

Overview of the Fashion eCommerce European Market

with NielsenIQ and Tommy Hilfiger



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The **NIQ** mission



Leading global consumer intelligence company

- ✓ 23K clients including 80% of Fortune 100 companies
- ✓ NIQ data, tech & expertise embedded in client workflows
- ✓ Provide brands, retailers and other clients a holistic view of consumer shopping behavior to drive mission-critical strategic and operating decisions

NIQ Digital Purchases by NielsenIQ

We are the most advanced and the most reliable consumer panel for e-commerce in the US & Europe

+6M
E-SHOPPERS

GDPR
COMPLIANT

+1K RETAILERS

3 YEARS
BACK DATA

THE MOST ACCURATE DATA

PASSIVELY ACQUIRED - DELIVERED WEEKLY

TRUSTED BY



zalando showroomprive.com



LACOSTE

...

DECATHLON

LA REDOUTE

**N BROWN
GROUP PLC**

Today, NIQ Digital Purchases
is the largest GDPR
compliant panel in Europe

Panel Size

+2M

online shoppers

NIQ *Digital Purchases*

Scope of Analysis & Number of Active Online Shoppers

Europe



330k



350k



320k



280k



290k



160k



145k



77k



70k



65k

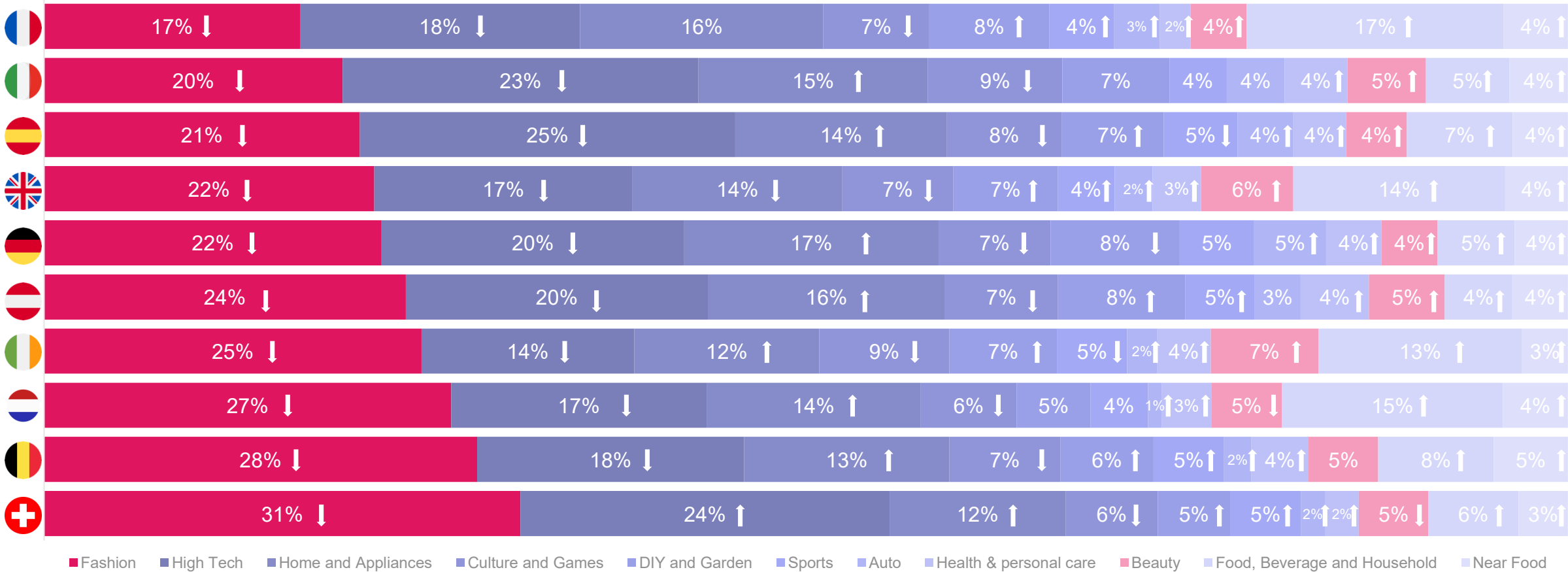
The Outlook Of The Online Fashion Market In Europe



Fashion is losing online share of wallet

Weight of Fashion online purchases in total e-commerce (services excluded) – in value

Total Ecommerce – Last 12 months



Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing, Luggage & Bags, Shoes & accessories. Data ending 28 September 2025

As fashion consumers are placing more but smaller orders

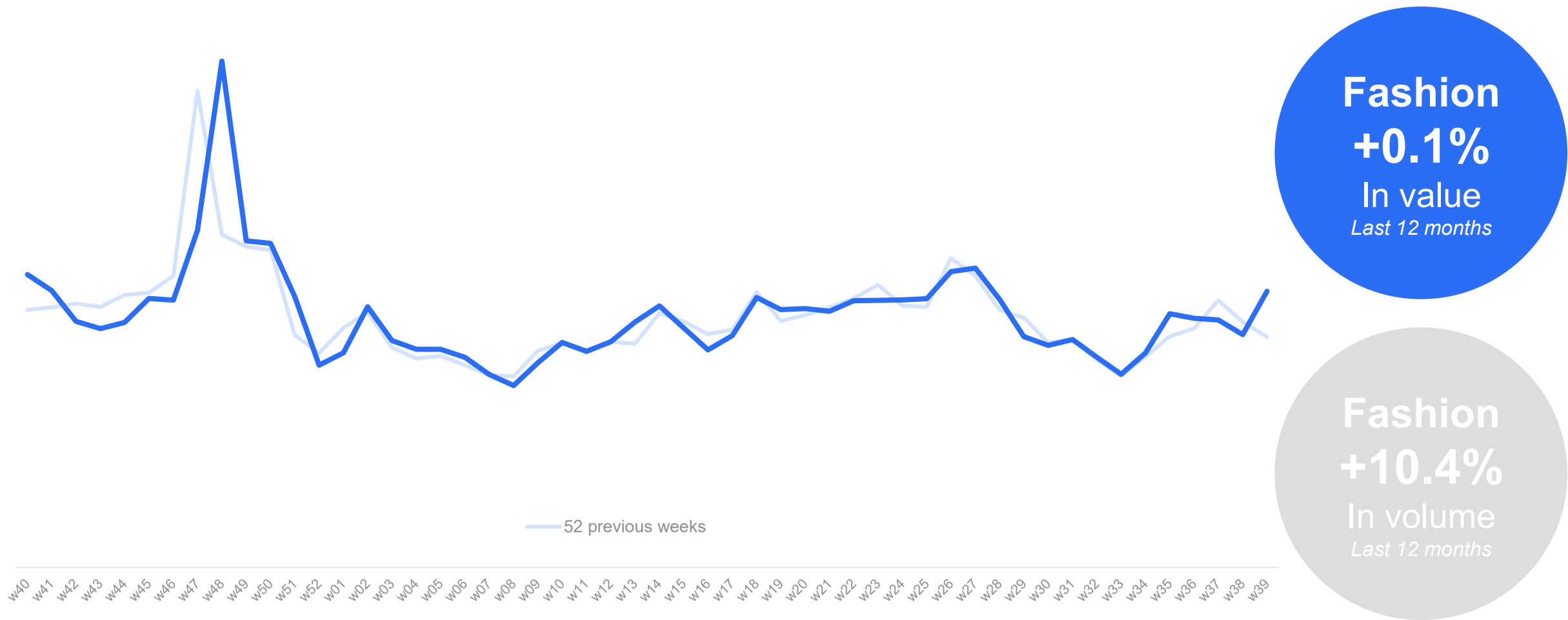
Consumer KPIs per country
Online Fashion – Last 12 months

