

Clothing Retailing - Ireland - October 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

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



“Despite the Irish economy witnessing high levels of consumer confidence in 2015, value-for-money retailers remain the most popular stores in Ireland. As the trend of fast fashion consumption continues to accelerate, we will likely see more Irish consumers opting for value retailers for their cheaper prices – enabling shoppers to remain on-trend with the latest fashion without breaking the bank.”

– Emma McGeown, Research Analyst

This report looks at the following areas:

- Who are the key retailers operating in the NI and ROI clothing market?
- How is online shopping faring in ROI?
- What impact have changes in the cost of clothing had on the Irish clothing retail market?
- What is the consumer satisfaction with clothes purchased?
- What impacts how consumers dress?

The clothing retail market for all Ireland has shown growth in 2014 with this growth set to continue into 2015, with an increase in clothing sales expected this year. For the first time since 2011, high street sales are expected to increase, however, not quite at the same rate as value-oriented retailers who are still experiencing the most growth year on year in ROI.

Moving forward, consumers will continue to remain conscious of their spending – making sure their shopping sprees are justified. However, this frugal behaviour witnessed in consumers in recent years has also led to a new market emerging – the clothes swapping market, which has a number of big players including eBay and start-ups such as Swishing and Depop cashing in on this market.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
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

EMAIL:
reports@mintel.com

DID YOU KNOW?

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

Clothing Retailing - Ireland - October 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

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

Table of Contents

Introduction

Key themes of the report
Definition
Consumer data
Data sources
Abbreviations

Executive Summary

The market

Figure 1: Estimated market value of Irish clothing retailing market, IoI, RoI and NI, 2010-20
Figure 2: Estimated market value of Irish clothing retailing market, by sector, IoI, in millions, 2015

Market factors

Clothes prices drop in RoI
Irish consumer financial health continues its uphill trend

Almost a third shop online using smartphones

Figure 3: Consumers who have bought clothing, footwear and accessories online in the last 12 months, by device, NI and RoI, December 2014

Clothes swapping takes away from clothes shopping

Visa spending is up in 2015

The consumer

Value retailers prove most popular for in-store shopping

Figure 4: High street and value retailers shopped in for clothes in the last 12 months, in-store and online, NI and RoI, August 2015
Figure 5: Supermarkets, online-only stores and other retailers shopped in for clothes in the last 12 months, in-store and online, NI and RoI, August 2015

Irish consumers are more likely to return in-store purchases

Figure 6: Consumers who have returned clothing that they have bought in the last 12 months, in-store and online, NI and RoI, August 2015
Figure 7: Reasons why consumers returned clothing they bought from an in-store outlet in the last 12 months, NI and RoI, August 2015
Figure 8: Reasons why consumers returned clothing they bought online in the last 12 months, NI and RoI, August 2015

Street fashion has the most influence over Irish consumers

Figure 9: Factors (other than cost and personal preferences) that influence how consumers dress, NI and RoI, August 2015

What we think

Issues and Insights

Who are the key retailers operating in the NI and RoI clothing market?
The facts
The implications
How is online shopping faring in IoI?
The facts
The implications
What impact have changes in the cost of clothing had on the Irish clothing retail market?

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: 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 |
EMAIL: reports@mintel.com

Clothing Retailing - Ireland - October 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

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

The facts
The implications
What is the consumer satisfaction with clothes purchased?
The facts
The implications
What impacts how consumers dress?
The facts
The implications

Market Overview

Key points
Clothes prices drop in RoI
Figure 10: Consumer price index, all items vs clothing and footwear, RoI, January 2012-June 2015
Figure 11: Consumer price index, all goods vs clothing and footwear, NI, January 2012-June 2015
Poor summer weather makes trading bleak
Irish consumer financial health continues its uphill trend
Figure 12: How consumers rate their current financial situation, NI and RoI, October 2014 and September 2015
Almost a third shop online using smartphones
Figure 13: Consumers who have bought clothing, footwear and accessories online in the last 12 months, by device, NI and RoI, December 2014
Figure 14: Usage of devices to shop online in the last 12 months, by gender, NI, December 2014
Figure 15: Usage of devices to shop online in the last 12 months, by gender, RoI, December 2014
Smartphone and tablet device clothes searches on the rise
Clothes swapping takes away from clothes shopping
Visa spending is up in 2015
Figure 16: RoI Visa card spending, by face-to-face and online spending, June-August 2015

Market Size and Forecast

Key points
Clothing retail sector set for growth in 2015
Figure 17: Estimated market value of Irish clothing retailing market, IoI, RoI and NI, 2010-20
Figure 18: Estimated market value index of Irish clothing retailing market, RoI and NI, 2010-20
High street retailers see a 3.5% increase in 2014
Figure 19: Estimated market value of Irish clothing retailing market, by sector, IoI, 2011-14
"Black Friday" opens up opportunities for clothing retailers and supermarkets
Womenswear remains the top sector
Figure 20: Estimated market value of Irish clothing retailing market, by sector, IoI, 2011-15
Over €400 million spent on clothing online
Figure 21: Estimated market value of online spending on clothing, IoI, by gender, 2014 and 2015

Strengths and Weaknesses

Strengths

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: 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 |
EMAIL: reports@mintel.com

Clothing Retailing - Ireland - October 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

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

Weaknesses

Who's Innovating?

