August 2015

NEW REPORT

Online Fashion Europe 2015

France - Germany - Spain - UK

ResearchFARM

This project provides you with a robust overview of the development of the online fashion markets and major operators in France, Germany, Spain and the UK, giving you an assessment of both national and international models and the market.

A section on the general market background including:

a. Ecommerce market size, growth & forecasts

b. Ecommerce model preference (marketplaces, pureplays, multichannel),

c. Ecommerce fashion size growth & forecasts

d. Smartphone penetration,

e. M-commerce market size, growth & forecasts

f. Payment preferences

g. Fraud rate

h. Returns rate

i. General Market trends/customer trends

A section on the macro background, including:

a. Data on native language

b. % of English speakers

c. Ex-pat size

Competitor analysis Top 10

a. Operating model

b. Financials (sales/profit/margin)

c. Product segments

d. Historic and predicted growth projections

e. Description of customer proposition

f. Recent developments, strategies

FEATURES AND BENEFITS

FEATURES

- From the above, we have carried out a strategic analysis of the key success factors that a prospective operator would need to have to deliver a successful and profitable online fashion proposition.
- We provide colour and background on the development in the market, in clothing and footwear, how mail order has fared in its transition to online, what the department stores are up to, how big fast fashion is and where the supermarkets are in non food and clothing.
- Moreover Amazon best sellers are provided, highlighting the differences between various markets and giving insights into one of the fastest growing players in the category.

BENEFITS

- Benchmark your performance against the best in class
- Identify white space in a cross country comparison
- Understand Amazon's role in the clothing sector
- Receive sales figures for the category as a whole
- Establish the size of the prize (category) and dynamics within subcategories
- Gain insight into new trends, NPDs
- Find out which products, pack sizes, colours, styles work on Amazon
- Receive our Amazon forecasts and incorporate them into your in house planning

Methodology:

A number of different sources were used to understand the various propositions:

- Retailers and marketplace operators, accounts, trading updates and annual reports
- Data from official sources and the trade press
- Our own existing analysis on the various retailers
- Insights based on one to one conversations with our clients
- The data was cross-checked by a team of analysts and consultants.

Our new Amazon Annual Best seller reports are available on a consultancy basis and deeply mine our own Amazon Trackers research and employ some unique in house modeling techniques. Harnessing insights from a variety of data inputs, the model enables us to estimate annual volume data per product/ brand and as a second step the annual revenues per Best Seller.

For this, we use a combination of top down and bottom up approaches, involving consumer research, competitor intelligence and the data generated by our Amazon Tracker. We then apply a distribution curve, derived from actual volume data to the category in question to isolate the sales figures of the best performing products and brands.

Key questions

Key questions:

- What makes Fruit Of The Loom successful on Amazon?
- How many jeans does Levi's sell on Amazon?
- What are Nike's best sellers products on Amazon?
- What is the e-commerce and online clothing sizes for the countries covered?
- What are the most popular e-commerce models used by the leading players?
- How do the countries compare in terms of m-commerce?
- How do the shoppers from each country differ in their payment preferences?
- What are the fraud and returns rate for each country and how should retailers strategise accordingly?
- Which companies represent the top ten for the respective markets? What variety of business models feature?

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«Research Farm publishes great reports every year, and each report brings a unique perspective compared to any other information available elsewhere: the analyses go deep, they are supported with data, but what I most value is that each report is built around a 'clear story', contains proprietary insights and even sometimes innovative projections into the future which help us to think out of the box.»
Global Channel Category sales
Nestle waters

«For us the ResearchFarm reports are so useful. The information provided give us the opportunity to increase our knowledge about the retail industry and its key trends.»
Rafael Florez - CEO GS1 Columbia

«The discounters reports were and still are very helpful as we got lots of detailed information and figures we haven't found anywhere else. This has helped us to progress with our plans of expansion in the US and convince people internally of the market potential.»
Marketing Manager - Bonifaz-Kohler

«On DLF's (Danish Association of Fast Moving Consumer Goods Manufacturers) New Years Conference we had the great pleasure to hear ResearchFarm speak about future trends in online grocery retailing. The feed back from the conference participants was very positive as they gave ResearchFarm's presentation the highest score of all speakers, finding the analysis about the key success factors of chosen EU and US online retailers both very interesting and inspiring. We can therefore give ResearchFarm our best recommendation.»
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