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# E-COMMERCE EXPERIENCE REPORT

A Thorough  Analysis of the Fashion Market in Germany

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# FAST FASHION

# SUSTAINABLE COMMERCE

# ARTIFICIAL INTELLIGENCE

# SOCIAL COMMERCE

# LIVE SHOPPING

## INTRODUCTION

**Shopping goes digital!** In global e-commerce, fashion is without doubt one of the largest markets. In the digital fashion trade, trends are formed for the entire online trade, and the expectations of users are correspondingly high. With internationally renowned brands and innovative retailers, Germany is regarded as one of the fastest growing fashion markets in the world and is constantly shifting its customer base from the offline to the online world.

"Circular economy, lowsumerism (word creation from "low" and "consumerism") or sharing economy - the demand for the perfect balance of social commitment, ecological added value, digital innovation as well as financial success is increasing, also in the fashion industry." <sup>1</sup>

Without a doubt, it is clear that the fashion industry has a high level of maturity in e-commerce. Fashion already played a central role in the early days of online retailing, and even today **the fashion sector contributes around 23% to total online retailing in Germany.** Simultaneously, the fashion sector has also always been one of the pioneers in online retail when it comes to customer experience: this is where the foundation was laid for customer expectations when it comes to handling returns. With current trends such as live shopping, it is also the fashion & beauty sectors that are at the forefront of innovation in e-commerce.

That's why we would like to dedicate this issue of the E-Commerce Experience Report to the fashion industry: We examine on the following pages how the 20 largest online retailers in the German fashion market are positioned in terms of customer experience. We aim to objectively assess the entire user experience, from browsing experience to delivery processes and customer service. The results of the study are intended to serve as a benchmark for the current state of digital fashion retailing in Germany - and to identify areas where further improvements are possible. **Let's go!**

<sup>1</sup>Forbes <sup>2</sup>Statista



## SMOOTH SHIPPING AND RETURNS PROCESS

All 20 orders in the report arrived within the specified delivery period. The fashion shops also did not let themselves down when it came to processing and refunding the tested returns. Overall, the process was simple and smooth.

➤ Page 38

## MANY DIFFERENT PAYMENT OPTIONS

Payment habits and preferences vary widely among consumers. With an average of five payment methods on offer, fashion shops are well positioned!

➤ Page 34

## LIVE SHOPPING IS ALREADY ADAPTED IN THE SHOP AT HALF OF THE RETAILERS

Live shopping - the new magic bullet in e-commerce. Shops are recognizing the potential of social media and new sales formats from Asia and are showing a willingness to experiment in this area.

➤ Page 84

## SUSTAINABILITY FILTERS ARE STANDARD FOR ALMOST ALL SHOPS

Sustainability has long since ceased to be a mere trend and has become a social aspiration. The first approaches to this are being adapted - for example, clothing can be filtered for more sustainable alternatives.

➤ Page 64

## VIRTUAL SIZE ASSISTANTS ARE WIDELY USED

Digital size assistants help increase conversion rates and avoid returns. 17 out of 20 retailers offer at least one service for digital size advice. The most popular service is Fit Finder from Fit Analytics

➤ Page 86

## LACK OF TRANSPARENCY ABOUT PRODUCT ORIGIN

Only 2 shops specifically state on the product detail page where and under what conditions the garment was produced - this topic deserves more relevance and transparency.

➤ Page 64

## TOO FEW EXPRESS PAYMENT CHECKOUT OPTIONS

Express checkouts or wallet solutions such as Apple Pay or PayPal Express improve the user experience by significantly shortening the checkout process. An added value that is unfortunately integrated in only 5 shops.

➤ Page 34

## USER GENERATED CONTENT IS HARDLY USED

User-generated content in the form of reviews is one of the most important orientation aids for online shoppers. Only one retailer allows customers to add pictures to the customer rating, a full 9 retailers even offer no product rating options at all.

➤ Page 26

## LITTLE HIGH-QUALITY PERSONALIZATION

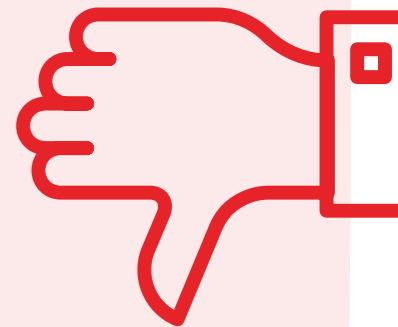
Personalized content based on purchasing behavior or customer data was clearly not available enough. In some cases, we were also shown content that did not match our buying behavior or data.

➤ Page 54

## INSUFFICIENT MOBILE PERFORMANCE

Although there are some shining examples in the industry, the majority of retailers still lag behind in mobile site performance. Also, the possibilities of Progressive Web Apps are still hardly adapted - here we had expected more

➤ Page 76



# 5 THUMBS DOWN

# MARKET OVERVIEW

First things first: Before we start with the actual report, we first want to subject the fashion industry to a basic check and take a dive into the...

## NUMBERS, DATA FACTS

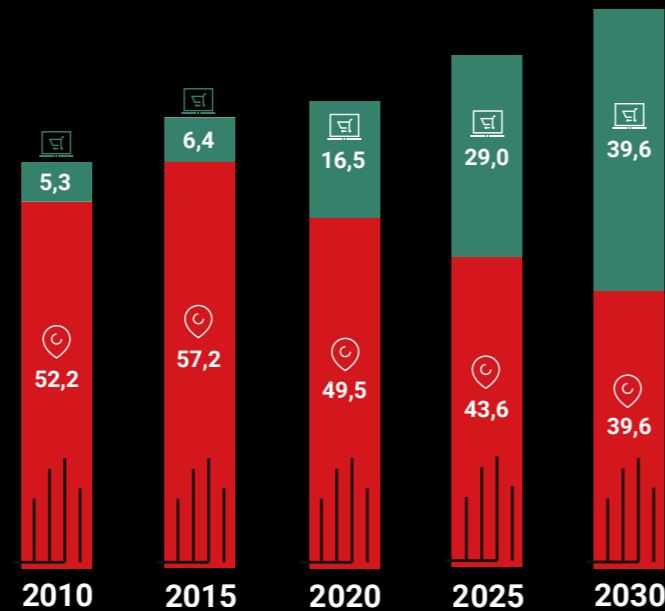
It's not a secret that the Germans like online shopping. Fashion in particular is popular, the virtual shopping carts are set ablaze here - and the sales trend clearly shows that this will remain in the coming years!

## MARKET LEADERS IN THE FASHION SECTOR

Once again, we wanted to know which are the 20 top-selling fashion online shops in Germany and thus make it into our E-Commerce Experience Report. And Here we go - these are the 20 "lucky" ones:

### PROJECTED SALES TREND

per channel until 2030 (in B€)



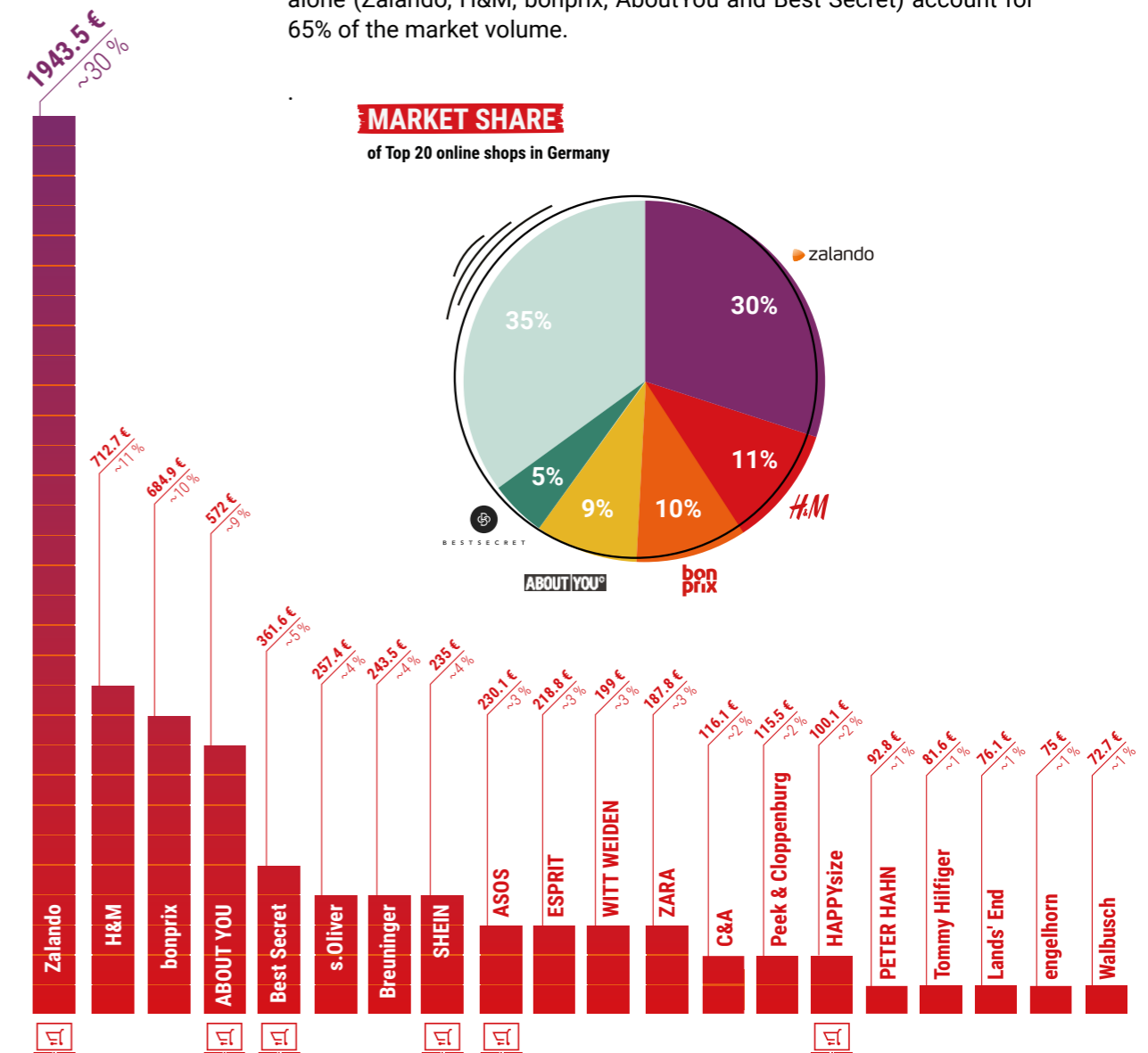
ONLINE

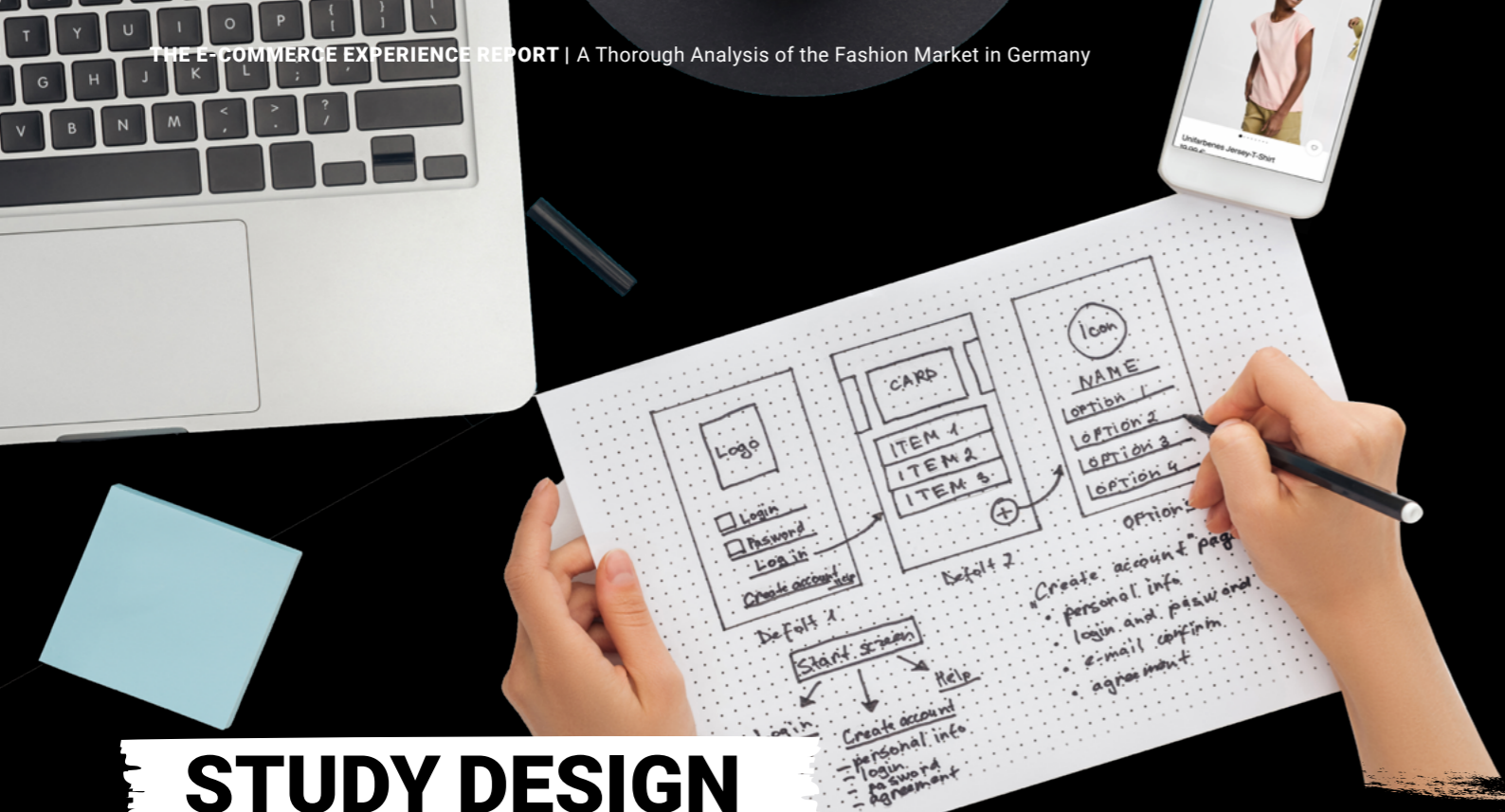
STATIONÄR

A closer look quickly show the "big players". The top 5 top-selling shops alone (Zalando, H&M, bonprix, AboutYou and Best Secret) account for 65% of the market volume.

### MARKET SHARE

of Top 20 online shops in Germany





# STUDY DESIGN

## HOW WERE THE SHOPS SELECTED?

In order to select the right shops for our study, we first identified the 20 most frequented online shops measured by traffic according to similarweb. We then compared this list with data from Statista and the EHI Retail Institute to ensure that we had made the right selection.

For better comparability, we only considered shops that carry a wide range of fashion items for the study. We also left out the two major generalists in German online retailing, Amazon and Otto, as their offerings are not limited to any one sector.

ABOUT YOU

ASOS

BESTSECRET

bonprix

Breuninger

C&A

engelhorn

ESPRIT

H&M

HAPPY SIZE

LANDS' END

Peek & Cloppenburg

Peter Hahn

s.Oliver

SHEIN

TOMMY HILFIFIGER

walbusch

WITT weiden

zalando

ZARA

# STUDY DESIGN

## WHAT TEST CRITERIA WERE DEFINED?

The stated goal of our e-commerce experience report: We want to neutrally show where the fashion industry currently stands in online retail. To this end, we have collected and quantified test criteria that provide information about how good the user experience is when shopping digitally. In doing so, we take into account both the online experience of the shop itself as well as analog processes that take place around online shopping - especially during the delivery or return of items.

**ON PAGE EXPERIENCE:**  
25 CRITERIA

**SERVICE & LOYALTY:**  
15 CRITERIA

**ORDER EXPERIENCE:**  
37 CRITERIA

**TECHNOLOGY & INNOVATION:**  
20 CRITERIA

**SUSTAINABILITY:**  
7 CRITERIA

**SUM**  
104 CRITERIA

## WHICH (TEST) PRODUCT WAS SELECTED?

To evaluate the quality of delivery and returns, we ordered a similar product from each of the fashion retailers studied. This was a branded t-shirt. For each of the retailers, we made sure to order a product marked as "available" in order to have a solid comparability of the delivery time.

## WHICH TEST PERIOD WAS SELECTED?

The entire study took place **between April 2022 and June 2022**. This includes both the investigation of technical aspects within the shops or apps and the execution of orders and returns as well as inquiries to the retailers' customer service.

Changes made to the shops of the retailers studied after this period can therefore no longer be taken into account in this report.

## AT A GLANCE



**Time of analysis:**  
04.2022 - 06.2022



**Product:**  
Brand T-Shirt



**Delivery:**  
by postal service

STUDY DESIGN

CUSTOMER EXPERIENCE

INTRO

The **customer experience** designates the sum of all experiences and touchpoints of a customer with a company or brand over the entire duration of the relationship.

**To illustrate**, when you go into a shop as a customer, you find yourself in a shopping situation where many aspects come together - premises, furnishing style, product presentation, atmosphere (lighting, music) and, above all, personal contact and interaction with the customer.

