Consumer research 2022

Rethinking online retail sales in fashion

The latest European consumer insights that will be shaping the e-commerce fashion industry in 2022.

sendcloud

Introduction
Interesting facts about the fashion e-commerce market
Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store
1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion
Generation Z redefines the future of fashion
Environmental awareness is increasing
How can you serve a better planet?
Interesting facts about sustainability in fashion

Conclusion
2022 is a critical year for fashion retailers
About Sendcloud & Nielsen

Introduction

It's undeniable that fashion has been the largest e-commerce market sector and the most dynamic one. Well, in this exciting new year, seems like it will keep its position and keep growing in 2022.

As an ever-changing industry, new trends are popping up every day in fashion. And the biggest challenge of online retailers is keeping up with the new industry trends.

But don't worry, if you're an online fashion retailer who is curious about the market dynamics, you're about to embark on a very insightful journey!

This report has been created based on the E-Commerce Delivery Compass including almost 8000 European online consumers. 30% of whom were shoppers within the fashion sector.

Keep in mind that all of the shoppers who joined this survey have ordered at least 1 product from the fashion category in the past 3 months of the research period.

Now, let's spill the beans on online shopper behaviors and the latest trends that are shaping the fashion e-commerce industry. You'll explore how to win fashion shoppers' hearts and minds in 2022 and beyond.

Don't forget to enjoy the ride!

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

Interesting facts about the fashion e-commerce market

For the last 1.5 years, millions of shoppers started embracing e-commerce, leading to a huge boost in sales.

Today, fashion has the highest share of market penetration with its exponential growth and it seems like online sales will continue to be a big part of it.

New wholesalers and giant retailers are using e-commerce as a new sales channel, resulting in a big competitive environment.

But what else?

By the end of 2025 total global fashion market size is expected to reach US$ 1.164,7 billion. (source: Statista)

China is by far the largest online fashion market and its volume is expected to become two times as big as the U.S. When it comes to cross-border shopping, European online consumers buy mostly from China.

Europe takes the 3rd largest fashion marketplace with a customer base shifting from offline to online purchases. Zalando, Vente Privee, Asos, the Otto Group and H&M are great examples of the leading players in Europe.

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

Findings of European shoppers and their buying behaviors

Understanding consumer behaviors is the only way to transform your business in 2022.

It's not easy, but we got you covered!

Gen Z & Millennials order online fashion items more than other age groups.

Women (72%) shoppers tend to buy online more in fashion than men (28%).

80% of fashion shoppers buy directly from online retailers.

Fashion shoppers buy products almost twice a month on average.

Shoppers tend to spend an average of €100 per product.

After electronics, fashion consumers are the biggest fans of international stores compared to other categories like sports and pet supplies.

Fashion buyers prefer shopping from marketplaces like Amazon and eBay rather than social media.

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

Some inspiration:

How Amazon is cracking the code in fashion!

When thinking about fashion, Amazon probably doesn't come to your mind directly.

However, as an e-commerce leader, its developments are interesting to highlight. Here is how the giant keeps both the consumers and the fashion brands happy:

- ✔ Partnering with Vogue to support small and mid-sized independent designers.
- ✔ Launching Luxury Stores to enable shoppers to get exclusive items with fast, free and refundable delivery.
- ✔ Launching Prime Wardrobe to enable shoppers to try their items before actually buying.
- ✔ Launching Drop for influencers to put more focus on trending releases with curated storefronts.
- ✔ Offering access to fashion products that can't be found in physical stores. For example in Drop, each collection is live for a max of 30 hours because fabrics are limited and each garment is uniquely made on-demand.

Unlocking the keys to
the conversion of your fashion online store

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

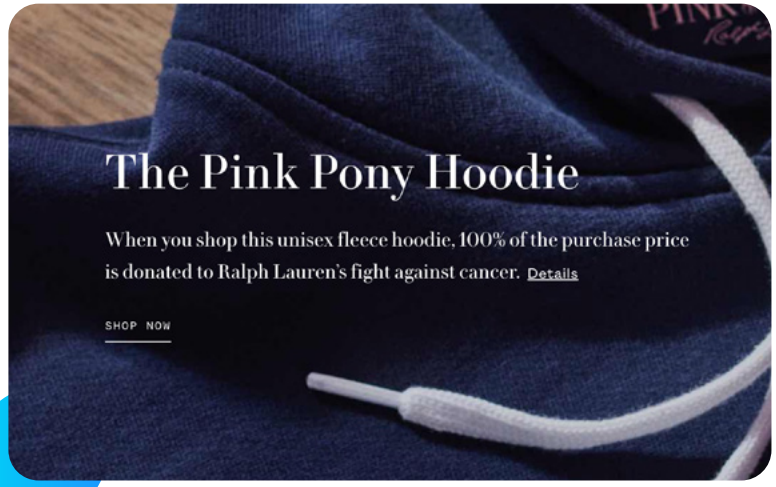
About Sendcloud & Nielsen

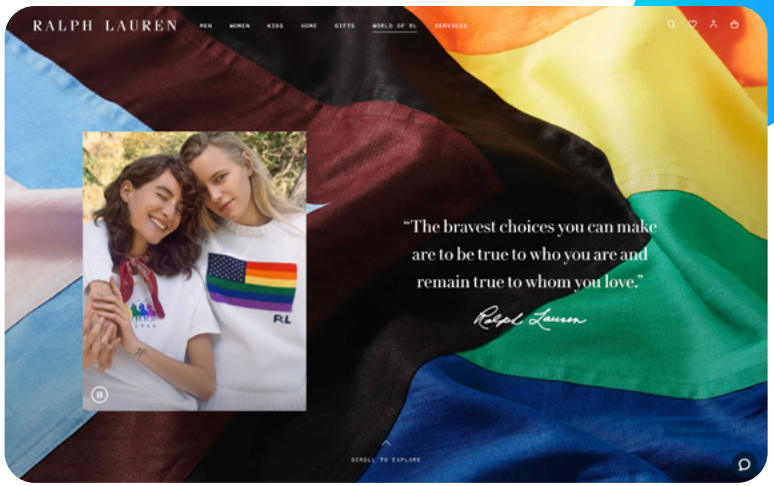
1 Build your brand, brand, brand!

