

Clothing Retailing: Inc Impact of COVID-19 - UK - October 2020

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- The impact of COVID-19 and the second national lockdown on the clothing market.
- How consumers' clothes shopping behaviours and attitudes have changed since COVID-19.
- Where people have bought clothes in the last 12 months in-store and online.
- How consumers have reacted to the reopening of fashion stores following the lockdown.

Appetite for clothing has declined dramatically since the COVID-19 outbreak and fashion has been one of the hardest hit of all retail sectors. During the lockdown, with people working and spending most of their time at home, there was little need for people to update their wardrobes and demand was limited to mainly loungewear, sportswear and casual clothing.

The virus has forced many consumers to reprioritise spending and buying new fashion items has moved down the list of priorities and led people to focus on necessities. Indeed, 34% of clothes shoppers are wearing older items in their wardrobe since the start of COVID-19.

Younger generations are the most likely to have cut back on buying clothes in the last 12 months due to concerns about money. Financial instability created by furloughing schemes and widespread redundancies across different industries have hit young people hardest. Young consumers aged 16-34 have typically been the main clothes buyers, updating their wardrobes frequently due to changing fashion trends. However, around a third of Younger Millennials have become less interested in fashion trends since the start of the COVID-19 pandemic.

A second national lockdown from 5 November 2020 will test the main learnings of the first lockdown, which highlighted the importance for all retailers to invest



“Appetite for clothing has dropped dramatically since the first lockdown and will be dealt a further blow with the second national lockdown during peak trading season, making it one of the hardest-hit retail sectors in 2020.”

– **Tamara Sender Ceron,**
Senior Fashion Analyst

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Clothing Retailing: Inc Impact of COVID-19 - UK - October 2020

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

in their online operations and to truly focus on connecting online and offline in order to create a seamless experience for the customer, giving them more flexibility in how they shop.

As consumers shop more online for fashion, combined with the ongoing closure of fitting rooms even when stores reopened, has accentuated the need for retailers to invest more heavily in more accurate online digital fit technology. This will help reduce the high rate of returns due to sizing issues and to improve the overall online shopping experience.



What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **Key issues covered in this Report**
- **COVID-19: market context**
- **Economic and other assumptions**
- **Products covered in this Report**

EXECUTIVE SUMMARY

- **Impact of COVID-19 on clothing category**
Figure 1: Short, medium and long-term impact of COVID-19 on clothing, 3 November 2020
- **The market**
- **Appetite for clothing declines dramatically**
Figure 2: Consumer spending on clothing and accessories, 2015-25 (prepared on 5 November 2020)*
- **Specialists see deepest declines**
Figure 3: Retail sales through specialist clothing retailers, 2015-25 (prepared on 3 November 2020)
- **Online clothing sales jump in 2020**
Figure 4: Online sales of clothing and accessories, 2015-20
- **Companies and brands**
- **Next remains leading specialist**
Figure 5: Leading specialist retailers: compound annual growth in revenues, 2015-19
- **M&S loses trust, while Next and Primark seen as innovative**
Figure 6: Attitudes towards and usage of selected clothing brands, February-September 2020
- **Adspend revives following lockdown slump**
- **The consumer**
- **People feel uncomfortable trying on clothes in-store**
Figure 7: Changing priorities since COVID-19, 10-17 September 2020
- **Surge in sportswear purchasing**
Figure 8: Outerwear items purchased in the last three months, June 2019-September 2020
- **Consumers more likely to have bought online than in-store**
Figure 9: How consumers have bought clothes for themselves in the last 12 months, August 2020
- **Amazon competes for lead with M&S**
Figure 10: Retailers used to purchase clothing in the last 12 months, net of retailers used to purchase in-store and/or online, August 2020
- **Buying new clothes becomes less of a priority**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Changes in clothes shopping behaviour since COVID-19, August 2020

- **Value for money dominates**

Figure 12: Most important factors when choosing which clothes to buy, August 2020

