This report looks at the following areas:

- The impact of COVID-19 on the clothing retail sector
- How the market will fare post-COVID-19
- How specialists are performing compared to non-specialists
- How clothing shopping behaviours have changed since the start of the COVID-19 outbreak
- The role of online and the emergence of online-only specialists
- The performance of the major clothing retailers in 2020.

Spending on clothing and accessories is mostly discretionary, and fashion is one of the key areas that consumers cut back on during the pandemic. So it was not surprising that clothing was one of the industries impacted most negatively by COVID-19. Overall, consumer spending on clothing was down almost 7% in 2020 in those countries in Europe for which we have data. Going forwards, some of the population will continue to struggle financially in the aftermath of the epidemic and value will remain an important factor when making non-essential purchases. Specialists are still dominant when it comes to spending on clothing but they continue to lose share of spending in the category due to strong competition from online pureplayers and non-specialists. Clothing specialist retailers saw their sales decline by more than a quarter in 2020.

“Clothing is among the sectors being hit the hardest by the ongoing COVID-19 outbreak across Europe. Consequently, the leading five economies experienced a significant fall in retail specialists’ sales of between around 13% and 32% in 2020.”
– Utku Tansel, European Retail Analyst
Table of Contents

OVERVIEW
• Products covered in this Report
• Key issues covered in this Report
• Country and company coverage
• Consumer research coverage
• Definitions
• Retail sector definitions
• Consumer spending definitions
• Financial definitions
• Currencies
• Abbreviations

COVID-19: MARKET CONTEXT
• Short, medium and long term impact on the sector
  Figure 1: Short, medium and long term impact of COVID-19 on clothing, 2021

EXECUTIVE SUMMARY – EUROPE – THE MARKET
• Consumer spending on clothing
  Figure 2: Europe: consumer spending on clothing (including VAT), 2016–21
  Figure 3: Europe: consumer spending on clothing (including VAT), 2020
  Figure 4: Europe: spending on clothing as % of all consumer spending, 2016–21
  Figure 5: Europe: clothing as % of all spending, 2020
  Figure 6: Europe: change in clothing’s share of all consumer spending, 2016–20
• Spending per capita
  Figure 7: Europe: spending on clothing per capita, including VAT, 2020
• Clothing specialists’ sales
  Figure 8: Europe Big Five: specialist clothing retailers, sales (excluding VAT), 2016–21
  Figure 9: Europe Big Five: specialist clothing retailers, forecast sales (excl. VAT), 2021–26
  Figure 10: Europe Big Five: clothing specialists sales, 2016–26
  Figure 11: Europe Big Five: clothing specialists’ sales by country, 2016–26
• Specialists relative to all spending
  Figure 12: Europe Big Five: sales by clothing specialists as % all spending on clothing, 2020

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
• Around a third of consumers are spending less on clothing
  Figure 13: Europe Big 5: changes to spending habits as a result of the COVID-19 pandemic, 2021
• Online
  Figure 14: UK, Germany, France, and Italy: online sales of clothing, including VAT, 2020
  Figure 15: Europe Big 5: changes to spending habits as a result of the COVID-19 pandemic, 2021
• Companies and brands
• Clothing specialists
• Fashion retailers’ sales drop while Inditex still in the lead
• Online benefits greatly from COVID-19
  Figure 16: Europe: leading clothing specialists, sales, 2016/17-2020/21
  Figure 17: Europe: leading clothing specialists, outlets, 2016/17-2020/21
• Market shares
  Figure 18: Leading clothing specialists, share of all spending on clothing and footwear, 2016/17-2020/21