										
Average online spend per e-shopper	815€ ↑	578€ ↓	512€ ↑	508€ ↑	489€ ↑	475€ ↑	394€ ↑	307€ ↓	274€ ↓	250€ ↑
Purchase frequency	7	8.5 ↑	11.8 ↑	9.3 ↑	7.7 ↑	8.9 ↑	8.2 ↑	7.2 ↑	6.3 ↑	6.6 ↑
Average basket	109€ ↓	68 € ↓	43€ ↓	55€ ↓	64€ ↓	54€ ↓	48€ ↓	43€ ↓	43€ ↓	38€ ↓
Penetration among e-shoppers	69% ↑	73%	78% ↑	76% ↑	70%	75% ↑	72% ↑	75%	75% ↑	75% ↑

Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing, Luggage & Bags, Shoes & accessories. Data ending 28 September 2025.

In Europe, fashion sales are growing in volume but stable in value

Weekly Sales in value
Online Fashion EU10 – Last 12 months

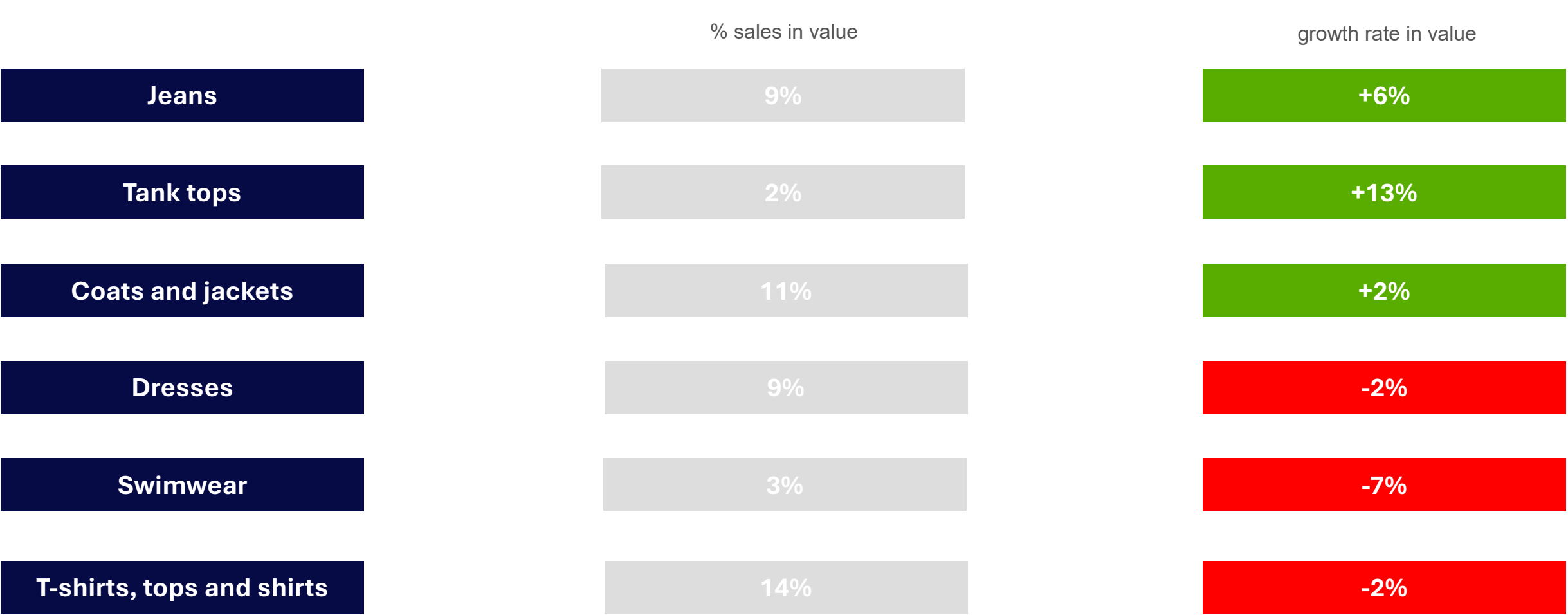


Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing, Luggage & Bags, Shoes & accessories. Data ending 28 September 2025

