

## Womenswear - UK - May 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

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



"While women continue to prioritise buying new clothes over other areas of spend, with the womenswear market rising, sales slowed compared with the previous year due to high levels of discounting."

- Tamara Sender, Senior Fashion Analyst

This report looks at the following areas:

- How has the womenswear market performed and what is the forecast for the sector?
- How can retailers cater to older women?
- How can retailers use technology to improve the shopping experience?

While females aged 16-24 remain the most active clothes buyers, an ageing female population who are increasingly buying more clothes online will mean that older women will exert more influence on the market in the coming years. Retailers will need to focus even more on fit and ensuring that their clothing collections flatter and fit more mature and larger sizes and body shapes.

In order to stay ahead of the game, retailers will need to experiment more with the latest technology such as smart fitting rooms and e-sizing technology to improve the shopping experience.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto: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

# Womenswear - UK - May 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

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

## Table of Contents

### Overview

What you need to know  
Products covered in this report

### Executive Summary

Womenswear sales slow  
Figure 1: Best- and worst-case forecast of UK sales of women's outerwear, 2009-19

M&S maintains trustworthy image, built on customer service  
Figure 2: Attitudes towards and usage of selected brands, November 2014 and January 2015

One in seven women wear plus sizes  
Figure 3: Women's UK clothing size/waist sizes, January 2015

Primark leads, but loses popularity among young  
Figure 4: Retailers from which women bought clothing for themselves in the last 12 months, split by in-store and online, January 2015

Women cut back  
Figure 5: Changes in shopping behaviour for number of items of clothing bought and amount spent in the last 12 months, January 2015

Discounting hits womenswear hard  
Figure 6: Female shopping behaviour when buying clothes in-store or online, January 2015

Smart fitting rooms could reduce returns  
Figure 7: Women's attitudes towards innovations when shopping for clothes in-store and online, January 2015

### Issues and Insights

How has the womenswear market performed and what is the forecast for the sector?  
The facts  
The implications  
How can retailers cater to older women?  
The facts  
The implications  
How can retailers use technology to improve the shopping experience?  
The facts  
The implications

### The Market – What You Need to Know

Womenswear grows by 4% in 2014  
Menswear outpaces womenswear  
Sector will reach £32 billion by 2019  
Women remain cautious about their spending  
Decline in young women to impact market  
Ageing population presents an opportunity  
High rates of obesity lead to rising demand for larger clothes

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Womenswear - UK - May 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

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

## Market Size and Forecast

Figure 8: UK sales of women's outerwear at current prices, 2009-19

Figure 9: Best- and worst-case forecast of UK sales of women's outerwear, 2009-19

## Market Drivers

### Ageing female population

Figure 10: Trends in the age structure of the UK female population, 2009-19

### Female employment set to rise

Figure 11: Female employment and unemployment, 2009-19

### Obesity

Figure 12: Proportion of overweight and obese female population, 2008-13

### Women are less confident about their finances than men

Figure 13: How respondents describe their financial situation, by gender, March 2015

Figure 14: Current financial situation compared with a year ago, by gender, March 2015

### Women cutting back on clothes purchases

Figure 15: Activities women have done in the last three months, March 2014 and 2015

### Technology

Figure 16: Personal ownership of consumer technology products, by gender, November 2014

Figure 17: Personal ownership of consumer technology products, by gender, November 2014

## Key Players – What You Need to Know

Retailers focus on new store concepts

Personalised websites

Retailers cut back on adspend

M&S associated with good customer service

Next has strong all-round brand image

White Stuff benefits from positive customer reviews

## Innovations

In-store technology

Virtual shopping experience

Figure 18: Karen Millen's 'Shop Knightsbridge' online platform

New fashion brand targeting mums

Contemporary concept

Figure 19: A contemporary feel for Jigsaw's new Milton Keynes store, designed by GP Studio

Online personalisation

Marketing to create a hype

## Space Allocation Summary

Formal/casual split

Figure 20: Retailers of womenswear: formal/casual space allocation, October 2014

Space allocations: Detailed estimates

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Womenswear - UK - May 2015

**Report Price:** £1750.00 | \$2834.04 | €2223.04

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

Figure 21: Broad range clothing retailers, detailed space allocations for womenswear, October 2014

Figure 22: Broad range clothing retailers and supermarket chains, detailed space allocations for womenswear, October 2014

Figure 23: Womenswear specialists, retailers' space allocation estimates, October 2014

### Estimated sales breakdown

Figure 24: Leading clothing retailers' estimated sales, by product, 2014

### Sales densities

Figure 25: Leading clothing retailers' estimated sales densities, by product, 2014

### Market shares

Figure 26: Leading clothing retailers' estimated market shares for womenswear, 2014

