



# AnalyticaA Online Fashion Panel

Traffic, Device & Geo Report Q2 2017

# Data sources

Google Analytics data from our fashion research panel. Percentage values to even out different shop traffic volumes.

Statistical outliers are noted, if applicable, and removed from the panel's values.



## The Panel – a representative sample of

- Fashion online shops, active in the German market
- Mono-label or brand flagship online shops
- Average yearly revenue of € 300,000 – € 10,000,000 per shop
- Target group distribution of female : male ~ 55 : 45

## Aim of this analysis

To provide average comparison values for the mono-label online fashion industry in Germany.



# **AnalyticaA Online Fashion Panel Traffic Report Q2 2017**

The Fashion Panel's Top 3

# What channels are a 'must have' for a mono-label fashion shop?



## Paid Search is most important

Every panel member uses Google AdWords and Bing ads in Germany. If you want to be successful as a mono-label fashion shop: do it.



## Organic Search

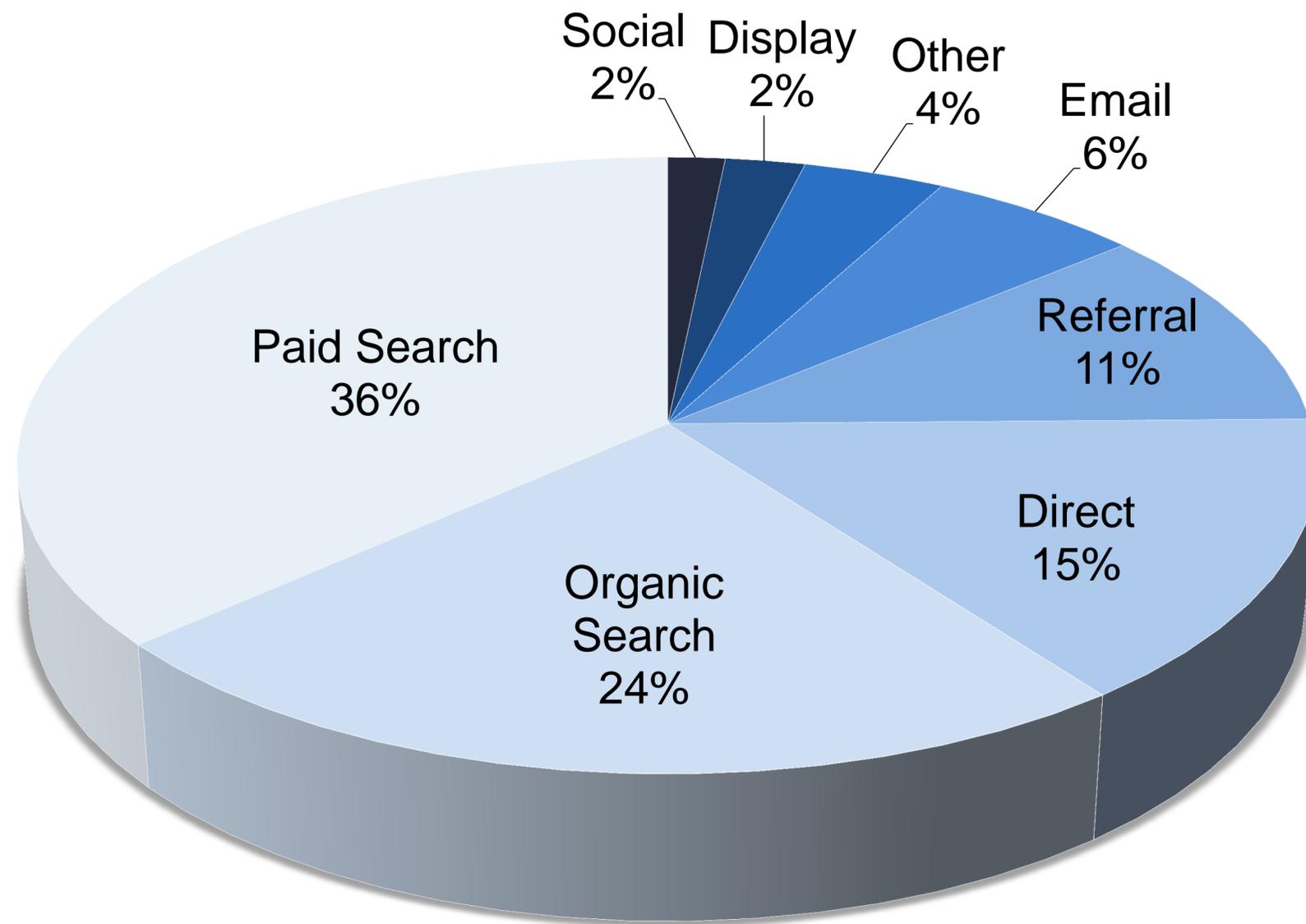
It's the second biggest traffic source. Optimize your content and shop tech for SEO, as every percent of SEO traffic frees up budget for paid channels or profit.



## Email

The third most successful channel is email marketing. Have your own 'as big as possible' client-email-list and send them offers at least twice a month. The most successful panel member does 40% of his volume with his own mailing list – which makes his email channel number two in sales (before SEO) and it is by far the best channel regarding ROI. You just need manpower and good promotions.

# Traffic Sources Q2 2017



Most Traffic:

