



Future of e-commerce in Fashion

Understanding the e-commerce fashion consumer
of the future through advanced analytics



June 2025



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from 2020 to 2024
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01

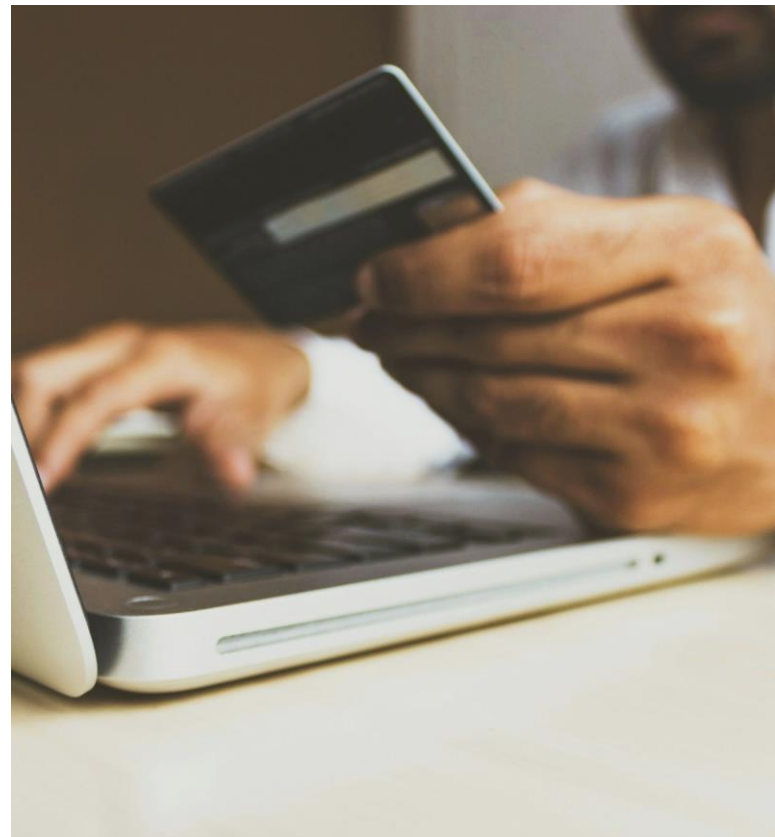
Introduction, Objectives & Methodology

June 2025

Introduction, Objectives & Methodology

This collaborative study by Deloitte and Google, executed from late 2024 into early 2025, merges their industry expertise to analyze the past and project the future evolution of e-commerce within the Fashion and Food & Beverages sectors.

It seeks to understand how online penetration, consumer behavior, and industry performance have changed, and how they will continue to develop through 2030. The primary goal is to provide a transformative roadmap for retailers in these industries, enabling them to adapt and thrive amidst upcoming trends. The study is organized into four core sections.



Intro into e-commerce as a whole, and the potential of Fashion and Food & Beverage as industries:

Fashion

- **Significant paradigm shift in Fashion.** Analysing the evolution of the Fashion industry by category, type of player and market
- **The future of e-Commerce in Fashion.** Forecasting the evolution of the sector, emerging trends and new search patterns
- **How to navigate the transformation.** In-depth analysis and experts' recommendations on future perspectives on Fashion

F&B

- **Significant paradigm shift in Food & Beverages.** Analysing the evolution of the Food & Beverages industry by category, type of player and market
- **The future of e-Commerce in Food & Beverages.** Forecasting the evolution of the sector, emerging trends and new search patterns
- **How to navigate the transformation.** In-depth analysis and experts' recommendations of future perspectives on Food & Beverages



This study acknowledges significant global uncertainties like the tariff war, geopolitical conflicts, climate change, and potential health or economic crises. While their precise impacts aren't quantified, these unpredictable factors will undoubtedly heighten industry challenges. Similarly, unquantified elements include online behavioral shifts from global pandemics like COVID-19 and currency fluctuations against the Euro.



Our historical analysis spans 2017-2024, using 2023 data to contextualize COVID-19's impact, as recovery varies regionally. To ensure an unbiased view of Fashion and Food & Beverages' evolution, future projections extend five years to 2030, bypassing the unquantified effects of the pandemic and current economic crises

Introduction, Objectives & Methodology

For the preparation of the study, a methodology structured into 5 steps has been followed:

01

Definition of the analysis scope: Top 10 European countries per vertical and focus on the Fashion (non-luxury) and Food & Beverages categories, as they are consistently ranked in the top 5 ecommerce sellers over the past five years.

02

Understanding of historical data: Detailed analysis of e-commerce evolution in Fashion and Food & Beverages across 10 European markets from 2017 to 2024. This identified key e-commerce trends, market potential, and changes in consumer behavior and revenue, providing insights into industry patterns.

03

Definition of relevant variables: Identification under 50 influential variables for Fashion and Food & Beverages, encompassing macroeconomic factors (e.g., income, internet penetration), player types (e.g., pure players, quick-commerce), and emerging trends (e.g., AI, new search behaviors).

04

Modelling and selection of key variables: Regression model for long-term e-commerce penetration forecasts in Fashion and Food & Beverages, using historical data and significant identified variables to predict future growth across categories, subcategories, and markets, thus enhancing our understanding of industry dynamics.

05

Validation of results and vision for 2030: Models developed were evaluated for accuracy, and the future of e-commerce in Fashion and Food & Beverages by 2030 was predicted. Given the long-term nature of the estimate, figures have been rounded.



Sources utilized for this paper's development include:

Deloitte: Conversations with subject matter experts on the industry and leveraging prior market studies and research.

Google: This paper leverages Google search query data on customer behavior and preferences across all Fashion and Food & Beverages subcategories within the 10 key study markets.

External sources: Public data available from recognized institutions in the sector regarding economic and industry indicators (e.g., Statista, Euromonitor International Limited [2023] © All rights reserved, Gartner, Inc., Alimarket,...).

Introduction, Objectives & Methodology

Future of Retail - Fashion



European Coverage
10 analyzed countries



Advanced analytics
& predictive models



Third Party Data
Statista, SimilarWeb,
Data.ai etc.



Multi Billion
Google Queries & Search
and YT datapoints



Date Breakdown
Age, Location,
Gender, Generic vs
Branded etc.

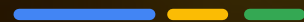


Data Breakdown
Google Metrics (CPCs,
Ad Depth etc.)



02

The Evolution of E-Commerce & Fashion: from 2019 to 2024



June 2025

E-commerce: Future-proofed, yet challenged. COVID and innovation have boosted e-commerce, but hurdles persist



Convenience & Personalization

24/7 shopping and vast product availability, coupled with personalized experiences, continue to elevate the customer journey



Global & Efficient Reach

Businesses can serve a worldwide audience, reducing the need for customer facing capital & labour



Supply Chain Optimization

AI-driven delivery forecasts, advanced logistics, and real-time tracking enhance speed and reliability



Tightening Margins

Intense competition, price transparency, and high last-mile delivery costs lead to narrow profits online



Localization & GTM Costs

Global reach introduces a maze of international shipping, customs duties, import & export regulations etc. as well as localization challenges

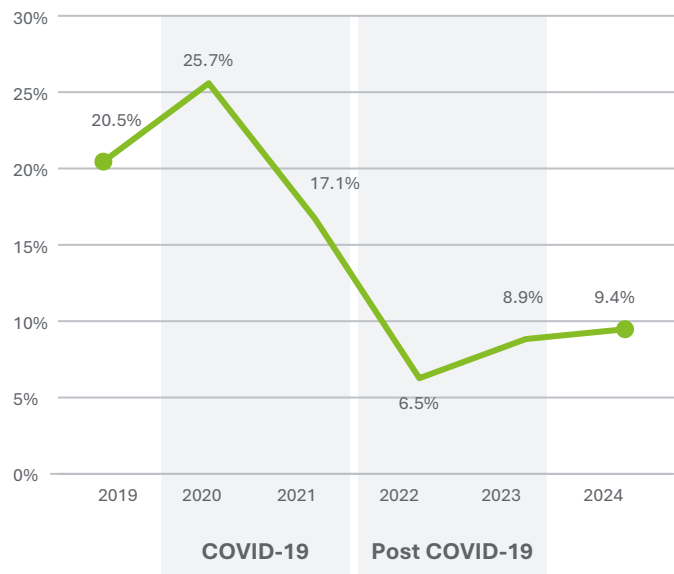


Logistical Complexity

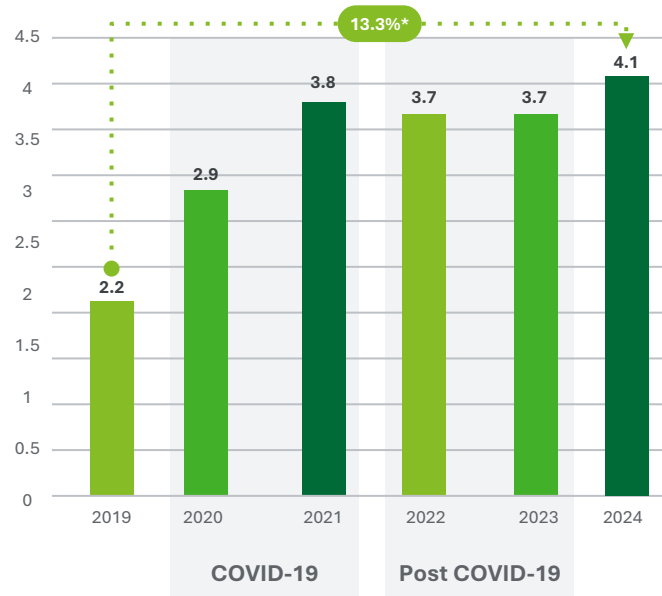
In fashion, the industries faces high return rates. In food & beverages, perishability & quality control increase costs

