



# FOLLOWING THE FASHIONISTA

Insights into today's digitally connected fashion consumer



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Engage and inspire  
your consumers





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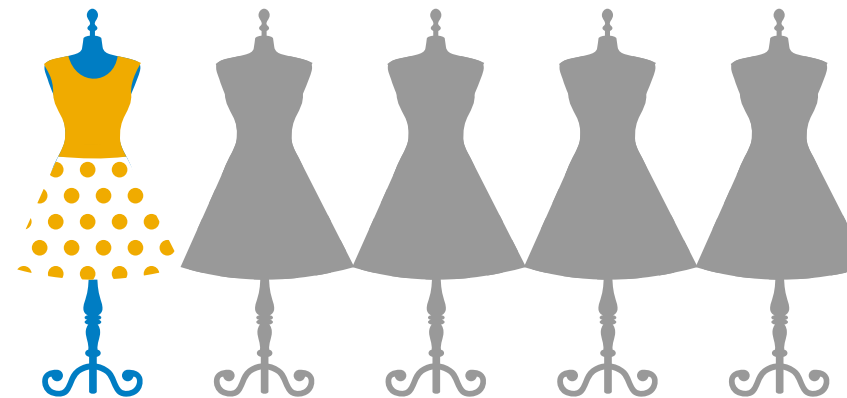
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**Harnessing the digital world has to be a key priority for any fashion brand.**

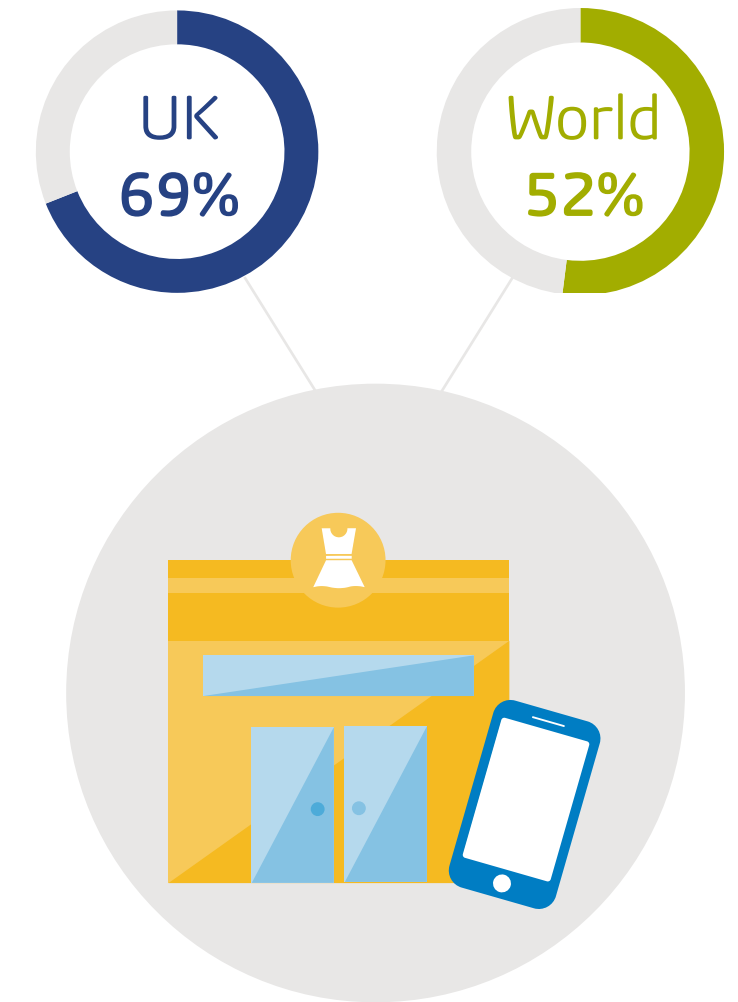
The fashion industry has been struggling across Europe for a while, and with the full impact of Brexit yet to be felt, the fear is the UK will start to follow suit.

Meanwhile the UK consumer has fully embraced online shopping, with only 1 in 5 claiming to exclusively shop for fashion in physical stores (vs. double that globally)<sup>1</sup>. In the same GfK annual FutureBuy study we see clothing and fashion the highest ranked category for omnichannel shopping in the UK (69% vs. 52% globally)<sup>1</sup>. Against a backdrop of gradual but consistent decline in footfall according to

the British Retail Consortium (BRC), and with almost half of UK shoppers agreeing 'I can see a future where traditional retail stores are not a big factor in how I shop'<sup>2</sup>, it is increasingly imperative that fashion retailers realise their full online potential.



