

# Clothing Retailing - Italy - 2022

Report Price: £2195.0 | \$2963.9085 | €2470.253

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 the cost-of-living crisis on the clothing retail sector
- The performance of the major clothing retailers in 2021
- The main channels used to purchase clothes and how this is evolving
- How clothing shopping behaviours have changed as a result of the cost of living crisis
- The role of online and the impact of online-only specialists.

Surprisingly, given the growing pressure on household incomes, Italians have shown themselves prepared to embrace sustainability when it comes to their clothing purchases, with more than a third having bought clothing made out of sustainable materials in the past year and a similar proportion interested in doing so. Additionally, sizeable percentages have bought and sold second-hand and rented clothes. What is more, future interest in these activities is extremely strong, indicating a clear path for retailers to follow.

The cost of living crisis is causing large increases in Italians' regular monthly outgoings and forcing them to cut back on non-essential spending. While people have to buy clothing, they are changing the way they buy, with more than half having switched to a cheaper retailer in the past year.

One of the biggest threats to the specialist clothing retailers sector is the growth of cheap online-only retailers from Asia like Shein and AliExpress, which are able to sell garments at prices most other retailers cannot and, in the current cost-conscious environment, they are thriving.

One of the biggest opportunities for specialist clothing retailers is for them to try and create an ecosystem of circularity which makes it less likely that their customers will need go elsewhere to buy and sell second-hand or rent clothes. At the same time this is likely to build increased loyalty towards their brands.



"The cost of living crisis in Italy has forced consumers to reappraise and reprioritise their regular spending, with the result that sales of specialist clothing retailers are still some way below their pre-COVID levels.

Competition from online-only generalists and specialists has also intensified."

– Michael, Senior Retail 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

## Table of Contents

### OVERVIEW

- Key issues covered in this Report
- Market context
- Areas covered in this Report

### EXECUTIVE SUMMARY

- **The five-year outlook for clothing retailers in Italy**  
Figure 1: Italy: outlook for clothing retailers, 2022-27
- **The market**
- **Market size and performance**  
Figure 2: Italy: consumer spending on clothing (including VAT), 2017-22
- **Retail sector size and forecast**  
Figure 3: Italy: specialist clothing retailers, sales (excluding VAT), 2017-23
- **Market drivers**
- **The consumer**
- **How they shop for clothing**  
Figure 4: Italy: how people have bought clothes (excluding underwear and footwear) for themselves in the last 12 months, 2019-22
- **Where they shop for clothing**  
Figure 5: Italy: retailers used for buying clothes for themselves in the past 12 months (net of in-store and online), 2021-22
- **Selected behaviours when shopping for clothing**  
Figure 6: Italy: participation in selected behaviours when shopping for clothing, 2022
- **The retailers**
- **Inditex bounces back to consolidate market leadership**  
Figure 7: Italy: leading specialist clothing retailers, sales as % of spending on clothing, 2021

### ISSUES AND INSIGHTS

- How can clothing retailers help their customers cope with the cost of living crisis?
- Buy now, pay later: no retailer should be without it
- Other purchase options
- Not just about ownership from new
- How can store-based clothing specialists counter growing competition from discounters and online-only players?
- Stores have a halo effect on online and vice versa
- Leveraging customer service

### 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](https://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.

- **Creating an ecosystem**
- **Highlight brand values and ethics**
- **Make the argument for value, quality and sustainability**
- **Emphasise that returns are easier**

### MARKET SIZE AND PERFORMANCE

- **Spending on clothing struggles to regain lost ground**

Figure 8: Italy: consumer spending on clothing and footwear (including VAT), 2017-22

### RETAIL SECTOR SIZE AND FORECAST

- **Pandemic cut deep for clothing specialists**

Figure 9: Italy: specialist clothing retailers, sales (excluding VAT), 2017-23

### MARKET DRIVERS

Figure 10: Italy: key economic projections, 2019-23

- **Inflation is the key issue for consumers and retailers...**

Figure 11: Italy: consumer prices\* of clothing, annual % change, 2017-21

Figure 12: Italy: consumer prices \* of clothing, annual % change, 2021-22

- **...and energy prices are still a major concern**

Figure 13: Italy: issues which have affected Italian consumers over the last two months, 2022

Figure 14: Italy: trends in consumers' financial situation, 2022

Figure 15: Italy: consumers' financial situation compared to a year or so ago, 2022

Figure 16: Italy: how consumers feel about their financial situation in the next year or so, 2022

- **...and will delay the post-COVID recovery**

- **Consumer spending power will be curbed**

Figure 17: Italy: what people would spend on if they had some money left over, 2021-22

- **Interest rate rises will exacerbate cost of living pressures**

- **The conflict in Ukraine is hurting the Italian economy**

- **Sustainability and the environment are still important to consumers**

Figure 18: Italy: agreement with statements about sustainability, sourcing and price, 2022

Figure 19: Italy: attitudes to sustainability issues, impacts and responsibilities, 2021-22