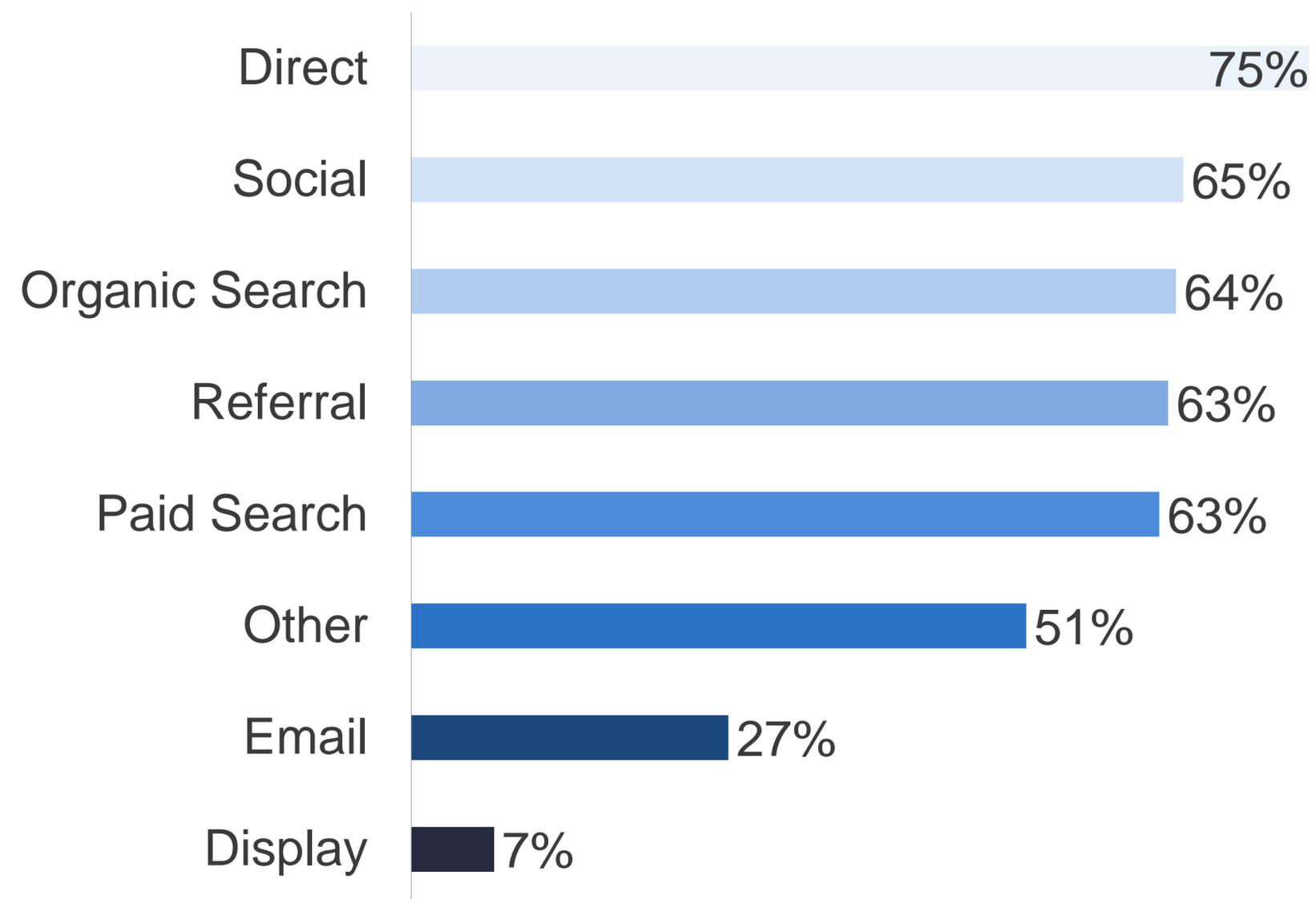
Paid Search

Least Traffic:

Social and Display

# New Shop Sessions

by Channel Q2 2017



Most new sessions:

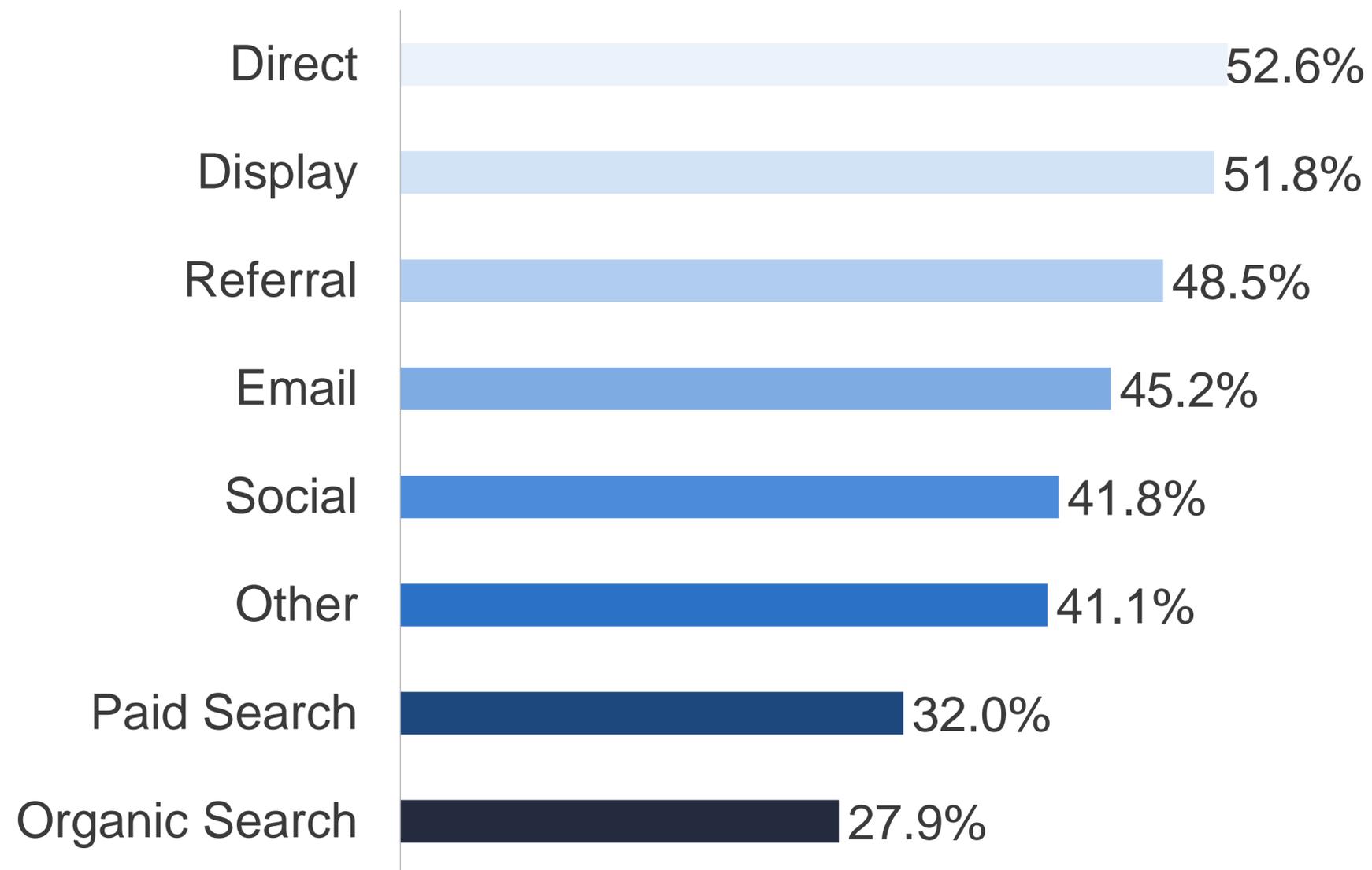
Direct

Least new sessions:

Display (mostly retargeting) and email

# Shop Visitor Bounces

by channel Q2 2017

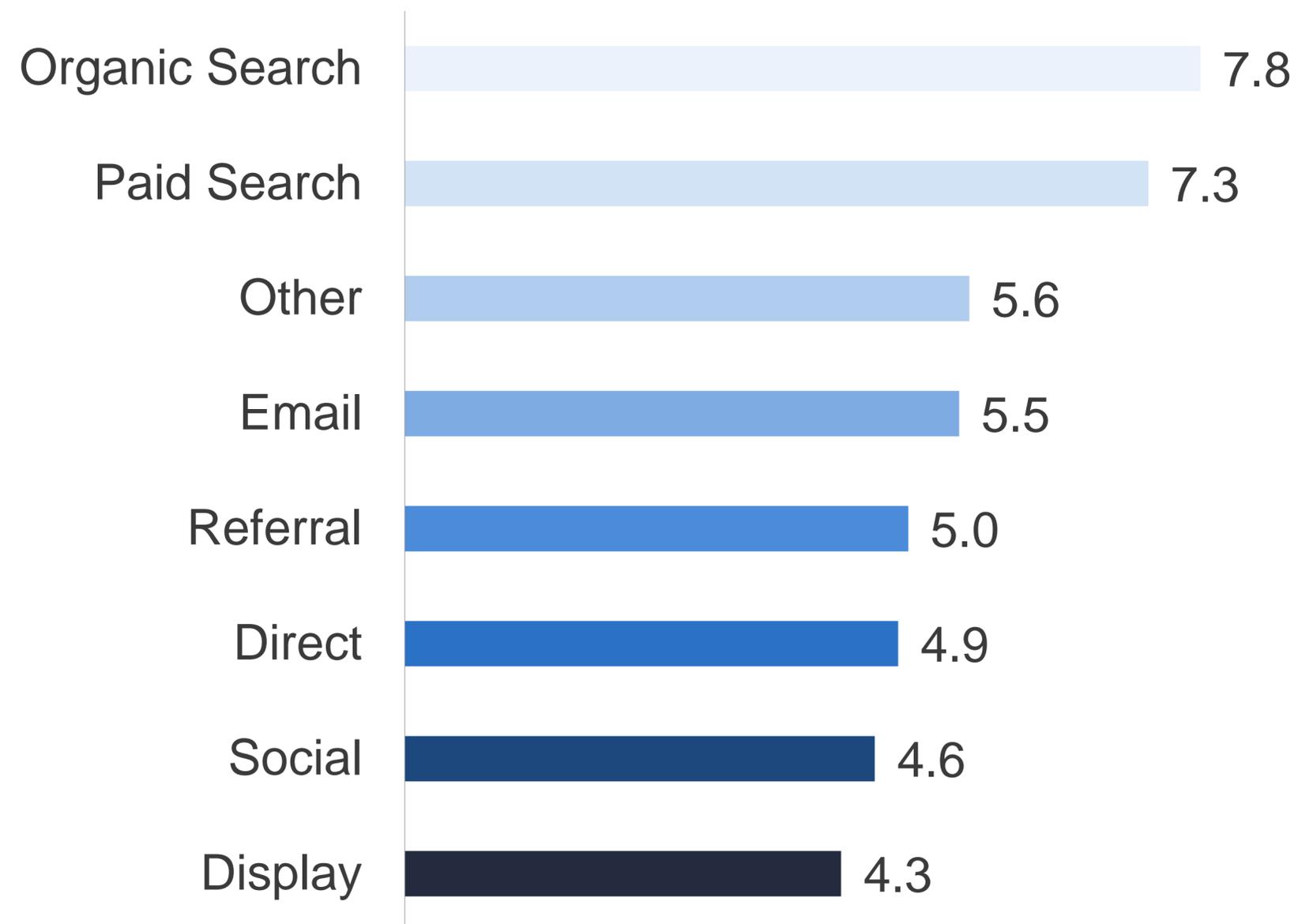


In Q2 more than half of the visitors coming through direct or display tend to leave after only looking at one page.

More than two thirds of the visitors coming through the traffic channel organic search visit more than one page.

# Visited Pages

per Session Q2 2017

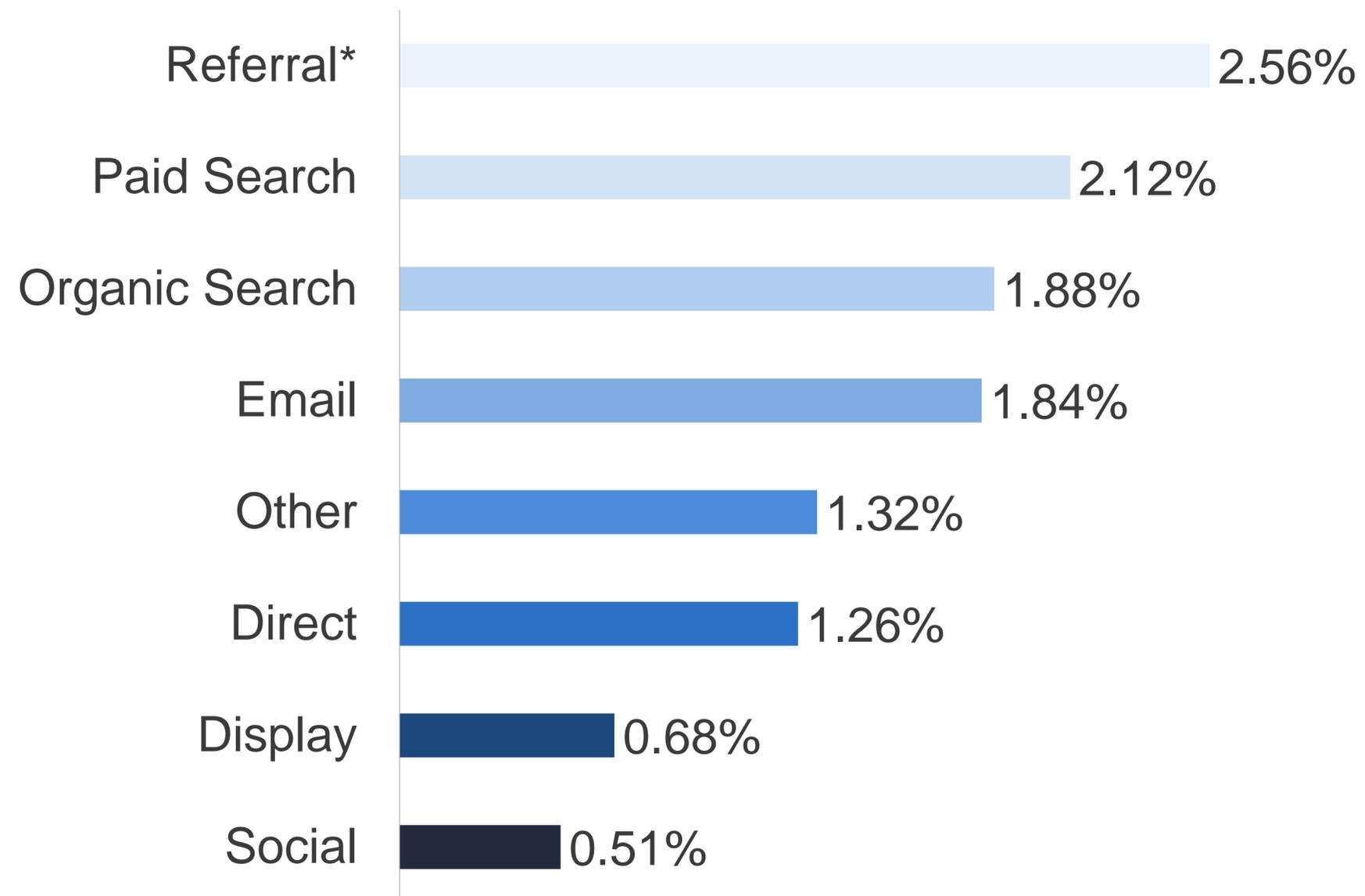


Not only the bounce rate is lowest for paid and organic search traffic, those traffic channels also have the best average 'visited pages per session' values.

