

Clothing Retailing - Europe - October 2017

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“Clothing retailing is changing. Consumers are becoming more demanding and too many well established retailers have failed to respond adequately. New dynamic retailers are developing to take their place – some online only, but others combining online and stores.”

– Richard Perks, Director of Retail Research

This report looks at the following areas:

We cover the top five economies in detail in the individual country chapters of this report Clothing Retailing – Europe and in the Executive Summary – Europe – The Market chapter we also provide data on another 25 European economies. More details of retailing in these smaller markets plus Russia and Turkey can be found in Mintel’s European Retail Handbook, September 2017. Single country reports on Clothing Retailing are also available for the UK, France, Germany, Spain and Italy.

Clothing specialists are the focus of our report, because they are still the dominant channel in the market. That is changing. The specialists are losing share in the market, sometimes to non-specialists (such as the supermarkets in the UK) and sometimes to online retailers. It is our normal practice to follow the classifications used by the national statistics offices, but in clothing that needs to be widened. Online retailers, such as Zalando, are treated as “non-store retailers” in the national statistics, whereas we feel that they are actually clothing specialists and the distinction between them and store-based retailers is to a considerable extent artificial. We have also included Amazon, which although a “non-specialist”, is actually a major online player in clothing as well. In this report we have tried, where possible, to reflect the actual competitive situation.

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

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Table of Contents

Europe – Overview

- Introduction
- Country and company coverage
- Consumer research coverage
- Definitions
- Retail sector definitions
- Consumer spending definitions
- Financial definitions
- Currencies
- Sales tax rates
 - Figure 1: Europe: VAT rates, 2012-17
- Abbreviations

Executive Summary – Europe - The Market

- Spending on clothing and footwear
 - Figure 2: Europe: Spending on clothing, inc VAT, 2011-16
 - Figure 3: Europe: Spending on clothing and footwear, inc VAT, 2011-16
 - Figure 4: Europe: Change in clothing's share of all consumer spending, 2012-16
 - Figure 5: Europe: Change in clothing's share of all retail sales, 2012-16
- Spending per capita
 - Figure 6: Europe: Spending on clothing per capita, 2016
- Clothing and footwear specialists' sales
 - Figure 7: Europe: Clothing and footwear specialists, sales (ex-VAT), 2012-17
 - Figure 8: Europe: Clothing and footwear specialists, forecast sales (ex-VAT), 2018-22
- Specialists relative to all spending
 - Figure 9: Europe: Change in clothing and footwear retailers' share of all spending on clothing and footwear, 2012-16
- Online
 - Online buyers
 - Figure 10: EU: Proportion of people who have bought online in last 12 months, 2011-16
 - Figure 11: EU: Proportion of people who have bought clothing and sportswear online in the last 12 months, 2012-16
 - Online sales
 - Figure 12: Europe: Online sales of clothing in the leading economies (incl. VAT), 2015-16
- Leading retailers
 - Figure 13: Europe: Top 30 clothing specialists, sales 2014/15-2016/17
 - Figure 14: Europe: Top 30 clothing specialists, outlets 2014/15-2016/17
 - Figure 15: Europe: Top 30 clothing specialists, sales per outlet, 2014/15-2016/17
- Market shares
 - Figure 16: Top 30 clothing retailers, share of all spending on clothing and footwear, 2014/15-2016/17

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Market share winners and losers

Figure 17: Top 30 clothing specialists: Winners and losers of market share, 2016

What we think

Executive Summary – Europe – The Consumer

Where they shop

Market leaders by number of shoppers – In store

Figure 18: Europe: Most used clothing retailer, by country, September 2017

Market leaders by number of shoppers - Online

Figure 19: Europe: Most used clothing retailer online, by country, September 2017

Customers by channel

Specialists

Figure 20: Europe: Clothing buyers at clothing specialists, in-store vs online, September 2017

Department stores

Figure 21: Europe: Clothing buyers at department stores, in-store vs online, September 2017

Supermarkets

Figure 22: Europe: Clothing buyers at supermarkets, in-store vs online, September 2017

Attitudes to shopping for clothes

Figure 23: Europe: Level of agreement with attitude statements relative to the average, by country, September 2017

Executive Summary – Europe - Launch Activity and Innovation

Hema goes gender neutral

Figure 24: Hema's gender-neutral baby section, 2017

H&M flagships tempt customers with food offer

H&M's Barcelona flagship

Figure 25: Flax&Kale x H&M, 2017

Arket European expansion

Figure 26: Arket flagship store, Munich, 2017

Zalando delivery

Zalando Zet

Geolocation based delivery

Technical fabrics

Stone Island Ice Knit

Figure 27: Ice Knit yellow to orange jumper, 2017

Stain-proof fabrics

Figure 28: Labfresh stain resistant shirt, 2017

Sustainable clothing

C&A cradle-to-cradle

Figure 29: C&A cradle-to-cradle t-shirts, 2017

Houdini 'edible' clothing

Adidas customisable clothing

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Report Price: £2895.00 | \$3878.43 | €3282.64

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Figure 30: Adidas Knit for You, 2017

France

Overview

What you need to know

Areas covered in this report

Executive summary

The market

Spending and inflation

Figure 31: France: Consumer spending on clothing, 2012-17

Channels of distribution

Figure 32: France: Estimated distribution of spending on clothing and footwear, 2016

Sector size and forecast

Leading players

Key metrics

Market shares

Figure 33: France: Leading specialist clothing chains' shares of consumer spending on clothing and footwear, 2016

Online

The consumer

Where they shop

Figure 34: France: Where people shopped for clothing in the last 12 months by retailer, whether in-store or online, September 2017

Attitudes to shopping for clothes

Figure 35: France: Attitudes to shopping for clothes, September 2017

What we think

Issues and insights

Why are some French brands struggling while international retailers thrive?