- **Young prefer to buy from brands that promote diversity**

Figure 13: Clothes shopping behaviour, August 2020

- **Adapting stores in a time of COVID**

Figure 14: Clothes shopping behaviour in-store once clothes stores have reopened following COVID-19 lockdown, August 2020

ISSUES AND INSIGHTS

- **Impact of COVID-19 on the clothing market**
- **Who are the winners and losers in clothing?**
- **Adapting to a new fashion retail reality**

THE MARKET – KEY TAKEAWAYS

- **Dramatic decline in clothing sales in 2020**
- **Gradual recovery**
- **Specialists see deepest declines**
- **Consumer confidence remains volatile**

MARKET SIZE AND FORECAST

- **COVID-19 leads to a drop in appetite for clothing**

Figure 15: Short, medium and long-term impact of COVID-19 on clothing, 3 November 2020

- **Lockdown**
- **Re-emergence**
- **Recovery**

- **Dramatic decline in clothing sales in 2020**

Figure 16: Consumer spending on clothing and accessories, 2015-25 (prepared on 5 November 2020)*

Figure 17: Consumer spending on clothing and accessories, at current prices, 2015-25

- **Continued anxiety impacts footfall**
- **Gradual recovery**
- **Market drivers and assumptions**
- **Learnings from the last recession**

Figure 18: Consumer spending on clothing and accessories, 2008-12

- **Forecast methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

MARKET SEGMENTATION

- Underwear market gains share**

Figure 19: Estimated breakdown of consumer spending on clothing and accessories, 2020

Figure 20: Estimated % breakdown of consumer spending on clothing and accessories, 2018-20

SECTOR SIZE AND FORECAST

- Specialists see deepest declines**

Figure 21: Retail sales through specialist clothing retailers, 2015-25 (prepared on 3 November 2020)

Figure 22: Retail sales through specialist clothing retailers, at current prices, 2015-25

- Polarised recovery**

- Market drivers and assumptions**

- Clothing sales through specialist clothing retailers**

Figure 23: Sales of clothing and accessories through clothing retailers, 2015-20

Source: ONS/Mintel

CHANNELS OF DISTRIBUTION

- COVID-19 increases shifts in where people shop for clothing**

- Specialists hardest-hit sector of COVID-19 pandemic**

- Department stores also underperforming**

- Growing sectors**

Figure 25: Estimated distribution of consumer spending on clothing, by type of retailer, 2019

Figure 26: Estimated distribution of consumer spending on clothing, by type of retailer, 2015-19

MARKET DRIVERS

- Clothing falls into deflation**

Figure 27: Consumer price inflation, 2009-19

- Footwear inflation drops further in September 2020**

Figure 28: Consumer price inflation, August 2019-September 2020

- Real wage growth falling**

Figure 29: Real wages growth: wages growth vs inflation, January 2016-August 2020

- Consumer confidence remains volatile**

Figure 30: Mintel financial confidence tracker, January 2018-August 2020

- Consumers saving more**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 31: Trends in what extra money is spent on, September 2019 and September 2020

- **Rates of obesity high among women**

Figure 32: Overweight and obesity prevalence in UK population, by gender, 2014-18

- **Increase in young will benefit clothing market**

Figure 33: Trends in the age structure of the UK population, 2019-29

- **Consumers spending more time online due to COVID-19**

Figure 34: Online activities done in the last three months on any device, June 2019 and June 2020

ONLINE

- **Online clothing sales grow by 26% in 2020**

Figure 35: Online sales of clothing and accessories, 2015-20

- **Where they shop online**

Figure 36: Retailers used to purchase clothing online in the last 12 months, August 2020

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Next remains leading specialist but Primark surpasses M&S**
- **Online players benefit from shift online**
- **Face masks present new category for retailer**
- **ASOS stands out as the most trusted pureplay**

