



AnalyticaA Online Fashion Panel

Traffic, Device & Geo Report Q3 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

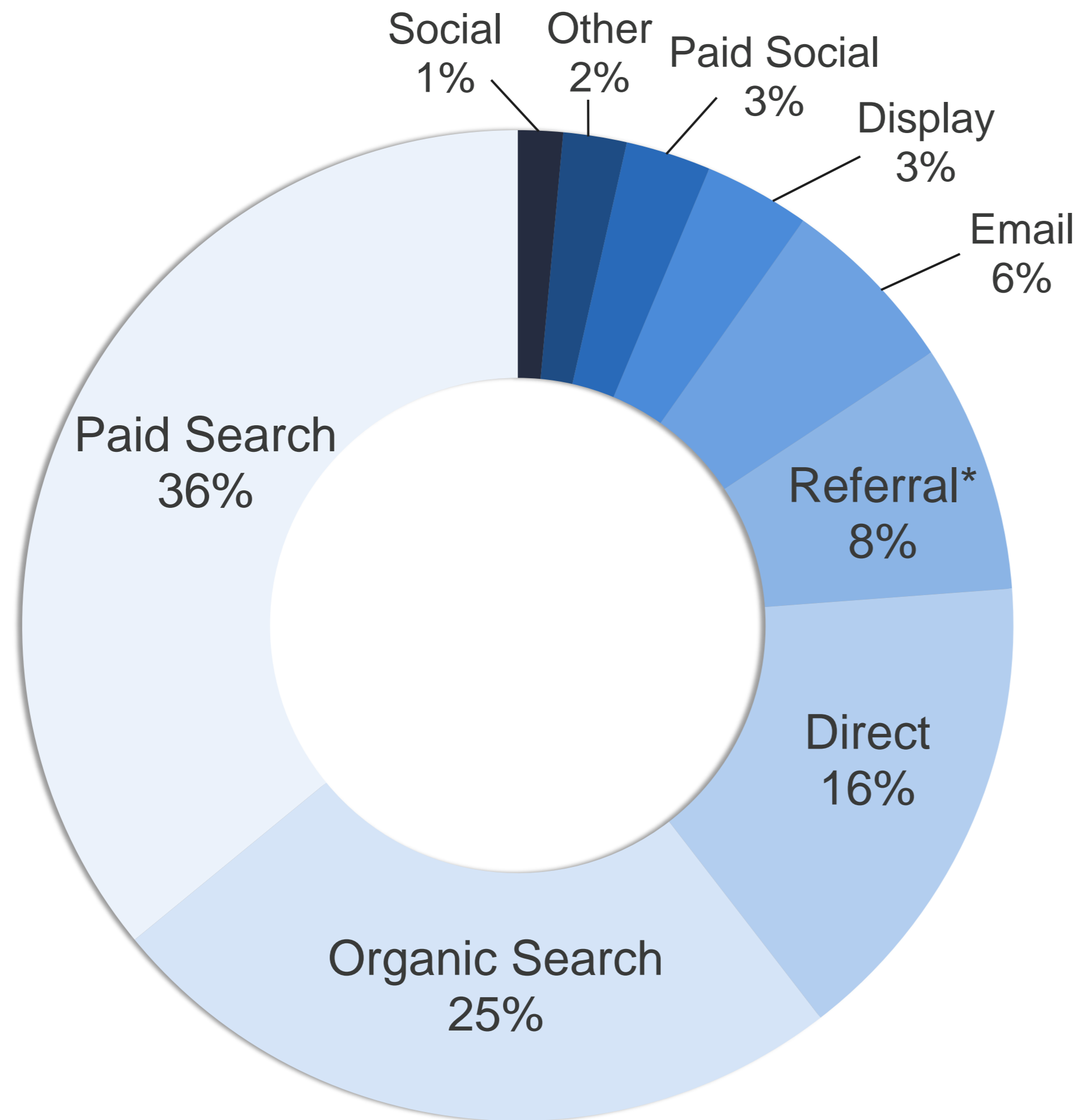
Aim of this analysis

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



AnalyticaA Online Fashion Panel Traffic Report Q3 2017

Traffic Sources Q3 2017



Most traffic:

Paid Search

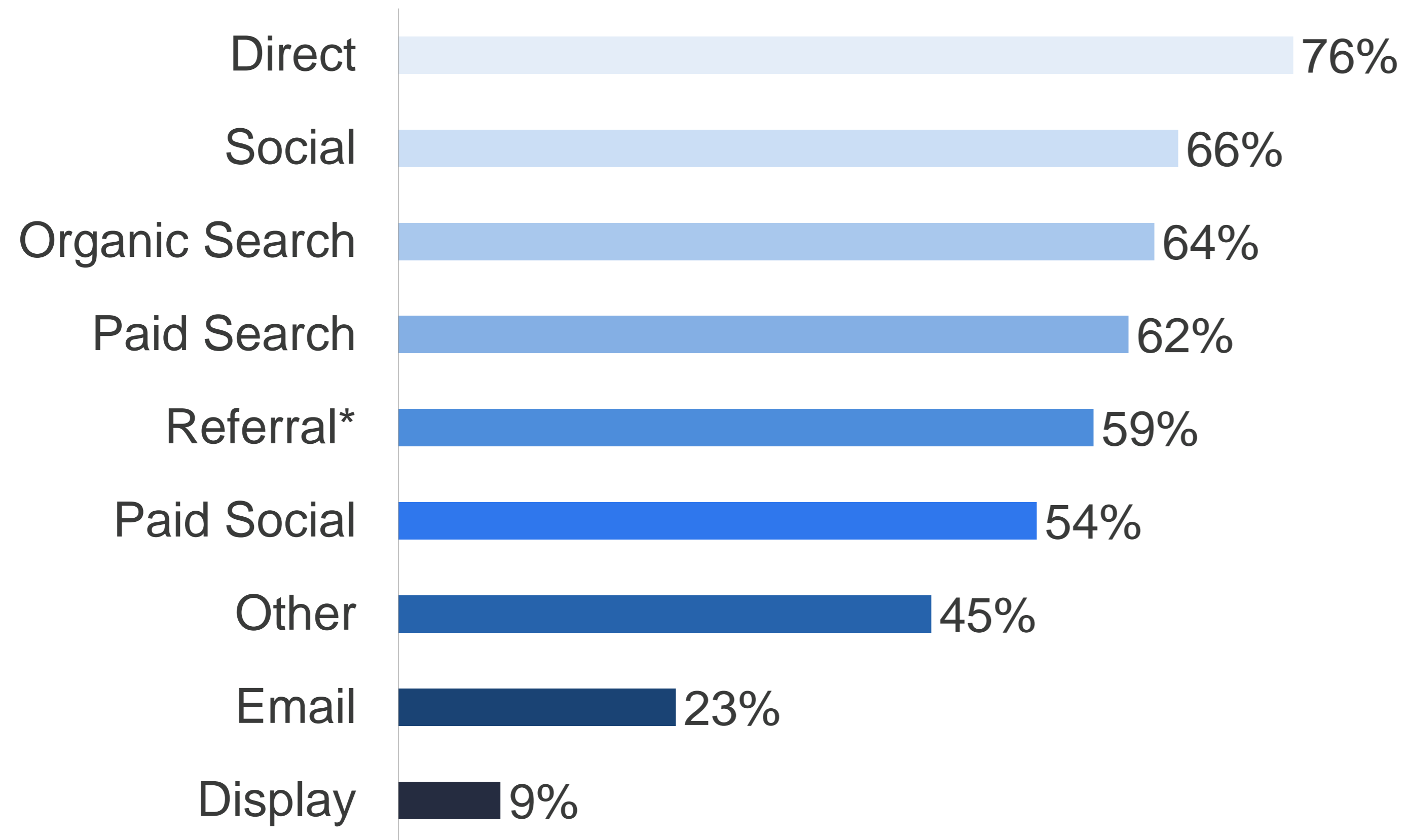
Least traffic:

Social

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

New Shop Sessions

by channel Q3 2017



Most new sessions:

Direct

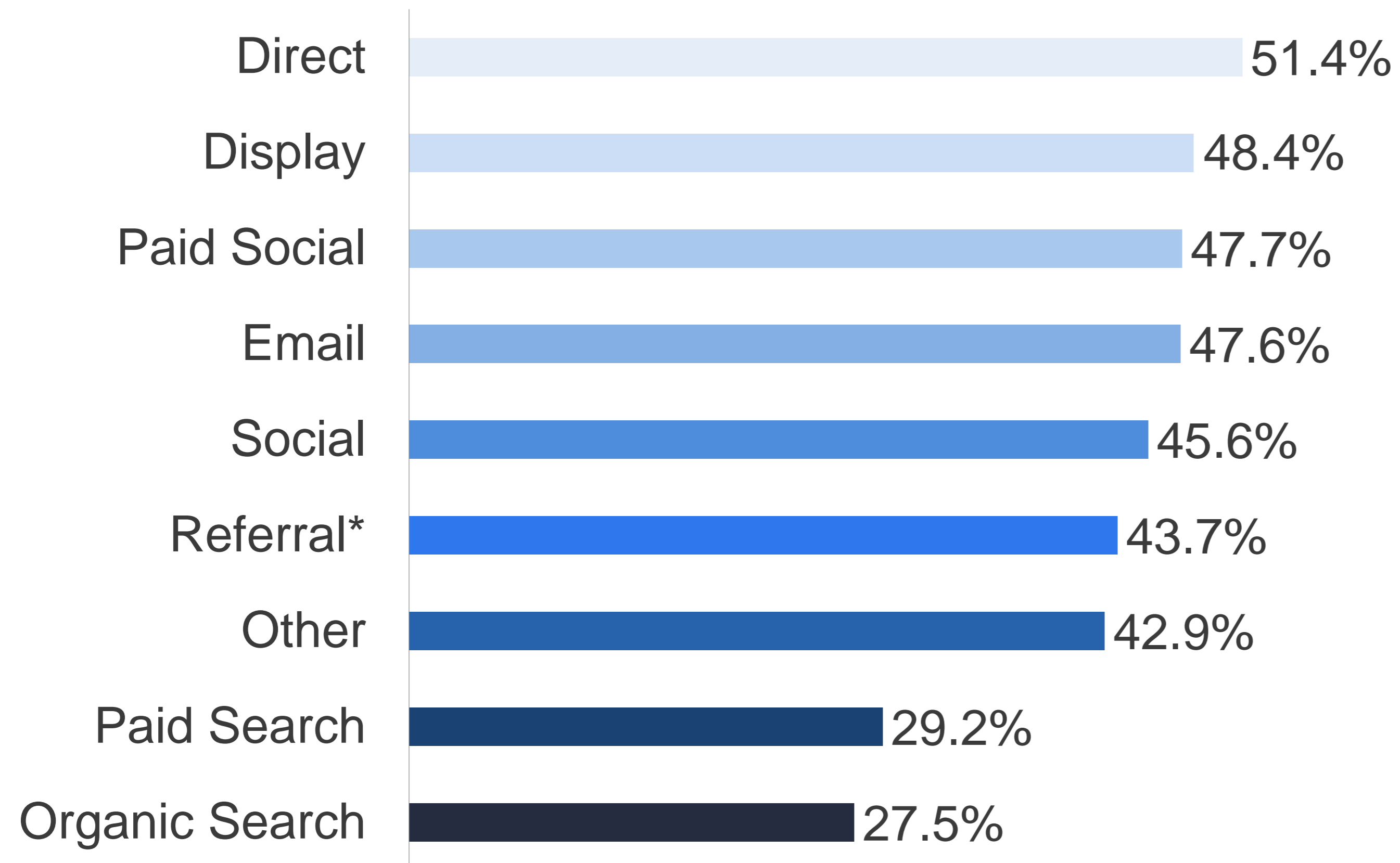
Least new sessions:

Display (mostly retargeting)
& Email

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

Shop Visitor Bounces

by channel Q3 2017



Highest Bounce Rate:

Direct & Display

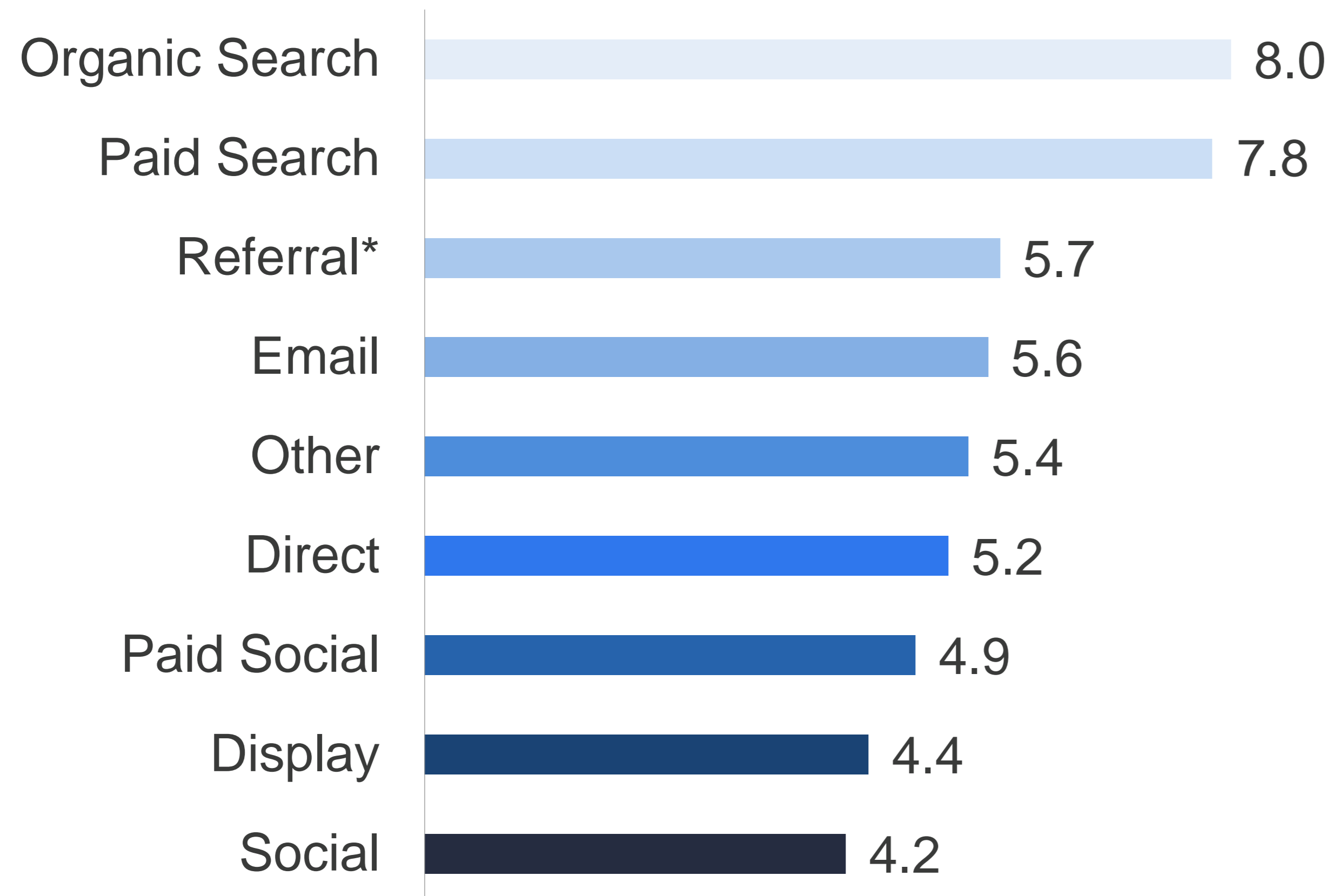
Lowest Bounce Rate:

Organic & Paid Search

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

Visited Pages

by session Q3 2017



Most visited pages:

Organic & Paid Search

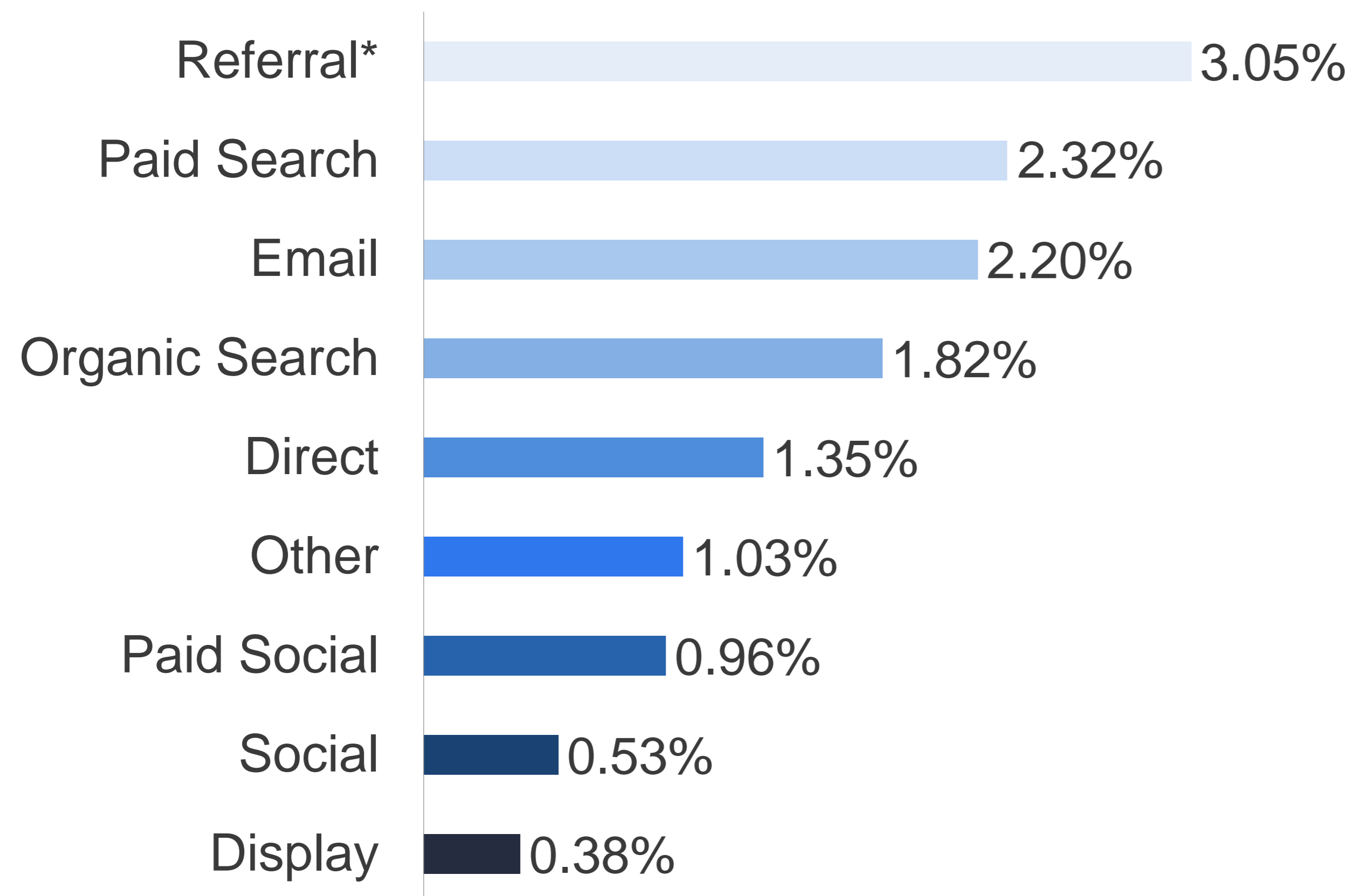
Least visited pages:

Social & Display

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

Conversion Rate

by channel Q3 2017



Highest Conversion Rate:

Referral & Paid Search

Lowest Conversion Rate:

Display & Social

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

Key findings Traffic Report Q3 2017



Paid Search

In Q3 paid search is the number one traffic source of the fashion panel with a stable traffic share of 36%. The conversion rate of 2.32% is on a high level and it increased by +0.2 compared to the last quarter.