**1 in 5 UK consumers claim to exclusively shop for fashion in physical stores<sup>1</sup>.**



**Fashion is the highest ranked category for omnichannel shopping in the UK<sup>1</sup>.**



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## Spontaneous sales in the online environment

Whilst most fashion brands have savvied up to having a good online user experience, and even mobile ready stores, with the exception of a few good examples, many retailers are struggling to create the in-store excitement that sparks spontaneous sales in the online environment.

When visiting the majority of online retailers, shoppers still need a good idea of the items or brands they want to buy in order to navigate successfully. Beyond the 'new in' page, and 'if you like this you might like' suggestions, there's not much in the way of inspiration. 24% of UK shoppers claim an advantage of physical stores is 'I can buy other items at the same time', vs. only

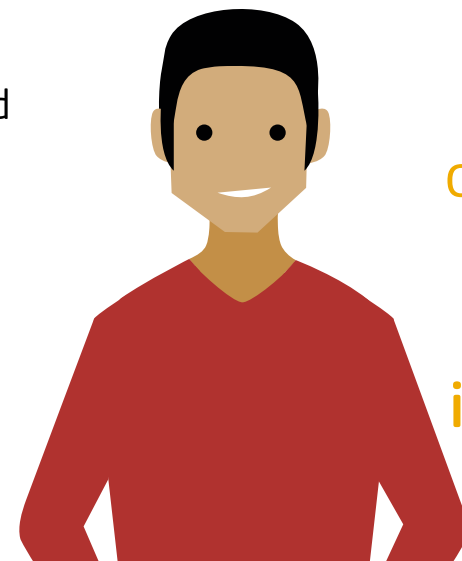
14% for online<sup>1</sup>, suggesting there is a danger that the transition to online could mean fashion shopping becomes more functional, which in turn could potentially stifle growth.

Successful ecommerce isn't just about (up)selling through your website. There is a whole digital world full of potential shoppers just outside your own domain, waiting to be inspired to buy.

Engaging with fashion lovers across the whole of the online world, and especially within social spheres, will be critical to maintaining relevance amongst the digitally connected fashionista. To do this effectively fashion brands will need a solid understanding of what inspires today's shopper, and how and where to engage with them synergistically across both on and offline touchpoints.



of UK shoppers claim that advantage of physical stores is 'I can buy other items at the same time'<sup>1</sup>.





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## Understand the digitally connected fashion consumer to unlock your brand.

Establishing existing behaviours is key to identifying opportunities. But it is through understanding the underlying motivations and aspirations, and how to build strong emotional connections with your target audience, that you are able to disrupt current patterns and create new ones.

Our digital ethnography amongst connected fashion lovers, is designed to explore the role of fashion in their lives, and unpick how they make their fashion choices. The week long interactive diary will aim to uncover:

- ✓ the inspirations and aspirations of fashion followers
- ✓ where and how they currently engage with fashion brands, particularly in the digital environment
- ✓ how relationships with fashion brands are triggered, and built over time, i.e. which brands they love and why
- ✓ the current brand repertoire and how to disrupt it
- ✓ how they make their daily fashion choices, build outfits and what influences those
- ✓ the delight and pain points of shopping online for fashion – who are the winners and losers?





