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Going Dotti for Zara: Australia's fashion retail scene offers the best of both worlds

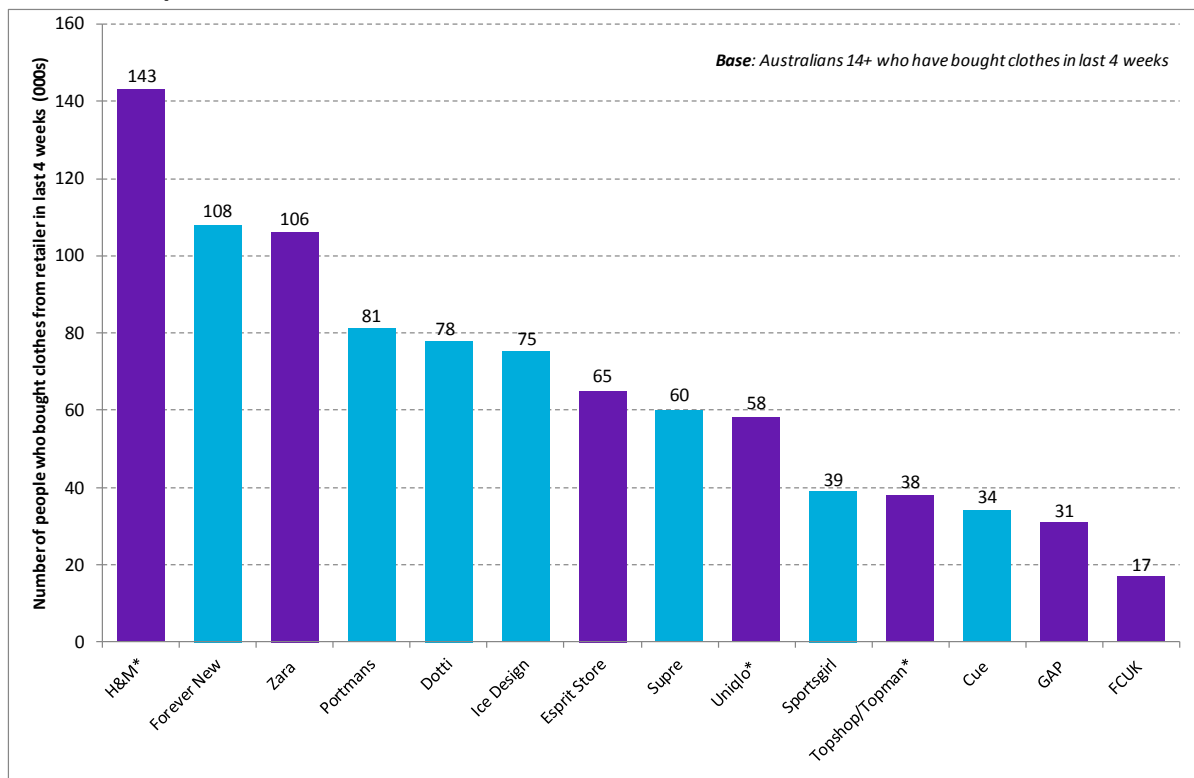
Ask any fashionista: clothing retail in Australia has become a veritable United Nations of style. Just over a year ago, the cool crowd was blissing out over the arrival of Swedish mega-chain H&M and cult Japanese store Uniqlo to our shores; before that, it was the UK's Topshop and Spanish giant Zara. Now the dust has settled, Roy Morgan Research reveals how these stores (and other international retailers) have slotted in amid comparable Australian fashion chains.

According to the latest findings from Roy Morgan Research, just over 10.5 million Australians buy at least one item of clothing in an average four-week period, from a wide range of retailers spanning specialist fashion boutiques, department stores, sportswear shops, discount outlets, and dedicated online retailers.

Among the trendier boutiques (a subset of the 66 fashion boutiques surveyed), H&M is the clear leader, with 143,000 Australians 14+ buying something there in any given four weeks. It's a close contest for second and third places, with Australian boutique Forever New (108,000) edging out Zara (106,000).

FOR IMMEDIATE RELEASE

The fashion pack: customers at some of Australia's trendiest retail chains



Source: Roy Morgan Single Source (Australia), April 2014 – March 2015, except stores marked *, from July 2014 (n=8,127). **NB:** these are just a selection of the many clothing retailers Roy Morgan Research monitors

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US-founded fashion chain Esprit has had an Australian presence for decades, and attracts 65,000 shoppers in an average four weeks; but relative newcomer Uniqlo is fast catching up with 58,000.

Whose customers spend what?

Of course, the number of customers purchasing clothes is one thing, and how much they're spending is another.

Cue customers spend a mean of \$165, making them the highest spenders by far of the stores measured above, well ahead of GAP and Zara shoppers (\$93 respectively), and Forever New shoppers (\$88).

Customers of H&M spend \$51 on average, while the mean spend of Uniqlo shopper is a modest \$40. Spending just \$26 on average, Supre customers are clearly adept at the art of cheap'n' cheerful fashion.

Andrew Price, General Manager – Consumer Products, Roy Morgan Research, says:

“While some industry players were concerned that the recent international entries to the Australian market would threaten home-grown businesses, this doesn't seem to have happened.

“Even with its high volume of customers, H&M currently accounts for just over 1% of total clothing shoppers and 0.6% of market dollar value (the same value as glam Aussie chain Forever New). With its customers spending slightly more on average, Zara has a fractionally higher share (0.7%) of the clothing market.

“Australian retailers keen to thrive in this increasingly crowded, globalised market need to be very clear about how their customers approach fashion shopping. For example, people who buy clothes at Sportsgirl and Dotti are far more likely than the average Aussie clothes shopper to agree with the statement, “I was born to shop” – with H&M being the only international whose customers come close in this respect.

“As all four chains are fairly recent arrivals on the national scene, their interest value is obviously still much stronger than their more familiar local counterparts. So it's no surprise that Topshop, Uniqlo, H&M and Zara customers are all dramatically more likely than those of other boutiques to agree that “I wear clothes that will get me noticed”. Will this change with time? Watch this space...”

For comments or more information about Roy Morgan Research's retail data, please contact:

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Related research findings

View our range of [clothing store customer profiles](#), including [Zara customers](#) and [Sportsgirl customers](#).

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Compiled with data from Roy Morgan's Single Source survey (the largest of its kind in the world, with 50,000 respondents p.a), these ready-made profiles provide a broad understanding of the target audience, in terms of demographics, attitudes, activities and media usage in Australia.

About Roy Morgan Research

Roy Morgan Research is the largest independent Australian research company, with offices in each state of Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research has over 70 years' experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
7,500	±1.1	±1.0	±0.7	±0.5
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2