Direct traffic

The direct traffic channel is on the third place of traffic sources with a traffic share of 16%. A moderate conversion rate of 1.35 and the highest bounce rate of 51.4% weakens the impact of direct traffic but it still achieves the third place regarding the share of the average revenue.



Organic Search

This channel makes it on the second place of traffic sources with a traffic share of 25%, lowest bounce rate, most visited pages and a conversion rate of 1.82%. The data shows very stable numbers in comparison to Q2.



Email

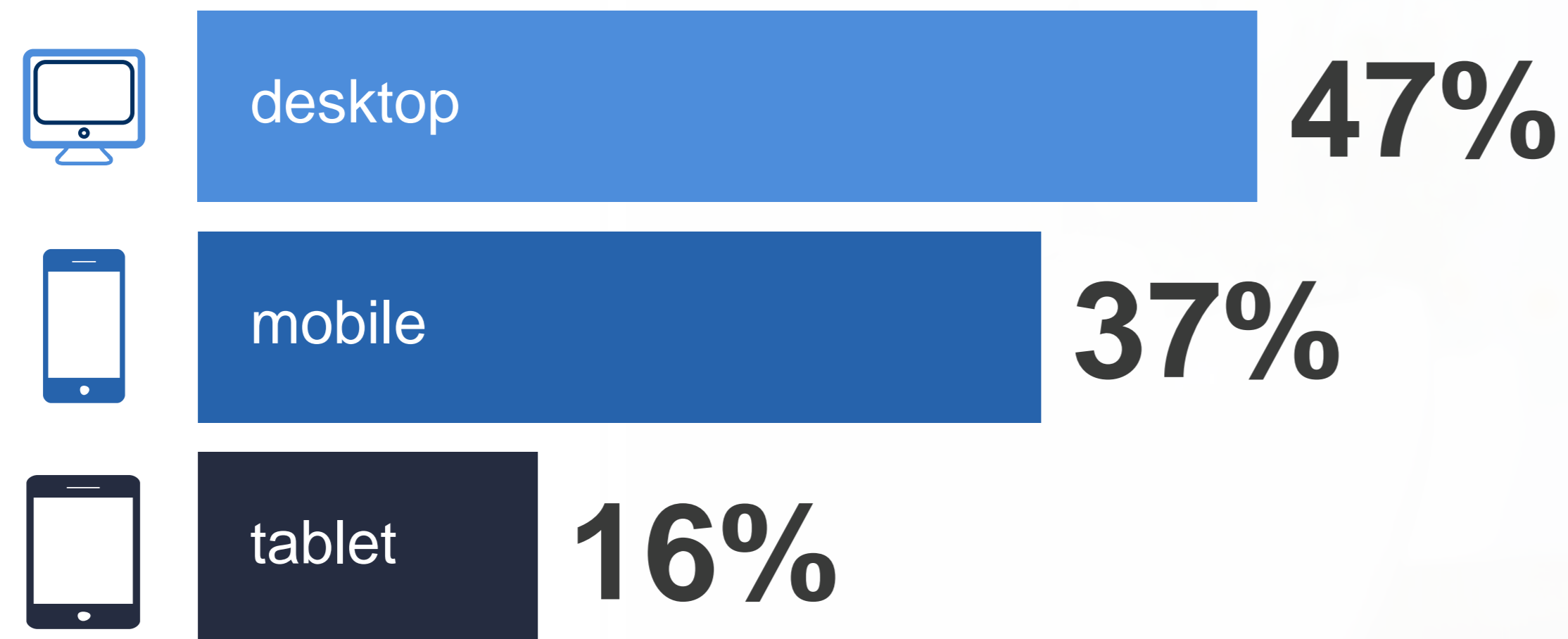
The conversion rate rose by 0.36% to 2.2% which is only a slightly lower rate than paid search and makes an increase of +20% in comparison to Q2. Complemented with a stable traffic share of 6%, email is an important traffic source which should not be underestimated.