LEADING SPECIALISTS

- **Next remains leading specialist but Primark surpasses M&S**

Figure 37: Leading specialist retailers: net revenues, 2015-19

- **Clothing specialists show polarised performance over the past five years**

Figure 38: Leading specialist retailers: compound annual growth in revenues, 2015-19

- **COVID-19 forced struggling retailers to close stores**

Figure 39: Leading specialist retailers: Outlet numbers, 2015-19

- **Sales per outlet**

Figure 40: Leading specialist retailers: estimated annual sales per outlet, 2015-19

- **Sales area and sales densities**

Figure 41: Leading specialist retailers: total sales area, 2015-19

Figure 42: Leading specialist retailers: estimated annual sales per square metre, 2015-19

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Operating profit and margins**

Figure 43: Leading specialist retailers: operating profits, 2015-19

Figure 44: Leading specialist retailers: operating margins, 2015-19

LEADING NON-SPECIALISTS

- **Sports retailers**
- **Department stores**
- **Supermarkets are major players**
- **Online retailers**

Figure 45: Leading non-specialists: estimated clothing and footwear revenues, 2015-19

MARKET SHARES

Figure 46: Leading retailers' estimated share of spending on clothing and footwear, 2015-19

- **Change in market shares**

Figure 47: Leading clothing retailers, change in share of clothing spending, 2015-19

LAUNCH ACTIVITY AND INNOVATION

- **Retailers strengthen ecommerce**
- **Hush reveals new ecommerce website with mobile-first design**
- **Mango launches virtual chatbot**
- **Morrisons launches dedicated website for own clothing brand Nutmeg**
- **Retailers help consumers shop safely**
- **Missguided teams up with InPost UK to offer contact-free click-and-collect service**
- **Phase Eight offers in-store personal styling appointments**
- **ASOS accelerates AR clothes fitting service**
- **Diesel unveils digital showroom Hyperoom**

Figure 48: Diesel's digital selling platform and showroom, 2020

- **Sustainability**
- **Timberland's first sustainability concept store**

Figure 49: Timberland's sustainability store on Carnaby Street, 2020

- **Selfridges launches Project Earth**
Figure 50: The Restory at Selfridges, 2020
- **Connolly launches upcycled collection pop-up at Portobello Market**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Puma unveils new Dope Dye Technology**
Figure 51: The Puma X CSM collection, 2020
- **Resale and rental fashion**
- **Liberty enters rental market in collaboration with My Wardrobe HQ**
Figure 52: My Wardrobe HQ pop-up at Liberty, 2020
- **Selfridges partners with HURR Collective in first designer fashion rental collection**
- **Oxfam opens second-hand shop in Selfridges for #SecondHandSeptember**
Figure 53: Oxfam pop-up at Selfridges, 2020
- **Pop-ups**
- **Lone Design Club reveals shoppable window**
Figure 54: Lone Design Club shoppable window, 2020
- **Burberry launches digital and in-store 'Animal Kingdom' pop-ups**
Figure 55: Burberry's Animal Kingdom collection, 2020
- **Ted Baker teams up with Creative Mentor Network to celebrate store reopening**
Figure 56: Ted Baker 'Nice To See You, To See You Nice' slogan, 2020
- **Face-covering launches**
- **Burberry to launch luxury face masks costing £90**
Figure 57: Burberry's face masks, 2020
- **Sainsbury's Tu sells face coverings for adults and children**
Figure 58: Sainsbury's Tu family pack of face masks, 2020
- **Christopher Kane launches free face mask craft packs**
Figure 59: Christopher Kane free face masks, 2020
- **Brands launch matching masks for outfits**
Figure 60: Designer Samantha Cameron's matching dress and face mask for brand Cefinn, 2020
- **Retailers repurpose factories as part of COVID-19 relief effort**
- **Mulberry delivers PPE to hospitals**
- **Reiss repurposes supply chain to produce face masks**
- **Mackintosh uses factory in Nelson to produce nurse uniforms**
- **Primark donates to NHS**
- **M&S providing pyjamas for NHS workers**
- **Kurt Geiger donates shoes to NHS staff and first month of store profits from 15 June**
- **Net-A-Porter helps deliver essentials to those in need**
- **Launches and store openings**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Morrisons opens Nutmeg clothing standalone store**
- **Morrisons launches website for Nutmeg**
Figure 61: Morrisons Nutmeg store, 2020
- **Forever 21 enters UK with online store**
- **Missguided launches lockdown-inspired range**
Figure 62: Missguided lockdown-inspired range, 2020

