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**IAB Mobile Marketing Center of Excellence**

# **Fashion on Phones:**

Mobile Readiness of the  
Women's Wear Daily Top 100 Brands

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## Fashion on Phones

# Summary

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- In July 2014 the IAB examined the mobile presences of the WWD top 100 fashion brands to see how well they served their customers on smartphones.
- As of July 2014, only 80% of the WWD 100 fashion brands had a mobile-optimized website. As of Sept. 4, 2014, 83% did. However, 100% of them *should* have one.
- Victoria's Secret, Pink, Tiffany, and The North Face are the four fashion brands doing the maximum amount to serve mobile web customers.
- Brands with a direct retail presence have the strongest imperative to offer great mobile experiences—doing mobile right drives sales on smartphones and in stores.
- 37% of fashion brands use responsive web design (RWD) to facilitate good web experiences across screens.
- 47% of fashion brands have iPhone app, and slightly fewer have Android apps. Only 26% have iPad apps.

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**Fashion on Phones**

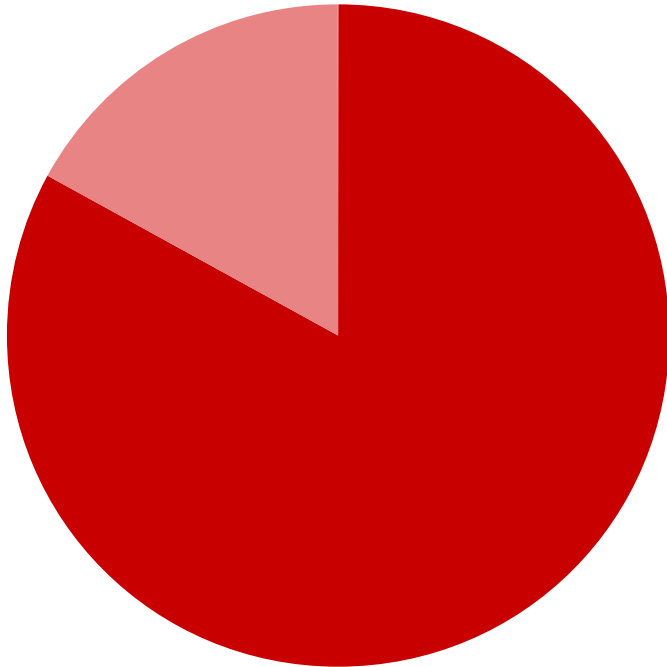
# **Mobile Websites & M-scores**

## Fashion on Phones

# 83% Have a Mobile Web Site

**First, IAB examiners assessed whether the brand had a smartphone-optimized site at all.**

IAB defines “smartphone optimized” as a site designed to fit well and function correctly on smartphone-sized screens without the site visitor needing to zoom or pinch or change orientations.



**As of Sept. 4, 2014,  
83% of the brands in  
the WWD 100 sample  
had mobile-optimized  
sites.**

# The Mobile Site-Less

### WWD 100 Brands Without Mobile-Optimized Sites

- As of Sept. 4, 2014, almost one in five of the brands lacked a mobile-optimized site, making them late to the mobile game.
- The list includes apparel, technology, and high fashion brands.

American Apparel

Bali

Candie's

Casio

Cherokee

Danskin

DKNY

Fruit of the Loom

Joe Boxer

Maidenform

Playtex

Reebok

Seiko






Timex

Vanity Fair

Versace

# Key Mobile Site Features

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-  **85% of brands had a store locator**
-  **65% offered mobile-optimized search results**
-  **64% made tap-to-call phone numbers readily available**
-  **59% of brands with mobile sites had a link to their desktop site**
-  **24% of brands with apps had an app store link on their mobile site**

# What's Your M-score?

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- **A strong mobile web presence is a vital part of any company's digital strategy.**
- **To quantify and compare mobile web offerings, IAB calculated an "M-score" for each of the brands.**
- **M-scores are a weighted index based on having:**
  - A mobile website: 2 points
  - Mobile-optimized search; tap-to-call; store locator; link to app store; link to desktop site: 1 point each
- **M-scores range from 0 to 100, and averaged 61.85.**
- **Not every brand should aim for an M-score of 100.**
- **But no brand should score 0 on this index**

# Mobile Web Presence: Top & Bottom

Four brands had mobile sites scored a perfect M-score (“Mobile Leaders”; M-score=100). Three had no mobile site and no mobile-friendly features at all (“Mobile Laggards”; M-score=0).