As an inspirational brand, Ralph Lauren positions itself as the innovator of aspirational lifestyle branding.

Over time, they revisited their brand values and started to diversify their portfolio with various product lines regarding their customer's expectations. Today, their sub-labels are more accessible and they stand for different quality, price and target markets.

When it comes to the messaging of their brand, they focus on diversity and other important topics ranging from human rights to cancer research. They provide special collections and campaigns to support each category.





Here are 3 things they're doing very well:

- ✔ Creating their story.
- ✔ Showing their brand values.
- ✔ Offering a website and social media channels reflecting everything about their brand.

Last but not least, they navigate and inform their visitors about the free shipping threshold and delivery method capabilities immediately.

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

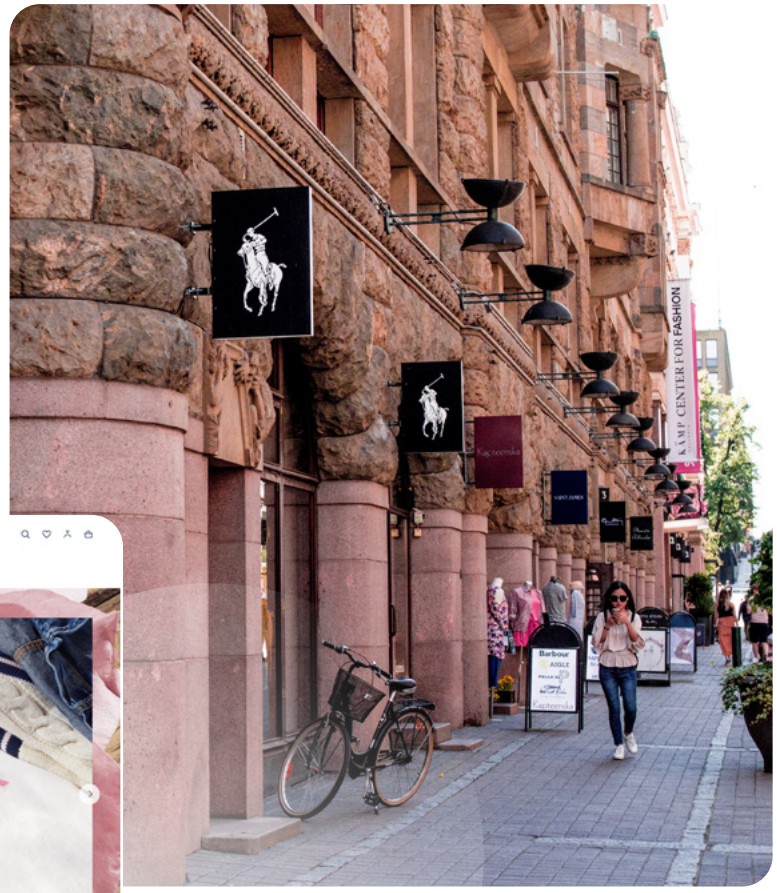
Conclusion

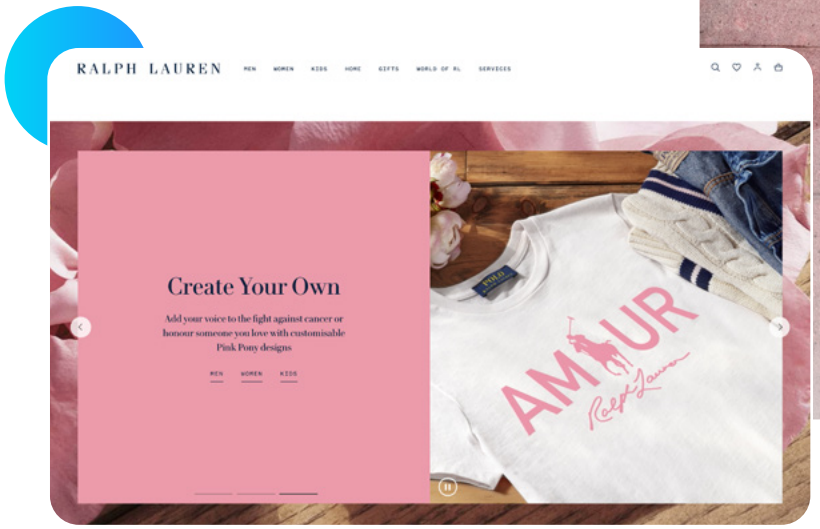
2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

So what's the takeaway here for online fashion retailers?

- ✔ Become a destination for your shoppers.
- ✔ Express your values and build a community.
- ✔ Shine bright with your marketplace product pages.
- ✔ Build relationships with your audience across channels.
- ✔ Offer personalized experiences.





Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

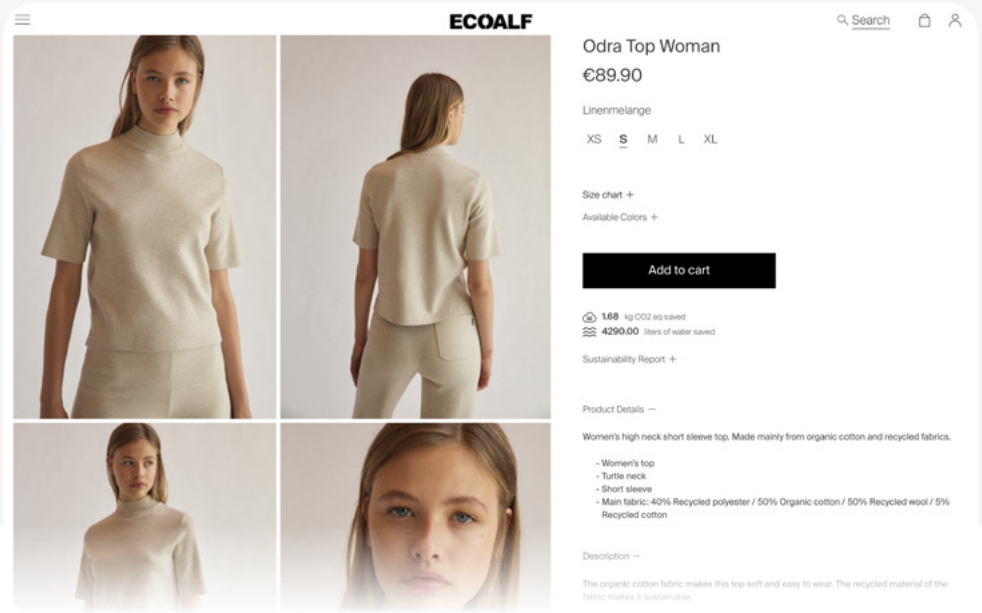
2022 is a critical year for fashion retailers

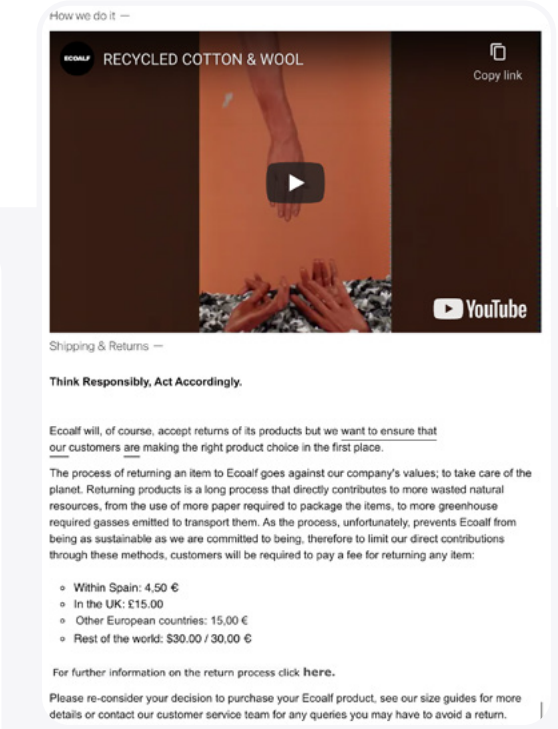
About Sendcloud & Nielsen

2 Make the shopping experience easy for your customers

- ✔ Use product and customer data to improve your UX.
- ✔ Use product categories and include clear descriptions.
- ✔ Navigate them smartly and have a distraction-free checkout.
- ✔ Keep them engaged with your creative content.
- ✔ Inform them about your delivery methods and return policies.

As a good inspiration, Spanish fashion brand Ecoalf offers sustainable clothes with vegan materials. They offer a responsive web design with appealing content and detailed product descriptions. The checkout stage is so clean and leads people to complete their purchases without any hassle.





Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

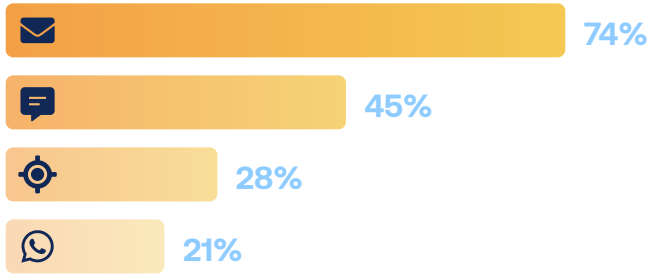
3 Offer a shipment tracking system

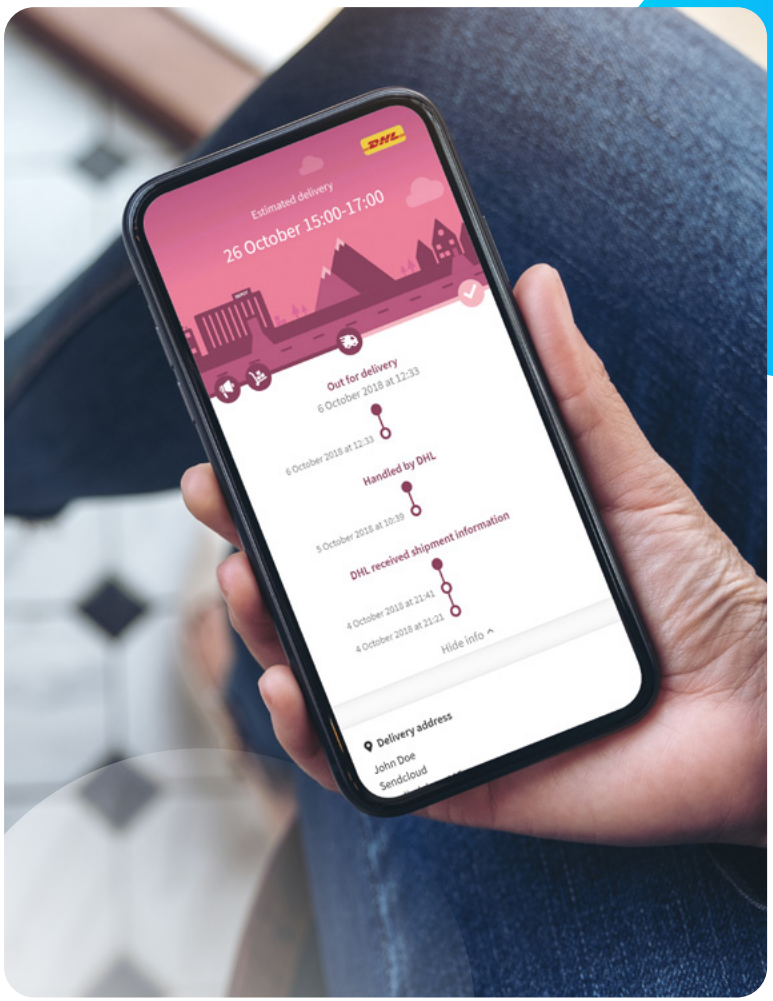
Imagine you've just ordered a new outfit for the wedding of your sister but you still have no idea where the order is... WTH?

To increase customer satisfaction and repeat purchases, offer a shipment tracking system. If you want to drive brand loyalty, branded track and trace notifications are an option of Sendcloud.

Also, why not send updates to your customers in different channels based on their preferences?

Preference for tracking updates through email, SMS, dedicated carrier tracking apps or WhatsApp





Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

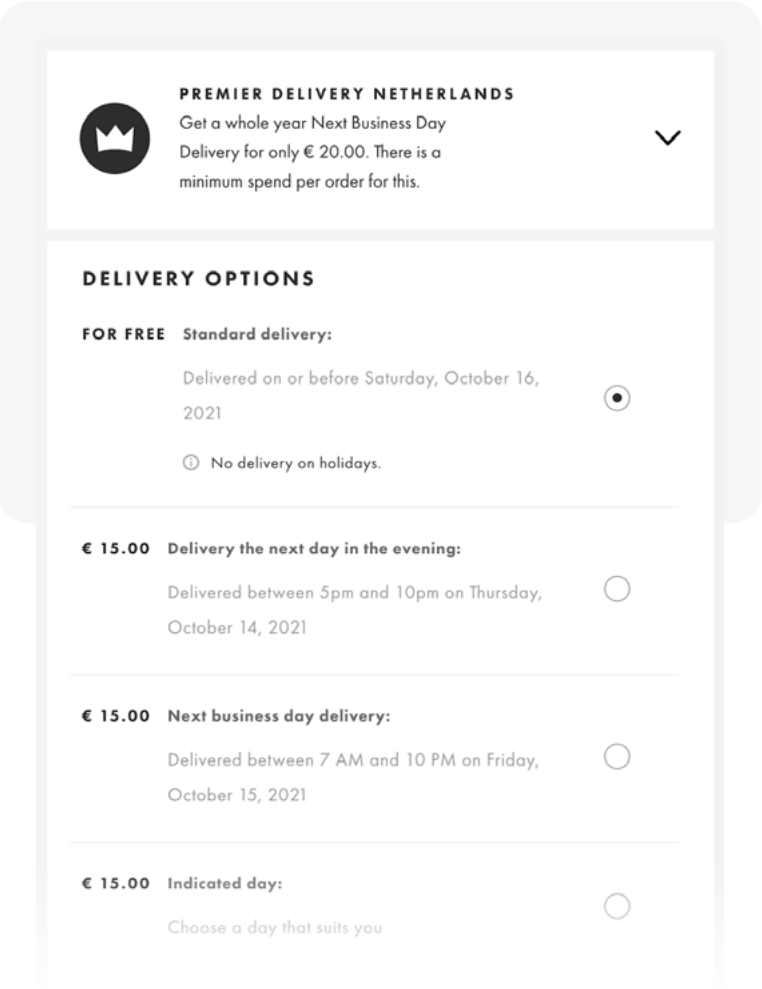
4 Offer flexible delivery

75% of shoppers see flexible delivery as an important factor in their shopping journey. They want to decide how to get their fashion items and therefore you should offer flexible delivery options.

Also, multi-carrier shipping is a rising trend that you wouldn't like to miss in 2022.

For instance, Zalando is already offering multi-carrier shipping with Budbee, DHL and DPD - saving costs and boosting conversions.

The key takeaway here is offering different shipping methods and combining them with various carriers to make your customers happy.



Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

5 Improve the checkout experience

We know your biggest nightmare! It's the cart abandonment rates... This must be the last thing an online retailer can ever ask for. The fact is high shipping costs are devastating for checkouts.

But the good news is, 71% of fashion consumers tend to add another product to their cart to reach the free shipping threshold. So, you can turn this to your advantage.