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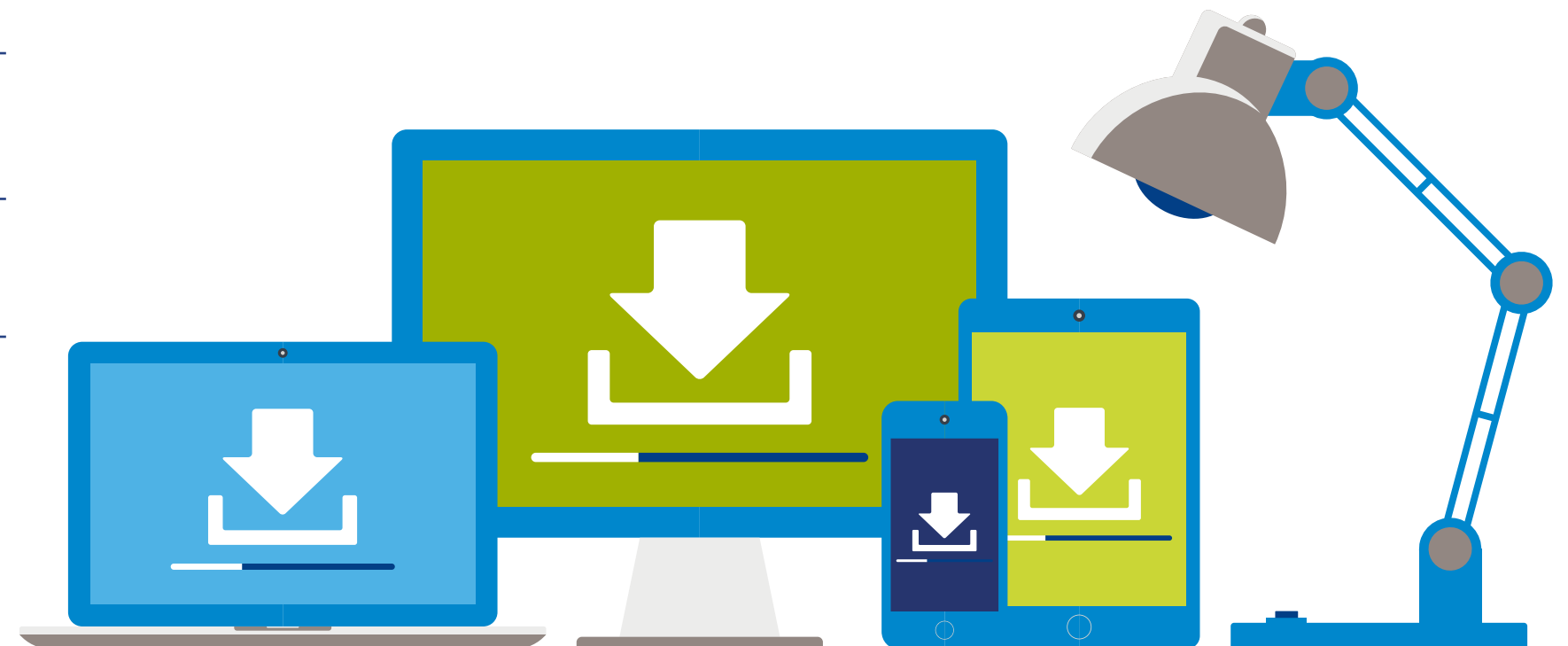
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## Deep understanding of the digitally connected audience

Through this deep understanding of the digitally connected audience, you will learn:

- ✓ how and where to generate emotional brand engagement
- ✓ ways to create inspiration and drive greater brand relevance
- ✓ how best to leverage macro fashion consumer shopping trends
- ✓ ways to positively disrupt current behavioural patterns and trigger purchase – both planned and impulse

- ✓ where there are unmet needs for future innovation
- ✓ the outcome – a consumer-centric strategy that embraces the changes in how fashionistas like to discover and buy





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## Our approach

Our syndicated digital ethnography study will examine the behaviours, routines, inspirations and aspirations of keen fashion followers.

We will invite up to 20 keen fashion followers to participate in a week long online community. All participants will be drawn from our online passive monitoring panel, where we have up to a year of online activity history available, across all devices.

In addition to the daily diary capturing each day's activities and fashion choices, there will be a range of daily interactive qualitative sessions and tasks designed to provide rich insight into the target audience.

Interested in taking part?

Contact us at [ukmarketing@gfk.com](mailto:ukmarketing@gfk.com)







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## Outputs

As well as providing you with observational access to the online community, we will develop a range of engaging outputs including:

- ✓ a short summary video of key study findings
- ✓ illustrative pen portraits
- ✓ an infographic of key online passive monitoring findings

You will also have access to a full download of all verbatim captured during community discussions, and bespoke reports and presentations will also be available to purchase.

Interested in taking part?  
Contact us at [ukmarketing@gfk.com](mailto:ukmarketing@gfk.com)

**DECONSTRUCTING JESS'S PURCHASE JOURNEY: THERE'S MORE TO A BAG PURCHASE THAN WHAT MEETS THE EYE**

Jess wants to buy a handbag on her way to Dubai. To help her make her decision she uses digital channels for comparison and inspiration.

And offline sources to help her make the right decision...

**Online**

- 1 Offer seen on a website
- 2 Check different websites to compare prices, review on social media & duty free stores in airport
- 3 Adds the handbag to the basket but decides to have a last look at the shop before buying it

**Offline**

- 4 Talk to family/friends, looked at magazines
- 5 Go to the shop to have a look at a handbag
- 6 Buys the handbag at duty free in the shop

▶ The purchase journey is no longer a straight funnel of interactions and there are multiple chances to interrupt and influence Jess throughout her journey

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For a free consultation and to find out more contact us on [ukmarketing@gfk.com](mailto:ukmarketing@gfk.com).



#### About GfK

GfK is the trusted source of relevant market and consumer information that enables its clients to make smarter decisions. More than 13,000 market research experts combine their passion with GfK's long-standing data science experience. This allows GfK to deliver vital global insights matched with local market intelligence from more than 100 countries. By using innovative technologies and data sciences, GfK turns big data into smart data, enabling its clients to improve their competitive edge and enrich consumers' experiences and choices.

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GfK. Growth from Knowledge

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