

Fashion Ecommerce Trends Report

Trends in the purchasing behaviour of luxury and consumer fashion shoppers.



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SUMMARY

INTRODUCTION

Online retail has been a key growth area for fashion retailers over the past decade and, more recently, luxury brands have begun to find success online. Online retail now accounts for around 10% of all luxury fashion sales. Overall, 27% of all fashion sales now take place online.

With higher value products, the average luxury consumer is likely to make more considered purchases compared to consumer fashion. This is reflected in the fact that cart abandonment rates are higher for luxury fashion sites.

However, the online shopping behaviour of luxury and consumer fashion shoppers has a number of similarities, especially when we look at the demographics.

According to Bain & Company, Gen-Z & Millennial consumers (under 40s) make up 30% of luxury consumers, and are expected to account for 45% of the global luxury market worldwide.

This makes the average luxury fashion shopper more likely to use smartphones, and they approach luxury and consumer fashion purchasing with a similar mindset. They are online shoppers who may be less familiar with the luxury in-store experience.

In this report, we look at the current state of the online fashion market, some key stats and trends, as well as some useful strategies and best practices for all fashion ecommerce sites.

We'll also focus on the luxury fashion sector, and contrast it to the consumer fashion market, looking at some of the unique challenges luxury brands face when selling online.

Using data from more than 100 SaleCycle fashion clients, we can show how luxury and other fashion brands are performing compared to other sectors, differences in customer behaviour across mobile and desktop, as well as general market growth.

WHO WE ARE



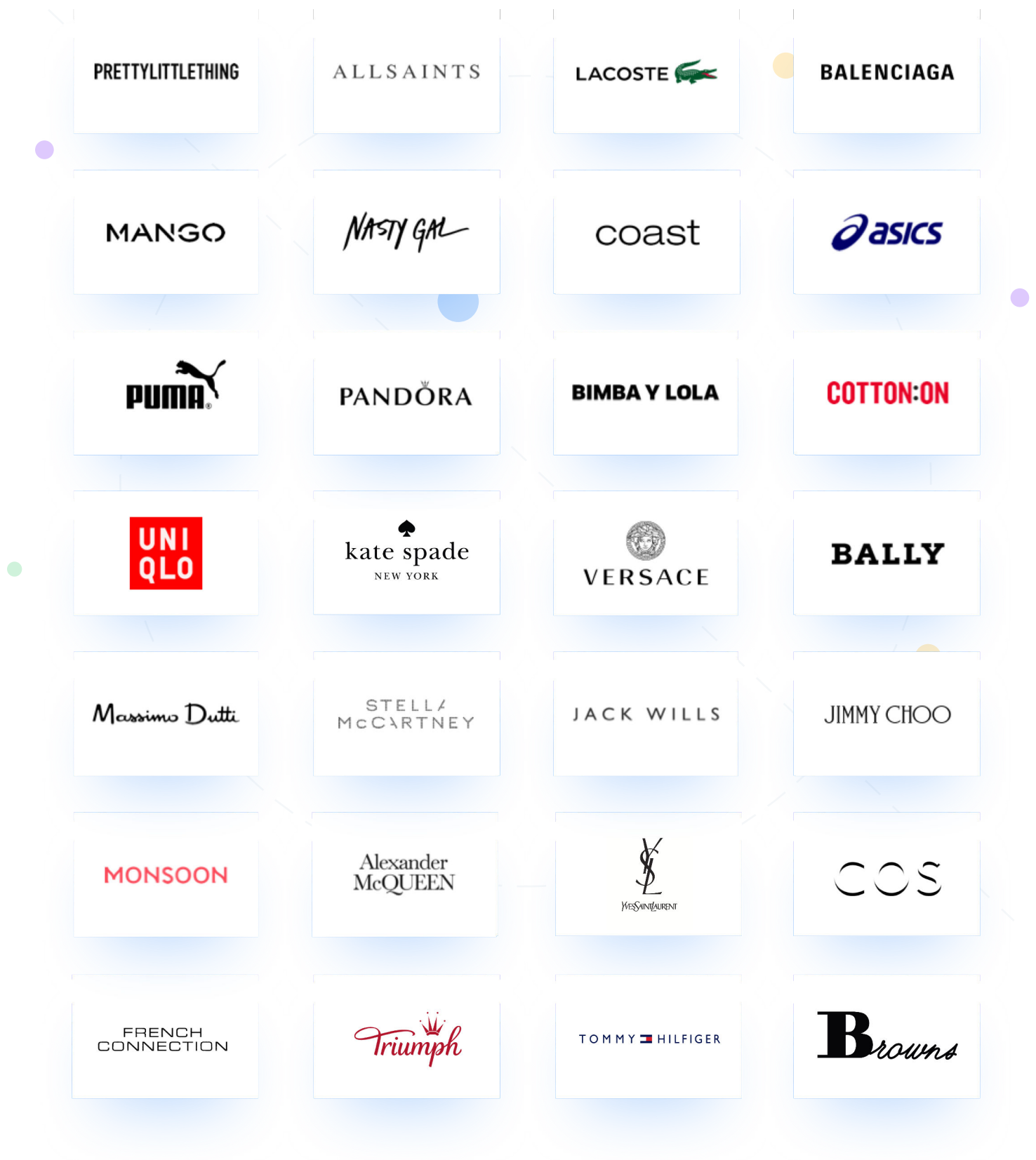
Our mission is to inspire, shape, and support the conversions that exist within every customer journey.

Dominic Edmunds - Founder & CEO at SaleCycle

From the moment someone lands on a website for the first time, through to following up purchases in style, we help our customers ensure their visitor's online journey is truly cyclical.



Trusted by the world's biggest and best retail and fashion brands



THE

STATE

OF

FASHION

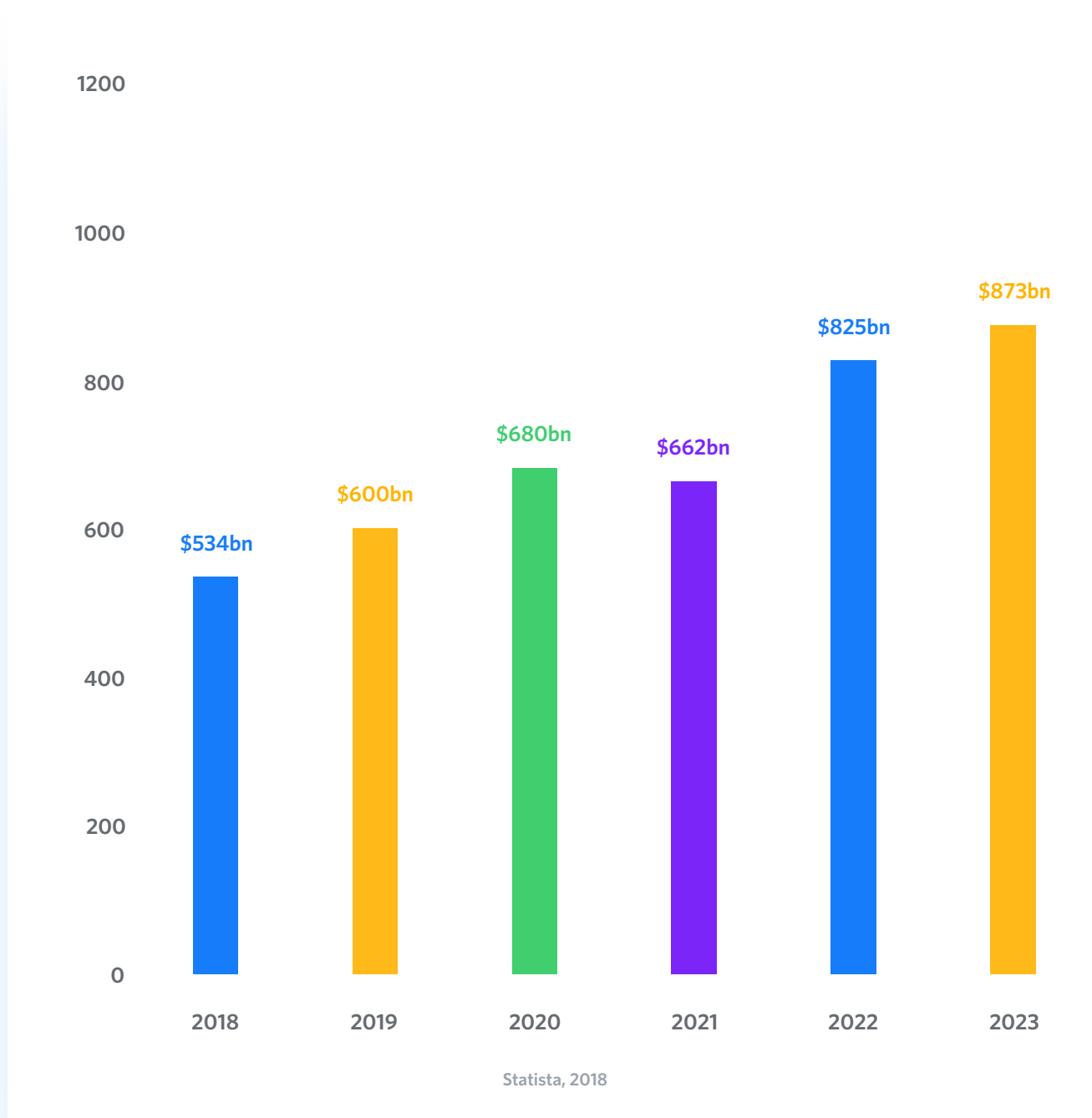
ECOMMERCE

ONLINE FASHION MARKET SIZE AND GROWTH

The global online fashion market was worth \$533 billion in 2018, and is predicted to grow to \$872bn by 2023.

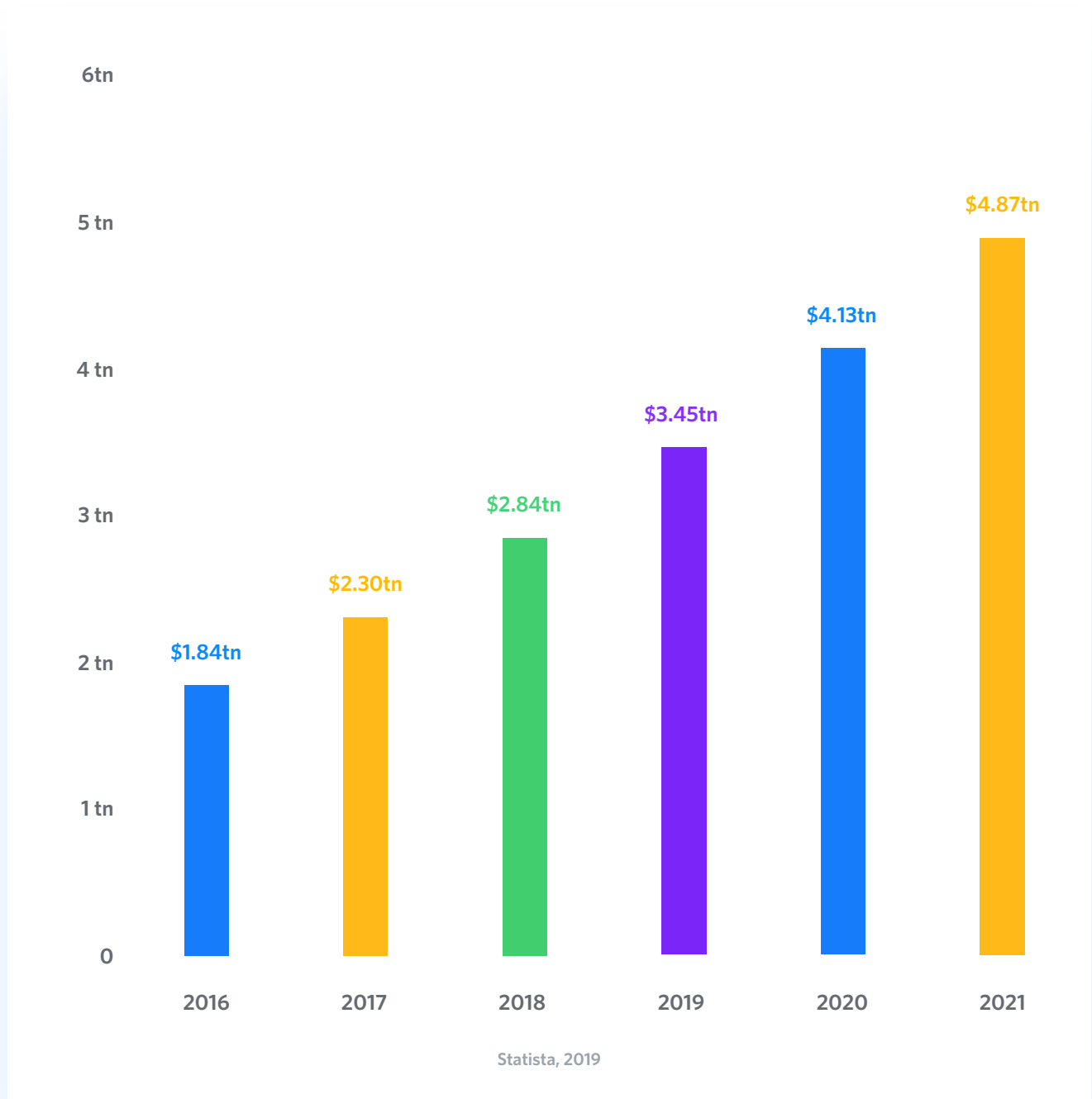
In 2018, apparel accounted for 65% of the online fashion market, followed by footwear (25%) and bags and accessories (10%). (Statista)

GLOBAL ONLINE FASHION SALES (2018-2023)



Total retail ecommerce sales worldwide reached \$2.84 trillion in 2018, and are predicted to almost double by 2021.