AnalyticaA Online Fashion Panel Device Report Q3 2017

Traffic Sources by Device

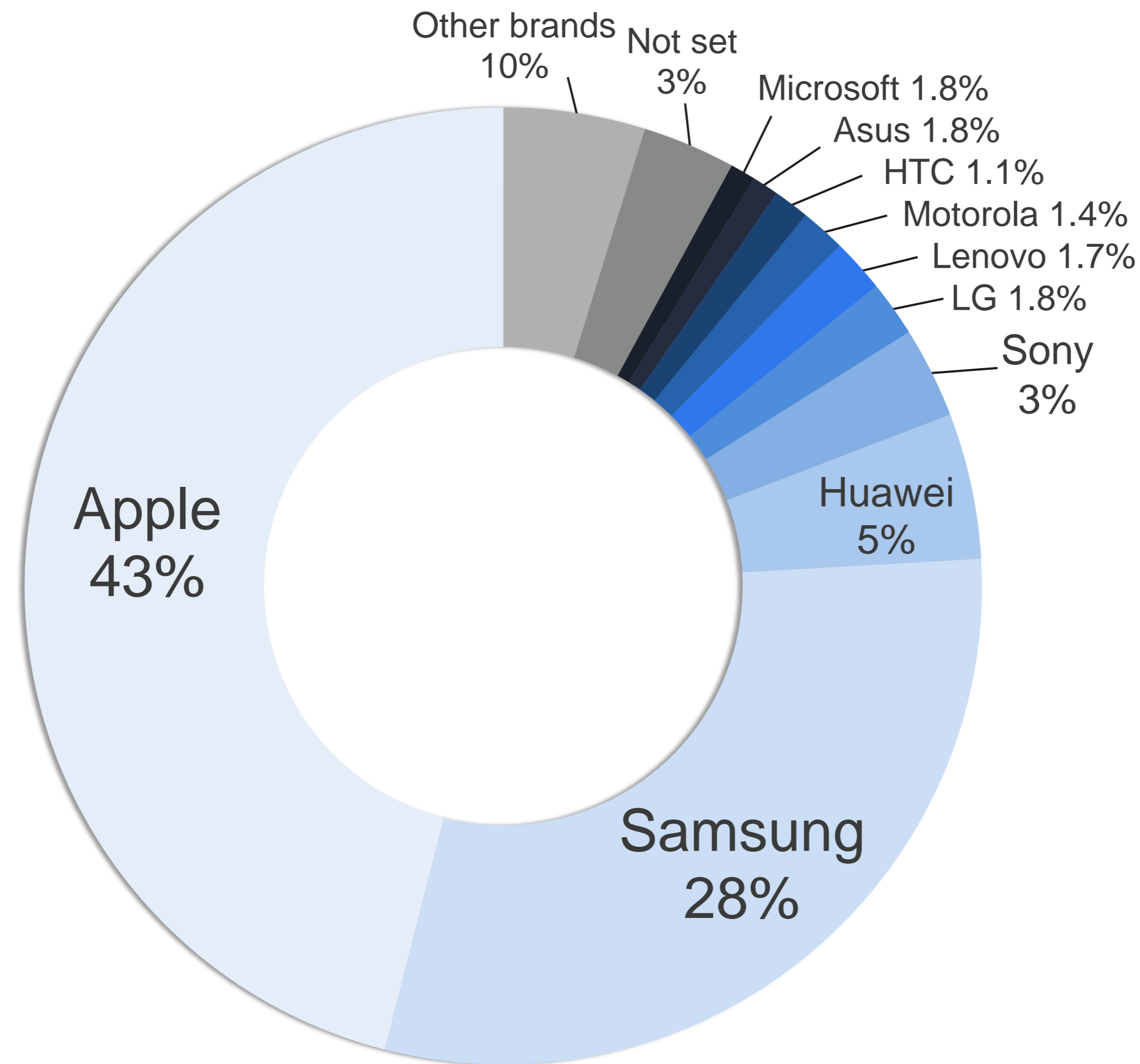
Q3 2017



- In Q3 the mobile traffic share rose by +3% while the desktop traffic share decreased by -3% compared to Q2.
- Tablet traffic share stays stable at a value of 16%.

Mobile Device Traffic by Brand

Q3 2017

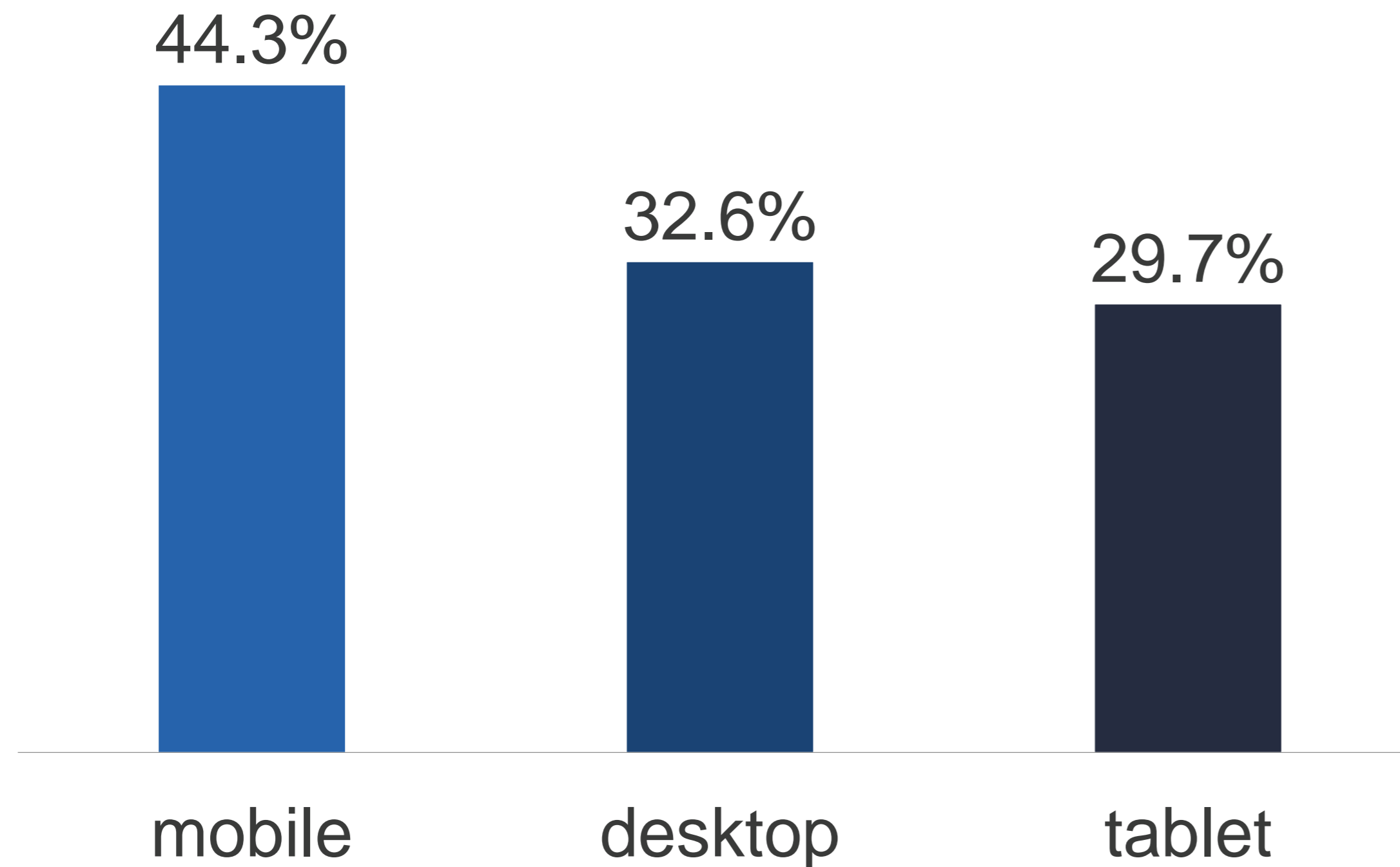


- In Q3 Apple lost 2% and Samsung lost 3% of traffic share compared to Q2.
- Huawei gained 3% traffic share compared to Q2.
- Lenovo's traffic share rose by 1% to 1.7% in Q3.

- Google's mobile device traffic share dropped by 3.5% from 4% in Q2 to 0.5% in Q3.