But what does that look like in the online world, where personal contact, for example, doesn't happen at all and **people also usually shop from their own homes?**

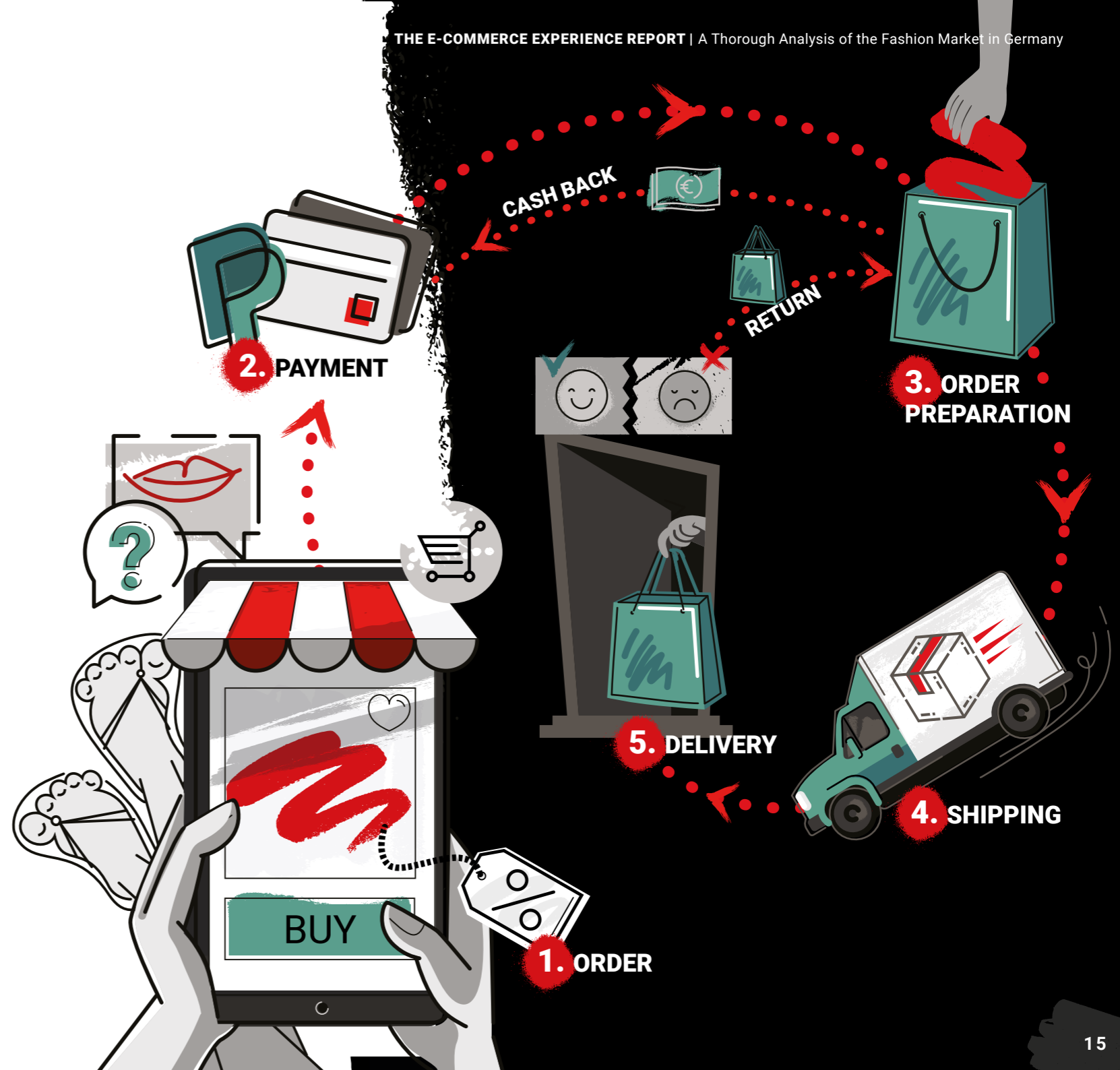
After all, the intention in both application areas is to offer customers all the services that will lead them to their desired product and satisfy them - in order to create loyal returning customers that do not cause expensive marketing cost to acquire in the first place.

In this context, online shops should ask themselves the **following question:**

- How appealing and clearly structured is the shop?
- How are the products presented?
- Is all important information available and easy to find?
- How is the ordering process designed?
- What payment methods are available?
- What does the returns process look like?
- How good is the customer service?

All the answers and assessments of these questions add up to the customer experience. And customers are merciless here: **If the customer experience is experienced as poor, the customer will no longer order from this online shop - worst case for online retailers!**

The task of this report is therefore also to test the shops examined from the customer's point of view and with a clear focus on the customer experience.





# ON PAGE EXPERIENCE

## THE FIRST IMPRESSION COUNTS

The customer's trust is often gained through content during product research. Appealing images, product descriptions, and other informative, entertaining, or interesting content, together with the price, determine whether the product is shortlisted. High-quality content not only influences the purchase decision, but can also reduce the return rate. **This is because high-quality content helps customers to better grasp the quality and fit of a garment when making a digital purchase.**

We therefore took a look at what the fashion industry has to offer here. **How are the products visually presented to the customer?** Is there any supporting social media content that is displayed in the shop? What about user-generated content - is the shop set up so that users can upload product photos and reviews themselves? This chapter is all about the interaction between content and commerce.



ON PAGE EXPERIENCE

# PRODUCT PRESENTATION & INFORMATION

Product images are one of the most important things in e-commerce. Unfortunately, their importance is nevertheless too often underestimated. .



**FOR 87% OF USERS, PRODUCT IMAGES ARE DECISIVE FOR COMPLETING THE PURCHASE!**

For this reason, we investigated whether the fashion industry covers the basics when it comes to displaying products:

## 1: PLP (Product Listing Page) or Category page

Most retailers know the importance and connection of conversion with their product detail pages. Investing time & money here is also super important. But what is often underestimated is the **PLP (Product Listing Page)**.

The PLP is the page that lists all products and, if you are interested in a product, the corresponding product detail page is just one click away.

These pages are often used as a catalog for products, but they can do much more! With a well-optimized PLP, merchants can boost their SEO, increase user engagement and improve conversion.

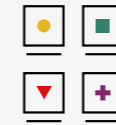
In the category pages, we have therefore paid attention to the following:

- Can I already see several perspectives of the garment (with/without model) here? Changeable by mouseover or arrow click?
- Can I set the product display of the complete PDP (model/packshot)?
- Will the different color options be displayed to me and will the images also adjust accordingly?
- Are the available sizes displayed, either statically or on mouseover?

**ONLY 1 SHOP HERE FULLY MET ALL OF OUR TESTED CRITERIA.**

It's a shame, because you can already do a lot right on the category page and convince customers with your products.

Quelle: 1) Ergonode, The importance of product photos in e-commerce, 2021



## Product Listing Page (PLP)

SHOP NAME	Product tile: packshot or model view as filter	Changing perspective	Displaying numerous available colors	Switching color on preview image	Displaying available sizes on product tile	
1. Breuniger	✓	○	✓	✓	✓	😊 5/5
2. ABOUT YOU	✓	○	✓	✗	✓	
3. C&A	✓	○	✓	✓	✗	😊 4/5
4. ESPRIT	✗	○	✓	✓	✓	
5. Peek & Cloppenburg	✗	○	✓	✓	✓	😊 4/5
6. s.Oliver	✗	🖱️	✓	✓	✓	
7. Zalando	✗	○	✓	✓	✓	😊 3/5
8. bonprix	✗	🖱️	✓	✓	✗	
9. H&M	✓	○	✓	✗	✗	😊 3/5
10. Lands' End	✗	○	✓	✓	✗	
11. SHEIN	✗	○	✓	✓	✗	😊 3/5
12. Walbusch	✗	🖱️	✓	✓	✗	
13. engelhorn	✗	○	✓	✗	✗	😐 2/5
14. HAPPYsize	✗	✗	✓	✓	✗	
15. PETER HAHN	✗	✗	✓	✓	✗	😐 2/5
16. WITT WEIDEN	✗	✗	✓	✓	✗	
17. Best Secret	✗	○	✗	✗	✗	😞 1/5
18. Tommy Hilfiger	✗	○	✗	✗	✗	
19. ZARA	✗	✗	✓	✗	✗	😞 1/5
20. ASOS	✗	✗	✗	✗	✗	



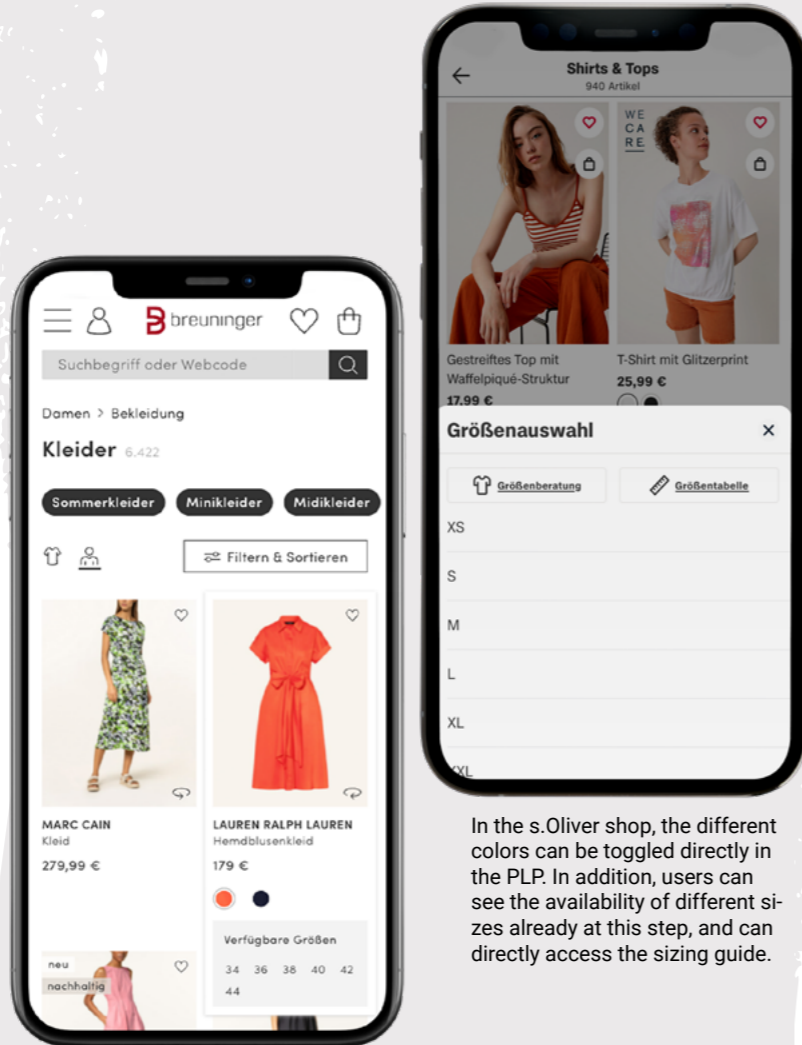
ON PAGE EXPERIENCE

PRODUCT PRESENTATION & INFORMATION

Breuninger's online shop deserves a positive mention.

Here, the display of the products can be changed from packshot to model (and vice versa) in advance. It is also possible to change the perspectives in the preview for a particular item of clothing and click through several photos. The different color options are also displayed and the product image changes accordingly.

The available sizes are also displayed in the preview. **So all the first important information is directly visible to the customer in the PLP.** This significantly increases the chance of completing a purchase and makes for a more pleasant shopping experience for the user .



In the s.Oliver shop, the different colors can be toggled directly in the PLP. In addition, users can see the availability of different sizes already at this step, and can directly access the sizing guide.

Product Detail Page (PDP)

SHOP NAME	Model	Perspectives	Videos	Rating
1. ASOS	✓	✓	✓	3/3
2. H&M	✓	✓	⦿	2.5/3
3. ABOUT YOU	✓	✓	✗	
4. Best Secret	✓	✓	✗	
5. bonprix	✓	✓	✗	
6. Breuniger	✓	✓	✗	
7. C&A	✓	✓	✗	
8. ESPRIT	✓	✓	✗	
9. HAPPYsize	✓	✓	✗	
10. Peek & Cloppenburg	✓	✓	✗	
11. PETER HAHN	✓	✓	✗	
12. SHEIN	✓	✓	✗	
13. sOliver	✓	✓	✗	
14. Tommy Hilfiger	✓	✓	✗	
15. Walbusch	✓	✓	✗	
16. WITT WEIDEN	✓	✓	✗	
17. Zalando	✓	✓	✗	
18. ZARA	✓	✓	✗	
19. engelhorn	⦿	✓	✗	1.5/3
20. Lands' End	✓	✗	✗	1/3

✓ completely  
⦿ partially  
✗ not available

2: PDP (Product Detail Page)

You like an item of clothing on the PLP, want to take a closer look at it and click on it - the product detail page opens. **Now it's getting serious, the click "to the shopping cart" is not far away.** It is therefore all the more important that the customer is provided with good content and information that encourages him to make a purchase. That's why we checked the visual presentation and also recorded the details with which the shops inform their potential customers. We tested the following criteria:

- Product presentation**
- Is the garment presented on models?
  - Are there different perspectives of the garment?
  - Do they even use videos to showcase products?

**It is pleasing that almost all shops use product photos with models and in total many different perspectives are shown, which represent the product well.**

ON PAGE EXPERIENCE

PRODUCT INFORMATION AND PRESENTATION

ONLY 1 SHOP USES VIDEOS IN THE PDP



Wasted potential for the online retailers, because **96% of consumers find product videos helpful in their purchase decision.**

To assess the quality of detailed product information, we looked at the following criteria:

- Are there any meaningful size specifications?
- Is the size of the model given as a reference?
- Are shipping and material info mentioned on the product detail page?
- Can you check online for in-shop availability if there are brick-and-mortar shops?

High-quality information is crucial for the return rate. Size information in particular plays a decisive role here. **In our view, the provision of size tables and measurements is an absolute "must-have" here.** If comparisons to model sizes are also provided, there is a greater chance that customers will get a much better and simpler idea of the accuracy of fit.



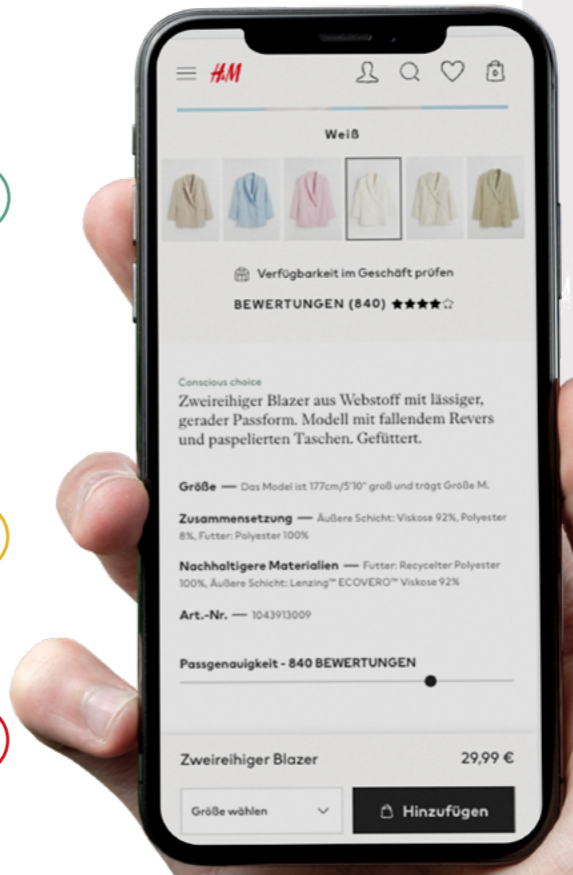
SHOP NAME	Size indication (with table)	Model size for reference	Shipping information	Material information	Check availability in store (omni channel)
1. ABOUT YOU	✓	✓	✓	✓	🛒
2. ASOS	✓	✓	✓	✓	🛒
3. Best Secret	✓	✓	✓	✓	🛒
4. C&A	✓	✓	✓	✓	✓
5. HAPPYsize	✓	✓	✓	✓	🛒
6. H&M	✓	✓	✓	✓	✓
7. Peek & Cloppenburg	✓	✓	✓	✓	✓
8. SHEIN	✓	✓	✓	✓	🛒
9. s.Oliver	✓	✓	✓	✓	✓
10. Tommy Hilfiger	✓	✓	✓	✓	✓
11. Zalando	✓	✓	✓	✓	🛒
12. Breuninger	✓	✗	✓	✓	✓
13. ESPRIT	✓	✓	✓	✓	✗
14. Walbusch	✓	✗	✓	✓	✓
15. ZARA	✓	✗	✓	✓	✓
16. bonprix	✓	✗	✓	✓	✗
17. engelhorn	✗	✓	✓	✓	✗
18. Lands' End	✓	✗	✓	✓	✗
19. PETER HAHN	✓	✗	✓	✓	✗
20. WITT WEIDEN	✓	✗	✓	✓	✗

🛒  
online only

😊  
100%

😐  
80%

😞  
60%



Slightly more than half of the retailers don't show any weakness when it comes to providing product information. We also like that 13/20 shops indicate the size of the model as a reference.

It is also pleasing that all shops give sufficient information about shipping and material in their PDP.

WELL DONE! - **H&M**, for example, comes up trumps with plenty of product information as well as size comparisons and a fit scale based on customer reviews.

ON PAGE EXPERIENCE

CROSS- & UP-SELLING-CONTENT



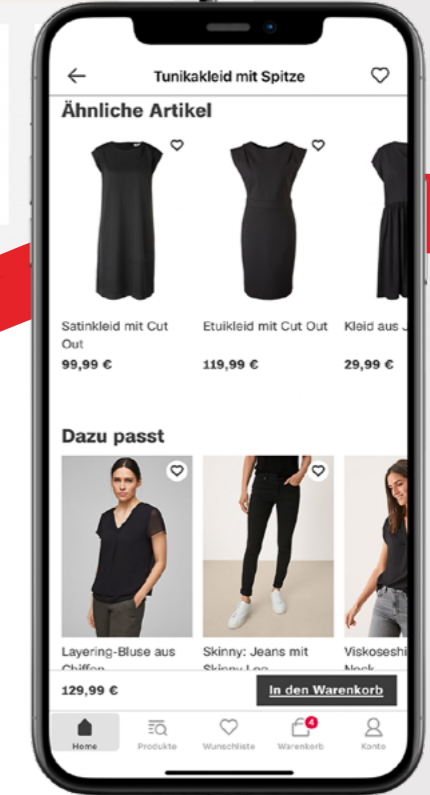
Cross & up-selling content means purchase incentives for further products that might fit the customer's actual need. This not only has economic advantages for the retailer by increasing the chance of a larger shopping cart. **It also benefits the customer experience for the user.** Why? When a shop shows a customer a matching accessory, for example, inspiration and thus shopping assistance is provided on the one hand. At the same time, the user saves time because he does not have to search for suitable items.