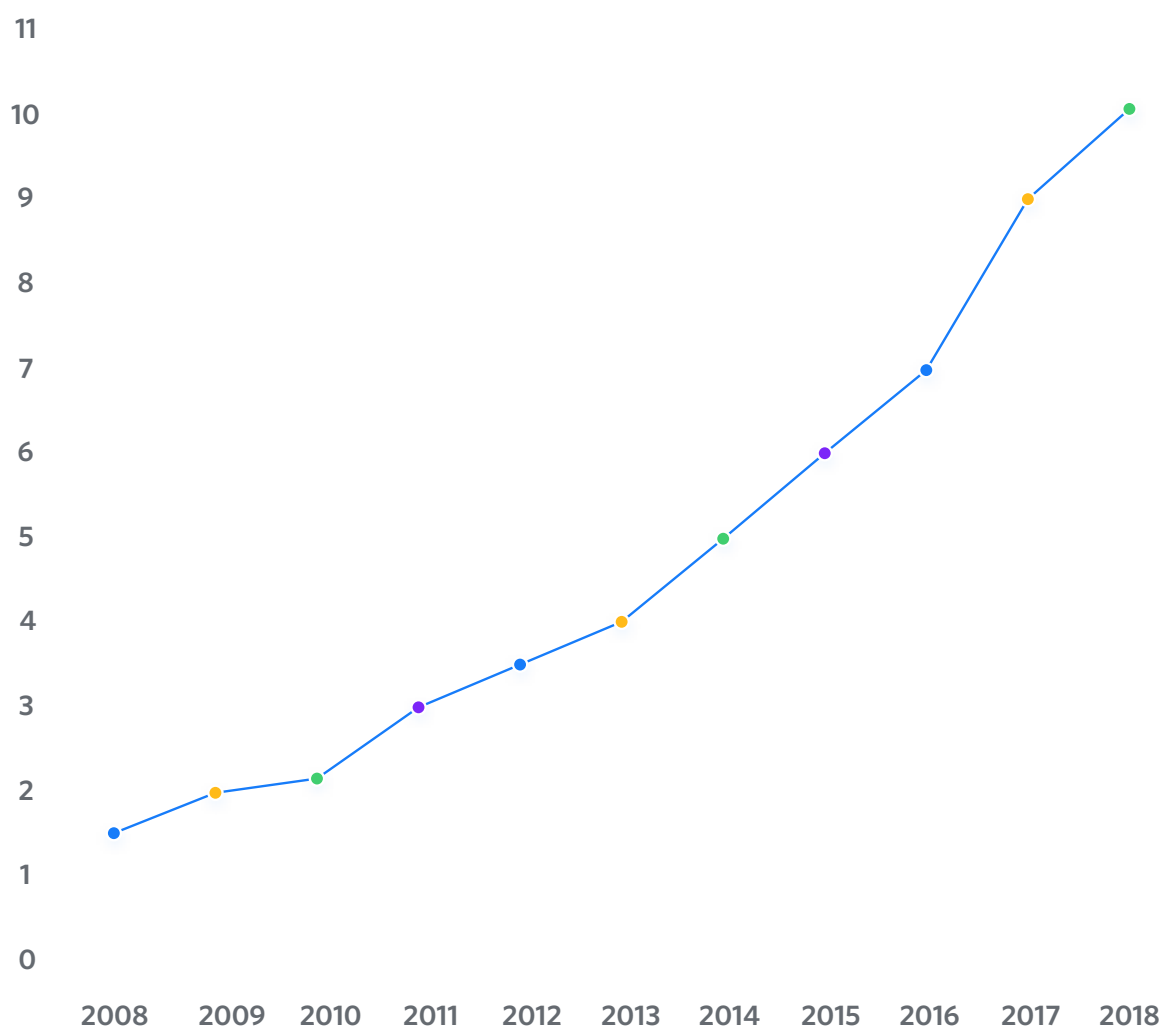
GLOBAL RETAIL ECOMMERCE SALES (2016-2021)



ONLINE LUXURY MARKET GROWTH

Online now accounts for 10% of the global personal luxury goods market, a category which encompasses clothing and footwear, as well as beauty products and jewellery. It has grown by at least 22% every year since 2008.

ONLINE SHARE OF LUXURY PERSONAL GOODS MARKET (2008-2018)



Statista, 2019

HOW DO WE SHOP ONLINE

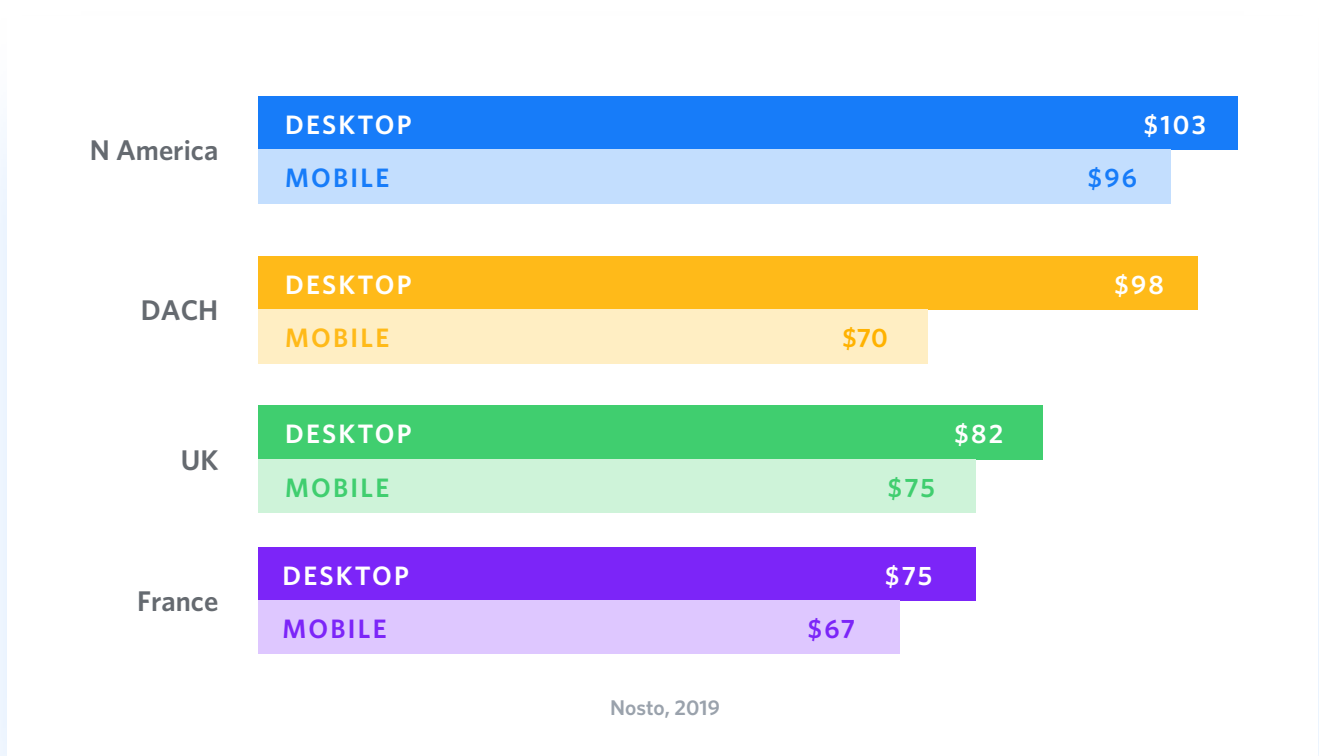
Mobile has been a key area of growth for online fashion, and many retailers have excelled in providing excellent experiences for mobile shoppers. However, there are still differences in customer behaviour when we compare mobile and desktop.

Average Order Values (AOV)

Average order values on fashion sites are generally higher for desktop users. In North America, desktop AOV is \$103, compared to \$96 on mobile. This reflects the comparative ease of browsing and purchasing on desktop, though the fact that mobile AOVs are relatively close to desktop also shows how well fashion retailers have adapted to mobile commerce.

For comparison, the average ecommerce AOV for all retail in North America is \$118.66 on desktop and \$77.71 on mobile.

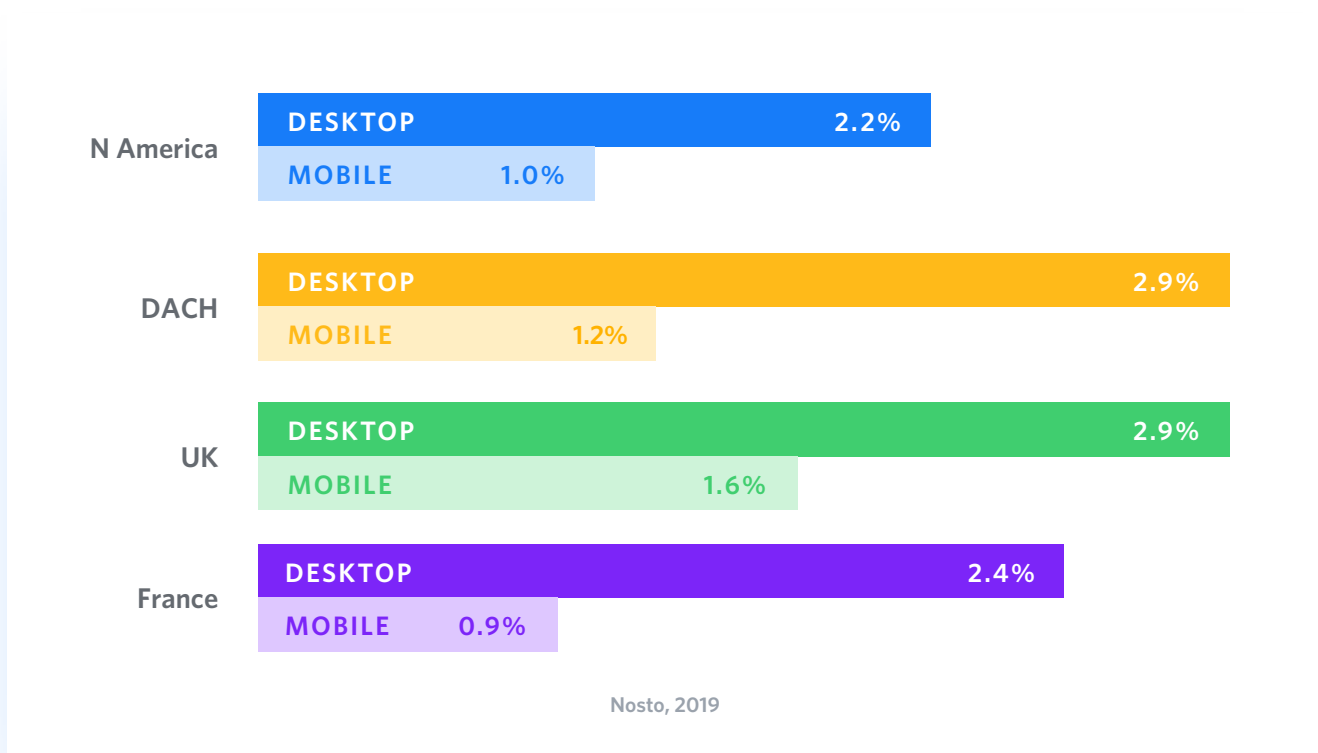
AVERAGE ORDER VALUES FOR FASHION ECOMMERCE: DESKTOP vs MOBILE



Conversion Rates (CR)

Fashion conversion rates are almost twice as high on desktop when compared to mobile. Mobile usability on fashion sites has improved greatly, but some customers are still reluctant to convert via mobile devices.