COVID imposed costs & disruption on the e-commerce industry; building momentum towards a permanent transformation that is currently occurring

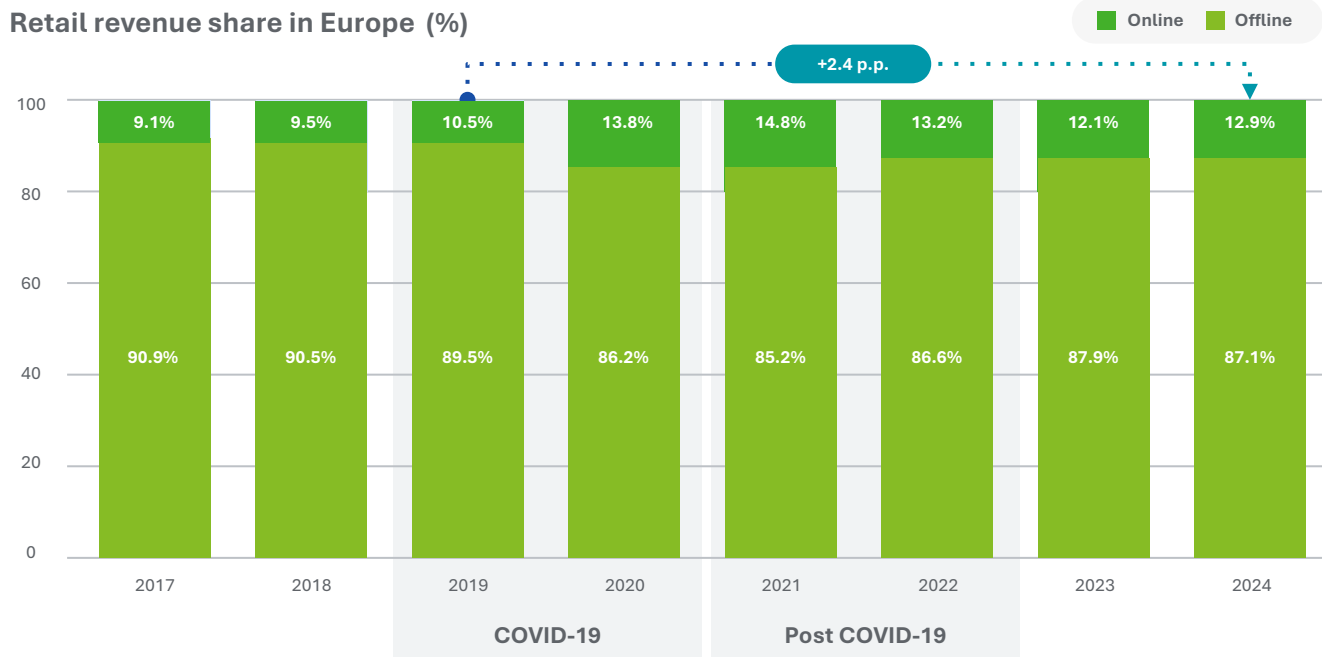
Sales growth in retail e-commerce from 2019 to 2024 (%)



Retail e-commerce revenue from 2019 to 2024 (trillion US dollars)

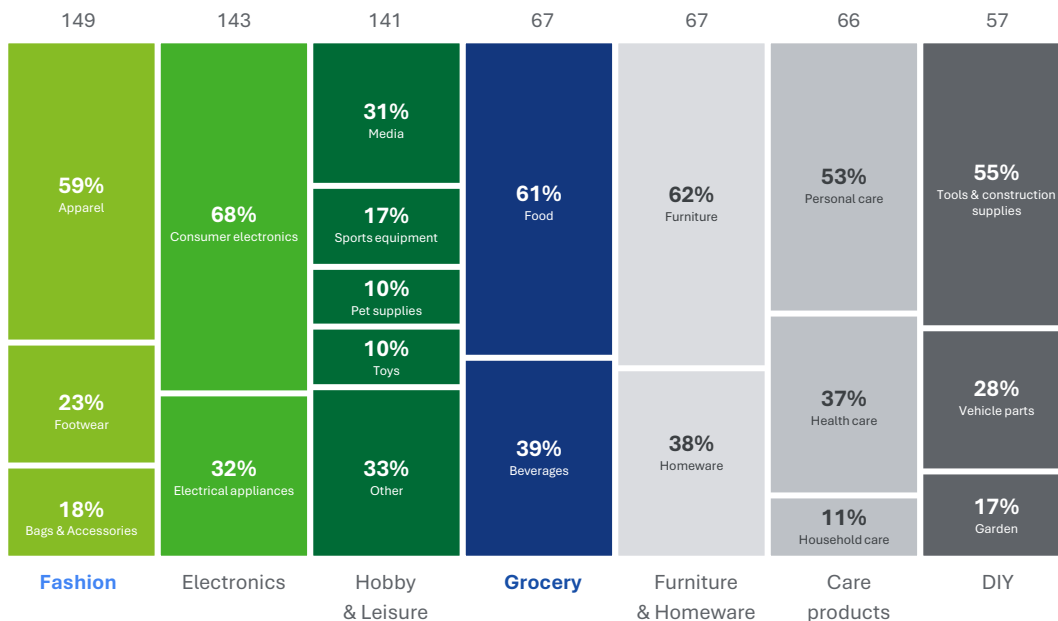


Online sales surged by 5% of total revenue share during COVID. Offline has gained some traction back; but the impact of COVID will be lasting



Fashion and Food & Beverage are two of the most important online categories, with the highest growth over the last 5 years

E-Commerce Revenue Development in Europe, in Billions US\$



Fashion

- High AOVs & emotionally driven purchases
- High levels of engagement & brand building
- Largest expected industry disruptions with AI & other innovations
- Global reach & expansion opportunities



Food & Beverage

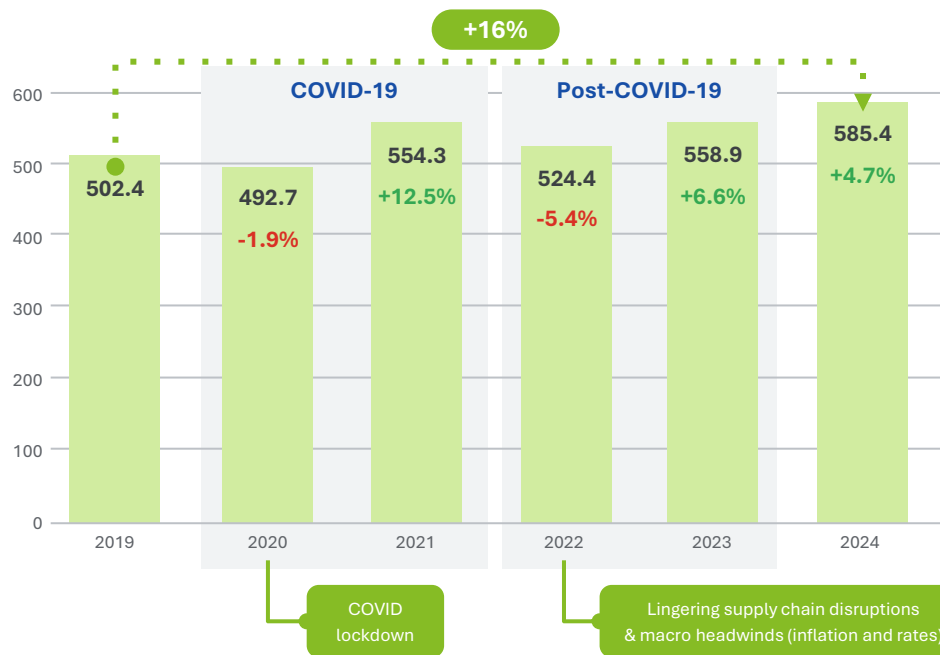
- Essential & high-frequency consumption
- Rapidly evolving dietary trends (plant-based, healthy eating etc.)
- Convenience focused industry
- Untapped potential due to logistical complexity (perishability, cold chain, last-mile)

A Deep Dive into Fashion



Fashion grew 16% in the last 5-years, despite two sluggish years in 2020 (COVID) and 2022 (macro-headwinds)

Fashion Revenue by Year (Billions \$ USD)



“

Sales in physical stores increased substantially while online continues to do well. This shows the value of having both physical and digital channels [growing] which strengthen and complement each other.”

Helena Helmersson, CEO of H&M.

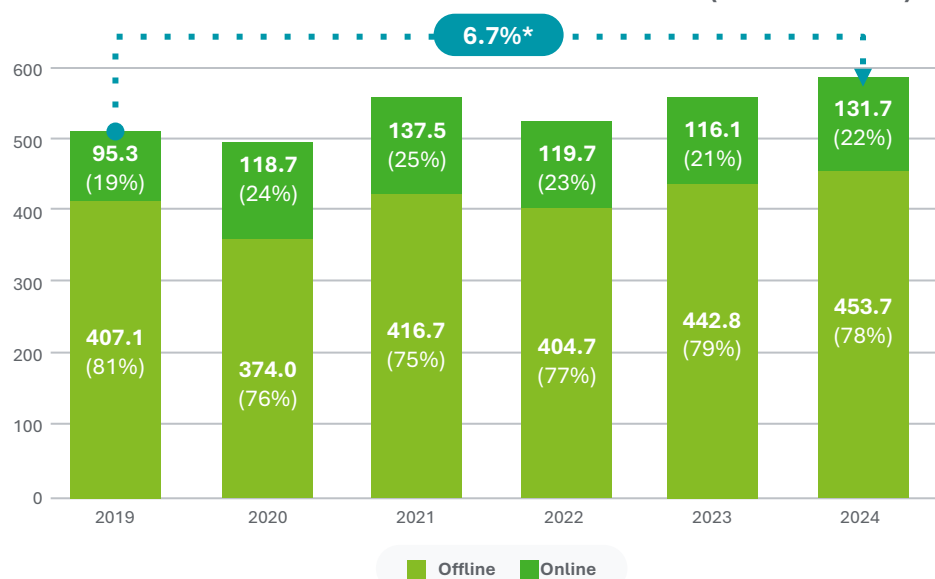
COVID-fueled CapEx and shifting consumer habits permanently propelled online fashion, enabling its gradual capture of offline market share

