

# THE GERMAN FASHION SHOPPER – GERMANY – 2024

Fashion brands/retailers must tactically merge online and offline strategies, boosting online presence and enhancing experiential retail to captivate consumers.



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# The German Fashion Shopper - Germany - 2024

## This report looks at the following areas:

- The economic situation in Germany, including the decline in GDP and consumer spending due to inflation
- The development and role of experiential retail
- The role of social media and social commerce in influencing consumer behaviour
- The current state of retail media in the German fashion sector
- Customer behaviour and preferences in the fashion market, with insights into the shopping journeys of different demographics
- A range of specific marketing strategies from different brands and initiatives



Fashion brands/retailers must tactically merge online and offline strategies, boosting online presence and enhancing experiential retail to captivate consumers.

## Overview

57% of German fashion shoppers bought fashion to feel good, a trend seen across generations. This highlights that **shopping for fashion goes beyond necessity** and results in 53% of German fashion shoppers thinking it is fun to buy fashion on impulse, despite the financial crisis.

However, rising prices are making shoppers **more price-conscious**, affecting online and in-store sales. Brands offering good deals and affordable prices will attract 79% of German fashion shoppers (87% of female fashion shoppers over 55) who consider using **promotional offers or discounts for fashion purchases** a great way to save money.

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At the same time it is **important for brands/retailers to keep up with emerging shopping behaviours**. 58% of Gen Z fashion shoppers in Germany look at social media for inspiration (vs 17% of Gen X) indicating a rise in social media as a key channel for fashion inspiration, marking an **urgent need for brands to adapt and optimise their online strategies**.

Enhancing retail media and **social commerce can push the fashion market in the coming years**. Despite being conscious about giving out data, German fashion shoppers also see its advantages. 34% of German fashion shoppers believe that **personalised fashion ads on social media facilitate the discovery of new brands** and products, with 20% finding them non-intrusive.

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## Report Content



### EXECUTIVE SUMMARY

- The five year outlook for the German fashion shopper

#### Market context

- Revival in consumer confidence and in-store preference
  - Graph 1: index of retail sales of clothing in real prices excluding tax, 2014-23
- As in-store retail rises, ecommerce falters
  - Graph 2: revenue development in clothing ecommerce in €m including VAT, not adjusted for inflation, 2015-24
- Shoppers prioritise affordability as brands pivot strategies
  - Graph 3: consumers who set a budget plan for buying fashion items in the past 12 months, 2024
- German consumers prioritise fashion spending
  - Graph 4: consumer plans to spend on clothing and accessories (including footwear), 2022-24

#### Mintel predicts

- In-store shoppers expect an emotional experience
- The online shopping journey will become increasingly frictionless

#### Opportunities

- Enhance physical shops with experiential retail
- Integrate retail media
- Invest in social commerce
- Build brand loyalty through value alignment
- Empower sales in the youth market through influencer partnerships

### MARKET DRIVERS

#### The German economy

- 2024 is expected to remain challenging
  - Graph 5: key economic data, in real terms, 2019-25
- The inflation rate is bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
  - Graph 6: financial confidence index, 2022-24
- The impact of the economy the fashion sector

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## Consumer confidence

- The fashion sales surge for clothing specialists continues into 2024
  - Graph 7: index of retail sales of clothing in real prices excluding tax, 2014-23

## eCommerce

- Navigating the transition in fashion retail
- In-store retail makes a comeback as fashion ecommerce dips
  - Graph 8: online retail sales, clothing, 2014-23
- Check company strategies against ecommerce revenue development

## Social commerce

- Master social media experiences
- Social media will become increasingly shoppable
- Watch the development of social media features
- Align fashion marketing with age-specific platform preferences in Germany

## Spending confidence

- Fashion is a key spending priority for young women
  - Graph 9: consumers who would typically spend discretionary money on clothes/shoes/accessories, 2024
- The majority of fashion spending happens at specialists
  - Graph 10: estimated distribution of spending on clothing and footwear, 2023
- Support consumers to confidently invest in their style
  - Graph 11: consumer plan's to spend on clothing and accessories (including footwear), 2022-24

