

Designer/Upmarket Clothing - UK - March 2010

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What is this report about?

The UK clothing market is dominated by the mid-market retailers, with the designer and upmarket clothing sector being very small – as confirmed by the consumer research for this report showing that only around one in five people buy some designer clothing, though nearly two in five buy some upmarket high street clothing.

While the designer/ upmarket sector has been relatively insulated from the effects of the recession, there is evidence of expenditure cutbacks – in 2007 by men, in 2008 by both men and women, but in 2009 mostly by women, with menswear being more buoyant. The key area impacted has been basics.

The outlook for the designer and upmarket high street sector looks positive. The big picture of UK demographics shows increasing numbers of affluent ABs, and research among buyers of these types of clothing shows they are much more likely to be intending to spend more money on clothing this year than last year.

What have we found out?

- The premium clothing sector has been less impacted by the recession than the market as a whole. But the more 'basic' area of designer/upmarket high street clothing – everyday items – has been more impacted where consumers are happy to mix and match with mid-market items.
- The designer wear market has substantial scope to encourage trading up from upmarket high street clothing: only one in five people buy some designer clothing whereas almost two in five buy some upmarket high street clothing.
- Demonstrating a level of devotion rarely seen in any other clothing sector, more than one in ten buyers say they have made sacrifices in other areas of spend, such as holidays, so they can afford designer clothes.
- Counter-intuitively, men are twice as likely as women to buy both designer clothing. whereas women are keener mid-market shoppers justifying purchases on the basis of physical qualities such as style, cut, fabric and quality.
- Collaborations between designers, celebrities and high street retailers are now well established. But few collaborations include much, if any, menswear: an opportunity going forward as men are greater designer buyers than women.
- Designer clothing – and to a slightly lesser extent upmarket high street clothing – may be fairly insulated from issues with the wider economy. Buyers are a small niche group and the market continues to be buoyed by international travellers.

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