“

Our customers are able to make their fashion and shopping decisions when and where it suits them best, something that was unthinkable just a few years ago; [thanks to our] extraordinary ability to innovate”

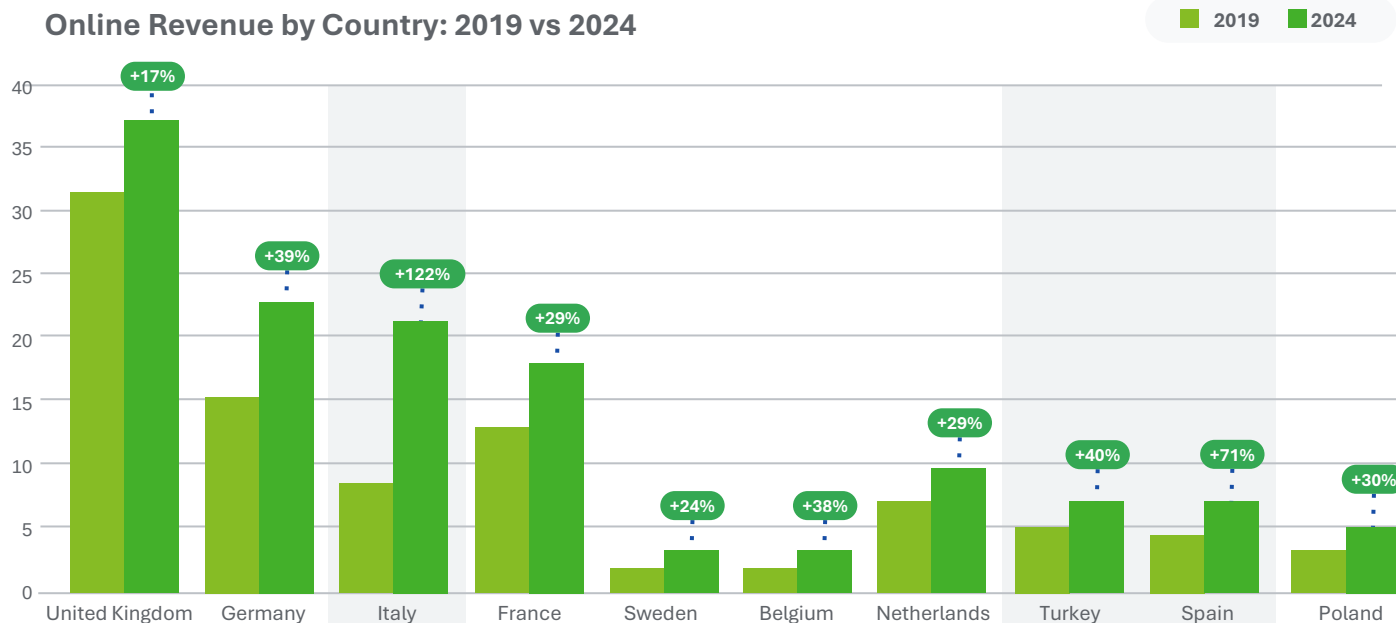
Pablo Isla, Executive Chairman of Inditex,
public comments, 2021

Evolution of Online and Offline Revenue Growth (Billions \$ USD)



Europe's E-commerce Growth Story: UK/DE lead value growth, Southern Europe shows explosive percentage gains

Online Revenue by Country: 2019 vs 2024

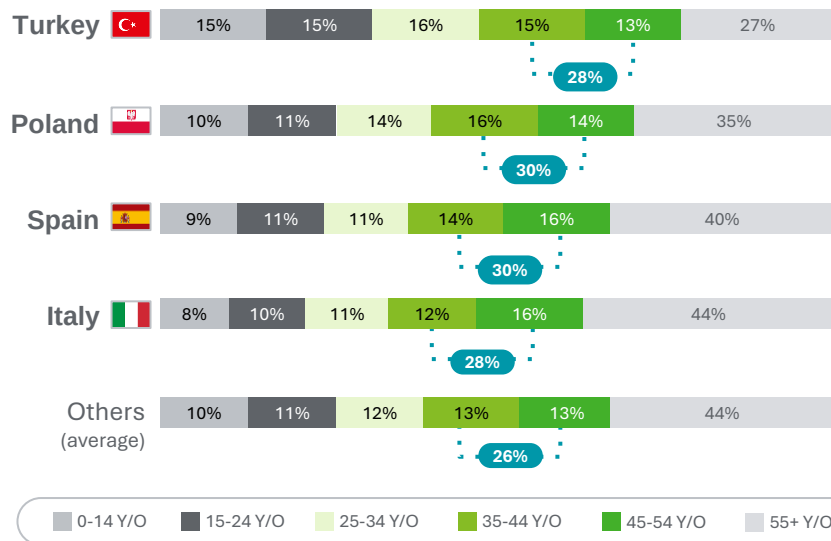


Physical stores are now strategic hubs:

Showrooms for online
Browse, pickup (BOPIS/Click
& Collect), and returns,
blurring online/offline

Growth has been driven by a population that grew up learning the internet now spending on it; we are all digital natives now

Population Structure per Country (2024, % of Population)



Growth Drivers



Internet Penetration

Countries that grew the most in online fashion; also experienced the highest growth in internet penetration



Middle-Age Bracket (35-54)

Countries with the highest online revenue growth have a higher percentage of their population aged 35-54



Consumer Spending

Countries that fared best economically & grew in consumer spending (IT, ES); grew most in e-commerce for fashion

IT, ES and TK have grown for 5 years due to headroom, value-seeking and fashion-driven local cultures



Large Sizes, More Headroom

- IT, ES and TK are now developing and becoming mature quicker, after suffering from:
 - Economic crisis
 - Complex topography for digital infrastructure rollout
 - Regulatory hurdles and bureaucracy
- COVID allowed for an aggressive shift in connectivity; setting permanent cornerstones for development



Local Fashion Culture & Tourism Rebound

Local fashion rebounded thanks to tourism booming, reaching pre-pandemic levels. This allowed:



ES Native omni-channel businesses like Inditex & Mango to flourish



TK The manufacturing hub to grow, with local shops set up to sell abroad, while seeing the emergence of fast-fashion players like



IT Cultural style & fashion values to rebound with an increase in disposable income



Lower Income EU Countries & More Value-Seeking

- Italy, Spain and Turkey are particularly value-seeking as consumer markets; Italy ranks price as a top purchase driver⁽¹⁾, when under financial stress. Similarly, Spain has a highly bargain focused culture, with 75% of shoppers looking for a bargain before buying⁽²⁾

03

The Future of E-Commerce in Fashion by 2030

June 2025

Google



The Future of Fashion



Our 2030 predictive model incorporates a set of sophisticated variables to explain the future of e-commerce fashion

Socio-demographic



Population structure (%)

Percentage distribution of the population by age clusters: 0-14 / 15-24 / 25-34 / 35-44 / 45-54 / +55 age segments.



Household income

Average total income of households in a specific market.



Total population

Total number of people living in a geographic area.

Marketing and Search



Search Queries

Total textual inputs entered by a user into a search engine or platform.



Impressions

Number of times a piece of content is displayed on a user's screen, regardless of whether it was clicked or interacted with.



Average CPC

Average cost paid for each click on an ad.

Performance



Ad Depth

Average number of ads displayed per search or results page.



Total investment

Total spending on advertising campaigns through Google channels.

Macroeconomics



Consumer Price Index

Indicator that measures the evolution of prices for consumer goods and services.



Revenue per capita

Income generated divided by the number of inhabitants

We predict e-commerce
in fashion to grow **77%**



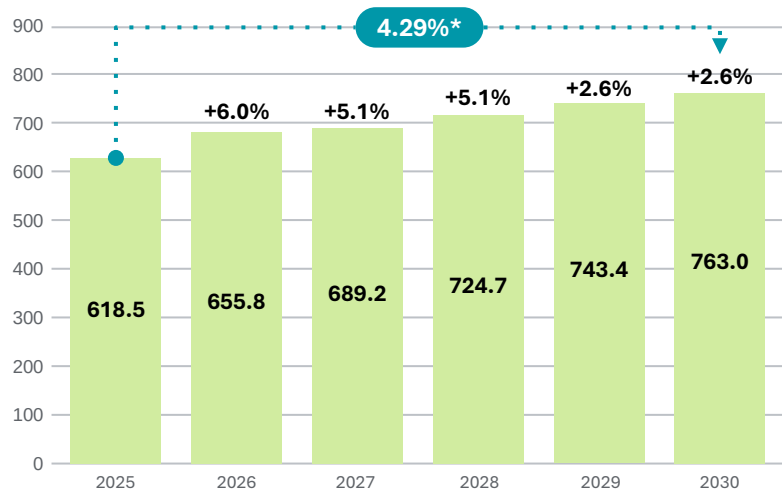
**Reaching
\$233 Billion** by 2030



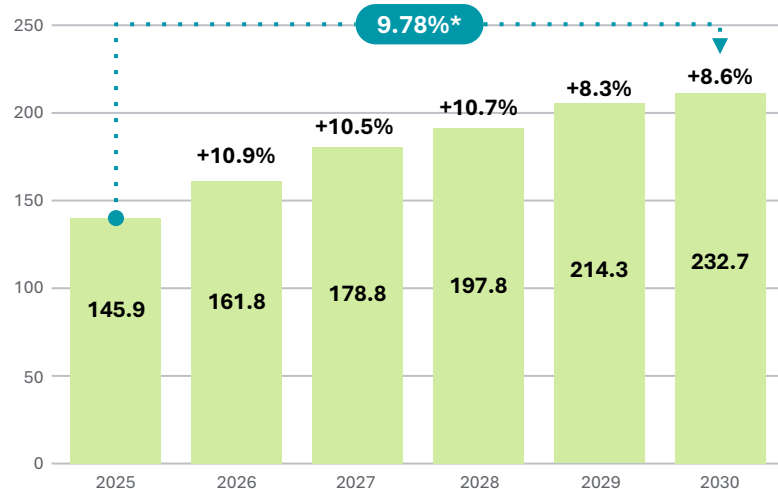
We forecast a ~10% yearly revenue uplift to 2030 in fashion e-commerce, outgrowing offline by 5%

Yearly e-commerce growth rates range between 8% and 11%, with the most upside expected between 25' and 28'; followed by a slow down between 28' & 30'.