Jeans is the category that generated the most additional revenue across Europe

Top and flop clothing categories by revenue change

Online clothing EU10 (baby & child excluded) – Last 12 months

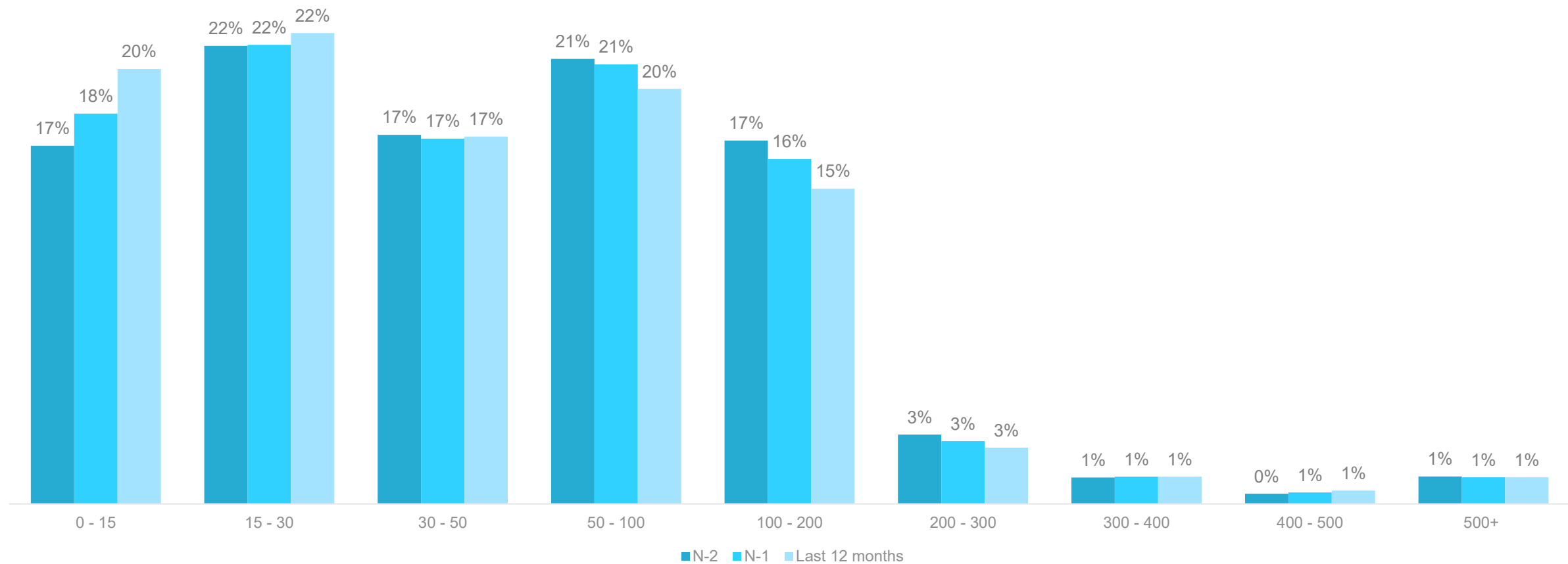


Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing, Luggage & Bags, Shoes & accessories. Data ending 28 September 2025



A shift toward budget fashion is underway, with items under 15€ on the rise

Price ranges' mix – in value
Online Fashion – Last 12 months



Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing, Luggage & Bags, Shoes & accessories. Data ending 28 September 2025.

Value driven players are the fastest-growing merchants

Top merchants per country – in value
Online Fashion – Last 12 months



Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing, Luggage & Bags, Shoes & accessories. Data ending 28 September 2025.

