterly	Monthly	Ongoing
Number of geographies	5	11	3	1 (10 nationalities)	3 (10 cities)

UNDERSTANDING THE ROLE CONTENT CAN PLAY IN OUR AUDIENCES' LIVES



UNDERSTANDING THE ROLE CONTENT CAN PLAY IN OUR AUDIENCES' LIVES

asos
discover fashion online

PRODUCES

60,000+

PIECES OF CONTENT EACH MONTH

- ~60,300 POSTS ON SOCIAL CHANNELS
- ~140 ARTICLES ON ASOS LIKES
- ~30 VIDEOS ON YOUTUBE
- ~615 ARTICLES ON SITE
- ~70 FEATURES ON ASSEENONME

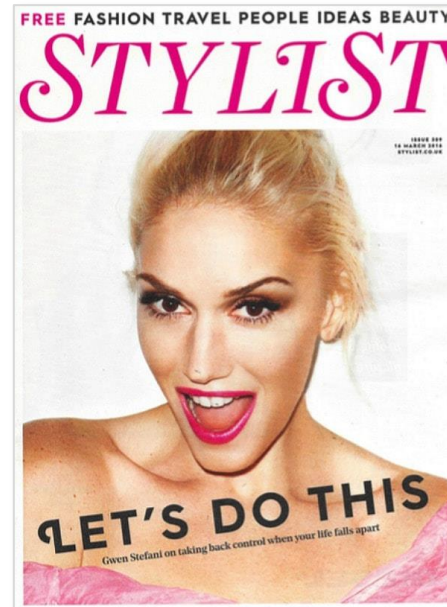
GAINING REACH THROUGH NON-DIGITAL CHANNELS TOO



454,797



405,308



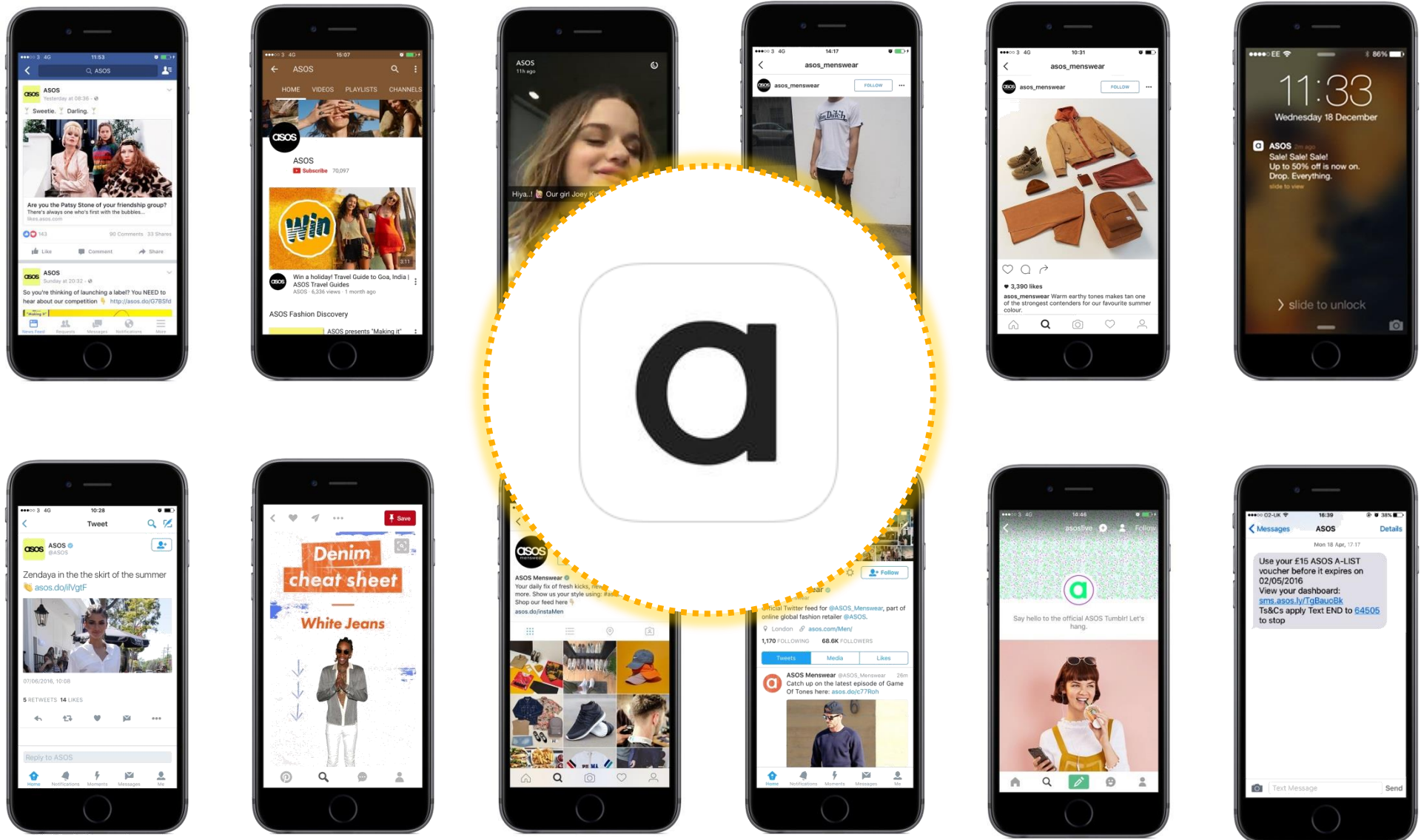
404,014



350,031

THE ASOS MAGAZINE HAS THE **HIGHEST CIRCULATION** OF ANY FASHION MAGAZINE IN THE UK

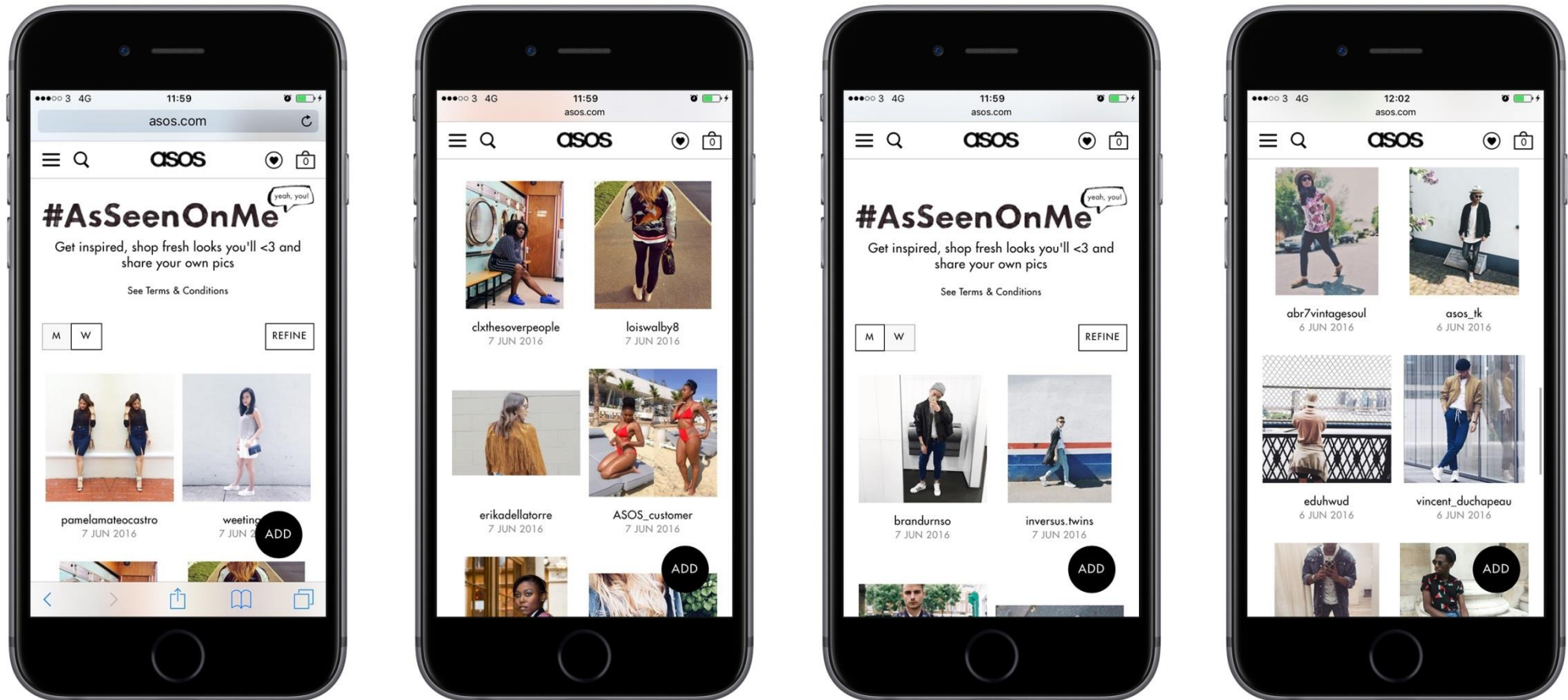
PRESENCE ACROSS ALL PLATFORMS, NOT JUST A SINGLE APP



THE MOST IMPORTANT SOURCE OF INFORMATION ABOUT OUR CUSTOMERS IS OUR PEOPLE



