

# Physical stores have more influence than any single digital channel in driving fashion discovery

Article

Though the cumulative impact of online channels is undeniable, consumers are still most likely to learn about new brands and products from visiting stores.

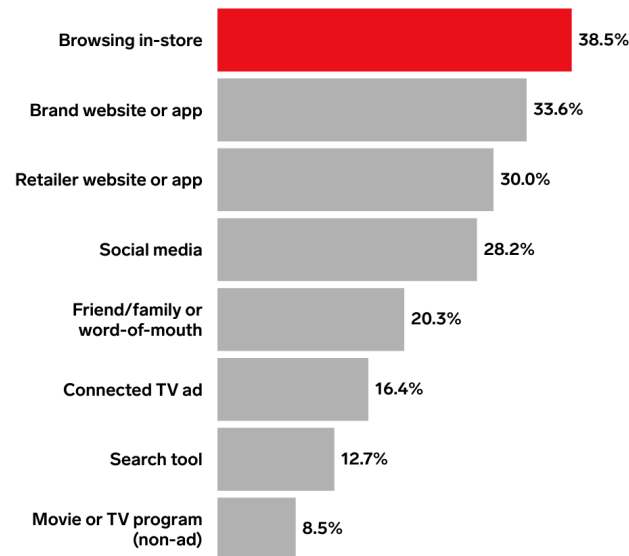
## Physical retail has the overall advantage for upper-funnel awareness

- **Consumers are most likely to discover clothing by browsing in-store.** Nearly 40% of clothing buyers in our survey learned about new fashion products by visiting a physical store. The ability to see and try on products in person still has no comparable virtual equivalent.
- **Owned digital channels also matter greatly.** Brand websites/apps were the No. 2 most influential for driving awareness, followed closely by third-party online retailers. These ranked above social media and word-of-mouth for introducing new products.

### Stores Are the Single Most Influential Channel for Discovering Clothing Brands or Products

% US clothing buyers, Sep 2023

Q: Think about the new clothing brands/products you purchased. Where did you first see or hear about it? Select all that apply.



Note: n=858; top 8 responses; margin of error is +/-3.3 percentage points; \*clothing buyers are those who discovered and purchased a new clothing product within the past 6 months  
Source: Insider Intelligence | eMarketer Survey, "US Consumer Path to Purchase," Nov 2023

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Insider Intelligence | eMarketer

## The top of the funnel looks different by generation

- **Gen Z shoppers discover more broadly.** For this group, stores, brand websites/apps, and social channels were essentially tied for new clothing product discovery.

## Digital Channels Drive More Fashion Discovery Among Millennials Than Stores Do

rank based on % of US digital buyers who selected each channel, by product category, Sep 2023

🔍 Think about the following categories of new brands/products you purchased. Where did you first see or hear about them?

👕 CLOTHING		
Gen Zers	Millennials	Total
1 Browsing in-store	1 Brand website or app	1 Browsing in-store
2 Brand website or app	2 Social media	2 Brand website or app
3 Social media	3 Browsing in-store	3 Retailer website or app

👟 SHOES		
Gen Zers	Millennials	Total
1 Browsing in-store	1 Brand website or app	1 Browsing in-store
2 Brand website or app	2 Browsing in-store	2 Brand website or app
3 Social media	3 Social media	3 Friend/family or word-of-mouth

🛍️ ACCESSORIES		
Gen Zers	Millennials	Total
1 Browsing in-store	1 Connected TV ad	1 Browsing in-store
2 Brand website or app	2 Retailer website or app	2 Retailer website or app
3 Retailer website or app	3 Brand website or app	3 Brand website or app

Note: among those who purchased a new product in each category within the past 6 months; total ages 15-77; clothing total n=858; shoes total n=629; accessories total n=391; Gen Zers were ages 15-26, millennials were ages 27-42; top 3 responses shown; margin of error is +/-3.3 percentage points

Source: EMARKETER Survey, "US Consumer Path to Purchase," Nov 2023

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EMARKETER

- **Stores have less pull among millennials.** Brand websites/apps and social media channels trumped physical retail by a significant margin for apparel. Connected TV (CTV) ads had about as much influence as store channels for clothing; it was also the top channel for accessories.

## How should fashion brands and retailers balance online and brick-and-mortar strategies?

- **Don't underestimate the power of the store.** Even pure-play online retailers like Shein have recognized the value of physical retail. The fast-fashion brand has hosted numerous pop-ups across the US to generate marketing buzz. And thanks to an investment deal with Forever 21, Shein has expanded its ability to showcase products in newer categories, such as home goods, through the US retailer's physical outlets.
- **Tailor digital marketing to drive discovery on the appropriate channels.** Brand-owned channels and social carry relatively more weight among consumers under the age of 45. New opportunities in targeted CTV advertising may prove valuable in connecting millennials, in particular, with fashion brands and retailers.

Report by Sky Canaves Mar 13, 2024

# US Fashion Ecommerce 2024