Shop Visitor Bounces by Device

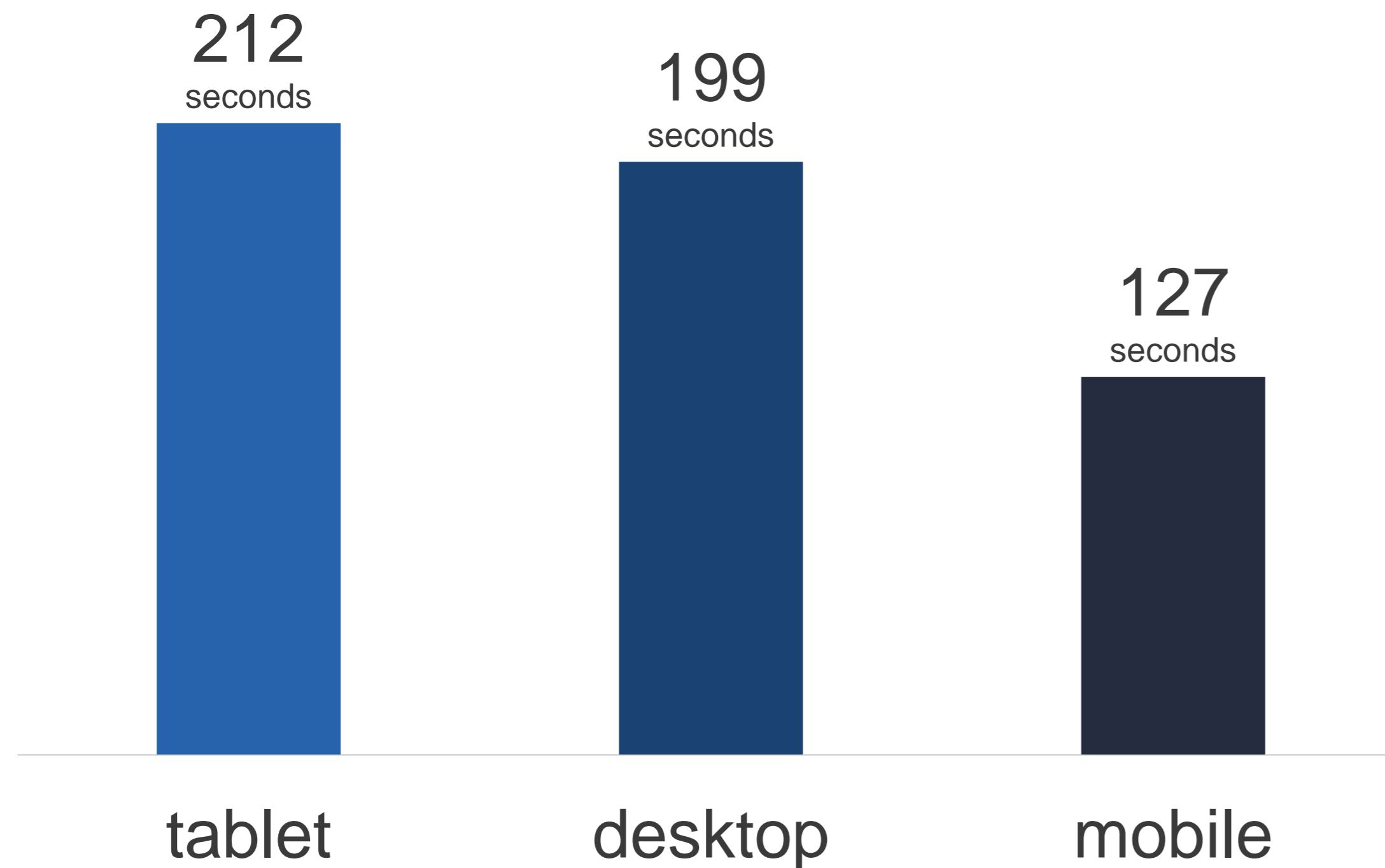
Q3 2017



- In Q3 the bounce rate of all three devices dropped by 3.3% on average compared to Q2.
- Desktop devices have the highest improvement regarding the bounce rate since it dropped by 4.35% from Q2 to Q3.
- Tablet devices still have the lowest bounce rate and compared to Q2 it decreased by 3.57%.

