

Womenswear - UK - 2022

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This report looks at the following areas:

- How will the cost-of-living squeeze impact the womenswear market?
- How womenswear is emerging from the disruption caused by COVID-19 and forecasts for recovery.
- How and where people have bought womenswear in the last 12 months and the growth in online purchasing.
- Changes in shopping priorities when buying womenswear in the last year.
- Attitudes towards shopping for womenswear and interest in the latest innovations.

Young women are prioritising clothing quality, with 63% of female 16–24s agreeing that this has become more important compared with 12 months ago. While these young women are still avid fast-fashion buyers, with 30% agreeing that fashion trends have become more important, they are gradually becoming more aware of the benefits of purchasing pieces that are well-made and that will last longer. 31% agree that it is worth paying more for items that you can resell.

While there has been a return to spending on clothes in the first quarter of 2022, helped by the resurgence of large-scale events such as weddings, consumers are facing a prolonged squeeze on their incomes due to high energy costs, rising food and drink prices, and record high inflation. Given that women are significantly more likely than men to feel concerned about their finances over the coming year, this will hit spending on a discretionary category such as clothing. This will dampen growth in the womenswear market, which Mintel estimates will only grow by 5% in 2022 to £31.6 billion.

Fashion retailers have already started to increase their prices, with many doing this selectively across some of their ranges, as they are being hit with increases in transport costs, energy and commodity prices, and considerable supply chain disruption, which has been exacerbated by COVID-19 and the Ukraine conflict.



"As the cost-of-living squeeze bites, women are becoming increasingly value focused when buying womenswear. While this will lead some consumers to prioritise price and trade down, for others it will become about the overall value equation."

- Tamara Sender Ceron,
Associate Director, Fashion
Retail

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As the cost of living squeeze bites, women are becoming increasingly value focused. While this will lead some consumers to trade down to value retailers and supermarkets, there are also opportunities for other types of retailer to attract shoppers by expanding their value proposition. It is important that fashion retailers focus on promoting overall value by improving the quality and durability of their clothes, as well as by looking at other factors that play a critical role in the buying decisions of their customers, such as free delivery, a seamless and convenient shopping experience, and a differentiated product offering, from a targeted own-brand to exclusive third party brands. Retailers can deal with rising costs in their businesses by making more sustainable choices such as becoming more energy efficient, buying recycled fabrics and using deadstock instead of letting it go to waste and reducing packaging.

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