CONVERSION RATES FOR FASHION ECOMMERCE: DESKTOP vs MOBILE



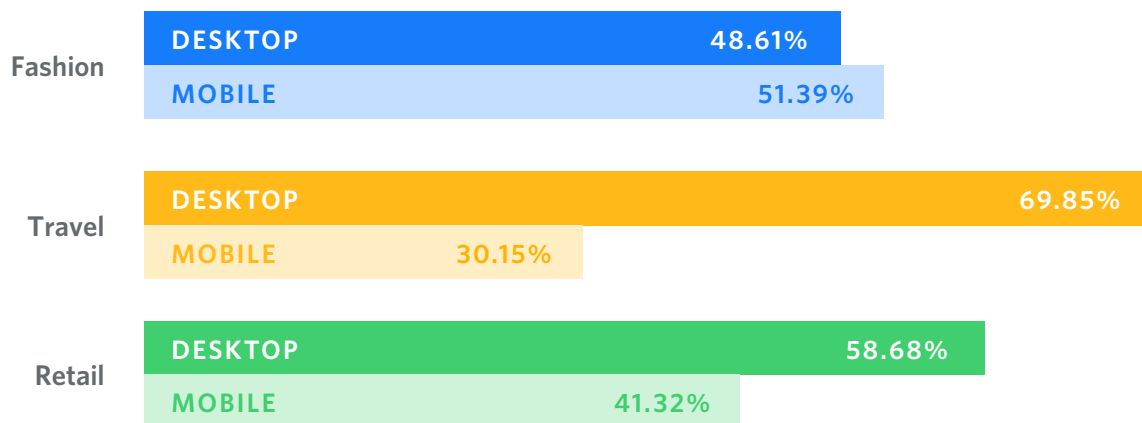
Abandonments and Sales

Fashion sites attract a greater proportion of sales on mobile. In fact, this is the only sector to attract the majority of its sales from mobile shoppers (51.39%).

The overall retail proportion of sales has grown and is now 41.32% while the proportion of travel sales completed on mobile reflects the relative complexity of the travel booking process.

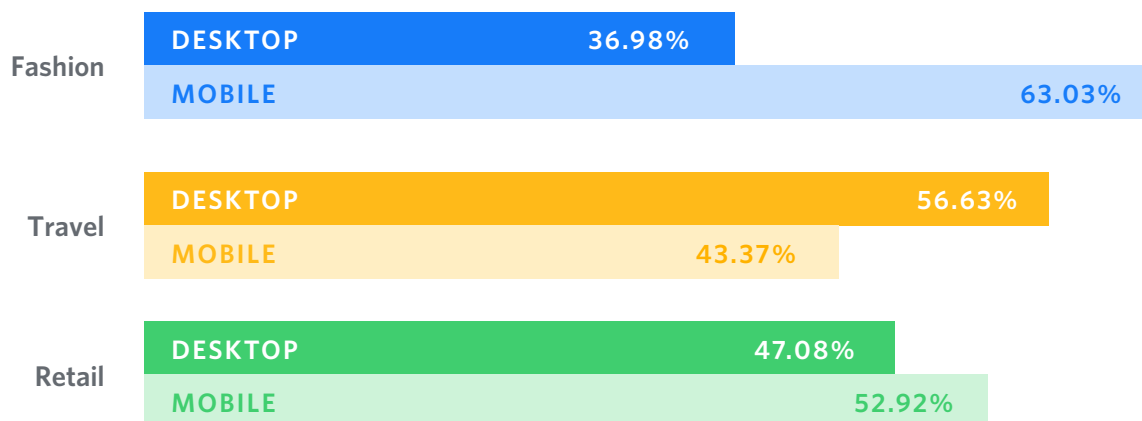
Fashion sites also have the highest proportion of abandonment on mobile (63.03%). Combined with the high proportion of sales, this suggests that many shoppers are switching channels before they complete a purchase.

PROPORTION OF DIRECT SALES: DESKTOP VS MOBILE



SaleCycle, 2019

PROPORTION OF ABANDONMENTS: DESKTOP VS MOBILE



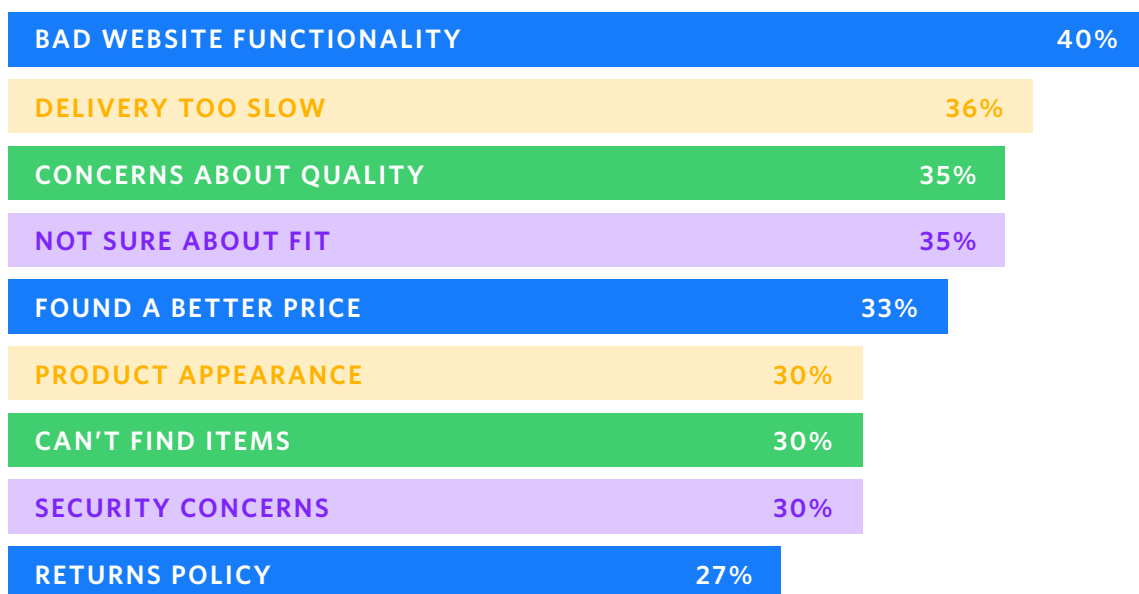
SaleCycle, 2019

The Issue of Online Abandonment

Many of the reasons for abandoning fashion purchases are similar to those of retail overall. Poor web usability, lack of fast delivery options, security concerns, and price comparison are issues for all online shoppers.

However, some challenges are unique to fashion retail - concerns about fit and predicting appearance are a big deal for fashion shoppers, and for this reason, they may be more concerned about returns policies.

WHY PEOPLE ABANDON CLOTHING PURCHASES ONLINE



Rakuten, 2019

LUXURY

VS

CONSUMER

FASHION

LUXURY vs CONSUMER FASHION

The dividing line between luxury and more general consumer fashion is generally thought to be price. While it's certainly true that luxury goods often differ greatly on price, the luxury offering is about more than this.

Luxury brands play on quality of product, materials and craftsmanship, as well as intangible assets such as history, timeless style, brand story and exclusivity.

For consumer fashion, and by this we mean more affordable apparel brands, it's more about a combination of trending styles, availability, and value. Quality is not unimportant, but there's a trade-off between quality and price.

These differences are reflected in the ways the respective types of fashion brands market their products. To take one example, live trends data is often used by retailers to show how popular products are, but for luxury brands looking to market around exclusivity, this is not a common tactic.

For luxury brands, there's a school of thought that marketing should be almost counter-intuitive in some cases (see [The Luxury Strategy](#) by Vincent Bastien and the [24 Laws of Anti-Marketing](#)).

For example, strategies like hard-selling and using celebrity endorsements have been frowned upon by some luxury brands.

This doesn't necessarily reflect the views and strategy of all luxury brands, but brands still need to retain that sense of exclusivity.

ABANDONMENT RATES: LUXURY VS CONSUMER FASHION

Fashion sites have some of the highest abandonment rates of any sector, at 87.78%, with luxury sites the highest, at 90.1%.



SaleCycle, 2019

The relatively high abandonment rates may reflect some of the unique challenges fashion retailers face around fitting. When customers are unable to try items on to find the best fit, they may be more hesitant about making a purchase.

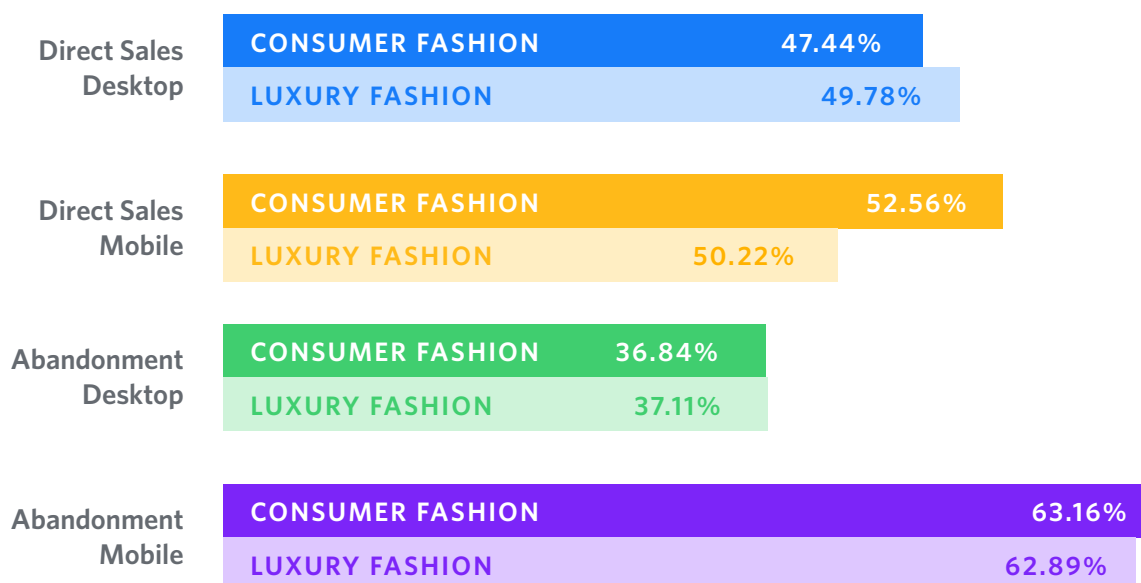
In the case of luxury retail, higher-value purchases, sometimes made with long-term investment in mind, can require greater time to consider, hence the higher abandonment rates.

ABANDONMENTS AND SALES BY DEVICE: LUXURY VS CONSUMER FASHION

Luxury and general fashion sites have a similar spread of sales and abandonments between desktop and mobile.

Consumer fashion sites drive a slightly higher proportion of sales to mobile, but the stats reflect the fact that fashion sites in general, whether luxury or mass market, work well for mobile shoppers.

DIRECT SALES DESKTOP vs MOBILE



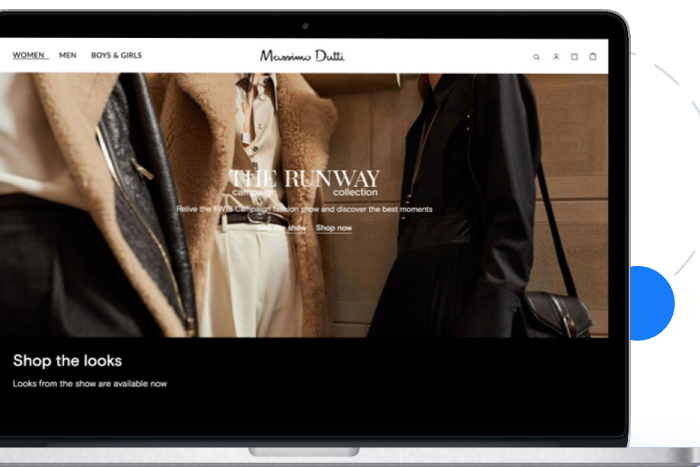
SaleCycle, 2019

ON-SITE BRANDING

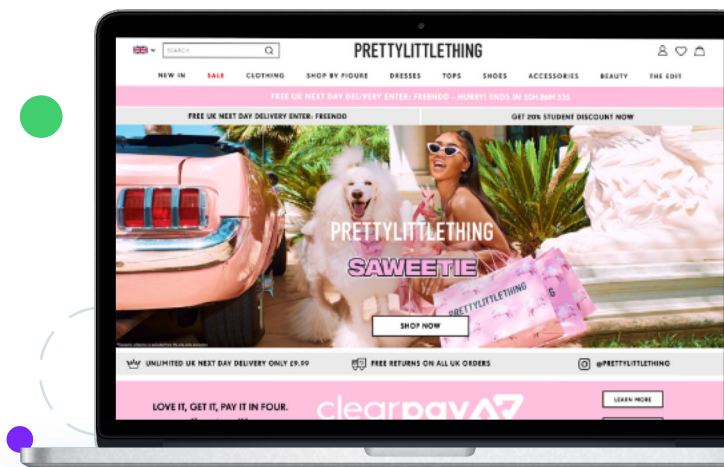
Fashion sites, in general, are very image-driven, but there is a difference in approach between luxury and consumer fashion which reflects brand values and the target customer.

The design style and imagery should make it clear to the visitor that they're on a luxury brand's site. This may be achieved through product photography, or by showcasing seasonal ranges, as Massimo Dutti does here.

LUXURY



CONSUMER



Overall, the look and feel of many luxury sites is more stripped-back, though it's still important that shoppers can find what they want and use the site easily.

A consumer fashion brand like PrettyLittleThing takes a contrasting approach, with promotions discounts displayed more prominently.