The facts

The implications

Ethical and environmental concerns are growing

The facts

The implications

The market – What you need to know

Clothing market is low growth

Specialists dominate spending on clothing

Specialists sector in decline

Spending and inflation

Economy recovering, but growth subdued

Inflation

Figure 36: France: Consumer prices* of clothing and footwear, annual % change, 2012-16

Figure 37: France: Consumer prices* of clothing and footwear, annual % change, January 2016-August 2017

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

Clothing market is low growth

Figure 38: France: Consumer spending on clothing and footwear (incl. VAT), 2013-17

Market segmentation

Figure 39: France: Clothing market, estimated segmentation, 2012-16

Channels of distribution

Figure 40: France: Where people shopped for clothing in the last 12 months, by type of retailer, September 2017

Specialist sports shops

Footwear specialists

Department stores and mixed goods retailers

Hypermarkets strong at lower end of the market

Online expanding fast

Figure 41: France: Estimated distribution of spending on clothing and footwear, 2016

Sector size and forecast

Total retail sales recovering, further growth forecast in 2017

Specialist clothing sector is struggling

Figure 42: France: Specialist clothing retailers, sales (excl. VAT), 2013-17

Figure 43: France: Specialist clothing retailers, forecast sales (excl. VAT), 2017-22

Leading players – What you need to know

A sector in crisis

Structural change

Fragmented market

Clothing a significant part of growing online sector

Shopping for clothing online increasing

Online spending on clothing

Leading online players

Leading players

Market leader Vivarte restructuring

Eram: Gemo drops prices and ups digital innovations in-store

Crowded middle ground

Competition and casualties increasing

A new group emerging from the Mulliez family

Figure 44: France: Leading clothing specialists, sales (excl. VAT), 2012-16

Figure 45: France: Leading clothing specialists, outlets, 2012-16

Figure 46: France: Leading clothing specialists, sales per outlet, 2012-16

Market shares

Figure 47: France: Leading clothing specialists: Sales as % all spending on clothing and footwear, 2012-16

Online

Online development

Shopping for clothing online

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Clothing Retailing - Europe - October 2017

Report Price: £2895.00 | \$3878.43 | €3282.64

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Figure 48: France: Proportion of people saying they have bought clothing or sports goods online in the last year, 2011-16

Figure 49: France: Where people shopped for clothing online/by catalogue in the past 12 months by retailer, September 2017

Online clothing market size

Leading online players

Figure 50: France: Leading fashion/textiles retail sites by number of unique visitors, April-June 2017

Figure 51: France: Leading retailers' estimated online sales of clothing, 2016

The consumer – What you need to know

Clothing shopping near ubiquitous

Specialists most important channel, but lagging behind online

Sports retailers and grocers are significant non-specialists

Home-grown Kiabi the most popular, but Amazon growing

Customer profiles

Concern for the environment and where clothes come from

Quality more important to older, more affluent

Where they shop

Almost everyone buys clothes

Where they shop by type of retailer

Figure 52: France: Where people shopped for clothes in the last 12 months, by type of retailer, in-store vs online, September 2017

Customer profiles by type of retailer

Figure 53: France: Profile of clothing shoppers by type of retailer, September 2017

Where they shop: named retailers

Local retailer Kiabi ahead of international giant H&M

Amazon growing

Busy middle ground

Sports retailers and grocers popular...

...but department stores increasingly niche

Figure 54: France: Where people shopped for clothes in the last 12 months by retailer, whether in-store or online, September 2017

Customer profiles by named retailers

Figure 55: France: Profile of clothing shoppers by retailer, whether in-store or online, September 2017

Shopping online and in-store

Figure 56: France: Where people shopped for clothes in the last 12 months, in-store vs online/by catalogue, September 2017

Number of retailers used

Figure 57: France: Repertoire of where people shopped for clothes, whether in-store or online, September 2017

Figure 58: France: Profile of customers by number of outlets used, September 2017

Attitudes to shopping for clothes

"Green" credentials rank top

Where are my clothes from?

Quality

Men vs women

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Figure 59: France: Attitudes to shopping for clothes, September 2017

Figure 60: France: Profile of those who agree with attitude statements, September 2017

Attitudes by retailer

Figure 61: France: Attitudes to shopping for clothes, by people who shop at mid-market family clothing retailers, September 2017

Figure 62: France: Attitudes to shopping for clothes, by people who shop at fashion chains, September 2017

Figure 63: France: Attitudes to shopping for clothes, by people who shop at online/home shopping clothing retailers, September 2017

Appendix: Data sources, abbreviations and supporting information

Abbreviations

Data sources

Germany

Overview

What you need to know

Areas covered in this report

Executive summary

The market

Spending on clothing and footwear

Figure 64: Germany: Spending on clothing and footwear as % all retail sales, 2011-17

Inflation

Figure 65: Germany: Consumer prices for clothing and footwear – Annual % change, 2016-17

Consumer confidence

Figure 66: Germany: Consumer and retailer confidence levels, November 2016-August 2017

Channels of distribution

Figure 67: Germany: Estimated distribution of spending on clothing and footwear, 2016

Sector size and forecast

Leading players

Key metrics

Market shares

Figure 68: Germany: Leading clothing retailers, Sales as % all spending on clothing and footwear, 2014-16

Online

Figure 69: Europe: Proportion of people saying they have bought clothing or sports goods online in the last year, 2011-16

The consumer

Where they shop

Figure 70: Germany: Where people shopped for clothing in the last 12 months by type of retailer, in-store vs online, September 2017

Figure 71: Germany: Profile of clothing shoppers by type of retailer used, whether in-store or online, September 2017

Figure 72: Germany: Profile of clothing shoppers, by retailer, whether in-store or online, September 2017

Attitudes to shopping for clothes

Figure 73: Germany: Attitudes to buying clothes, September 2017

What we think

Issues and insights

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The market is changing

The facts

The implications

Online and in-store sales – Understanding each other's strengths

The facts

The implications

The market – What you need to know

Consumer confidence

Clothing and footwear spending underperforming

Inflation low

Clothing and footwear specialists take over half of category spending

Spending and inflation

Economy and consumer confidence

Figure 74: Germany: Consumer and retailer confidence levels, November 2016-August 2017