EXECUTIVE SUMMARY – EUROPE – THE CONSUMER
• The research
• Where people shop
• In-store vs online
  Figure 19: Europe: channels used for buying clothes in the last 12 months, 2021
  Figure 20: Europe: clothing shoppers who have bought online and not in-store, 2021
• Leading online retailers
  Figure 21: Europe: top five most popular retailers for online clothing shopping, 2021
• Leading in-store retailers
  Figure 22: Europe: top five most popular retailers for in-store clothing shopping, 2021
• Participation in selected behaviours when shopping for clothing
  Figure 23: Europe: clothing shopping behaviours, have done in the last 12 months, 2021
• Second-hand becomes more popular
• Empowering sustainable choices
• The emergence of the virtual world
  Figure 24: Europe: clothing shopping behaviours, haven’t done but interested in doing so in the future, 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
EXECUTIVE SUMMARY – EUROPE – LAUNCH ACTIVITY AND INNOVATION

• Sustainability moves higher up on fashion retailers’ agenda
• Marks & Spencer pledges to be net zero by the year 2040
• & Other Stories introduce recycling scheme
• ReBoot scheme by Hunter
• Inditex unveils a new sustainability initiative
• Mango launches a new sustainable brand
• H&M continues to expand its commitment to sustainability
• Primark extends recycling service to Europe
• United Colors of Benetton debuts a new sustainable store concept
• Second hand takes off
• Rental becoming more popular
• The Vampire’s Wife teams up with clothing rental site Hurr
• Childrenswear available to rent at Arket
• Rent a menswear suit at H&M
• Fashion technology and virtual world
• Retailers continue to experiment with new formats/collaborations to create a point of differentiation
• In the UK, H&M teams up with actor John Boyega for new menswear collection
• Gucci opens experimental pop-ups in Germany, Italy and the UK
• Adidas continues its collaboration with Stella McCartney launching a new collection
• Barbour partners with House of Hackney
• Brands taking a stand on social movements
• Tommy Hilfiger launches social good campaign
• Nike supporting Black Lives Matter
• Ecommerce remains an important focus for retailers even after stores opened
• Pinterest unveils new shopping features
• Boohoo launches a Debenhams online marketplace

FRANCE

• Overview
• Key issues covered in this Report
• Areas covered in this Report
• Executive summary
• COVID-19: market context

Figure 25: France: short, medium and long term impact of COVID-19 on clothing retailing, 2021

• The market

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
• Market size and forecast
  Figure 26: France: consumer spending on clothing (including VAT), 2016-21

• Retail sector size and forecast
  Figure 27: France: specialist clothing retailers, sales (excluding VAT), 2016-21

• Channels to market
  The consumer
  • How they shop for clothing
    Figure 28: France: how consumers have bought clothes for themselves in the last 12 months, 2019-21
    Figure 29: France: 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, 2021
  • Where they shop for clothing
    Figure 30: France: retailers used to purchase clothing (in-store or online) in the last 12 months, 2021 vs 2020
    Figure 31: France: retailers shopped by age and gender, 2021
  • Participation in selected behaviours when shopping for clothing
    Figure 32: France: clothing shopping behaviours, 2021

• Companies and brands
  • Market shares
    Figure 33: France: Leading specialist clothing retailers, sales as % all spending on clothing, 2020

• Online

• Issues and insights
  • COVID-19 has accelerated the development of technology in fashion
  • Sustainability issues are high priority

• The market
  • Market size and performance
    Figure 34: France: consumer spending on clothing (including VAT), 2016-21
  • Retail sector size and forecast
    Figure 35: France: specialist clothing retailers, sales (excluding VAT), 2016-21
    Figure 36: France: specialist clothing retailers, forecast sales (excluding VAT), 2021-26
  • Market drivers
  • The economy is strengthening
  • Domestic demand is a key growth driver for retailers
  • The jobs market has been more resilient than expected