Fashion Revenue Forecast by Year (Billions \$ USD)



Fashion Online Forecast by Year (Billions \$ USD)

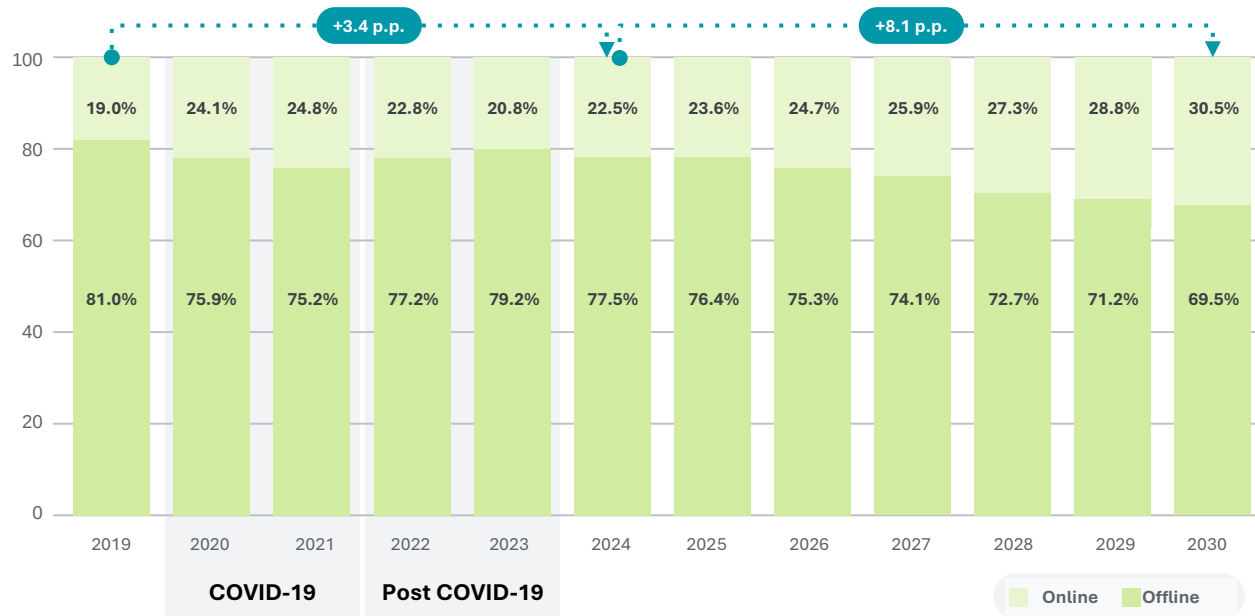


Growth rates to stagnate due to:

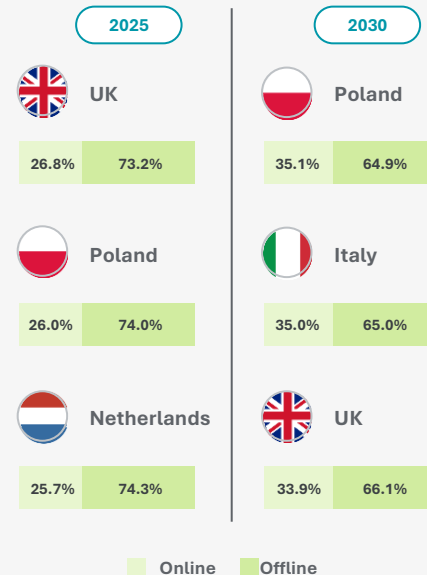
- Market maturation & saturation
- Hybrid retail-model dominance
- Regulatory & privacy limitations in the AI-landscape

By 2030, omnichannel will be at the core of fashion; with online reaching a total of 30% of revenue

Forecast Split (Online vs. Offline):

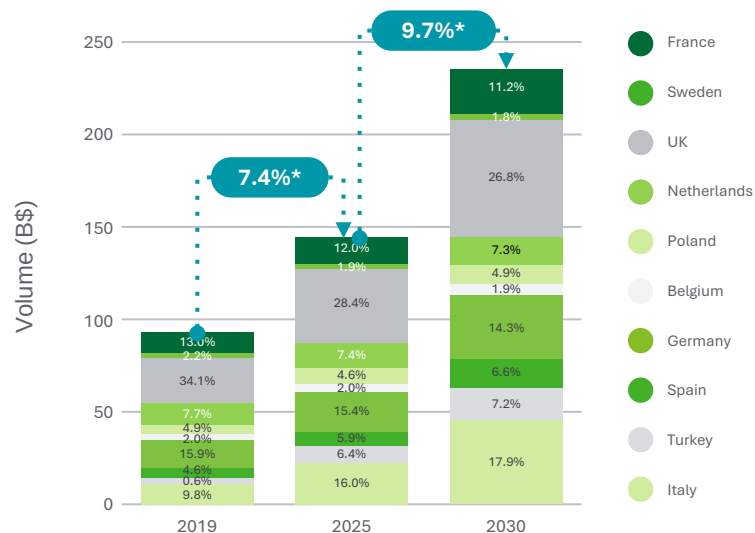


Top 3 markets in Online Share:



Turkey, Italy, and Spain will continue to be the markets that show the highest online growth, each with a projected 12% CAGR

Online Revenue Forecast Growth by Country:



CAGR
2019-2025

6.01%

4.12%

4.18%

6.56%

6.01%

7.53%

6.80%

12.08%

9.19%

16.43%

CAGR
2025-2030

8.18%

8.99%

8.48%

9.57%

11.23%

8.99%

8.21%

12.24%

12.57%

12.27%

CAGR (%)

Volume (B\$)



Spain

12.24%

15.47



Turkey*

12.57%

16.79



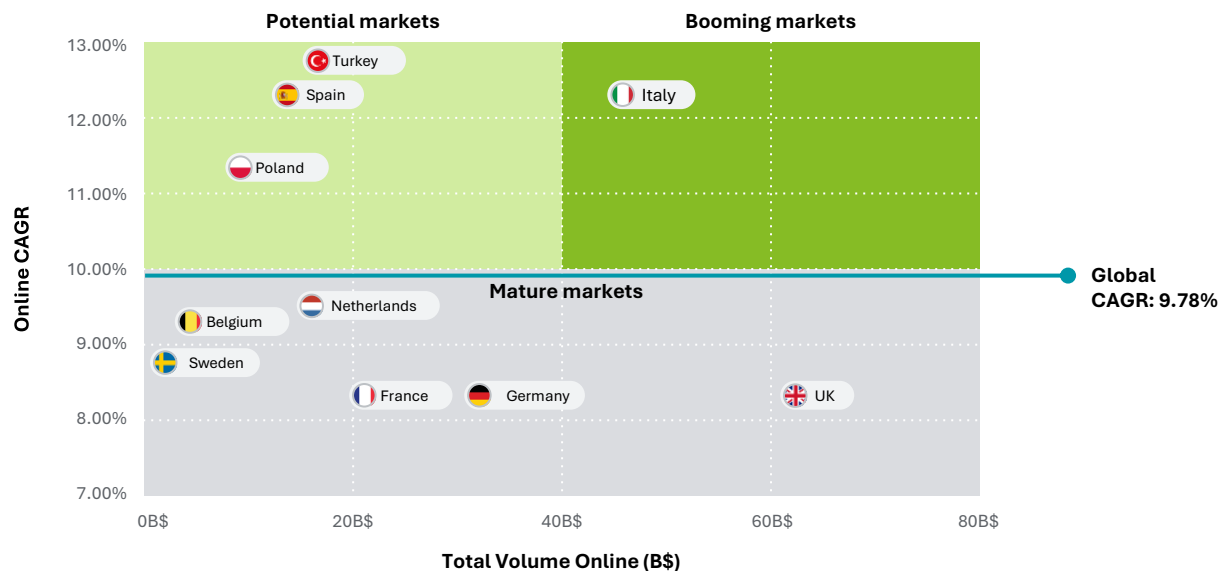
Italy

12.27%

41.68

***Disclaimer:** Currency fluctuations relative to the euro have not been incorporated into the model. As a result, there is an inherent risk that a potential depreciation of the Turkish lira may adversely impact and distort the outcomes of the analysis.