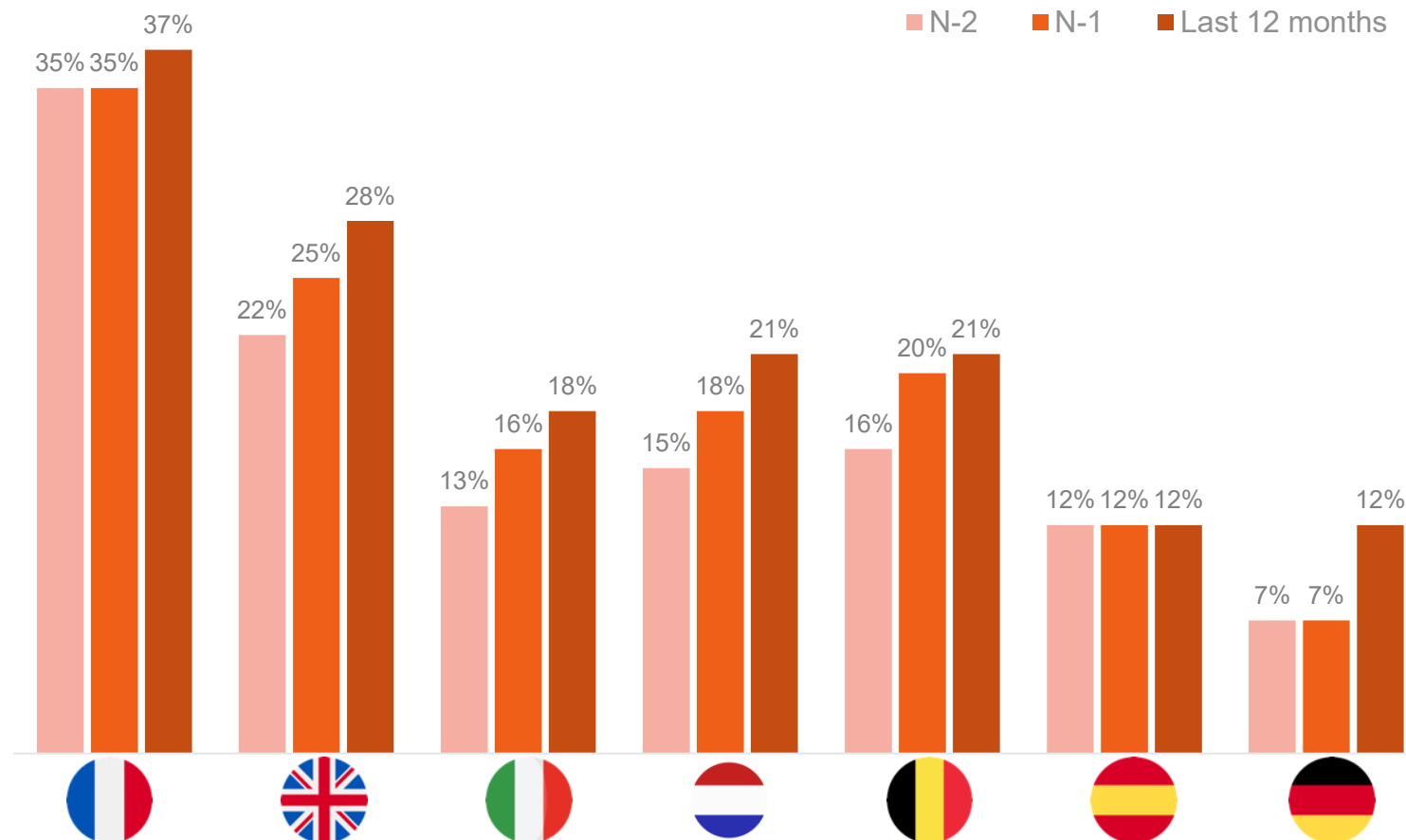
Fashion on a Budget: Second-Hand



More and more shoppers are buying second-hand

Second-hand penetration per country

Online Fashion – Last 12 months

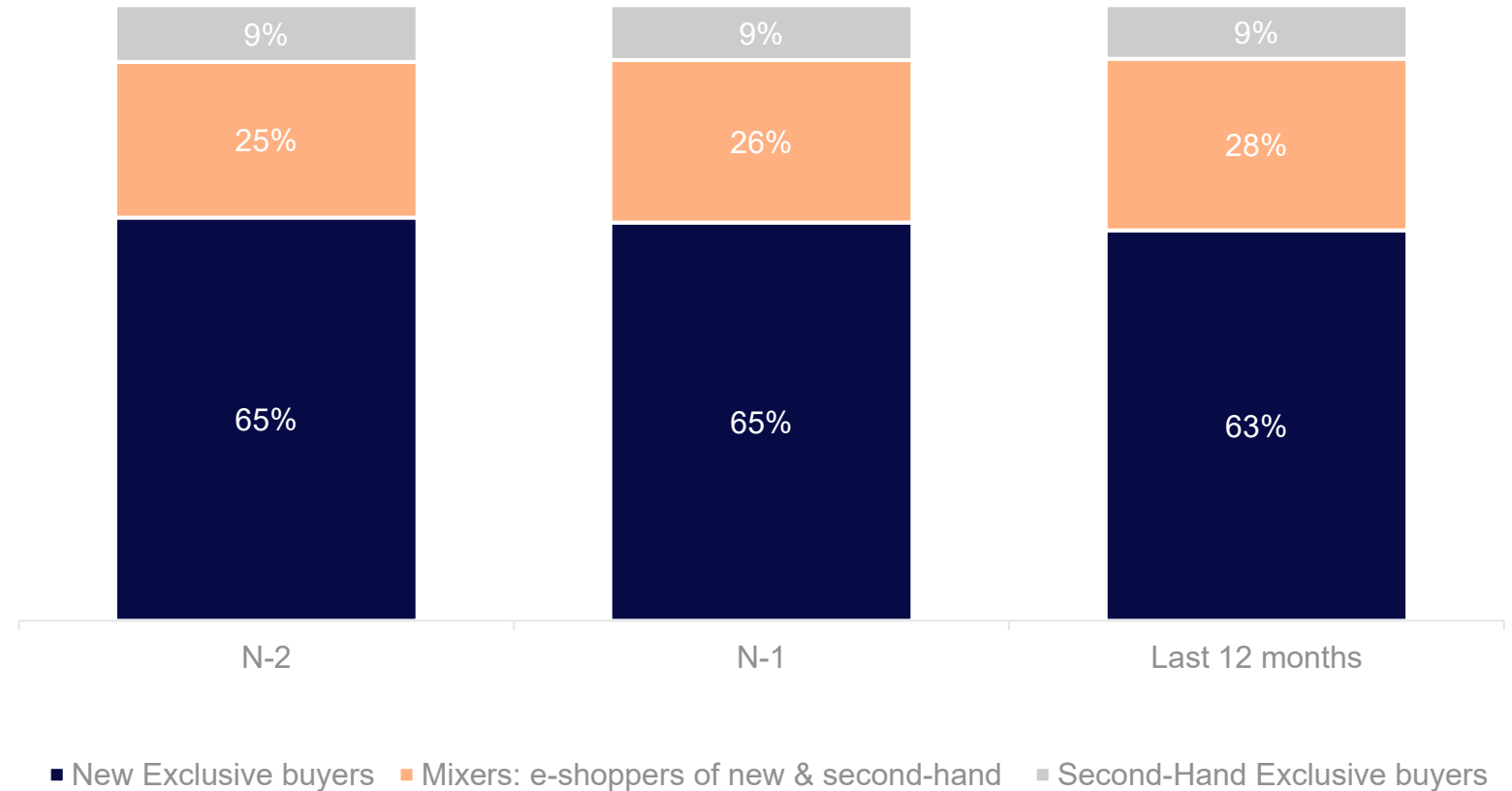


Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing, Luggage & Bags, Shoes & accessories. Data ending 28 September 2025



The share of shoppers mixing new and second-hand fashion is growing

Breakdown of fashion e-shoppers between new fashion e-shoppers & second-hand fashion e-shoppers
Online Fashion



Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing, Luggage & Bags, Shoes & accessories. Data ending 28 September 2025.

Vinted enables budget-friendly access to all brands, regardless of their positioning **Vinted**

Brands with the highest Vinted market share in their distribution mix
Online Fashion – Last 12 months