## Mobile Leaders



TIFFANY & CO.

**PINK**  
VICTORIA'S SECRET

  
VICTORIA'S  
SECRET

North Face; Pink; Tiffany;  
Victoria's Secret

## Mobile Laggards

*Candie's*

**CASIO.**

**JOE BOXER**

Candie's; Casio; Joe Boxer

All stats are based on the July 2014 audit, with Sept. 2014 review.

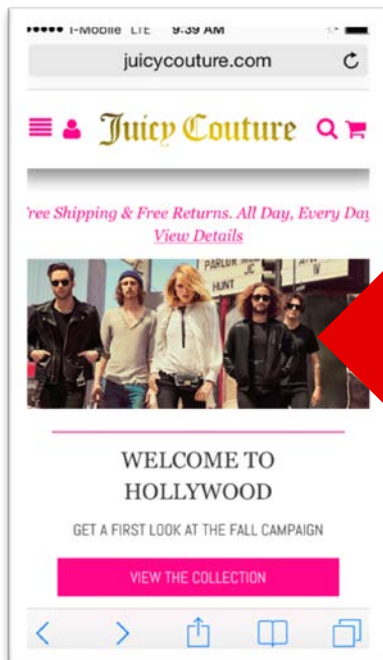
Source: IAB Mobile Fashion Audit, July-August 2014



## Fashion on Phones

# Best Practice: Offer Optimized Search

- Not all brands with optimized sites had mobile-optimized search results.
- Some brands' sites (luxury brands in particular) don't offer search at all.
- Brands that only make their front pages mobile-friendly, not their search results, risk losing sales due to cumbersome site navigation.



Example:  
**Juicy Couture**  
(M-score 42.86):

Mobile-optimized  
front page, but  
search results are  
hard to view on a  
smartphone

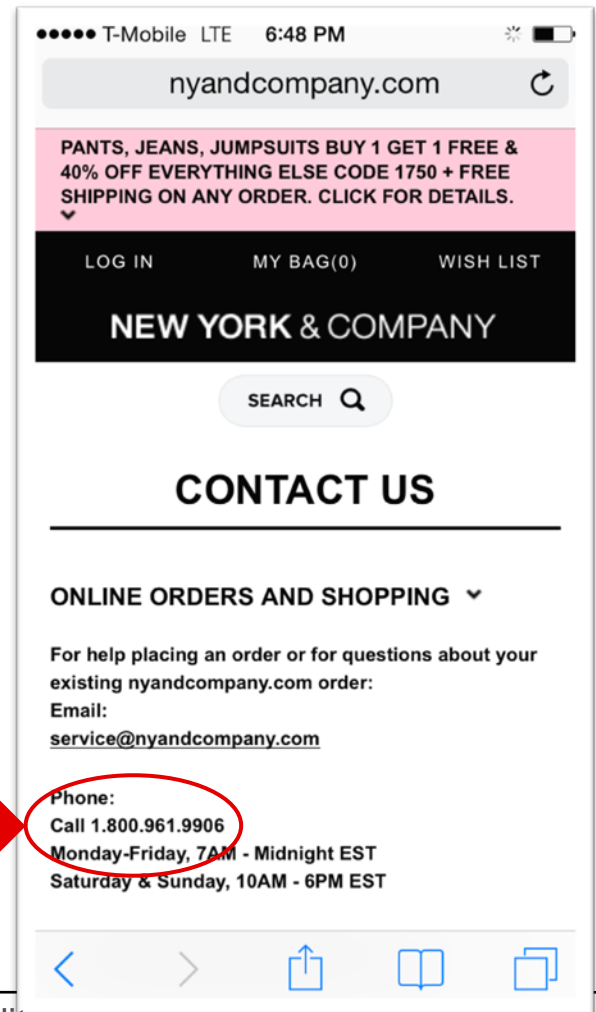


## Fashion on Phones

# Best Practice: Tappable Phone Numbers

- 64% of brands in our survey made tap-to-call phone numbers available within 2 taps of their front page.
- Smartphones will automatically make numbers they recognize as phone numbers tappable.
- Web designers should always test that phone numbers are tappable.
- Finding a phone number on a smartphone and needing to write it down is painful – and potentially costs sales!