## WHAT CONSUMERS WANT AND WHY

### Who they buy fashion for

- Fashion is primarily a personal purchase
  - Graph 12: who consumers bought fashion for in the last 12 months, 2023
- Cater to modern family dynamics
  - Graph 13: who consumers bought fashion for in the last 12 months by age of children, 2024
- Inclusive shopping for parents and kids
- Encourage partners to express connection through fashion
- Develop strategies to celebrate child-free lifestyles
  - Graph 14: consumers who bought fashion for their partner by lifestage in the last 12 months, 2024
- Brax' campaign shows power couple
- Fashion-gifters are most likely to spend more on clothes in 2024
  - Graph 15: plans to spend on fashion in 2024, by person fashion was bought for in the last 12 months, 2024

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## How fashion is purchased

- Men are more likely than women to shop instore
- Empower the modern male shopper
- Navigate the dynamic female shopper
- Aim for online excellence and experiential retail
  - Graph 16: methods of purchasing fashion in the last 12 months by generation, 2024

## How much they spend

- Spending is fairly consistent online and instore
- Meet consumers' financial sweet spot
- Cater to high-spending youngsters with an expansive product selection...
- ...and luxury capsule collections

## Sources of inspiration

- Aspire to inspire consumers across channels
- Adjust communication strategy to fit the target group
  - Graph 17: sources of inspiration for fashion purchases in the last 12 months by generation, 2023
- How to target different generations – from brochures to social media
- Streamline fashion inspiration
  - Graph 18: repertoire analysis of sources of inspiration by gender and age, 2023
- Harness peer power with user-generated content

## Fashion-buying behaviours

- Leverage the feel-good-factor of fashion shopping
- Highlight emotional benefits on social media
- Patagonia tells stories about the joy and satisfaction of reuse
- Stimulate spontaneous, emotional purchasing decisions
- Engage with Millennials through custom inspiration strategies
- Target Millennials through user-friendly innovations
- J. Crew launches virtual closet for Apple Vision Pro
- Tap into the desire for an emotional uplift with retail media
- What is the definition of retail media?
- What retail media includes
- Respect different generations' views on privacy
  - Graph 19: attitudes towards personalised fashion adverts on social media by generation, 2023
- Address high earners with retail media that facilitates their online shopping
- 16-34 year olds show the greatest interest in influencers
  - Graph 20: consumers who purchased a fashion item advertised by a social media personality in the past 12 months, 2024

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- Leverage the power of influencers in online media
- Paid influencer collaborations are perceived positively

## Attitudes towards purchasing fashion

- Germans fashion shoppers love a deal
  - Graph 21: attitudes towards purchasing fashion, 2024
- Blend online engagement with value-driven fashion offers
  - Graph 22: attitudes towards purchasing fashion, 2024
- Turn prudent spending into loyalty programme engagement
  - Graph 23: consumers who set a budget plan for buying fashion items in the past 12 months, 2024
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- Attract parents with a wider product range

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- In-stream shopping with GZSZ and Zalando
  - Graph 25: sources used to watch video content in the last three months (NET), 2022
- Mytheresa embraces technological innovations...
- ...for an immersive luxury shopping experience
- Breuninger starts retail media
- Crocs x Simone Rocha
- Highsnobiety opens first shop in Berlin
- Arket offers a wide variety...
- ...and external brands in second Berlin location
- Bershka embraces experiential retail

## Advertising and marketing activity

- Fashion against Nazis
- Balenciaga's Closet SS 24 Campaign
- Takko promotes affordability
- Adidas leverages football enthusiasm for marketing campaign
- Louis Vuitton leverages Olympic powers

## APPENDIX

### Appendix – abbreviations, consumer research methodology and language usage

- Consumer research methodology
- A note on language
- Infegy Atlas
- CHAID analysis
- CHAID analysis methodology
- Abbreviations
- Generations



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