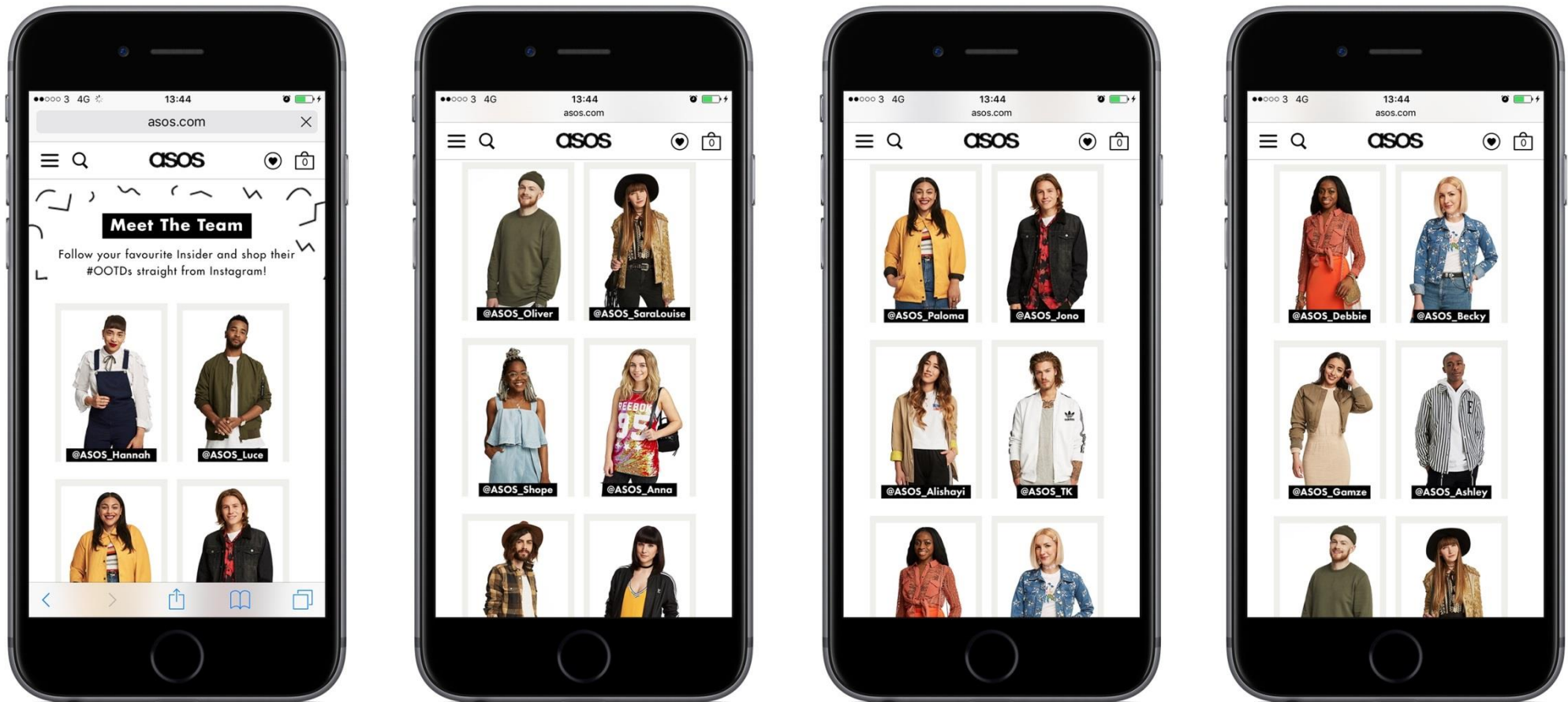
ASSEENONME



CUSTOMERS WHO ENGAGE WITH **ASSEENONME**,
SHOP 7 TIMES MORE FREQUENTLY THAN THE AVERAGE ASOS CUSTOMER

ASOS INSIDERS

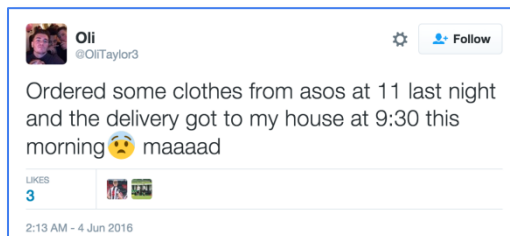
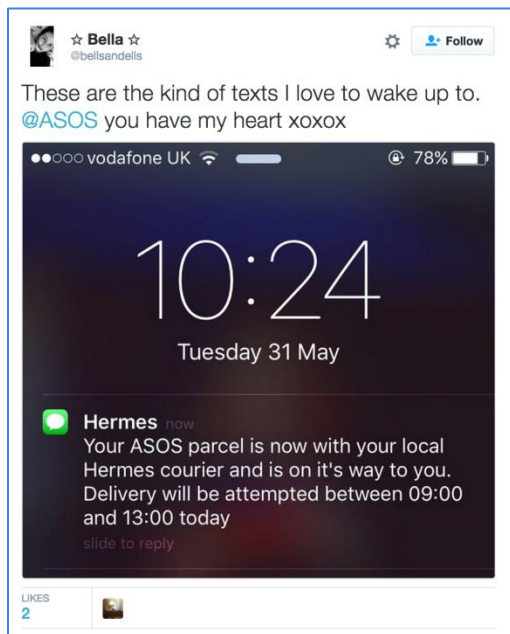
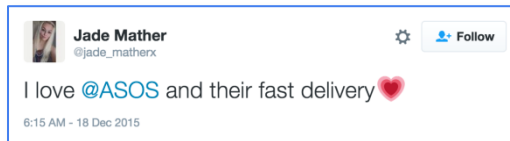
WE RECEIVE **DOUBLE THE ENGAGEMENT RATE** ON SOCIAL FOR OUR INSIDER CONTENT,
THAN WE DO FOR OUR BRANDED CHANNELS