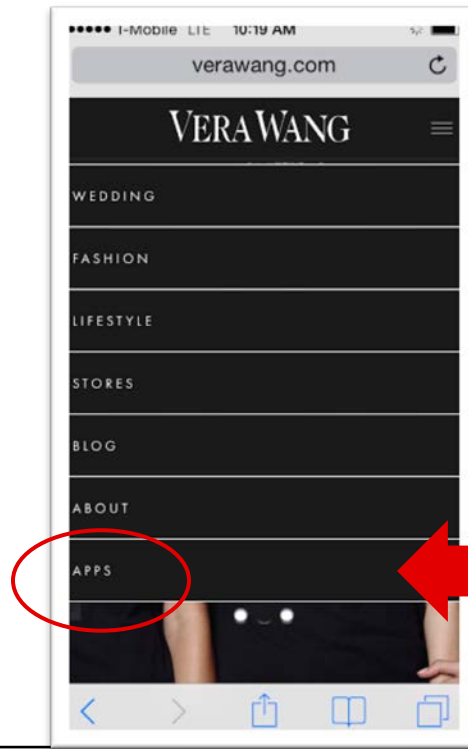
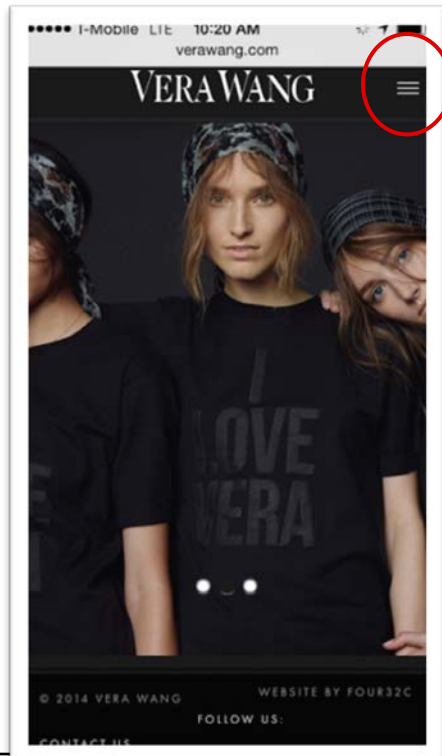
**Example:**  
**New York & Co. (M-score 71.43)**  
**Great mobile site, but non-tappable number**



## Fashion on Phones

# Best Practice: Promote Your Apps

- Only 24% of the brands with apps (see Apps section, below) promoted those apps via their mobile websites.
- This is a significant missed opportunity.



**Example:  
Vera Wang  
(M-score 57.14)**

**Includes info on  
the brand's apps  
via the main  
navigation menu  
on its mobile site**

All stats are based on the July 2014 audit.  
Source: IAB Mobile Fashion Audit, July-August 2014

