Menswear - UK - March 2021

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This report looks at the following areas:

- **The impact of COVID-19 and the third national lockdown on the menswear market.**
- **What channels men use to shop for clothes for themselves and what types of retailers they buy from.**
- **How men's shopping behaviour has changed since COVID-19.**
- **Changes in men's priorities when buying clothes compared with 12 months ago.**
- **Men's views on inclusivity and diversity in fashion.**

Despite a big jump in men purchasing clothes online in the last 12 months to 78%, there has only been a slight rise in men buying clothes via their smartphones (+2 percentage points) to 28% in 2020 compared with 26% in 2019. This contrasts with a bigger increase in smartphone purchasing of clothes among women (35%) and the overall trend for rising smartphone ownership (80%) and purchasing online via this device (62%) among men.

The menswear market has been badly impacted by the COVID-19 outbreak, leading to a 29% decline in consumer spending on men's clothing to £10.9 billion in 2020, down from £15.4 billion in 2019. Although the January 2021 lockdown will slow the recovery of the market, the long-term prospects are that the market will return to growth by the second half of the year and new purchases will be driven by pent-up demand as men begin to socialise again and go on holiday as part of the government's four-step roadmap out of the lockdown announced on 22 February 2021.

The trend for casualisation of workwear is set to continue, with 66% of male clothes shoppers either having bought or planning to buy casual clothes for work. The changes in working habits set in motion during the pandemic will have long-term implications, as around half of consumers plan to work from home more or the same compared with before the COVID-19 outbreak. This poses a major threat to menswear specialists, in particular those specialising in

"The menswear market has been hard hit by the COVID-19 outbreak as it has removed the main drivers for purchasing new clothes. Menswear specialists, in particular those specialising in formalwear, have suffered the most as men embrace more casual outfits. The long-term prospects are that the menswear market will return to growth by the second half of 2021."

– Tamara Sender Ceron, Senior Fashion Analyst

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formalwear and suiting. The pandemic accelerated the demise of major specialist retailers including TM Lewin and Moss Bros and their rivals are having to evolve their offer in order to survive, expanding their ranges and adapting them so that they look smart but are easier and more comfortable to wear at home.

The forecast 5.4% increase in men aged 35-44 to 4.5 million by 2025 provides a big opportunity for menswear retailers as they are more likely than average to have spent £50 or more on their last shopping trip. Men in this age group show above-average interest in purchasing fashion from a designer collaboration, with almost three in 10 agreeing. Retailers can appeal to this age group with more premium brands and higher-priced pieces that form part of collaborations with established and up-and-coming designers.

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- **Close to two fifths of males are spending less on fashion since COVID**

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