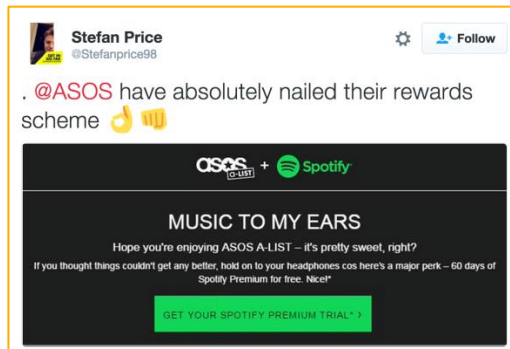
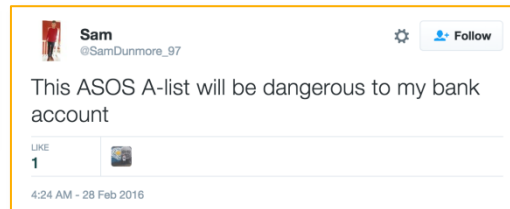
CUSTOMERS WHO ENGAGE WITH **ASOS INSIDERS**,
SHOP **6** TIMES MORE FREQUENTLY THAN THE AVERAGE ASOS CUSTOMER

CREATING ADVOCATES WHO PROMOTE THE ASOS EXPERIENCE

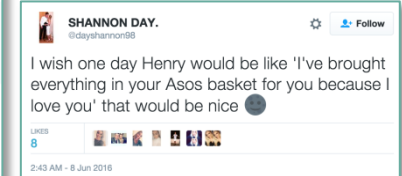
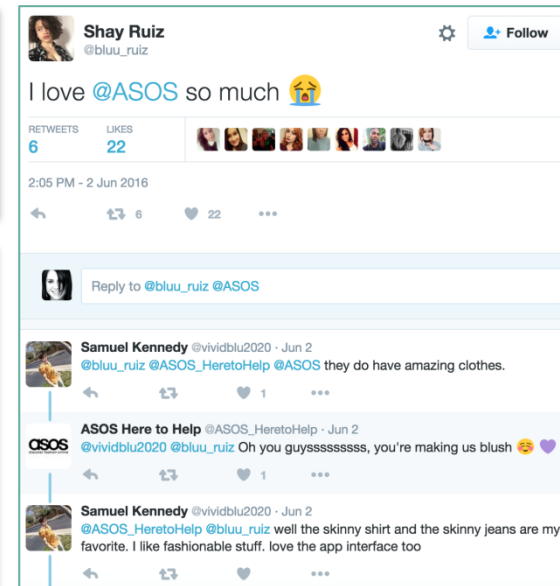
DELIVERY SERVICE



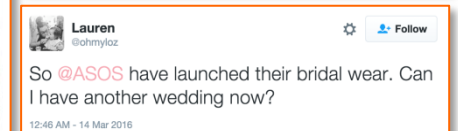
A-LIST & REWARDS



GENERAL LOVE FOR ASOS



NEW CATEGORY



HOW ASOS IS WOVEN INTO THE LIFE OF A CUSTOMER



6

RETAIL, DESIGN AND PRODUCTION

NICK LOVEDAY – WOMENSWEAR (WW) RETAIL DIRECTOR
STEFAN PESTICCIO – MENSWEAR (MW) RETAIL DIRECTOR
VANESSA SPENCE – WOMENWEAR DESIGN DIRECTOR
JOHN MOONEY – MW CREATIVE DIRECTOR & PRODUCTION

asos



WHY WE ARE DIFFERENT FROM OTHER RETAILERS...

