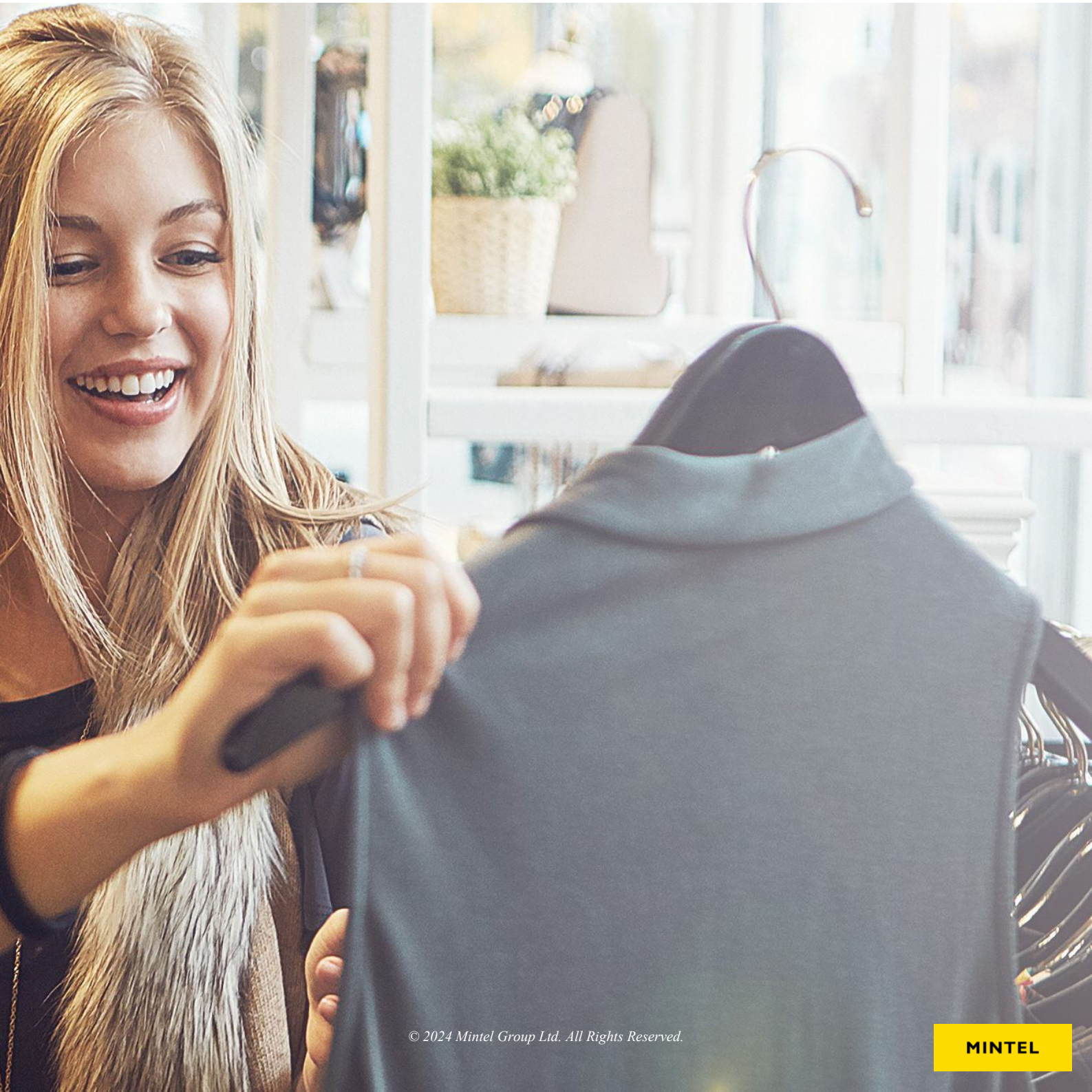


WOMENSWEAR – GERMANY – 2023

In a tough economy, it is crucial to motivate consumers to spend by highlighting the joy of shopping and focussing on timeless and sustainable clothing ranges.