URGENCY MARKETING

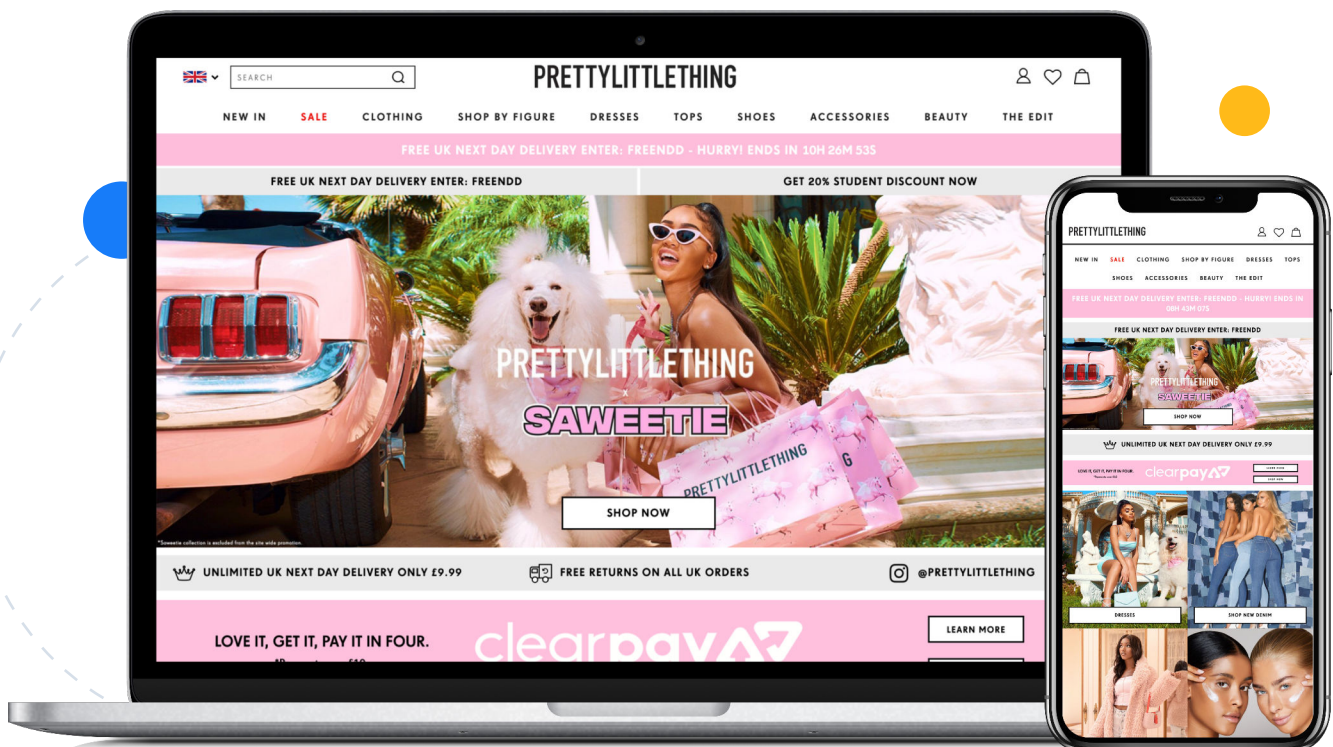
The use of conversion drivers which create urgency, such as countdown timers or buying trends data often differs between luxury and consumer brands.

Mainstream fashion retailers can be very trends driven, with a high turnover of products between seasons. This makes it more likely that they'll use sales or other short-term promotions to move on older stock to make way for new styles.

By contrast, sales and promotions are less common for luxury brands (older stock is often discounted through third parties if at all). Luxury brands tend to ignore big discounting events like Black Friday for this reason, while they are considered unmissable for most consumer brands.

Countdown timers are often used to encourage people to buy before the end of the promotional period, or to receive items more quickly.

By contrast, luxury brands use this tactic more for branding purposes, showing a countdown until the next fashion show, or the launch of a new collection.

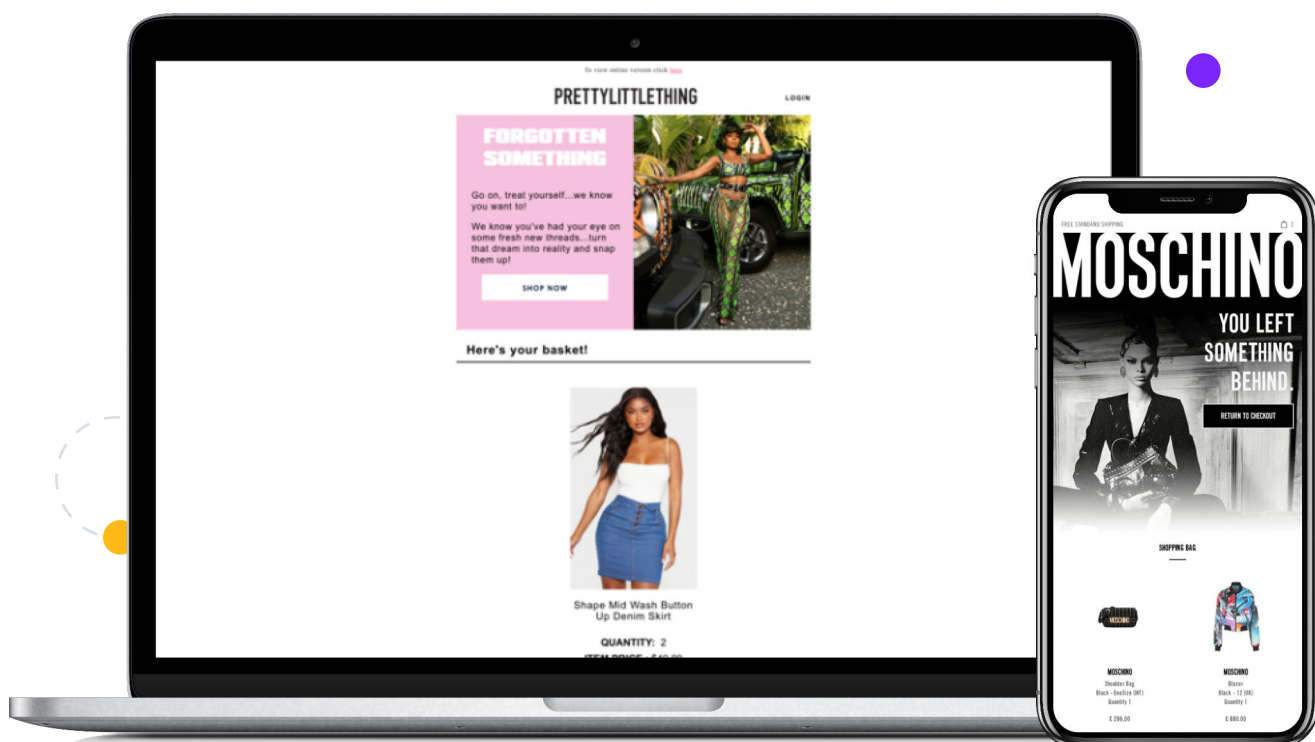


STYLE OF EMAIL MARKETING

The contrast between luxury and consumer fashion can often be seen in email design.

In general a cleaner, more minimalistic design is common for luxury brands, as seen in the email from Moschino.

By contrast, consumer fashion emails tend to be more colourful, with greater use of imagery as shown in the Prettylittlething email.

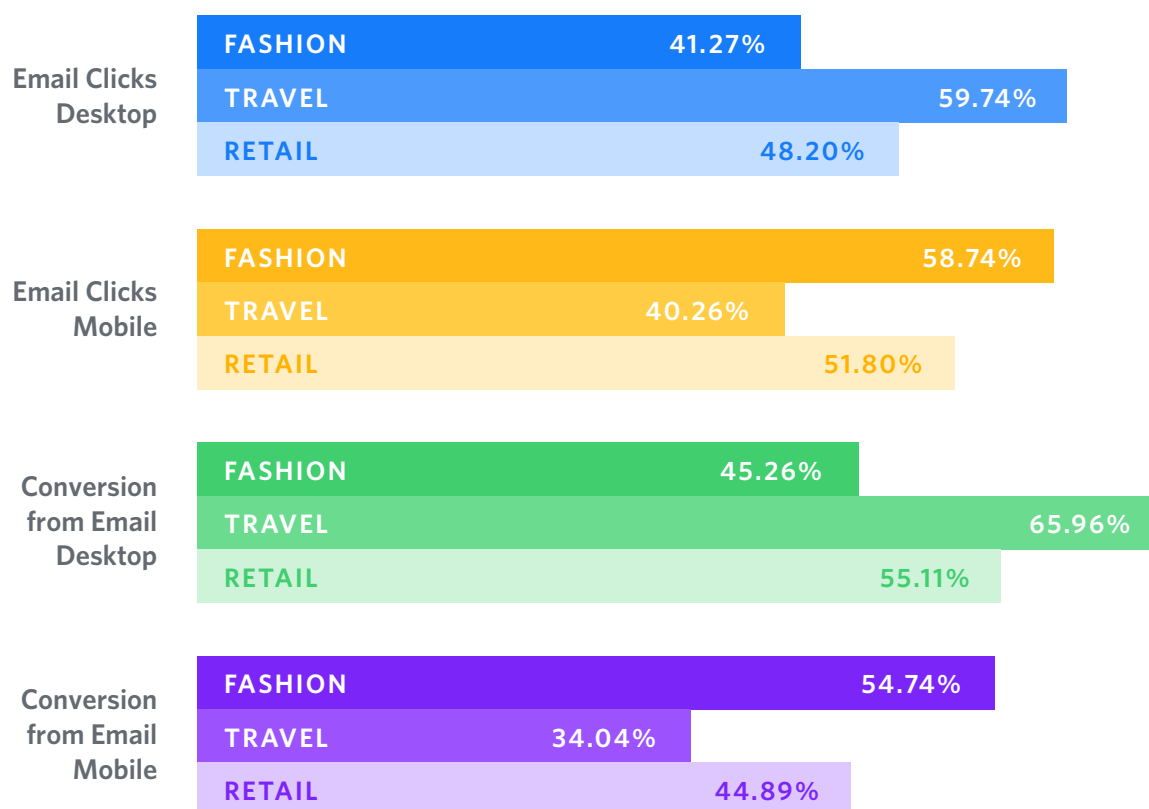


EMAIL PERFORMANCE

Fashion sites drive a greater number of mobile clicks and conversions from cart abandonment emails. For fashion sites, 58.74% of clicks and 54.74% of conversions from abandonment emails are generated on mobile.

Retail sites do manage to drive a majority of email clicks (51.80%) from mobile devices, but drive a lower proportion of conversions at 44.89%.

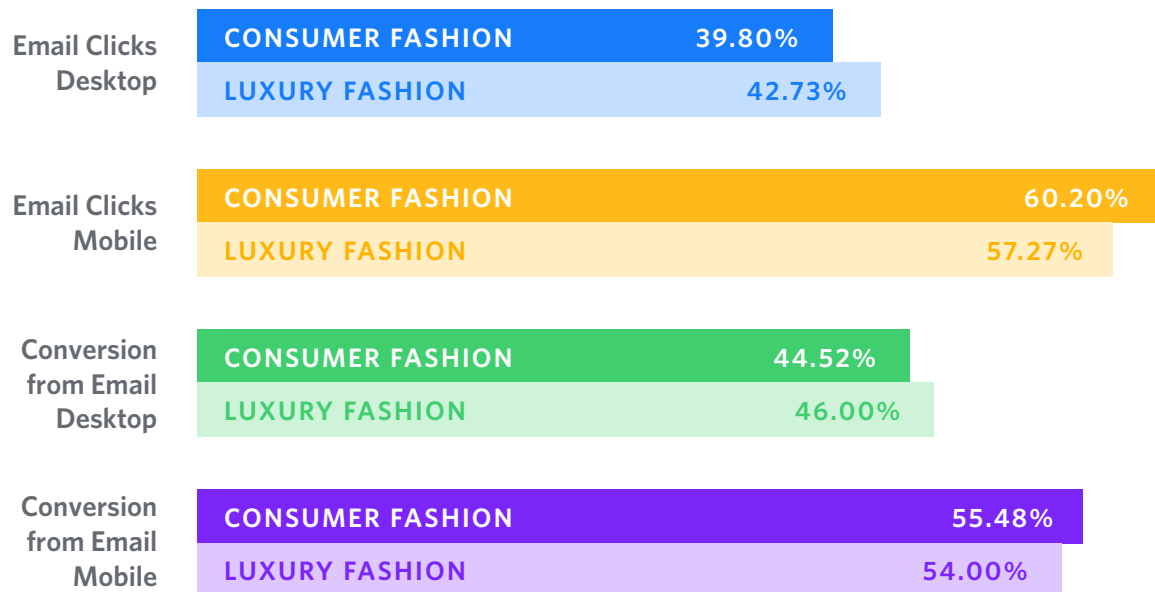
EMAIL CLICKS AND CONVERSION BY SECTOR



SaleCycle, 2019

Consumer fashion sites attract a slightly bigger proportion of email clicks and conversion from mobile.