- WE ARE CUSTOMER OBSESSED
- WE PROVIDE A UNIQUE PRODUCT OFFER

**"TO BE THE WORLD'S NUMBER 1
FASHION DESTINATION
FOR 20 SOMETHINGS"**



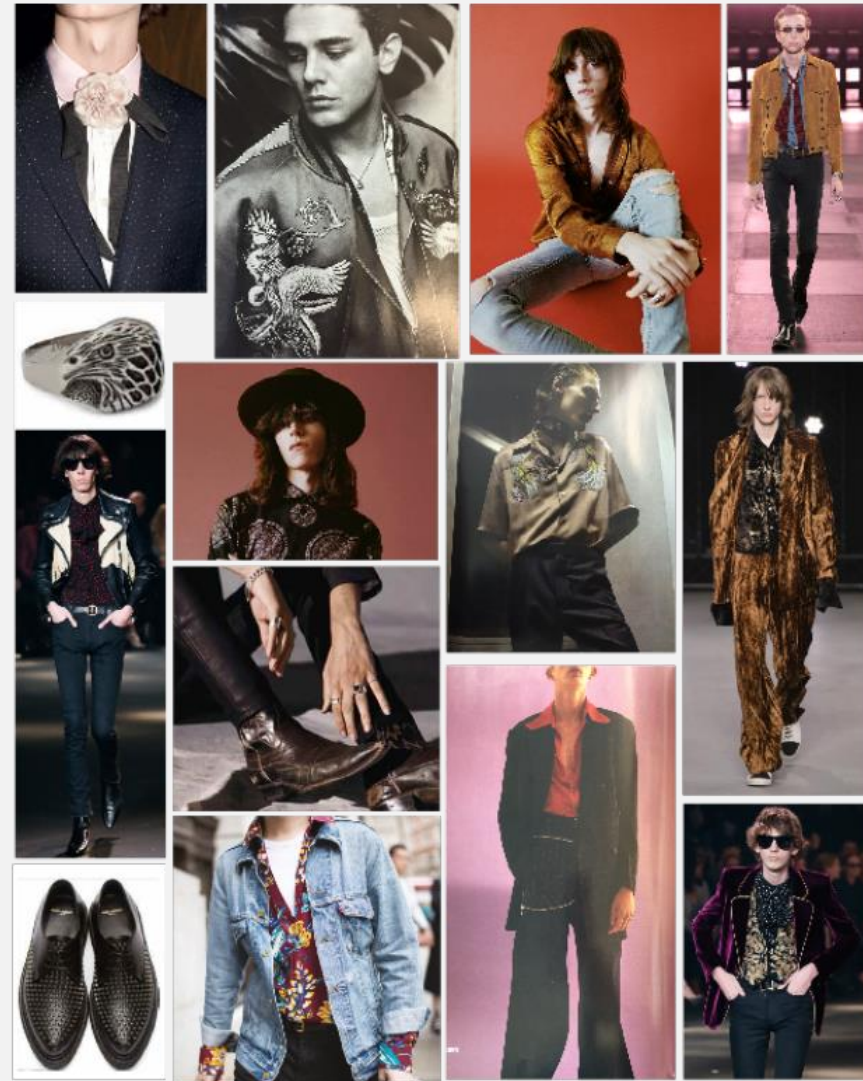
'20 SOMETHING' FOCUSSED



SEGMENTS, GROUPS, FRIENDSHIPS, UNISEX



GRUNGE GUY



GRUNGE GIRL



GRUNGE

MENSWEAR

BASIC



ADVENTUROUS



WOMENSWEAR

BASIC



ADVENTUROUS



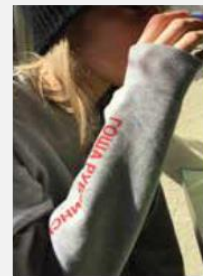
SKATE GIRL



FKA Twigs



SKATE GUY



SKATE

MENSWEAR

BASIC

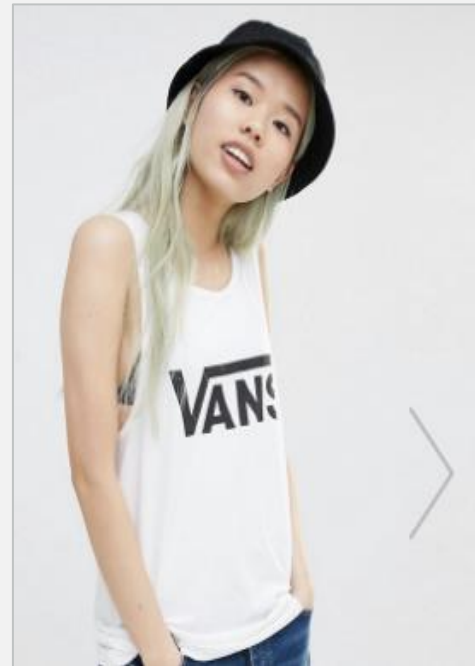


ADVENTUROUS

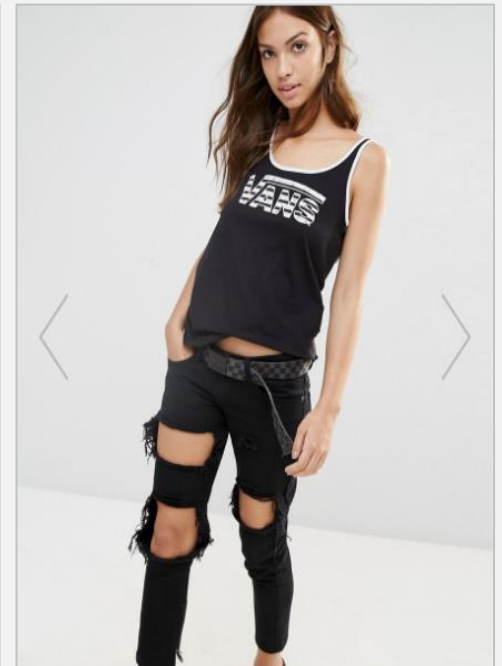


WOMENSWEAR

BASIC



ADVENTUROUS



HOLIDAY



FESTIVALS



HALLOWEEN



EXTENDED SIZING



CURVE



TALL



TALL



PLUS



MATERNITY



PETITE



UNIQUE PRODUCT OFFER

ASOS BRAND + THE BEST EDIT OF BRANDS

TO BE THE WORLD'S NUMBER 1
FASHION DESTINATION FOR
20 SOMETHINGS



ASOS BRAND



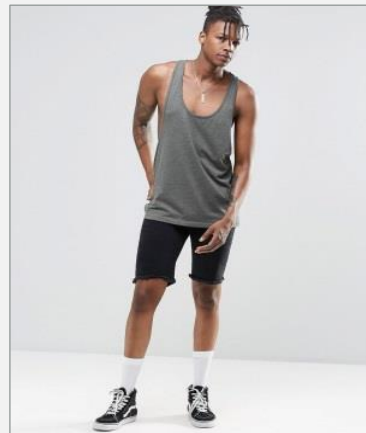
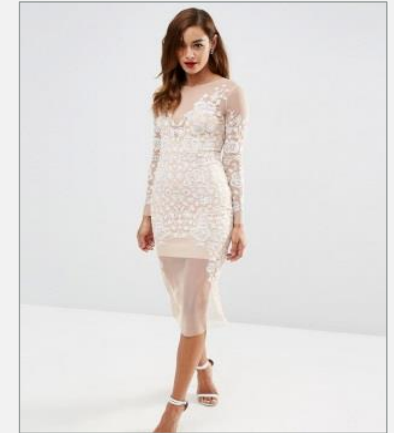
“THE JEWEL IN THE CROWN”

BRAVERY IS IN OUR BLOOD

WE ARE CREATIVE & AUTHENTIC
TO OUR CORE

FASHION THRIVES ON INDIVIDUALITY
& SHOULD BE FUN FOR EVERYONE