Inflation

Figure 75: Germany: Consumer prices of clothing and footwear, Annual % change, 2012-16

Figure 76: Germany: Consumer prices of clothing and footwear, annual % change, 2016-17

Consumer spending on clothing

Figure 77: Germany: Consumer spending (inc VAT), 2012-17

Figure 78: Germany: Spending on clothing and footwear as % all retail sales, 2011-17

Market segmentation

Figure 79: Germany: Clothing market, estimated segmentation, 2012-16

Channels of distribution

Figure 80: Germany: Estimated distribution of spending on clothing and footwear, 2016

Sector size and forecast

Clothing specialists recovering

Figure 81: Germany: Specialist clothing retailers' sales as % all spending on clothing, 2007-17

Figure 82: Germany: Specialist clothing retailers, sales (excl. VAT), 2012-17

Too early to forecast if the recovery will be sustained

Figure 83: Germany: Specialist clothing retailers, forecast sales (excl VAT), 2017-22

Leading players – What you need to know

Young fashion retailers are growing

Older focussed retailers are often struggling

Price-led retailers also doing well

Fragmented market

Online is growing

Leading players

Figure 84: Germany: Leading clothing specialists, sales (excl Vat), 2014-16

Figure 85: Germany: Leading clothing specialists, Outlets, 2014-16

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Figure 86: Germany: Leading clothing specialists, sales per outlet, 2014-16

Market shares

Figure 87: Germany: Leading clothing retailers, Sales as % all spending on clothing and footwear, 2014-16

Online

Shopping for clothing online

Figure 88: Europe: Proportion of people saying they have bought clothing or sports goods online in the last year, 2011-16

Online clothing market size

Leading online players

Figure 89: Germany: Online clothing sales of leading online clothing retailers (excl. Vat), 2014-16

Figure 90: Germany: Leading online pure players, Clothing sales as % all spending on clothing and footwear, 2014-16

The consumer – What you need to know

Specialists losing out

Sales per customer lower online

Shops and home shopping used interchangeably

Shopper profiles

Younger shoppers use more outlets

Quality more important than fashion

Green attitudes

Where they shop

Figure 91: Germany: Where people shopped for clothes in the last 12 months, by type of retailer, September 2017

Figure 92: Germany: Where people shopped for clothes in the last 12 months, September 2017

Online growing

Figure 93: Germany: Proportion of shoppers at department stores, in-store and online, 2014, 2016, 2017

Figure 94: Germany: Proportion of online shoppers, 2014, 2016, 2017

Customer profiles by type of retailer

Figure 95: Germany: Profile of clothing shoppers by type of retailer, whether in-store or online, September 2017

Customer profiles by named retailers

Figure 96: Germany: Profile of clothing shoppers, by retailer, whether in-store or online, September 2017

Number of retailers used

Figure 97: Germany: Repertoire of where people shopped for clothes, whether in-store or online, September 2017

Figure 98: Germany: Profile of customers by number of clothing outlets used, whether in-store or online, September 2017

Attitudes to shopping for clothes

Figure 99: Germany: Attitudes to shopping for clothes, September 2017

Figure 100: Germany: Profile of those who agree with attitude statements, September 2017

Attitudes by retailer

Figure 101: Germany: Attitudes to shopping for clothes, by people who shop at mass market multiples, September 2017

Figure 102: Germany: Attitudes to shopping for clothes, by people who shop at department stores (incl. P&C), September 2017

Figure 103: Germany: Attitudes to shopping for clothes, by people who shop at online pureplayers, September 2017

Appendix – Data sources, abbreviations and supporting information

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Abbreviations

Data sources

Italy

Overview

What you need to know

Areas covered in this report

Executive Summary

The market

Spending and inflation

Figure 104: Italy: Annual percentage change in consumer spending on clothing and footwear (incl VAT), 2013-17

Channels of distribution

Figure 105: Italy: Estimated distribution of spending on clothing and footwear, 2016

Sector size and forecast

Figure 106: Italy: Annual percentage change in clothing, footwear and textiles specialists' sales (excl VAT), 2013-17

Leading players

Market shares

Figure 107: Italy: Leading clothing specialists: Sales as % all spending on clothing and footwear, 2016

Online

The consumer

Where they shop

Figure 108: Italy: Where people shopped for clothes by type of retailer, in-store vs online, September 2017

Attitudes to shopping for clothes

Figure 109: Italy: Attitudes to shopping for clothes, September 2017

What we think

Issues and insights

Online is a key driver of growth

The facts

The implications

Environmental and ethical credentials are important to consumers

The facts

The implications

The market – What you need to know

Economy weak

Inflation just staying positive

Consumer spending on clothing and footwear slowed in 2016

Specialists dominate the sector

Clothing retailers may see their share of retail sales slip back

Spending and inflation

Consumer confidence weak

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Figure 110: Italy: Consumer and retailer confidence levels, November 2016-August 2017

Inflation

Figure 111: Italy: Consumer prices of clothing and footwear, Annual % change, 2012-16

Figure 112: Italy: Consumer prices of clothing and footwear, annual % change, January 2016-August 2017

Spending on clothing

Figure 113: Italy: Consumer spending on clothing and footwear (incl VAT), 2012-17

Market segmentation

Figure 114: Italy: Clothing market, estimated segmentation, 2012-16

Channels of distribution

Figure 115: Italy: Estimated distribution of spending on clothing and footwear, 2016

Sector size and forecast

Department stores weak

Slow but steady structural change

Figure 116: Italy: Specialist clothing retailers, sales (excl. VAT), 2013-17

Figure 117: Italy: Specialist clothing retailers, forecast sales (excl. VAT), 2018-22

Leading players – What you need to know

An evolving sector

Young fashion retailers growing fastest, and older brands struggling

Foreign brands prominent

Fragmented market

Online growing fast – Amazon investing

Leading players

Sector is evolving and changing

Young fashion retailers growing fastest, and now Primark is here...

