

Clothing Retailing – UK – 2021

Report Price: £2195 | \$2995 | €2600

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 and the second national lockdown on the clothing market.
- How consumers' clothes shopping behaviours and attitudes have changed since COVID-19.
- Where people have bought clothes in the last 12 months in-store and online.
- How consumers have reacted to the reopening of fashion stores following the lockdown.

The clothing industry has made a steady recovery in the aftermath of the COVID-19 pandemic, and the subsequent store closures. Consumer confidence is starting to make a return, but the way consumers are shopping has changed significantly over the last 18 months. Retailers have continued to adapt to the increasing online demand, such as Marks and Spencer offering limited same-day delivery, and Next further expanding their online Total platform. There is also an increasing surge in re-wearing, recycling, and renting clothing in a bid to move away from fast fashion, with retailers increasingly highlighting their sustainability initiatives in response to consumer demand for more transparency within supply chains and a call for more sustainable practises.

The COVID-19 pandemic has highlighted to consumers what kind of purchases they can forgo – fashion purchases became more needs- rather than want-driven. Sustainability is an important part of the mix, and there is an acceleration in resale and upcycling, with 39% of consumers saying they would like to see clothing retailers provide better quality items, and 34% of consumers are wearing older items in their wardrobe than they were prior to the pandemic. The COVID-19 pandemic has widened the gap between the best and the poor-performing retailers. While this serves as a threat to those who can't keep up, it is also an opportunity for the big players to pick up these brands and grow their market share, such as boohoo with Debenhams, or Asos with Topshop.



"The clothing market remains under pressure, but it is starting to see a gradual recovery in 2021 as pent-up demand by consumers looking to update their wardrobes for socialising, events and going back to the office drives growth."

– **Tamara Sender Ceron,**
Senior Fashion Analyst

Buy this report now

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

Clothing Retailing - UK - 2021

Report Price: £2195 | \$2995 | €2600

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



Supply chain problems, increasing costs and warehouse labour and driver shortages are among the new challenges facing retailers; value retailers and those who run on low margins are most vulnerable, but this new crisis brought on by the aftermath of COVID-19 and Brexit, is also affecting the big online players; Asos have warned their profits for the 2021 financial year will be lower as a result, and while Next has seen a strong 2021 performance, they also warned that any increase in sales will be outweighed by increasing costs.

There has been a rise in hybrid shopping – consumers increasingly buying across multiple platforms – and ecommerce is continuously evolving. Three fifths of Baby Boomers visit stores less to try on clothes compared to before the pandemic, compared with over half of Generation X. There is an opportunity here for brands to attract the older generations back into stores; consumers value safety and security even after lockdown measures are long gone. Brands such as Uniqlo and Zara have already implemented self-checkouts, reducing face-to-face contact in-store, and Amazon continues to apply Just Walk Out payment to its physical spaces. Zara, too, has its Store Mode within the Zara app, by which users can shop an individual stores' inventory, smoothing out the click and collect service. The emphasis on retailers to become omnichannel is ever present in order for them to reach out to and provide for customers no matter where they are or how they choose to shop.

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.

Buy this report now

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

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

Table of Contents

OVERVIEW

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

EXECUTIVE SUMMARY

- **Impact of COVID-19 on clothing category**
Figure 1: Short-, medium- and long-term impact of COVID-19 on clothing, 2021
- **The market**
- **Revival in demand for clothing**
Figure 2: Consumer spending on clothing and accessories, 2016-26
- **Gradual recovery for specialists**
Figure 3: Retail sales through specialist clothing retailers, 2016-26
- **Online still the preference for consumers**
Figure 4: online sales of clothing and accessories, 2016-21 (est)
- **Companies and brands**
- **Next holds place as leading specialist**
Figure 5: Leading specialist retailers compound annual growth in revenues, 2016-20
- **Marks and Spencer still a trusted brand, while Uniqlo perceived as innovative**
Figure 6: Attitudes towards and usage of selected brands, 2021
- **Uptick in advertising spend with reopening of stores, especially on digital**
- **The Consumer**
- **Fashion purchases regaining traction**
Figure 7: Outerwear items purchased in the last three months, September 2020- October 2021
- **Online remains the preference, despite reopening of stores**
Figure 8: How consumers have bought clothes for themselves in the last 12 months, 2021
- **Amazon drops behind Marks and Spencer**
Figure 9: Retailers used to purchase clothing in the last 12 months (NET of retailers used to purchase in-store and/or online), 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.