TOGETHER WE GROW FRESH TALENT &
KEEP FASHION MOVING FORWARD



ASOS BRAND

- BEST PRICE
- GREAT QUALITY
- FIRST WITH TRENDS
- REACTIVE TO CUSTOMER DEMANDS
- SPEED TO MARKET
- WIDTH OF OFFER
- DESIGNED FOR EVERY 20 SOMETHING
CUSTOMER



BRANDS @ ASOS

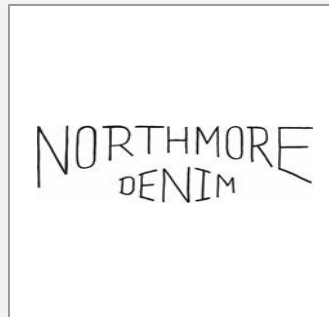


- THE BEST EDIT OF GLOBAL BRANDS FOR THE 20 SOMETHING CUSTOMER
- WE EDIT WHAT BRANDS WE STOCK ON SITE
- WE EDIT THE BRANDS COLLECTIONS SO THE CUSTOMER DOESN'T HAVE TO
- ONLY THE VERY BEST MAKE THE FINAL CUT
- EVERY YEAR THE EDIT IS DIFFERENT
- LAST YEAR: 300 NEW & 300 EXITED



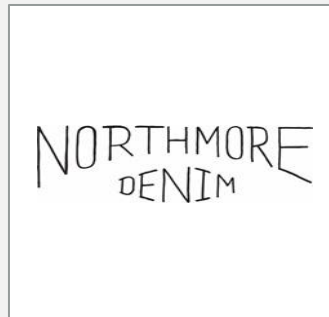
EXCLUSIVE COLLECTIONS & STYLES

- WORK WITH EXISTING BRANDS
- OFFERS A POINT OF DIFFERENCE
- COVERS AN IDENTIFIED GAP IN THE RANGE
- HEAVILY INFLUENCED BY ASOS BUYING TEAMS
- GLOBALLY EXCLUSIVE TO ASOS



EXCLUSIVE COLLECTIONS & STYLES

- THE NEWEST BRANDS YOU HAVE YET TO HEAR ABOUT
- SPOTTED ON INTERNET, SOCIAL AND BUYING TRIPS
- RECOMMENDED BY STAFF, FRIENDS AND CUSTOMERS
- WE UNCOVER THE VERY BEST BRANDS PEOPLE DON'T YET KNOW EXIST!



