

# UKOM Insights

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## Fashion Retailers

It's London Fashion Week, TV stars are launching new clothing collections and the nights are drawing in which means it's time to start thinking about Autumn/Winter wardrobes. At the same time, this month is Oxfam's 'Second-Hand September' — an initiative to encourage people to help the environment by making them pledge not to buy new clothes. In July 2019, 27 million UK adults visited clothing retailers online and every month Comscore reports on over 300 properties which are classified under the category 'Retail - Apparel\*'. This week UKOM explores usage of the category and identifies winners and losers over the last year.

In July 2019, 60% of adult internet users visited a clothing retailer online. This was significantly higher among females (78%) than males (44%) and even higher among females aged 25-34 (90%). Visitors to apparel retailer sites online spend on average 37 mins per month but again this is higher for females (44 minutes) than males (24 minutes). Adults aged 18-24 spend longer (49 minutes) rising to almost an hour for 18-24 women (59 minutes).

Platform usage for the retail clothing category differs significantly from the overall internet. Desktop ONLY reach is 3x higher for the apparel category than average (16% v 5%) and the percentage who access clothing retailers online using ONLY a mobile device is more than double the online average (73% v 35%). This high single device usage results in very low multi-platform usage for the apparel retail category — only 11% compared to 60% for the total internet. Although the majority of time spent on clothing retail sites is via a mobile device (67%), the desktop accounts for a greater share of minutes online than the internet average (33% for apparel v only 22% for total internet).

Further differences occur when looking at access type within mobile. Of the 22.6m monthly mobile visitors to clothing retailers online, 95% access via a mobile web browser and ONLY 24% use a mobile app. This is despite visitors to retailer mobile apps spending a lot more time (52 minutes per month) than those who access via web browsers (17 minutes). This results in the share of mobile time spent on apps for the clothing category being much lower than the internet average (43% v 85%) where high app share is driven by social networking, instant messenger and entertainment categories. Choice of app v browser differs significantly by age for the clothing retail sector. Whilst share of mobile time spent on apps is 66% for 18-24s, it drops to only 28% for 55+.

Which are the biggest fashion sites online in terms of number of users according to UKOM approved Comscore data and how are they performing yr-on-yr? Of the retailers that Comscore classifies as 'Apparel', (this excludes stores such as Debenhams & M&S which are classified as department stores), high street brand Next is the biggest with 5.9m visitors each month — reaching almost every 1 in 7 adults. ASOS and Boohoo are the next most popular in terms of unique visitors. Boohoo is performing well — Comscore data shows it has outperformed the category with UV growth of 26% yr-on-yr — an addition of 663,000 visitors. Boohoo's recently reported sales figures\*\* also support audience data which shows it's been a successful period for the pure play digital fashion brand. In terms of growth,

a couple of others worth mentioning are DePop and Isawitfirst.com. DePop, the social shopping app for buying and selling clothes has both high engagement (53 min per month on average) and high growth (67% yr-on-yr). I Saw It First, which is just outside Comscore's top 20, was only founded in 2017 but grew its audience from a quarter of a million in July 2018 to over 850,000 in July 2019. The brand's fashion partnership with ITV's Love Island in 2019 may explain this uplift - unique visitors surpassed 1 million in June when the TV show launched.

High street giants Arcadia Group (which includes TopShop, Dorothy Perkins, Wallis and Burton), River Island and New Look have all witnessed decreases as has Missguided, but the latter's yr-on-yr decline is likely due to July 2018 being a peak month following its successful collaboration with Love Island's 2018 series.

	Total Unique Visitors/Viewers (000)	% Reach	Average Minutes per Visitor	Yr-on-Yr % change
<b>Category: Retail - Apparel</b>	<b>26,768</b>	<b>60.4</b>	<b>36.6</b>	<b>-4</b>
NEXT Group	5,920	13.4	21.5	-10
ASOS Plc	4,156	9.4	20.6	-3
BOOHOO.COM	3,229	7.3	18.3	26
Nike	2,803	6.3	11.3	16
Arcadia Group Limited	2,780	6.3	5.8	-13
JDWILLIAMS.CO.UK	2,739	6.2	10.2	12
HM.COM	2,671	6.0	13.7	6
New Look Retailers	2,665	6.0	9.8	-18
She In Group	2,412	5.4	10.6	N/A
Adidas Group	1,873	4.2	4.5	0
PRETTYLITTLETHING.COM	1,778	4.0	17.4	-2
MandMDirect Sites	1,754	4.0	8.9	12
SIMPLYBE.CO.UK	1,466	3.3	10.0	-1
RIVERISLAND.COM	1,414	3.2	7.1	-13
MISSGUIDED.CO.UK	1,258	2.8	8.7	-32
EVERYTHING5POUNDS.COM	1,240	2.8	17.3	-4
INDITEX Group	1,178	2.7	15.1	3
DEPOP.COM	1,135	2.6	53.5	67
FOOTASYLUM.COM	952	2.2	11.2	9
SCHUH.CO.UK	905	2.0	3.6	6

Comscore MMX Multi-Platform, Key Measures, July 2019, UK

The fashion industry has been heavily criticised for its negative impact on the environment so buying recycled or second-hand clothes is often both a cheaper and greener alternative. Oxfam's 'Second Hand September\*\*\*' has been launched to encourage consumers to re-use and re-love second-hand clothing rather than buy new items in the month of September. The success of Depop is particularly interesting given it has a big focus on buying and selling unwanted clothes but other fashion retailers are also doing their bit for the environment. H&M was the first brand to launch garment-collecting boxes in its stores to help reduce waste and many of the top online retailers including Boohoo and Misguided are supporting a new app called 'reGain' which encourages consumers to recycle clothing in exchange for discount coupons. It will be interesting to see what impact, if any, these new environmental initiatives have on audience data for the brands featured in this analysis — UKOM will report back later in the year.

#### Notes on Data:

All data is based on UKOM industry standard and development level approved Comscore MMX Multi-Platform data based on July 2018-July 2019. Comscore MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps tablet browsing & apps. All analysis is undertaken on 18+ adults.

All data is based on the '**Retail – Apparel**' category from Comscore. The definitions are: **Retail** – E-commerce and online/offline transaction sites that include manufacturers and retailers. **Apparel** – Sites where users can buy clothing online. Please note that brands such as Debenhams, M&S, and John Lewis are not included as they are classified as Department Stores.

\*\*Source: <https://www.retailgazette.co.uk/blog/2019/06/boohoo-first-quarter-sales-up-39/>

\*\*\* <https://www.oxfamapps.org.uk/secondhandseptember/>