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
• Potential for more social unrest
  Figure 37: France: key economic projections, % annual change, 2019-23
• Consumers are feeling more optimistic
  Figure 38: France: trends in levels of consumer confidence, 2019-21
• Retail sales began to recover in spring 2021
  Figure 39: France: year-on-year retail sales volume growth, 2019-21
  Figure 40: France: percentage change in first half value retail sales, by category, 2021
• Inflation
  Figure 41: France: consumer prices * of clothing and footwear, annual % change, 2016-20
  Figure 42: France: consumer prices * of clothing and footwear, annual % change, 2020-21
• More confidence about shopping in-store
  Figure 43: France: changes in spending habits since the start of the outbreak, 2020-21
• Social inequalities exist
  Figure 44: France: financial impact of the COVID-19 pandemic, 2021
• A third of consumers are spending less on clothing
  Figure 45: France: changes to spending habits as a result of the COVID-19 pandemic, 2021
• Channels to market
  • The consumer
    • How they shop for clothing
      Figure 46: France: how consumers have bought clothes for themselves in the last 12 months, 2019-21
      Figure 47: France: how consumers have bought clothes for themselves in the last 12 months, by gender and age group, 2021
    • The growing importance of smartphones
      Figure 48: France: how consumers have bought clothes for themselves in the last 12 months, 2021
    • Young women have continued to shop, while young men cut back
      Figure 49: France: 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, 2021
  • Where they shop for clothing

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 50: France: types of retailers used to purchase clothing (in-store or online) in the last 12 months, by channel, 2021
Figure 51: France: retailers used to purchase clothing in-store in the last 12 months, 2021
Figure 52: France: retailers used to purchase clothing online in the last 12 months, 2021

Customer profiles
Figure 53: France: retailer customer profiles, by gender, 2021
Figure 54: France: retailer customer profiles, by age, 2021
Figure 55: France: retailers shopped by age and gender, 2021

Participation in selected behaviours when shopping for clothing
Figure 56: France: clothing shopping behaviours, 2021

Second-hand
Figure 57: France: clothing shopping behaviours by retailer shopped, 2021

Sustainability
Figure 58: France: clothing shopping behaviours by retailer shopped, 2021

The virtual world
Figure 59: France: clothing shopping behaviours by retailer shopped, 2021

Adding services could enhance stores’ attractiveness
Figure 60: France: clothing shopping behaviours by retailer shopped, 2021

Companies and brands
- The distribution landscape is changing
- Mergers & acquisitions
- The FIB group on a buying spree
- Groupe Beaumanoir benefits from the Vivarte collapse
- Clothing brands partnering with hypermarkets

Diversification into second hand
Figure 61: France: leading specialist clothing retailers, sales (excluding VAT), 2016-20
Figure 62: France: leading specialist clothing retailers, outlets, 2016-20

Market shares
Figure 63: France: leading specialist clothing retailers, sales as % all spending on clothing, 2016-20

Online
- Online retailing in France
- The clothing sector online
• Leading online players
• Appendix – Research methodology, data sources and abbreviations
• Abbreviations
• Data sources

ITALY
• Overview
• Key issues covered in this Report
• Areas covered in this Report
• Executive summary
• COVID-19: market context
  Figure 64: Italy: short, medium and long term impact of COVID-19 on clothing retailing, October 2021
• The market
• Market size and forecast
  Figure 65: Italy: consumer spending on clothing (including VAT), 2016-21
• Market drivers
• Retail sector size and forecast
  Figure 66: Italy: specialist clothing retailers, sales (excluding VAT), 2016-21
• Channels to market
  Figure 67: Italy: estimated distribution of spending on clothing and footwear by channel, 2020
• The consumer
• How they shop for clothing
  Figure 68: Italy: how people have bought clothes (excluding underwear and footwear) for themselves in the last 12 months, 2019-21
• Where they shop for clothing
  Figure 69: Italy: retailers used for buying clothes for themselves in the past 12 months, 2021
• Participation in selected behaviours when shopping for clothing
  Figure 70: Italy: participation in selected behaviours when shopping for clothing, 2021
• Companies and brands
• Leading players
• Market shares
  Figure 71: Italy: leading specialist clothing retailers, sales as % all spending on clothing and footwear, 2016-20
• Online