Buy this report now

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

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

- **Shift to thrift: shopping for second-hand clothing is on the rise**

Figure 10: Changes to clothes shopping behaviour compared with pre-COVID-19, 2021

- **Events and holidays remain key purchasing drivers**

Figure 11: Motivations for buying new clothing, 2021

- **Huge demand for better quality items**

Figure 12: Main improvements consumers want from retailers/brands they buy clothes from, 2021

- **Shopping sustainably a fast-growing interest**

Figure 13: Current shopping behaviours and future interest in them, 2021

ISSUES & INSIGHTS

- **Who are the winners and losers in clothing?**
- **Winners**
- **Losers**
- **What are the main opportunities for driving growth?**
- **Growing second-hand market**
- **More personalised shopping experiences and products**
- **Promoting size inclusivity**
- **Rising awareness of sustainability in fashion**
- **Extending into new categories such as homeware**

MARKET SIZE AND PERFORMANCE

- **Clothing market hard hit by COVID-19**

Figure 14: Short-, medium- and long-term impact of COVID-19 on clothing, 2021

- **Restrictions on events hurt sales**

Figure 15: Consumer spending on clothing and accessories, at current prices and constant prices, 2016-26

- **Consumers polarised by financial effects of pandemic**

MARKET FORECAST

- **Pent-up demand drives growth**
- **Retailers hit by higher costs**
- **Reliance on online channels**

Figure 16: Market forecast the clothing and accessories market, 2026-26

- **Market drivers and assumptions**

Figure 17: Key drivers affecting Mintel's market forecast, 2015-26

- **Forecast methodology**

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.

Buy this report now

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

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

SECTOR SIZE AND PERFORMANCE

- Pent up demand grows**

Figure 18: Retail sales through specialist clothing retailers, 2016-26

Figure 19: Retail sales through specialist clothing retailers, at current and constant prices, 2016-26

- Rising costs affecting growth**

- Market drivers and assumptions**

- Clothing sales through specialist clothing retailers**

Figure 20: Sales of clothing and accessories through clothing retailers, 2016-21

Figure 21: Clothing specialists' share of consumer spending on clothing and accessories, 2016-21

MARKET DRIVERS

- Clothing falls deeper into deflation**

Figure 22: Consumer price inflation, 2010-20

- Footwear inflation drops below clothing during 2021**

Figure 23: Consumer price inflation, august 2020-august 2021

Figure 24: Real wages growth: wages growth vs inflation, January 2016-July 2021

- Boost in spending on entertainment**

Figure 25: Trends in what extra money is spent on, September 2020 and September 2021

Figure 26: Overweight and obesity prevalence in UK population, by gender, 2015-19

- Continued rise in time spent online**

Figure 27: Online activities on any device in the last three months, June 2018-June 2021

Figure 28: Trends in the age structure of the UK population, 2020-30

ONLINE

- Clothing and footwear driving ecommerce sales in 2021**

Figure 29: online sales of clothing and accessories, 2016-21 (est)

- Where they shop: Amazon remains a key player**

Figure 30: Retailers used to purchase clothing online in the last 12 months, August 2021

LEADING SPECIALIST RETAILERS

- Next remains the leading specialist**

Figure 31: Leading Specialist retailers net revenues, 2015-20

- Compound annual growth in revenues**

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.

Buy this report now

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

Figure 32: Leading specialist retailers compound annual growth in revenues, 2016-20

- **Effects of COVID-19 sees more stores close**

Figure 33: Leading specialist retailer's outlet numbers, 2015-20

- **Sales per outlet**

Figure 33: Leading specialist retailers estimated annual sales per outlet, 2015-20

LEADING NON-SPECIALIST RETAILERS

- **Sports retailers**
- **The disappearance of department stores**
- **Supermarkets show strength during COVID-19**
- **Surge in online shopping continues**

Figure 34: Leading non-specialist retailers estimated revenues, 2015-20

MARKET SHARES

- **Specialists lose share**
Figure 35: Leading retailers' estimated share of spending on clothing and footwear, 2016-20
- **Change in market shares**
Figure 36: Leading clothing retailers' change in share of clothing spending, 2016-20

INNOVATION AND LAUNCH ACTIVITY

- **Launches and store openings**
- **H&M team up with actor John Boyega for new menswear collection**
Figure 37: Edition by John Boyega and H&M, October 2021
- **Barbour collaborate with House of Hackney**
Figure 38: Barbour X House of Hackney collection, 2021
- **Adidas by Stella McCartney launch Earth Explorer collection**
- **Gucci opens experimental pop-ups in London, Berlin and Milan**
- **Brands taking a stand on social movements**
- **Nike supporting Black Lives Matter**
- **Tommy Hilfiger launches social good campaign**
- **Pretty Little Thing team up with CoppaFeel**
- **eCommerce**
- **Boohoo launches a Debenhams online marketplace**
- **Pinterest launches new shopping features**
- **Sustainability moves**

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.