Accordingly, the low number of visited pages per session for direct and display can be seen in relation to their high bounce rate.

# Conversion Rate

per Channel Q2 2017



\*Referral contains non filtered redirects in some panel cases and is thus not an average market value.

# Key findings traffic report Q2 2017



## Paid Search is most important

With 36% of all traffic, a low bounce rate of 32.0%, a conversion rate of 2.12% and 45% of the overall sales volume, it is obvious that paid search it is the most important traffic channel for the online shops of the fashion panel. Compared to Q1, paid search lost 5% traffic share and increased its conversion rate by +0,26%.



## Organic Search

The SEO traffic is stable with 24% traffic share, it has the lowest bounce rate of 27.9% and the highest number of averagely visited pages per session (7.82). The conversion rate of 1.88% has increased compared to Q4 (1.51%) and Q1 (1.57%) and its high importance can also be seen in the 23% share of overall sales volume.



## Email

could not keep up with the positive trend of paid and organic search especially when looking at the conversion rate, since it dropped from 1.96% to 1.84%. The bounce rate rose from 35% to 45% and the averagely visited pages per session dropped from 6.5 to 5.5. It has a stable share of 6% as traffic source and a share of 7% of the overall sales volume.



## Direct traffic

has a stable level of 15% traffic share, most new shop sessions of 75%, the highest bounce rate of 52.6% and a share of the overall sales volume of 9%. Compared to Q1, the averagely visited pages per session decreased from 5.5 to 4.9 and the conversion rate dropped from 1.38% to 1.26%.



# AnalyticaA Online Fashion Panel Device Report Q2 2017

# Fashion shoppers use **Apple and Samsung** devices



## Target these device brands

and reach 76% of your top potential mobile clients. Apple and Samsung are more expensive brands – which probably means those users have more budget to spend on fashion. Hint: Often they are also ‘fans’ of Apple or Samsung, e.g. on facebook.



## Compared to the market share

Samsung has a market share of 20-23% and Apple 12-15% in Germany in 2017 - depending on which current statistic you take a look at.

Set this relation to the above numbers:

Samsung and Apple Users are very interested in fashion.

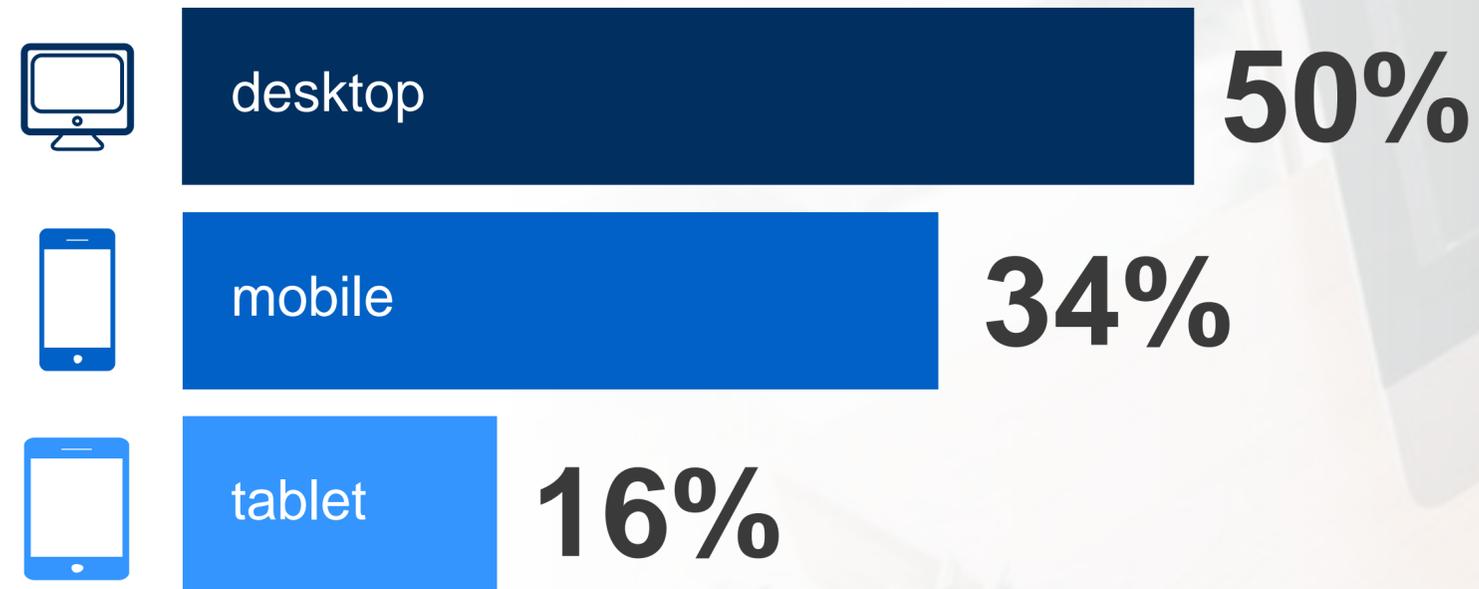


## Optimize for Apple and Samsung devices

When you optimize your shop for mobile devices, these two brands are especially important. Ask your development partner to take special care for the optimization for Apple and Samsung mobile phones as well as tablets.