ADVERTISING AND MARKETING ACTIVITY

- **Sector advertising spend down 8.5% year-on-year in 2019**
Figure 63: Total recorded above-the-line advertising expenditure on clothing and accessories, 2015-19
- **Advertising spend back to pre-pandemic level following COVID-19 lockdown slump**
Figure 64: Total recorded above-the-line advertising expenditure on clothing and accessories, by month, January-July 2019 and 2020
- **Shein is the biggest spender despite spending half of what it did in 2018**
Figure 65: Total recorded above-the-line, online, display and direct mail total advertising expenditure on clothing and accessories, by leading spenders, 2015-19
- **Outdoor and TV share of advertising spend increasing as dominant digital begins to decline**
Figure 66: Total recorded above-the-line advertising expenditure percentage on clothing, by media type, total market, 2019
- **2020 campaign highlights**
- **Shein's first out-of-home advertising campaign**
- **Marks & Spencer digitally focused athleisure campaign and first ever denim TV advert**
- **Matalan new brand positioning campaign**
- **Freemans' new website, app and exclusive clothing collection**
- **John Lewis advertises its spring/summer season on TV for the first time ever**

BRAND RESEARCH

- **Brand map**
Figure 67: Attitudes towards and usage of selected brands, February-September 2020
- **Key brand metrics**
Figure 68: Key metrics for selected brands, February-September 2020

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Brand attitudes: ASOS seen as innovative**
Figure 69: Attitudes, by brand, February-September 2020
- **Supermarket clothing brands seen as accessible**
Figure 70: Brand personality – Macro image, February-September 2020
- **JD Sports viewed as stylish and responsive**
Figure 71: Brand personality – Micro image, February-September 2020
- **Brand analysis**
- **M&S loses trust, while Next and Primark seen as innovative**
- **Supermarket clothing brands seen as offering good value**
- **ASOS stands out as the most trusted pureplay**
- **Gap seen as overrated**

THE CONSUMER – KEY TAKEAWAYS

- **People are spending less on fashion**
- **Younger generations favour buying online, but also visit stores**
- **Amazon competes for lead with M&S**
- **New clothes and fashion trends become less of a priority**
- **Value for money dominates**

IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **Over a quarter are worse off since COVID-19...**
Figure 72: Change in financial situation since COVID-19 outbreak, 25 June-7 August 2020
- **...with women most concerned**
Figure 73: Fears around the negative impact COVID-19 will have on people’s lives, by gender, 18-24 June 2020
- **People are spending less on fashion...**
Figure 74: Consumer spending habits since COVID-19, 10-17 September 2020
- **...but there has been a notable increase in online purchases**
Figure 75: People shopping more online since COVID-19, 16 April-17 September 2020
- **People feel uncomfortable trying on clothes in-store**
Figure 76: Changing priorities since COVID-19, 10-17 September 2020
- **Growing usage of face masks**
Figure 77: Face masks and scrunchies, September 2020
Figure 78: Agreement with usage of face masks/coverings in different situations, 10-17 September 2020

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

WHAT THEY BUY

- Appetite for fashion falls**
Figure 79: Fashion items purchased in the last three months, June 2019–September 2020
- Surge in sportswear purchasing**
Figure 80: Outerwear items purchased in the last three months, June 2019–September 2020
- Most consumers only buy one or two items**
Figure 81: Number of clothing items purchased on most recent shopping trip, June 2019–September 2020
- Big decline in consumers spending £75 and over**
Figure 82: Trends in amount spent on clothing, June 2019–September 2020

