

Childrenswear - UK - January 2010

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What is this report about?

The childrenswear market has recently passed through a difficult period. The twin effects of a slowdown in the UK economy and the strengthening presence of value retailers have had the effect of reducing market value. Although volumes have been rising in some areas on the back of discounting, the fact that not all retailers follow such a model has led to hard choices.

Despite such immediate pressures, interest in childrenswear remains high. Choice, quality and fashion can now be seen across the high street with the new wave of discount retailers focusing in particular on providing what has been traditionally offered by more established outlets and growing their share of sales.

What have we found out?

- In 2009, sales of childrenswear made a modest bounceback to £5 billion after falling in 2007 and 2008. The falls in recent years can be attributed to low-cost imports, the growth of low-price supermarkets and discounters, combined with the effects of the recent recession.
- The concept of value is well engrained in the childrenswear market. Twenty-five million people buy childrenswear from the supermarket – making them the leading outlet type for children's clothing - 11.5m adults buy from Asda and 9.5m from Tesco. In addition, 8.5m adults buy their children's schoolwear from supermarkets.
- Almost 13m people buy childrenswear from high street fashion stores. Next is the leading retailer in terms of value sales (11.5%) and has 8m childrenswear buyers.
- Because of the recession, almost 11m adults say they wait for the sales to buy childrenswear and 7.5m have traded down to less expensive stores. A significant 8.5m also buy just as replacement purchases. On a more positive note, 4.5m haven't changed their childrenswear shopping habits at all.
- Internet shopping is a growth area with Mintel estimating that around 12% of childrenswear sales are made through this channel (an estimated £600 million). Many established retailers now operate online although discounters are noticeably absent. Four million adults buy children's clothing on the internet.
- Ten million people enjoy the childrenswear shopping experience and 11m buy children's clothing as a gift. Gift shopping is particularly important among older people, ie grandparents, although incomes are tight for many in this group.

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