Silke Lambers, Fashion
Senior Research Analyst,
Germany



Womenswear - Germany - 2023

This report looks at the following areas:

- How the cost-of-living squeeze is impacting the womenswear market
- Changes in shopping priorities when buying womenswear in the last year
- Who is buying womenswear and what types of clothes are being purchased
- How and where people have bought womenswear in the last 12 months
- Understanding and establishing purchase drivers for womenswear
- Analysing attitudes and behaviours towards the purchasing of womenswear
- Innovations in womenswear purchasing including the use of technology, sustainable ranges and brand image



In a tough economy, it is crucial to motivate consumers to spend by highlighting the joy of shopping and focussing on timeless and sustainable clothing ranges.

Overview

There has been a significant shift in the world of women's fashion shopping, as **80%** of female shoppers **prioritise buying longer-lasting clothing**. Instead of following short-term fashion trends, they seek higher-quality items. Almost **half of womenswear** shoppers believe **seasonality in fashion has diminished**, reflecting a growing focus on sustainability and longevity.

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In the year to March 2023, **65%** of **women reduced their fashion purchases due to the cost-of-living crisis**, making budget control a priority. This pressure on women's budgets is particularly evident, as **more women** than **men** have curbed impulse purchases.

Women have faced tougher financial situations than men, leading them to reduce how much clothes they buy. Additionally, as women age, **their fashion spending declines**, particularly among seniors, due to limited collections catering to older demographics, which impacts their purchase behaviour.

Fashion continues to be a **significant form of self-expression**, particularly for female Gen Z shoppers (**73%**) and will drive the market forward. **Sustainability's growing importance** leads to a trend of mixing new fashion with vintage pieces or visibly repaired garments, with **34%** of Gen Z women planning to repair clothes in the future. While currently seen in niches, this trend is expected to move to the mainstream.

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Report Content



EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for womenswear

Market context

- Sluggish growth in textiles, clothing, shoes and leather goods in H1 2023
 - Graph 1: turnover in retail sale of textiles, clothing, footwear and leather, 2022-23
- Online channel suffering after the pandemic is wearing off

Mintel predicts

- Consumer spending on women's clothing expected to continue to grow slowly after the post-pandemic boost
- The womenswear industry is suffering under the current economic situation
 - Graph 2: women's spending on clothing and accessories (including footwear) compared to the last 12 months*, 2022 and 2023
- Spending on womenswear is expected to slow down after post-pandemic rise
 - Graph 3: final consumption expenditure of households at current prices for clothing, 2013-23
- Market size & forecast

Opportunities

- Build consumer trust and attract womenswear shoppers with sustainability as a key driver
- Help women control their budgets
- Emphasise longevity and introduce high-quality timeless classics
- Focus on fun, playfulness and optimism in times of crisis
- Foster identification through social media
 - Graph 4: percentage of women who have bought womenswear for themselves in the past 12 months and find fashion a visual form of self-expression, 2023
- Address Gen Z by offering gender-neutral clothing
- Introduce new technology in fashion shops
- Establish a profitable second-hand strategy
- Target overlooked older customers
- Make consumer loyalty playful
- Address young women with diverse offerings

MARKET DRIVERS

The German economy

- Stagnation follows a technical recession
 - Graph 5: key economic data, in real terms, 2019-24
- Continuously high inflation shapes consumers, brands and the economy...
- ...impacting financial wellbeing...
- ...confidence and consumer expenditure

The impact of inflation in womenswear

- Clothing retail turnover grows faster than retail turnover overall
- Inflation will keep the clothing market on tenterhooks
 - Graph 6: retail price index for retail sales of clothing retailers (EHPI), excl. value tax, 2019-2023
- The fashion industry is suffering in the current economic situation
 - Graph 7: spending on clothing and accessories (including footwear) compared to the last 12 months*, 2022 and 2023

Ageing society

- Germany is expected to transition into a super-aged society
 - Graph 8: old-age dependency ratio with moderate net migration*, 2020-35

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- Women's financial situations recover sluggishly
 - Graph 9: financial situations of women, 2022-23
- Women face higher financial risk compared to men

A shift in the perception of gender

- Extend fashion ranges for the post-gender society

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- Sustainability is a key driver of the future for young consumers
 - Graph 10: female consumer behaviour in relation to sustainable clothing shopping, by age group, 2022
- Circular fashion is the goal of the sustainability agenda

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Sector size and forecast

- Consumer spending on women's clothing increased once pandemic restrictions were lifted
- Spending on womenswear slows after post-pandemic rise
 - Graph 11: final consumption expenditure of households at current prices for clothing, 2013-2023
- Fashion remains important for women