HOW THEY SHOP

- Consumers more likely to have bought online than in-store**
Figure 83: How consumers have bought clothes for themselves in the last 12 months, August 2020
- Younger generations favour buying online, but also visit stores**
Figure 84: How consumers have bought clothes for themselves in the last 12 months, by generation, August 2020
- Young women continue to shop, while young men cut back**
Figure 85: People who have bought clothes for themselves in-store and/or online or have not bought clothes in the last 12 months, by gender and age, August 2020

WHERE THEY SHOP

- Specialists most popular, but pureplays growing**
Figure 86: Types of retailers used to purchase clothing in the last 12 months, by channel, August 2020
- Amazon competes for lead with M&S**
Figure 87: Retailers used to purchase clothing in the last 12 months, net of retailers used to purchase in-store and/or online, August 2020
- Primark retains popularity despite lack of online site**
Figure 88: Retailers used to purchase clothing in the last 12 months, by channel, August 2020
- People shop at fewer retailers**
Figure 89: Repertoire of retailers used to purchase clothing in the last 12 months, by channel, August 2020

CUSTOMER PROFILES

- Next sees increase in male customer base**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 90: Retailer customer profile, by gender, August 2020

- **ASOS loses youngest shoppers**

Figure 91: Retailer customer profile, by age, August 2020

Figure 92: Retailer customer profile, by socio-economic group, August 2020

CHANGES TO CLOTHES SHOPPING SINCE COVID-19

- **Buying new clothes becomes less of a priority**

Figure 93: Changes in clothes shopping behaviour since COVID-19, August 2020

- **Younger Millennials shun trendy fashion**

Figure 94: Changes in clothes shopping behaviour since COVID-19, by generation, August 2020

- **Baby Boomers worry about visiting stores**

Figure 95: Changes in clothes shopping behaviour since COVID-19, by generation, August 2020

MOST IMPORTANT FACTORS WHEN BUYING CLOTHES

- **Value for money dominates**

Figure 96: Most important factors when choosing which clothes to buy, August 2020

- **Young online shoppers want more inclusive and diverse models**

Figure 97: Most important factors when choosing which clothes to buy, by how people have bought clothes in the last 12 months, August 2020

CLOTHES SHOPPING BEHAVIOUR

- **Younger generations cut back the most...**

Figure 98: Clothes shopping behaviour, August 2020

Figure 99: Agreement with statement 'Concerns about money in the last 12 months have caused me to cut back on buying clothes', by generation, August 2020

- **...but prefer to buy from brands that support causes and promote diversity**

Figure 100: Agreement with statements 'I prefer to buy clothes from brands that support important causes than those that don't' and 'I would be put off buying clothes from a retailer that doesn't promote diversity', by generation, August 2020

- **Young buy clothes to look good online**

- **Parents of under-18s buy more clothes on discount**

Figure 101: Clothing Retailing – CHAID – Tree output, August 2020

- **Methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 102: Clothing retailing – CHAID – Table output, August 2020

CLOTHES SHOPPING IN-STORE AT A TIME OF COVID-19

- **Comfort with in-store shopping depends on age**
Figure 103: Clothes shopping behaviour in-store once clothes stores have reopened following COVID-19 lockdown, August 2020
- **Adapting stores in a time of COVID**
Figure 104: Agreement with statements ‘I have visited a clothing store’, ‘I feel comfortable going shopping for clothes in-store’ and ‘I think social distancing is being done properly in stores’ now that stores have reopened, by age, August 2020
- **Women think it is pointless to visit stores without fitting rooms**

ARCADIA

- **What we think**
- **Arcadia closes more stores and plans restructure post-COVID-19...**
- **...Westfield Stratford is to close after lease expires...**
- **...but Topshop on Oxford Street to remain open after £310 million refinancing**
- **Arcadia furloughs 14,500 staff and execs face 50% pay cuts**
- **Snapchat teams up with adidas and Topshop in new ecommerce initiative**
- **Company background**
- **Company performance**