That's why we took a look at how retailers are already exploiting this potential:

- Are there general get the look/inspiration sites that invite you to browse outfits?
- Does the product detail page display "Get the Looks" or "This goes with it" that let you complete the whole outfit on the product image?
- Are "similar items" displayed to provide reasonable alternatives if the desired product is not available in the appropriate size?
- What have other customers bought in addition?
- Which products were viewed last?

SHOP NAME	Shop the look inspiration page	Get the look (PDP)	Complete the outfit (PDP)	Similar articles (PDP)	Customers also bought (PDP)	Last viewed (PDP)	
1. Peek & Cloppenburg	✓	✓	✓	✓	✗	✓	😊 5/6
2. ABOUT YOU	✓	🟡	✓	✓	✗	✓	😊 4.5/6
3. Breuninger	✗	✓	✗	✓	✓	✓	😊 4/6
4. engelhorn	✓	✗	✓	✓	✗	✓	
5. ESPRIT	✗	✓	✗	✓	✓	✓	😊 4/6
6. HAPPYsize	✓	✓	✓	✓	✗	✗	
7. s.Oliver	✗	✓	✓	✓	✗	✓	😊 4/6
8. Walbusch	✓	✓	✗	✓	✓	✗	
9. ZARA	✓	✓	✓	✓	✗	✗	😊 4/6
10. ASOS	✗	✓	✗	✓	✗	✓	
11. C&A	✗	✗	✓	✓	✓	✗	😐 3/6
12. PETER HAHN	✓	✗	✓	✓	✗	✗	
13. WITT WEIDEN	✗	✗	✓	✓	✗	✓	😐 3/6
14. Zalando	✓	✗	✓	✓	✗	✗	
15. H&M	✗	✗	✓	✗	✓	✗	😐 3/6
16. Lands' End	✗	✗	✗	✓	✓	✗	
17. SHEIN	✗	✓	✗	✗	✓	✗	😞 2/6
18. Tommy Hilfiger	✗	✗	✗	✓	✗	✓	
19. Best Secret	✗	✗	✗	✗	✗	✓	😞 1/6
20. bonprix	✗	✗	✗	✗	✓	✗	

✓ available  
🟡 partially  
✗ not available



At **Breuninger**, the PDP also displays the other items of clothing worn by the model in the product photos, in addition to the product actually wanted. A real shopping help if you like to buy whole outfits.

The online shop of **s.Oliver** shows on the PDP which similar and matching items are available for the desired garment.

ON PAGE EXPERIENCE

# CONTENT & COMMERCE: DO THEY GO THE EXTRA MILE?

## PRODUCT REVIEWS AND USER-GENERATED CON- TENT:

User-generated content in the form of reviews is one of the most important orientation aids for online shoppers. Reviews and shared opinions help online shops strengthen their brand - and boost sales when these customers express positive opinions. Free advertising and SEO boost - retailers should not do without these in any case.

their own photos of purchased products and upload them, which in turn makes the shopping experience much more authentic for potential customers.



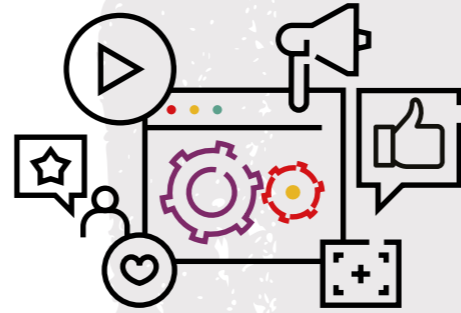
**Disappointing:** Only 1 retailer allows customers to add pictures to the customer review. That's lost marketing potential!



### 70% OF CONSUMERS

put more trust in reviews and recommendations than in the actual content made by the brand or shop.

Retailers can go one better by providing user-generated content with images and videos on the PDP - especially in a visual industry such as fashion. Customers can take



Only the online shop **Shein** can trump with user-generated content in the product reviews.

SHOP	Product rating available (PDP)	UGC: Reviews (PDP)	Blog posts	Video Content Blog	UGC: Social Media
1. SHEIN	✓	✓	✓	✗	✗
2. Zalando	✓	✗	✓	✓	✗
3. ASOS	✓	✗	✓	✗	✗
4. bonprix	✓	✗	✓	✗	✗
5. HAPPYsize	✓	✗	✓	✗	✗
6. H&M	✓	✗	✓	✗	✗
7. Lands' End	✓	✗	✓	✗	✗
8. Peek & Cloppenburg	✓	✗	✓	✗	✗
9. PETER HAHN	✓	✗	✓	✗	✗
10. Tommy Hilfiger	✗	✗	✓	✗	✓
11. Walbusch	✓	✗	✓	✗	✗
12. ABOUT YOU	✗	✗	✓	✗	✗
13. Best Secret	✗	✗	✓	✗	✗
14. Breuninger	✗	✗	✓	✗	✗
15. C&A	✗	✗	✓	✗	✗
16. engelhorn	✗	✗	✓	✗	✗
17. ESPRIT	✓	✗	✗	✗	✗
18. s.Oliver	✗	✗	✓	✗	✗
19. WITT WEIDEN	✗	✗	✓	✗	✗
20. ZARA	✗	✗	✓	✗	✗



ON PAGE EXPERIENCE

# CONTENT & COMMERCE: DO THEY GO THE EXTRA MILE?

## BLOG ARTICLES & SOCIAL MEDIA:

Overall, the fashion retailers offer a lot of additional, useful content in the form of blog posts in their shops. There is a lot on offer, from styling tips and the latest trends to digital buying guides. Appealing blog content in video format, on the other hand, is rarely used.

Unlike in the furniture industry which we have tested in the previous issue, user-generated content from social media is not established in online shops in the fashion industry. This is a missed potential, because such reviews, pictures, videos and shared opinions help online shops to strengthen their brand - and to boost sales if these customers express themselves positively. User-generated content also strengthens the organic search engine ranking of shops and should therefore be used more intensively.

### TOMMY HILFIGER SHOW HOW IT'S DONE!

The fashion retailer calls on customers to take a photo of their favorite outfits - the result is high-quality and authentic content that the online shop can use as inspiration and a decision-making tool for other customers.



### ONLY 1 SHOP

uses user-generated social media content in the shop.

## CONCLUSION:

Content is and remains one of the most important topics in online retail. The majority of international studies on content preference in online retail rank these three points as most important for the purchase decision:

- Complete and meaningful product information
- Product images in high quality and different perspectives
- Trustworthy customer reviews

**The fashion industry is solid in this area.** Product information and images are complete and in good quality at most retailers.

However, only a few retailers use the full spectrum in content marketing: Above all, user-generated content in the form of reviews or inspirations contribute in total to creating an informative and trustworthy digital shopping experience - this is where retailers still leave untapped potential.

## HIGHLIGHTS



Cross- and upselling content is increasingly finding its way into online shops - we like!



The potential of customer reviews and user-generated content is neglected in too many stores.



Content is king! Good product content increases visibility of the shop and sets it apart from competitors. In addition, this is one of the decisive factors for the return rate! The better and more detailed the content is, the smaller the risk that the customer's expectations will not be met in the end. The effort in the realization is therefore always worth it.

# ORDER EXPERIENCE

## IT'S ALL ABOUT SPEED

Once the content, product selection, and navigation have convinced potential customers, it's time to move on to the ordering process. Successful retailers have long since recognized how important a positive order experience is for users. This includes a simple checkout, reliable and fast delivery, and a transparent and user-friendly returns process.

These principles are particularly effective in fashion retailing. **This is because many purchases here are impulse purchases and not "compulsory purchases"**. Customers buy fashion online not only because of a rational need, but also as a pastime, out of boredom, or because they were spontaneously inspired while scrolling their social media feed.

**Brief digression:** women in particular tend to make impulse purchases when it comes to fashion, while men most often spend money spontaneously on electronics items - who would have thought...



ORDER EXPERIENCE  
**CHECKOUT**

**CAUTION, DANGER OF JUMPING OFF!**

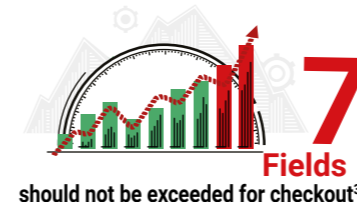
As e-commerce experts, we're always wondering why retailers don't pay much more attention to the checkout. After all, it is the decisive last hurdle before a prospective customer becomes a buyer - and the bounce rate at this point in the buying process is immense. The Baymard Institute calculates the global bounce rate from the shopping cart onwards at 70 percent. This means that not even one in three customers completes their purchase after items have been placed in the shopping cart.

Despite the immense importance of checkout, many retailers neglect it when designing their user experience.

The task of a good checkout is easily formulated: **A user should be able to complete his purchase in the shortest possible time.** After all, every second that users have to spend completing a purchase increases the likelihood of a purchase being abandoned and thus of lost sales.

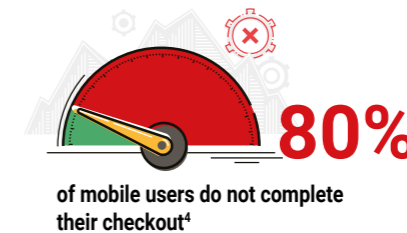
The screenshot shows a checkout form for 'Witt Weiden'. The 'Rechnungsadresse' section includes the following fields: ANREDE (Frau, Herr), VORNAME (Amelie), NACHNAME (Fischer), STRASSE UND HAUSNUMMER (Erika-Mann-Straße, 53), ADRESZUSATZ (OPTIONAL) (creativstyle GmbH), PLZ (80636), ORT (München), TELEFONNUMMER (OPTIONAL), IHR GEBURTSDATUM (21.04.1993), and DEIN LAND (Deutschland). There are two buttons: 'Weiter zur Bestellübersicht' and 'Abweichende Lieferadresse'. At the bottom, there is a 'Kundenservice' section with a phone number (01805212100), a note about calling hours, and an email address (kundenservice@witt-weiden.de). The footer contains 'Widerrufsrecht', 'Datenschutz', 'AGB', 'Impressum', and 'Newsletter abmelden'.

Best practice: With only five mandatory fields, the checkout of Witt Weiden is a positive example of a quick checkout design.



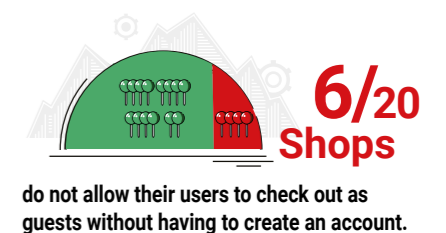
Studies by the Baymard Institute show that the probability of completing a purchase decreases with each additional form field in the checkout. On average, fashion retailers ask for 7.8 mandatory fields when completing a purchase - that's a reasonable figure. **Including optional fields, the average is 12.5.**

**This value is still too high:** 80% of mobile users bounce in the checkout. This figure makes it clear that fashion retailers should pay even more attention to a short and smooth checkout in order to increase their conversion rate.



Therefore, the solution approach is: Reduce unnecessary inputs to decrease the time spent in the checkout. First and last name can be collected in one field. The place of residence can be filled in via auto-completion after entering the postal code. Different delivery addresses only become visible after selecting a corresponding checkbox.

**These approaches are not implemented among the majority of merchants in the fashion industry.**



In addition, just under a third of the retailers surveyed do not allow guest orders. Guest ordering removes a significant hurdle when completing an order, **as 24 percent of all users state that the creation of a customer account is a reason for them to abandon the purchasing process.**

Even more helpful than the option of guest ordering is **the offer of express checkouts**, i.e., the conclusion of a purchase with just one click via shopd user data in payment services such as PayPal, Amazon Pay or Apple Pay. More on this in the following chapter on payment.

Sources:  
3) Baymard Institute, Checkout Types & Layout Guidelines, 2022  
4) Barilliance Cart Abandonment Statistics, 2022

ORDER EXPERIENCE  
PAYMENT

mollie

Guest article by payment expert Pascal Matern about the state of digital payments in the fashion industry: don't botch the final steps, especially for mobile users!



The topic of payment plays a crucial role in the checkout, because purchase abandonment can still occur frequently in this last step. **The lack of a preferred payment option is one of the main reasons for purchase abandonment during the checkout process.** In order to avoid purchase aborts, it is worthwhile to offer the common payment methods.

In the fashion industry, purchase on account is particularly popular, as customers like to try on the goods they have ordered before making payment. The major fashion retailers obviously have this in mind:

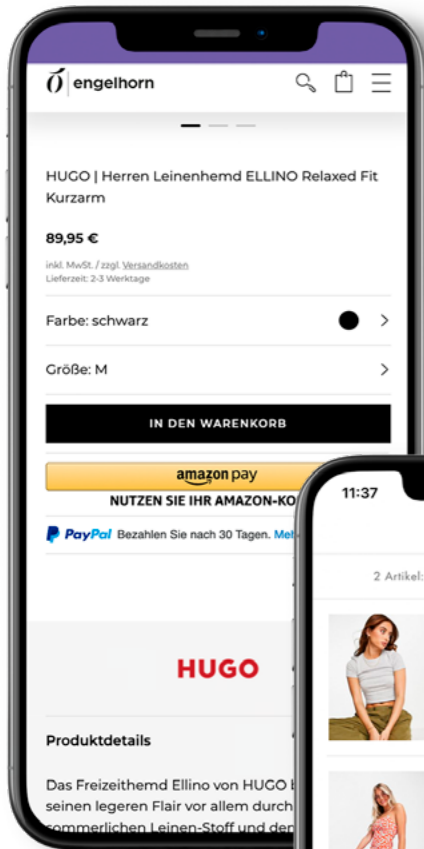
**18/20 RETAILERS** offer purchase on account as a payment method.

In general, the fashion retailers cover the basics solidly when it comes to payment: 5.1 different payment methods are offered on average, a solid value. It seems clearer for customers if only the 4-5 most popular payment methods are displayed in the checkout. Additional payment methods can then be displayed via a button.



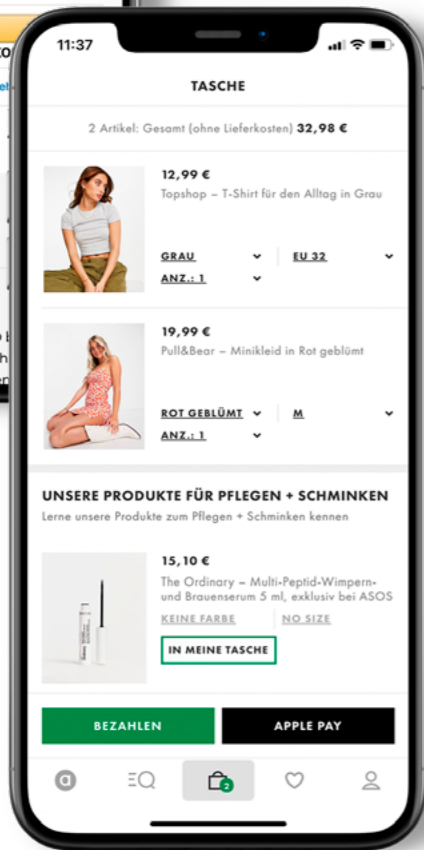
Available payment options

SHOP NAME	Credit Card	Paypal	Invoice	Sofort	Gift Card	Debit	Pay in advance	Apple Pay	Giropay	Cash on delivery	Rate payments	Amazon Pay	
1. ABOUT YOU	☑	☑	☑ K.	☑ K.	☑	☑			giropay				😊 7/12
2. bonprix	☑	☑	☑	☑ K.		☑	☑		giropay				😊 7/12
3. H&M	☑	☑	☑ K.	☑ Sofort	☑			Apple Pay			☑ K.		😊 7/12
4. ASOS	☑	☑	☑ K.	☑ K.	☑			Apple Pay					😊 7/12
5. Best Secret	☑	☑	☑	☑ Sofort	☑	☑							😊 6/12
6. Walbusch	☑	☑	☑		☑	☑			giropay				😊 6/12
7. Zalando	☑	☑	☑		☑	☑	☑						😊 6/12
8. ZARA	☑	☑	☑	☑ Sofort	☑			Apple Pay					😊 6/12
9. C&A	☑	☑	☑	☑ K.			☑						😊 6/12
10. engelhorn	☑	☑		☑ Sofort	☑							pay	😊 6/12
11. SHEIN	☑	☑	☑ K.	☑ K.				Apple Pay					😊 6/12
12. s.Oliver	☑	☑	☑				☑			☑			😊 5/12
13. WITT WEIDEN	☑	☑	☑							☑	☑		😊 5/12
14. Breuninger	☑	☑	☑		☑								😊 5/12
15. ESPRIT	☑	☑	☑	☑ K.									😊 5/12
16. HAPPYsize	☑	☑					☑			☑			😊 5/12
17. Lands' End	☑	☑	☑			☑							😊 4/12
18. Peek & Cloppenburg	☑	☑	☑	☑ K.									😊 4/12
19. Tommy Hilfiger	☑	☑	☑		☑								😊 4/12
20. PETER HAHN	☑		☑										😊 2/12



Engelhorn offers an express checkout via Amazon Pay. This allows the user to pay with his Amazon account with one click.