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
• Issues and insights
  • COVID is changing the way specialist clothing retailers operate
  • Retailers need to build resilience into their business models
  • The importance of being omnichannel
  • Is store-only a viable strategy anymore?
  • Clothes shopping behaviours still being impacted by COVID
  • Working from home: good for online but has brought changes in the sales mix
  • The growing focus on sustainability
  • Sustainability has risen up the consumer agenda
  • Companies need to take a lead
  • A growing market with potential
  • Transparency is key
  • Second-hand will become an important pillar of sustainability
• The market
  • Market size and performance
    Figure 72: Italy: consumer spending on clothing and footwear (including VAT), 2016–21
  • Retail sector size and forecast
    Figure 73: Italy: specialist clothing retailers, sales (excluding VAT), 2016–21
    Figure 74: Italy: specialist clothing retailers, forecast sales (excluding VAT), 2021–26
  • Market drivers
  • The Italian economy
    Figure 75: Italy: key economic projections, % annual change, 2019–22
  • Consumer confidence rises
    Figure 76: Italy: trends in levels of consumer confidence, 2019–21
  • Trends in retail sales
    Figure 77: Italy: year-on-year retail sales volume growth, 2019–21
    Figure 78: Italy: percentage annual change in first quarter value retail sales, by category, 2021
  • Inflation
    Figure 79: Italy: consumer prices* of clothing and footwear, annual % change, 2016–20
    Figure 80: Italy: consumer prices * of clothing and footwear, annual % change, 2020–21
  • The continuing impact of COVID

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

reports.mintel.com © 2021 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.
Figure 81: Italy: changes in spending habits since the start of the COVID outbreak, 2020-21
Figure 82: Italy: financial impact of the COVID-19 pandemic, 2021
Figure 83: Italy: financial situation since start of the COVID outbreak, 2021
Figure 84: Italy: changes to spending habits as a result of the COVID-19 pandemic, 2021

• **Sustainability moves to the forefront of consumers’ minds**
  Figure 85: Italy: agreement with statements about sustainability and price, 2021
  Figure 86: Italy: agreement with statements about sustainability and price, vs other major European nations, 2021
  Figure 87: Italy: attitudes relating to climate change, 2021

• **Wellness trend offers opportunities for clothing retailers to innovate**
  Figure 89: Italy: main wellness priorities, 2021

• **Channels to market**
  Figure 90: Italy: estimated distribution of spending on clothing and footwear by channel, 2020

• **The consumer**
  • **How they shop for clothing**
    Figure 91: Italy: how people have bought clothes (excluding underwear and footwear) for themselves in the last 12 months, 2019-21
  • **Laptops/desktops still important for buying clothes**
    Figure 92: Italy: how people have bought clothes (excluding underwear and footwear) for themselves in the last 12 months, by detailed category, 2020-21
  • **Almost half of clothes buyers only shop in-store**
    Figure 93: Italy: exclusive clothes shopper groups, 2021
  • **Channel age profiles**
    Figure 94: Italy: how people have bought clothes (excluding underwear and footwear) for themselves in the last 12 months, by age, 2021
    Figure 95: Italy: how people have bought clothes (excluding underwear and footwear) for themselves in the last 12 months, by employment location, 2021
  • **Where they shop for clothing**
  • **Specialists still the most popular place to buy clothes**
Figure 96: Italy: retailers used for buying clothes for themselves in the past 12 months, 2021

- Specialists dominate in-store buying but supermarkets are important outlets too

Figure 97: Italy: retailers used for buying clothes in-store for themselves in the past 12 months, 2021

- Amazon leads online channel but Zalando is also more popular than store-based specialists online

Figure 98: Italy: retailers used for buying clothes online for themselves in the last 12 months, 2021

- Retailer profiles

Figure 99: Italy: retailer customer profile, by gender, 2021
Figure 100: Italy: retailer customer profile, by age, 2021
Figure 101: Italy: retailer customer profile, by financial situation, 2021