EMAIL CLICKS AND CONVERSION LUXURY vs CONSUMER FASHION



SaleCycle, 2019

KEY

CHALLENGES

FOR

LUXURY

ECOMMERCE



KEY CHALLENGES FOR LUXURY ECOMMERCE

The internet has posed a problem in the past for luxury brands, for a number of reasons. Firstly, the always-on availability of ecommerce can be seen as contrary to the marketing aims of luxury brands.



Selling on the internet is strictly hype in luxury marketing. Many marketers seem to think that if you do not sell on the Internet, you are 'out'. Internet sales are extremely well adapted to fashion and premium, but not luxury.

Self-proclaimed 'web specialists' fault the luxury companies for not selling online, forgetting – or ignoring – that all the 'plusses' of digital trade (instantaneity, permanent change and actualization, availability, accessibility, price reductions, automation of service, crowdsourcing, etc.) are huge 'minuses' for luxury.

Vincent Bastien

The Luxury Strategy

This viewpoint was reflected in the reluctance of brands like Chanel to sell online (they began doing so in 2016) but most others see the huge potential for growth in ecommerce.

Online accounted for 10% of all sales of luxury products (including fashion) in 2018, a figure which is predicted to rise to 25% by 2025.

This growth and the tendency for younger demographics to shop online means that luxury brands will find it very difficult to ignore eCommerce. The challenge is how they can sell online and still convey that luxury feel.

HOW BRANDS DELIVER LUXURY ONLINE

Luxury brands have traditionally excelled with the in-store experience. Factors such as beautiful store design, great personal service and advice from store staff, and even little extras such as offering shoppers a glass of champagne all help to differentiate them from the 'average' retailer.

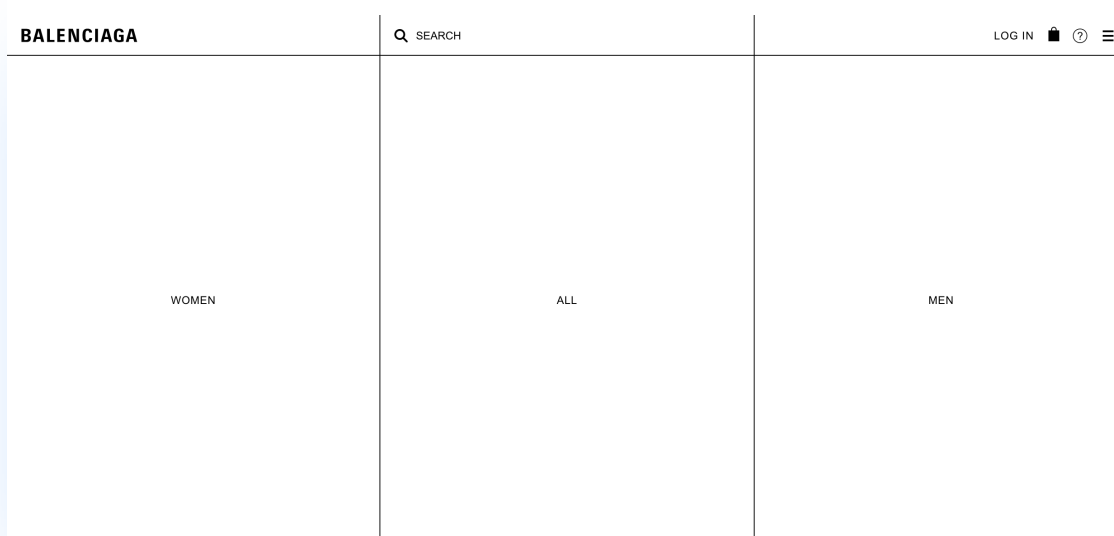
Online, it's different. While the sheer look and feel of a luxury store tells high street shoppers it's different from the average shop, eCommerce is a more level playing field in many ways.

Online, any brand can provide a great user experience if it works hard enough and understands its customers. This makes it harder for a luxury brand to stand out.

Site Design

Site design is one way to stand out, though the user experience should be kept in mind.

Balenciaga's clean design is one example of this - a site which, according to design agency Bureau Borsche is 'utterly brilliant in its simplicity and superbly user-friendly'.

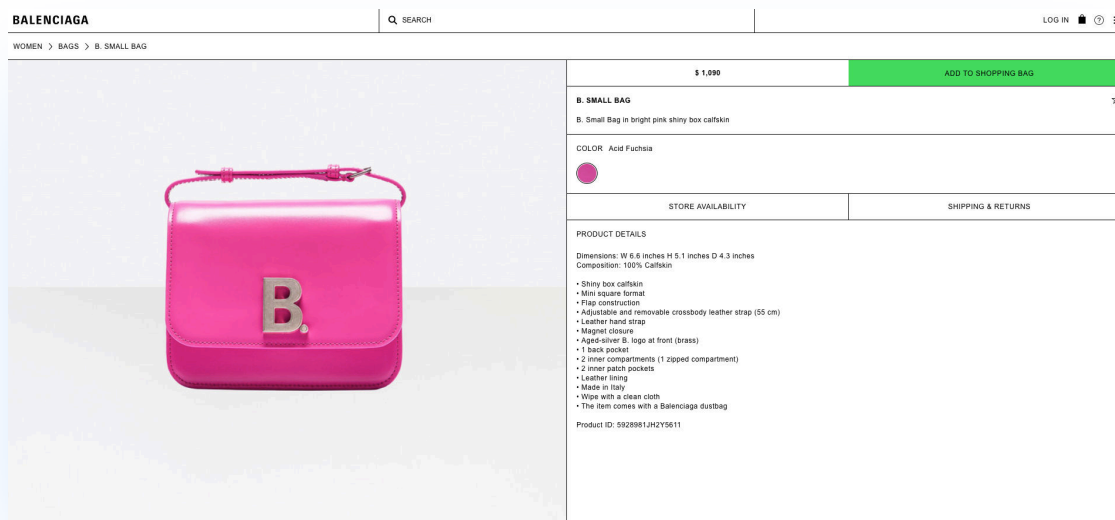


This is perhaps an extreme example, but luxury retailers should and can still impress with a mixture of site design and great customer experience.

Product Imagery

Great use of imagery can define a luxury site. It can be used to impress on homepages, or to show products in the best possible light.


For luxury products, images should be of high quality, allowing shoppers to zoom in to see details and materials.







Copywriting


Product copy needs to convey the quality and luxury of the product. The tone of voice needs to match the product and price, explaining why these products may be worth paying thousands for.

Luxury product copy can talk about the design process (hand-made, artisan, etc) and the quality of materials used to underline the value of products. For example, the copy for this Givenchy bag talks about it being 'the perfect investment piece'.



GIVENCHY
Mystic small leather tote
£2,190.00

Choose your size  [View Size Guide](#)

ADD TO SHOPPING BAG **ADD TO WISH LIST**

+ SIZE & FIT INFORMATION
- EDITORS' NOTES

Givenchy's 'Mystic' tote is the perfect investment piece - it's versatile, timeless and sized for everyday use. Inspired by Clare Waight Keller's couture silhouettes, it takes its name from the half-hidden lock, which opens and closes to form a double G plaque. It has a slip pocket along the back for easy access to your phone, plus a detachable shoulder strap for busier days.

Shown here with: [Givenchy Sweater](#), [Givenchy Coat](#), [Givenchy Pants](#).

STRATEGIES TO INCREASE ONLINE CONVERSIONS

The online fashion market has, in general, been ahead of the curve for online retail. It has historically adapted to digital faster than sectors such as travel and its high volume and product turnover is well suited to online.

Fashion retailers face challenges in the way they adapt to the growing use of mobile shopping, and how to match the in-store experience - selling to customers without the ability to try items before they buy.

While the types of tactics and marketing strategies for luxury and general fashion sites have many similarities, there are several areas where they diverge or at least areas where the different retailers place greater or lesser focus.

Greater Focus on Loyalty and Retention

Building relationships with customers and increasing customer retention is something most online retailers will aspire to, but luxury brands can have an advantage in this area.

Luxury retailers are selling higher-value products to generally smaller numbers of customers, and means they have more time and resources to focus on customer relationships, compared to mass-market retailers.

This allows luxury brands to focus on keeping loyal customer segments happy with more personal service and perks like exclusive access to new collections and private sales.


It can pay off too. For [Net A Porter](#), 2% of its customer base generate 40% of its sales, and shop 12 times more often than the average customer.

Their EIP (Extremely Important Person) loyalty program aims to reward shoppers who spend big, keep them engaged, and to provide them with plenty of opportunities to spend more.

From the customer's perspective, being singled out for the personal treatment makes them feel appreciated by the retailer, and therefore more loyal.

EXTREMELY IMPORTANT PRIVILEGES

As a NET-A-PORTER EIP, you are an Extremely Important Person to us.
You can enjoy the following Extremely Important Benefits which are our ultimate shopping experience.



PERSONAL SHOPPING SERVICE

Your own dedicated Personal Shopper is on hand to help you with all your style needs, from finding the pieces you love to size and fit advice



COMPLIMENTARY WORLDWIDE DELIVERY

Enjoy unlimited free complimentary shipping anywhere in the world, plus same-day service in London, New York and Hong Kong



PRIORITY ACCESS

See and shop What's New 36 hours before anyone else with your Extremely Important Preview service

It doesn't just have to be about loyalty schemes. By simply identifying valuable customer segments and catering to them, marketing can be so much more effective.

For example, using customers' on-site browsing behaviour and their purchase history, emails and content can be personalized, and therefore much more relevant to customers.

Focus on customer experience

Customer experience covers a range of different factors, from on-site usability, to customer service interactions. An excellent all-round experience, from the site visit to delivery, to any post-sales interactions can set any retailer apart from competitors.

Online, luxury brands need to provide excellent customer service when and where it's needed. Customers are likely to expect a higher standard of service from luxury brands if they have any problems post-purchase.

Customer expectations around delivery are higher than ever before. It's no longer sufficient to simply offer delivery within three to four days, so luxury retailers need to provide next day, specific time slots and even same day where possible. More importantly, items need to be delivered on time.

Packaging is a great way of delivering that 'wow factor' for customers. To an extent, the packaging needs to reinforce the promise of the brand. If people order an expensive handbag, standard brown packaging won't do.



Cart Abandonment Emails

Cart abandonment rates are higher for luxury fashion brands (90.1%) compared to other fashion retailers (85.45%).

Cart abandonment recovery is a tactic that will work for any retailer, but with higher abandoned basket values, a strategy for recovering lost sales can be a valuable source of income for luxury brands.

The average order value for recovered sales from luxury brands was £389.09 in the first six months of 2019. For fashion overall, the average recovered order value is £147.79.

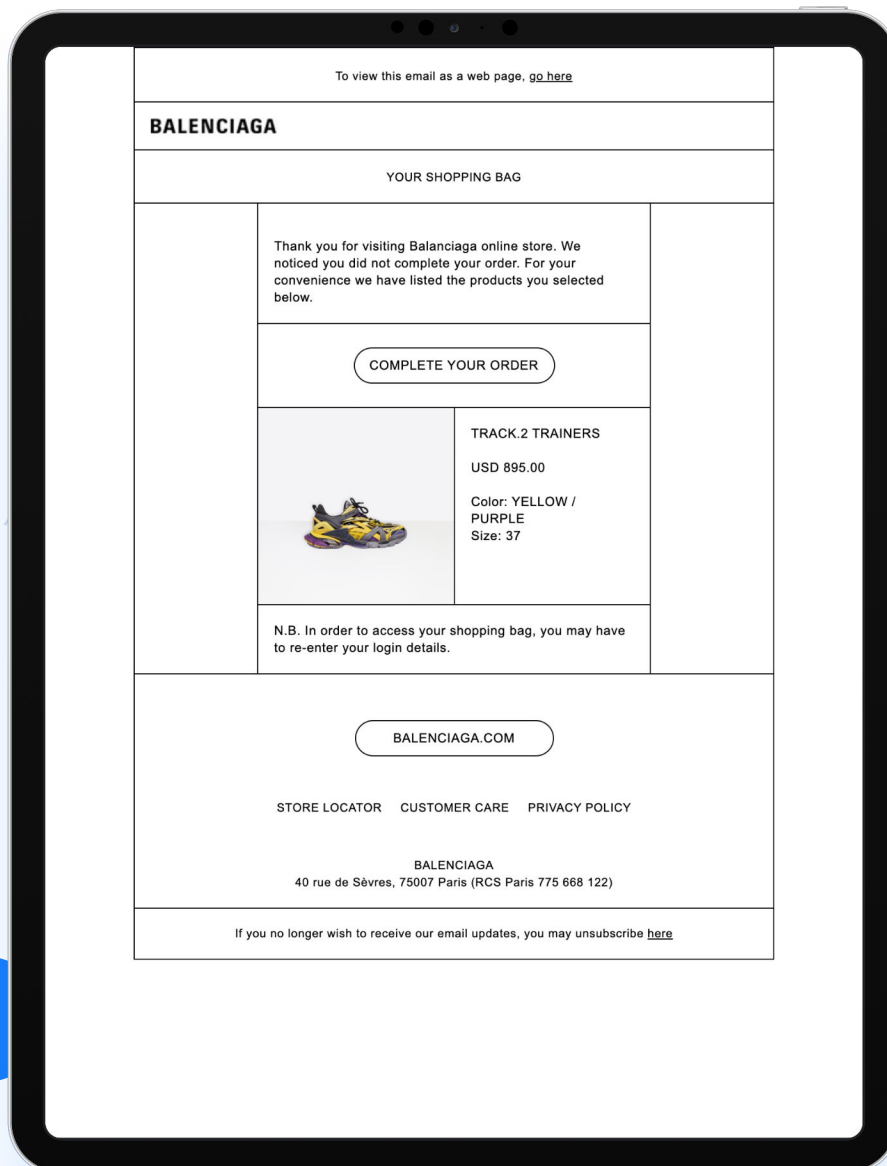
This underlines the value of a cart abandonment strategy for luxury fashion retailers.