Key points

École Mobile First Programme to simplify the clothing purchasing process

Miss Selfridge has added a one-click option to its online shopping app

Down the chute!

Company Profiles

Arcadia Group

Key facts

Recent developments

Asda

Key facts

Recent developments

ASOS

Key facts

Recent developments

Benetton Group

Key facts

Recent developments

Debenhams

Key facts

Recent developments

Dunnes Stores

Key facts

Recent developments

H&M

Key facts

Recent developments

Inditex Group

Key facts

Recent developments

M&S

Key facts

Recent developments

Next

Key facts

Recent developments

Primark/Penneys

Key facts

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Clothing Retailing - Ireland - October 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

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

Recent developments

Tesco

Key facts

Recent developments

River Island

Key facts

Recent developments

Monsoon

Key facts

Recent developments

Matalan

Key facts

Recent developments

TK Maxx

Key facts

Recent developments

Amazon

Key facts

Recent developments

eBay

Key facts

Recent developments

The Consumer – Usage of Clothing Retailers

Key points

Value retailers prove most popular for in-store shopping

Figure 22: Retailers shopped in for clothes in the last 12 months, in-store and online, NI and RoI, August 2015

Penneys shopped in by three in four RoI and half of NI consumers

Figure 23: Consumers who have bought clothes in Penneys/Primark in the last 12 months, in-store, by gender and age, NI and RoI, August 2015

Figure 24: Consumers who have bought clothes in Penneys/Primark in the last 12 months, in-store, by age of children, NI and RoI, August 2015

Tesco continues to be the top supermarket for clothes

Figure 25: Retailers shopped in for clothes in the last 12 months, in-store and online, NI and RoI, August 2015

Figure 26: Consumers who have bought clothes in Tesco in the last 12 months, in-store, by gender, NI and RoI, August 2015

Next and M&S show strong traction amongst mature and affluent Irish consumers

Figure 27: Consumers who have bought clothes in Next or M&S in the last 12 months, in-store or online, NI and RoI, August 2015

Figure 28: Consumers who have bought clothes in Next or M&S in the last 12 months, in-store, by gender and social class, NI and RoI, August 2015

The fast fashion consumption era

Dunnes more popular in RoI

Figure 29: Consumers who have bought clothes in department stores in the last 12 months, in-store, by retailer, NI and RoI, August 2015

Online-only retailers appeal most to men

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Clothing Retailing - Ireland - October 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

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

Figure 30: Consumers who have bought clothes from Amazon, eBay and ASOS in the last 12 months, by gender and age, NI and RoI, August 2015

The Consumer – Clothing Returns

Key points

Irish consumers are more likely to return in-store purchases

Figure 31: Consumers who have returned clothing that they have bought in the last 12 months, in-store and online, NI and RoI, August 2015

Wrong size is the most popular reason for in-store returns

Figure 32: Reasons why consumers returned clothing they bought from an in-store outlet in the last 12 months, NI and RoI, August 2015

Men return more clothes for being the wrong size

Women more likely to think clothes do not suit them

Figure 33: Consumers who have returned clothing they bought in-store in the last 12 months because the garments did not suit them, by gender, NI and RoI, August 2015

Poor fit is the key reason for online returns

Figure 34: Reasons why consumers returned clothing they bought online in the last 12 months, NI and RoI, August 2015

Women more likely to blame poor fit

Figure 35: Consumers who returned clothing they bought online in the last 12 months because of poor fit, by gender and age, NI and RoI, August 2015

The Consumer – Factors that Influence How Consumers Dress

Key points

Street fashion has the most influence over Irish consumers

Figure 36: Factors (other than cost and personal preferences) that influence how consumers dress, NI and RoI, August 2015

Street fashion most influential among younger consumers

Figure 37: Consumers who state that street fashion (what people are wearing) influences how they dress, by gender and age, NI and RoI, August 2015

Friends influence a fifth of Irish consumers

In-store style advice influences women

Figure 38: Consumers who state that style advice or outfits on retailer's website or in-store influence how they dress, by gender, NI and RoI, August 2015

Mature males state nothing influences how they dress

Figure 39: Consumers who state that nothing influences how they dress, by gender and age, NI and RoI, August 2015

