

Fashion Online - UK - 2022

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This report looks at the following areas:

- How will the cost-of-living squeeze impact the online fashion market?
- How the online fashion market grew during COVID-19 and forecasts as the market matures.
- How and where people have bought fashion online in the last 12 months and the growth in smartphone purchasing.
- Changes in shopping behaviours when buying fashion online in the last year and demand for enhanced deliveries and wider range of products.
- What can retailers do to help consumers find the correct size/fit when buying clothes online?

Some 51% of shoppers bought fashion online from their smartphones in the last 12 months, with usage soaring by 10 percentage points since 2020, meaning that consumers are now almost equally as likely to purchase from smartphones as from desktops/laptops.

The cost-of-living crisis will constrain demand for fashion in the short term as most of the market is discretionary and therefore exposed to consumers cutting back spending. Online fashion sales have already dropped back in 2022, declining by 6.1% to £31.4bn, following soaring online usage during the pandemic, particularly during lockdown periods, with the market entering a period of consistent decline in 2022 as more demand returns to stores. A less restricted environment for other consumer-facing sectors, such as travel and music festivals, will bring opportunity for the release of some demand for fashion during the summer, particularly among younger consumers.

For the youngest Gen Zs, who are the most confident about their finances over the next year, fashion remains a priority, with 51% planning to spend more on buying clothes over the next three months from May 2022. While many of these consumers will continue to favour buying clothes and footwear from low-priced fast fashion retailers and pureplays, there is growing awareness about the impact on the environment and a pushback from some in this generation is



"In 2022, while growth in the online fashion market has slowed, the channel continues to capture a significantly greater share (44%) of overall spending on clothing and footwear than pre-pandemic."

Tamara Sender Ceron,
Associate Director, Fashion Retail

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likely to turbo-charge the second-hand and rental/subscription markets. Here the desire to refresh wardrobes in the face of financial pressure combined with strong eco-led buying behaviours will be powerful, leading to further growth for traditional (eBay) and new-wave (Depop and Vinted) second-hand platforms and larger brands who are increasingly moving into this space online, such as Levi's, which has launched its own online platform for vintage, and H&M, which has added a pre-loved offer to its website.

The rising rate of returns, exacerbated by heightened online shopping as a result of the pandemic, remains a threat to fashion retailers, as it is very costly for businesses financially and environmentally. Almost six in 10 shoppers have returned fashion items purchased online in the last 12 months, rising to 78% of young females aged 16-24, with half of female shoppers struggling to find the correct sizes when buying clothes/footwear online. In response to the high rate of returns, we have seen several fashion retailers including Zara and Next introduce charges for returns, but retailers are also investing in fit solutions to help consumers buy the correct sizes from the start.

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Table of Contents

OVERVIEW

- **Key issues covered in this Report**
- **Market context**
- **Products covered in this Report**

EXECUTIVE SUMMARY

- **The five-year outlook for online fashion**
Figure 1: Category outlook, 2022-27
- **The market**
- **Online fashion sales weaken as cost pressures increase**
Figure 2: Best- and worst-case forecast for consumer spending on online fashion, 2017-27 (prepared in June 2022)
- **Online captures 44% of fashion spending**
Figure 3: Online as a percentage of all spending on clothing, footwear and accessories, 2016-22
- **Inflation is the key concern for 2022 for consumers, brands and the economy**
- **Companies and brands**
- **Brands experiment with live shopping**
- **Shein usage soars**
Figure 4: Attitudes towards and usage of selected online-only brands, 2022
- **The consumer**
- **Footwear and womenswear most purchased online**
Figure 5: Fashion items bought online in the last 12 months, 2022
- **Older Millennials' usage of smartphones for fashion soars**
Figure 6: How consumers have bought fashion items online in the last 12 months, 2022
- **Young pureplay fashion market becomes more competitive**
Figure 7: Retailers without physical stores from where consumers have bought fashion online in the last 12 months, 2022
- **Next grows online, but value retailers set to benefit**
Figure 8: Retailers with physical stores from where consumers have bought fashion online in the last 12 months, 2022
- **Wide range of products is important**
Figure 9: Most important factors when choosing one retailer over another when buying fashion, 2022
- **Gen Zs worry about unsustainable packaging**
Figure 10: Agreement with shopping behaviours when shopping for fashion online, 2022

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- **Women find customer reviews most useful**