We forecast Italy to become even more significant in online fashion than it is today; with the UK still leading in absolute size



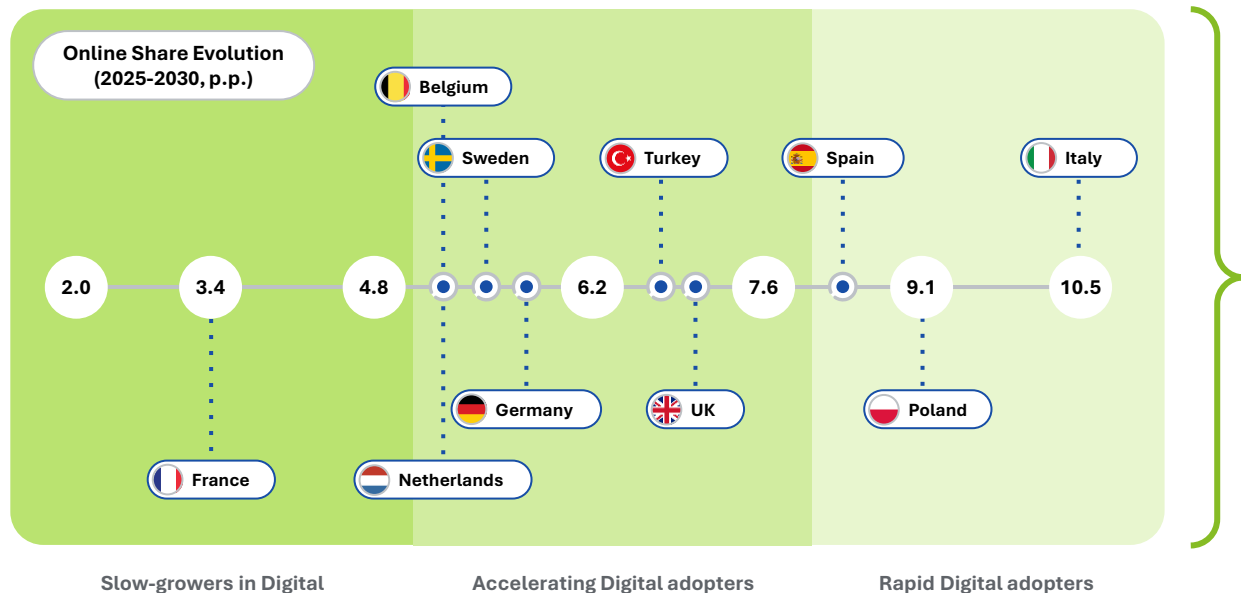
Italy

Italy to become the second biggest fashion market by 2030 due to:

- Headroom to grow in digitalization metrics
- High cultural spending patterns vs saving
- Fashion as a cultural pillar in Italy

With some countries reaching over 35% online share by 2030, it becomes even more important to have a unified message, with one brand, across online and offline

Online-Offline Share Forecast Growth by Country:

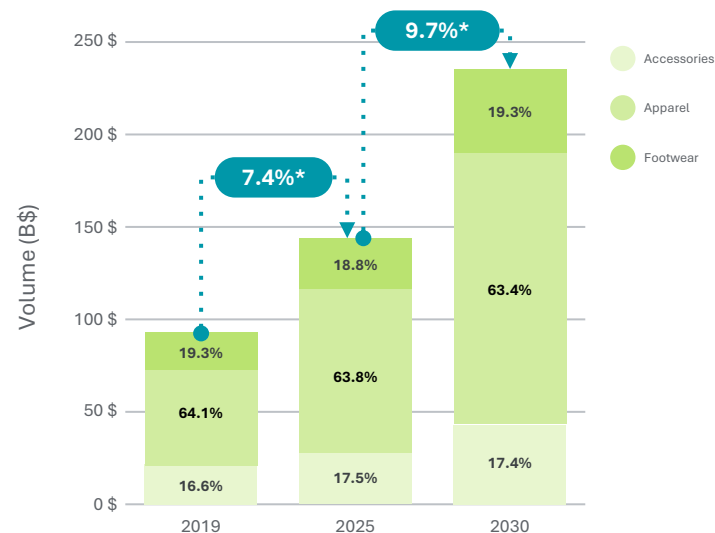


Online Share 2030 (%)

	Poland	35.1%
	Italy	35.0%
	UK	33.9%
	Netherlands	30.9%
	Spain	28.5%
	Turkey	28.1%
	Germany	26.8%
	France	26.6%
	Sweden	24.6%
	Belgium	22.5%

While Apparel will still be the largest in size we expect Footwear to grow faster in the next years

Online Revenue Forecast Growth by Subcategory I:



Volume and CAGR (%) by Subcategory I

	Volume 2030 (B\$)	CAGR (%) 2025-2030
Accessories	40.478	9.69%
Apparel	147.408	9.63%
Footwear	44.780	10.34%

CAGR 2025/ 2030 (%) by subcategory I (Top 3 fastest growing markets)

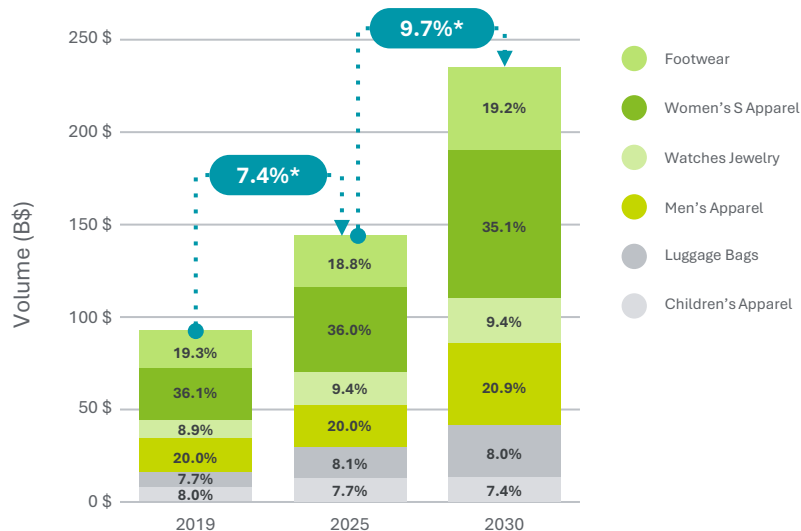
	CAGR (%) Turkey	CAGR (%) Spain	CAGR (%) Italy
Accessories	11.82%	12.90%	12.47%
Apparel	10.11%	10.21%	10.37%
Footwear	11.32%	9.36%	9.52%

Why Footwear will outgrow other categories:

- More standardized fit & size across brands
- Lower returns & associated costs
- More effective use of visuals and immersive tech
- Higher average selling price justifies shipping cost

Rapid growth in men's fashion contrasts with the immense & mature women's market requiring hyper-accuracy

Online Revenue Forecast by Subcategory II



Ranking by CAGR 2025-2030

	CAGR 2019-2025	CAGR 2025-2030
01 Men's Apparel	7.4%	10.7%
02 Footwear	6.8%	10.3%
03 Watches Jewelry	8.3%	9.9%
04 Luggage & Bags	8.3%	9.5%
05 Women's Apparel	7.3%	9.2%
06 Children's Apparel	6.7%	8.8%
Avg.	7.5%	9.7%

Ranking by Volume

	VOLUME (B\$) 2030
01 Women's Apparel	81.717
02 Men's Apparel	48.530
03 Footwear	44.780
04 Watches Jewelry	21.877
05 Luggage & Bags	18.600
06 Children's Apparel	17.161
Avg.	38.777

Footwear includes Leather, Sneakers and Textile.

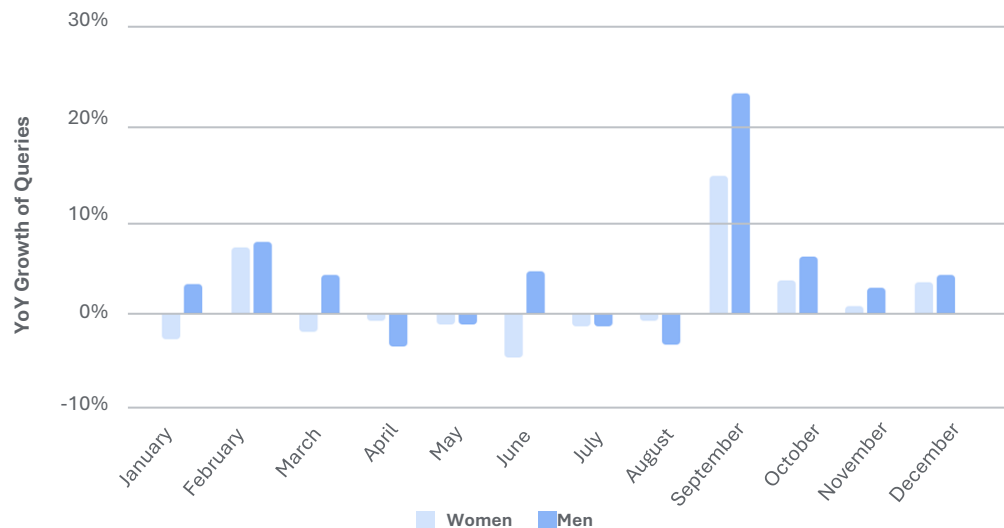
In six of the ten analyzed markets; Men's Apparel has the highest expected CAGR to 2030

Top 10 fastest online growing countries by 2030

RANKING	Country (Online revenue)	RANKING (Var. vs 2024)	CAGR 2025-2030 (Desv. vs average*)	TOP 3 SUBCATEGORY* (Based on CAGR 2025-2030)
#1	 United Kingdom	=	-1.6 p.p.	Children / Women / Footwear
#2	 Italy	+1	+2.2 p.p.	Women / Watches / Men
#3	 Germany	-1	-1.9 p.p.	Men / Footwear / Luggage
#4	 France	=	-1.9 p.p.	Men / Footwear / Luggage
#5	 Netherlands	=	-0.5 p.p.	Footwear / Men / Luggage
#6	 Turkey	=	+2.5 p.p.	Men / Footwear / Watches
#7	 Spain	=	+2.2 p.p.	Watches / Women / Luggage
#8	 Poland	=	+1.2 p.p.	Men / Watches / Footwear
#9	 Belgium	+1	-1.1 p.p.	Watches / Footwear / Luggage
#10	 Sweden	-1	-1.2 p.p.	Watches / Footwear / Luggage

We are already seeing this play out, with the YoY growth of Google demand for men's clothing outpacing the women's category in 10 out of 12 months in 2024

Searches for Men's Clothing vs Women's Clothing
(YoY Growth of Queries), 2024, EMEA



Men category growing faster due to:

- Newfound focus on personal style among men
- Impact of new categories, like streetwear and athleisure on men's style

04

How to Navigate the Transformation

June 2025

Capturing that online growth will require new thinking; as customer journeys are becoming tougher to interpret

... more scrutiny



Seeking Confidence: prioritizing finding the right trip for their needs.

