

Womenswear - UK - May 2021

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This report looks at the following areas:

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

Three in 10 female clothes shoppers have purchased second-hand garments in the last 12 months. While consumer spending on buying new clothes has declined over the last year, the second-hand clothing market is booming, driven by a trend for vintage fashion and a thrifter approach to shopping, with 43% of women agreeing that the price of clothes has become more important compared with prior to the pandemic.

COVID-19 has hit the womenswear market hard, leading to a 13.5% decline in consumer spending on women's clothing in 2020. Women have drastically cut back on their clothes purchasing because of changes to their lifestyles, removing the main drivers for buying new items. Consumer spending on womenswear has fallen to levels last seen in 2015, and while there will be pent-up demand for buying new clothes, we expect it to take several years for spending to fully recover to pre-pandemic levels.

The biggest threat to the market comes from changes in the shopping behaviour and spending power of young women aged 16-24, who have typically been the main clothes buyers. This demographic has been the hardest hit financially as a result of the pandemic. This uncertainty will impact their spending on clothing, and together with a declining interest in following the latest fashion trends, poses a significant threat to the youth fashion market.



"The womenswear market has been hard hit by the COVID-19 outbreak, with women drastically cutting back on their clothes purchasing. While there has been some pent-up demand for buying new clothes released with the opening of stores in April 2021 and as further restrictions ease, consumer spending on womenswear has fallen."

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

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However, there are also major opportunities as the most affluent AB females and those with a higher household income are more likely than average to have purchased clothing in the last 12 months. There is scope to appeal to these higher spenders with unique products and more personalised shopping experiences. As stores reopened on 12 April 2021, we have seen the launch of more destination fashion concept stores such as Farfetch's Browns store in Mayfair that combines retail with beauty and styling services, as well as a changing programme of cultural events.



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