# Traffic Sources by Device

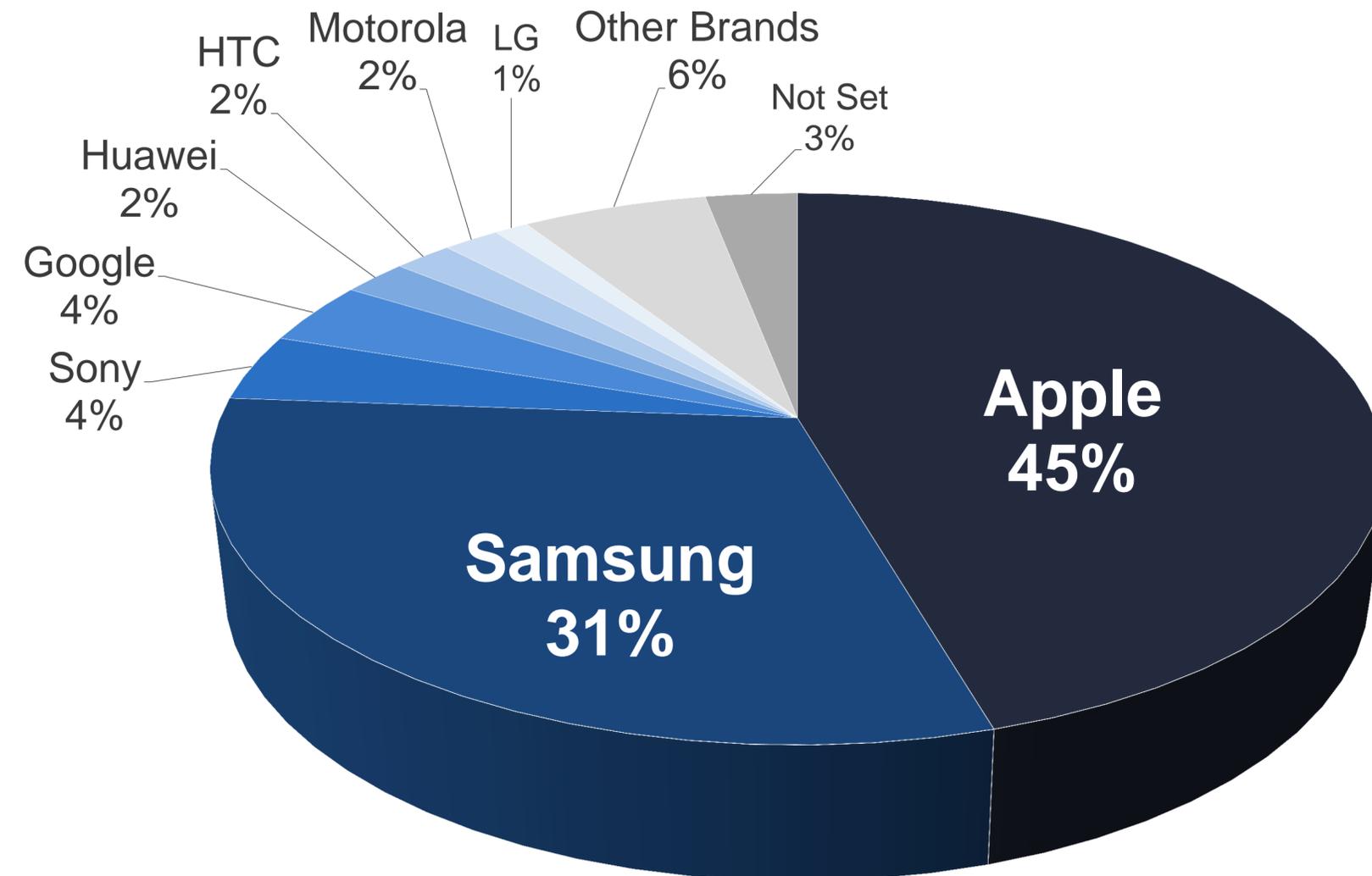
Q2 2017



- Every third online shop visitor uses a mobile device
- Half of all panel shop traffic comes from desktop devices
- Compared to Q1 the division of the traffic sources by device is almost similar. The only slight change is the increase of the mobile share by +1% and the decrease of the tablet share by -1%.

# Mobile Device Traffic by Brand

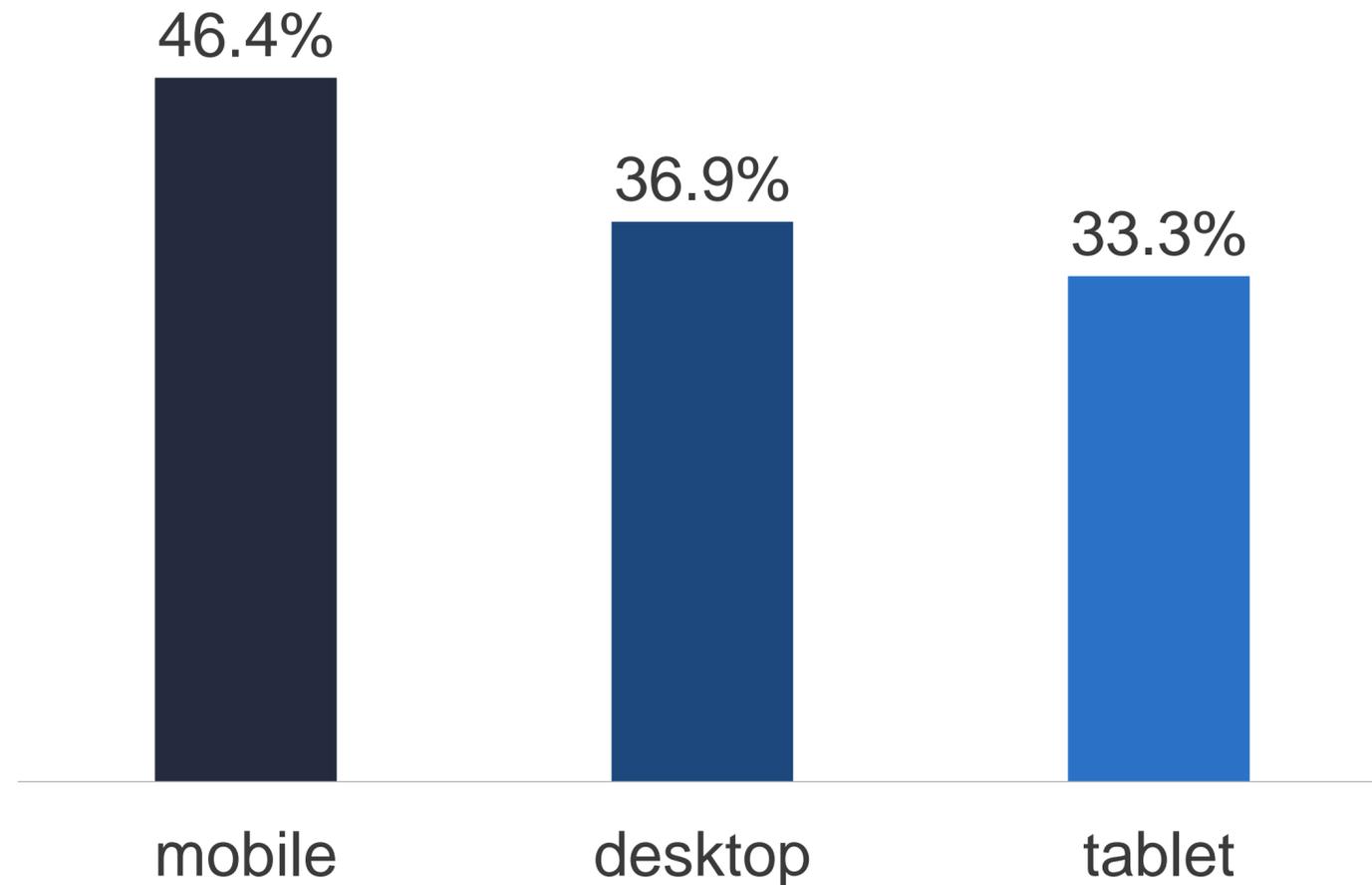
Q2 2017



**‘Other Brands’** is an accumulated value of 6% traffic share which consists to those brands having less than 1% share on the overall mobile device traffic. Those brands include Acer, OnePlus, Microsoft, Lenovo, Nokia, Medion, Amazon, Xiaomi, Feiteng, Cynus, Asus and Black Berry.