... more consideration

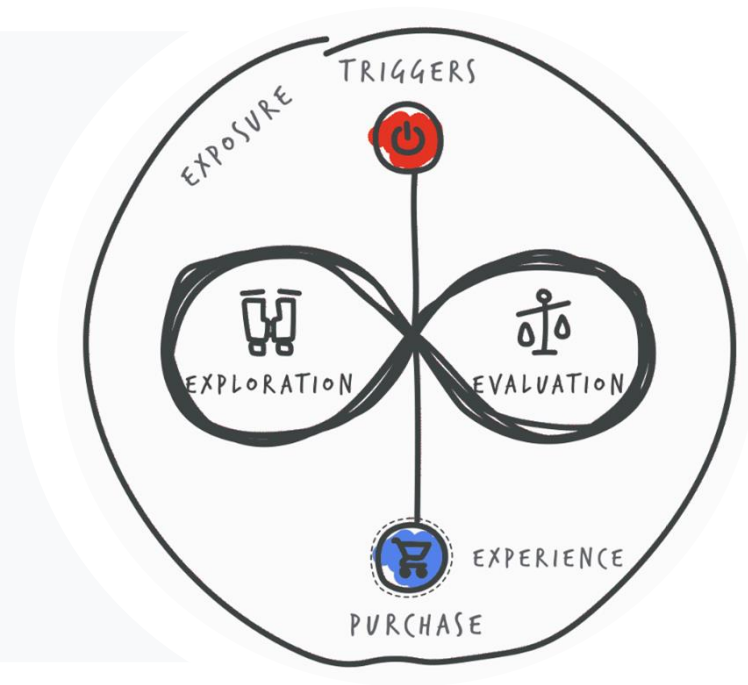


Expanding Options: exploring a wider range of brands and destinations.

... more exploratory



Thorough Research: investing more time and effort in their research process.



We're experiencing on online data “deluge”; omnichannel data collection is imperative



Searches are longer

1.5x faster volume growth for queries five or more words vs. shorter queries¹



Information overload

2 in 3 consumers delay or avoid making decisions when faced with too many options or information²



More touchpoints

The average shopper has 10 touchpoints on their journey to purchase³

With some countries reaching 35% of online sales; embracing a unified strategy for future e-commerce success will be key

Current Marketing



Measuring & optimizing digital media toward online-only KPIs,



Capturing demand via online signals, missing offline intent



Limited, or only “after the sale” alignment between offline and online

Future Marketing



Offline marketing

- Ensure up-to-date messaging on physical footprint
- Adopt measurement best-practice to capture offline signals
- Align KPIs with online approach



Online marketing

- Ensure consistency between look and feel, values and intent of your brand between in-person store experiences and web / mobile
- Unify marketing objectives, to drive traffic to store when more valuable while maximising ecommerce revenue

The Store Reimagined: With fashion still being highly sensory and emotional, the store will have to become more than a mere P.O.S



The Store's Evolved Purpose

- Fulfilment (Click & Collect, Local Delivery)
- Experience (Events, Fashion Shows, Community)
- Service (High-Touch Support, Styling Advice, Made-to-Measure etc.)



Tech-Infused In-Store Experiences

- App-guided Exploration: In-store navigation & recommendations
- Interactive discovery: Digital lookbooks, QR codes, virtual try-ons
- Frictionless checkout (Scan & Go, Mobile POS)



Unified Data & Operations for a 360° View

- 360° Customer View (Online + Offline)
- Synced Operations (Real-time Inventory)
- Phygital Marketing (e.g., PMax for store goals links online to in-store)

A “Phygital” store approach creates superior experiences, allows for more operational agility, and drives sustained retail growth



In mature fashion categories like Women's Apparel where expectations are high; **enhanced customer engagement is crucial** unlocking growth:



Hyper-Personalization



Automated Creative Production & Customization



Retailtainment & Gamification of the User Journey



Moving from generic segmentation to individual segmentation & experiences

With evolving expectations; curated experiences for customers will be required to grow your business:



Individual Clothing Styles

Seamlessly cater to precise fashion tastes & requirements



Convenience & Time Optimization

Fashion platforms will have to learn customer routines & streamline shopping: quick delivery solutions; in-store pick up etc.



Ethical Values Alignment

Retailers will need to supply options that reflect the ethical commitments of their customer base, such as sustainability or local sourcing

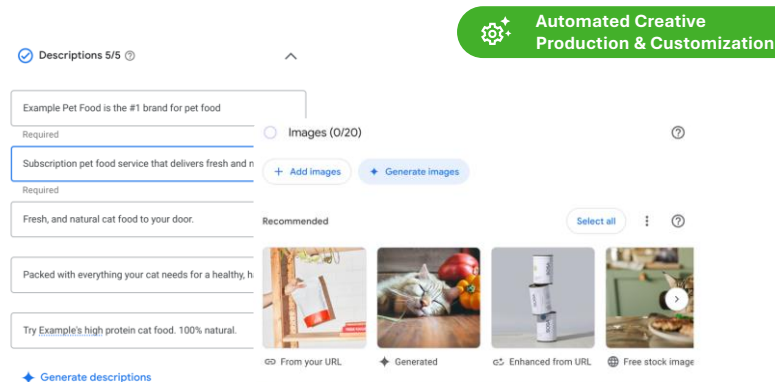


Occasion-Based Curation

Shoppers will look for personalized suggestions that align not only with style, but occasions, moods & events (eg: weddings)

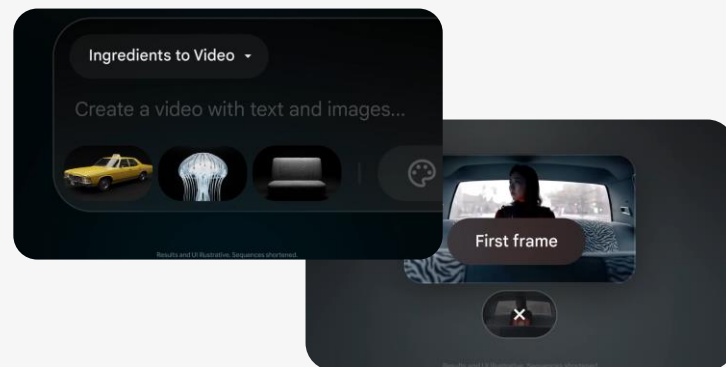
Solutions today...

Serving tailored creative based
on what connects and converts
the target audience



The tools of the future...

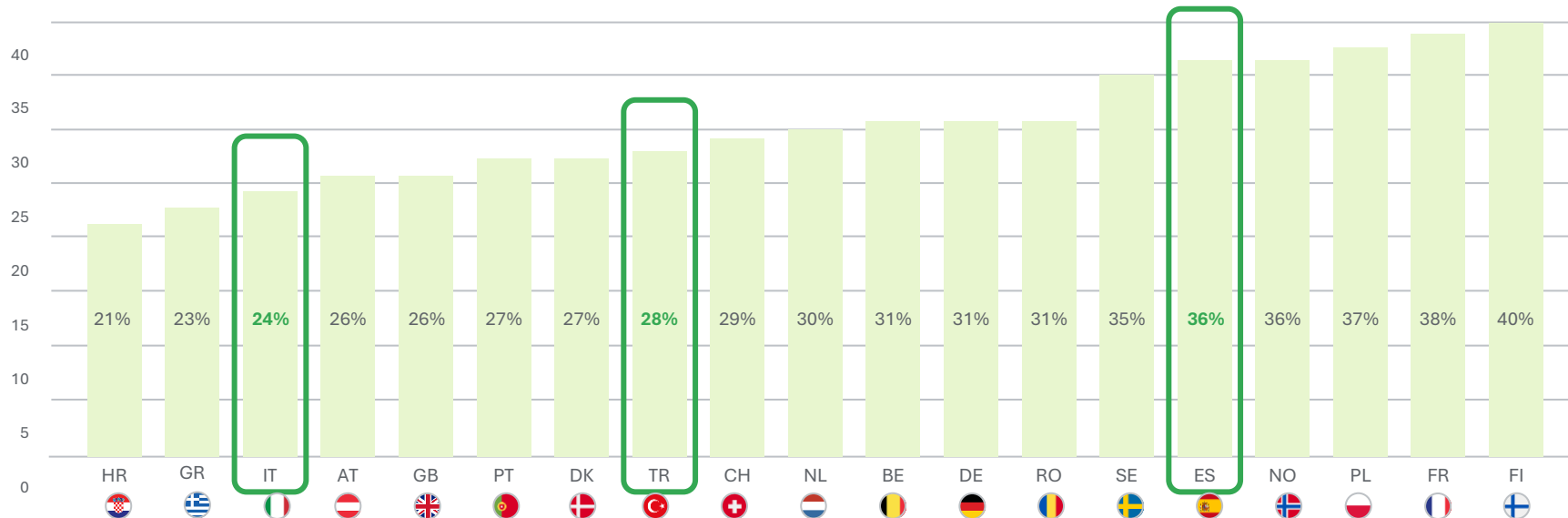
Unlock growth by converting your assets
into scalable, high-impact creatives
at a fraction of the traditional cost





Engage New Consumers: Retailtainment, especially in Spain, is Crucial for Fun and Future Shopping Experiences

Q: Why do you browse? Just browsing for fun, not looking for anything in particular



Smart Shopper Research. Google, Cint (2024), Online survey, Country: Cross EMEA market insights. Nationally representative online population 18+Y.O who conducted purchases in the past 3 months for Consumer Electronics/Home & Garden/Fashion/Toys/Jewellery and in the past 1 month for Food & Groceries/Beauty. Base 2024: All product buyers of CE, Home, Fashion, Food, Beauty, Toys, Jewellery n=54828. Q13_D: Thinking about when you're gathering inspiration about products to buy, in general, what proportion of your time do you spend doing the following?