Figure 11: Most useful tools to help with finding the correct size/fit when shopping online for clothes, 2022

ISSUES AND INSIGHTS

- **Impact of cost-of-living squeeze on online fashion**
- **What are the main opportunities for growth in online fashion?**
- **Adapting to a new digital reality**
- **Promoting social commerce**
- **Enhancing delivery options**
- **Tapping into user-generated content**
- **Using fit solutions to reduce the growing issue of returns**

MARKET SIZE AND PERFORMANCE

- **Online fashion sales begin to fall in 2022**
Figure 12: Online consumer spending on clothing, footwear and accessories, 2017-22
- **Online captures 44% of fashion spending**
Figure 13: Online as a percentage of all spending on clothing, footwear and accessories, 2016-22

MARKET FORECAST

- **Five-year outlook for online fashion**
Figure 14: Category outlook, 2022-27
- **Online fashion sales weaken as cost pressures increase**
Figure 15: Best- and worst-case forecast for consumer spending on online fashion, 2017-27 (prepared in June 2022)
Figure 16: Consumer spending on online fashion, 2017-27
- **Pureplays see slowdown in sales**
- **Market drivers and assumptions**
Figure 17: Key drivers affecting Mintel’s market forecast, 2016-26
- **Learnings from the last income squeeze**
Figure 18: Value sales of online clothing, footwear and accessories, 2006-12
- **Forecast methodology**

MARKET DRIVERS

- **Personal ownership of consumer technology products**
Figure 19: Personal ownership of consumer technology products, 2021
- **Social media use**
Figure 20: Social media use, 2022

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
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- **Catering to an ageing population**
Figure 21: Trends in the age structure of the UK population, by gender, 2021 and 2026
- **The conflict in Ukraine will hurt the UK economy**
- **GDP reached pre-pandemic levels in November 2021...**
- **...but the post-COVID-19 bounce-back will be followed by a period of slower growth**
- **Employment has held up better than expected**
- **Inflation is the key concern for 2022 for consumers, brands and the economy**
Figure 22: Overall CPIH and garment CPIH percentage change, 2021-22
- **Consumers' financial wellbeing has slipped from its recent high point...**
Figure 23: Household financial wellbeing index, 2016-22
- **...and concerns over inflation are coming to the fore**
Figure 24: Consumer concerns about household finances, 2021-22

MARKET SHARES

- **Amazon has the largest share, but pureplays see declining growth**
Figure 25: Top ten online fashion retailers in the UK by estimated market share, 2021
Figure 26: Top online fashion retailers in the UK by estimated market share, 2020 and 2021

LAUNCH ACTIVITY AND INNOVATION

- **Fashion brands develop sizing and fitting tools online**
- **Meta acquires Presize, betting on virtual sizing technology**
- **The Very Group to launch personalised size and fit tool across 300 fashion brands**
Figure 27: The Very Group and Truefit too, 2022
- **Fashion brands add third-party offering**
- **Mountain Warehouse opens online marketplace**
- **Yoox debuts online high-end fashion marketplace**
- **Arket adds third-party brand for the first time**
- **Brands diversify offering outside fashion**
- **Mango to sell Ritual Cosmetics online**
- **Farfetch to launch its own beauty marketplace with over 100 brands**
- **More fashion brands enter rental market**

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- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
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- **M&S teams up with Dotte to launch childrenswear resale service**
- **Little Mistress partners with Hirestreet for rental service**
Figure 28: Little Mistress, 2022
- **Boohoo to launch resale platform for each of its 13 brands**
- **French Connection launches rental service from its own website**
- **Sustainable launches take on several formats**
- **JD Williams launches sustainable brand Anise**
- **YOOX launches RETHINK WITH <3**
- **Hugo Boss enters resale market with own platform Hugo Boss Pre-Loved**
- **Brands experiment with live shopping**
- **M&S to inspire customers via live stream shopping on its website**
- **Klarna launches Virtual Shopping via its Store App**
Figure 29: Klarna’s live shopping feature, 2022
- **Threads launches ecommerce and live shopping**
- **Savage X Fenty launches live shopping**
- **Omnichannel shopping post-COVID accelerates role of technology in stores**
- **Nike’s Rise concept store**
Figure 30: Nike’s inside track feature at its rise concept store in Seoul, 2021
- **Amazon’s first physical fashion store**
Figure 31: Amazon Style fitting room technology, 2022
- **Website launches**
- **Primark to relaunch website by the end of March**
- **M&S launches Goodmove on third-party sports website**
- **Bottega Veneta launches app with AR filter**

