

+++ C&A +++ Diesel +++ Esprit +++ G-Star +++ H&M +++ Fashion ID +++ s.Oliver
+++ TOM TAILOR +++ Zalando +++ Zara +++ C&A +++ Diesel +++ Esprit +++ G-Star

Study Profile E-Shop-Analysis Clothing 2014

analysed by:
research tools, Esslingen am Neckar

January 2014

Information on study

Key facts (selection):

- Extent of product range of the ten analysed online clothing shops varies considerably from a little more than 1.000 articles up to almost 120.000 articles.
- While most of the analysed E-Shops are consistent in their main product groups, definition and structure of subgroups vary. Additionally they also offer articles of other product categories such as accessories, living & lifestyle products, sportswear or shoes.
- All shops have a different focus and emphasize different highlights of their offer.
- Evaluation of price ranges shows some major differences between the vendors.
- The service quality of the selected companies differs clearly and qualifies for differentiation. Analysed aspects are service hotline, payment options and conditions of delivery.
- Incentives as e.g. discounts, a loyalty bonus or a free thank-you gift are used in different forms by most shops to entice customers.
- Most shops have to face some minor flaws in terms of being helpful for customer's orientation. The search function in particular is performing with varying efficiency. Some show instant hits, some list any product that could roughly fit the description.

Information on study

You want to know

- whether your e-shop is able to support customer's orientation on the site in a satisfying way?
- how product offer in your shop is structured compared to competitors?
- what product groups are missing in your e-shop?
- the positioning of your e-shop in terms of pricing?
- what product groups in your shop offer price advantages for consumers?
- what service quality you offer?
- how strengths and weaknesses of your e-shop affect your overall performance?

Research Design:

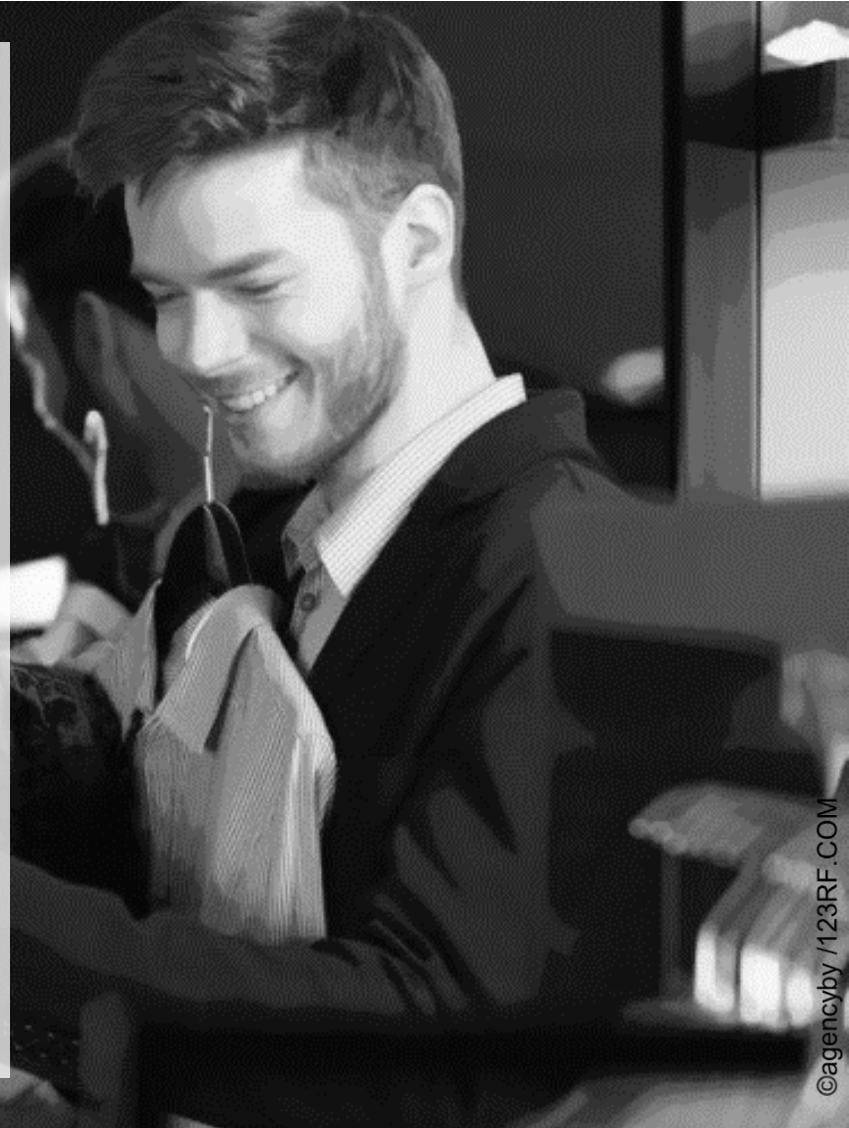
This study is based on data which was collected between August-October 2013 by research tools on the respective pages of the online clothing stores of C & A, Diesel, Esprit, G-Star, H & M, Fashion ID, s.Oliver, TOM TAILOR, Zalando and Zara.