## Brand Research

### What you need to know

#### Brand map

Figure 27: Attitudes towards and usage of selected brands, November 2014 and January 2015

#### Key brand metrics

Figure 28: Key metrics for selected brands, November 2014 and January 2015

#### Brand attitudes: Primark predominantly noted for value

Figure 29: Attitudes, by brand, November 2014 and January 2015

#### Brand personality: Ted Baker seen as most exclusive

Figure 30: Brand personality – Macro image, November 2014 and January 2015

#### Marks & Spencer noted for customer service traits

Figure 31: Brand personality – Micro image, November 2014 and January 2015

### Brand analysis

#### Zara offers more accessible higher-end proposition

Figure 32: User profile of Zara, January 2015

#### Ted Baker is seen as most exclusive, limiting overall usage

Figure 33: User profile of Ted Baker, January 2015

#### Marks & Spencer maintains trustworthy image, built on customer service

Figure 34: User profile of Marks & Spencer, November 2014

#### Next has all-round brand image that appeals to wide range of women

Figure 35: User profile of Next, January 2015

#### Primark has value image, but 25-34s likely to note a stylish element as well

Figure 36: User profile of Primark, January 2015

#### New Look has limited target group, but has strong positive image among them

Figure 37: User profile of New Look, January 2015

#### White Stuff has potential for growth

Figure 38: User profile of White Stuff, January 2015

#### Fat Face has a similar image to White Stuff but lacks same satisfaction and recommendation

Figure 39: User profile of Fat Face, January 2015

#### Debenhams has trustworthy image but lacks the same customer service image as M&S

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Womenswear - UK - May 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Figure 40: User profile of Debenhams, November 2014

Topshop/Topman's overall image suffers from youthful targeting

Figure 41: User profile of Topshop/Topman, January 2015

### Brand Communication and Promotion

Advertising spend declines in 2014

Figure 42: Main monitored advertising expenditure on womenswear, 2011-14

Press is the main form of advertising

Figure 43: Main monitored advertising expenditure on womenswear, by media type, 2014

M&S doubles adspend on womenswear

Figure 44: Main monitored advertising expenditure on womenswear, by advertiser, 2011-14

### The Consumer – What You Need to Know

Driving purchases of fashion accessories alongside clothing

Plus-size sector remains underserved

Older women more likely to wear larger sizes

Primark leads, but young shopping more online

Increase in over-55s buying clothes online

Women cut back on clothes purchases in last year

Increase in discounting impacts womenswear

33% of women return clothes bought online

Smart fitting rooms could reduce in-store returns

Latest technology can help draw young into stores

### What Fashion Items Women Buy

Figure 45: Spending habits for clothing, footwear and accessories, by gender, March 2015

### Female Clothes Sizes

One in seven women wear plus sizes

Figure 46: Women's UK clothing size/waist sizes, January 2015

Older women wear bigger clothes sizes

Figure 47: Profile of women who wear clothes in plus sizes, by age, January 2015

### Where Do Women Buy Clothes?

Primark leads, but loses popularity among young

Figure 48: Retailers from which women bought clothing for themselves in the last 12 months, split by in-store and online, January 2015

Women aged 55+ shopping more online

Figure 49: Women who have purchased clothes online in the last 12 months, by age, December 2013 and January 2015

Young fashion retailers need to convince shoppers to visit stores

Figure 50: Women who have bought clothing for themselves in the last 12 months from Primark, Next, Topshop, New Look, H&M and other mid-market high street retailers, in-store, by age, January 2015

Under-35s shop at five or more retailers

Figure 51: Repertoire of in-store retailers from which women have bought clothes in the last 12 months, January 2015

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Womenswear - UK - May 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

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

## Changes in Purchasing Behaviour

### Women cut back

Figure 52: Changes in shopping behaviour for number of items of clothing bought and amount spent in the last 12 months, January 2015

### Young women spend more on clothes

Figure 53: Changes in shopping behaviour for amount spent in the last 12 months, by age, January 2015

## Shopping Behaviour

### Discounting hits womenswear hard

Figure 54: Female shopping behaviour when buying clothes in-store or online, January 2015

### Catering to older women

Figure 55: Female shopping behaviour when buying clothes in-store or online, by age, January 2015

### A third of women return clothes bought online

Figure 56: Profile of women who have returned clothes bought in-store and bought online, by age, January 2015

## Consumer Attitudes towards Innovations

### Smart fitting rooms could reduce returns

Figure 57: Women's attitudes towards innovations when shopping for clothes in-store and online, January 2015

### Young want to use mobile devices to shop in-store

Figure 58: Women's attitudes towards innovations when shopping for clothes in-store and online, by age, January 2015

## Data Sources and Abbreviations

### Data sources

### Fan chart forecast

### Abbreviations

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)