Get rid of all the distractions on your checkout page and provide your shoppers with a quick way to shop your badass fashion items.

You'll enjoy the increased checkout conversions!

LIMITED TIME

Free shipping

EU orders over 100 € with code: **FREESHIPPINGEU**

Worldwide orders over 200 € with code: **FREESHIPPINGWORLD**

SHOP

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

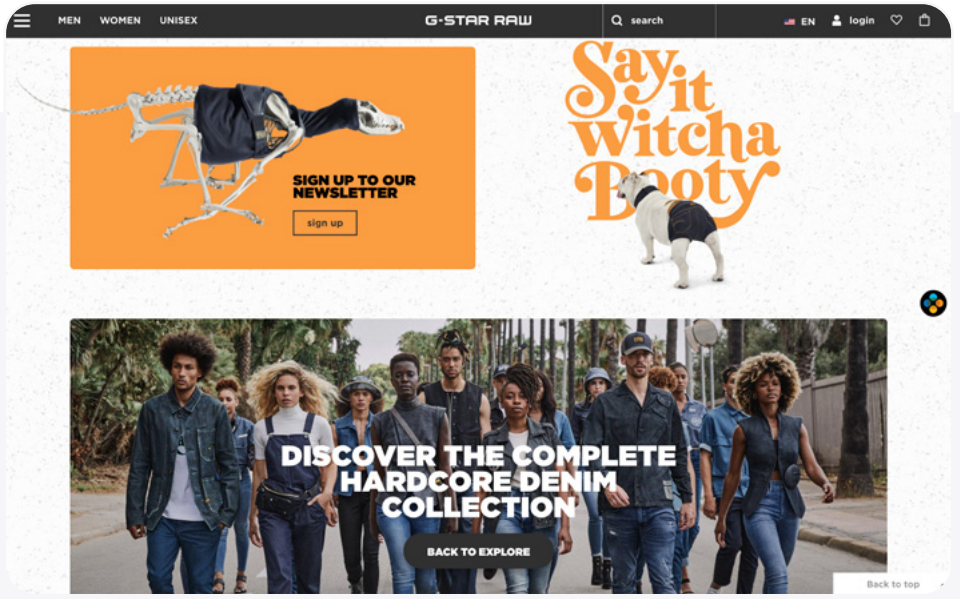
2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

6 Focus on retaining your customers

- Focus more on building a loyal customer base.
- Reward your loyal customers.
- Understand your shopper's inspiration.
- Be creative with your marketing campaigns.

Creative (video) marketing campaign from G-Star RAW



Introduction
Interesting facts about the fashion e-commerce market
Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store
1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion
Generation Z redefines the future of fashion
Environmental awareness is increasing
How can you serve a better planet?
Interesting facts about sustainability in fashion

Conclusion
2022 is a critical year for fashion retailers
About Sendcloud & Nielsen

7 Provide the holy grail of e-commerce: shipping!

Fashion consumers won't care about your fascinating products if your shipment strategy sucks. If you want to turn them into your loyal fans, you have to make sure that the items won't get lost or damaged during the transit.

Some interesting insights

71% **of fashion shoppers considers high shipping costs a deal-breaker**

It's OK for them to pay a maximum of €5.20 for shipping if they've already spent €150 on their orders.

75% **of fashion shoppers see flexible delivery as an important factor**

This percentage is higher than for other product categories like health, electronics and gardening.

1% **of fashion shoppers expect their items to be delivered in just 1 day**

On the contrary, a big majority of them expect their parcels to be delivered within 2 to 5 days or even more.

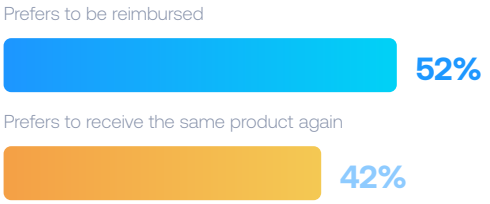
A potential explanation is that SME fashion retailers currently don't have the means to offer fast delivery and almost ¼ of the shoppers are willing to wait for their orders.

Fashion consumers tend to track their parcels via smartphone more than the general average

Possible reason for that is big players adopting new technologies quickly and it became a new standard for consumers to receive updates via their smartphones.

Fashion shoppers want to receive their money back in case their package gets damaged or lost

In that case:



Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

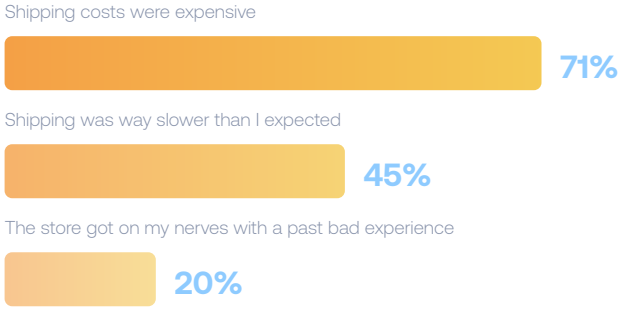
Better safe than sorry

High shipping costs and slow delivery time are still the stumbling blocks of conversions.

And shoppers compare various sellers to make the best out of their deal.

Here are some key insights to optimize your processes.

What's the reason you stop purchasing from an online fashion store?



What is the main reason you wouldn't order from an online store again?