Buy this report now

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

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

- Marks and Spencer pledges to be net zero by the year 2040
- & Other Stories launch recycling scheme
- ReBoot scheme by Hunter
- Rental, second-hand fashion and 'recommerce'
- The Vampire's Wife teams up with clothing rental site Hurr
- Childrenswear available to rent at Arket
- Rent a menswear suit at H&M
- Marks and Spencer trials rental service
- Fashion technology
- Ralph Lauren launches virtual fashion collection with Zepeto
- Zara launches Store Mode for its app and ecommerce platform
- Ted Baker releases AW21 collection on Nintendo's Animal Crossing

Figure 39: Ted Baker and Nintendo's Animal Crossing, October 2021

BRAND RESEARCH

- **Brand map**
Figure 40: Attitudes towards and usage of selected brands, 2021
- **Key brand metrics**
Figure 41: Key metrics for selected brands, 2021
- **Brand attitudes: Zara and Uniqlo seen as innovative**
Figure 42: Attitudes, by brand, 2021
- **Brand personality: Next perceived as accessible, but boring**
Figure 43: Brand personality – macro image, 2021
- **Asos viewed as an authoritative brand**
Figure 44: Brand personality – micro image, 2021
- **Brand analysis**
- **Zara seen as innovative but somewhat overrated, alongside River Island**
- **M&S a trusted brand, while Ted Baker seen as more exclusive**
- **Uniqlo ranks highly for being ethical as well as stylish**
- **Low-cost retailers remain easily accessible**
- **ASOS holds high brand awareness, while Next offers good online service**

WHAT THEY BUY

- Revived appetite for fashion

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.

Buy this report now

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

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

Figure 45: Fashion items purchased in the last three months, March 2020 – October 2021

- **Demand for denim rises**

Figure 46: Outerwear items purchased in the last three months, September 2020–October 2021

HOW THEY SHOP

- **Online still the preference for consumers**

Figure 47: How consumers have bought clothes for themselves in the last 12 months, 2021

- **Women still shopping online, while men return to stores**

Figure 48: People who have bought clothes for themselves in-store and/or online or have not bought clothes in the last 12 months by gender and age, August 2021

- **Younger generations returning to stores**

Figure 49: How consumers have bought clothes for themselves in the last 12 months, by generation, 2021

WHERE THEY SHOP

- **Amazon drop behind Marks and Spencer**

Figure 50: Retailers used to purchase clothing in the last 12 months (NET of retailers used to purchase in-store and/or online), 2021

- **Primark and Amazon hold onto their popularity**

Figure 51: Retailers used to purchase clothing in the last 12 months, by channel, 2021

- **Consumers looking to fewer retailers**

Figure 52: Repertoire of retailers used to purchase clothing in the last 12 months, by channel, 2021

CHANGES TO BEHAVIOUR SINCE COVID-19

- **Consumers become thriftier**

Figure 53: Changes to clothes shopping behaviour compared with pre-COVID-19, 2021

- **Casualisation of fashion**

- **Half of Gen X visit stores less to try on clothes**

Figure 54: Agreement with changes to visiting stores to try on clothes compared with pre-COVID-19, 2021

MOTIVATIONS FOR BUYING NEW CLOTHES

- **Holidays and events key drivers for purchasing**

Figure 55: Motivations for buying new clothing, 2021

- **Change in clothes size results in new purchases**

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.

Buy this report now

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

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

Figure 56: Motivations for buying new clothing, by generations, 2021

IMPROVEMENTS WANTED AT RETAILERS

- **Huge demand for better quality items**

Figure 57: Main improvements consumers want from retailers/brands they buy clothes from, 2021

- **Gen Z want unique designs**

Figure 58: Main improvements consumers want from retailers/brands they buy clothes from, by generations, 2021

CURRENT AND FUTURE CLOTHES SHOPPING BEHAVIOURS

- **Huge interest in sustainability**

Figure 59: Current shopping behaviours and future interest in them, 2021

Figure 60: Current and future interest in buying homeware from a fashion retailer, by generations, 2021

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

APPENDIX – MARKET/SECTOR SIZE AND FORECAST

- **Forecast methodology**

Figure 61: Forecast for consumer spending on clothing and accessories, 2021–26

Figure 62: forecast for retail sales of specialist clothing retailers, 2021–26

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.

Buy this report now

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](https://www.mintel.com)**.