- Clothes buyers shop across a wide portfolio of brands

Figure 102: Italy: retailers used for buying clothes for themselves in the past 12 months, by retailers used for buying clothes for themselves in the past 12 months, 2021

- OVS has lowest online conversion of in-store shoppers

Figure 103: Italy: retailers used for buying clothes in-store for themselves in the past 12 months, 2021

- Participation in selected behaviours when shopping for clothing

- Sustainability rises by clothes buyers’ agendas

- Services drive store footfall

- Second-hand takes off

- Broadening the offer

- Virtual try-on taking off and attracts strong future interest

- Styling apps also have appeal

- Pay-later schemes boost payment options

Figure 104: Italy: participation in selected behaviours when shopping for clothing, 2021

- Leading brands making headway on sustainable clothing

Figure 105: Italy: participation in selected behaviours in the last 12 months, by retailers used for buying clothes for themselves in the last 12 months, 2021

- Strong interest in buying sustainable clothing in the future

Figure 106: Italy: interest in participating in selected behaviours in the future, by retailers used for buying clothes for themselves in the last 12 months, 2021
- Companies and brands
- Inditex consolidates its position
- OVS builds on good performance and makes acquisitions
- Calzedonia not as badly hit by COVID as some
- H&M continues to innovate
- Zalando benefits from lockdown boost
- Benetton tries to seize the sustainability initiative
- Primark scales up
  - Figure 107: Italy: leading specialist clothing retailers, sales (excl VAT), 2016–20
  - Figure 108: Italy: leading specialist clothing retailers, outlets, 2016–20
- Market shares
  - Figure 109: Italy: leading specialist clothing retailers, sales as % all spending on clothing and footwear, 2016–20
- Online
- Online retailing in Italy
- The clothing sector online
- Leading online players
  - Figure 110: Italy: leading retailers’ estimated clothing sales online, 2020
- Appendix
- Abbreviations
- Data sources

SPAIN
- Overview
- Key issues covered in this Report
- Areas covered in this Report
- Executive summary
- COVID-19: market context
  - Figure 111: Spain: short, medium and long term impact of COVID-19 on clothing retailing, 2021
- The market
- Market size and forecast
  - Figure 112: Spain: consumer spending on clothing (including VAT), 2016–21
- Retail sector size and forecast
  - Figure 113: Spain: specialist clothing retailers, sales (excl. VAT), 2016–21
- Market drivers
- Channels to market
- The consumer

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
• How they shop for clothing
  Figure 114: Spain: how consumers have bought clothes for themselves in the last 12 months, 2021
• Where they shop for clothing
  Figure 115: Spain: types of retailers used to purchase clothing in the last 12 months, 2021
• Participation in selected behaviours when shopping for clothing
  Figure 116: Spain: clothing shopping behaviours, 2021
• Companies and brands
• Leading players
• Market shares
• Online
• Issues and insights
• On-demand fashion a solution to overproduction and waste
• Mainstream retailers pivot more to resale, as buyers flock to peer-to-peer marketplaces
• The market
• Market size and performance
  Figure 117: Spain: consumer spending on clothing (including VAT), 2016-21
• Retail sector size and forecast
  Figure 118: Spain: specialist clothing retailers, sales (excluding VAT), 2016-21
  Figure 119: Spain: specialist clothing retailers, forecast sales (excl. VAT), 2021-26
• Market drivers
• Economy hit hard by COVID-19 in 2020, but beginning to bounce back
  Figure 120: Spain: key economic projections, % annual change, 2019-22
• Easing of lockdown restrictions triggers uplift in consumer confidence
  Figure 121: Spain: trends in levels of consumer confidence, 2019-21
• Retail sales bounce back in spring 2021, but suffer a blow with resurgence in COVID-19 cases
  Figure 122: Spain: year-on-year retail sales volume growth, 2019-21
• Inflation
  Figure 123: Spain: consumer prices * of clothing and footwear, annual % change, 2016-20

---

**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 124: Spain: consumer prices of clothing and footwear, annual % change, 2020-21