ADVERTISING AND MARKETING ACTIVITY

- **Ad spending soars in 2021**
Figure 32: Total above-the-line, online display and direct mail advertising expenditure on fashion by pureplays, 2018-22
- **Shein the top ad spender in 2021**
- **Shein and Klarna launch pop-up**
Figure 33: Klarna and Shein pop-up, 2022
- **Shein launches purposeful collection ‘evoluSHEIN’**
Figure 34: Total above-the-line, online display and direct mail advertising expenditure on fashion by pureplays, by top advertisers, 2018-22

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
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- **Digital channel dominated ad spending**
Figure 35: Recorded above-the-line, online display and direct mail total advertising expenditure on fashion by pureplays, by media type, 2021
- **Nielsen Ad Intel coverage**

BRAND RESEARCH

- **Brand map**
Figure 36: Attitudes towards and usage of selected brands, 2022
- **Key brand metrics**
Figure 37: Key metrics for selected brands, 2022
- **Brand attitudes: Very is highly trusted**
Figure 38: Attitudes, by brand, 2022
- **Brand personality: Shein perceived as fun, but unethical**
Figure 39: Brand personality – macro image, 2022
- **Thread seen as aspirational and Farfetch as expensive**
Figure 40: Brand personality – micro image, 2022
- **Brand analysis**
- **Shein’s usage soars**
- **Amazon and eBay expand fashion offer**
- **Very seen as stylish**
- **Farfetch and Thread expand their offering**

FASHION ITEMS BOUGHT ONLINE

- **Footwear and womenswear most purchased online**
Figure 41: Fashion items bought online in the last 12 months, 2022
- **Three in 10 men have not purchased fashion online**
Figure 42: Fashion items bought online in the last 12 months, by gender, 2022
- **Gen Zs and Younger Millennials buy most range of items**
Figure 43: Repertoire of fashion items bought online in the last 12 months, by age group, 2022

HOW THEY SHOP

- **Big rise in smartphone purchasing**
Figure 44: How consumers have bought fashion items online in the last 12 months, 2022
- **Older Millennials usage of smartphones for fashion soars**
Figure 45: Consumers who have bought fashion items online via a smartphone in the last 12 months, by age group, 2020 and 2022
- **Growth of marketplace app usage**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

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Figure 46: How consumers have bought fashion items online, 2022

WHERE THEY SHOP

- Multichannel retailers remain most popular**
 Figure 47: Types of retailers used to purchase clothing online in the last 12 months, 2022
- Young pureplay fashion market becomes more competitive**
 Figure 48: Retailers without physical stores from where consumers have bought fashion online in the last 12 months, 2022
- Next grows online, but value retailers set to benefit**
 Figure 49: Retailers with physical stores from where consumers have bought fashion online in the last 12 months, 2022
 Figure 50: Repertoire of retailers with physical stores and online-only retailers from where consumers have bought fashion online in the last 12 months, 2022

MOST IMPORTANT FACTORS WHEN BUYING FASHION ONLINE

- Wide range of products is important**
 Figure 51: Most important factors when choosing one retailer over another when buying fashion, 2022
- Enhancing delivery options**
 Figure 52: Most important factors when choosing one retailer over another when buying fashion, 2022
- Baby Boomers most brand loyal**

SHOPPING BEHAVIOURS

- Close to six in 10 return items purchased online**
 Figure 53: Agreement with shopping behaviours when shopping for fashion online, 2022
- Gen Zs worry about unsustainable packaging**
 Figure 54: Agreement with statement 'I am concerned about the environmental impact of packaging used when shopping for fashion online', by generation, 2022
- Young Gen Zs buy and share fashion on social media**
 Figure 55: Agreement with statements about online fashion shopping behaviours, by generation, 2022
- Ensuring online shopping is enjoyable**

FINDING THE CORRECT SIZE/FIT WHEN BUYING ONLINE

- Women find customer reviews most useful**
 Figure 56: Most useful tools to help with finding the correct size/fit when shopping online for clothes, 2022

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

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- **Developing accurate online fit tools**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

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

APPENDIX – FORECAST METHODOLOGY

- **Market forecast**
Figure 57: Best- and worst-case forecast for consumer spending on online fashion, 2022-27
- **Market drivers and assumptions**
- **Forecast methodology**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
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