Many older, established brands are struggling

OVS leads the market

Gruppo Teddy a local fast fashion group

Foreign brands

Figure 118: Italy: Leading clothing specialists, sales (excl VAT), 2012-16

Figure 119: Italy: Leading clothing specialists, outlets, 2012-16

Figure 120: Italy: Leading clothing specialists, sales per outlet, 2012-16

Market shares

Figure 121: Italy: Leading clothing specialists: sales as % all spending on clothing and footwear, 2012-16

Online

The online sector as a whole

Shopping for clothing online

Figure 122: Italy: Proportion of people saying they have bought clothing or sports goods online in the last year, 2011-16

Online market size

Leading online players

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Specialists

Figure 123: Italy Where people shopped for clothing online/by catalogue in the past 12 months by retailer, September 2017

Figure 124: Italy: Leading retailers' estimated online sales of clothing, 2016

The consumer – What you need to know

Specialists still dominant

Enthusiastic shoppers

Shopper profiles

Increasingly shoppers use online and in-store interchangeably

Quality more important than fashion

Green attitudes

Where they shop

Figure 125: Italy: Where people shopped for clothes in the last 12 months by type of retailer, in-store vs online, September 2017

Figure 126: Italy: Where people shopped for clothes in the last 12 months by retailer, in-store vs online, September 2017

Figure 127: Italy: Proportion of shoppers at department stores, instore vs online, 2014, 2016, 2017

Figure 128: Italy: Proportion of online shoppers, 2014, 2016, 2017

Profile of shoppers

Figure 129: Italy: Profile of clothing shoppers by type of retailer, whether in-store or online, September 2017

Figure 130: Italy: Profile of clothing shoppers, by retailer, whether in-store or online, September 2017

Number of retailers used

Figure 131: Italy: Repertoire of where people shopped for clothes, whether in-store or online, September 2017

Figure 132: Italy: Profile of customers by number of outlets used, September 2017

Attitudes to shopping for clothes

Figure 133: Italy: Attitudes to shopping for clothes, September 2017

Figure 134: Italy: Profile of those who agree with attitude statements, September 2017

Attitudes by retailer

Figure 135: Italy: Attitudes to shopping for clothes, by retailer used, September 2017

Figure 136: Italy: Attitudes to shopping for clothes, by retailer used (continued), September 2017

Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

Spain

Overview

What you need to know

Areas covered in this report

Executive Summary

The market

Spending on clothing and footwear

Figure 137: Spain: Consumer spending on clothing and footwear (incl VAT), 2013-17

Channels of distribution

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Sector size and forecast

Leading players

Key metrics

Market shares

Figure 138: Spain: Leading clothing specialists, sales as % all spending on clothing and footwear, 2016

Online

The consumer

Where they shop

Figure 139: Spain: Where people shopped for clothes in the last 12 months, in-store vs online, September 2017

Figure 140: Spain: Repertoire of where people shopped for clothes, whether in-store or online, September 2017

Attitudes to shopping for clothes

Figure 141: Spain: Attitudes to shopping for clothes, September 2017

Figure 142: Spain: Agreement with statement 'I prefer to shop at retailers that have frequently updated ranges, by country, September 2017

What we think

Issues and insights

Who are the winners and losers in clothing retail in Spain?

The facts

The implications

What are the opportunities for driving sales in Spain?

The facts

The implications

The market – What you need to know

Clothing market to grow 3.7%

Inflation climbs

Womenswear grows faster than menswear

Specialists take two-thirds of spending

Clothing specialists outperform

Spending and inflation

Spain among fastest growing economies in eurozone

Figure 143: Spain: Retail confidence and consumer confidence indicator, January 2016-July 2017

Inflation climbs

Figure 144: Spain: Consumer prices* of clothing and footwear, annual % change, 2012-16

Figure 145: Spain: Consumer prices* of clothing and footwear, annual % change, January 2016-June 2017

Clothing market to grow 3.7%

Figure 146: Spain: Consumer spending on clothing and footwear (incl VAT), 2013-17

Market segmentation

Figure 147: Spain: Clothing retail market segmentation, 2015 and 2016

Channels of distribution

Figure 148: Spain: Estimated distribution of consumer spending on clothing and footwear, 2016

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Sector size and forecast

Clothing specialists outperform

Figure 149: Spain: Specialist clothing retailers, Sales (excl VAT), 2013-17

Figure 150: Spain: Specialist clothing retailers, sales forecasts (excl VAT), 2018-22

Leading players – What you need to know

Primark see the strongest growth

Inditex closes stores

Inditex and Primark grab share

Online spend grows

Privalia leading pureplay in Spain

Leading players

Figure 151: Spain: Leading clothing specialists, sales (excl VAT), 2013-16

Figure 152: Spain: Leading clothing specialists, outlets, 2014-16

Figure 153: Spain: Leading clothing specialists, Sales per outlet, 2014-16

Market shares

Figure 154: Spain: Leading clothing specialists, sales as % all spending on clothing and footwear, 2016

Figure 155: Spain: Leading clothing specialists, sales as % all spending on clothing and footwear, 2013-16

Online

Online development

Online market size

Shopping for clothing online

Figure 156: Spain: Proportion of people saying they have bought clothing or sports goods online in the last year, 2011-16

Where people shop online

Figure 157: Spain: Where people shopped for clothes online in the last 12 months, September 2017

Leading online players

Figure 158: Spain: Leading online retailers, estimated online sales of clothing and footwear (ex vat), 2014-16

The consumer – What you need to know

El Corte Inglés most popular for clothes

Spaniards shopping more online

H&M leads in youth fashion

Spanish women shop around

Great interest in transparency

Spanish demand most newness

Where they shop

El Corte Inglés most popular for clothes shopping

Figure 159: Spain: Where people shopped for clothes in the last 12 months, whether in-store or online, September 2017