Average Session Duration in seconds by Device

Q3 2017

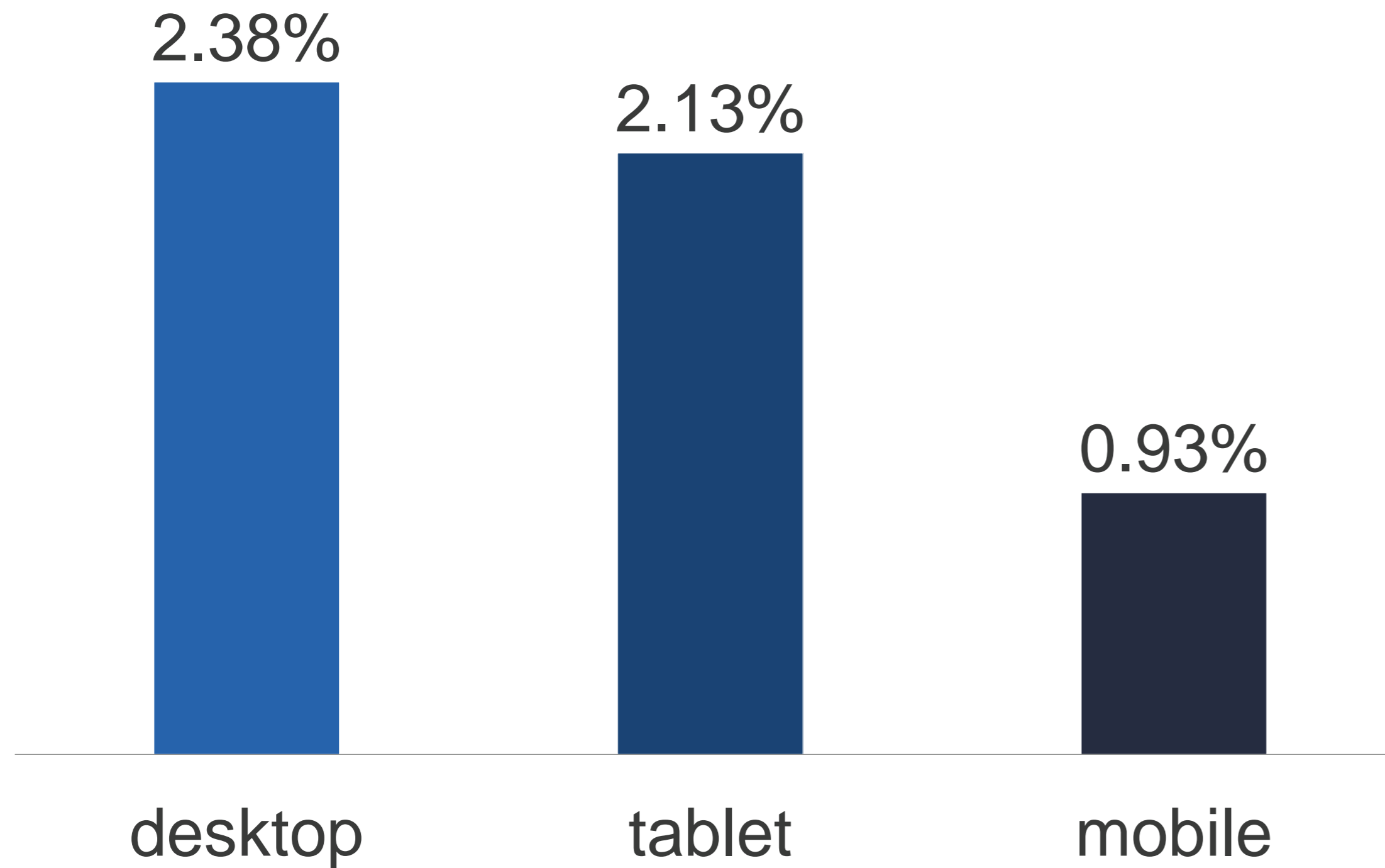


- In Q3 the average session duration increased for all devices: on average by 10 seconds per session.
- Tablet devices have the highest increase from Q2 to Q3 by 15 seconds per session.

- Tablet: 3.5 minutes
- Desktop: 3.3 minutes
- Mobile: 2.1 minutes

Average Conversion Rate by Device

Q3 2017




- From Q2 to Q3 the conversion rate of all devices increased slightly by 0.04% on average.

Key Findings Device Report

Q3 2017

- **Desktop lost more traffic shares to mobile devices and has a share of 47% in Q3.** Compared to Q2 mobile traffic has increased by 3%, while desktop traffic sunk by the same amount. It is the first time the desktop traffic share is less than 50% which shows that the trend towards mobile devices continues to rise.
- **Apple & Samsung mobile devices still have the highest traffic share with 71% but together they lost 5% compared to Q2.** Smaller mobile device brands increased their shares in relation to the previous quarter. Overall there is an increasing traffic share for smaller mobile device brands.



Huawei mobile devices are now the panel's third strongest mobile traffic source with a share of 5%.

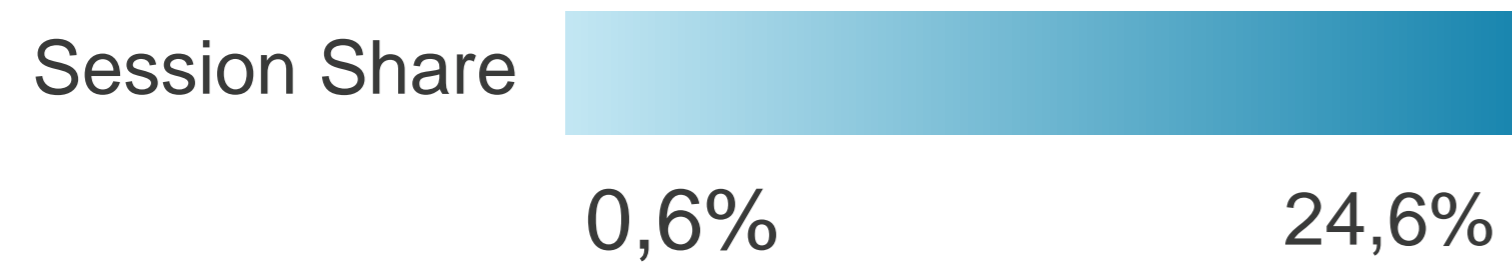
- **The share in revenue is highest for desktop traffic with a value of 62% while tablet and mobile are both at 19%.** There is definitely much more room for improvement for mobile devices especially when looking at the poor conversion rate of 0.93%. Since tablet devices have the same share in revenue with a traffic share of just 16% but a high conversion rate of 2.13% it is obvious that mobile's high traffic share of 37% has not yet reached its full potential.



AnalyticaA Online Fashion Panel Geo Report Q3 2017

Session Share by federal states

Q3 2017



Most traffic:
Bavaria & North Rhine-Westphalia

Least traffic:
Bremen & Mecklenburg-Vorpommern



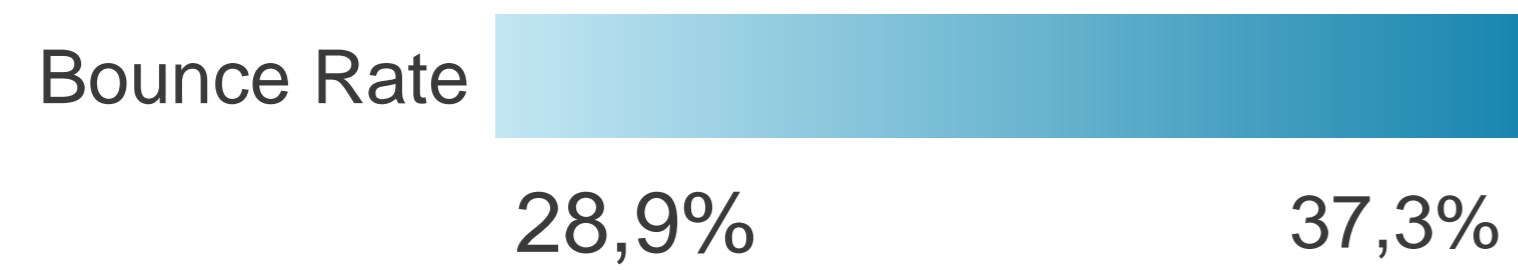
Top 50 towns in Germany by session shares