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

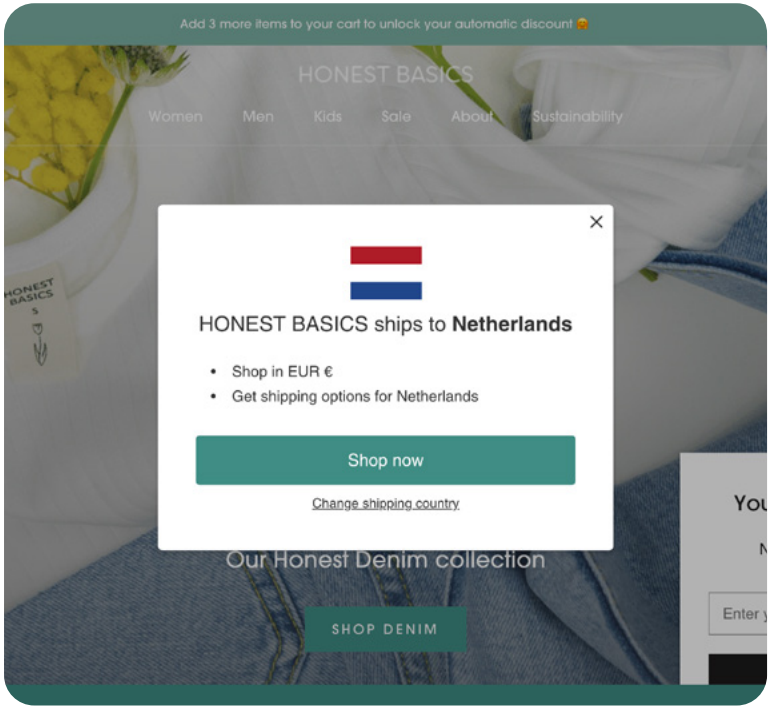
2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

8 Inform about your delivery options ASAP

Online stores that are cutting the bullshit and providing delivery information early on are winning!

Before the checkout, make sure to add your **logistic selling points** into your home and category pages, so shoppers can already read about your delivery options when they're navigating your online store.



Wait, what kind of logistic selling points?

- ✔ Delivery pricing options
- ✔ Return policy
- ✔ Cut-off time for certain delivery dates e.g: "order before 2 pm to get your order today"
- ✔ Special delivery options, such as Click & Collect, Pickup Points, etc.

Good to remember

Fashion consumers tend to pick weekend delivery and evening delivery more than other product categories like pet supplies or electronics.

Next-day cut-off time

Same-day cut-off time

Fashion buyers consider 4 pm as the cut-off time for the next-day delivery and 2 pm as the cut-off time for the same-day delivery.

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

9 Don't let returns hold you back from scaling

Returns are a pain in the ass but you can still turn them to your advantage.

Let's have a look at the main reasons why people return and how you can overcome that.

Major reasons why fashion shoppers return their purchases:	How to reduce the number of online store returns:
Receiving the wrong product or the wrong size	Adding customer reviews, clear product photos, descriptions and size charts
Being disappointed in products because of the misalignment of the product description	Showing customers every detail about the fashion items on product pages (what it is, how it feels and how it fits)
Getting damaged or products that contain mistakes	Making sure about the right products and packaging them well with properly sized boxes that can handle them
Delays and problems with the shipment	Optimizing the shipping process with the right carriers to make sure a timely delivery

Introduction
Interesting facts about the fashion e-commerce market
Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store
1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion
Generation Z redefines the future of fashion
Environmental awareness is increasing
How can you serve a better planet?
Interesting facts about sustainability in fashion

Conclusion
2022 is a critical year for fashion retailers
About Sendcloud & Nielsen

Some interesting insights about returns

58% **of online shoppers tend to return their fashion items**

This percentages is significantly higher than for other product categories like food, drinks and sports products.

64% **of fashion shoppers have high expectations regarding free returns**

They think online retailers should arrange and pay for the return.

47% **of shoppers order more frequently if the store offers free returns**

31% **wouldn't reorder from the same store if they have to arrange the return**

Fashion consumers want to have longer return periods:

42% **state that they wouldn't order if the return period is less than 60 days**

Zalando is a good inspiration in a matter of the return period. Shoppers can return their products within 100 days if they're not satisfied with their orders.

Fashion shoppers prefer taking their package to a drop-off point while consumers from other categories prefer their package to be picked up from their location.

Potential reason could be that fashion items are relatively easy to take to a drop-off location.

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

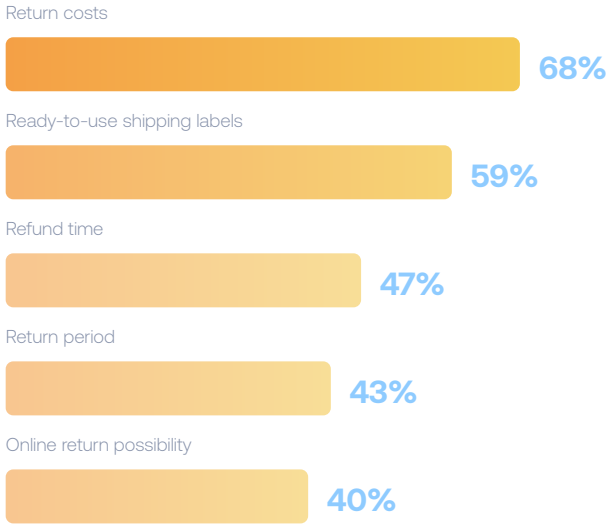
2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

Your return policy can make a big difference

Did you know that 56% of online shoppers check the return policy of a fashion store before purchasing?

Most important elements of a return policy for fashion shoppers



Let's be real!