H&M leads for youth fashion

Spaniards shop more online

Figure 160: Spain: Where people shopped for clothes in the last 12 months, by type of retailer, in-store vs online, September 2017

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Customer profiles by type of retailer

Figure 161: Spain: Profile of clothing shoppers by type of retailer, whether in-store or online, September 2017

Zara grows online shoppers

Figure 162: Spain: Where people shopped for clothes in the last 12 months by retailer, in-store vs online, September 2017

Customer profiles by named retailers

Figure 163: Spain: Profile of clothing shoppers by retailer, whether in-store or online, September 2017

Spanish women shop around

Figure 164: Spain: Repertoire of where people shopped for clothes, whether in-store or online, September 2017

Attitudes to shopping for clothes

Great interest in transparency

Figure 165: Spain: Attitudes to shopping for clothes, September 2017

Spanish demand most newness

Figure 166: Spain: Agreement with statement 'I prefer to shop at retailers that have frequently updated ranges, by country, September 2017

Attitudes by retailer

Figure 167: Spain: Attitudes to shopping for clothes, by people who shop at clothing specialists, September 2017

Figure 168: Spain: Attitudes to shopping for clothes, by people who shop at non-clothing specialists, September 2017

Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

UK

Overview

What you need to know

Products covered in this report

Executive summary

The market

Clothes sales to grow 3.1% in 2017

Figure 169: UK: Best- and worst-case forecast for consumer spending on clothing and accessories (incl VAT), 2012-22

Clothing specialist sales grow only 2.4%

Figure 170: UK: Clothing specialists' estimated share of spending on clothing, 2012-17

Companies and brands

Innovative brands continue to outperform

Figure 171: UK: Leading specialist retailers: compound annual growth in revenues, 2012-16

Online clothing market to reach £13.9 billion

Figure 172: UK: Estimated market shares of online sales of clothing and footwear, 2015-16

Boohoo has highest level of recommendation

Figure 173: UK: Attitudes towards and usage of selected brands, February, May and August 2017

The consumer

Supermarkets become fashion destination

Figure 174: UK: Retailers from where clothes are bought both in-store and online, July 2017

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Most buy every few months or less

Figure 175: UK: How often consumers have bought clothes in the last 12 months, July 2017

Most interest in food and drink areas

Figure 176: UK: Interest in additional services at retailers' stores, July 2017

Young women want newness

Figure 177: UK: Attitudes to shopping for clothes, July 2017

Over-45s like try-before-you-buy option

Figure 178: UK: Interest in in-store or online innovations, July 2017

What we think

Issues and insights

How has the clothing sector performed in 2017 and who is driving sales?

The facts

The implications

Who are the winners and losers in clothing?

The facts

The implications

What are the opportunities for driving sales?

The facts

The implications

The market – What you need to know

Rising inflation hits clothing

Consumer confidence dips

Clothes sales to grow 3.1% in 2017

Clothing market will reach £69 billion by 2022

Childrenswear drives growth

Clothing specialist sales grow only 2.4%

Market drivers

Rising inflation hits clothing

Figure 179: UK: Consumer prices inflation for garments, Jul 2016-Jul 2017

Figure 180: UK: Consumer prices inflation for garments, 2006-16

Footwear sees higher levels of discounting

Figure 181: UK: Consumer prices inflation for accessories and footwear, Jul 2016-Jul 2017

Inflation versus spending growth

Figure 182: UK: Annual percentage change in spending on clothing (including accessories) versus annual percentage change in consumer prices inflation in clothing, 2013-16

Consumer confidence drops

Figure 183: UK: Trends in consumer sentiment for the coming year, Jan 2016-Aug 2017

Obesity soars among young men

Figure 184: UK: Proportion of overweight and obese population, by gender, 2010-15

Ageing population impacts sector

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Market size and forecast

Clothes sales to grow 3.1% in 2017

Figure 185: UK: Best- and worst-case forecast for consumer spending on clothing and accessories (incl VAT), 2012-22

The future

Figure 186: UK: Consumer spending on clothing and accessories (incl VAT) at current prices, 2012-22

Consumers continue to spend on clothes

Figure 187: UK: Spending on clothing and accessories as percentage of all consumer spending, 2012-17

Childrenswear drives growth

Figure 188: UK: Estimated distribution of spending on clothing, by sub-category, 2017

Forecast methodology

Sector size and forecast

Clothing specialist sales grow only 2.4%

Figure 189: UK: Best- and worst-case forecast of clothing specialists' sector sales (incl. VAT), 2012-22

Figure 190: UK: Clothing specialist sales (incl VAT), 2012-22

Specialists' sales of clothing

Figure 191: UK: Estimated sales of clothing by clothing specialist retailers (incl VAT), 2012-17

Specialist sales of clothing spend declines

Figure 192: UK: Clothing specialists' estimated share of spending on clothing, 2012-17

Key players – What you need to know

Next still in the lead despite declines

Innovative brands continue to outperform

Half of the top players are non-specialists

Online clothing market to reach £13.9 billion

Clothing retailers turn to visual search apps

Boohoo has highest level of recommendation

Leading specialist retailers

Next still in the lead despite declines

Figure 193: UK: Leading specialist retailers, net revenues. 2012-16

Innovative brands continue to outperform

Figure 194: UK: Leading specialist retailers: compound annual growth in revenues, 2012-16

Outlet numbers and sales per outlet

Figure 195: UK: Leading specialist retailers: outlet numbers, 2012-16

Sales per outlet

Figure 196: UK: Leading specialist retailers: annual sales per outlet, 2012-16

Sales area and sales densities

Figure 197: UK: Leading specialist retailers: total sales area, 2012-16

Figure 198: UK: Leading specialist retailers: annual sales per sq m, 2012-16

Operating profits and margins

Figure 199: UK: Leading specialist retailers: operating profits, 2012-16

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Figure 200: UK: Leading specialist retailers: operating margins, 2012-16