PRODUCT AREAS WE OWN

DENIM



T-SHIRTS



FOOTWEAR



PRODUCT AREAS WE OWN

DRESSES



SPECIALIST



FOOTWEAR



NEW EMERGING OPPORTUNITIES



SUMMARY

“THE GREATEST POSSIBLE
CHOICE OF
RELEVANT FASHION,
AT THE BEST PRICE,
WHATEVER YOUR SHAPE
OR SIZE”



FASHION WITH INTEGRITY



ASOS ETHICAL TRADE AND SUSTAINABILITY

- 503 factories across 29 countries, employing 88,574 workers: 100% factories audited yearly
- Ethical Trading Initiative (ETI) member since 2009: active participation in working groups
- Action, Collaboration, Transformation: a collaborative process with 17 brands and IndustriALL towards Living Wages for workers in global textile and garment supply chains
- Focus on principles to support responsible recruitment of labour in supply chains including migrant and contract workers
- Mix of Better Cotton (BCI) in our product has increased and is reaching 'business as usual' scale for ASOS
- Managing chemical risk in the supply chain has moved on from applying the fundamentals of REACH legislation to anticipating global trends in this area and tackling them before they cause a problem for us



PROACTIVE AND FLEXIBLE APPROACH





DESIGN

VANESSA SPENCE – WOMENSWEAR DESIGN DIRECTOR

THE POWER OF THE ASOS DESIGN TEAM

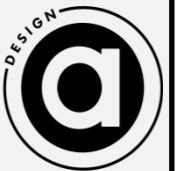
61 STRONG DESIGN TEAM

51,000 STYLES PER YEAR

112 INSPIRATION TRIPS

359 DEVELOPMENT TRIPS

DESIGN INFLUENCES EVERY SINGLE STYLE

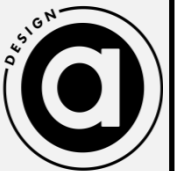


SS16 TREND

SUMMER TALES



MCQUEEN EXHIBITION – SAVAGE BEAUTY



SPEED TO MARKET

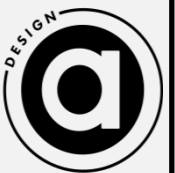


638k UNITS

SOCIAL MEDIA

STREET STYLE

SKETCH TO SITE IN 6 WEEKS

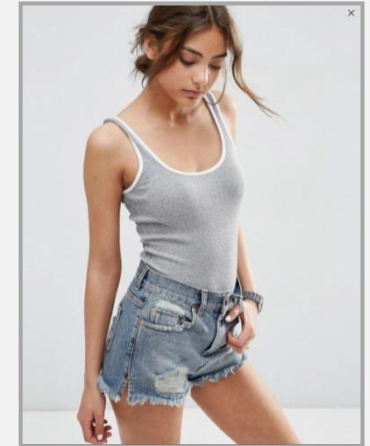
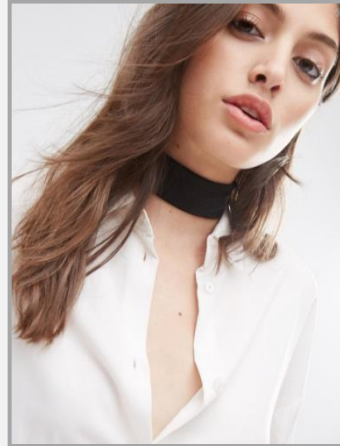


'BIG DEALS'