The e-shops were analysed and evaluated in terms of orientation, range of products, conditions and service. In order to draw a comparison, strengths and weaknesses of each shop are summarized. Additionally, a scoring system considering all analysed criteria provides an overall evaluation.

The study consisting of 136 pages can be ordered for 1.800 EUR plus VAT and will be provided on CD-ROM (document as PDF and PowerPoint) or alternatively per e-mail (PDF file only).

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Study extracts (1)

Orientation

Navigation – Search function

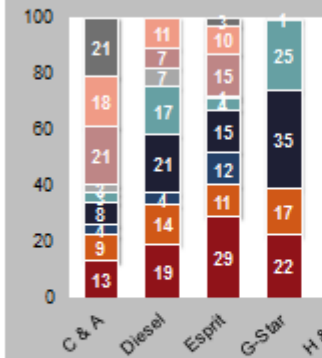
Navigation – Search function for “Herren Polo hemd, weiß“

| E-Shop | Number of articles listed |
|--------------------|---------------------------|
| C & A | |
| Diesel | |
| Esprit | |
| G-Star | |
| H & M | |
| Fashion ID (P & C) | 2 |
| s.Oliver | 1 |
| TOM TAILOR | |
| Zalando | 1 |
| Zara | |

Products

Standard Product Groups

Distribution of the articles on s



What product groups have development potential regarding their product mix?

Products

Additional Offers

Additional Offers

| E-Shop | Themed Shops | Brand shops | Newsletters | Other Categories |
|--------------------|--------------|-------------|-------------|--------------------------------------|
| C & A | x | - | x | Clockhouse |
| Diesel | x | x | - | Diesel Black Gold, 55DSL, Lifestyle |
| Esprit | x | x | x | Stories, Friends |
| G-Star | - | x | x | Featured |
| H & M | x | - | - | H&M Life, Home |
| Fashion ID (P & C) | - | x | x | Marken, Magazin, Premium |
| s.Oliver | x | x | x | Triangle, Lookbook, Fashion Magazin |
| TOM TAILOR | - | x | - | Get the Look, Fashion Magazine |
| Zalando | x | x | - | Magazin |
| Zara | - | - | x | Pictures, Lookbook, Campaign, Cities |

* most sold products

How does your search function perform in comparison?

Please note: extracts show fictional data

Study extracts (2)

Conditions

Price Ranges Standard Assortment

Price Ranges – 3. Women – Underwear (in Euro, except for Index)

| E-Shop | Pyjam |
|--------------------|-------|
| C & A | |
| Diesel | |
| Esprit | |
| G-Star | |
| H & M | |
| Fashion ID (P & C) | |
| s.Oliver | |
| TOM TAILOR | |
| Zalando | 3 |
| Zara | |