At Asos, the user is shown Apple Pay as an express option only from the shopping cart - that's how it should be!



**ONLY 5/20 ONLINE SHOPS OFFER EXPRESS CHECKOUTS SUCH AS PAYPAL EXPRESS, AMAZON PAY OR APPLE PAY.**

The third-party payment service "Paypal" has become **one of the most popular payment methods for online shopping**. With the exception of Peter Hahn, all of the retailers offer this service. Credit card payments are also supported by all of the retailers surveyed. However, there is still room for improvement here: 8 out of 20 merchants redirect to a new page for credit card payments, instead of processing the payment ideally in an iFrame directly in the checkout. This disrupts the user experience and lowers the conversion rate in the final, decisive step.

Even more serious, however, is the fact that the majority of the fashion retailers surveyed **do not offer any express payment methods**. This refers to payment options that allow even unregistered users to complete their purchase with just a few clicks and without entering address or payment data. These include services such as Paypal Express, amazon pay, Apple Pay or Google Pay. This is a great advantage, especially for shoppers on mobile devices!

"Even more serious, however, is the fact that the majority of the fashion retailers surveyed do not offer any express payment methods."

**Positive examples (images on the left side):** Engelhorn offers express checkout via Amazon Pay. This enables users to complete their purchase with just one click, using their Amazon account.

At Asos, Apple Pay as an express payment option is shown only after a user navigates to the cart - that's how it should be!

**Mollie recommends: Fashion shoppers buy impulsively! An express checkout immensely increases the chance of short-decided shoppers. However, the button should not yet be placed directly on the product detail page, because in this case customers buy directly instead of adding more items to the shopping cart!**

**Conclusion:** Regarding the number of available payment options, the fashion merchants are in good shape. Especially purchase on account and PayPal are important methods and are offered across the board. But there's room for improvement: express checkout options are easy to implement and can prove to be a competitive advantage, especially for younger audiences!

More about Pascal Matern:

**mollie**

[mollie.com](https://mollie.com)

Pascal, Partner Manager at our partner Mollie, helped us evaluate payment methods and recommendations.

Mollie is an international payment service provider that currently serves 130,000 merchants in Europe and has been on a mission to make payments uncomplicated for its customers for 18 years.

If you have any questions about payment, please contact Pascal at

[pascal.matern@mollie.com](mailto:pascal.matern@mollie.com)



ORDER EXPERIENCE

SHIPMENT & DELIVERY

In order to get the broadest possible insight into the shopping experience in the fashion industry, we decided to place orders with the top 20 fashion shops - **2 shirts each**.

As e-commerce experts, we also know the problem of address additions in the order. If online shops offer the possibility to add an address suffix - which is not always the case - it happens more often than you'd think that the data is not transferred onto the shipping label and therefore the order cannot be delivered.

We therefore ordered the T-shirts to our offices in Munich to test this aspect as well.

DELIVERY OPTIONS

Before we ordered the shirts to our office, we first checked if and which delivery options were available in the shops.

**Retail in flux:** Delivery to a Packstation instead of to one's own home is a service that many online shoppers appreciate. In the event that you are not at home at the time of delivery, the Packstation is a popular delivery option. This is because a Packstation makes it possible to pick up parcels and packages easi-

ly, quickly, without having to wait in line, and in a straightforward manner - 24/7. **It is very pleasing that almost all shops offer this service to users.**

The possibility of picking a desired delivery date, on the other hand, is not yet as established in the fashion industry.



**18/20 SHOPS** offer pickup at a Packstation.



Only **7/20 SHOPS** allow you to select specific dates or express delivery in the shipping method.



SHOP NAME	DELIVERY TIME (in working days)															Pick up at pack station	Express or fixed day delivery	Click & Collect	Automated communication delivery / returns	Parcel tracking	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15						
1. ASOS	✓	✓														✓	✓ (premium)	🛒	✓	✓	😊
2. Breuninger		✓	✓	✓												✓	✓	✓	✓	✓	
3. s.Oliver			✓	✓	✓											✓	✓	✓	✓	✓	
4. Zalando		✓	✓	✓												✓	✓	🛒	✓	✓	
5. Best Secret		✓	✓	✓												✓	✗	🛒	✓	✓	😊
6. bonprix		✓	✓	✓												✓	✗	✓	✓	✓	
7. engelhorn		✓	✓	✓												✓	✗	✓	✓	✓	
8. ESPRIT			✓	✓	✓											✓	✓	✓	✗	✓	
9. H&M		✓	✓	✓												✓	✗	✓	✓	✓	😊
10. Peek & Cloppenburg		✓	✓	✓												✓	✗	✓	✓	✓	
11. Tommy Hilfiger		✓	✓	✓												✓	✗	✓	✓	✓	
12. ZARA			✓	✓	✓											✓	✓	✓	✗	✓	
13. Walbusch			✓	(keine Lieferzeit angegeben ist)												✓	✗	✓	✓	✓	😊
14. ABOUT YOU		✓	✓	✓												✓	✗	🛒	✗	✓	
15. C&A		✓	✓	✓	✓											✗	✗	✓	✓	✓	
16. PETER HAHN		✓	✓	✓												✓	✗	✓	✗	✓	
17. WITT WEIDEN		✓	✓	✓												✓	✓	✗	✗	✓	😐
18. Lands' End				✓ (zu früh)	✓	✓	✓	✓								✓	✗	✗	✓	✓	
19. SHEIN							✓ (zu früh)	✓	✓	✓						✓	✗	🛒	✗	✓	
20. HAPPYsize		✓	✓	✓												✗	✗	🛒	✗	✓	

ORDER EXPERIENCE

SHIPMENT & DELIVERY



**12/20 SHOPS**  
offer "Click and Collect".

During the pandemic, the "Click & Collect" concept was popular and helped many retailers stay afloat. But even beyond that, **Click & Collect offers great potential for dovetailing online and offline** - multichannel shopping is the appropriate keyword here. This allows retailers to expand their customer base or cater to customers with different needs, thus increasing profitability.

Another major advantage is that with Click & Collect, customers can try on the goods directly on site and, ideally, return them directly and also look around for other items of clothing in the shop; likewise, there are usually no shipping costs. **Win-win for both sides.**

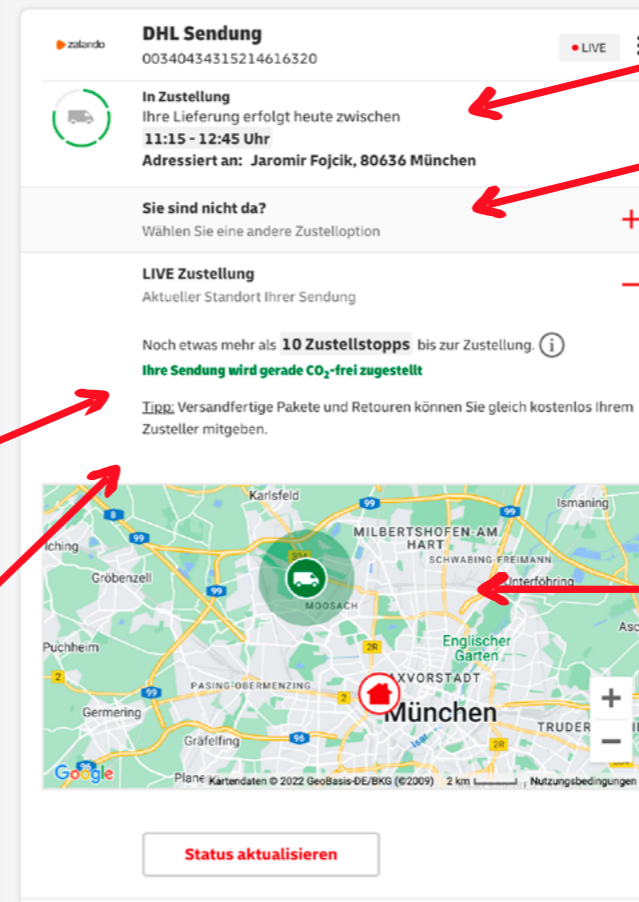
SHIPPING & COMMUNICATION

After we ordered all the shirts, we checked our mailbox regularly until the arrival of the t-shirts and documented how the communication is regarding the shipping. Is there automatic shipping notification and tracking?



**EVERY SHOP**  
offers shipment tracking.

Shipment tracking is highly practical for users, especially if you are urgently waiting for a package and might not be at home. **A best practice can be seen here, for example, at Zalando. A lot of information can be read from the shipment tracking:**



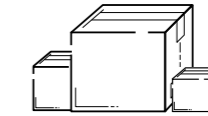
Indication of the Delivery period

Delivery option flexible changeable

CO2-neutral Delivery

Useful tips

Delivery in real time and traceable on the map



The packages were delivered after an average of **3 DAYS.**

Only the shop "Shein" dances here with 7 business days from the row and increases this average value. However, the shirt was also shipped from abroad and the long waiting time was communicated accordingly in advance. **All in all, this is a pleasing result.**



**NONE OF THE PACKAGES WERE DELIVERED LATE OR NOT AT ALL - ALL SHOPS (20/20) MET THE STATED DELIVERY DATE.**

As already mentioned at the beginning, it was also important for us to test whether we could specify our company address in an address supplement and whether this was actually adopted on the shipping label. If we think back to the furniture report, there were unfortunately some difficulties here. All the more pleasing, then, that things run more smoothly in the fashion sector. It was a shame that we couldn't specify an address suffix when ordering from the shops "Shein" and "Asos" and that we had to enter our company address in the last name field - but in the end these orders also arrived in time.

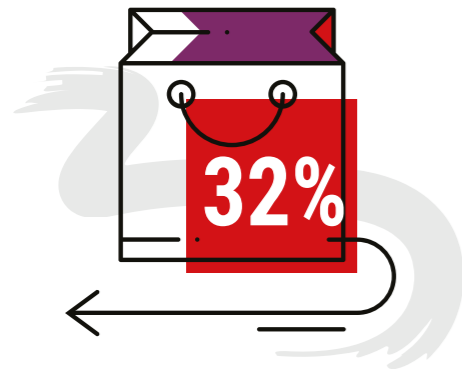
## ORDER EXPERIENCE RETURN PROCESS

The item you ordered finally arrives! But then the disappointment is great. The garment doesn't fit or you don't like it after all - you have to return it.

### SHORT DIGRESSION: FACTS ABOUT RETURNS IN THE FASHION INDUSTRY

Overall, Germans are a big fan of returning items ordered on the Internet. **For 77 percent of consumers, uncomplicated returns are an important criterion when choosing a retailer.** And the absolute figures are enormous when you look at the returns rate in the fashion industry.

#### RETURN RATE



Annoying for the consumer, because of the frustration and unnecessary effort, but also expensive for the retailer itself.



**Returns - an absolute problem in the fashion industry.** Measures to avoid returns are therefore currently a top priority for many online retailers. The negative environmental impact is also becoming more of a focus for consumers - solutions are needed. How to counteract this?

**According to EHI, the most important measure is to provide the most detailed product information possible in the online shop.** You can read about how our shops perform here in the On Page Experience chapter on page XY.

**Optimizing the shipping packaging comes in second place.** It not only ensures that the items arrive undamaged, but can also be used by customers for return shipping. We have also taken a closer look at this aspect in the next chapter "Sustainability". The results can be found on page 62.

## THE RESULTS

It is clear that returns cannot always be completely avoided despite all possible measures. That's why we wanted to know how the returns process is organized and handled at the individual shops.

**The return period is 47 days on average. Here, the range was quite large, from 14 to 120 days.** Not included was the online shop Lands' End, which states the following in its FAQ's on returns: "All items purchased from us can be returned at any time."

Good news for the user: returns were free of charge at all retailers.

## Return label included?



A real pain when returning products: when you have to print the return label yourself, even though many consumers no longer have a printer at home. That's bad customer experience - hence we wanted to know if the return label is already included in the package (or a QR code can be scanned).



## ORDER EXPERIENCE RETURN PROCESS

In addition, we wanted to know whether you can select a corresponding shipping service provider for returns and thus be more flexible when returning the goods.

**WITH 10/20 SHOPS**  
you can decide and choose  
between shipping service providers.

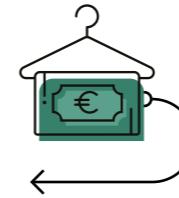
### Can I choose the shipping service provider?



More flexibility for returns by choosing the preferred shipping service provider: how many merchants make their customers' lives easier by letting them choose the most convenient provider for them?



All in all, the returns process went smoothly and the refunds were paid within a reasonable timeframe: **On average, returns took 9.4 days to be processed.** Witt Weiden and ASOS were negative exceptions, as we had to wait more than three weeks for the refunds to arrive - that creates discontent for shoppers.



### How long did it take to complete the refund?

(DURATION IN CALENDAR DAYS)

H&M	5 DAYS
Peter Hahn	5 DAYS
ABOUT YOU	5 DAYS
BESTSECRET	5 DAYS
breuninger	5 DAYS
s.Oliver	5 DAYS
TOMMY HILFIGER	5 DAYS
zalando	7 DAYS
HAPPYsize	7 DAYS
engelhorn	7 DAYS
ZARA	8 DAYS
C&A	8 DAYS
bonprix	9 DAYS
walbusch	10 DAYS
SHEIN	11 DAYS
ESPRIT	12 DAYS
Peek.Cloppenburg	13 DAYS
LANDS' END	14 DAYS
WITT weiden	23 DAYS
ASOS	24 DAYS

## HIGHLIGHTS



Both the shipping and return processes were quick and without any major problems - all in all, a really good order experience.



There were still a few shops with outliers - here we would like to see a good customer experience throughout the Basics.



The customer experience does not end with the delivery of the goods. Only those who enable a smooth returns process can enjoy returning customers.

## SERVICE AND LOYALTY

### CUSTOMER ENTHUSIASM AS A SUCCESS FACTOR

Given the enormous number of online shops, customers are spoilt for choice when it comes to choosing a specific retailer. The competitive pressure is great and it is important for retailers to consider how best to convince the coveted online shoppers of their own shop.

How do you achieve customer loyalty? Of course, through the satisfaction of the customer! If the customer is happy, the chance that he will buy again is very high. Customer orientation is the magic word here: **the customer is king.**

We therefore wanted to know what online shops have to offer in this respect:

- What does customer service look like?
- Are there any bonus programs or loyalty points?
- How is the customer approach & communication? Is there even personalized content?

Already half of consumers switch to the competition after a single bad experience with a shop.

Several bad experiences have prompted as many as 80% to switch.

good  
goodbye  
no one  
only





SERVICE & LOYALTY

CUSTOMER SERVICE

The importance of good customer service in e-commerce is often criminally underestimated. Yet good service is the be-all and end-all if retailers want to stand a chance against giants like Amazon. This is because customers naturally look in vain for opportunities for personal contact, background questions about products and individual advice.

If you shop at a brick-and-mortar shop, you can approach an employee directly and ask him or her questions. That's not quite as easy online. Or does it? We wanted to find out more and took a look at how the shops are set up.

What channels are available for contacting employees?

With three available ways of getting in touch, the fashion industry sits below average. However, Peter Hahn and Witt Weiden are positive exceptions with 6 different contact channels each.

The most frequently offered communication channel is the telephone hotline.

ONLY 9/20 ONLINE SHOPS use chat as a communication channel

Unfortunately, the fashion industry is also losing out on consulting appointments:

With the exception of Witt Weiden and Peter Hahn, none of the retailers surveyed has yet integrated a free customer advisory service into the shop. Options for making an appointment for a video chat or WhatsApp video call, for example, to get fashion advice, are generally sought in vain.

GOOD: 105 HOURS average availability of customer service

With an average of 105 hours per week, accessibility in the shops is very high.



Communication channels

SHOP	Telephone	Contact form	Chat	E-Mail	Whatsapp/Messenger	Consultation	Letter	Fax	Availability in hours/week	Score
1. PETER HAHN	☎	📄		✉		🗣️	📧	📠	168 h	6/8
2. WITT WEIDEN	☎	📄	💬	✉	🗣️	🗣️			168 h	5/8
3. ESPRIT	☎	📄	💬	✉	🗣️	🗣️			84 h	4/8
4. Lands' End	☎		💬	✉			📧		168 h	3/8
5. Peek & Cloppenburg	☎	📄	💬	✉			📧		84 h	2/8
6. C&A	☎	📄		✉			📧		68 h	1/8
7. HAPPYsize	☎	📄		✉					108 h	0/8
8. Zalando	☎	📄	💬						98 h	0/8
9. Breuninger	☎	📄				🗣️			72 h	0/8
10. s.Oliver	☎	📄			🗣️				70 h	0/8
11. ZARA	☎		💬		🗣️				57.5 h	0/8
12. SHEIN		📄	💬		🗣️				?	0/8
13. Walbusch	☎	📄							119 h	0/8
14. bonprix	☎	📄							111 h	0/8
15. H&M	☎		💬						96 h	0/8
16. ABOUT YOU	☎	📄							92 h	0/8
17. Tommy Hilfiger	☎	📄							84 h	0/8
18. engelhorn	☎			✉					63 h	0/8
19. ASOS		📄	💬						?	0/8
20. Best Secret	☎			✉					?	0/8

SERVICE & LOYALTY  
**CUSTOMER SERVICE**



### Customer Service

Total time to answer both questions, and quality of the answers provided by customer service.