Having a right to return is a law that's valid within Europe. Because of all the burden of returns, European consumers are not the biggest fans of international stores.

However, China is still the biggest international e-commerce market and fashion shoppers tend to order the most from China. This is very interesting considering the high shipping costs and lack of proper return policies.

As an international online retailer, you can compete by providing a great return policy and boosting your conversions!

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

You can tackle returns with Sendcloud's easy and accessible returning portal:

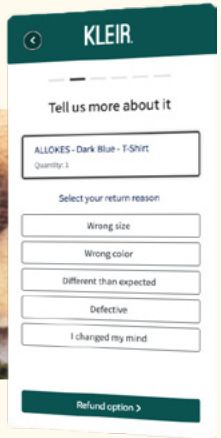
- Offer store credits as an alternative and keep your shoppers happy. They can always exchange their returns and keep coming back.
- Let your customers decide how to return their products. They can return their items at a nearby service point or in-store.
- Decrease customer care questions and send/receive automatically return status updates.
- Build your own return portal so your customers can submit their returns digitally.
- Enjoy analytics dashboards and get insights into what people return.

Get inspired by KLEIR

As a Belgium-based fashion brand, KLEIR makes the return process as simple as possible and decreases the time spent on handling returns.

"To speed up the return process, we created a small application that creates a label in Sendcloud, using the API, and downloads it automatically"

Nick Daelemans



Click to learn how KLEIR is shipping efficiently with Sendcloud. Here you can also see how they simplify the return process.

The future of **e-commerce in fashion**

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

Generation Z redefines the future of fashion

Gen Z defines fashion as a trend that comes and goes so quickly! As an online fashion retailer, you may be wondering how the hell you are going to reach Generation Z.

Well, that's a hell of a job! Because their world is changing so fast, you should cut through the noise with your brand.

Here are some characteristics of your young fashion shoppers:

- They're interested in your brand purpose as they have various product alternatives in fashion.
- Ethical and sustainable fashion matters for them.
- Unlike millennials they don't care about luxury brand tags.
- Uniqueness is in their DNA.
- They break gender rules with street-style and oversized clothes.
- They love athleisure clothing (in a stylish way).
- They prefer budget-friendly brands.
- They shop across channels and they get inspired by their social feeds.
- They're the biggest fan of buy-now and pay-later solutions.

Some advice

Don't be one of the retailers that sell fashion items. You can do so much better. Build your brand, create your story and connect personalities to it. That's how you can gain more loyal fans.

Be mindful of your environmental impact and build your brand values around it. Implement green delivery methods and rethink your packaging strategy starting from today.

Always look for new ways to surprise your customers. Be on the channels they're spending their most time on, offer extra tracking possibilities and be creative with your campaigns.

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

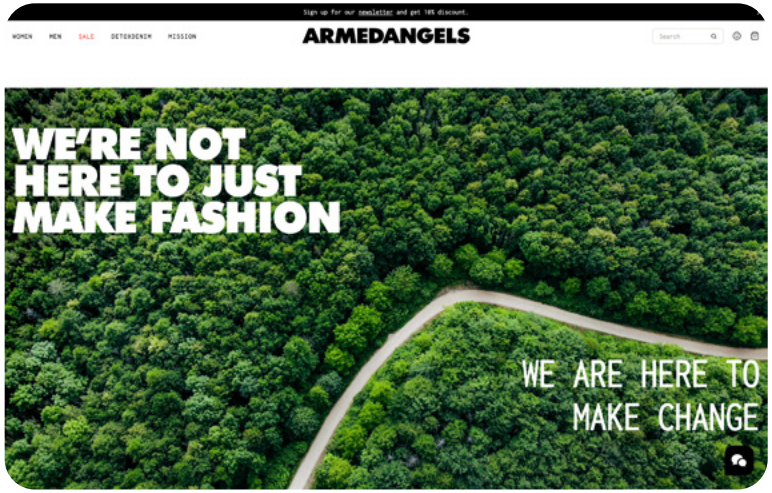
About Sendcloud & Nielsen

Environmental awareness is increasing

The global pandemic made it crystal clear that e-commerce is producing a lot of carbon emissions.

Therefore the key differentiator between brands in 2022 will be the impact of their delivery on the environment.

If you want to make sure consumers end up in your store and keep coming to buy your fashion products, it's time to address more sustainable services.



© Marco Okhuizen

Some inspiration on green delivery

As an innovative logistics company, Budbee offers last-mile delivery services to transport parcels.

They offer a 100% fossil-free delivery service and they deliver the parcels in an environmental-friendly way. Seems like they'll keep doing some cool stuff for a better planet.

If you ever want to activate Budbee as your green logistics solution, don't forget to take advantage of Sendcloud's partnership regarding the shipping rates.

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

How can you serve a better planet?

By providing eco-friendly packaging

- ✓ You can choose reusable or biodegradable materials.
- ✓ You'll prevent a high level of environmental waste.
- ✓ You'll cut carbon emissions and generate far less waste.

By providing green shipping

- ✓ You'll contribute to reducing the global carbon emissions.
- ✓ You'll minimize your budget with fewer packing materials.
- ✓ You'll retain loyal customers.