Clothing									
#1	#2	#3	#4	#5	#6	#7	#8	#9	#10
									

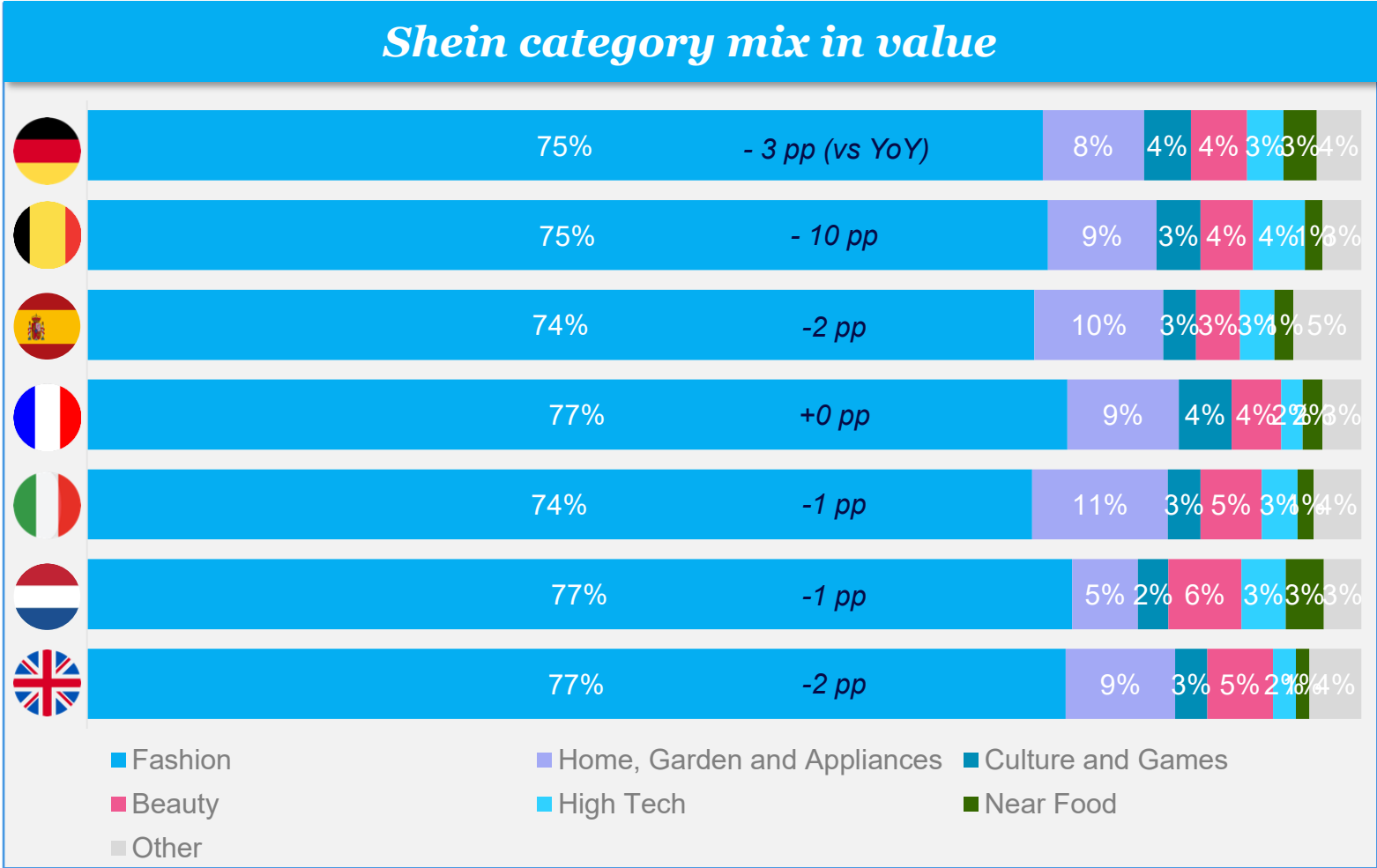
Shoes									
#1	#2	#3	#4	#5	#6	#7	#8	#9	#10
									

Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing, Luggage & Bags, Shoes & accessories. Data ending 28 September 2025

Fashion on a Budget: Shein



No longer a fashion specialist, Shein is becoming a Pure Player by diversifying into decoration, beauty, games, etc.



Source: NIQ Digital Purchase e-commerce consumer panel. Data ending 30.06.2025.

Shein Shoppers are heavy fashion shoppers



Average Fashion Shopper Annual Online Spend:

678€

Average **Shein Fashion Shopper** Annual Online Spend:

884€

Average Shopper Annual Purchase Frequency:

8.5

Average **Shein Fashion Shopper** Annual Purchase Frequency:

13.7

Average Shopper Average Basket Size:

68€

Average **Shein Fashion Shopper** Average Basket Size:

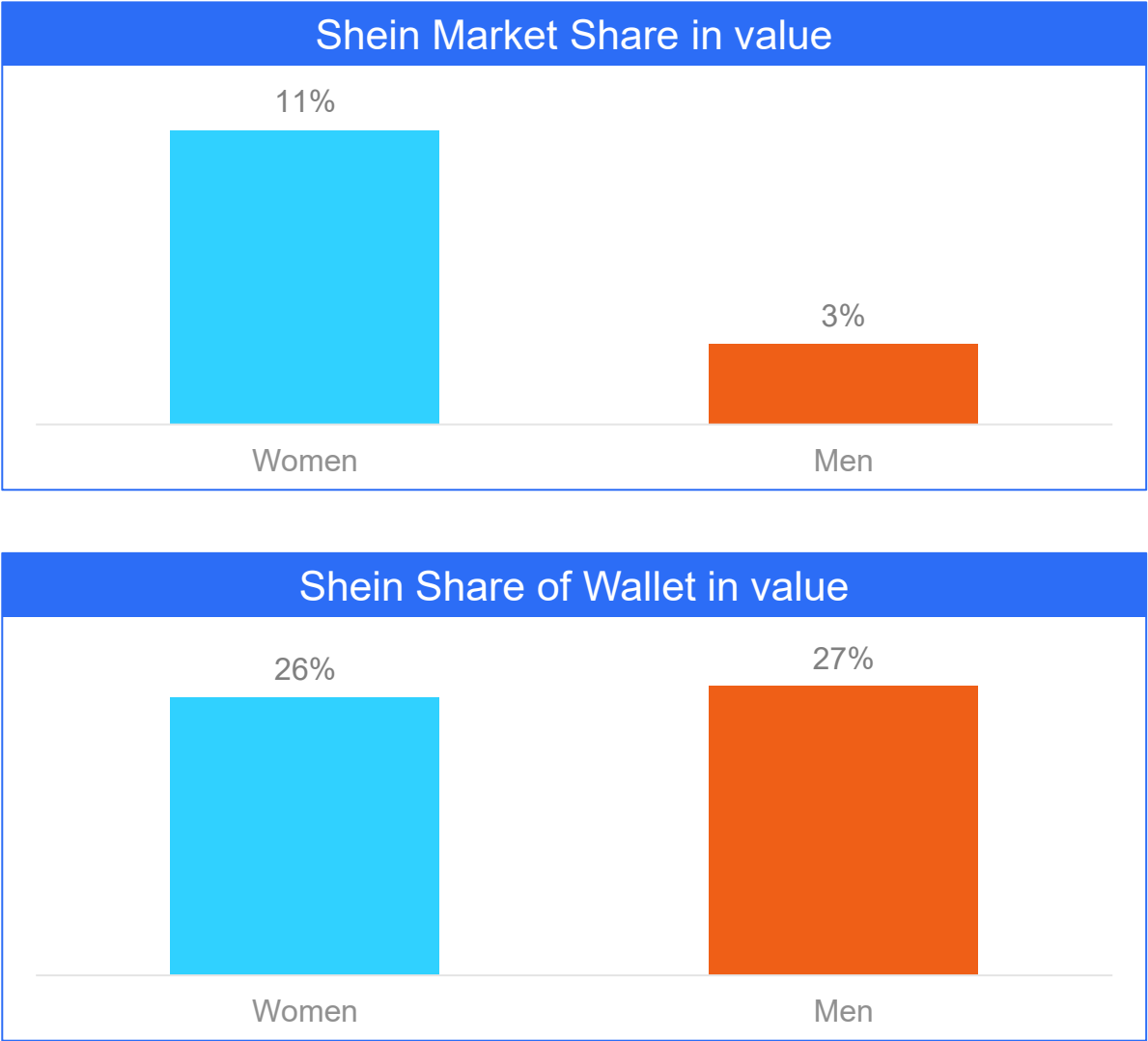
65€

Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing, Luggage & Bags, Shoes & accessories. Data ending 28 September 2025.

Shein over-index among Gen Z and women
However, converted men are as loyal to Shein as women



Women
82%
of Shein sales
in value



Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing, Luggage & Bags, Shoes & accessories. Data ending 28 September 2025.

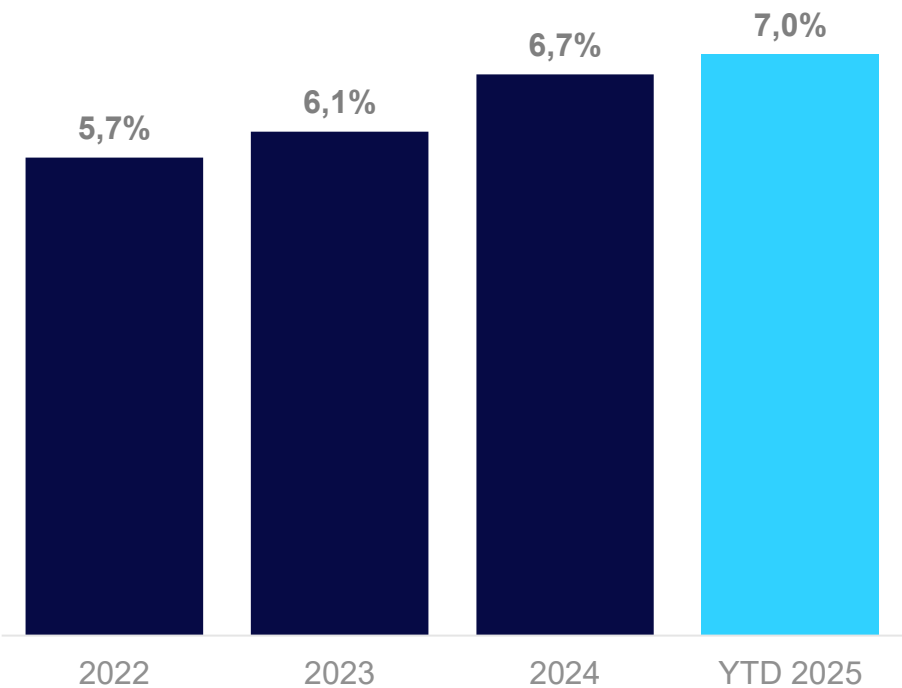
Nike: a historic leader under pressure



Year after year, Activewear keeps grabbing bits of market share

Value Share of Activewear

Online Fashion – EU10 – Second Hand excluded



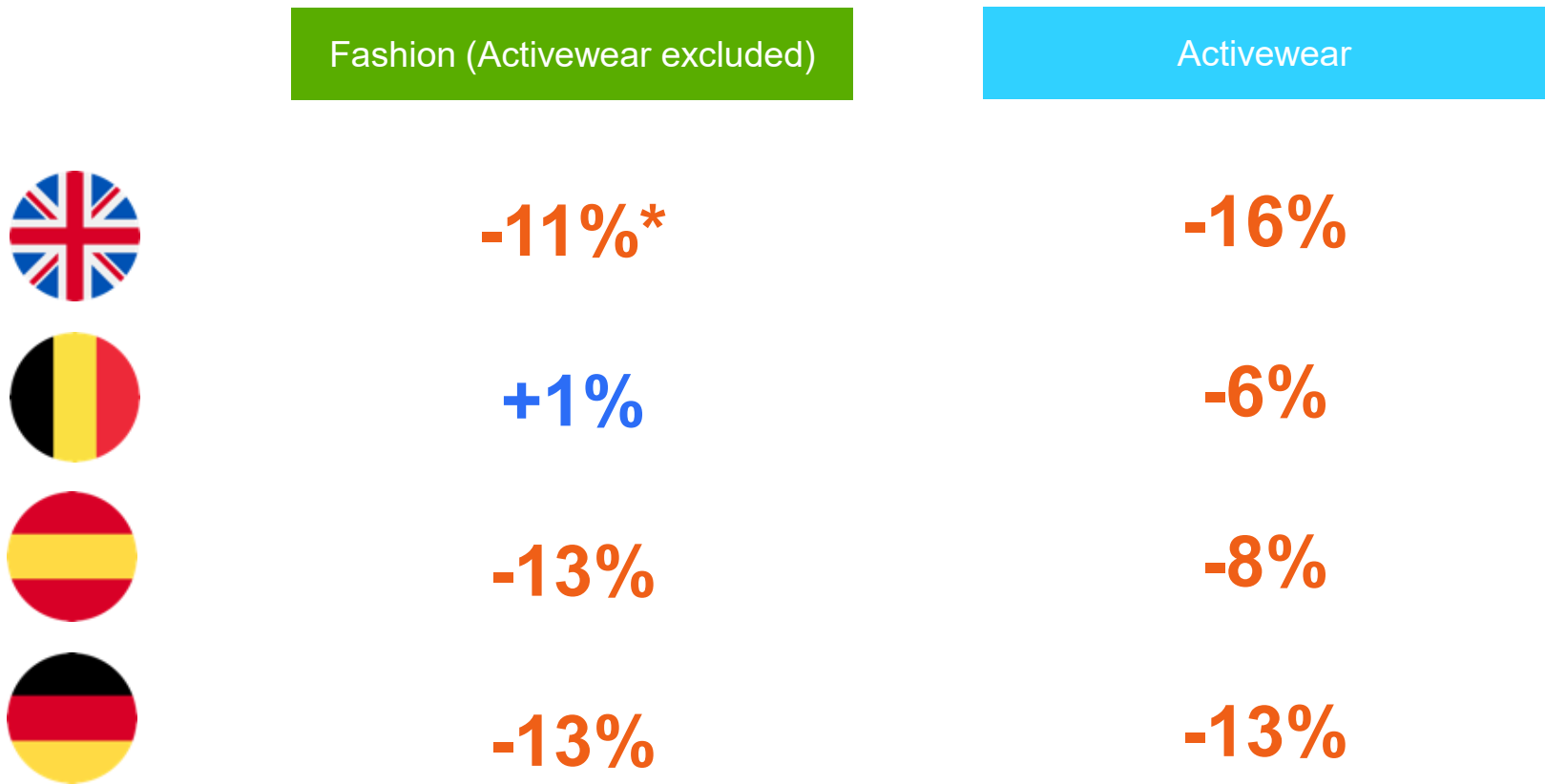
Top 5 most dynamic brands in YTD 2025 – Activewear



Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing, Luggage & Bags, Shoes & accessories. Data ending 28 September 2025.

Across Europe, Nike has lost more customers than any other fashion or Activewear brand

Nike Customer Base Evolution vs year ago
Online Fashion (Clothing and Shoes) – EU10 – Second Hand excluded



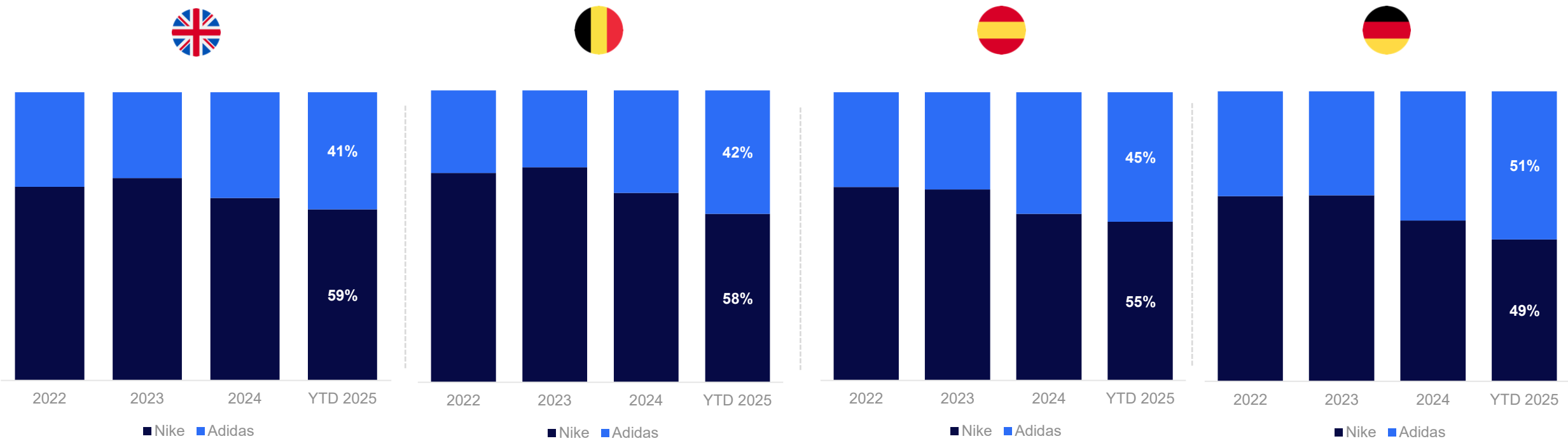
Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing& Shoes . Data ending 28 September 2025.

In the Fashion category (excluding Activewear), Nike's eCommerce customer base declined by 11%.

In this context, Adidas is narrowing the gap with Nike and has even overtaken it in Germany