# Shop Visitor Bounces by Device

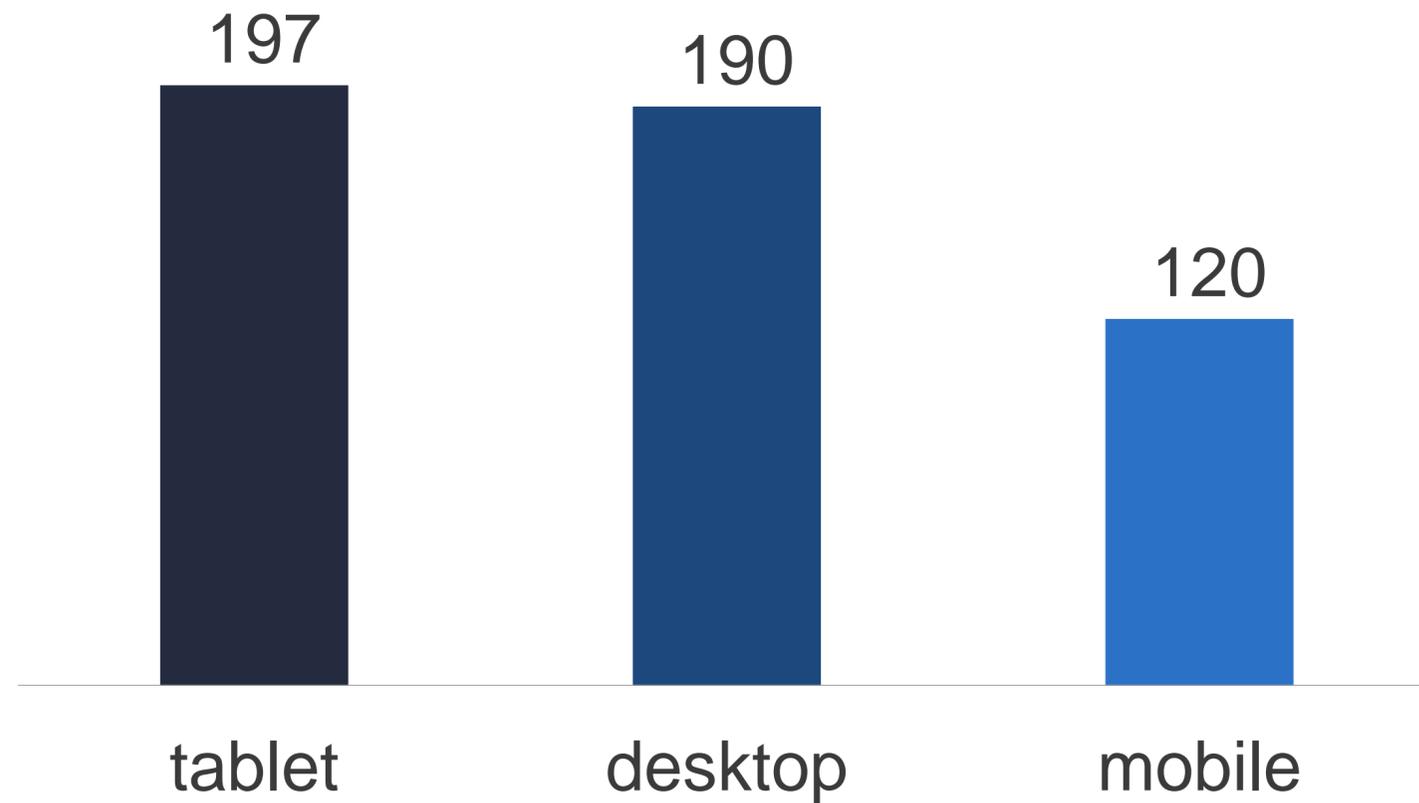
Q2 2017



- There is a vast difference of the mobile bounces in comparison to the bounces of desktop and tablet traffic.
- With 46.4% almost every second mobile visitor leaves the shop without looking at a second page.
- Compared to Q1 the shop visitor bounces for desktop traffic deteriorated by 3.3% (+10%), the tablet bounces are almost on the same level with a small increase by +0.7% (+2.1%) and the mobile bounces are also almost the same with a slight change by +0.15%.

# Average Session Duration in seconds by Device

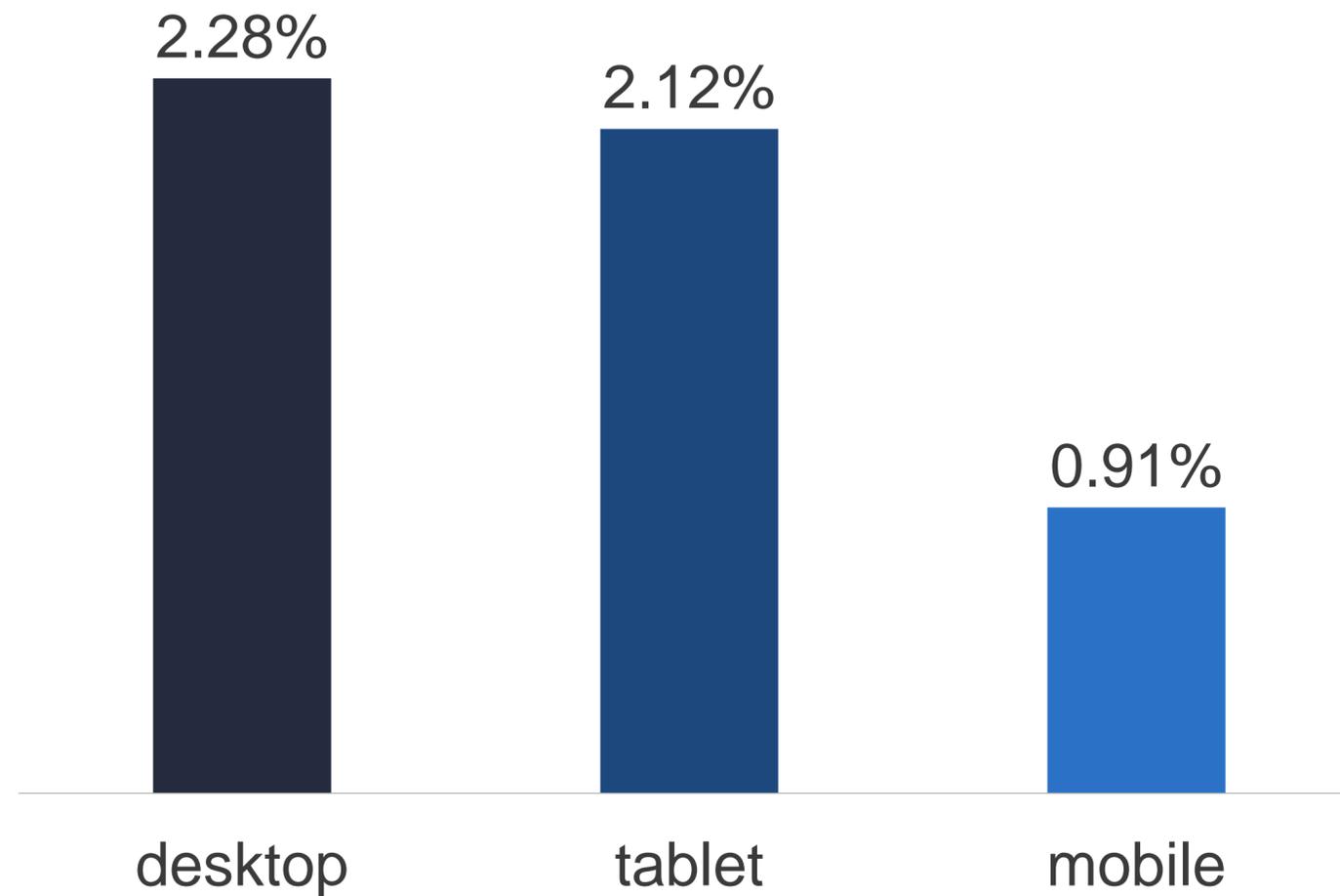
Q2 2017



- By comparing the average session duration, mobile loses against tablet and desktop by more than a minute.
- With more than 3 minutes of average session duration the tablet device is the clear winner.
- Compared to Q1 the overall session duration decreased slightly by a few seconds on all devices.