Conditions

Incentives

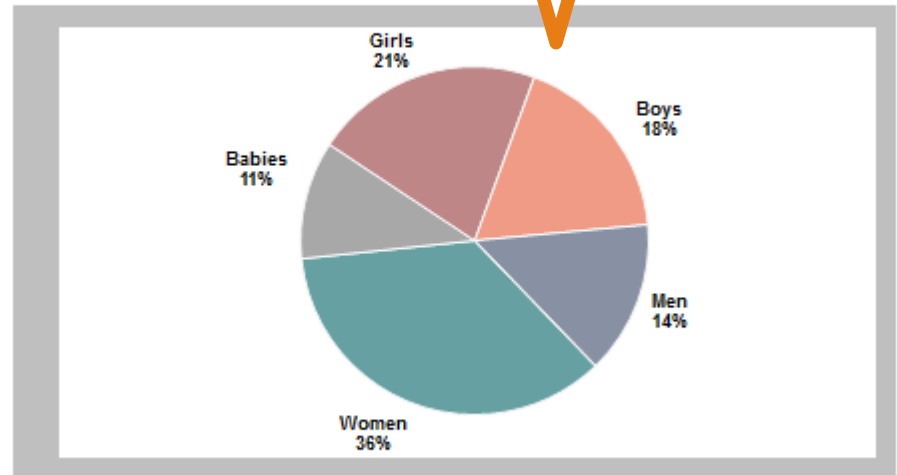
Incentives (1)

| E-Shop | Friend Bon |
|--------------------|------------|
| C & A | x |
| Diesel | - |
| Esprit | - |
| G-Star | - |
| H & M | - |
| Fashion ID (P & C) | - |
| s.Oliver | - |
| TOM TAILOR | - |
| Zalando | - |
| Zara | - |

Products

Main Product Groups of Providers

Main Product Groups Clothing* – xxx



* Original names of categories as used by vendor

How do competitors define and structure their product range?

Which company performs best in certain product groups?

Please note: extracts show fictional data

Study extracts (3)

Service

Key differentiators

Key differentiators

| E-Shop | Key dif |
|--------------------|-----------|
| C & A | free ship |
| Diesel | no hotlin |
| Esprit | gift coup |
| G-Star | short bu |
| H & M | paymen |
| Fashion ID (P & C) | long bus |
| s.Oliver | product |
| TOM TAILOR | no paym |
| Zalando | long bus |
| Zara | limited p |

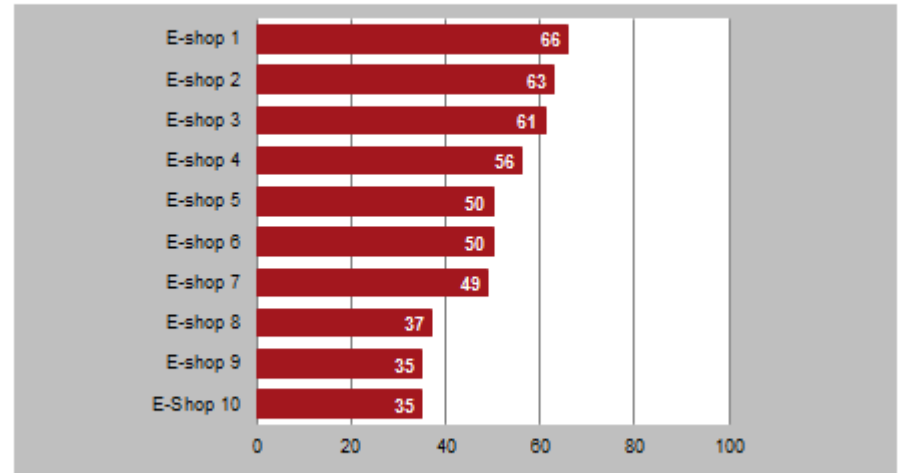
Strengths and Weaknesses

Strengths and Weaknesses of each shop

| E-Shop | St |
|--------|--|
| XXX | <ul style="list-style-type: none"> + very good na + two seals of q + wide range of + all product gr + free delivery + free hotline wi + fashion encoy + short delivery |
| YYY | <ul style="list-style-type: none"> + extraordinary + good prices (: rankings) |

Ranking

Overall Ranking (Achieved score in % of possible maximum score)



What strengths and weaknesses influence your overall performance?

What is your overall performance compared to your competitors?

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E-Shop-Analysis Clothing 2013

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Order form

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Herewith we commission the study **E-Shop-Analysis Clothing 2014** at the price of 1.800 EUR plus VAT.

Buyer:

Company: _____

Contact person: _____

E-Mail: _____

Position: _____

Signature: _____

Date/ Place: _____

Contact

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