SHOP	Question 1	Answer 1	Q2	A2	Questions answered?
1. H&M	00:05 h				
2. Lands' End	00:11 h				
3. s.Oliver			11:53 h		
4. bonprix			14:04 h		
5. PETER HAHN			17:33 h		2/2
6. WITT WEIDEN			22:22 h		
7. engelhorn			28:00 h		
8. C&A			47:23 h		
9. ABOUT YOU			48:37 h		
10. Tommy Hilfiger	01:32 h				
11. ESPRIT			21:11 h		
12. Walbusch			25:19 h		1/2
13. HAPPYsize			25:40 h		
14. ZARA				∞	
15. ASOS				∞	
16. Best Secret				∞	
17. Breuninger				∞	
18. Peek & Cloppenburg				∞	
19. SHEIN				∞	
20. Zalando				∞	0/2

#### THE STRESS TEST

In addition, we wanted to test the extent to which the retailers' digital contact channels are suitable for clarifying background questions about products. To test the retailers' service quality, we selected a product from each shop and asked 2 questions.

#### We wanted to know:

- Where is the corresponding T-shirt produced?
- What happens to the returns when they come back to the retailer?

Both legitimate and good questions to answer.

We deliberately chose these questions with a sustainability context, as most retailers did not provide any information about this in the shop.

### ONLY 9/20 SHOPS

could answer both questions.

6 out of 20 even answered neither.

The respective time taken to answer the questions was also measured. Where possible, we used the contact form or e-mails as a service channel to keep the data comparable.

Alles klar, vielen Dank für die ausführliche Antwort. Eine Frage noch - Was passiert mit meinen Retouren, nachdem ich sie an euch zurückgeschickt habe? Wenn Sie mir dazu noch eine Auskunft geben können, wäre das super. Vielen Dank!

**creativestyle**

Liebe Frau xxxx

[...] Alle Waren werden in so genannten Retourenbetrieben sorgfältig geprüft. Die ganz große Mehrheit der Waren kann sofort wieder in den Verkauf gehen.

Ein kleiner Teil der Waren muss optisch aufbereitet werden und wird dann ebenfalls zum Verkauf gestellt. Nur ein ganz geringer,Prozentteil der Retouren kann nicht mehr in einen neuwertigen Zustand versetzt werden und wird über spezialisierte Betriebe einer Wiederverwendung zugeführt. Bei Textilien sind es Großhändler, die Second-Hand-Ware vertreiben.

Die Quote von Produkten, die am Ende einer Verwertung zugeführt werden müssen, weil sie stark beschädigt sind und nicht repariert werden können, liegt in einem Bereich von deutlich weniger als 0,5 Prozent. [...] Diese Produkte werden dann in der Regel einer energetischen Verwertung zugeführt.

Es grüßt Sie freundlich  
xxxx

**bonprix**

**20 HOURS**  
average response time

**Bonprix**, for example, scores with a very detailed and high-quality answer.

On average, the retailers needed 20 hours to answer both questions. Given the speed of digital commerce, this is still not ideal for providing the user with a satisfactory shopping experience - especially if the quality of the answers leaves something to be desired, as in our test.

SERVICE & LOYALTY

COMMUNICATION & PERSONALIZATION

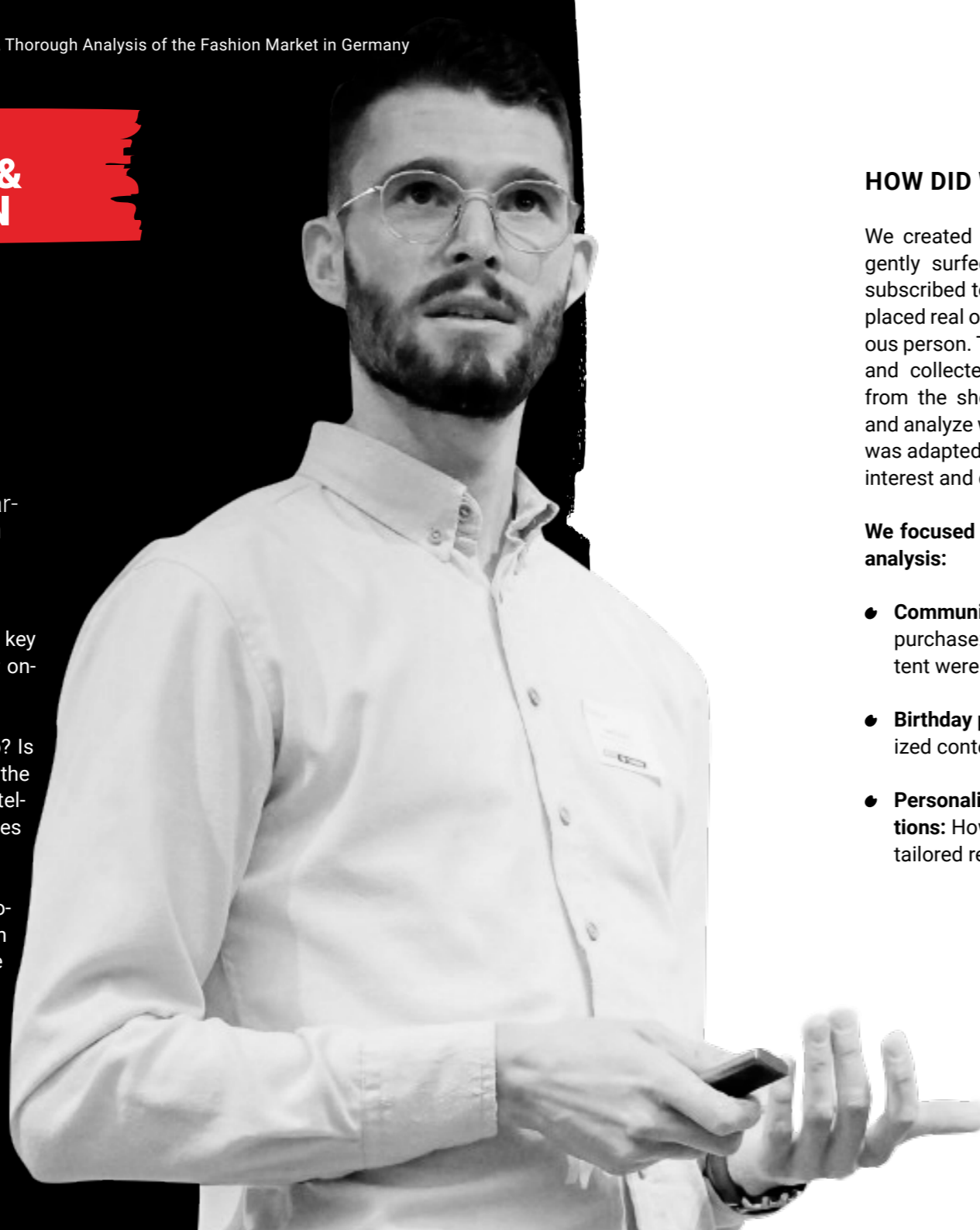


Industry Expert Niels Kolijn of dotdigital on the status quo regarding customer communication and personalized offerings.

Communication and personalization are key building blocks for customer loyalty for on-line retailers.

But how far can and should retailers go? Is it enough to address them by name in the newsletter? What role does artificial intelligence play and what opportunities does it offer?

We wanted to know what impact customer targeting and personalization has on the customer experience and how the top 20 fashion shops are positioned in this area.



HOW DID WE GO ABOUT IT?

We created an account in each shop, diligently surfed through the product pages, subscribed to the newsletter and, of course, placed real orders - all in the name of a fictitious person. To do this, we created a mailbox and collected all the incoming messages from the shops in order to evaluate them and analyze whether the customer approach was adapted to our buying behavior, product interest and customer data.

We focused on the following criteria in our analysis:

- **Communication** before and after the purchase: How often and with what content were we contacted?
- **Birthday programs:** Do we get personalized content and offers for our birthday?
- **Personalization/product recommendations:** How do shops use our data for tailored recommendations?

RESULTS:

**920 EMAILS**  
in 2 months

**ON AVERAGE 46**  
mails per shop

While there are definitely a number of brands doing it right, it was shocking to see the amount of emails that were solely pursuing "pushing" content and driving instant conversions - or simply put, classic spam.

**Quality over quantity - as a shop, while it's important to leverage customer data, there should also be a balance between frequency and content.**

**15/20 SHOPS**  
sent us a welcome  
e-mail.



In terms of content, we were introduced to brands and loyalty programs here, referred to apps, sent loyalty programs and discount codes.

# COMMUNICATION & PERSONALIZATION

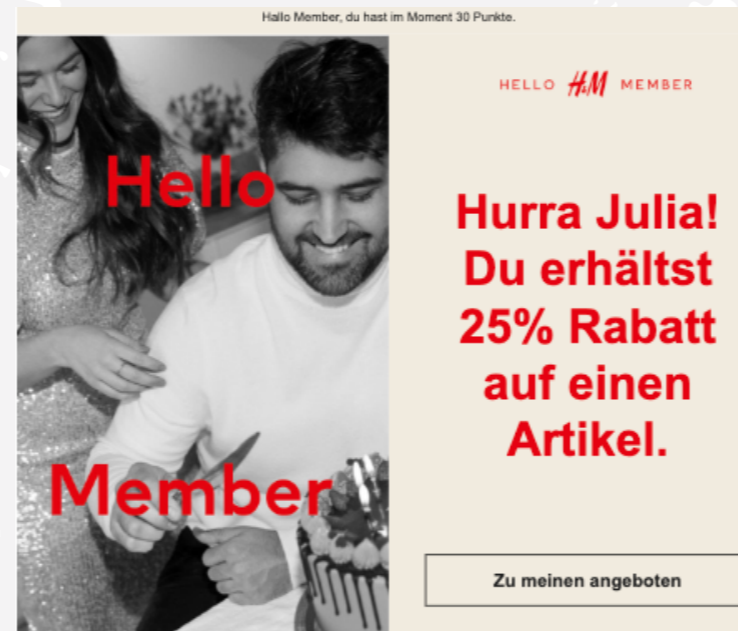
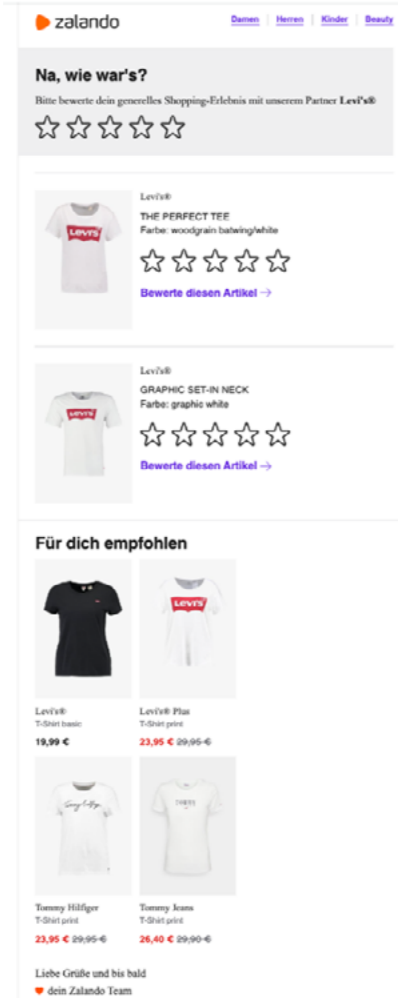
Post-purchase approaches were also used by the majority of shops:

## 13/20 SHOPS

sent us an email after our order. Qualitatively, however, these left much to be desired.

Most shops use this email to ask for a rating. There was little personalized content, such as purchase recommendations based on the purchase - only Zalando and H&M could convince us there. Here, we could directly and easily rate the products and similar products were suggested to us based on the purchase:

In terms of content, most campaigns were very similar: Congratulations, discount codes or a free shipping offer. There were hardly any specific and, above all, personalized product recommendations here.



A positive example is shown by H&M, which links to a page with personal recommendations and uses our data specifically.

## ONLY 8/20 SHOPS

use birthday campaigns

## CONCLUSION:



Personalized content based on purchasing behavior or customer data was clearly not available enough. In some cases, we were also shown content that neither matched our purchasing behavior nor our data. In terms of quality, there is still a lot of work to be done here. Overall, we had flooded inboxes with a lot of advertising and also many discount codes. We agree that discount codes are a good tool for customer retention. However, they are often not used wisely and at the right time, for example, when a shop notices that nothing has been purchased for a while or the shop has been visited several times without completing a purchase. Shopping cart abandonment campaigns have proven to be a particularly effective tool: Here, customers are specifically animated after they have not completed their checkout. If these interactions are combined with a discount, the likelihood of a purchase being completed increases - by around 20% on average globally.

more about dotdigital:



[dotdigital.com](https://www.dotdigital.com)

Niels, Partner Manager at our partner dotdigital, helped us evaluate email communication & personalization.

Dotdigital's Engagement Cloud enables 4,000+ brands in 150 countries to acquire, convert and retain customers for the long term. A global company with over 350 employees, dotdigital has been dedicated to serving companies of all sizes and across all industries for more than 20 years - harnessing the power of customer data to orchestrate cross-channel messaging that delivers exceptional customer experiences.

For questions about personalization, feel free to contact Niels at

[Niels.Kolijn@dotdigital.com](mailto:Niels.Kolijn@dotdigital.com)



SERVICE & LOYALTY

# LOYALTY & BONUS PROGRAMS

**The competition is only a mouse click away.** That's why online shops should do everything they can to bind customers to their own company. Loyalty programs that offer real added value strengthen customer relationships.

Programs with minimum sales volumes as a condition of access and increasingly attractive benefits, for example, fulfill a status function and strengthen customers' sense of belonging.

**An additional benefit:** Customers who opt for a bonus program usually not only make repeated purchases from the same company, but also add more products to their shopping cart, as a recent study by Magento confirms:

**More than half (54%) of respondents said that attractive loyalty programs encourage them to make more purchases from a company and spend more money in the process.**



## Customer Loyalty

SHOP NAME	Loyalty program	Payback	Newsletter	Displaying active codes in shop
1. ABOUT YOU	✗	✓	✓	✓
2. ASOS	✗	✗	✓	✓
3. Best Secret	✓ VIP CLUB	✗	✓	✗
4. bonprix	✗	✗	✓	✓
5. Breuninger	✓ Breuninger Card	✗	✓	✗
6. C&A	✗	✓	✓	✗
7. engelhorn	✓ engelhorn Card	✗	✓	✗
8. ESPRIT	✓ ESPRIT Friends	✗	✓	✓
9. HAPPYsize	✗	✓	✓	✓
10. H&M	✓ H&M Member	✗	✓	✗
11. Lands' End	✗	✓	✓	✓
12. Peek & Cloppenburg	✗	✗	✓	✗
13. PETER HAHN	✗	✗	✓	✓
14. SHEIN	✓ SHEIN POINTS	✗	✓	✓
15. s.Oliver	✓ s.Oliver Card	✗	✓	✗
16. Tommy Hilfiger	✓ Hilfiger Club	✗	✓	✗
17. Walbusch	✗	✗	✓	✗
18. WITT WEIDEN	✗	✗	✓	✗
19. Zalando	✓ Zalando Plus	✗	✓	✗
20. ZARA	✗	✗	✓	✗

**ONLY 8/20 SHOPS** have an active discount code as an ad in their shop.

For example, if a certain amount is missing to reach a reward, the customer is motivated to add another product to the shopping cart.

We wanted to know what offers are used in the fashion world to increase customer loyalty. Therefore, we looked at whether and which loyalty programs or exclusive offers are offered by the shops. In addition, we paid attention to whether there was an active discount code at the time of the research, which is advertised directly in the shop.



**Pleasing:** Every shop offers a newsletter

Newsletters are consciously advertised by the customer and are an established tool for increasing sales and customer loyalty - all the more pleasing that this marketing tool has arrived in all shops. <sup>2</sup>



We were particularly impressed by s.Oliver's implementation. The shop playfully encourages customers to redeem their winnings directly with a wheel of fortune.

Sources:  
 1) Verbraucherpräferenzen beim E-Commerce 2020, Magento Commerce  
 2) Commerce-Magazine

SERVICE & LOYALTY

# LOYALTY & BONUS PROGRAMS

On the other hand, we noticed that less than half of the retailers offer loyalty or points programs. Especially in the fashion industry, which thrives on repeated purchases at regular intervals, this is a potential for customer loyalty that remains untapped by some shops.

Nevertheless, we also saw many positive examples in the individual shops.

**H&M**, for example, offers an H&M Member program. This includes exclusive benefits, such as **pay later, discount codes, collect and redeem loyalty points, and participation in competitions.**

**Zalando** offers **Zalando Plus**, a subscription model that offers shopping benefits as well as personal benefits, such as faster delivery and a personal styling advisor.



Breuninger provides useful incentives with an exclusive shopping card, complete with payment function - we like!



The example of **H&M Member** shows how a points program can be sensibly set up for its customers.

## ONLY 9/20 SHOPS

offer loyalty or points programs

# SUSTAINABILITY AND SLOW FASHION

## GREEN WASHING OR REAL CHANGE?



Sustainability as part of the brand DNA - often referred to as "slow fashion" in the fashion industry - is no longer an exception and is becoming increasingly important to consumers

This includes not only fashion made from organic and recycled materials, but also used clothing. The principle of throwing away and "buying new" is currently experiencing a strong countermovement.

### SLOW FASHION - WHAT DOES IT ACTUALLY MEAN?

Slow fashion describes the change to more responsibility and respect for people and the environment and a changed awareness of clothing, its origin and one's own consumer behavior.

We therefore wanted to clarify the following questions for our report in relation to sustainability and slow fashion in this chapter

**In short: the deceleration in the fashion industry.**

- What **packaging** is used for shipping?
- Is there a sustainable product range?
- Is there a **sustainability filter** in the shop?
- Are there **offset programs** to compensate for shipping?
- What about the **topic of re-commerce**? Are there any second-hand or recycling initiatives?

## SUSTAINABILITY AND SLOW FASHION PACKAGING

Packaging is the first point of contact when the long-awaited, ordered garment finally arrives. Here, in particular, consumer awareness is very high:

 **77%**


















Of users find that fashion shops often use too much packaging material.