Strategic Imperatives for E-commerce Fashion by 2030



Macro Trends as Market & Category Maker

Anticipating macro-level country & category trends to target high demand & margin geos and categories.

1



Hyper Personalization as a Sales Boost

Using 1PD & 3PD to tailor your strategy to every customer differently, with innovations like “look & feel”.

3



Unifying Customer Data for Omnichannel Sales Flow

Merging online & offline measurement, bidding and optimization in a complex multi-channel environment.

2



Hyper Creativity as a Marketing Driver

Using AI tools to generate highly scalable creatives & translate assets efficiently to be more agile in your targeting.

4

05

Team & Glossary

June 2025

Our team

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Appreciation to the Deloitte and Google team who participated in the study

Deloitte Advanced Analytics

- Jorge Meneu Moreno
- Albert Miquel Ibarz

Deloitte Customer & Marketing specialists

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- Emma Salvador
- Bhavesh Sadhwani
- Gerard Moyano
- Sergio Mañanas
- Jordi Juanico

Research

- Esteban Fernández Villar
- Jason Panagiotopoulos

Glossary



Categories and subcategories

- **Category:** Classification used to group products that share similar characteristics, functions or consumer purposes.
- **Subcategory:** Classification used to group products that share similar characteristics, functions or consumer purposes.
- **Fashion Categories:** Children's Apparel, Leather Footwear, Luggage Bags, Men's Apparel, Sneakers, Textile Other Footwear, Watches jewellery, Women's Apparel.
- **Food & Beverages Categories:** Alcoholic Drinks, Baby food, Bread & Cereal Products, Confectionery & Snacks, Dairy products & eggs, Fish & Seafood, Hot Drinks, Non-Alcoholic Drinks, Oils & Fats, Sauces & Spices, Fruits & Nuts, Meat, Pet food, Vegetables, Spreads & Sweeteners.



Demographic information

- **Population:** Number of people living in a specific geographic area, such as a city, country, or the entire world. It represents the complete count of individuals residing in that area at a given point in time.



Metrics

- **Percentage points:** Measure the absolute difference between two percentages—providing a clearer view of growth or gap in share, performance, or change over time. Unlike percent change, this metric avoids confusion when comparing shifts in proportions.

Glossary



KPIs

- **Internet penetration:** Proportion of people accessing the internet during a given period, through any device or channel (mobile, desktop, tablet, etc.). It is expressed as a percentage of the total population of the territory analysed.
- **Household income:** Total combined income of all people living in a single household, regardless of their relationship to one another. This includes income from wages, salaries, benefits, pensions, investments, and any other sources of earning before taxes are deducted.
- **Consumer spending per capita:** Average amount of money spent on goods and services by each person in a specific population over a given period. It is calculated by dividing the total consumer spending in a country or a region by its total population.
- **Revenue:** Total amount of income generated by a business, organization, or individual from the sale of goods, services, or other business activities before any expenses are deducted.
- **Ad investment:** Amount of money a company or organization allocates and spends on advertising to promote its products, services, or brand.
- **Impressions:** Number of times an advertisement is displayed or appears on a screen, regardless of whether it is clicked or interacted with. Each time an ad is shown to a user, it counts as one impression.
- **Queries:** A request for information made to a database, system, or server. In digital contexts, queries are typically used to retrieve specific data or content.
- **Revenue share:** Percentage of total revenue that is attributed to a specific brand, product, service, or partner within a defined market, category or business agreement. It measures how much of the overall revenue is captured by one participant relative to others in the same space.
- **Ad investment share:** Percentage of total advertising spend within a specific category, market, or platform that is attributed to a particular brand, product, or campaign. It indicates how much of the total available ad budget in each competitive set is captured by one advertiser.

Glossary



KPIs

- **Impressions share:** Percentage of total available impressions (or views) that an ad receives compared to the total number of impressions it was eligible to receive within a specific campaign or a time frame. It measures how often an ad is shown relative to its potential reach.
- **Queries share:** Percentage of total search queries (or search volume) in which a specific ad or brands appears, relative to the total number of queries it could potentially be shown for. It measures how often a brand's ad is triggered by relevant terms within a given set of keywords.
- **Market share:** Percentage of product's sales relative to the total sales within its sector or category over a defined period. It is used as a competitiveness metric to assess an organization's relative position within its reference market.
- **Online share:** Percentage of sales generated through physical or traditional channels relative to the total sales of a category, market, or company. This indicator quantifies the weight of physical distribution compared to digital channels.
- **Offline share:** Percentage of sales generated through physical or traditional channels relative to the total sales of a category, market, or company. This indicator quantifies the weight of physical distribution compared to digital channels.
- **Weekly revenue online:** Total amount of money generated from sales or transactions during a specific week. This includes revenue from e-commerce websites, online platforms, or digital services within that seven-day period.
- **CAGR (Compound Annual Growth Rate):** Financial indicator that expresses the constant growth rate of a variable over a specific period, assuming that earnings are reinvested at the end of each year.

06

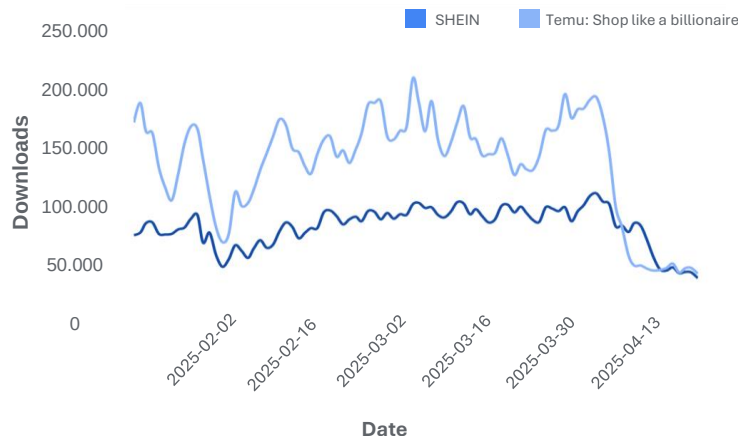
Appendix

June 2025

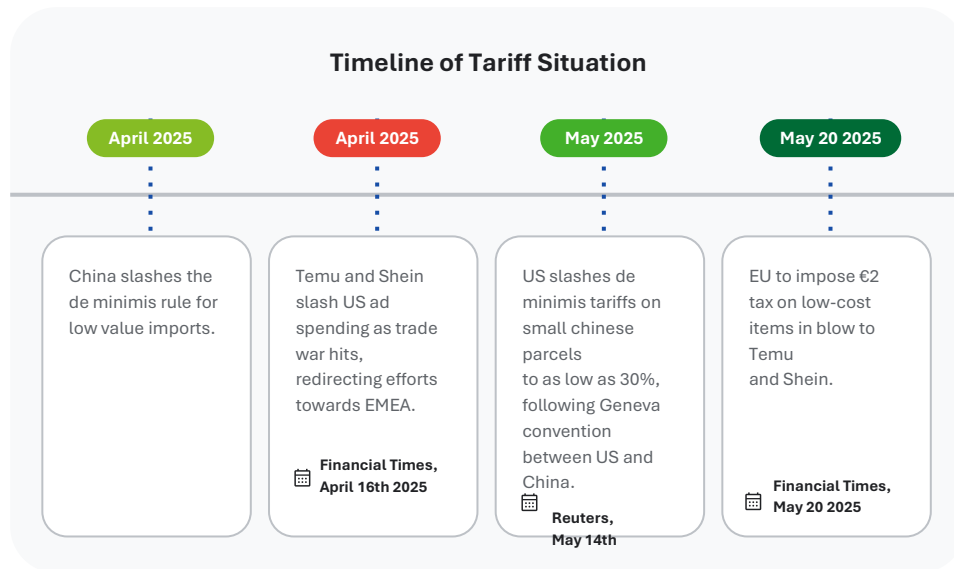
Europe's evolving fast fashion landscape can “tariff-proof” you and act as a hedge against the US market