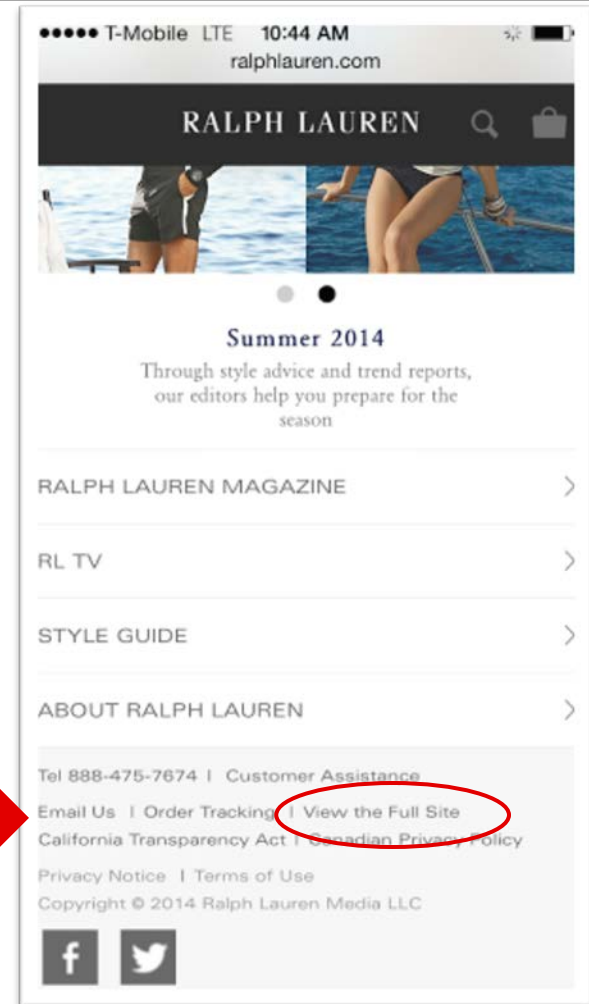
## Fashion on Phones

# Best Practice: Link to Desktop Site

- 59% of brands with mobile sites linked to their desktop version.
- Why do this? Some features exist only on the desktop version, and some consumers simply prefer the full version of the site.
- This best practice may not apply to brands that use responsive design (see next section), where a single site is reformatted for different screens.

Example:  
**Ralph Lauren**  
(M-score 85.71)

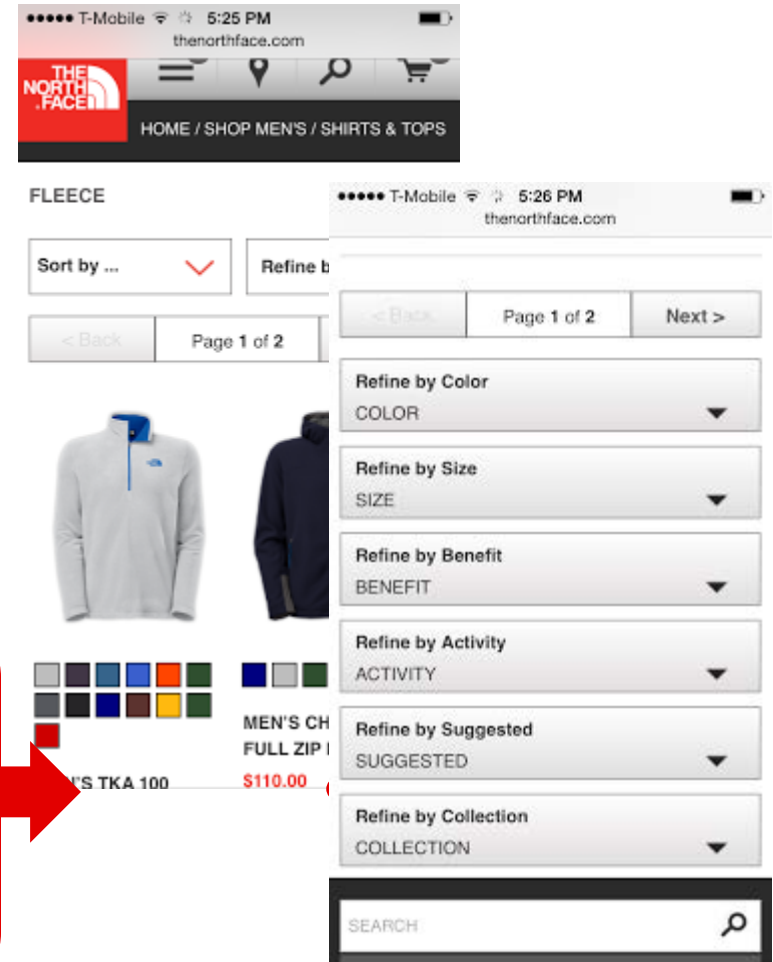
A clear path to the desktop version



## Fashion on Phones

# Best Practices Facilitate Shopping

- Store locators are a no-brainer, critical to helping customers find you in the real world.
- Tappable phone numbers are also key to making a sale, enabling customers place orders or check availability.
- Mobile-optimized search results are critical to driving m-commerce, on-device purchases.