Channels of distribution

- German online clothing sales hit hard by the cost-of-living crisis
- Specialists and online retailers are key channels for womenswear

WHAT CONSUMERS WANT AND WHY

What they buy

- Gen Z women are the most engaged fashion shoppers
- Connect to Younger Millennials with collections that transcend binary fashion concepts
 - Graph 12: types of fashion bought for themselves, by generation, 2023
- Test gender neutral fashion in capsule collections

How they buy

- Link channels because women are omnichannel shoppers
 - Graph 13: channels shopped at for clothing, 2023
- Brands should improve their smartphone shopping channel to reach young consumers
 - Graph 14: fashion shoppers who have shopped online by smartphone, by age, 2023

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- Online and mid-market fashion retailers dominate the German womenswear market
 - Graph 15: types of retailers shopped at for clothing in the last 12 months, 2023
- Monetise wealthier women's tendency to shop at more retailers...
 - Graph 16: repertoire of number of retailers women shopped with by net-household income, 2023
- ...especially if you are one of these retailer types
 - Graph 17: retailers from which consumers purchased womenswear in the past 12 months, by income, 2023

Money saving strategies when shopping for womenswear

- Unleash women's money saving strategies and help them through the crisis
 - Graph 18: behaviour towards shopping for clothing, 2023
- Prevent consumers from turning to competitors by integrating cheaper ranges
- Help Gen Z women manage their fashion budgets in times of crisis
- Profit from the trading-up trend by introducing timeless, high-quality capsule pieces
- Communicate the quality of garments to women who shop at higher-priced retailers
- Create a modern second-hand strategy
- Highlight repairs as a method to extend the lifetime of garments

Appealing in-store factors

- Discover strategies to lure consumers back to physical retail
- Become more size-inclusive

Womenswear – Germany – 2023

- Invite consumers to stores with exclusive offers
- Entice young consumers with easy shopping self-check-outs...
- ...and automated in-store services
- Cater to young consumers by extending categories

Interest when shopping for clothing

- Boosting customer loyalty and enhancing transparency are key strategies for success
- Create tier-based loyalty schemes to reward customers
- Implement traceability to enhance credibility with customers
- Invest in intuitive virtual fitting technologies...
- ...to help female fashion shoppers to find the right size
- ...to help female fashion shoppers to find the right size

Attitudes towards shopping for clothing

- Women find fashion shopping fun, but they desire greater trust in the retailers they shop from
 - Graph 19: attitudes towards shopping for clothing, 2023
- Communicate sustainability openly and clearly
- Create enjoyable shopping experiences to engage young women
 - Graph 20: interest in fashion shopping as a fun activity, by age group, 2023
- Empower individual self-expression by social media interaction
- Connect positively with older target groups
- Loosen up business wear with casual cuts and comfortable materials

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Leading retailers

- Otto Group reports pre-tax loss for the first time in eight years
- Zalando fights crisis' effects
- About You reaches profitability for the first time
- Hugo Boss achieves its second record year in a row
- Leading retailers
- H&M lawsuit reveals the growing threat of ultra-fast fashion platforms
- Shein pushes the rise of real-time fashion

Retail innovation

- Snapchat launches a virtual dressing tool in Germany
- Zalando integrates generative AI
- Zalando's virtual fitting room and sizing tools are meant to reduce returns
- Bonprix explores smartphone shopping experience in physical retail

- P&C rethinks department store concept with conscious-fashion stores
- About You cooperates with Momox
- Tchibo starts second-hand business with Sellpy
- Inditex announced a bold sustainability strategy
- Gucci launches a circular hub
- Breuninger opens in Munich

Advertising and marketing activity

- Barbiecore trend sets optimistic, pink highlights
- Pharrell Williams creates positive vibes for Louis Vuitton
- Armedangels fights for equality with limited-edition socks
- Zalando launches a capsule collection in collaboration with Paco Rabanne
- Uniqlo strengthens consumer connection by introducing in-store repair workshops
- H&M empowers consumers with clothing repair education

APPENDIX

Appendix – products covered, abbreviations and consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Generations
- Consumer research methodology
- A note on language

Appendix – market size and forecast

- Forecast methodology
- Forecast methodology – fan chart
- Market forecast and prediction intervals – value
- Market forecast at real and current prices – value

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