Daily Downloads: Temu & Shein

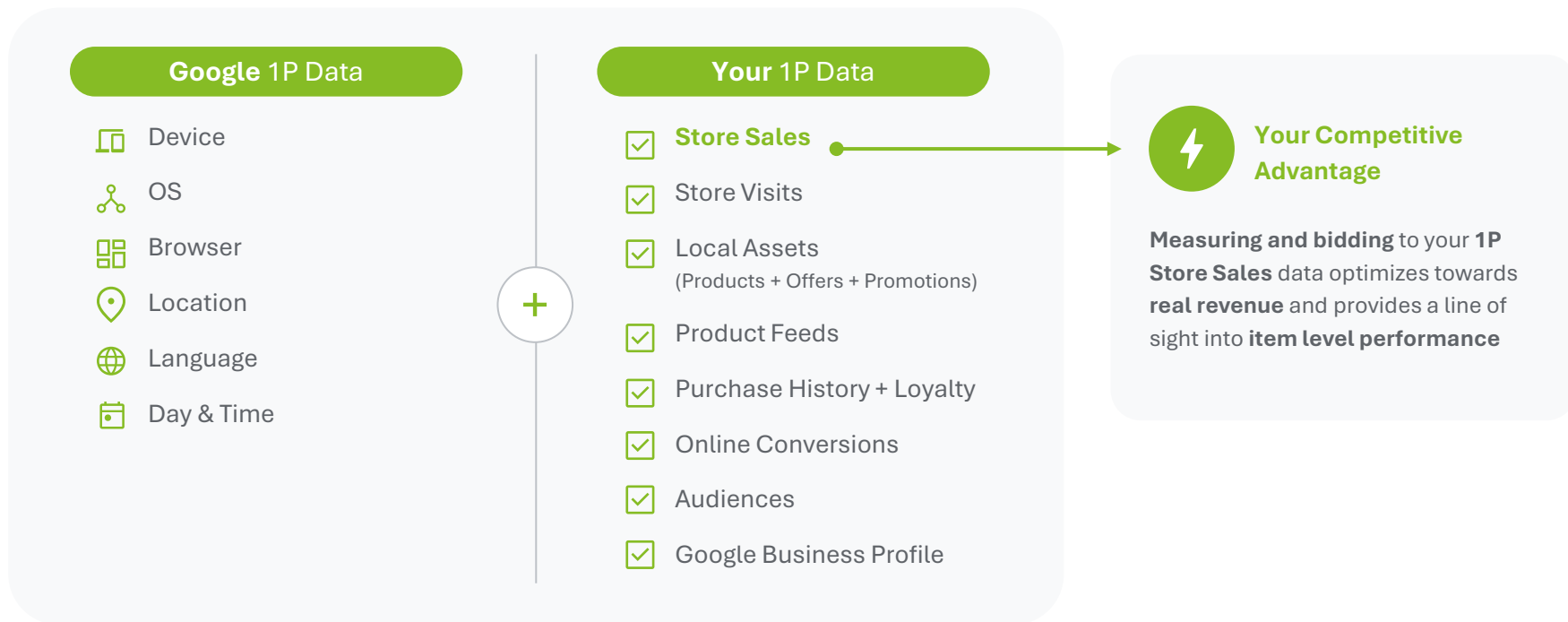
App downloads for top fast fashion players have fallen, with ad-spend and logistics re-routed to Europe



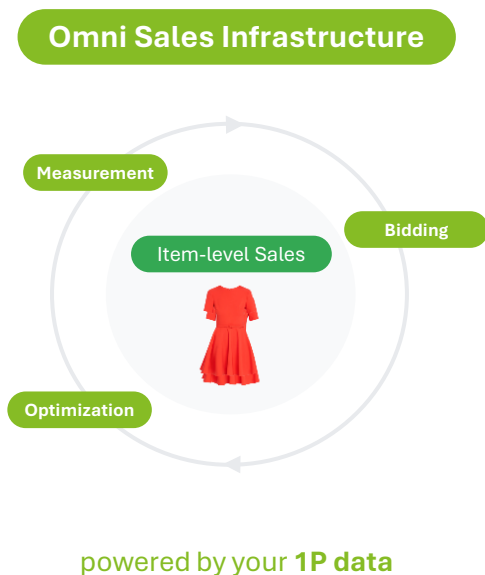
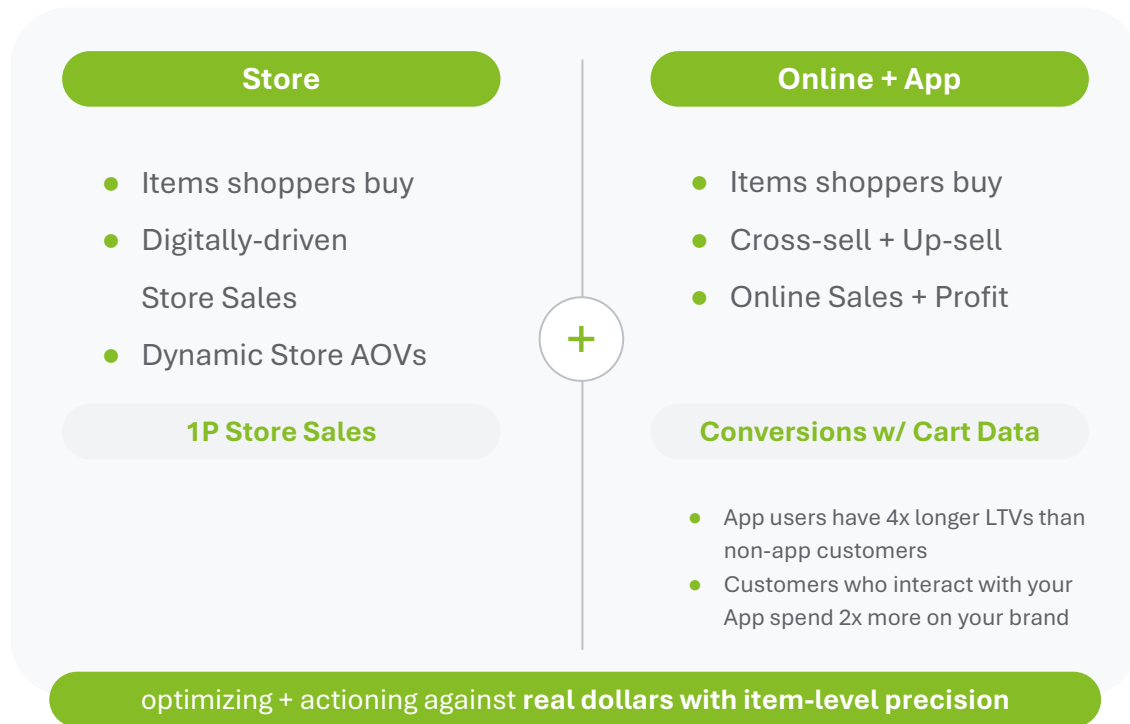
Timeline of Tariff Situation



Leveraging 1PD is key to gain competitive advantages in the omnichannel environment



Infrastructures must revolve around measurement, bidding, and optimization leveraging high-value app engagements



The Store Reimagined: With fashion still being highly sensory and emotional, the store will have to become more than a mere P.O.S



PMAX for Store Goals

A range of signals are used to reach the right audience



Unified Data & Operations for a 360° View

- 360° Customer View (Online + Offline)
- Synced Operations (Real-time Inventory)
- Phygital Marketing (e.g., PMAx for store goals links online to in-store)

Activating hyper personalization: Leveraging Google's AI & data capabilities



Product & Headline



Demand Gen

Discover & Engage with Precision.



Customer Match

Deepen relationship with known customers.



Google Analytics 4

Understand & predict for proactive marketing.



Action

Leverage AI-powered audience discovery (fashion interests, active searches for high-growth clothing categories)

Upload consented first-party data (purchase history, loyalty data, preferences).

Utilize predictive audiences (e.g: likely to purchase, likely to churn) and deep integration with Google Ads.



Impact

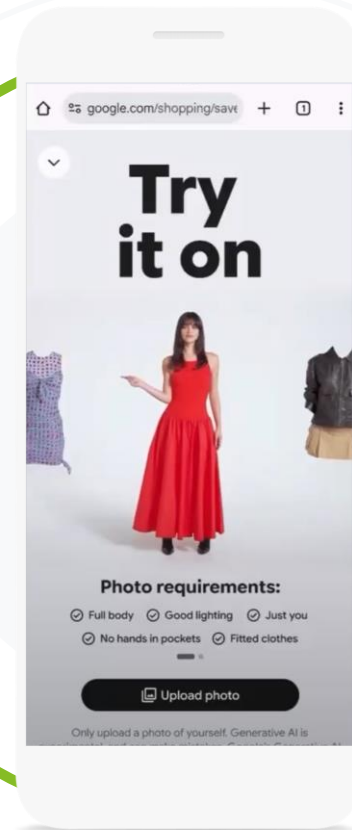
Connect with new, relevant consumers at scale with tailored messaging.

Delivery relevant offers & content based on precise data, boosting loyalty & LTV.

Optimize marketing spend and proactively engage users with the right message at the right time.

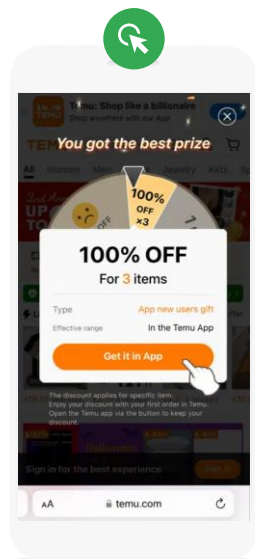


Reaching customers of the future means taking convenience to the next level-like making your shopping advert show the buyer **“Try it on”** before they even buy it

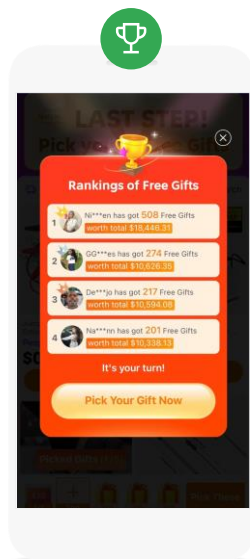




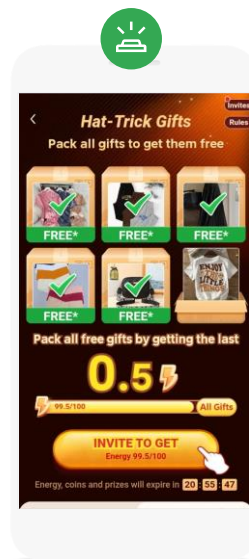
Gamification: The Ultimate Retailtainment Driving Incremental AOV and Repeat Transactions.



Spin, Challenge, Thrill:
Elevating the Shopping
Experience with Gamification



Foster Daily Engagement:
Progress and Achievements
Build Rewarding Routines



Boost Conversions:
Activating Consumers with
Scarce, Temporary Value

“

“TEMU is as addictive as sugar. The experience and cheap prices give consumers a little dopamine hit and keeps them coming back for more”

Neil Saunders, Retail Analyst
BBC Article, *“How the ecommerce retailer drives a shoppy frenzy”*. April 24’

Deloitte.

Google

Thank you!



June 2025

RETAIL EXECUTIVE CIRCLE