A good cart abandonment email reminds the shopper of the items they purchased and offers a quick and easy route back to checkout to complete the transaction.

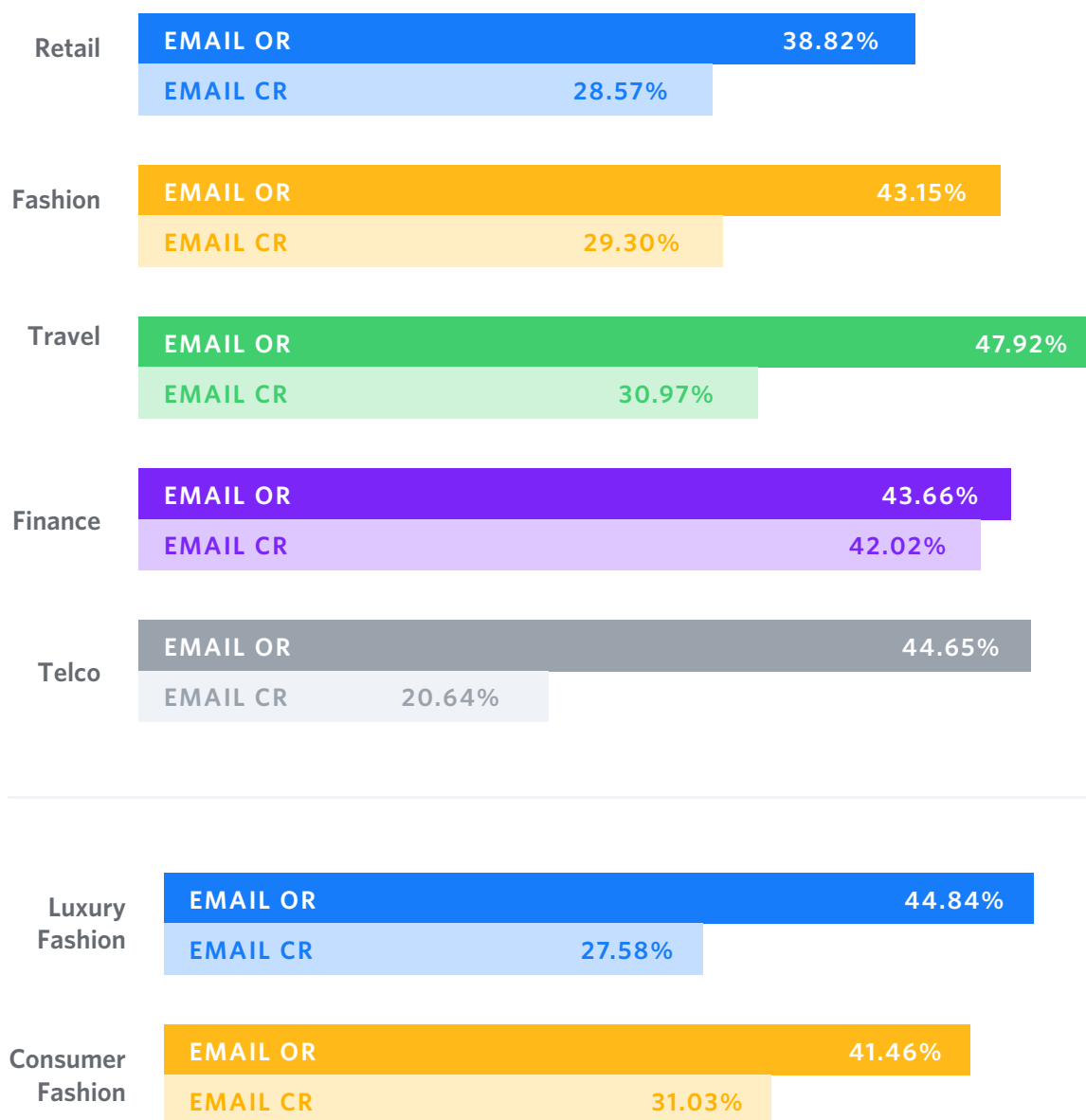
They should be well-timed so that the purchase is fresh in the customer's mind - emails sent up to an hour after abandonment often work best, but the key is to test to find the best time to send for each segment and brand.

They should also be on-brand, which is certainly the case with Balenciaga's abandonment emails, which reflect in the minimalistic design of the site.



Cart abandonment emails for luxury brands have some of the best performance stats of any marketing email with open rates averaging 44.84% and conversion rates at 27.58%.

EMAIL OPEN RATES (OR) AND CONVERSION RATES (CR) BY INDUSTRY



SaleCycle, 2019

Payment Options

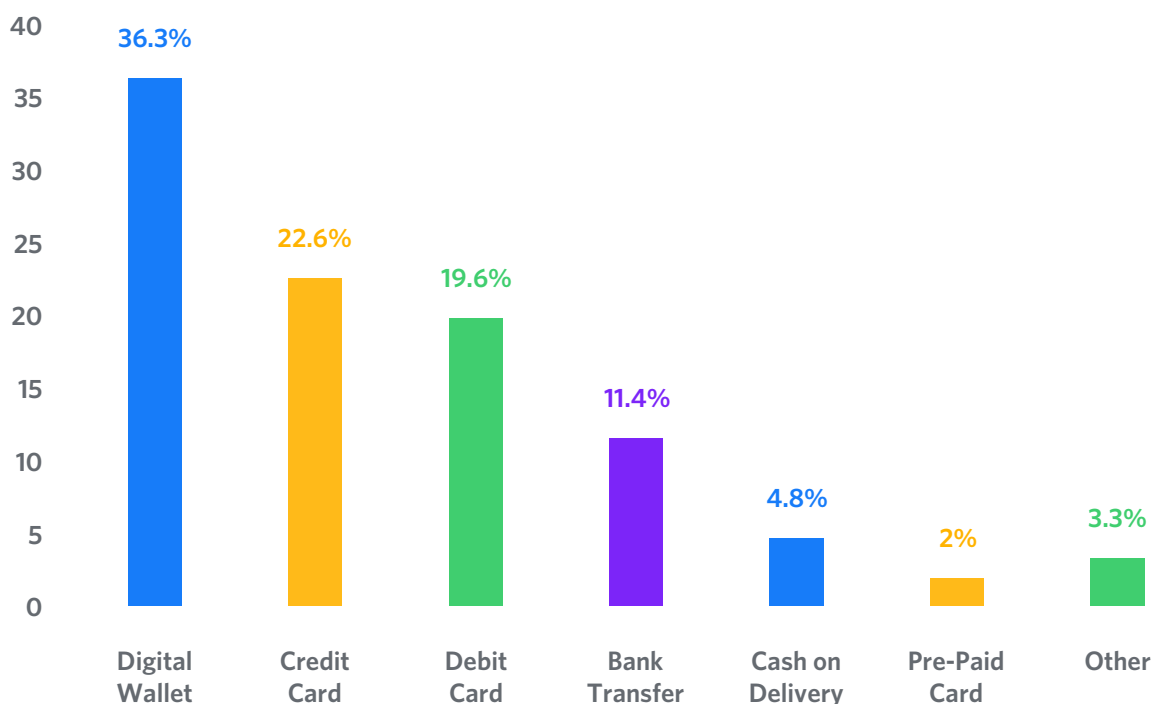
Once customers have selected items and entered the checkout, the key for retailers is to minimise the amount of friction from this point. This means making it easy to add details and complete the payment process.

Payment is an area where shoppers can be deterred from a purchase. In fact, our stats show that 6% of shoppers abandon purchases because their preferred payment option was unavailable.

Simple payment forms help to make entering address and card details less of a frustration for users, but it also helps to provide a choice of payment methods.

Payment preferences will change between different shoppers, as well as varying between countries.

GLOBAL ECOMMERCE PAYMENT METHODS (2018)







Statista, 2019

Providing choice for shoppers allows retailers to cater to different preferences, and minimise the risk that shoppers will abandon because they're unable to pay the way they want to.

PAYMENT METHOD

☒ **Credit/Debit Card (most popular)**
You may be directed to your bank's 3D secure process to authenticate your information.




Card Number *

Name on Card *


Expiry Date *

Month

Year


CVV * 

☐ **Paypal**



You will be redirected to PayPal, where you can pay and complete your order.

☐ **Buy now, pay later with Klarna**



Try before you buy and pay up to 30 days later with Klarna.
You will be redirected to Klarna, where you can complete your order. [Payment terms](#)

☐ Use a Reebok gift card

Reebok offers a choice of card payment, as well as PayPal, and Klarna, a solution which allows shoppers to defer payment, or pay in instalments.

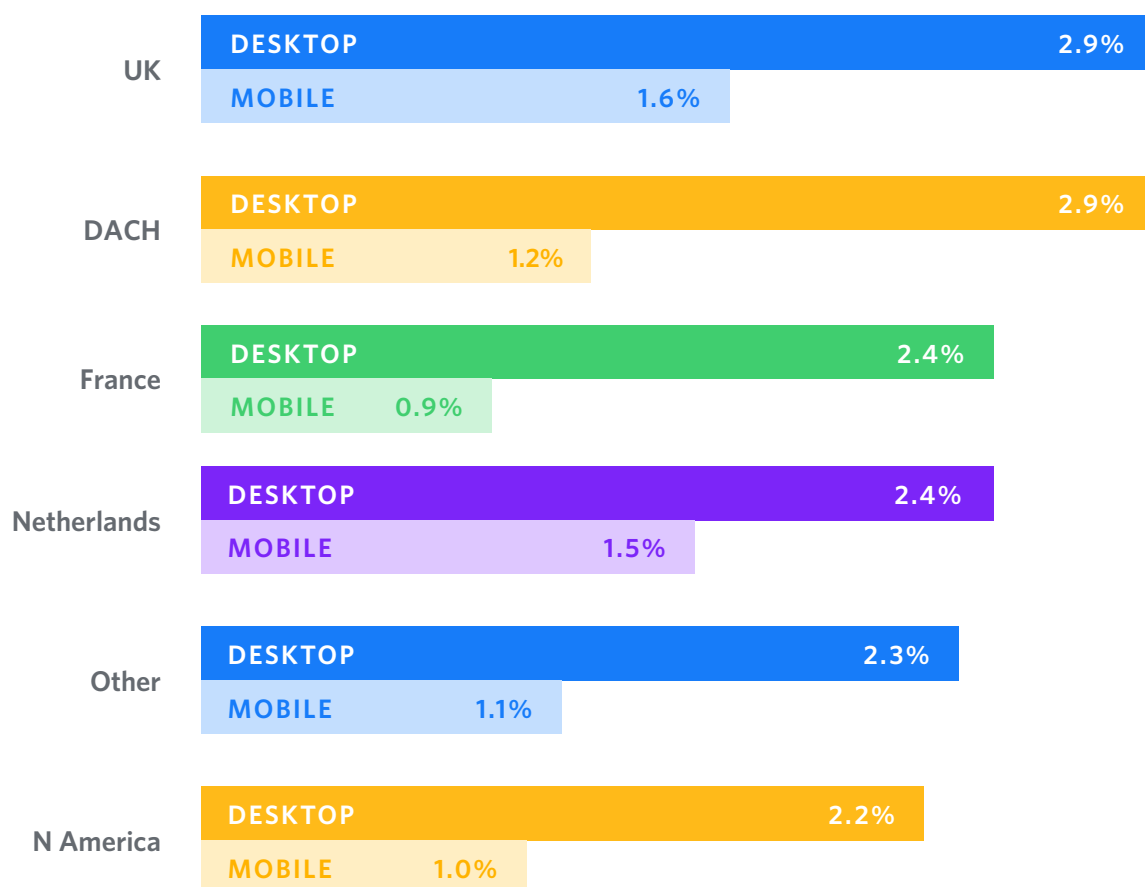
Mobile Optimisation

Fashion ecommerce retailers typically attract a younger demographic whose preferred shopping device is often mobile.

