

Fashion Online - UK - June 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“As consumers have become more accustomed to shopping for fashion online their expectations have been raised and retailers will have to invest more in the online shopping experience to drive sales. Delivery is becoming a key online battleground and the use of delivery passes and more dynamic delivery options could increase loyalty towards a specific retailer.”

Tamara Sender, Senior Fashion Analyst

This report looks at the following areas:

- Why is online fashion continuing to see strong growth?
- Who are the winners and losers in online fashion?
- What are the growth opportunities for online sales of fashion?

Products covered in this Report

For the purposes of this Report, Mintel has used the following definitions for online fashion:

Includes:

- Clothing for men, women and children, including both underwear and outerwear.
- Footwear, including shoes, boots and any other type.
- Fashion accessories such as handbags, scarves and costume jewellery.

The market is defined as all purchases where transactions are made through the retailer's website, or through an auction site, rather than by other ordering methods, even if the product is viewed online prior to purchase.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Fashion Online - UK - June 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
Products covered in this Report

Executive Summary

The market

Online fashion sales to grow 17.2% in 2017

Figure 1: Best- and worst-case forecast of online sales of clothing, accessories and footwear, 2012-22

Social media usage

Companies and brands

Pureplays grow their share

Innovations

Young fashion pureplays seen as trendsetting

Figure 2: Attitudes towards and usage of selected brands, August 2016-May 2017

Amazon is leading online fashion adspend

Figure 3: Total above-the-line, online display and direct mail advertising expenditure on online fashion, 2014-17

The consumer

Millennials buy most fashion online

Figure 4: Types of online fashion buyers, April 2017

48% of Millennials use smartphones for fashion

Figure 5: Types of devices used to buy fashion online, April 2017

Young women favour multichannel but shopping more at pureplays

Figure 6: Types of retailers from which consumers have bought fashion online in the last 12 months, April 2017

Amazon most popular pureplay for fashion

Figure 7: Online-only retailers from which consumers have bought fashion in the last 12 months, April 2017

Retailers need to prioritise customer service and returns

Figure 8: Satisfaction with shopping for fashion online, by different factors, April 2017

50% return items bought online

Figure 9: Online fashion shopping behaviour, April 2017

Improving deliveries to drive male purchasing

Figure 10: Interest in innovations when shopping online for fashion, April 2017

What we think

Issues and Insights

Why is online fashion continuing to see strong growth?

The facts

The implications

Who are the winners and losers in online fashion?

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Fashion Online - UK - June 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The facts

The implications

What are the growth opportunities for online sales of fashion?

The facts

The implications

The Market – What You Need to Know

Online fashion sales to grow 17.2% in 2017

Online fashion to remain strong but will slow

Online fashion accounts for 24% of total sales

Smartphone ownership remains steady

Social media usage

Leisure prioritised in spending

Ageing population

Market Size and Forecast

Online fashion sales to grow 17.2% in 2017

Figure 11: Best- and worst-case forecast of online sales of clothing, accessories and footwear, 2012-22

Online fashion to remain strong but will slow

Figure 12: Online sales of clothing, accessories and footwear, 2012-22

Online fashion accounts for 24% of total sales

Figure 13: Online sales of clothing and footwear as a % of total clothing and footwear sales, 2013-17

Forecast methodology

Market Drivers

Smartphone and tablet ownership remains steady

Figure 14: Personal ownership of consumer technology products, December 2016

12% plan to buy smartwatches

56% like brands on social media

Figure 15: Brand/product-related online activities performed in the past three months, December 2016

Social media usage

Figure 16: Social and media networks used, March 2017

Consumer confidence

Figure 17: How respondents would describe their financial situation, by gender, April 2017

Leisure prioritised in spending

Figure 18: What extra money is spent on, by gender, April 2017

Population trends

Companies and Brands – What You Need to Know

Pureplays grow their share

Next loses share of online

Young fashion e-tailers diversify

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Fashion Online - UK - June 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Luxury online players see rising revenues
 Voice-enabled devices
 Amazon is leading online fashion adspend
 Young fashion pureplays seen as trendsetting

Market Share

Pureplays grow their share
 Figure 19: Estimated market shares of online sales of clothing and footwear, 2014-16
 Multichannel

Competitive Strategies

Young fashion retailers
 Mid-market pureplays
 Luxury pureplays
 Up-and-coming brands