**Example:**  
**The North Face**  
**(M-score 100)**  
**Shopping on their well-designed**  
**mobile site might even be easier**  
**than shopping their PC site**

All stats are based on the July 2014 audit.  
Source: IAB Mobile Fashion Audit, July-August 2014

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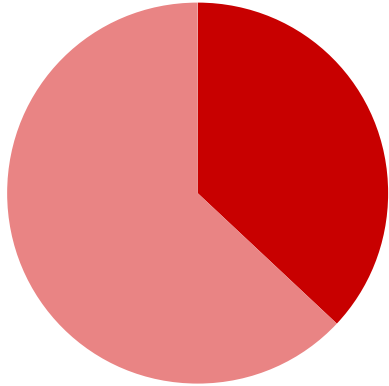
**Fashion on Phones**

# **Responsive Design**

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# Responsive Web Design Remains Fairly Uncommon

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**37% of the brands we examined used responsive design for their tablet and/or smartphone sites.**

- **What is Responsive Web Design (RWD)?**

Technologies that automatically change a web page's layout, graphics, and other features based on the browser or device requesting the page.

- **RWD can help companies deliver tailored content/experiences that fit well across a variety of screen sizes.**
- **Some brands use RWD to fine-tune their PC websites to look good on tablets, but deploy a custom-built smartphone site.**
- **Other brands use RWD across all screens.**

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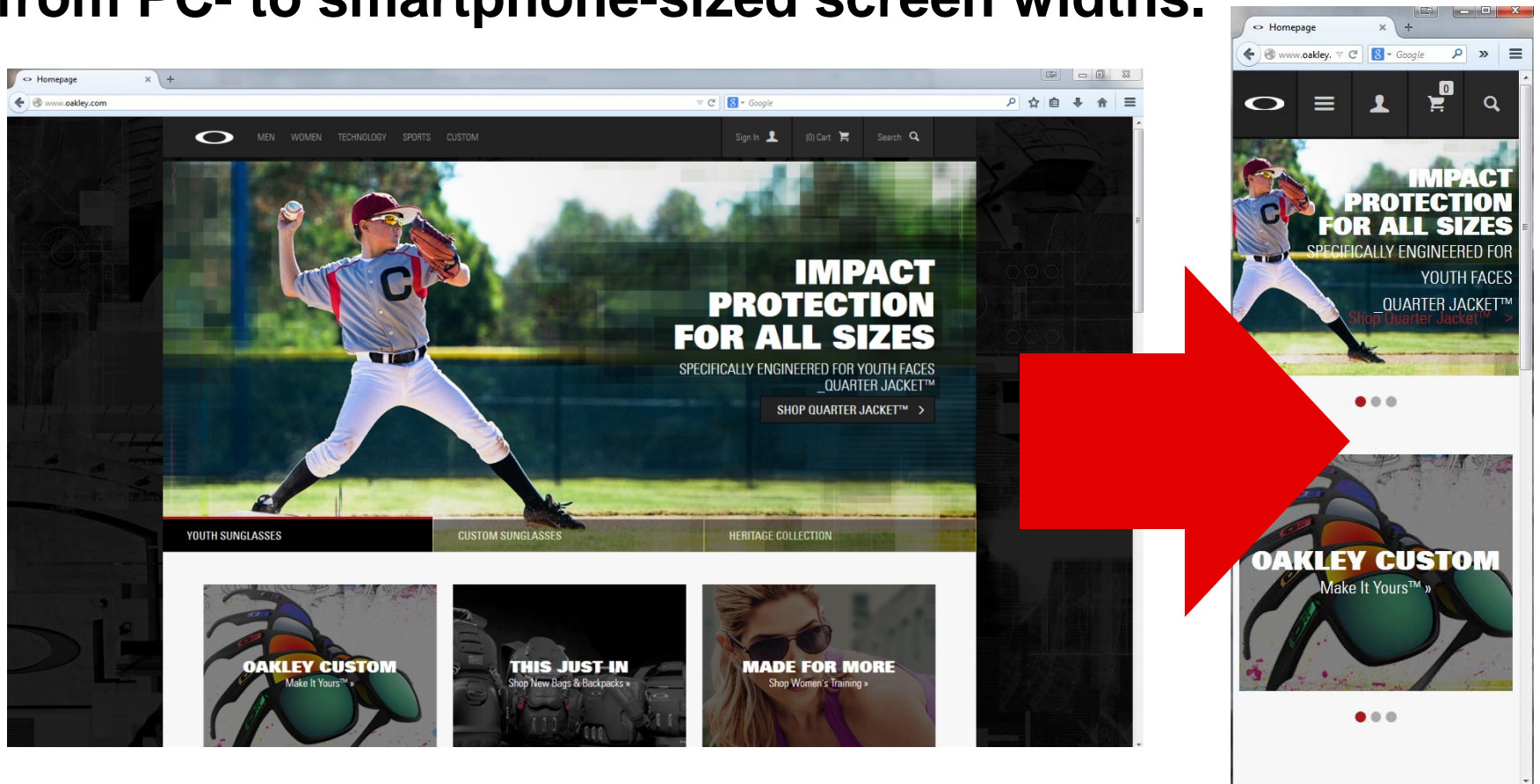
All stats are based on the July 2014 audit.  
Source: IAB Mobile Fashion Audit, July-August 2014