Market shares

Half of the top players are non-specialists

Figure 201: UK: Leading retailers' share of spending on clothing and footwear, 2014-16

Department stores lose share

M&S clothing share continues to drop

Figure 202: UK: M&S's share of spending on clothing and footwear, 2009-16

Leading non-specialist retailers

Online-only retailers see strongest growth

JD Sports outperforms Sports Direct

Figure 203: UK: Leading non-specialist retailers: net clothing and footwear revenues, 2014-16

Channels of distribution

Pureplays gain share

Figure 204: UK: Estimated distribution of consumer spending on clothing by type of retailer, 2016 and 2017

Grocers grow focus on clothing

Figure 205: UK: Estimated distribution of consumer spending on clothing by type of retailer, 2015- 17

Specialists lose share further

Figure 206: UK: Clothing specialists' estimated share of spending on clothing, 2012-17

Space allocation summary

Men's, women's and children's wear overview

Figure 207: UK: Men's, women's and children's wear overview, October 2017

Detailed category space allocation

Figure 208: UK: Specialist and non-specialist clothing retailers, estimated detailed space allocation by category, October 2017

Figure 209: UK: Specialist and non-specialist clothing retailers, estimated detailed space allocation by category, October 2017

Figure 210: UK: Specialist and non-specialist clothing retailers, estimated detailed space allocation by category, October 2017

Clothing versus non-clothing space

Figure 211: UK: Specialist and non-specialist clothing retailers, estimated clothing versus non-clothing space, October 2017

Retail product mix

Figure 212: UK: Leading clothing retailers, estimated sales by product, 2016

Figure 213: UK: Leading clothing retailers: share of clothing sales by product, 2016

Figure 214: UK: Leading clothing retailers, estimated sales density by product, 2016

Womenswear

Figure 215: UK: Leading clothing retailers, Estimated share of womenswear market, 2016

Menswear

Figure 216: UK: Leading clothing retailers, Estimated share of menswear market, 2016

Childrenswear

Figure 217: UK: Leading clothing retailers, Estimated share of Childrenswear market, 2016

Online

Online clothing and accessories market to reach £13.9 billion

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Figure 218: UK: Estimated online sales of clothing and footwear (incl VAT), 2014-17

Online market shares

Figure 219: UK: Estimated market shares of online sales of clothing and footwear, 2015-16

Where do people shop online for clothes?

Figure 220: UK: Types of retailers where clothes were bought online in the last 12 months, July 2017

Figure 221: UK: Retailers where clothes were bought online in the last 12 months, July 2017

Launch activity and innovation

Clothing retailers turn to visual search apps

Figure 222: ASOS visual search option, 2017

Gender neutral clothing

John Lewis childrenswear goes genderless

Figure 223: John Lewis gender neutral range, 2017

Unisex adult clothing

Figure 224: LaneFortyFive unisex clothing, 2017

Modest fashion

Figure 225: Nike Pro Hijab, 2017

Personalisation

3D knitwear

Figure 226: Adidas 3D knitwear printing, 2017

Omnichannel approach

Missguided open first physical store

Figure 227: Missguided stores digital displays, 2017

Farfetch store of the future

Figure 228: Phone app for Farfetch 'store of the future', 2017

Next to open in-store restaurant

Sustainability

Figure 229: Oasis x ZSL collection, 2017

Try before you buy

Figure 230: The Chapar personal styling service offering try before you buy, 2017

Amazon Prime Wardrobe

Net-a-Porter – You Try, We Wait

Advertising and marketing activity

Increased advertising spend by major sports retailers

Figure 231: UK: Total above-the-line, online display, and direct mail advertising expenditure on clothing and accessories, top 30 spenders, 2013-17

M&S Spend It Well

H&M: She's a lady

Figure 232: Video still from H&M's she's a lady campaign, 2016

'Why would anyone shop at TK Maxx?'

Figure 233: TK Maxx Ridiculous Possibilities campaign, 2017

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Press remains top medium for advertising spend

Figure 234: UK: Total above-the-line, online display and direct mail advertising expenditure on clothing, by media type, 2016

Nielsen Ad Intel coverage

Brand research

What you need to know

Brand map

Figure 235: UK: Attitudes towards and usage of selected brands, February, May and August 2017

Key brand metrics

Figure 236: UK: Key metrics for selected brands, February, May and August 2017

Brand attitudes: Supermarkets offer good value

Figure 237: UK: Attitudes, by brand, February, May and August 2017

Brand personality: M&S tired and boring, while Boohoo is fun and vibrant

Figure 238: UK: Brand personality – Macro image, February, May and August 2017

Young fashion brands seen as trendsetting and stylish

Figure 239: UK: Brand personality – Micro image, February, May and August 2017

Brand analysis

Mid-market retailers: M&S, Next, and Mango

Lifestyle retailers: Joules, Fat Face, and Cos

Supermarket retailers: F&F, Tu, George, and Nutmeg

Young fashion retailers: Topshop/Topman, H&M, New Look, Boohoo, and River Island

What fashion items people buy

Young men keen clothes shoppers

Figure 240: UK: Spending habits on clothes, footwear and accessories, June 2017

Jeans on trend

Figure 241: UK: Types of outerwear purchased in the last three months, June 2017

Retail customer profile comparison

Amazon grows female focus

Figure 242: UK: Customer profile, by gender, July 2017

Rise in 25-34s shopping for clothes

Figure 243: UK: Customer profile, by age, July 2017

Figure 244: UK: Customer profile, by socio-economic group, July 2017

Where people shop for clothes

Supermarkets become fashion destination

Figure 245: UK: Retailers from where clothes are bought both in-store and online, July 2017

Primark, M&S and Next all see declines

Sports shops lose out to non-specialists

Young women opt to shop at pureplays

Figure 246: UK: Retailers from where clothes are bought split by in-store and online, July 2017

Who is driving growth?