 **81%**


Of users wish that the packaging material for online purchases was completely recyclable.

Therefore, we paid attention to three major aspects regarding product packaging:

- Which packaging material is used and is the size ratio of product to packaging correct?
- Is filling material used?
- Is the package self-adhesive or do you need tape for the return?

Shop	Packaging material	Filling material	Self-adhesive package (returns)	
1. 		none	✓	😊 3/3
2. 		none	✓	
3. 		none	✓	
4. 		none	✓	
5. 		none	✓	
6. 		none	✓	
7. 		none	✓	
8. 		none	✓	
9. 		none	✓	
10. 		none	✓	

Shop	Packaging material	Filling material	Self-adhesive package (returns)	
11. 		none	✗	😊 2/3
12. 		none	✗	
13. 		none	✗	😐 1.5/3
14. 		none	✗	
15. 		none	✗	😞 1/3
16. 		✓	✗	
17. 		none	✗	
18. 		none	✗	
19. 		none	✗	
20. 		none	✗	

-  Paper bag / box
-  Box too large
-  Plastic (recyclable 80%)
-  Plastic

**19/20 SHOPS** have dispensed with filler material in their packaging.

Only half of the shops use self-adhesive packaging solutions.

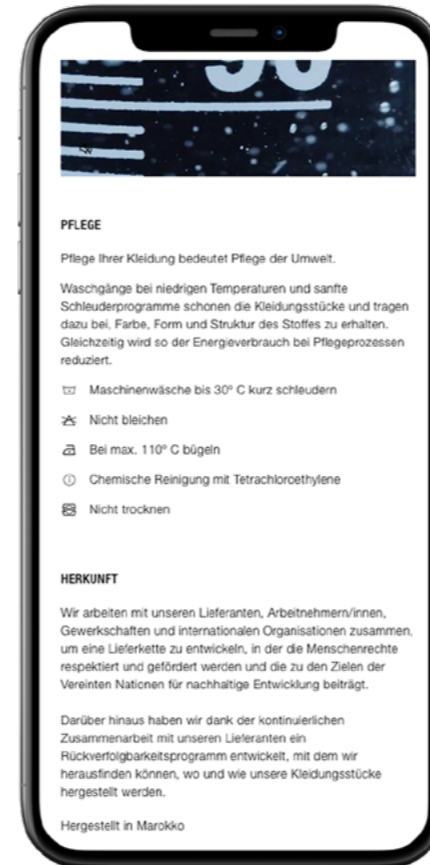
We find that even this seemingly small thing makes a lot of difference! On the one hand, packaging material is saved, but above all, the return process is also made easier for the customer, as the package can be closed with just one flick.



## SUSTAINABILITY AND SLOW FASHION TRANSPARENCY & COMMUNICATION



Shop	Sustainable products filter available	Communication about sustainability	Details regarding origin and production	Communication about further use of returns	
1. H&M	✓	✓	✓	✓	😊 4/4
2. ABOUT YOU	✓	✓	✗	✓	😊 3/4
3. Zalando	✓	✓	✗	✓	
4. ZARA	✓	✓	✓	✗	😐 2/4
5. ASOS	✓	✓	✗	✗	
6. bonprix	✓	✓	✗	✗	
7. Breuninger	✓	✓	✗	✗	
8. C&A	✓	✓	✗	✗	
9. engelhorn	✓	✓	✗	✗	
10. ESPRIT	✓	✓	✗	✗	
11. Lands' End	✓	✓	✗	✗	
12. s.Oliver	✓	✓	✗	✗	
13. Tommy Hilfiger	✓	✓	✗	✗	
14. WITT WEIDEN	✓	✓	✗	✗	😞 1/4
15. Best Secret	✓	✗	✗	✗	
16. Peek & Cloppenburg	✓	✗	✗	✗	😞 0/4
17. PETER HAHN	✗	✓	✗	✗	
18. SHEIN	✓	✗	✗	✗	
19. HAPPYsize	✗	✗	✗	✗	😞 0/4
20. Walbusch	✗	✗	✗	✗	



Zara shows Information on sustainability on the PDP as well as information on the country of origin.



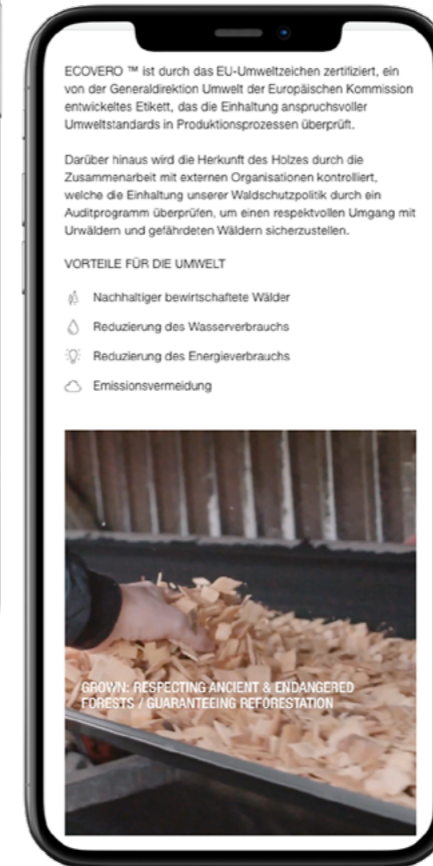
### AT 17/20 SHOPS

you can filter directly for more sustainable clothes on the category page.



### ONLY 2 SHOPS

indicate on the PDP where and under what conditions the garment was produced.



To avoid being confronted with greenwashing accusations, companies should transparently show their customers that they are aware of their responsibility and take concrete measures to protect the environment and report on them.

In this context, we wanted to know:

- Can products be filtered by sustainable production?
- Is information on the country of origin and production conditions provided on the detail page of a product?
- Is sustainability anchored in the company guidelines (certificates, news, etc.)?
- Is information provided on how to handle returns?

SUSTAINABILITY AND SLOW FASHION  
**DELIVERY AND COMPENSATION**

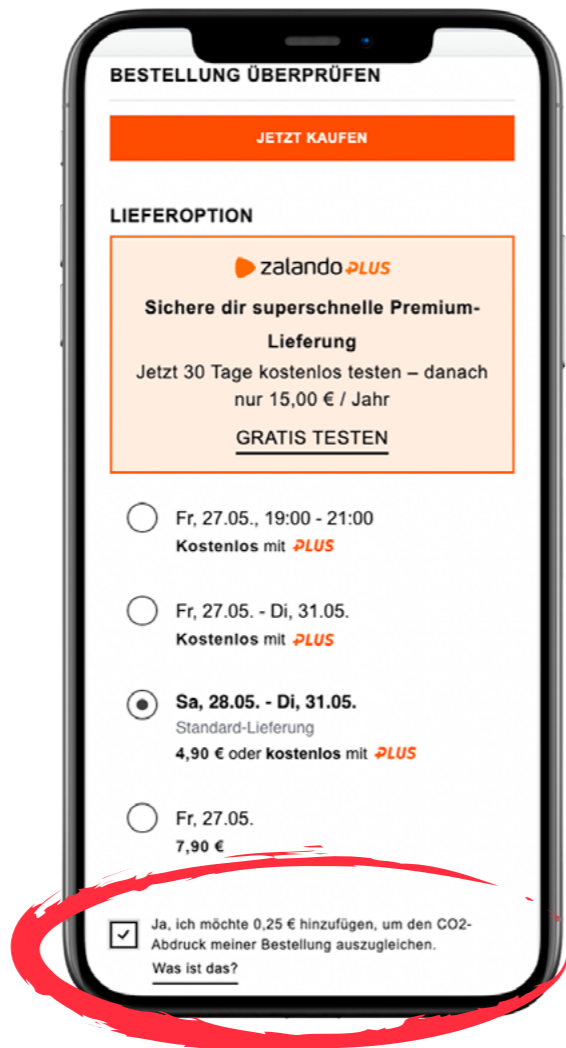
The biggest emissions drivers in e-commerce are undoubtedly transport and distribution, as e-commerce companies consist of a complex logistics and delivery network, which is naturally reflected in the company's carbon footprint.

CO2 offsetting is a good way of compensating for the unfortunately unavoidable CO2 footprint of one's own orders through offsetting programs in the form of climate protection projects.

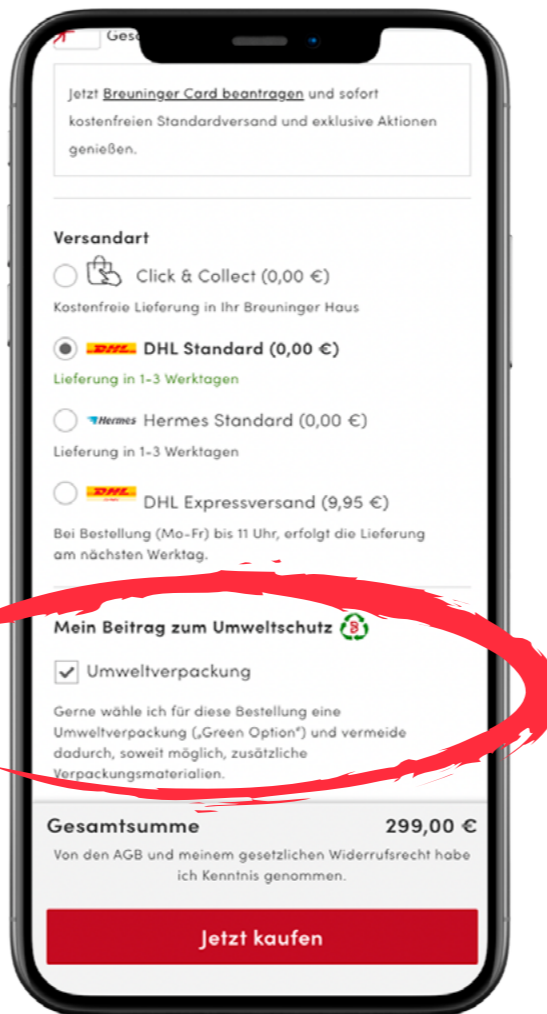


**ONLY 2 SHOPS**  
 offer ecological compensation for shipping.

5) Planetty



At Zalando, you can offset the CO2 footprint of your own order for an additional €0.25.



Breuninger relies on extra environmental packaging that can be selected at checkout.



SUSTAINABILITY AND SLOW FASHION

# SUSTAINABLE FASHION CONCEPTS: LEND, SHARE, SELL AGAIN



In addition to sustainably produced clothing, sustainable fashion concepts such as secondhand or recycled clothing are particularly in demand:

**Second hand** is drawing ever wider circles: Increasing sustainability awareness, affordable prices, availability & uniqueness are the reasons for this. Above all, it shows that low prices and sustainability do not have to be mutually exclusive opposites.

**Sharing economy** - a concept that is becoming increasingly popular in the fashion world, especially among the younger target group, and for many represents a real alternative to buying clothes. This includes, for example, the lending of occasion-related clothing such as suits or wedding dresses, but also designer pieces and accessories.

Another welcome development: **circular economy or recycling** of raw materials from used clothing. Many companies are already committed to initiatives & research projects to develop technologies for this and bring them to market.

**Bonprix**, for example, convinced us with their concept "Creating space with heart". Here you can simply donate worn clothing. For each clothing donation sent, you then receive an email with a vote that you can use to support a charitable organization.

**ONLY 12/20 SHOPS** offer or support sustainable fashion concepts.

## Are sustainable fashion concepts offered?



What happens to articles when they are no longer worn? Unfortunately, too many garments land in the trash. Sustainable fashion concepts like second hand shopping, recycling or the promotion of sharing economies are steps in the right direction.



### THE ABSOLUTE BEST PRACTICE HERE IS ZALANDO

Zalando contributes to a circular economy in the fashion industry with "Zircle".

**Fast Fashion:** Anyone who buys the latest fashion trends, wears them for only a short time and then disposes of them again is not living sustainably and produces a lot of waste. Zalando Zircle wants to change this consumer behavior. The aim is to reduce waste and pollution from clothing by creating a cycle in the fashion world. Users have the opportunity to sell their used clothes that they no longer want to wear directly to Zalando or to a community. All you have to do is photograph selected pieces and a selling price is displayed directly.



## HIGHLIGHTS



Sustainability filters in the shop are standard and established in almost all shops.



In-depth and transparent information about sustainable production conditions is missing on the product detail pages, with few exceptions.



Sustainability is the new normal and is also becoming increasingly relevant in online shopping. Holistic solutions are needed here!

# TECHNOLOGY & INNOVATION

It was also important for us to take a close look at the shops in terms of technological progress and innovations. In its annual industry report, IFH Cologne highlights e-commerce trends for shop operators.

A representative survey revealed:

57%

**OF ONLINE SHOPPERS LIKE TO TRY OUT NEW TECHNOLOGIES THAT SIMPLIFY ONLINE SHOPPING.**

51%

**EVEN PAY ATTENTION TO THE FACT THAT SPECIAL SERVICES ARE OFFERED.**

65%

**THINK IT IS IMPORTANT FOR A SHOP TO OFFER A VARIETY OF SERVICES TO SUPPORT THE BUYING PROCESS.**

Given the intense competition between on-line shops, this is an opportunity for retailers to stand out. After all, good services make all the difference.

apps (PWA) used? Do the retailers have their own app in addition to the shops, and what features are offered? These and other exciting questions are answered in this chapter.

**In this context, we wanted to know:**

How fast and well do the shops work on different devices? Are progressive web



## TECHNOLOGIE & INNOVATION

# PERFORMANCE

In e-commerce, performance describes how quickly you can navigate between products and the ordering process. Here, the faster the pages load on desktop and especially mobile devices, the better the user experience.

Studies show that slow web shops lead to abandoned purchases, while fast performance contributes to larger shopping carts and loyal customers.

In addition, good webshop performance also has an influence on search engine rankings. For Google, it has become a fundamental factor. Investing in performance optimization therefore pays off several times over.

But how do you know whether performance is good or bad? To answer this question, Google published the so-called Core Web Vitals in June 2021, which measure the performance of a website in the form of three metrics - load time, interactivity and visual stability:

The Core Web Vitals analysis is free of charge and can be performed at any time with

<https://pagespeed.web.dev/>

### LCP

#### (LARGEST CONTENTFUL PAINT):

How long does a page take to load? The time from the click on the link to the visibility of the content on the monitor is measured.

### FID

#### (FIRST INPUT DELAY):

This is where you go a step further. How long does it take between the first user interaction on the website and the browser response to this interaction?

### CLS

#### (CUMULATIVE LAYOUT SHIFT):

What is the layout stability during loading?

If there are elements that show spontaneous changes in the layout during the loading process, this results in a high CLS score.

These metrics add up to an overall value, the **Lighthouse Performance Score**, which measures performance quality. This value ranges between 0 and 100. If we take the e-commerce giant Amazon (the e-commerce shop with the highest sales) as a reference, for example, this results in a performance score of 92 for desktop and 70 for mobile.

It should be noted that the key figures were evaluated separately on desktop and mobile devices, because smartphones usually have a weaker performance and this should be taken into account when optimizing for mobile. What we find particularly good: In addition to the performance metrics, Google's PageSpeed Insights also provides concrete recommenda-

tions on which technical aspects should be improved in terms of performance.

The scattering of the top 20 fashion shops is large: Especially on mobile devices, most shops lag significantly behind Google's performance expectations. As expected, desktop performance is less critical: Three quarters of retailers are rated at least passable or good. The following pages show the results in detail.

## HIGHLIGHTS



The desktop performance is in the acceptable range for the majority of the retailers.

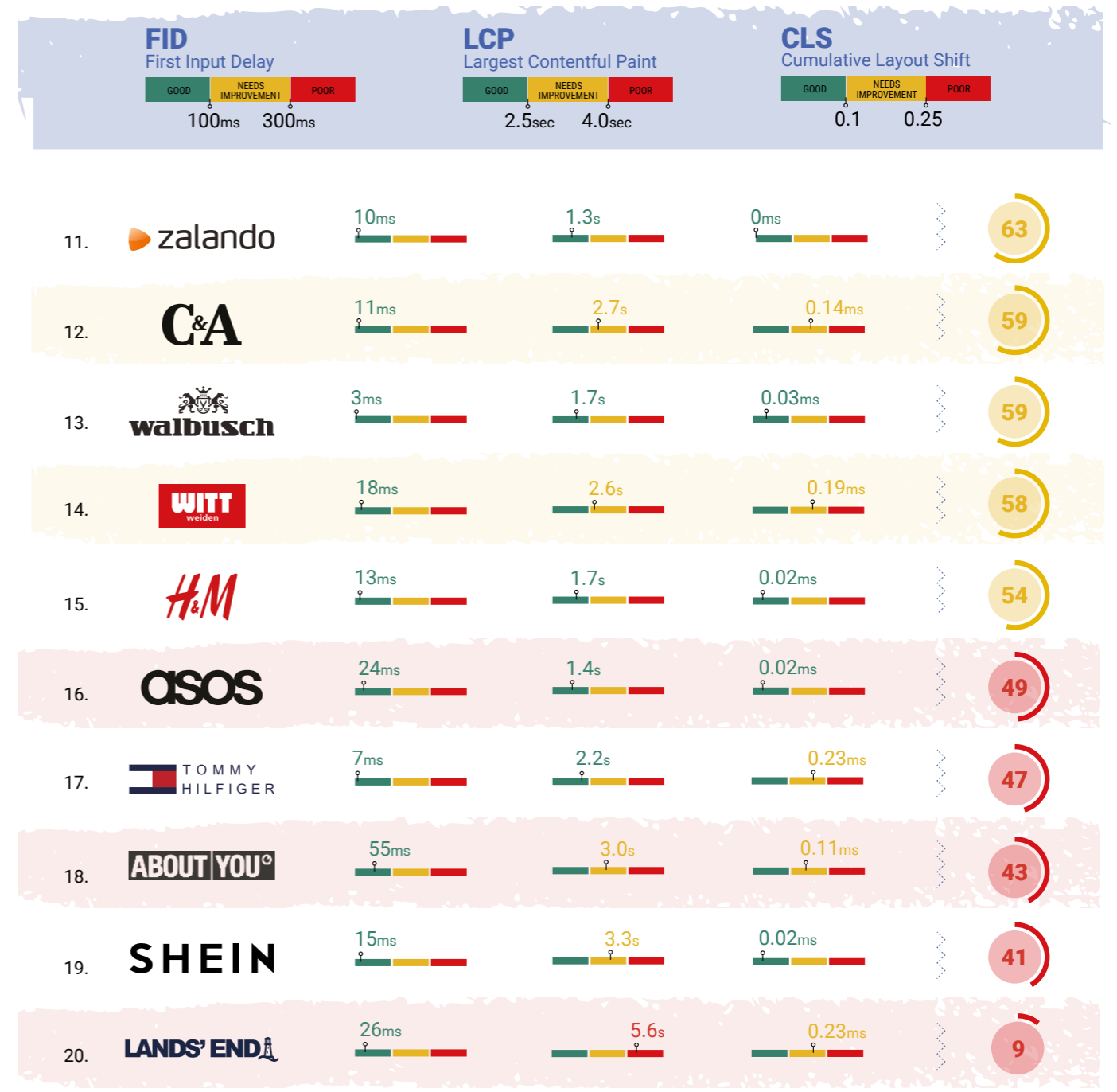


In terms of mobile performance, 18/20 shops are rated as "poor" by Google.