# Average Conversion Rate by Device

Q2 2017



- Looking at the average conversion rate by device, there is a big gap between mobile to desktop and tablet. The mobile conversion rate is over 50% lower than desktop and tablet devices.
- In comparison to Q1, there is a positive trend of the conversion rates for all devices: desktop by +0.15%, tablet by +0.31, mobile by +0.13%.

# Key Findings of the Device Report

Q2 2017

- **Desktop devices are still the most important ones: they have the highest traffic share of 50%**, an average session duration of 190 seconds and it's the device with the best conversion rate of 2.28%. Compared to Q1 the shop bounces increased from 33.6% to 36.9% in Q2.
- **Tablet devices have a stable traffic share of 16%, the lowest Bounce Rate of 33.31% and the longest average session duration of 197 seconds.**  
In comparison to Q1, the conversion rate shows a positive progress for tablet devices as it rose from 1.81% to 2.12% and is almost on the same level as the conversion rate for desktop devices.



**The Device Report analysis of the second quarter 2017** shows in general very similar numbers and insights as the report for the first quarter 2017

Like in Q1, mobile devices have a high traffic share of a third in Q2, but in relation to that traffic share the remaining performance is on a much lower level: highest bounce rate, lowest average session duration and a poor conversion rate. But at least for the conversion rate there is a positive trend since it improved from 0.78% in Q1 to 0.91% in Q2 – a result of another three panel members taking measures for mobile improvement.



# **AnalyticaA Online Fashion Panel Geo Report Q2 2017**

## Session Share by federal state



# Top 50 towns in Germany by Session Share

| Town            | Avg. Session Share |       | Avg. Bounce Rate | Avg. Pages per Session | Avg. Conversion Rate |
|-----------------|--------------------|-------|------------------|------------------------|----------------------|
|                 | Q2                 | Q1    |                  |                        |                      |
| Munich          | 8,88%              | 7,35% | 41,40%           | 5,61                   | 1,37%                |
| Berlin          | 5,92%              | 6,99% | 37,73%           | 6,21                   | 1,88%                |
| Cologne         | 5,41%              | 3,29% | 35,29%           | 6,08                   | 1,59%                |
| Hamburg         | 4,49%              | 4,01% | 38,65%           | 5,67                   | 1,88%                |
| Frankfurt       | 2,19%              | 2,51% | 34,92%           | 6,03                   | 1,60%                |
| Nuremberg       | 1,61%              | 1,84% | 28,88%           | 8,13                   | 3,53%                |
| Stuttgart       | 1,57%              | 1,20% | 34,80%           | 5,96                   | 1,32%                |
| Dusseldorf      | 1,25%              | 1,45% | 36,15%           | 6,44                   | 1,91%                |
| Dortmund        | 1,03%              | 1,20% | 40,34%           | 6,20                   | 2,71%                |
| Essen           | 0,88%              | 0,90% | 36,24%           | 7,43                   | 1,92%                |
| Halle (Saale)   | 0,75%              | 0,99% | 24,25%           | 6,83                   | 6,25%                |
| Dresden         | 0,74%              | 1,06% | 34,39%           | 6,38                   | 2,38%                |
| Hanover         | 0,71%              | 0,95% | 35,65%           | 5,98                   | 2,23%                |
| Augsburg        | 0,70%              | 0,64% | 30,74%           | 7,45                   | 2,03%                |
| Karlsruhe       | 0,68%              | 0,58% | 30,47%           | 6,42                   | 2,04%                |
| Leipzig         | 0,63%              | 0,78% | 37,59%           | 5,98                   | 1,28%                |
| Passau          | 0,61%              | 0,50% | 34,71%           | 6,87                   | 1,19%                |
| Osnabruck       | 0,58%              | 0,60% | 29,82%           | 7,84                   | 0,69%                |
| Regensburg      | 0,58%              | 0,59% | 35,71%           | 7,29                   | 2,84%                |
| Bonn            | 0,54%              | 0,48% | 23,50%           | 7,28                   | 2,64%                |
| Bochum          | 0,50%              | 0,48% | 28,30%           | 6,76                   | 1,93%                |
| Munster         | 0,49%              | 0,29% | 31,01%           | 7,13                   | 2,61%                |
| Bremen          | 0,49%              | 0,61% | 32,97%           | 7,86                   | 3,01%                |
| Bayreuth        | 0,49%              | 0,31% | 30,60%           | 6,86                   | 0,80%                |
| Kassel          | 0,44%              | 0,48% | 40,30%           | 5,92                   | 0,86%                |
| Wurzburg        | 0,44%              | 0,39% | 28,08%           | 6,90                   | 1,38%                |
| Duisburg        | 0,44%              | 0,47% | 26,80%           | 7,35                   | 2,23%                |
| Freiburg        | 0,42%              | 0,40% | 42,65%           | 4,59                   | 0,32%                |
| Weiden          | 0,39%              | 0,29% | 22,70%           | 7,14                   | 2,13%                |
| Wiesbaden       | 0,39%              | 0,34% | 28,01%           | 7,89                   | 1,64%                |
| Oldenburg       | 0,39%              | 0,45% | 33,90%           | 6,56                   | 2,06%                |
| Mainz           | 0,37%              | 0,33% | 30,77%           | 7,72                   | 2,22%                |
| Aachen          | 0,36%              | 0,36% | 30,94%           | 6,47                   | 1,17%                |
| Wuppertal       | 0,34%              | 0,32% | 34,69%           | 7,10                   | 3,44%                |
| Kiel            | 0,34%              | 0,40% | 36,89%           | 8,24                   | 2,13%                |
| Erlangen        | 0,33%              | 0,29% | 28,21%           | 7,83                   | 1,20%                |
| Brunswick       | 0,33%              | 0,42% | 33,97%           | 7,27                   | 3,53%                |
| Monchengladbach | 0,31%              | 0,36% | 33,00%           | 5,44                   | 0,76%                |
| Trier           | 0,31%              | 0,33% | 24,73%           | 13,45                  | 2,15%                |
| Magdeburg       | 0,31%              | 0,30% | 23,25%           | 6,76                   | 1,49%                |
| Landshut        | 0,30%              | 0,11% | 32,16%           | 7,14                   | 0,32%                |
| Mannheim        | 0,30%              | 0,59% | 26,95%           | 7,16                   | 1,29%                |
| Bielefeld       | 0,30%              | 0,52% | 37,43%           | 5,46                   | 0,67%                |
| Krefeld         | 0,29%              | 0,26% | 35,46%           | 7,93                   | 2,63%                |
| Darmstadt       | 0,29%              | 0,28% | 26,84%           | 7,77                   | 3,48%                |
| Koblenz         | 0,28%              | 0,21% | 30,92%           | 9,28                   | 2,32%                |
| Vechta          | 0,28%              | 0,17% | 18,02%           | 8,24                   | 4,73%                |
| Ingolstadt      | 0,28%              | 0,36% | 17,65%           | 10,88                  | 6,74%                |
| Bamberg         | 0,26%              | 0,18% | 28,64%           | 6,62                   | 0,64%                |
| Chemnitz        | 0,25%              | 0,39% | 35,72%           | 7,28                   | 1,19%                |



## The Fashion Panel's Top 3

These are your  
**'must have'**  
states and cities  
in Germany.