Appendix

NI Toluna data

Figure 40: Retailers that consumers have bought clothes from in-store in the last 12 months, by demographics, NI, August 2015

Figure 41: Retailers that consumers have bought clothes from in-store in the last 12 months, by demographics, NI, August 2015

(continued)

Figure 42: Retailers that consumers have bought clothes from in-store in the last 12 months, by demographics, NI, August 2015

(continued)

Figure 43: Retailers that consumers have bought clothes from in-store in the last 12 months, by demographics, NI, August 2015

(continued)

Figure 44: Retailers that consumers have bought clothes from in-store in the last 12 months, by demographics, NI, August 2015

(continued)

Figure 45: Retailers that consumers have bought clothes from online in the last 12 months, by demographics, NI, August 2015

(continued)

Figure 46: Retailers that consumers have bought clothes from online in the last 12 months, by demographics, NI, August 2015

(continued)

Figure 47: Retailers that consumers have bought clothes from online in the last 12 months, by demographics, NI, August 2015

(continued)

Figure 48: Retailers that consumers have bought clothes from online in the last 12 months, by demographics, NI, August 2015

(continued)

Figure 49: Retailers that consumers have bought clothes from online in the last 12 months, by demographics, NI, August 2015

(continued)

Figure 50: If consumers have returned clothing that they have bought in-store in the last 12 months, by demographics, NI, August 2015

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Clothing Retailing - Ireland - October 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

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

Figure 51: If consumers have returned clothing that they have bought online in the last 12 months, by demographics, NI, August 2015

Figure 52: Reasons why consumers returned clothing they bought from an in-store outlet in the last 12 months, by demographics, NI, August 2015

Figure 53: Reasons why consumers returned clothing they bought from an in-store outlet in the last 12 months, by demographics, NI, August 2015 (continued)

Figure 54: Reasons why consumers returned clothing they bought from an online outlet in the last 12 months, by demographics, NI, August 2015

Figure 55: Reasons why consumers returned clothing they bought from an online outlet in the last 12 months, by demographics, NI, August 2015 (continued)

Figure 56: Factors (other than cost and personal preferences) that influence how consumers dress, by demographics, NI, August 2015

Figure 57: Factors (other than cost and personal preferences) that influence how consumers dress, by demographics, NI, August 2015 (continued)

Figure 58: Factors (other than cost and personal preferences) that influence how consumers dress, by demographics, NI, August 2015 (continued)

RoI Toluna data

Figure 59: Retailers that consumers have bought clothes from in-store in the last 12 months, by demographics, RoI , August 2015

Figure 60: Retailers that consumers have bought clothes from in-store in the last 12 months, by demographics, RoI, August 2015 (continued)

Figure 61: Retailers that consumers have bought clothes from in-store in the last 12 months, by demographics, RoI, August 2015 (continued)

Figure 62: Retailers that consumers have bought clothes from in-store in the last 12 months, by demographics, RoI , August 2015 (continued)

Figure 63: Retailers that consumers have bought clothes from online in the last 12 months, by demographics, RoI, August 2015 (continued)

Figure 64: Retailers that consumers have bought clothes from online in the last 12 months, by demographics, RoI , August 2015

Figure 65: Retailers that consumers have bought clothes from online in the last 12 months, by demographics, RoI , August 2015 (continued)

Figure 66: Retailers that consumers have bought clothes from online in the last 12 months, by demographics, RoI, August 2015 (continued)

Figure 67: Retailers that consumers have bought clothes from online in the last 12 months, by demographics, RoI, August 2015 (continued)

Figure 68: If consumers have returned clothing that they have bought in-store in the last 12 months, by demographics, RoI, August 2015

Figure 69: If consumers have returned clothing that they have bought online in the last 12 months, by demographics, RoI, August 2015

Figure 70: Reasons why consumers returned clothing they bought from an in-store outlet in the last 12 months, by demographics, RoI, August 2015

Figure 71: Reasons why consumers returned clothing they bought from an in-store outlet in the last 12 months, by demographics, RoI, August 2015 (continued)

Figure 72: Reasons why consumers returned clothing they bought from an online outlet in the last 12 months, by demographics, RoI, August 2015

Figure 73: Reasons why consumers returned clothing they bought from an online outlet in the last 12 months, by demographics, RoI, August 2015 (continued)

Figure 74: Factors (other than cost and personal preferences) that influence how consumers dress, by demographics, RoI, August 2015

Figure 75: Factors (other than cost and personal preferences) that influence how consumers dress, by demographics, RoI, August 2015 (continued)

Figure 76: Factors (other than cost and personal preferences) that influence how consumers dress, by demographics, RoI, August 2015 (continued)

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com