## Fashion on Phones

# Responsive Web Design Example

Oakley's (M-score 42.86) website scales seamlessly from PC- to smartphone-sized screen widths.





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# **Fashion on Phones**

# **Mobile Apps**

# Fashion Apps: Approach

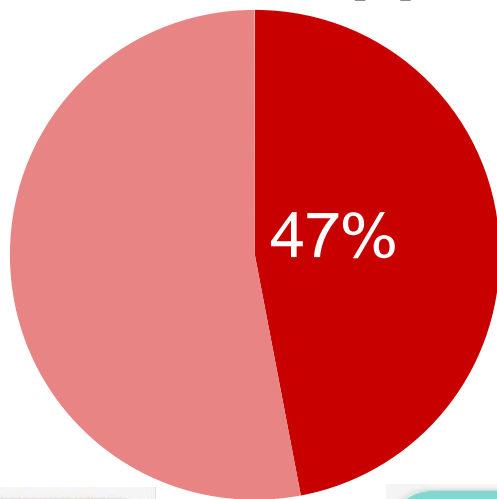
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- **IAB searched the Apple App Store and Google Play to identify fashion brands with mobile apps.**
- **Included apps that met these criteria:**
  - Legitimately created or authorized by the brand
  - English language
  - Aimed at the US market
- **Examples:**
  - **Excluded** Samsonite (M-score 85.71), which has apps in Korean, and Timex (M-score 28.57) with a Spanish-language app in Colombia.
  - **Included** Ann Taylor (M-score 28.57), which does not have a clothing- or shopping-related app, but has one for employment.

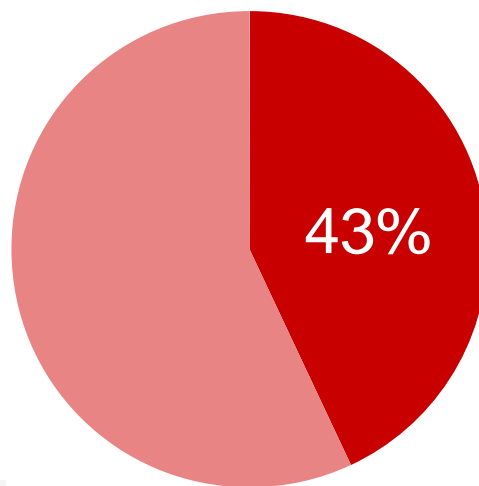
# Almost Half of the Brands Offer an iPhone App

