

Officewear - UK - December 2009

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What is this report about?

The market for clothing worn to the office has become immense as the less formal dress code of smart/casual has come to dominate a large proportion of UK offices and allowed an ever wider variety of fashion retailers to contribute to the working wardrobe. Over the long term, this trend has eroded sales of formal office apparel such as suits, ties and shirts. However, the recession has brought about a change in the way that workers dress, with the adoption of a more 'professional' image in the light of growing job cuts.

Mintel examines the impact of economic factors on clothing sales and examines the preferences of the working consumer in terms of formal or casual dress styles and the outlets where they purchase their working wardrobe.

What have we found out?

- Almost three in ten of the more affluent working population wear a combination of casual wear and formal wear to work, while a further three in ten wears only casual clothing, revealing the extent to which workplace dress codes have become more relaxed over time.
- A relatively small proportion (just one in ten) have bought smarter officewear in the last 12 months to get ahead at work. But they are a dynamic group and, generally, biased towards 25-34-year olds. Reflected in the upgrading of their officewear, this group of young consumers have become serious about their careers. .
- Loyalty to preferred clothing outlets is a major driver in this market: a third of consumers tend to return to the same stores every time. This buying behaviour is most popular among the senior- and middle-management, setting in after the age of 25 yrs old.
- Quality is essential to stores' officewear offering as almost three in ten workers don't mind paying more for quality.
- Fashion stores Marks & Spencer and Next are the most popular shops for buying officewear among UK consumers. But discount retailers (such as Primark and Matalan) and grocery multiple (such as Asda) have benefited from the widespread trend for trading down in the current economic climate.
- Formal officewear shoppers are under-represented at stores such as Matalan, Asda, Primark and Tesco. Nor are such stores really the first port of call for the older, more affluent or more aspirational formal wear consumers who prefer to shop in department stores.

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