Our stats show that fashion retailers generate a greater percentage of sales via mobile than the average retailer (51.3% v 41.3%). This underlines the need for fashion retailers to deliver an excellent user experience for smartphone shoppers.

Even for fashion retail, mobile conversion rates tend to lag behind desktop. In the UK, the average mobile conversion rate is 1.6%, in North America, just 1%, compared to 2.9% and 2.2% respectively for desktop.

ECOMMERCE CONVERSION RATES BY DEVICE (2018)



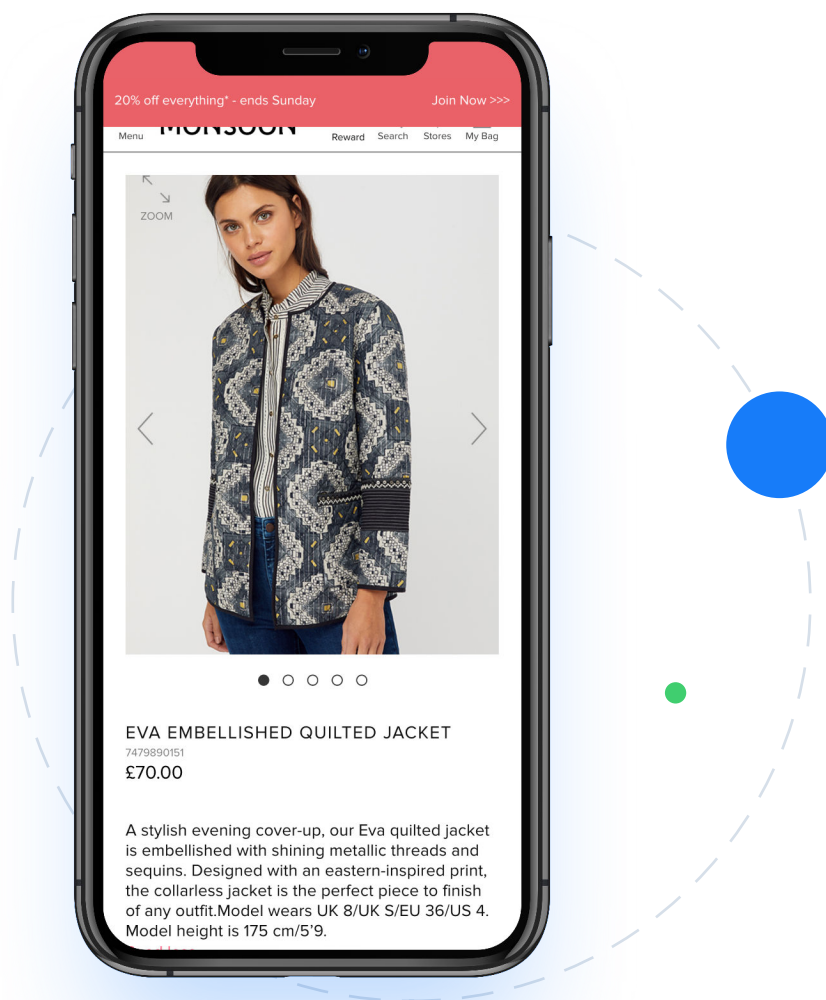
Nosto, 2019

This reflects the relative difficulty of transactions on mobile. There are many possible factors here, from ease of navigation to the ability to view product images and video.

Retailers can address some of these issues through good design. For example, it can be a challenge to make mobile product pages as easy to use as desktop. Mobile product pages need to adapt to the limitations of the device, while providing the same choice of information and imagery as desktop pages.

It can be done effectively, and Monsoon is a good example of this. It has a range of high-resolution product images for each item showing a mixture of views, and which shoppers can zoom into to see products in detail.

Retailers need to help customers to make an informed purchase, and details like showing the size of the jacket the model is wearing, and her height all help.

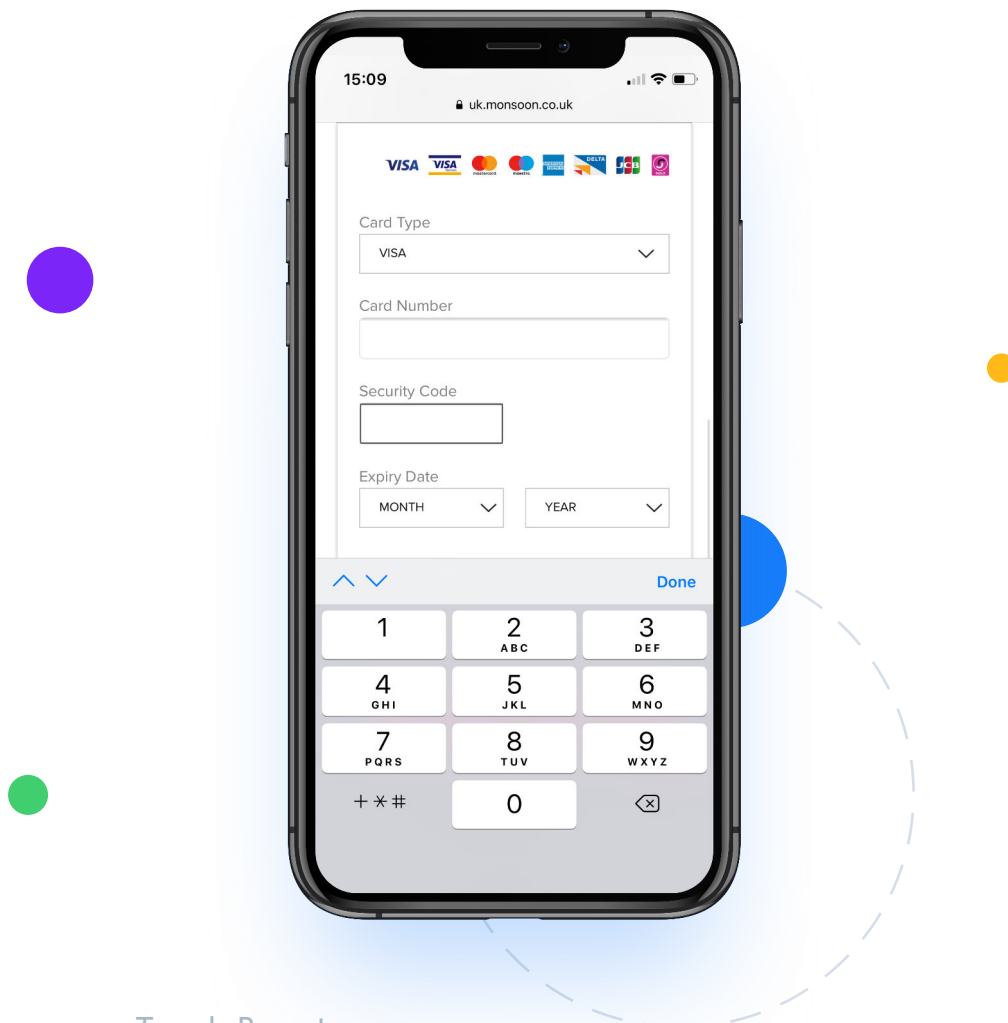


Perhaps the biggest potential barrier to mobile conversion is checkout. It's often much easier to complete payment on desktop than on a smaller mobile screen.

With a smaller screen, it's easier to make mistakes entering address and payment information, while variable mobile internet coverage can add further complications for shoppers.

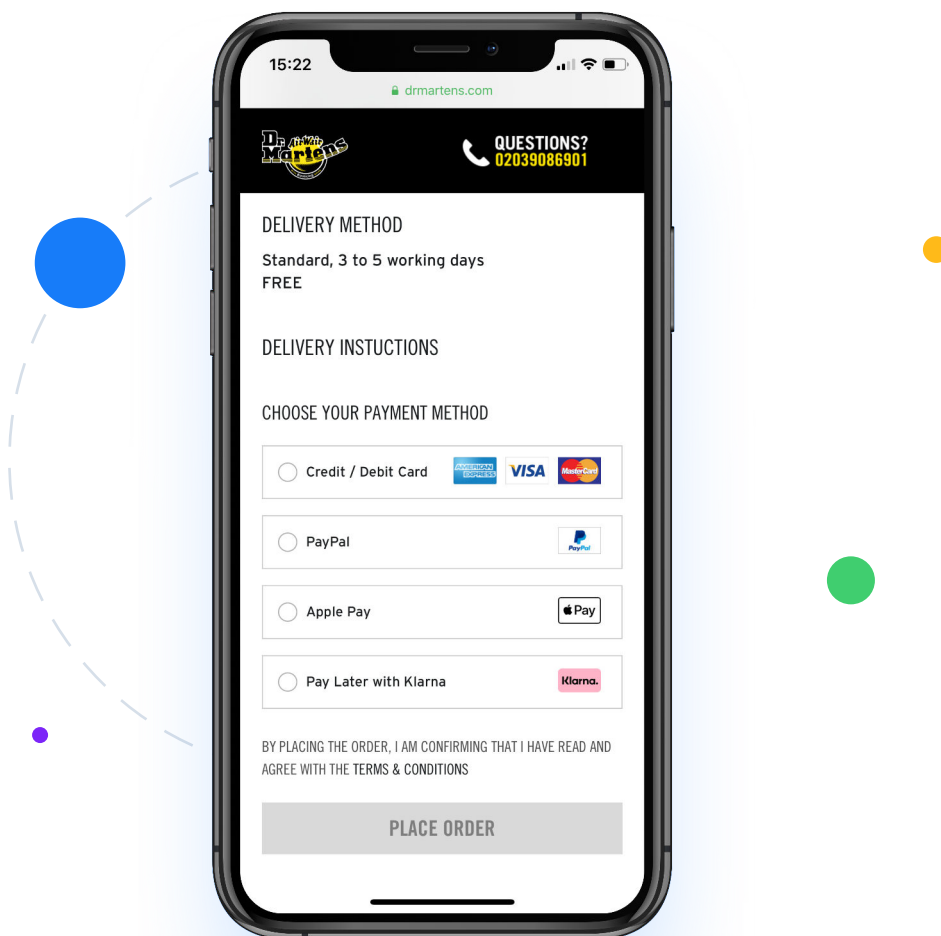
The best fashion mobile sites try to make checkout easier with shortcuts. Guest checkout saves the hassle and extra effort of registration, while address entry shortcuts reduce the amount of data entry required of customers.

Payment shortcuts are welcome too. Monsoon offers credit card scan which uses the smartphone camera to quickly pick up the card number and expiry date. Little touches can also help, such as defaulting to the most appropriate keyboard for the information required, the numeric one in this case.



Alternative payment methods can also provide helpful shortcuts. Offering PayPal or similar methods means the customer just has to enter their email address and a password.

Some are even easier. Apple Pay, and similar methods like Google Pay can reduce the effort required to Touch or Face ID.



Dealing with Sizing Issues

Some of the most common reasons for abandoning clothing purchases are concerns about the fit and the appearance of products. These issues are also the reason why returns rates for fashion are higher than other retail sectors.

Retailers face a challenge. They want to reduce returns rates, but making it harder or less convenient to return items can deter shoppers from converting.

There are a number of ways to address this issue:

1. Make it easy to return items

According to stats from Shopify, 83% of consumers read returns policies before they buy, and most say the costs of returns can prevent them from buying at all. If a customer is unsure about a purchase, but knows they can return products without hassle or extra costs, they'll buy more confidently.

Returns can help customer retention too. 77% of returns come from repeat shoppers, while 72% of consumers are more likely to spend more on a site with easy returns. This is why sites like Zappos offer 365 day returns policies.

Research from the University of Dallas found that, while more free and easy returns policies did correlate with more returns, it was even more strongly correlated with an increase in purchases. The same study found that longer returns policies, with time limits more than 30 days after purchase, can actually reduce returns.

2. Give shoppers all the information they need

If customers are able to make an informed purchase decision, they're more likely to find the product that suits them and less likely to return it later.

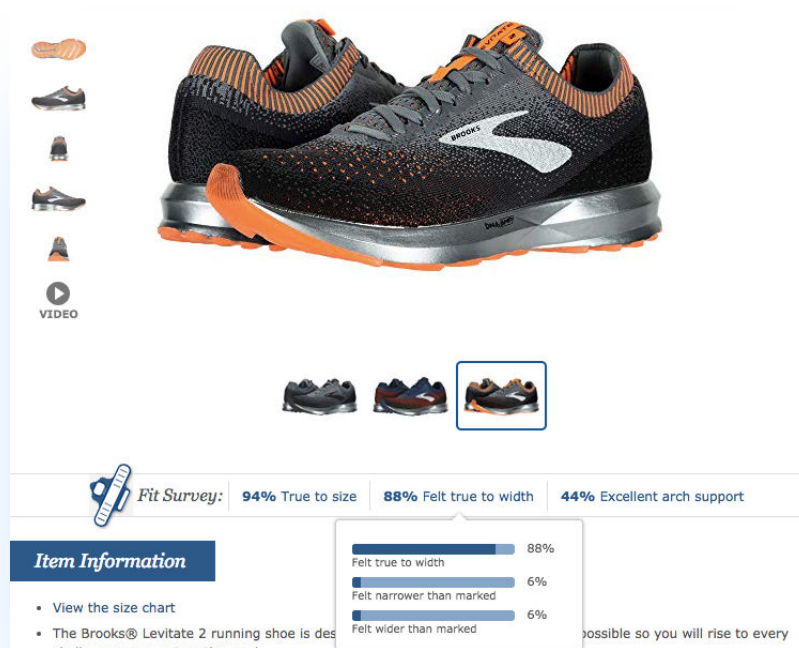
Well presented product images can sell fashion items by ensuring they look appealing to shoppers, but images also help people to understand products better.