Anyone who achieves good performance across all end devices can gain significant competitive advantages on Google - especially thanks to the continuing increase in the proportion of mobile users.

## PERFORMANCE: DESKTOP



## PERFORMANCE: MOBILE



TECHNOLOGY AND INNOVATION  
**PWA**

Progressive Web Apps (PWA) are a current trend in e-commerce that is significantly changing mobile usage. A website with PWA capabilities has many features that were previously reserved for native apps.

**AMONG THEM:**

- The online shop can be installed on the smartphone.
- Certain functions and content can also be used offline.
- Push notifications for shipping or offers can be sent.

The advantage of PWAs is that no stand-alone iOS or Android app needs to be programmed. Any website can be extended with PWA functions and used as a mobile app with manageable costs for development and maintenance.

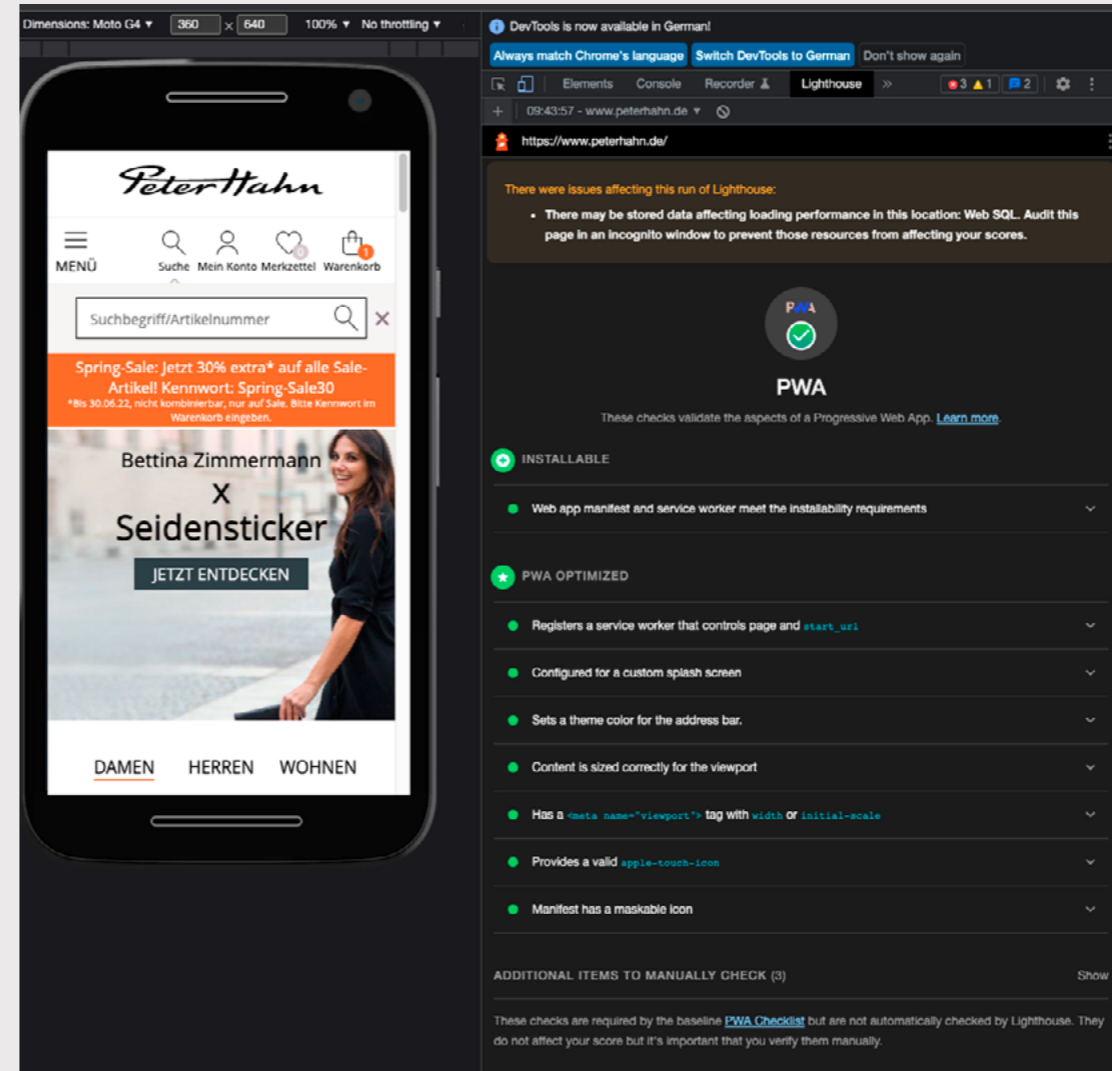
**Only 1 shop already fully uses PWA: Peter Hahn.**

**OTHER BENEFITS:**

A PWA can also access hardware such as the smartphone's camera, for example, to integrate a barcode scanner. In addition, the app does not have to go through a lengthy publishing process in the Google Play Shop or Apple App Shop, which may also be linked to commission payments in the long term. The installation is done directly on the respective website via the "Add-to-Home-screen" function - however, this feature is reserved for Apple users.

Under certain conditions, a PWA can even lead to better performance. For example, if the content of the following pages is preloaded in the background via the so-called service worker functionality. This feature is particularly valuable for mobile users in fashion shops, where many product detail pages are browsed one after the other.

But which shops are already using the potential of the PWA? For the analysis, we used Google's web analysis tool "Lighthouse".



**HIGHLIGHTS**



PWAs open up tremendous user benefits and can lead to better performance.



Three-quarters of the top 20 retailers are not yet using PWA features at all.



PWAs will fuel the mobile use of online shops even more in the future than they already do. Those who recognize these advantages and put them to use will also be ahead of the game in the mobile-heavy fashion industry.



TECHNOLOGY AND INNOVATION

APP & (OMNI-CHANNEL-) FEATURES

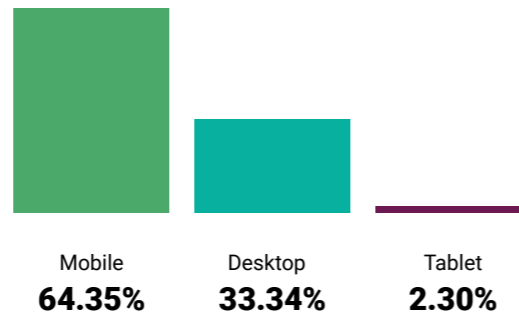
GIMMICK OR REAL ADDED VALUE?

We have deliberately placed the focus of our report on topics that have a direct influence on the user's shopping experience. Apps are somewhat of an exception here: Is the use of such technologies necessary to provide a good user experience? We think so - if they are used correctly.

APPS HAVE WELL ARRIVED IN FASHION

An own app can offer many advantages for retailers: For example, it is more quickly accessible and visible to users than a visit to the shop via the browser. In addition, functions that are difficult to implement in the browser are easier to implement in an app because they are designed for specific operating systems. These functions include, for example, customer loyalty programs, shopping aids or the integration of augmented reality.

TRAFFIC SHARE BY PLATFORM, JANUARY 2022



Source: Similarweb

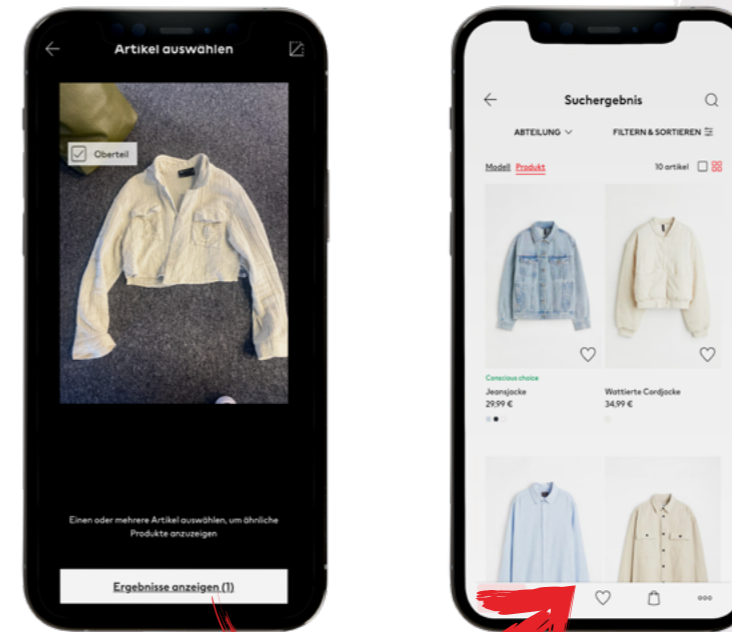
Most of the top 20 fashion shops in Germany already use the advantages of a native application. Only **Tommy Hilfiger, Land's End, Engelhorn and Walbusch** are out of line here. We hope that this share will continue to rise in the coming year. Because with the right features, an app can make a decisive contribution to customers identifying even more strongly with the company.

That's exactly why we also took a look at what special features the individual apps have to offer. **Are the apps used purely as shopping applications or do they really offer added value for the customer experience? Do the online shops with brick-and-mortar shops also offer omni-channel features?**

16 OUT OF 20 SHOPS

have their own app.

5/16 SHOPS offer the Visual Search function.



Simply take a screenshot or photo of a desired product, upload it to the app and get a similar item displayed - an absolute shopping convenience!



ASOS SHEIN

C&A H&M Breuninger

H&M, Breuninger, Asos, Shein & C&A are leading the way!

VISUAL SEARCH

Visual Search means the development of visual content with the help of AI. This trend is currently one of the most exciting in online retail - all the more pleasing that it has already found its way into the apps of fashion shops. Visual search helps to make product searches and product recommendations in online shops more intuitive. After all, image-based search hits ideally correspond pretty closely to the image that customers actually have in their heads.<sup>1</sup>

1) E-Commerce Magazine

TECHNOLOGY AND INNOVATION

APP & (OMNI-CHANNEL-) FEATURES

OMNI-CHANNEL-FEATURES

Omni-channel e-commerce is a sales approach that leverages multiple channels and provides customers with a consistent experience across all channels, whether brick-and-mortar or digital.

7 SHOPS

include omni-channel features in their APPs

Zalando, H&M, Breuninger, Esprit, C&A, s.Oliver und Zara are already using the potential of "Scan and Shop"!

While you're shopping in a brick-and-mortar shop and can no longer find the size you want, for example, you can scan the barcode using the app and see if the item is still available online!

The fashion label Zara particularly stood out. Here, you can switch to a so-called shop mode in the app. The function is intended to offer customers a whole new shopping experience:

CLICK & GO, CLICK & FIND, CLICK & TRY

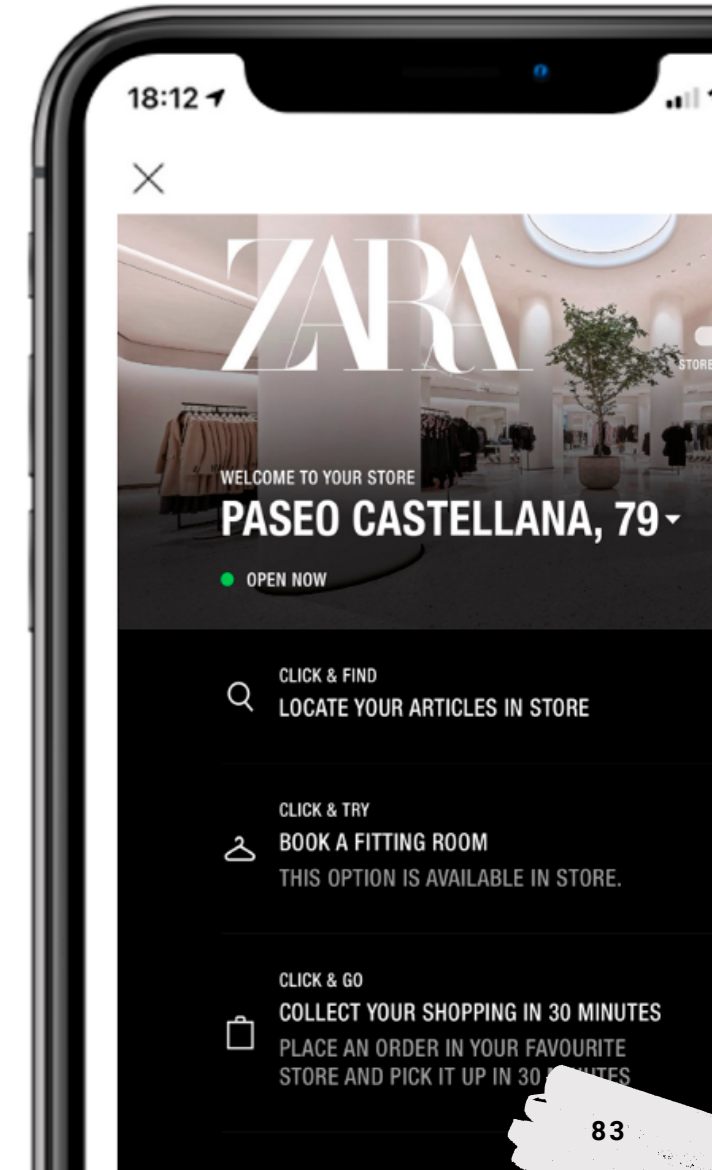
When entering a shop, the user receives a push message on the smartphone. Three options are then available:

With **Click & Go**, you can display in the app all the items that are available in the Zara shop of your choice at that time, these can also be paid for with the app and picked up in the shop after 120 minutes.

With **Click & Find**, customers can find out in which area of the shop their desired item is located. The floor plan of the floor is displayed for this purpose.

Last but not least, there is the **Click & Try** function: customers who are in the shop can now reserve a booth via app.

Shop fashion in the app - Zara as a pioneer on the German market. Mega concept - gladly more of it!



TECHNOLOGY AND INNOVATION

**SOCIAL COMMERCE & LIVE SHOPPING**

**"Live shopping, the new wonder weapon in e-commerce"**

as it is titled by Internet-world, offers many potentials for fashion retailers.

Social commerce has long since arrived in Asia. Providing social media channels not only as a source of inspiration, but also selling goods via them, is appealing to online shoppers. Live shopping is a particular highlight. Customers can watch live as goods are tried on or tested. This can be streamed directly in the shop.

We wanted to know how retailers are already using this trend. On which social media channels are the shops represented and is live shopping offered?

In general, it can be seen that shops have recognized the potential of social media and are adapting the shopping experience for their customers accordingly.



**ALL SHOPS ARE ACTIVE ON INSTAGRAM AND FACEBOOK**

**10/20 SHOPS**

already offer live shopping events for their customers.

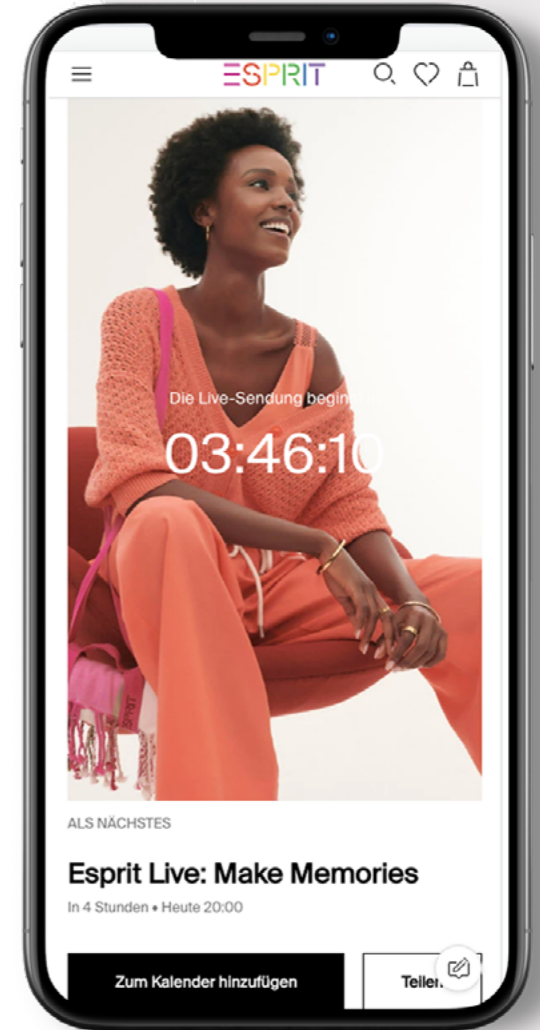
Use of **social media** for **marketing and sales**



ABOUT YOU  
SHEIN



ASOS  
Best Secret  
s.Oliver



Esprit shows the way: Live Shopping as a new shopping experience.