• People more confident about shopping in-store, but online habits persist
  Figure 125: Spain: changes in spending habits since the start of the outbreak, 2020-21

• Uncertainty surrounding the pandemic drives up savings
  Figure 126: Spain: financial impact of the COVID-19 pandemic, 2021

• Prioritising essential purchases over non-essentials
  Figure 127: Spain: changes to spending habits as a result of the COVID-19 pandemic, 2021

• Channels to market
  • The consumer
  • How they shop for clothing
  • Gap between in-store and online clothes shopping shrinking
    Figure 128: Spain: how consumers have bought clothes for themselves in the last 12 months, 2019-21

• Shift to online clothes buying being driven by Generation X and Millennial shoppers
  Figure 129: Spain: how consumers have bought clothes for themselves in the last 12 months, by gender and age group, 2021

• Laptop/desktop most popular online buying method, but activity shifting to mobile devices
  Figure 130: Spain: how consumers have bought clothes for themselves in the last 12 months, 2021

• Where they shop for clothing
  • Clothing specialists still preferred buying destination, be it in-store or online
    Figure 131: Spain: types of retailers used to purchase clothing in the last 12 months, by channel, 2021

• El Corte Inglés the single most popular in-store purchasing destination
  Figure 132: Spain: types of retailers used to purchase clothing in-store in the last 12 months, 2021

• Amazon the single most popular online purchasing destination for clothing
  Figure 133: Spain: types of retailers used to purchase clothing online in the last 12 months, 2021

• Customer profiles
  Figure 134: Spain: retailer customer profiles, by gender, 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
Figure 135: Spain: retailer customer profiles, by age, 2021
- Participation in selected behaviours when shopping for clothing
- Stores need to work harder to make the trip worthwhile for shoppers
- Dressing the home as well as the wardrobe
- Sustainability to become a bigger influence on shoppers’ choice of clothing
- Shoppers looking for a cheaper and greener way to buy clothing turning to online resale platforms

Figure 136: Spain: clothing shopping behaviours by age, 2021
- Companies and brands
  - Inditex betting on pandemic habits sticking and expanding integrated store concept
  - Store-only Primark sales dented by COVID-19 lockdowns but pressing ahead with bricks-and-mortar strategy
  - Tendam emulating online fashion pure-players one-stop shop strategy
  - Zalando consumers benefit from faster delivery
  - Mango offers enhanced online and in-store experience
  - C&A slashes home delivery waiting time and expands digital footprint
  - Kiabi shop-in-shop concept and second-hand clothes push

Figure 137: Spain: clothing shopping behaviours by age, 2021
- Market shares

Figure 138: Spain: clothing shopping behaviours by age, 2021
- Online
- Online retailing in Spain
- The clothing sector online
- Leading online players

Figure 139: Spain: clothing shopping behaviours by age, 2021
- Appendix
- Abbreviations
- Data sources
UK

• 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 145: Short-, medium- and long-term impact of COVID-19 on clothing, 2021

The market

Revival in demand for clothing
Figure 146: Consumer spending on clothing and accessories, 2016-26

Gradual recovery for specialists
Figure 147: Retail sales through specialist clothing retailers, 2016-26

Online still the preference for consumers
Figure 148: Online sales of clothing and accessories, 2016-21 (est)

Companies and brands

Next holds place as leading specialist
Figure 149: Leading specialist retailers compound annual growth in revenues, 2016-20

Marks and Spencer still a trusted brand, while Uniqlo perceived as innovative
Figure 150: 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 151: Outerwear items purchased in the last three months, September 2020-October 2021

Online remains the preference, despite reopening of stores
Figure 152: How consumers have bought clothes for themselves in the last 12 months, 2021

Amazon drops behind Marks and Spencer
Figure 153: Retailers used to purchase clothing in the last 12 months (NET of retailers used to purchase in-store and/or online), 2021

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

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

- Events and holidays remain key purchasing drivers
- Huge demand for better quality items
- Shopping sustainably a fast-growing interest