Introduction
Interesting facts about the fashion e-commerce market
Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store
1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion
Generation Z redefines the future of fashion
Environmental awareness is increasing
How can you serve a better planet?
Interesting facts about sustainability in fashion

Conclusion
2022 is a critical year for fashion retailers
About Sendcloud & Nielsen

Interesting facts about sustainability in fashion

54% **thinks the rise of online shopping (including shipping/returning packages) is a problem for the environment**

70% **believes that online fashion stores often use too many packaging materials to ship their orders**

80% **thinks that the packaging materials of products ordered online should be fully recyclable**

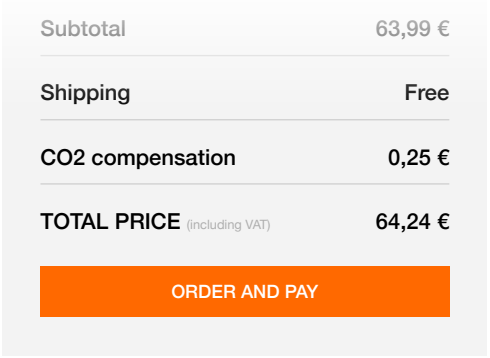
61% **expects fashion online stores to offer green (CO2 neutral) delivery methods**

54% **is willing to wait longer for an order if this is more sustainable for less CO2 emission**

Get inspired by Zalando

The leading European fashion platform Zalando aims to reduce its operational carbon emissions by 80% by 2025!

- Through their fulfillment solutions, they own the fulfillment, delivery and returns process.
- Through their eco-friendly last-mile delivery, they reduce the carbon footprint of transportation.
- In all its markets, Zalando improves first-time delivery through initiatives like PUDOs (pick-up, drop-off points).
- They deliver packages between 5 and 10 pm with cargo bikes.
- Their shipping packages are 100% recycled.
- They offer an option within the checkout to let consumers pay for reducing the CO2 emission:



Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

Carriers are driving green logistics forward

How cool is it that delivery companies are developing innovative solutions in green logistics to reduce carbon emissions globally.

Here are some exciting examples:

- ✔ They launch smart tools to measure and reduce emissions.
- ✔ They use right-sized shipment packaging.
- ✔ They operate trucks powered by liquefied natural gas.
- ✔ They provide smart route planning to eliminate mileage excess.
- ✔ They optimize the supply chain for all package collections and deliveries.
- ✔ They execute alternative fueling and advanced technology fleets.

It's worth mentioning that a lot of delivery companies tackle the environmental impact and launch impressive programs for green delivery these days.

More about carriers' green delivery programs

To understand more about their green logistics programs, you may want to check them in detail.

Here you can see the best carriers Sendcloud partners with.

Conclusion
and final tips for fashion retailers

Introduction

Interesting facts about the fashion e-commerce market

Findings of European shoppers and their buying behaviors

Unlocking the keys to the conversion of your fashion online store

1. Build your brand, brand, brand!
2. Make the shopping experience easy for your customers
3. Offer a shipment tracking system
4. Offer flexible delivery
5. Improve the checkout experience
6. Focus on retaining your customers
7. Provide the holy grail of e-commerce: shipping!
8. Inform about your delivery options ASAP
9. Don't let returns hold you back from scaling

The future of e-commerce in fashion

Generation Z redefines the future of fashion

Environmental awareness is increasing

How can you serve a better planet?

Interesting facts about sustainability in fashion

Conclusion

2022 is a critical year for fashion retailers

About Sendcloud & Nielsen

2022 is a critical year for fashion retailers

There is one thing certain that the global pandemic caused a shift in the way people purchase their fashion items.

And e-commerce became a big part of it.

To survive in this competitive environment, make sure to elaborate your strategy upon sustainability as this will determine the future of fashion brands.

Next to that, expanding your customer base will be the key driver for stable growth in 2022 and beyond. That's a hell of a job!

Keep in mind that big players will keep making a lot of noise and that'll lead to more competition for both brick-and-mortar and online stores.

Don't forget to redefine your brand values, build an online presence and go green to meet your customer's expectations.

Take advantage of the latest trends and claim your position within this red ocean.

Lastly, don't forget to be proud of yourself and embrace how far you come for your business!

Reading recommendation

Do you have a brand that sells cross-border? Check out the latest E-commerce Delivery Compass. It brings a new understanding of e-commerce logistics, international shipping and future trends within various industries to help you boost your conversions.

Download the research report

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About Sendcloud & Nielsen

sendcloud

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Ship Smarter, Ship Faster, Ship Sendcloud

In 2011, three Dutch founder's of an online store were in a bar complaining that shipping was expensive, time-consuming, and stunted growth. They spent weeks looking for a viable solution and found nothing. Rather than accept the situation, they decided to build their own. And thus Sendcloud was founded.

Sendcloud is an all-round shipping platform for online businesses that connects to 85+ shop systems and delivery companies. As one of the fastest-growing tech companies in Europe, the company is on a mission to make shipping as scalable as possible for every company.

With over 23,000 customers, integrations with over 50 e-commerce systems, and over 80 international delivery companies, Sendcloud is the leading shipping solution in Europe and soon, the universe.

For more information, visit www.sendcloud.com

Nielsen: Audience is Everything™

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Their approach marries proprietary Nielsen data with other data sources to help clients around the world understand what is happening now, what is happening next, and how to best act on this knowledge. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population.

For more information, visit www.nielsen.com

Implement the key findings from this study yourself.

Want to be on top of the shipping game and offer the best shipping experience to your customers? Get started with Sendcloud for free and discover how you can save time and costs on logistics while offering your customers the best shipping and return solutions.

Create my free account today

Questions?

For more information about this study, reach out to marketing@sendcloud.com

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