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Figure 247: UK: 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, July 2017

Repertoire analysis

Figure 248: UK: Repertoire of retailers from which clothes are bought in-store or online, July 2017

Frequency of buying clothes

Most buy every few months or less

Figure 249: UK: How often consumers have bought clothes in the last 12 months, July 2017

Young men buy clothes less often

Figure 250: UK: Consumers who have bought clothes once a month or more, by gender and age, July 2017

Affluent buy clothes less often

Figure 251: UK: How often consumers have bought clothes in the last 12 months, by financial situation, July 2017

Interest in additional store services

Most interest in food and drink areas

Figure 252: UK: Interest in additional services at retailers' stores, July 2017

High demand from under-35s for beauty services

Figure 253: UK: Interest in additional services at retailers' stores, by gender and age, July 2017

Attracting older women with VIP events

Attitudes to shopping for clothes

Young women want newness

Figure 254: UK: Attitudes to shopping for clothes, July 2017

70% of 16-24s want more eco fashion

Women demand more diverse models

Figure 255: UK: Clothing retailing – CHAID – Tree output, August 2017

Methodology

Arcadia Group

What we think

Topshop loses its appeal

Dorothy Perkins falls behind other retailers

Dealing with loss-making brands

Company background

Company performance

Figure 256: Arcadia Group: Group financial performance, 2011/12-2016/17

Figure 257: Arcadia Group: Outlet data, 2012/13-2016/17

Retail offering

Asda Group

What we think

A major player in clothing retailing

Looking to become leaner

Toyou service continues to drive footfall into stores

Rumoured B&M deal would give Asda another outlet for clothing

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Where now?

Company background

Company performance

Figure 258: Asda Group Ltd: Group financial performance, 2012-16

Figure 259: Asda Group Ltd: Outlet data, 2012-16

Retail offering

ASOS

What we think

Tapping into consumer demand for newness

Exclusivity differentiates the brand and gives consumers more reason to visit

M-commerce fuelling sales growth

Bolstering ethical and environmental credentials

Significantly enhancing its US proposition

Company background

Company performance

Figure 260: ASOS: Group financial performance, 2011/12-2015/16

Retail offering

C&A

What we think

Restructuring aims to return company to growth by 2021

New European boss brought in to develop omnichannel

Company background

Company performance

Figure 261: C&A: Group sales performance, 2012/13-2016/17

Figure 262: C&A: Outlet data, 2012/13-2016/17

Figure 263: C&A (Europe): Outlets by country, October 2017

Retail offering

Grupo Cortefiel

What we think

New owners pledge to invest in Grupo Cortefiel

Strong growth under new management

Expanded payment option to facilitate quicker customer transactions

Slower growth in Europe prompts expansion into new territories

Company background

Company performance

Figure 264: Grupo Cortefiel: Group sales performance, 2012/13-2016/17

Figure 265: Grupo Cortefiel: Outlet data, 2012/13-2016/17

Retail offering

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Debenhams

What we think

New strategy to lure shoppers back to its stores

Veteran designers could face the axe in own-fashion range shake-up

Extended lingerie offering

'Mobile first' strategy driving e-commerce sales

Innovative click-and-collect experience planned to encourage incremental business

Broadening its customer reach through third-party online partners

Company background

Company performance

Figure 266: Debenhams: Group financial performance, 2011/12-2015/16

Figure 267: Debenhams: Outlet data, 2011/12-2015/16

Retail offering

Edinburgh Woollen Mill

What we think

Another wave of acquisitions

On the lookout for more

Bringing a new department store to the market

Company background

Company performance

Figure 268: The Edinburgh Woollen Mill Group: Group financial performance, 2012/13-2016/17

Figure 269: The Edinburgh Woollen Mill Group: Outlet data, 2012/13-2016/17

Retail offering

El Corte Inglés

What we think

Merger between El Corte Inglés and Hipercor

Figure 270: El Corte Inglés/Hipercof store, 2017

Sfera continues its international expansion

Commitment to increased digitisation

Figure 271: El Corte Inglés and Samsung Pay partnership, 2017

Company background

Company performance

Figure 272: El Corte Inglés: Group financial performance, 2012/13-2016/17

Figure 273: El Corte Inglés: Outlet data, 2012/13-2016/17

Retail offering

Esprit

What we think

Downsizing is happening but slowly

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Time for menswear exit?

Online pause hopefully a temporary blip

Where now?

Company background

Company performance

Figure 274: Esprit Europe: Group financial performance, 2012/13-2016/17

Figure 275: Esprit Europe: Outlet data, 2012/13-2016/17

Retail offering

Etam Group

What we think

Market leader in lingerie in France

1.2.3

Problems in China

Digitally integrated

Company background

Company performance

Financial results

Figure 276: Etam Group: Group financial performance, 2012-16

H1 2017 results

Stores

Figure 277: Etam Group: Outlet data, 2012-16

Retail offering

H&M Hennes & Mauritz

What we think

Looking beyond fast fashion

A more seamless shopping experience

New designer collection aims to appeal to fashion conscious male shoppers

New loyalty scheme with exclusive offers and brand experiences

Focusing on offering sustainable finishing processes and eco-friendly materials

Company background

Company performance

Figure 278: H&M Hennes & Mauritz: Group financial performance, 2011/12-2015/16

Figure 279: H&M Hennes & Mauritz: Outlet data, 2011/12-2015/16

Retail offering

House of Fraser

What we think

Refreshing flagging womenswear offering

New fashion concept

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Lifestyle-led in-store experiences to drive footfall and extend dwell time

£25 million upgrade of e-commerce platform to double online sales

Company background

Company performance

Figure 280: House of Fraser Plc: Group financial performance, 2012/13-2016/17

Figure 281: House of Fraser Plc: UK & Ireland outlet data, 2012/13-2016/17

Retail offering

Grupo Inditex

What we think

Inditex retains strong position but must continue to innovate

Brand extensions

Figure 282: Stradivarius menswear collection, 2017

Figure 283: Pull&Bear beauty range, 2017

Digital innovations

Company background

Company performance

Figure 284: Grupo Inditex: Group financial performance, 2012/13-2016/17

Figure 285: Grupo Inditex: % share of sales, by retail brand, 2015/16-2016/17

Figure 286: Grupo Inditex: Sales and operating profit, by major retail brand, 2012/13-2016/17