CHOKERS 430k UNITS

OFF SHOULDER 1.9m UNITS

BODIES 2.6m UNITS



SUPER SKINNY SUITS 98k UNITS

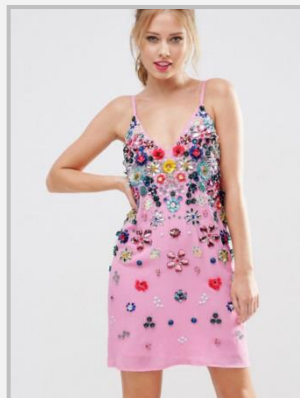
BOMBERS 322k UNITS

LONG LINE TEE 1.5m UNITS



CREATIVITY & TALENT

CREATIVE DESIGN TEAM
PATTERN ROOM



GRADUATE FASHION WEEK
PROTÉGÉ SCHEMES
INTERNS



SEGMENTS

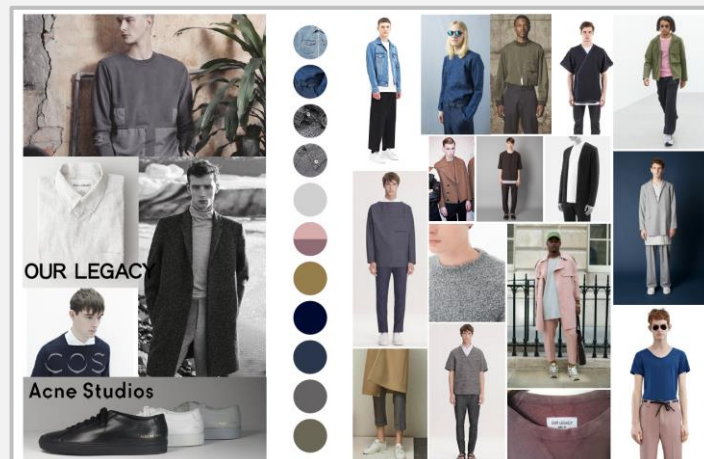
GRUNGE GIRL



RETRO GIRL



SCANDI GUY



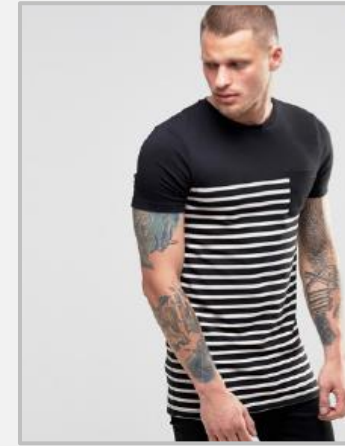
CREATIVE OPPORTUNITIES

POOL PARTY



416k UNITS

MUSCLE FIT



1.8m UNITS

WEDDING



1.4m UNITS





'THE POWER OF THE ASOS DESIGN TEAM'



PRODUCTION

JOHN MOONEY – MW CREATIVE DIRECTOR & PRODUCTION

asos

ASOS STUDIOS

13 STUDIOS

7 STILL BAYS

360 SPINSETS

26 MODELS PER DAY

4,000 PRODUCTS PER WEEK

165,000 SHOTS TAKEN & EDITED

18,000 IMAGES UPLOADED WEEKLY



MODELS & SEGMENTS



+185% POST RE-SHOOT



MODELS & SEGMENTS



+740% POST RE-SHOOT



THE NEW PROPOSITION: WOMENSWEAR



THE NEW PROPOSITION: MENSWEAR



ASOS CATWALK



ASOS STUDIOS: THE VISION

SHIFT TO AN EDITORIAL AESTHETIC
CONTINUE TO ENHANCE & ENRICH
A PROPOSITION BETTER THAN FEELING

AGILE YET CONSIDERED

AND WHY...?

BECAUSE 'ASOS STUDIOS' DRIVES SALES...!



Q&A

QUESTIONS?

ENGAGING CONTENT AND EXPERIENCES – ANDY BERKS, EVE WILLIAMS

RETAIL – NICK LOVEDAY, STEFAN PESTICCIO

DESIGN – VANESSA SPENCE

PRODUCTION – JOHN MOONEY

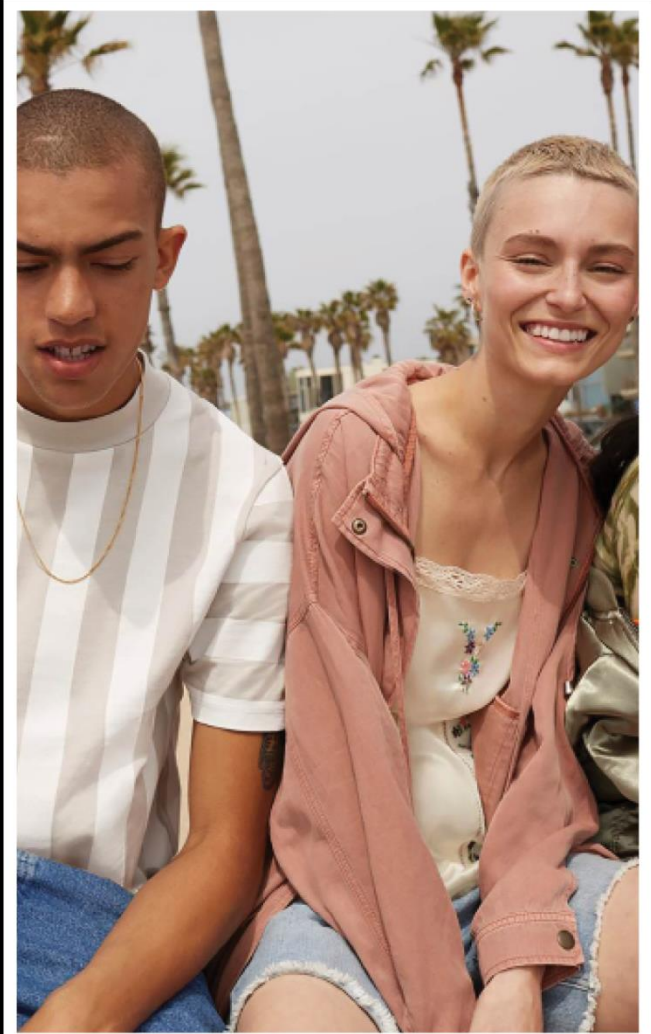


7

CONCLUDING REMARKS

NICK BEIGHTON – CEO

asos



ASOS FASHION CATWALK

asos
discover fashion online

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