Figure 105: Arcadia Group: Group financial performance, 2014/15-2018/2019

Figure 106: Arcadia: Outlet data, 2014/15-2018/19

- **Retail offering**

GRUPO INDITEX

- **What we think**
- **A global business**
- **Upsizing stores**
- **Online a big opportunity for growth**
- **Technology at the heart of the business**
- **Flexible and responsive approach to production helped it cope with COVID**
- **Sustainability is key to future**
- **Where now?**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Company background**
- **Company performance**

Figure 107: Grupo Inditex: Group financial performance, 2015/16-2019/20

Figure 108: Grupo Inditex: Sales by brand, 2019/20

Figure 109: Grupo Inditex: Outlet data, 2015/16-2019/20

Figure 110: Grupo Inditex: Outlet numbers by brand, 2019/20

- **Retail offering**

H&M HENNES & MAURITZ

- **What we think**
- **New hyper-local store concept**
- **Custom-made perfect fit jeans**
- **Online expansion giving more customers more options to access its brands**
- **Livestreaming shopping events**
- **Fashion rental and re-sale point towards an increased focus on sustainability**
- **Company background**
- **Company performance**

Figure 111: H&M Hennes & Mauritz: Group financial performance, 2014/15-2018/19

Figure 112: H&M Hennes & Mauritz: Outlet data, 2014/15-2018/19

- **Retail offering**

MARKS & SPENCER

- **What we think**
- **Clothing delivered with groceries**
- **Drive-through fashion service**
- **Online instalment payment option to help spread the cost of buying fashion**
- **Wider choice of brands to broaden customer appeal**
- **Shifting focus away from formalwear range to contemporary everyday fashions**
- **Eradicates alpaca wool from products**
- **Company background**
- **Company performance**

Figure 113: Marks & Spencer: Group financial performance, 2015/16-2019/20

Figure 114: Marks & Spencer: Outlet data, 2015/16-2019/20

- **Retail offering**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

NEXT GROUP

- **What we think**
- **Location of stores has been key**
- **Greater shift towards online**
- **Product mix benefited from bias to sports and loungewear**
- **Growing focus on beauty**
- **Next ups its ante on underwear**
- **Where next**
- **Company background**
- **Company performance**

Figure 115: Next Group: Group financial performance, 2014/15-2019/20

Figure 116: Next Group: Outlet data, 2014/15-2019/20

- **Retail offering**

PRIMARK/PENNEYS

- **What we think**
- **Missing out on online sales costs the brand millions in lost revenue**
- **A must-visit destination for consumers shopping for clothes in-store**
- **Cut-price fashion**
- **New eco-conscious fashion, homeware and beauty collection**
- **First ever sportswear collaboration**
- **Company background**
- **Company performance**

Figure 117: Primark/Penneys: Group financial performance, 2015/16-2019/20

Figure 118: Primark/Penneys: Outlet data, 2015/16-2019/20

- **Retail offering**

RIVER ISLAND

- **What we think**
- **'Buy now, pay later' online option**
- **Needs to do more to get customers back through the door**
- **Commits to being more transparent**
- **Exclusive childrenswear collaboration with TV star and personality Samantha Faiers**
- **Own-brand beauty offering**
- **Company background**
- **Company performance**

Figure 119: River Island Holdings Limited: Group financial performance, 2015-19

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 120: River Island Holdings Limited: Outlet data, 2015-19

- **Retail offering**

TK MAXX UK

- **What we think**
- **A mountain of unsold stock to choose from**
- **Knockdown prices**
- **Giving clothes a second chance**
- **Company background**
- **Company performance**

Figure 121: TK Maxx UK: Group sales performance, 2015/16-2019/20

Figure 122: TK Maxx UK: Outlet data, 2015/16-2019/20

- **Retail offering**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

APPENDIX – MARKET/SECTOR SIZE AND FORECAST

- **Forecast methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.