Percentage of brands in the sample that had each of the following types of apps available:

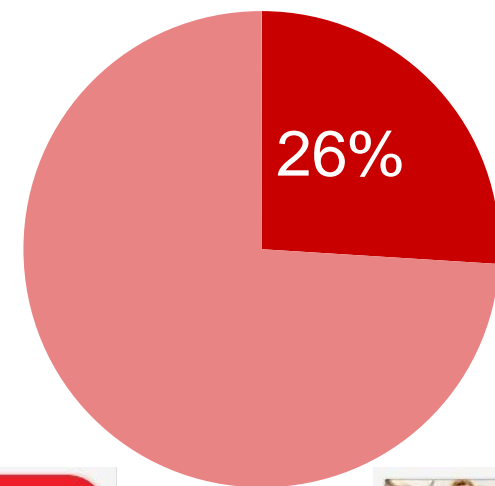
## iPhone App



## Android App



## iPad App



# Fashion Brand App Offerings: Analysis

- **Android apps only lag iPhone apps by a few percentage points**
  - Reflects the growing size and importance of the Android installed base.
- **iPad apps lag iPhone apps (and Android apps) significantly.**
  - Surprising because iPads seem like natural fashion accessories.
  - But iPhone and Android phone audiences are much larger.
  - iPhone apps can work on iPads (stretched to fill the bigger screen).
- **Only three brands had iPad apps without having an iPhone app**
  - Vera Bradley—M-score 85.71
  - Wrangler M-score 71.43
  - Rolex M-score 42.86



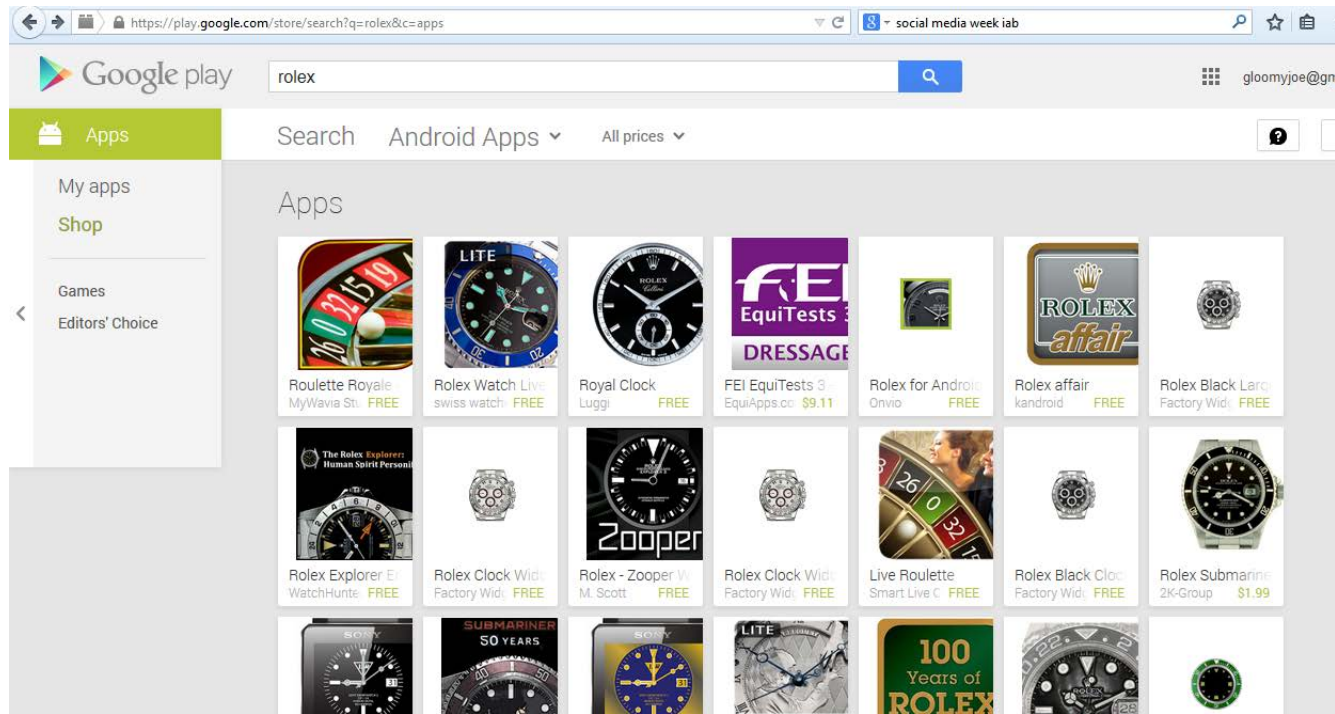
All stats are based on the July 2014 audit.