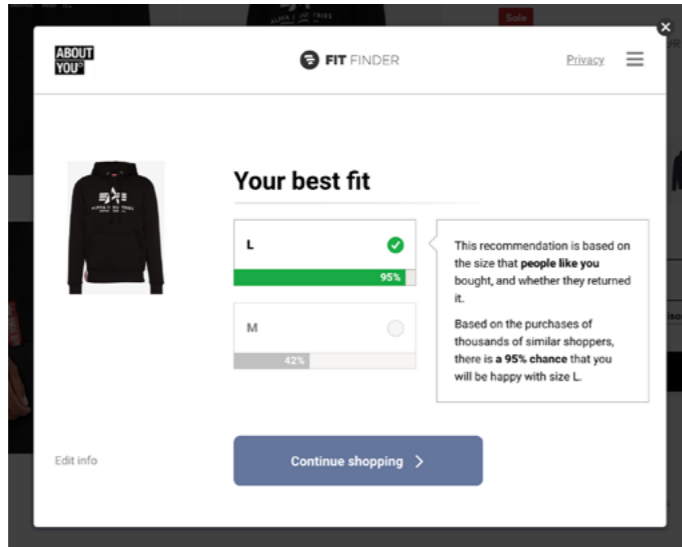
TECHNOLOGY AND INNOVATION

VIRTUAL SIZE ASSISTANTS

Size & fit is and remains one of the critical issues in digital fashion retail. Different brands classify their sizes, sometimes significantly differently, which is why users can hardly rely on a uniform size that "always fits" them. But bad purchases are frustrating for both sides: Returns cause effort and waiting time for the buyer, while on the retailer's side they eat up the usually already tight margin.

Since shipping and returns are often free in fashion retail, many customers order several sizes as a precautionary measure with the intention of keeping only the best-fitting item. This approach is neither sustainable nor economical. That is why many retailers are increasingly making efforts to make it easier for their customers to select the right size already in the shop.

Several approaches can lead to the goal here. Suppliers can increase the precision of their product de-



scriptions by providing detailed measurements of individual products. Likewise, the masses can make their contribution to a better estimation of the size of a garment: **by providing information on the fit in customer reviews**, reliable averages can be formed as to whether an item tends to run small, as expected or large.

11/20 MERCHANTS

use digital size advisors

In recent years, however, the solution approach of a digital size advisor, which is integrated into the shop in the form of a third-party service, has become even more prevalent. These services use standardized queries on height, weight, age and stature to determine the most suitable size of an individual item for a user. A particularly practical feature is that once this information has been entered, the user is usually shown the sizes determined on all other pages. The most frequently used service here is Fit Finder from the provider Fit Analytics, which is fully committed to optimizing size information.



Sizing assistants

✓ available  
✗ not available

SHOP NAME	Fit finder	Fit details in reviews	Product specific fit details
ASOS	✓	✗	✗
H&M	✗	✓	✗
ABOUT YOU	✓	✗	✗
ZARA	✓	✗	✗
bonprix	✗	✓	✗
Breuniger	✓	✗	✗
Lands' End	✓	✗	✗
ESPRIT	✓	✗	✗
HAPPYsize	✗	✓	✗
Peek & Cloppenburg	✓	✗	✗
PETER HAHN	✗	✓	✗
SHEIN	✗	✗	✓
sOliver	✓	✗	✗
Tommy Hilfiger	✓	✗	✗
Walbusch	✓	✗	✗
Engelhorn	✓	✗	✗
Zalando	✗	✗	✓
Best Secret	✗	✗	✗
Witt Weiden	✗	✗	✗
C&A	✗	✗	✗

😊 min. 1

☹ none

HIGHLIGHTS



17/20 retailers offer at least a virtual sizing consultation service.



Only 4 retailers so far utilize information about fit from customer reviews.



Virtual size advisors help retailers to make product selection easier for their customers - and thus contribute to better customer experience, higher cost efficiency and more sustainable trade.

TECHNOLOGY AND INNOVATION

**DATA PRIVACY AND CONSENT**

**Privacy remains a double-edged sword in e-commerce. Our partner usercentrics took a closer look at the current state of affairs for German fashion retailers in this guest article.**

Since the General Data Protection Regulation (GDPR) came into force in 2018, the issue of consent has become the focus of website operators. Consent refers to the agreement to the use of personal data, among other things for the purpose of analysis, advertising or personalization of offers.

In most cases, online retailers face a conflict of interest when it comes to the issue of consent: Do they want to exploit the full range of tailored (and thus effective) advertising offers and retargeting in order to achieve sales growth? Or should all activities only be designed in compliance with the applicable EU rules on data protection in order to act in a legally secure manner at all times? We wanted to find out in which direction the pendulum is swinging among fashion retailers in Germany...

To this end, our partner Usercentrics, the leading consent management platform in Europe, conducted an extensive scan to test the level of GDPR compliance among the top 20 fashion e-commerce websites in Germany. In this report, we outline the key findings and trends.

Due to the sensitivity of the topic, we will not disclose company-specific information, but rather reveal the general trends we see in the industry regarding compliance.

Three of the 20 retailers did not allow a scan due to technical circumstances. The data therefore relate to only 17 of the 20 retailers examined.

**48% OF UNNECESSARY COOKIES**

are sent without user consent

**THREE KEY FINDINGS**

- 14 out of 17 of the surveyed fashion retailers in Germany do not comply with the requirements of the GDPR, as they use at least one non-essential cookie before the Set consent of the user.
- 48% of unnecessary cookies are set without user consent.
- The biggest compliance issues relate to the use of video tools on the Websites.

**THREE MAIN TRENDS**

**1) The bigger the website, the more cookies and tracking technologies are used.**

This is not entirely surprising, as the biggest fashion brands in e-commerce also have the biggest domains (some with more than 10,000 pages). In addition, the large shops use both first-party and third-party cookies to

create a better user experience as well as greater personalization, ultimately generating more revenue.

**2) E-commerce companies are moving away from third-party cookies and towards first-party cookies.**

In general, there is a trend to build tracking away from third-party cookies and towards first-party cookies. The Cookiebot CMP scanner found 70% first-party cookies versus 30% third-party cookies on

all websites examined. With Google's plans to discontinue the use of third-party cookies in its Chrome browser by the end of 2023, this trend toward greater use of first-party cookies underscores a general movement toward alternative tracking strategies based on first-party data.

On the other hand, this also makes it clear that tracking is not a practice associated with Third-party cookies is disappearing. Rather, the numbers show that the collection of non-essential data persists and will continue to require end-user consent regardless of the technology and collection method.

**AN AVERAGE OF 6278**

scanned pages per dealer

Guest article by Phillip Danielsen, Research Analyst at



TECHNOLOGY AND INNOVATION

DATA PRIVACY AND CONSENT

In other words, prior consent remains essential for compliance with the GDPR, regardless of the tracking technology used to collect and process personal data.

3) The most common compliance challenge relates to the implementation of video, statistics and marketing services.

The implementation of videos on websites of platforms such as YouTube and Vimeo sets third-party marketing cookies that collect and process personal data of users. According to the EU General Regulation, such cookies may only be activated if the end user has given his consent.

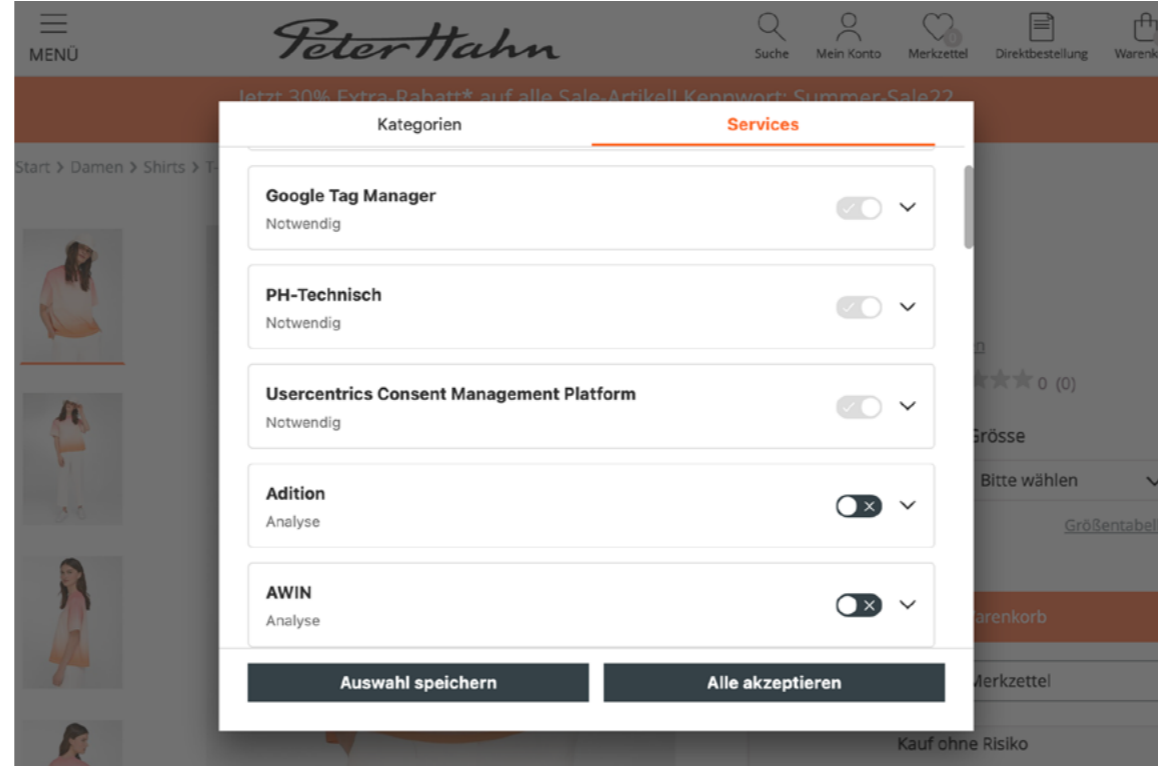
However, our scan analysis showed that one of the most common non-compliance issues on the main fashion e-commerce sites in Germany was the activation of video links that set third-party cookies without the end user's prior consent.

More awareness is needed to address the frequent non-compliance issues on e-commerce websites: Embedding videos from YouTube and Vimeo sets cookies and trackers. To be compliant, merchants must obtain end-user consent before playing relevant video content.

CONCLUSION

Usercentrics' scan analysis of the top 20 fashion shops in Germany shows that the industry is making efforts to comply with data protection - but there is still a long way to go before revenue and compliance targets are balanced. The legaltech market has evolved significantly over the last four years and solutions are available to enable companies to be GDPR compliant.

Still, each company must decide for itself whether it is ready to fully commit to data compliance and take compliance seriously.



Detailed: In Peter Hahn's shop, users can even break down their preferences to individual services.

62% MARKETING-COOKIES

were set without consent

More informationen about usercentrics



[www.usercentrics.com](http://www.usercentrics.com)

Phillip Danielsen works as a research analyst at Usercentrics. Usercentrics is a global market leader in the field of Consent Management Platforms (CMP). Usercentrics helps customers such as Daimler, ING Diba and Konica Minolta to comply with data protection regulations. The company is active in more than 100 countries, has more than 2000 resellers and processes more than 61 million user consents daily.

If you have any questions, you can reach Phillip at

[phillip.danielsen@usercentrics.com](mailto:phillip.danielsen@usercentrics.com)



## TECHNOLOGY AND INNOVATION OUTLOOK

### SHOPPING OF THE FUTURE WITH AUGMENTED REALITY

**Augmented reality (AR)** is a significant step in fashion e-commerce to make the shopping experience even easier and more intuitive for customers.

For online fashion retailers, high return rates are one of the biggest challenges. AR, for example, can help reduce this rate by enabling consumers to make more targeted purchases - an absolute game changer for online retailers and a crucial competitive advantage!

### HOW CAN AUGMENTED REALITY BE IMPLEMENTED IN PRACTICE?

**A use case from H&M shows: Virtual Fitting - the dressing room at home**

In the online shop, clothes are usually ordered in several sizes and colors. Why? The uncertainty as to whether it will look good on one's own body and really fit is often too great. H&M wants to remedy this with Virtual Fitting. This is a kind of digital changing room for the home that is set to change our shop-

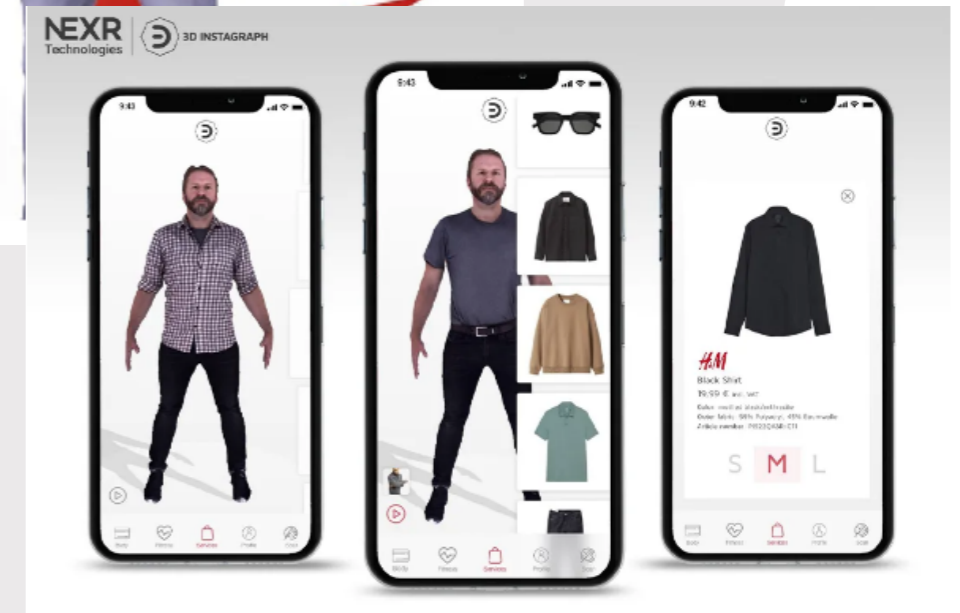
ping experience forever and could represent a real shopping revolution.

#### How does it work?

In selected shops, customers will be able to have themselves scanned in the future. Based on this, a personal avatar with the customer's own appearance and measurements will be created - a digital likeness. This avatar is then transferred to the app, which can then be used to try on the clothing virtually.

Finally, less return stress thanks to Virtual Fitting. Virtual Fitting could save shopping enthusiasts a lot of time and nerves in the future. After all, if you know what the clothes will look like on you before you even receive your order, you're more likely to keep them.

We are excited and hope for many more use cases in this area!



# CONCLUSION

## NOT A WHOLE LOT TO COMPLAIN, BUT LOADS TO IMPROVE!

The fashion industry is - judged by total revenue alone - **the largest e-commerce market in Germany** next to consumer electronics. That's why we had high expectations regarding smooth processes, highly optimized technical platforms and well thought out additional services. Were all of those expectations fulfilled? Of course not, that would have been boring!

Nonetheless, it is safe to say that the **level of quality among the top 20 fashion retailers in Germany is remarkable**. The logistical processes are reliable and fast, content commerce is widely adapted and the customer service of the merchants was available for 104 hours per week on average...

Still, this report shows that the e-commerce fashion landscape is **still far from absolute perfection**. The majority of merchants is **not yet capable of providing sensible personalized product offerings** in their shop of e-mail communication - even though high relevance of product recommendations is more important in fashion than in any other market.

Another vital topic in the global fashion landscape is the **sustainable management of resources and labour** in the production of garments. **The current level of communication and transparency provided by merchants is unfortunately the proverbial fig leaf**: few merchants make clear commitments to sustainability but rather provide brushed PR lingo.

**Our takeaway:** Merchants who can provide quality products, sensible personalization and authentic storytelling own the future! It's safe to say that the market is highly volatile and open to innovators!





# WHO IS BEHIND THE EXPERIENCE REPORT?

The e-commerce experience report is created and published by the e-commerce agency creativestyle. We are one of the leading full service e-commerce solution providers in Germany and help SMBs and market leaders with their growth in online commerce. As part of the Smile Group, we have a team of more than 2,000 dedicated experts, making us the leading provider for open source software and custom web development in Europe.

Our team has invested more than 200 hours into researching the German fashion industry. Why? Because we want to be the first to create a holistic benchmark for selling online in the German market.

## VERACITY OF DATA:

All results in this report were collected and interpreted with great care and attention to detail. The goal of this report is to provide a neutral summary, regardless of size, market position or used technology of a merchant. Still, we cannot exclude human error in the creation of this report.

We are happy to receive any hints, corrections or other feedback at [b.merl@creativestyle.de](mailto:b.merl@creativestyle.de).

## WE THANK OUR PARTNERS FOR CONTRIBUTING TO THIS REPORT:



**JAROMIR FOJCIK**

Our founder and CEO has brought this report to life and provided guidance and valuable insights, from the first draft to the final document.



**ADNAN KRZAVIC**

Our trainee Adnan was responsible for collecting and summarizing all data for this report. He is still flinching when someone says the word "fashion".



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**JULIA HECKL**

As our Content Marketing Manager, Julia provided the majority of content for this report. With a sharp eye for detail, she summarized the customer experience from A-Z.



**BENEDIKT MERL**

Benedikt is a Marketing Consultant at creativestyle. He was responsible for content direction, tying together our own research and the contributions by our partners.



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