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UK Women’s fashion online intelligence report, Oct 2011 – March 2012

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Abstracts

WHAT WILL YOU GET FROM THIS REPORT?

A who’s who in online womenswear clothing retail.

In-depth market analysis covering October 2011 to March 2012.

Over 100 individual pieces of key insights.

Over 50 individual pieces of statistical interpretation.

Analysis of 50 retailers across the top 100 online clothing retail keywords.

An interpretation of the top retailers search and social media strategies.

WHAT QUESTIONS DO WE ANSWER?

Who are the market leaders?

Which keywords are driving market visibility?

What are retailers doing to achieve maximum market share?

How are retailers using social media to acquire customers?

What will shape retail strategies in 2012?

TOP INSIGHTS

Multi-channel retailers dominate both search marketing and social media.

ASOS is the only retailer that is visible in the top 10 for all the primary keyword product markets including dresses, accessories and shoes.

House of Fraser leads the dresses keyword market with strong consistent rankings for all top volume terms including dresses, party dresses, evening dresses and maxi dresses.

No one single operator dominates all the top womenswear generic phrases terms, therefore competition between Boohoo, ASOS, Lipsy, Dorothy Perkins and Missguided remains intense.

New Look has developed a social strategy that has the most robust balance between engagement quality and volume.

Topshop has the most holistic Facebook and Twitter presence in which they have the largest audience that is both consistently and positively engaged.

KEY FINDINGS OF THE REPORT

Mounting pressure on household budgets are generating more online retail searches as people work harder to compare prices and track down value. The result is a dramatic increase in market competition as more and more multi-channel retailers (those using physical/high-street stores and the internet) go head to head with the pure online retailers for customers (source: Clothing Retailing - UK - October 2011: Mintel).

WHAT’S SHAPING ONLINE WOMENSWEAR?

Online clothing sales continue to buck the current economic climate growing by 20% on the previous year (source: Office for National Statistics).

97% of the most visible retailers within search are multi-channel high street brands (source: Office for National Statistics).

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Brand volume comprises 54% of all search volumes and plays a significant role in last click conversion.

Marks & Spencer, John Lewis, Next, New Look, Debenhams and ASOS take the lions share covering an impressive 62% of all brand search impression volume.

Dresses accounts for 50% of all product volume and is the most important non-brand keyword in women's online retail.

House of Fraser is the leading retailer for the keyword market dresses, pushing ASOS into second place.

Competition is fierce within the organic index for womenswear generic phrases. Boohoo leads with ASOS, Dorothy Perkins and Lipsy close behind.

Debenhams dominates the accessories paid and organic keyword search markets having solid coverage for jewellery, handbags and scarves.

Competing head-to-head with the top fashion brands are Amazon and eBay who both feature prominentlyfor a large number of the long tail phrases, out pacing retailers such as Boohoo, Very, Republic and Dorothy Perkins.

Both Amazon and eBay are providing consumers with a cost effective alternative and feature prominently for a large number of the long tail phrases in markets such as leggings, accessories and knitwear.

ASOS, Topshop and New Look are the most innovative retailers within social media, making the channel a key element of their online market strategy .

Retailers are primarily using price promotions and customer service content techniques on social media to engage with potential and existing customers.

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