Showing products from many different angles, and allowing people to zoom in, can help them to decide whether a product is right for them.

In this example from Reebok, shoppers can see design features and materials in great detail, and from several angles...



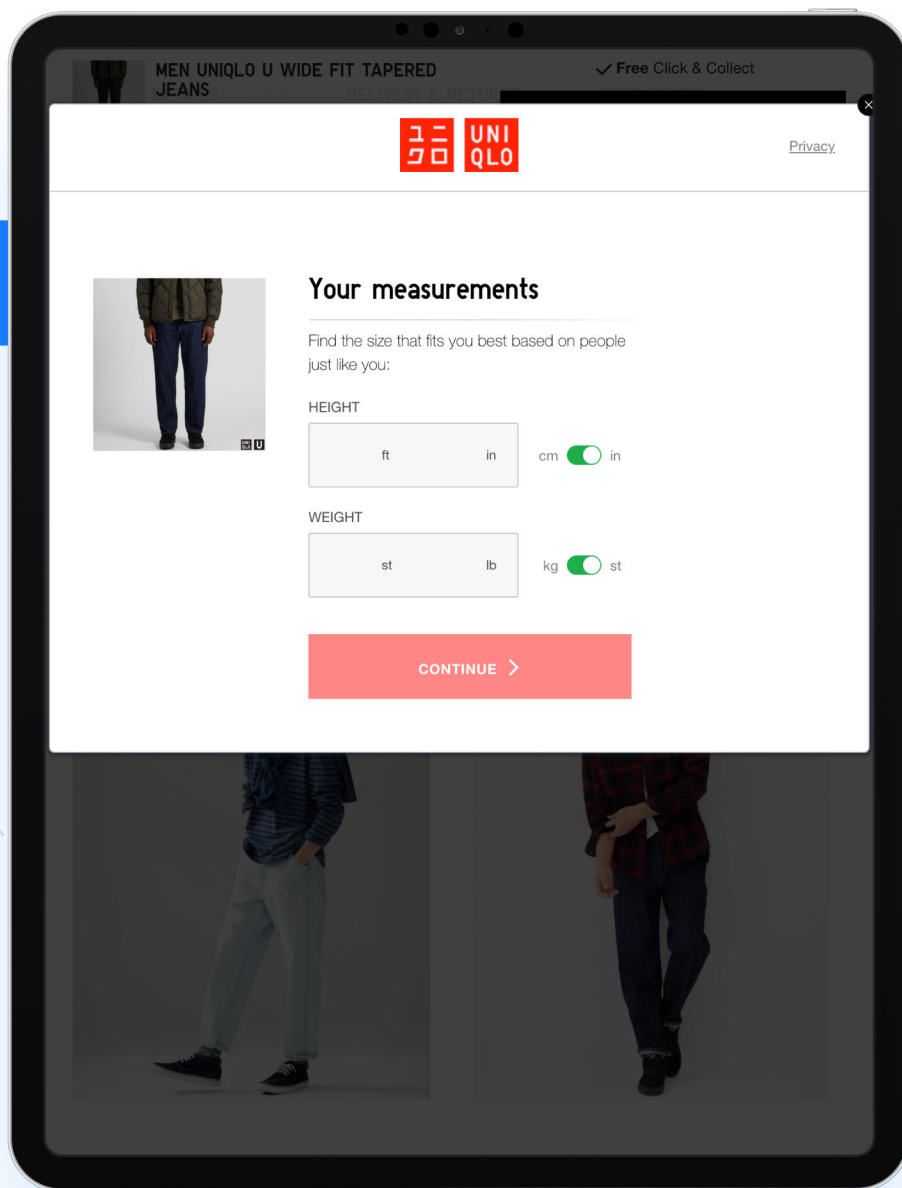
Information on size and fit from other shoppers can also help. Zappos displays survey data from customers on its product pages to provide some valuable insight which helps customers to make a more informed decision.



3. Sizing tools

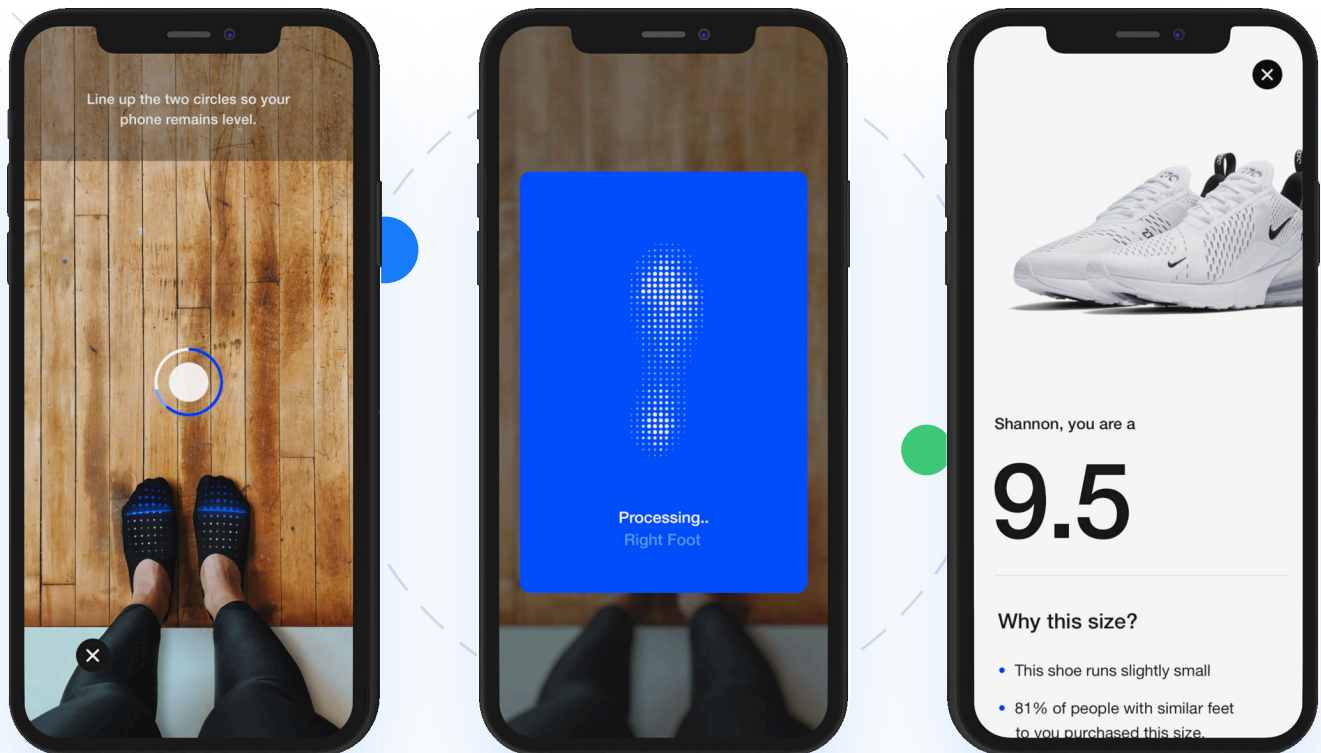
Some sites use fitting tools to help customers decide on a purchase and ensure they find the right size for each product. Shoppers confident about size and fit are more likely to buy, and less likely to return products.

These tools often ask customers about their measurements, how they prefer clothes to fit, as well as using data from other customers.



Other examples include Nike's Fit App, which uses augmented reality to measure the shopper's feet.

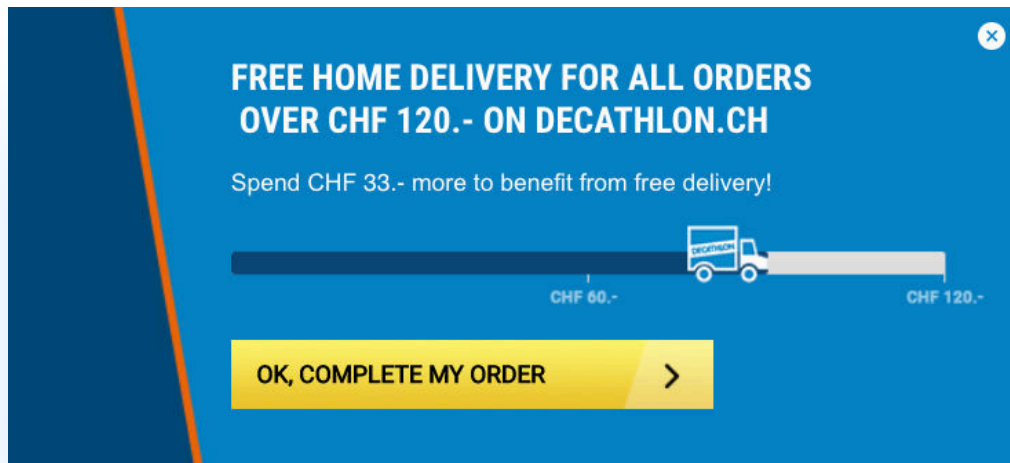
Based on these measurements, the app will then recommend a size for each shoe the customer views on the app.



Driving Up Average Order Values

A focus on driving up average order values (AOV) is a smart strategy for any fashion retailer, and especially for those working with relatively low margin products. There are a number of tactics retailers can use to drive up AOV.

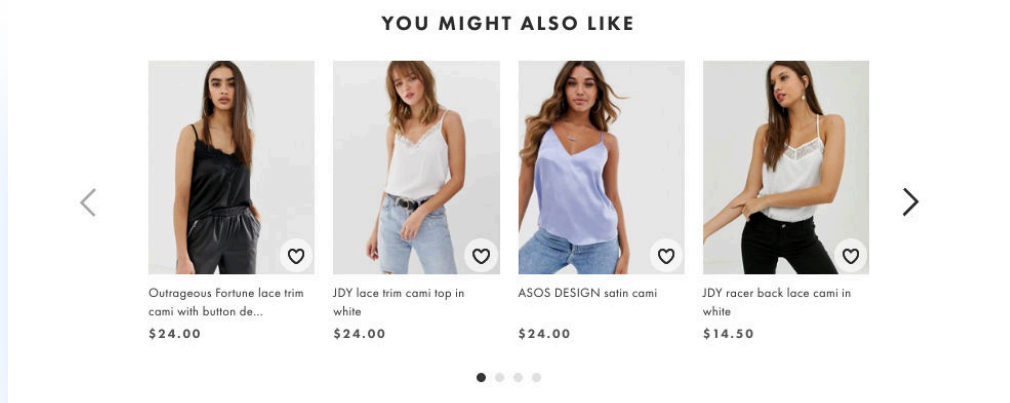
Free shipping thresholds can be used as a carrot to encourage people to spend a little more to qualify. It helps to show a visual cue, like a progress bar to let customers know they'll save on delivery if they spend a little more.



Upselling and cross-selling can be used to either persuade customers to choose a more expensive version of the product they're viewing, or to add complementary products to their order. In both cases, it's about enticing customers to spend more with relevant messages and recommendations. For example, retailers can show more expensive versions of the clothing customers are considering, to show some of the alternatives available.

This may be about highlighting the extra benefits you can get by paying more. For a product like laptops, spending more may mean more memory, or a faster processor for example. In fashion, it can be about highlighting other options relevant to the products viewed, to tempt the customer to spend more.

Effective cross-selling is about showing relevant recommendations which complement the product viewed, such as showing products to 'complete the look'.



SUMMARY

The statistics and trends in this report highlight the importance of mobile for fashion ecommerce, whether luxury or consumer fashion, and shows how successfully many fashion sites have adapted to the growth of mobile shopping.

Both consumer and luxury fashion sites attract the majority of their sales from mobile shoppers and are also successful in terms of response to cart abandonment emails opened on mobile devices.

However, fashion sites face a challenge to reduce cart abandonment, with higher average abandonment rates than retail and other sectors. Luxury fashion, with an average abandonment of 90%, has the highest abandonment rate of all the sectors we track, as higher price tags mean customers often take more time to make a decision.

The source of the problem may be in the unique challenges that fashion sites face, namely the ability of shoppers to try items for size and fit before they buy. This isn't so much of a problem for a retail site selling laptops or TVs, but it's hard for retailers to match the in-store experience on fashion sites.

For fashion brands, both luxury and consumer, the answer to these challenges is to focus on delivering a customer-focused user experience, which makes it easy for shoppers to find items and pay in the ways they expect to.

This is the key to delivering lower abandonment rates, and increasing profits through increased conversions and improved customer retention.



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