Launch Activity and Innovation

Messaging apps
 Figure 20: WhatsApp-style conversational user interface with the very.co.uk mobile app, November 2016
 Social media
 Figure 21: Screenshot of Mr Porter's shoppable Apple TV app, September 2016
 More delivery options
 Virtual realities
 Voice-enabled devices
 Personalisation
 Pureplays move into physical retailing
 New launches
 Figure 22: Screenshot of Celine's Instagram account, March 2017

Advertising and Marketing Activity

Online fashion retailers cut back on adspend
 Figure 23: Total above-the-line, online display and direct mail advertising expenditure on online fashion, 2014-17
 Amazon is leading online fashion adspend
 Boohoo first dedicated menswear campaign
 Pretty Little Thing launches YouTube campaign
 Very.co.uk's £3 million autumn fashion collection campaign
 Figure 24: Leading UK online fashion retailers: recorded above-the-line, online display and direct mail total advertising expenditure, 2014-17
 Digital overtakes press ads
 Figure 25: UK online fashion retail: recorded above-the-line, online display and direct mail total advertising expenditure, by media type, 2014-16
 Nielsen Ad Intel coverage

Brand Research

Brand map

BUY THIS
 REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Fashion Online - UK - June 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 26: Attitudes towards and usage of selected brands, August 2016-May 2017

Key brand metrics

Figure 27: Key metrics for selected brands, August 2016-May 2017

Brand attitudes: ASOS seen as innovative

Figure 28: Attitudes, by brand, August 2016-May 2017

Brand personality: Boohoo is a fun brand

Figure 29: Brand personality – Macro image, August 2016-May 2017

Littlewoods seen as disappointing

Figure 30: Brand personality – Micro image, August 2016-May 2017

Brand analysis

Online-only giants

Young fashion pureplays

Mid-market pureplays

The Consumer – What You Need to Know

Millennials buy most fashion online

Online fashion usage

48% of Millennials use smartphones for fashion

Young women shop more at young fashion pureplays

Retailers need to prioritise customer service and returns

50% return items bought online

Young men most influenced by social media blogs

Improving deliveries to drive male purchasing

Parents of young kids drawn to virtual reality

Online Fashion Purchasing

Millennials buy most fashion online

Figure 31: People who answered yes to having bought any fashion items online in the last 12 months, by gender and age, April 2017

Online fashion usage

Figure 32: Types of online fashion buyers, April 2017

25% of young men buy all fashion online

Figure 33: Types of online fashion buyers, by gender and age, April 2017

Devices Used to Buy Fashion Online

48% of Millennials use smartphones for fashion

Figure 34: Types of devices used to buy fashion online, April 2017

Figure 35: Types of online fashion buyers, by types of devices used to buy fashion online, April 2017

Where People Buy Fashion Online

Young multichannel fashion retailers no longer first port of call

Figure 36: Types of retailers from which consumers have bought fashion online in the last 12 months, April 2017

Department stores focus on online

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Fashion Online - UK - June 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Amazon most popular pureplay for fashion

Figure 37: Online-only retailers from which consumers have bought fashion in the last 12 months, April 2017

Young women shop at young fashion pureplays

Men aged 25-44 shop more at pureplays

Majority shop online at few retailers

Figure 38: Repertoire of types of retailers from which consumers have bought fashion online in the last 12 months, April 2017

Satisfaction with Shopping for Fashion Online

Dissatisfaction with fit of clothes

Figure 39: Satisfaction with shopping for fashion online, by different factors, April 2017

Retailers need to prioritise customer service and returns

Promote deliveries and payment process

Figure 40: Key drivers of overall satisfaction with online fashion purchases, April 2017

Figure 41: Correlation (R) values with overall satisfaction key driver output, April 2017

Methodology

Online Fashion Shopping Behaviour

50% return items bought online

Figure 42: Online fashion shopping behaviour, April 2017

Use of credit

Young men most influenced by social media blogs

33% like fashion brands on social media

Figure 43: Fashion online – CHAID – Tree output, April 2017

Methodology

Interest in Innovations

Improving deliveries to drive male purchasing

Figure 44: Interest in innovations when shopping online for fashion, April 2017

Interest in chatbots

Parents of young kids drawn to virtual reality

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Key driver analysis

Interpretation of results

Figure 45: Correlation (R) values with overall satisfaction – Key driver output, April 2017

Figure 46: Satisfaction with online fashion purchase factors, April 2017

Appendix – Market Size and Forecast

Forecast methodology

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com