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
- Restrictions on events hurt sales
- Consumers polarised by financial effects of pandemic

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

Market drivers and assumptions
- Forecast methodology
- Sector Size and Performance
- Pent up demand grows

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

What’s included
- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions
Figure 163: 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 164: Sales of clothing and accessories through clothing retailers, 2016–21
  
  Figure 165: Clothing specialists’ share of consumer spending on clothing and accessories, 2016–21

- Market Drivers
  
  Clothing falls deeper into deflation
  
  Figure 166: Consumer price inflation, 2010–20

- Footwear inflation drops below clothing during 2021
  
  Figure 167: Consumer price inflation, August 2020–August 2021

- Boost in spending on entertainment
  
  Figure 169: Trends in what extra money is spent on, September 2020 and September 2021

- Continued rise in time spent online
  
  Figure 171: Online activities on any device in the last three months, June 2018–June 2021

- Online
  
  Clothing and footwear driving ecommerce sales in 2021
  
  Figure 173: Online sales of clothing and accessories, 2016–21 (est)

- Where they shop: Amazon remains a key player
  
  Figure 174: Retailers used to purchase clothing online in the last 12 months, August 2021

- Leading Specialist Retailers
  
- Next remains the leading specialist
  
  Figure 175: Leading Specialist retailers net revenues, 2015–20

- Compound annual growth in revenues
  
  Figure 176: Leading specialist retailers compound annual growth in revenues, 2016–20

- Effects of COVID-19 sees more stores close
  
  Figure 177: Leading specialist retailer’s outlet numbers, 2015–20

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
• Sales per outlet
  Figure 178: 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 179: Leading non-specialist retailers estimated revenues, 2015-20
• Market Shares
• Specialists lose share
  Figure 180: Leading retailers’ estimated share of spending on clothing and footwear, 2016-20
• Change in market shares
  Figure 181: 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 182: Edition by John Boyega and H&M, October 2021
• Barbour collaborate with House of Hackney
  Figure 183: 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
• 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 184: Ted Baker and Nintendo’s Animal Crossing, October 2021
• Brand Research
• Brand map
  Figure 185: Attitudes towards and usage of selected brands, 2021
• Key brand metrics
  Figure 186: Key metrics for selected brands, 2021
• Brand attitudes: Zara and Uniqlo seen as innovative
  Figure 187: Attitudes, by brand, 2021
• Brand personality: Next perceived as accessible, but boring
  Figure 188: Brand personality – macro image, 2021
• Asos viewed as an authoritative brand
  Figure 189: 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
  Figure 190: Fashion items purchased in the last three months, March 2020 – October 2021
• Demand for denim rises
  Figure 191: Outerwear items purchased in the last three months, September 2020-October 2021
• How They Shop
• Online still the preference for consumers
  Figure 192: How consumers have bought clothes for themselves in the last 12 months, 2021
• Women still shopping online, while men return to stores
Figure 193: 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 194: 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 195: 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 196: Retailers used to purchase clothing in the last 12 months, by channel, 2021

- Consumers looking to fewer retailers
  Figure 197: 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 198: 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 199: 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 200: Motivations for buying new clothing, 2021

- Change in clothes size results in new purchases
  Figure 201: Motivations for buying new clothing, by generations, 2021

- Improvements Wanted at Retailers
  Huge demand for better quality items
  Gen Z want unique designs
  Figure 202: Main improvements consumers want from retailers/brands they buy clothes from, 2021

- Current and Future Clothes Shopping Behaviours
  Figures 203: Main improvements consumers want from retailers/brands they buy clothes from, by generations, 2021

- Huge interest in sustainability
  Figure 204: Current shopping behaviours and future interest in them, 2021

- Growing potential for homeware market
Figure 205: 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 206: Forecast for consumer spending on clothing and accessories, 2021-26
  - Figure 207: Forecast for retail sales of specialist clothing retailers, 2021-26
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.