

Report Price: £3695 | \$4995 | €4400

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

This report looks at the following areas:

- The impact of COVID-19 on online apparel retailing.
- The desire and urgency for sustainable clothing purchase options.
- Importance of the omnichannel experience to the online shopping marketplace.
- Social media's increasing role in inspiration and commerce.



"The convenience and overall enjoyable experience will keep consumers shopping for clothes online. Brands and retailers will need to emphasize their elevated experience which should include digital tools for virtual try on, sustainability initiatives, social commerce and omnichannel capabilities."

Katie Hansen, Retail & eCommerce Analyst

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	s +1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

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
- Key issues covered in this Report
- Definition
- Market context
- Economic and other assumptions
- COVID-19: US context

EXECUTIVE SUMMARY

- Top takeaways
- Market overview

Figure 1: Total US sales and fan chart forecast of clothing, footwear and accessories, at current prices, 2016-26

Impact of COVID-19 on online apparel retailing
 Figure 2: Short-, medium- and long-term impact of COVID-19 on online apparel, 2021

- Opportunities and challenges
- Incorporate circular shopping options online
- Evolve purpose of physical footprint to cater to online shopping
- Leverage social media to spark inspiration and drive purchases

THE MARKET - KEY TAKEAWAYS

- Slower growth in 2021, elevated levels remain compared to pre-pandemic
- · Consumers get comfy with casual fashion
- Sustainability is a bigger priority for shoppers

MARKET SIZE AND FORECAST

Shopping for clothing is a hybrid model

Figure 3: Total US sales and fan chart forecast of clothing, footwear and accessories, at current prices, 2016-26
Figure 4: Impact of COVID-19 on category sales, 2016-21

Impact of COVID-19 on online apparel retailing

MARKET FACTORS

Consumers are ready to spend but surging prices limit their options

Figure 5: Disposable Personal Income change from previous period, 2010-21

Comfort and style become synonymous

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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

Report Price: £3695 | \$4995 | €4400

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



Figure 6: Stitch Fix back to life, 2021

Online apparel receives an assist from tech

Figure 7: Snapchat improving virtual try-on features, 2021

- Tug-of-war amidst privacy and sharing
- · Circular shopping and sustainability are hot, hot, hot

Figure 8: Fabletics x ThredUp partnership, 2021

Figure 9: Adidas sustainability efforts, 2021

COMPANIES AND BRANDS - KEY TAKEAWAYS

- Lord & Damp; Taylor emerges from the retail ashes as an online only option
- · Walmart eyes the future of fashion with virtual fitting rooms
- Fashion, gaming catch fire
- NFTs open (digital) doors of opportunity

COMPETITIVE STRATEGIES

 Etsy buys Depop as circular retail takes off Figure 10: Etsy buys Depop, 2021

Lord & Taylor emerges as online-only retailer

Figure 11: Lord & Taylor online only re-emergence, 2021

Walmart invests in ecommerce with virtual fitting room

Figure 12: Walmart & Zeekit, 2021

Reformation launches traceable denim

Figure 13: Reformation FibreTrace, 2021

MARKET OPPORTUNITIES

Streamline the shopping process through social commerce
 Figure 14: Anthropologie Pinterest catalog, 2021

Leverage increasing popularity of livestream shopping events

Figure 15: Walmart, Gap Home livestream event, 2021

Fashion_Brand joins the game

Figure 16: Balenciaga Afterworld: The Age of Tomorrow, 2020

· Explore the new frontier of digital ownership

Figure 17: NBA Top Shot NFT, 2021

Figure 18: RTFKT & Fewocious NFT collaboration, 2021

THE CONSUMER - KEY TAKEAWAYS

- The in-store experience can still drive online shopping
- · Convenience, enjoyment keep consumers shopping online
- Shoppers use social for inspiration and idea saving
- Consumers need more details to feel confident with purchase decisions

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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

Report Price: £3695 | \$4995 | €4400

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



 Pique consideration and purchase through the browsing process

RETAILERS SHOPPED

- Purchasing clothing is, overall, a blended experience
 Figure 19: Retailers shopped Online and offline, 2021
- Amazon leads with value in online shopping
 Figure 20: Amazon and Walmart focus on fashion, 2021
- Discount retailers have work ahead of them to capture online audiences
 - Figure 21: T.J.Maxx Find of the Week, 2021
- Offering convenience for both genders; emphasizing discovery for women
 - Figure 22: Retailers shopped online, by gender, 2021
- Each generation affiliates with its own favorite retailer(s)
 Figure 23: Retailers shopped online, by generation, 2021
- Hispanic consumers gravitate toward familiar options
 Figure 24: Retailers shopped online, by Hispanic ethnicity,
 2021

