“The way people shop for fashion is changing and the distinction between online and offline is increasingly superficial as both channels are intrinsically linked, influencing one another. Online does continue to capture a greater share of the market year-on-year, but the argument remains that many online sales would not be possible without the presence of physical stores.”

– Samantha Dover, Senior Retail Analyst

This report looks at the following areas:

- Online vs offline in the British fashion industry
- Who are the real fashion influencers?
- Meeting the needs of an ever-more demanding consumer

Store-based retailers need to find new ways to harness the power of their high-street presence.
The Market – What You Need to Know

What you need to know

Products covered in this Report

Executive Summary

The market

Continued growth in the UK fashion industry

Figure 1: Consumer spending on clothing, footwear and accessories, 2014-24

Online set to account for a third of fashion spending

Figure 2: Online consumer spending on clothing, footwear and accessories, 2014-24

Companies and brands

Merging the offline and offline experience

Social media becomes integral to the purchasing journey

The consumer

Online equals store-based purchasing

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Stores influence online shopping, online influences store purchasing

Figure 4: What consumers did before they bought fashion in the last 12 months, April 2019

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Online vs offline in the British fashion industry

The facts

The implications

Who are the real fashion influencers?

The facts

The implications

Meeting the needs of an ever-more demanding consumer

The facts

The implications

The Market – What You Need to Know

Spending on fashion remains robust

BUY THIS REPORT NOW
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Ongoing shifts in where people are shopping
Rising technology usage influences shopping journey

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In-store technology merges online and offline
Aiding the online shopping journey
The evolution of personal styling
Launch Activity and Innovation

- The rise of alternative shopping channels
- Shopping gets social
- New ways to reward loyalty
- The reimagining of physical stores
- The line between online and offline continues to blur
- Additional services add value
- Localised store concepts
- Using online to drive footfall in-store
- Changes in the delivery and returns proposition
- Sizing and fitting technology continues to evolve
- Try before you buy gains momentum
- New ways to aid brand and product discovery
- Personal styling becomes more sophisticated

The Consumer – What You Need to Know

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Men more likely to look to celebrities

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Online shoppers more influenced by others

Almost a quarter get inspiration from more than one type of influencer

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Offering a range of delivery options is now integral

Women want easy returns, but retailers want women to return less

Finance options and delivery passes resonate with young shoppers

Reward schemes are a priority for in-store shoppers

Fashion Buying Behaviours

Most consumers don’t buy immediately

Search engines are key to discovery

CHAID analysis

Methodology

A demand for lifestyle-based fashion recommendations from fashion experts

The Perfect Shopping Experience

Methodology

Added value from customer service

Not so pushy staff

For some the store experience is everything...

...but for others the devil is in the detail online
A fit for everyone
Variety is the spice of life
A speedy service
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