Town	Avg. Session Share			Avg. Bounce Rate	Avg. Pages per Session	Avg. Conversion Rate
	Q3	Q2	Q1			
Munich	8,35%	7,98%	7,35%	39,92%	6,0	1,75%
Berlin	6,85%	5,92%	6,99%	36,98%	6,4	1,88%
Hamburg	4,65%	5,41%	3,29%	37,60%	6,2	1,79%
Cologne	3,49%	4,49%	4,01%	35,55%	6,5	1,81%
Frankfurt	2,39%	2,19%	2,51%	37,11%	6,8	2,39%
Stuttgart	1,65%	1,61%	1,84%	33,89%	7,1	2,22%
Nuremberg	1,56%	1,57%	1,20%	30,89%	7,6	2,28%
Dusseldorf	1,26%	1,25%	1,45%	31,84%	7,3	2,36%
Dortmund	1,18%	1,03%	1,20%	35,65%	6,9	2,27%
Halle (Saale)	0,87%	0,88%	0,90%	23,36%	6,9	6,67%
Hanover	0,86%	0,75%	0,99%	31,63%	7,3	2,50%
Essen	0,83%	0,74%	1,06%	30,50%	7,5	2,37%
Dresden	0,82%	0,71%	0,95%	31,15%	7,0	2,45%
Leipzig	0,81%	0,70%	0,64%	36,13%	6,7	2,23%
Augsburg	0,60%	0,68%	0,58%	31,38%	7,5	2,15%
Karlsruhe	0,59%	0,63%	0,78%	30,60%	7,1	2,09%
Bremen	0,55%	0,61%	0,50%	33,48%	7,8	2,35%
Regensburg	0,53%	0,58%	0,60%	28,63%	7,9	3,05%
Osnabruck	0,53%	0,58%	0,59%	32,54%	6,9	1,66%
Duisburg	0,51%	0,54%	0,48%	34,53%	7,1	2,41%
Bochum	0,46%	0,50%	0,48%	33,64%	6,9	2,13%
Bonn	0,46%	0,49%	0,29%	29,87%	7,4	2,27%
Mannheim	0,46%	0,49%	0,61%	31,85%	7,3	2,25%
Freiburg	0,39%	0,49%	0,31%	31,00%	7,8	2,54%
Kassel	0,38%	0,44%	0,48%	31,40%	7,3	2,61%
Mainz	0,37%	0,44%	0,39%	29,61%	7,0	1,98%
Bayreuth	0,37%	0,44%	0,47%	31,02%	6,8	2,13%
Aachen	0,37%	0,42%	0,40%	33,52%	6,5	2,47%
Bielefeld	0,36%	0,39%	0,29%	32,07%	6,9	1,87%
Oldenburg	0,36%	0,39%	0,34%	36,35%	6,8	1,73%
Ingolstadt	0,35%	0,39%	0,45%	29,39%	7,9	1,76%
Passau	0,35%	0,37%	0,33%	29,90%	6,8	1,81%
Wurzburg	0,34%	0,36%	0,36%	31,32%	7,1	2,26%
Kiel	0,34%	0,34%	0,32%	38,07%	6,7	1,94%
Wiesbaden	0,33%	0,34%	0,40%	30,77%	7,6	2,90%
Monchengladbach	0,33%	0,33%	0,29%	31,25%	7,0	1,87%
Brunswick	0,32%	0,33%	0,42%	34,91%	6,8	1,32%
Magdeburg	0,32%	0,31%	0,36%	29,46%	8,5	2,33%
Munster	0,31%	0,31%	0,33%	31,74%	6,7	1,91%
Chemnitz	0,31%	0,31%	0,30%	34,89%	6,8	1,52%
Erlangen	0,31%	0,30%	0,11%	31,34%	7,1	2,51%
Erfurt	0,30%	0,30%	0,59%	32,66%	8,2	1,81%
Ulm	0,30%	0,30%	0,52%	32,20%	8,0	2,76%
Krefeld	0,29%	0,29%	0,26%	34,39%	7,1	1,97%
Trier	0,29%	0,29%	0,28%	32,18%	7,7	1,72%
Wuppertal	0,29%	0,28%	0,21%	33,29%	7,5	2,30%
Weiden	0,27%	0,28%	0,17%	30,02%	8,4	3,58%
Darmstadt	0,25%	0,28%	0,36%	32,33%	7,3	2,87%
Rostock	0,24%	0,26%	0,18%	31,42%	7,7	3,18%
Saarbrucken	0,23%	0,25%	0,39%	32,44%	6,8	2,30%

Average Bounce Rate by federal states

Q3 2017



Highest Bounce Rate:

Hamburg & Berlin

Lowest Bounce Rate:

Saxony-Anhalt & Baden-Wurtemberg



Average Pages per Session by federal states

Q3 2017

Avg. Pages per Session



Most Pages per Session:

Thuringia & Bremen

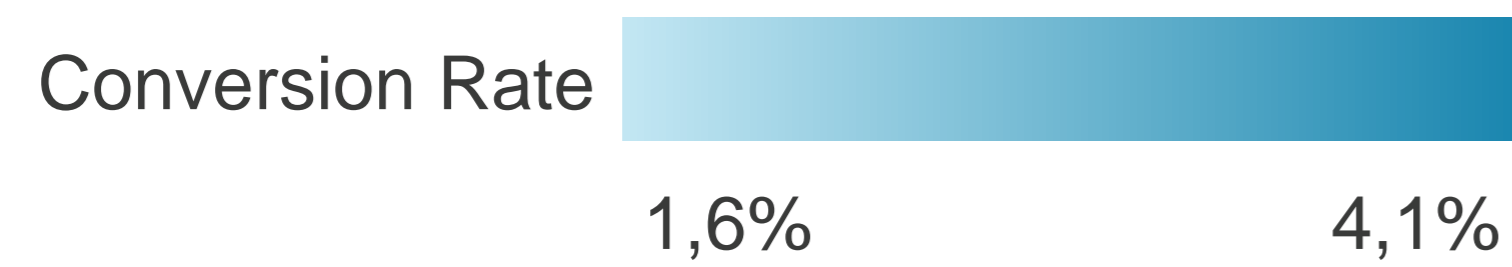
Least Pages per Session:

Hamburg & Berlin



Average Conversion Rate by federal states

Q3 2017



Highest Conversion Rate:

Saxony-Anhalt

Lowest Conversion Rate:

Hamburg & Schleswig-Holstein



Key Findings Geo Report

Q3 2017

- In Q3 58.2% of all shop sessions came from only three of Germany's federal states:
 - ✓ **24.6% Bavaria**
15.6% of the German population*
 - ✓ **22% North Rhine-Westphalia**
21.7% of the German population*
 - ✓ **Baden-Wuerttemberg 11.6%**
13.2% of the German population*
- **Munich, Berlin and Hamburg are the most important cities for the fashion panel.** In Q3 their combined average traffic share was 19.8% of the total panel's traffic in Germany.

- In comparison to Q2 the overall data in Q3 for all federal states shows a positive development:
 - The avg. Bounce Rate dropped from 38.1% to 33.7%
 - The avg. Pages per Session increased from 6.4 to 7.0
 - The avg. Conversion Rate rose from 2.12% to 2.3%
- In Q3 the following five cities make ~ 20% on average of the total panel's share in revenue:
 - Munich: 6.14%
 - Berlin: 5.18%
 - Hamburg: 4.22%
 - Frankfurt: 3.43%
 - Cologne: 2.56%



To get more information about the digital fashion industry of Germany & the EU

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