Source: IAB Mobile Fashion Audit, July-August 2014

## Fashion on Phones

# Brands Must be App-Vigilant

- Google Play search results for “Rolex” look like Canal Street in New York...



...Fakes Abound.

All stats are based on the July 2014 audit.  
Source: IAB Mobile Fashion Audit, July-August 2014

# **Mobile Apps Conclusions**

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**Successful apps can drive deep, recurring, highly engaging relationships with customers, fans, and frequent shoppers.**

**However, by no means does every brand need mobile apps.**

**Before investing in an app, brands should consider:**

- **Their audience**
- **Utility or other value they can deliver in an app**
- **Lifecycle or life expectancy for the app**
- **Platform or platforms they will support**
- **Marketing strategy for the app**

**Brands should monitor app marketplaces to protect their trademarks from infringement**

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## Fashion on Phones

# About the IAB

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The Interactive Advertising Bureau (IAB) is comprised of more than 600 leading media and technology companies that are responsible for selling 86 percent of online advertising in the United States. The IAB empowers the media and marketing industries to thrive in the digital economy. The organization educates marketers, agencies, media companies and the wider business community about the value of interactive advertising. Working with its member companies, the IAB evaluates and recommends standards and practices and fields critical research on interactive advertising. Founded in 1996, the IAB is headquartered in New York City. [www.iab.net](http://www.iab.net)

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# Fashion on Phones

# Methodology

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IAB started with the Women's Wear Daily top 100 brands as listed in their report from December 13, 2012. The WWD 100 is an authoritative list of the most well-known brands in the fashion world, based on a survey that WWD commissions.

Details from the WWD study methodology:

This year, WWD commissioned its exclusive survey with Penn Schoen Berland, a Washington, D.C.–based market research firm. PSB sent an online questionnaire to a nationally representative sample of females, balanced to match U.S. Census data, age 13 to 64, with a minimum household income of \$50,000. The survey contained a total of 1,008 pre-listed brands in nine categories, like sportswear, accessories, outerwear, etc. The respondents were asked to say whether they were “very familiar,” “somewhat familiar” or “not at all familiar” with the brands. The survey yielded 2,311 responses, and was fielded from Oct. 15 to 19. Results are projectable with a margin of error of plus-or-minus 1.91 percent. The overall top 100 ranking is a measure of the percentage saying they were “very familiar” with the labels.

The WWD list included two ties, so comprised a total of 102 brands.

The IAB excluded brands that had either been discontinued or become exclusively in-house store brands and lost a separate US brand presence on the web. This reduced the sample by 8, leaving a final sample of 94.

For those remaining brands, IAB examined their mobile web presence, looking for the presence or absence of several key features – factoring into the brand’s ultimate “M-score.” Those scores are a weighted index based on having:

- A mobile website: 2 points
- Mobile-optimized search; tap-to-call; store locator; link to app store; link to desktop site: 1 point each

In addition, IAB also searched both the Apple App Store and Google Play, to see whether each brand had branded applications available for download. Separately, use of responsive design was investigated as well.

For mobile web, each brand was examined by two reviewers. Where both reviewers found the same result, that was accepted. Where the two reviewers disagreed, a third person conducted a “tiebreaking” review.

IAB’s reviewers used Android and iOS smartphones, and conducted their survey from July 14-31, 2014, with an additional review of mobile-optimized sites—the most important mobile-friendly criteria – conducted on Sept. 4, 2014.

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