Figure 287: Grupo Inditex: Outlet data, by region, at January 2017

Figure 288: Grupo Inditex: Store numbers, by retail brand, at January 2016 and January 2017

Figure 289: Grupo Inditex: Outlet data, 2012/13-2016/17

Retail offering

John Lewis

What we think

A focus on exclusivity

Investment in experience-driven stores

Improved information to streamline the shopping experience

Company background

Company performance

Figure 290: John Lewis Plc (department store): Group financial performance, 2012/13-2016/17

Figure 291: John Lewis Plc (department store): Outlet data, 2012/13-2016/17

Retail offering

Kiabi

What we think

Ambitious expansion plans

The threat of Primark

Company background

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Company performance

Figure 292: Kiabi: Group financial performance, 2012-16

Figure 293: Kiabi: Outlet data, 2012-16

Retail offering

KiK

What we think

KiK17 store concept

Charles Vögele stores acquisition

Entering the US market in 2019

Bridging the gap between in-store and online shopping

Bolstering eco and social responsibility credentials

Company background

Company performance

Figure 294: KiK: Group sales performance, 2012-16

Figure 295: KiK: Outlet data, 2012-16

Retail offering

Marks & Spencer

What we think

Repositioning clothing

Reshaping its stores

Online

Company background

Company performance

Figure 296: Marks & Spencer: Group financial performance, 2012/13-2016/17

Figure 297: Marks & Spencer: Outlet data, 2012/13-2016/17

Retail offering

Matalan

What we think

Investment in product quality driving full-price sales

Extensive store refurbishment programme

Exploring international sales growth opportunities

Bespoke fashion and style show enhances online presence

Influencer-generated content boosts fashion credentials

Parcel pick-up service is an opportunity to drive store footfall

Company background

Company performance

Figure 298: Matalan Ltd: Group financial performance, 2012/13-2016/17

Figure 299: Matalan Ltd: Outlet data, 2012/13-2016/17

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Retail offering

New Look

What we think

Focused on delivering trends to market faster

Fewer discounts and promotions

Multichannel sales potential compromised by slumping website traffic and sales

Expanded menswear proposition

Tailored ranges and domestic sourcing helps boost business in China

Recruiting social media influencers to drive brand awareness and identify trends quicker

Company background

Company performance

Figure 300: New Look Group Plc: Group financial performance, 2012/13-2016/17

Figure 301: New Look Group Plc: Outlet data, 2012/13-2016/17

Retail offering

Next Group

What we think

Pushing too hard for flexibility?

A bold strategy...

...which could leave it exposed

Giving customers more reason to visit stores

Devaluation impact on prices is diminishing

Where now?

Company background

Company performance

Figure 302: Next Group: Group financial performance, 2012/13-2016/17

Figure 303: Next Group: Outlet data, 2012/13-2016/17

Retail offering

OVS

What we think

Conversion of Charles Vögele stores yielding positive results

Online sales triple in 2016

Proximity marketing to drive store footfall

New multichannel shopping service

Faster and simpler payment solution

New material procurement policy to reduce environmental impact

Company background

Company performance

Figure 304: OVS group: Group financial performance, 2012-16

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Figure 305: OVS group: Outlet data, 2012-16

Retail offering

Primark

What we think

Getting the product right

Competition intensifying from rivals

Brexit impact mitigated but price rises a possibility

Should Primark have a transactional website?

Where next?

Company background

Company performance

Figure 306: Primark/Penneys: Group financial performance, 2012/13-2016/17

Figure 307: Primark/Penneys: Outlet data, 2012/13-2016/17

Retail offering

River Island

What we think

Avoiding seasonal fashion marketing

Integrating influencer-generated content

Seamless cross-channel shopping experience

Customer-facing digital enhancements streamline the in-store shopping experience

Improved stock availability boosting store sales

Pushing for a bigger slice of the children's clothing market

Cutting-edge canine fashion

Preparing to launch its own homewares

Company background

Company performance

Figure 308: River Island Clothing Co Ltd: Group financial performance, 2012-16

Figure 309: River Island Clothing Co Ltd: Outlet data, 2012-16

Retail offering

Tesco

What we think

Leading the pack with online innovations

Making stores work harder

Where next?

Company background

Company performance

Figure 310: Tesco Plc: Group financial performance, 2012/13-2016/17

Figure 311: Tesco Plc: Outlet data, 2012/13-2016/17

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Retail offering

TJX International (TK Maxx Europe)

What we think

Room for growth

Attracting a broad demographic

Launching new loyalty scheme in the UK and Ireland

Company background

Company performance

Figure 312: TJX International (TK Maxx Europe): Group financial performance, 2012/13-2016/17

Figure 313: TJX International (TK Maxx Europe): Outlet data, 2012/13-2016/17

Retail offering

Vivarte

What we think

Will the restructuring work?

Online

Company background

Company performance

Figure 314: Vivarte: Group sales performance, 2011/2-2015/16

Figure 315: Vivarte: Store numbers, 2011/12-2015/16

Retail offering

Figure 316: Vivarte: Clothing brands (unsold businesses only), October 2017

La Halle

YNAP Group

What we think

The future: more investment in technology

Company background

Company performance

Figure 317: YNAP group: Group financial performance, 2014-16

Retail offering

Zalando

What we think

Mobile is at the heart of the business

Prioritising delivery to drive customer loyalty

Geo-localised delivery being trialled

Moving from following to leading

Integrated commerce links up online and offline channels

Fulfilment service reaches out to brands

Company background

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Company performance

Figure 318: Zalando: Group financial performance, 2012-16

Figure 319: Zalando: Key metrics, 2015-H1 2017

Retail offering

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