ITEMS PURCHASED AND ITEM RECIPIENTS

- Consumers desire casual fashion
 - Figure 25: Items purchased, 2021
- Generations' trust in the online process influences what they purchase
 - Figure 26: Items purchased, by generation, 2021
- Consumers shop for online for themselves, as well as for others
 - Figure 27: Item recipients, by gender and age, 2021
- Parents focus on their children's wardrobes
 - Figure 28: J.Crew Factory highlights mini-me clothing options, 2021
 - Figure 29: Target; Moncia & Andy connect with parents beyond the clothing, 2021
 - Figure 30: Item recipients, by parental status and gender, 2021

MOTIVATIONS FOR SHOPPING FOR CLOTHING ONLINE

- Consumers enjoy the online apparel journey Figure 31: Reasons for online purchase, 2021
- Offer female shoppers an experience and time to decide Figure 32: Reasons for online purchase, by gender, 2021
- Hispanic consumers use ecommerce as a budgetary tool

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	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

Report Price: £3695 | \$4995 | €4400

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



Figure 33: Reasons for online purchase, by Hispanic ethnicity, 2021

Factors driving online shopping vary by generation
 Figure 34: Reasons for online purchase, by generation, 2021

THE ROLE OF SOCIAL MEDIA

Using social media for inspiration, lucrative rewards
 Figure 35: Actions on social media, 2021

Incorporating social as a valuable shopping tool

Figure 36: Madewell promotes new product line via instagram, 2021

Figure 37: Frequent actions on social media, by generation, 2021

Consumers use social as their digital sticky notes

Figure 38: Social media behaviors, 2021

• Partnering with parents, kids to deliver a better experience Figure 39: Social media behaviors, by parental status, 2021

BEHAVIORS ONLINE

Providing a baseline for sizing between brands

Figure 40: Behaviors when shopping for clothing online – Shopping approach, 2021

 Evolve return policies and processes to align with consumers' shopping behaviors

Figure 41: Behaviors when shopping for clothing online - Returns, 2021

Tools and services can elevate online shopping experience

Figure 42: Behaviors when shopping for clothing online – Tools and features, 2021

Figure 43: AE x Snapchat partnership, 2021

· Potential to drive online behaviors in the future

Figure 44: Actions done or considered when apparel shopping online, 2021

Using digital tools to connect with each generation

Figure 45: Actions done or considered when apparel shopping online, by generation, 2021

SHOPPING INFLUENCES AND PRODUCT DISCOVERY

Bringing the in-person experience home

Figure 46: Nike's SNKRS app exclusively for new releases, 2021 Figure 47: Influential factors, 2021

 Connecting with Millennials over convenience; serving savings to Gen Z

Figure 48: Influential factors, by generation, 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	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

Report Price: £3695 | \$4995 | €4400

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



Figure 49: Olive offers cardboard-free deliveries via sustainable shipper, 2021

Creating connections, communities for multicultural consumers

Figure 50: Influential factors, by race and Hispanic ethnicity, 2021

Trust, ads, and social all included in discovery process
 Figure 51: Avenues of discovery, by gender, 2021

ATTITUDES TOWARD SHOPPING FOR APPAREL ONLINE

 Consumers browse freely, utilize the store, seek out brand communities

Figure 52: Attitudes about apparel online, by gender, 2021 Figure 53: Hatch events, 2021

Elevating Gen Z's expectations; being a partner for parents
 Figure 54: Attitudes about apparel online, by generation,
 2021

Providing more consistency with details, omni-options
 Figure 55: Attitudes toward buying apparel online, 2021

 Putting Gen Z in the driver's seat
 Figure 56: Attitudes toward buying apparel online, by generation, 2021

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Forecast
- Consumer survey data
- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX - THE MARKET

Figure 57: Total US retail sales and forecast of online apparel, footwear, and accessories at current prices, 2016-26

APPENDIX - THE CONSUMER

Figure 58: Item recipients, by race/ethnicity, 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	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



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.