

Clothing Retailing: Inc Impact of COVID-19 - Europe - October 2020

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“Clothing, footwear and accessories is among the sectors being hit the hardest by the ongoing COVID-19 pandemic across Europe, and we expect the leading five economies to experience drops in retail specialists’ sales of between 20% and 32% in 2020.”

– **Armando Falcao, European Retail Analyst**

This report looks at the following areas:

- The impact of COVID-19 on the clothing retail sector
- How behaviours of clothes shoppers have changed since the start of the COVID-19 outbreak
- The main channels used to purchase clothes and how this is evolving
- How specialists are performing compared to non-specialists
- The role of online and the emergence of online-only specialists.

Specialist retailers continue to lose share of spending in the category due to strong competition from online pureplayers and other non-specialists. However, we continue to see changes in consumer behaviour due to the pandemic, creating opportunities for retailers to establish a stronger online presence to capitalise on the substantial rise in online demand.

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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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The market

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Gradual recovery

Specialists see deepest declines

Consumer confidence remains volatile

Market Size and Forecast

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Figure 168: Short, medium and long-term impact of COVID-19 on clothing, 3 November 2020

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ASOS stands out as the most trusted pureplay

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Next remains leading specialist but Primark surpasses M&S

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Figure 212: Christopher Kane free face masks, 2020

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Matalan new brand positioning campaign

Freemans' new website, app and exclusive clothing collection

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M&S loses trust, while Next and Primark seen as innovative

Supermarket clothing brands seen as offering good value

ASOS stands out as the most trusted pureplay

Gap seen as overrated

The Consumer – Key Takeaways

People are spending less on fashion

Younger generations favour buying online, but also visit stores

Amazon competes for lead with M&S

New clothes and fashion trends become less of a priority

Value for money dominates

Impact of COVID-19 on Consumer Behaviour

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People are spending less on fashion...

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Figure 229: Changing priorities since COVID-19, 10-17 September 2020

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Figure 230: Face masks and scrunchies, September 2020

Figure 231: Agreement with usage of face masks/coverings in different situations, 10-17 September 2020

What They Buy

Appetite for fashion falls

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Surge in sportswear purchasing

Figure 233: Outerwear items purchased in the last three months, June 2019-September 2020

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Figure 240: Retailers used to purchase clothing in the last 12 months, net of retailers used to purchase in-store and/or online, August 2020

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Figure 248: Changes in clothes shopping behaviour since COVID-19, by generation, August 2020

Most Important Factors when Buying Clothes

Value for money dominates

Figure 249: Most important factors when choosing which clothes to buy, August 2020

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Abbreviations

Consumer research methodology

Appendix – Market/Sector Size and Forecast

Forecast methodology

Arcadia

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Arcadia closes more stores and plans restructure post-COVID-19...

...Westfield Stratford is to close after lease expires...

...but Topshop on Oxford Street to remain open after £310 million refinancing

Arcadia furloughs 14,500 staff and execs face 50% pay cuts

Snapchat teams up with adidas and Topshop in new ecommerce initiative

Company background

Company performance

Figure 258: Arcadia Group: Group financial performance, 2014/15-2018/2019

Figure 259: Arcadia: Outlet data, 2014/15-2018/19

Retail offering

C&A

What we think

New store concept to tempt customers through the door

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New concession format to replace no longer sustainable standalone stores

A leader in fashion sustainability

Company background

Company performance

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Figure 261: C&A: Estimated outlet data, 2015/16-2019/20

Retail offering

H&M Hennes & Mauritz

What we think

New hyper-local store concept

Custom-made perfect fit jeans

Online expansion giving more customers more options to access its brands

Livestreaming shopping events

Fashion rental and re-sale point towards an increased focus on sustainability

Company background

Company performance

Figure 262: H&M Hennes & Mauritz: Group financial performance, 2014/15-2018/19

Figure 263: H&M Hennes & Mauritz: Outlet data, 2014/15-2018/19

Retail offering

Grupo Inditex

What we think

A global business

Upsizing stores

Online a big opportunity for growth

Technology at the heart of the business

Flexible and responsive approach to production helped it cope with COVID

Sustainability is key to future

Where now?

Company background

Company performance

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Figure 265: Grupo Inditex: Sales by brand, 2019/20

Figure 266: Grupo Inditex: Outlet data, 2015/16-2019/20

Figure 267: Grupo Inditex: Outlet numbers by brand, 2019/20

Retail offering

Marks & Spencer

What we think

Clothing delivered with groceries

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Drive-through fashion service

Online instalment payment option to help spread the cost of buying fashion

Wider choice of brands to broaden customer appeal

Shifting focus away from formalwear range to contemporary everyday fashions

Eradicates alpaca wool from products

Company background

Company performance

Figure 268: Marks & Spencer: Group financial performance, 2015/16-2019/20

Figure 269: Marks & Spencer: Outlet data, 2015/16-2019/20

Retail offering

Next Group

What we think

Location of stores has been key

Greater shift towards online

Product mix benefited from bias to sports and loungewear

Growing focus on beauty

Next ups its ante on underwear

Where next

Company background

Company performance

Figure 270: Next Group: Group financial performance, 2014/15-2019/20

Figure 271: Next Group: Outlet data, 2014/15-2019/20

Retail offering

Primark/Penneys

What we think

Missing out on online sales costs the brand millions in lost revenue

A must-visit destination for consumers shopping for clothes in-store

Cut-price fashion

New eco-conscious fashion, homeware and beauty collection

First ever sportswear collaboration

Company background

Company performance

Figure 272: Primark/Penneys: Group financial performance, 2015/16-2019/20

Figure 273: Primark/Penneys: Outlet data, 2015/16-2019/20

Retail offering

River Island

What we think

'Buy now, pay later' online option

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Needs to do more to get customers back through the door

Commits to being more transparent

Exclusive childrenswear collaboration with TV star and personality Samantha Faiers

Own-brand beauty offering

Company background

Company performance

Figure 274: River Island Holdings Limited: Group financial performance, 2015-19

Figure 275: River Island Holdings Limited: Outlet data, 2015-19

Retail offering

TJX International (TK Maxx Europe)

What we think

Turbocharging the in-store experience to better compete with online

Discounted brands and designer labels to tempt value-conscious fashionistas

Tapping into the flourishing Russian off-price retail market

A sustainable business model of sorts

Company background

Company performance

Figure 276: TJX International (TK Maxx Europe): Group financial performance, 2015/16-2019/20

Figure 277: TJX International (TK Maxx Europe): Outlet data, 2015/16-2019/20

Retail offering

Zalando

What we think

Taking the guesswork out of size and fit

Customers can now tailor their experience by following their favourite brands

Boosting sustainability credentials with eco-friendly offering and second-hand platform

Expanding luxury ranges to meet demand among younger consumers

Company background

Company performance

Figure 278: Zalando: Group financial performance, 2015-19

Figure 279: Zalando: key metrics, 2017-H1 2020

Retail offering

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