### ▶ **Be present in these states**

Bavaria, North Rhine-Westphalia and Baden-Wuerttemberg. More than 50% of the fashion panel's traffic comes from those three states.

### ▶ **Be especially present in these cities**

Munich, Berlin, Cologne, Hamburg, Frankfurt. They averagely have around 27% of the total traffic. Also be especially present in areas close to your own most important locations and wherever you are well known (check your Google Analytics geo data!).

### ▶ **Use geo targeting**

To become more efficient in your advertising. For example you can use location bid adjustments in Google AdWords – ask your agency – or us.

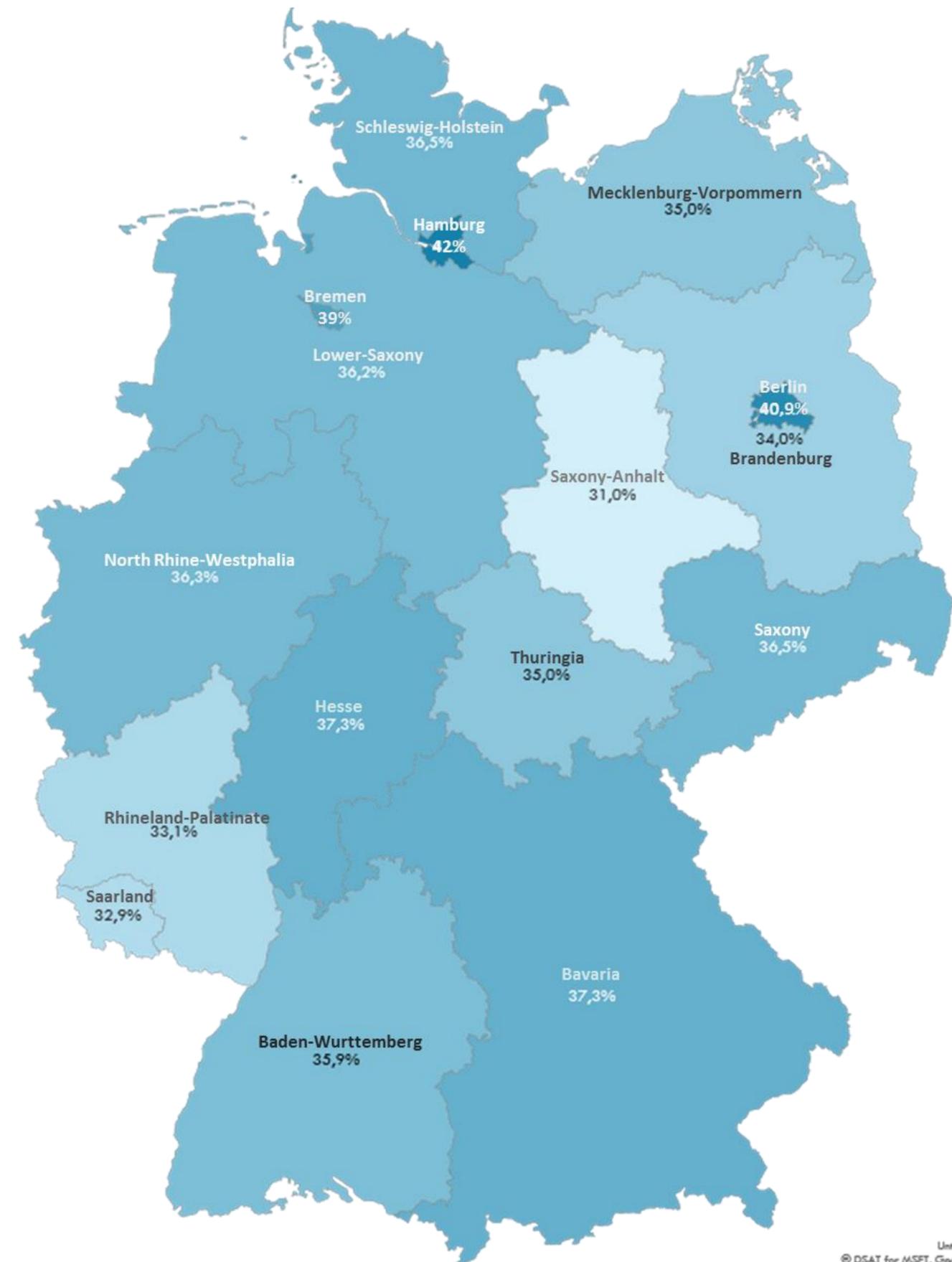
# Average Bounce Rate by federal state

Average bounce rate



31%

42%



# Average pages per session By Federal State

Average pages per session



## Average Conversion Rate By Federal State

Average conversion rate



# Key Findings of the Geo Report

Q2 2017

Only 0.9% of all users have chosen to anonymize their geo location tracking (=not set) which is an even lower number than in Q1 (1.1%). Therefore geo targeting via Google's platforms is very accurate in Germany.

- 59.2% of all shop sessions come from only three of Germany's federal states:
  - ✓ **24.8% Bavaria**  
15.6% of the German population\*
  - ✓ **21.7% North Rhine-Westphalia**  
21.7% of the German population\*
  - ✓ **Baden-Wuerttemberg 12.6%**  
13.2% of the German population\*

- In Q2 the cities with the highest average session share are Munich (8.88%), Berlin (5.92%) and Cologne (5.41%). The two top cities are the same ones as in Q1, but in Q2 there was a change regarding the third place, since Cologne has a higher average session share than Hamburg in Q2.
- Comparing the average viewed pages per session from Q2 to Q1, the numbers are very similar in all federal states and there are no statistical outliers to be noted.
- As in Q1, for Q2 there is a visible trend for higher conversion rates in the eastern federal states: the 3 federal states with the highest conversion rates are Saxony-Anhalt (4.00%), Mecklenburg-Vorpommern (2.72%) and Saxony (2.7%). The lowest conversion rates occurred in Saarland (1.68%) and Bremen (1.53%).

\* Census Germany 2011



More Information about the Digital Fashion Industry  
of Germany & the EU

## Contact the AnalyticaA research team



Call us  
+49 89 381 53 53 50



Write us  
[fashionpanel@AnalyticaA.com](mailto:fashionpanel@AnalyticaA.com)



Visit our website  
[www.AnalyticaA.com](http://www.AnalyticaA.com)

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