- **Unemployment is still an issue, particularly among the young**

### 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](https://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 - Italy - 2022

Report Price: £2195.0 | \$2963.9085 | €2470.253

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



- **COVID has not gone away**

### CHANNELS TO MARKET

Figure 20: Italy: estimated distribution of spending on clothing by channel, 2021

### HOW THEY SHOP FOR CLOTHING

- **Online and in-store purchasing both grow in 2022**

Figure 21: Italy: how people have bought clothes (excluding underwear and footwear) for themselves in the last 12 months, 2019-22

- **Smartphones are fastest-growing online channel**

Figure 22: Italy: how people have bought clothes (excluding underwear and footwear) for themselves in the last 12 months, by detailed category, 2020-22

- **Clothes shoppers increasingly embracing omnichannel purchasing**

Figure 23: Italy: exclusive clothes shopper groups, 2022

- **Online growth driven by 25-44s but also evident among over-65s**

Figure 24: Italy: how people have bought clothes (excluding underwear and footwear) for themselves in the last 12 months, by age, 2022

- **Home working is helping to drive online growth**

Figure 25: Italy: how people have bought clothes (excluding underwear and footwear) for themselves in the last 12 months, by employment location, 2022

- **Children also contribute to increased clothes shopping online**

Figure 26: Italy: how people have bought clothes (excluding underwear and footwear) for themselves in the last 12 months, by whether or not respondent has children aged under 18, 2022

### WHERE THEY SHOP FOR CLOTHING

- **Store-based retailers bounce back**
- **OVS stages strong recovery**

Figure 27: Italy: retailers used for buying clothes for themselves in the past 12 months (net of in-store and online), 2021-22

- **Strength of OVS is derived from in-store shopping**

Figure 28: Italy: retailers used for buying clothes in-store for themselves in the past 12 months, 2021-22

### 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](https://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

- **Amazon leads online channel as Zalando is leading specialist**

Figure 29: Italy: retailers used for buying clothes online for themselves in the last 12 months, 2021-22

- **Amazon and Primark have most even balance of shoppers by gender**

Figure 30: Italy: retailer customer profile, by gender, 2022

- **Inditex brands appeal to a younger audience**

Figure 31: Italy: retailer customer profile, by age, 2022

- **Cost of living crisis set to hit brands across the board**

Figure 32: Italy: retailer customer profile, by financial situation, 2022

- **Clothes shoppers have broad portfolios of brands that they shop at**

Figure 33: 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, 2022

- **Italian store-based brands perform poorly compared to multinational brands on omnichannel shopping**

Figure 34: Italy: retailers used for buying clothes for themselves online in the past 12 months, by retailers used for buying clothes in-store for themselves in the past 12 months, 2022

## SELECTED BEHAVIOURS WHEN SHOPPING FOR CLOTHING

- **More than half of clothes shoppers have switched to cheaper retailers**
- **More than a third have bought sustainable clothing and similar proportion interested in doing so**
- **Clothes shoppers are happy to buy other products that buy into a brand's values as well**
- **Circular economy gathers pace**
- **Buy now, pay later usage looks set to increase**

Figure 35: Italy: participation in selected behaviours when shopping for clothing, 2022

- **Opportunities and threats for Zara?**

Figure 36: Italy: participation in selected behaviours when shopping for clothing (percentage agreeing 'I have done this in the last 12 months'), by retailer shopped at in the past 12 months (net of in-store and online), 2022

- **Terranova customers open to new products and services**

Figure 37: Italy: participation in selected behaviours when shopping for clothing (percentage agreeing 'I haven't done

## 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](https://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 - Italy - 2022

Report Price: £2195.0 | \$2963.9085 | €2470.253

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



this in the last 12 months but would be interested in doing so in future'), by retailer shopped at in the past 12 months (net of in-store and online), 2022

### THE RETAILERS

- **Inditex bounces back to consolidate market leadership**
- **OVS reports strong growth but still loses ground to Inditex**
- **Calzedonia**
- **Zalando continues to build on pandemic gains**
- **H&M slower to recover but shows signs of improvement**
- **Other players**
- **Primark is on the up**
- **Most domestic Italian brands under pressure**
- **Mango has ambitions to grow in Italy**
- **Shein: opaque but becoming more important**

Figure 38: Italy: leading specialist clothing retailers, sales (excl VAT), 2017-21

Figure 39: Italy: leading specialist clothing retailers, outlets, 2017-21

### MARKET SHARES

Figure 40: Italy: leading specialist clothing retailers, sales as % of spending on clothing, 2017-21

### ONLINE

- **Online retailing in Italy**
- **Leading online players**

Figure 41: Italy: leading retailers' estimated clothing sales online, 2021

### APPENDIX – RESEARCH METHODOLOGY, DATA SOURCES AND ABBREVIATIONS

- **Abbreviations**
- **Consumer research methodology**
- **Data sources**

### 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](https://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)**.