Battle between Nike and Adidas – Value Sales

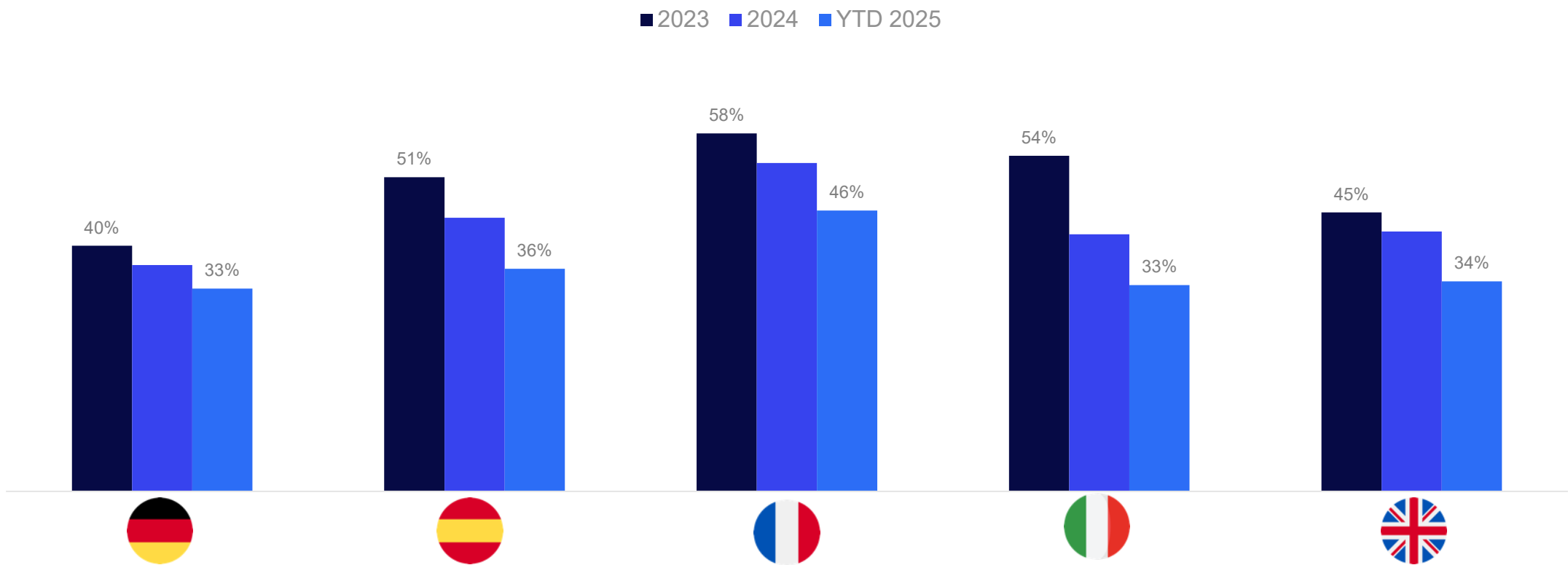
Online Fashion – Second Hand excluded



Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing & Shoes. Data ending 28 September 2025.

The D2C distribution channel has been the main driver of Nike's losses in eCommerce over the past two years

Share of Nike's DTC website in its total value sales
Online Fashion (Clothing and Shoes) – Second Hand excluded

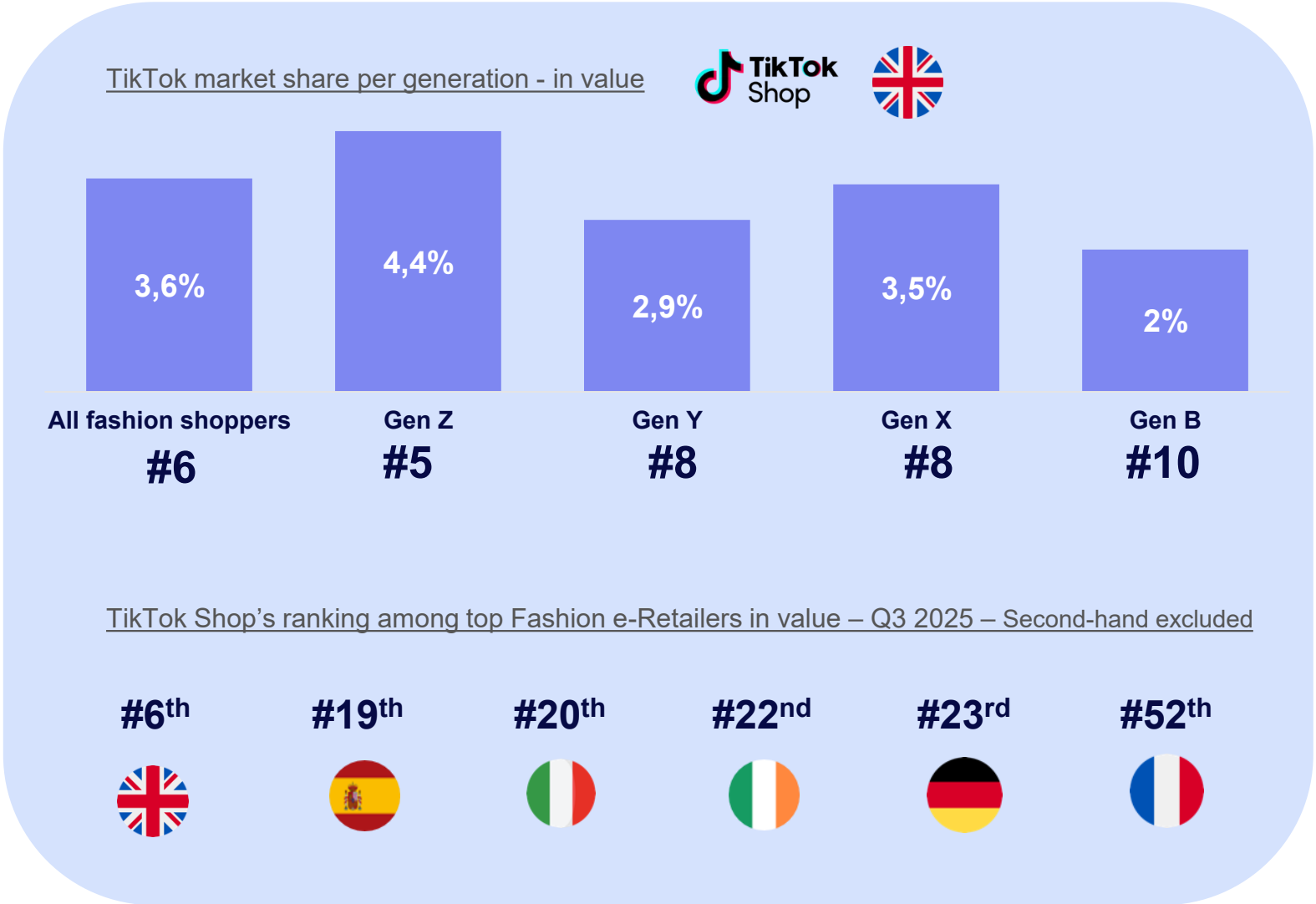


Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing & Shoes. Data ending 28 September 2025.

Unveiling eCommerce's latest trend: Social commerce



TikTok Shop has become a major player in the UK and recently ranked among the top 30 e-retailers in other European markets



Source: NIQ Digital Purchase e-commerce consumer panel. Fashion: Clothing & Shoes. Data ending 05.10.2025

NIQ *Digital Purchases*

Harnessing the power of the world's largest online consumer panel, this advanced e-commerce data platform provides brands with rich digital shopping insights, enabling a deeper understanding of their market landscape, competitive dynamics, and consumer behavior.

How can NIQ Digital Purchases support you?

Ask us!

