

WOMENSWEAR – UK – 2024

While women have adopted more savvy shopping behaviours, they are still buying clothes, with half of females shopping for fashion to enhance their mood.



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Womenswear - UK - 2024

This report looks at the following areas:

- The short-, medium- and long-term impact of the cost-of-living crisis on womenswear purchasing
- What clothes sizes women buy and attitudes to sizing and fit when shopping
- How retailers can drive more frequent shopping and interest in online fit technology and the use of AI for recommendations
- Women's changing clothes shopping behaviours including the rise of resale, interest in quiet luxury and interest in sports collaborations

Overview

The cost of living crisis has led to caution around spending and while women have adopted more savvy shopping behaviours, they have turned to fashion to boost their mood. As inflation rates fall and consumer confidence increases, there are opportunities for fashion to trade on mood-boosting demand, drawing lessons from the success seen in the health and beauty sector.

While in-store shopping has seen an upward trend since the end of the pandemic, it has not returned to pre-Covid levels. Retailers need to do more to entice women back to stores by making them more experiential and by using the latest technology to ensure a more convenient and seamless shopping journey.



While women have adopted more savvy shopping behaviours, they are still buying clothes, with half of females shopping for fashion to enhance their mood.

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Major sporting events such as the Paris Summer Olympics 2024, which will be the first to have gender parity in terms of athletes competing, present big opportunities for sport's brands to boost engagement by young women in sport through improvements in their sizing and product ranges.

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Report Content

EXECUTIVE SUMMARY

Opportunities for the Womenswear market

- Sports brands can promote gender parity at Olympics
- Gap in the market for 'quiet luxury' clothes in larger sizes
- Using technology to improve fit and reduce returns

Market dynamics and outlook

- Market size & forecast
- Market predictions
- Consumer spending on womenswear to rise 4.7% by 2024
- Clothing inflation remains high
 - Graph 1: overall CPIH, garment CPIH and garment by gender CPIH % change, 2023-24
- Three in five women overweight or obese
 - Graph 2: prevalence of overweight and obesity, by gender, by age group, 2021

What consumers want and why

- In-store shopping fails to return to pre-pandemic levels
 - Graph 3: how women bought clothing in the last 12 months, 2020-24
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 - Graph 5: clothing sizes women typically buy, 2024
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 - Graph 6: attitudes towards women's clothes and clothes purchasing, 2024
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 - Graph 7: factors that will encourage women to shop more frequently for clothes, 2024
- Three in five women like to shop for discounted clothes...
 - Graph 8: clothes shopping behaviours, 2024

Retailer activity

- Clothing retailers extend size offer

MARKET DYNAMICS

Market size

- Consumer spending on womenswear grew 4.2% in 2023 to £32.2 billion

- Graph 9: consumer spending on womenswear, 2018-23

Market forecast

- Consumer spending on womenswear to rise 4.7% by 2024
- Consumer spending will normalise
- Value retailers were the main beneficiaries of the last income squeeze
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- Clothing inflation remains high
 - Graph 11: overall CPIH, garment CPIH and garment by gender CPIH % change, 2023-24
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 - Graph 17: prevalence of overweight and obesity, by gender, by age group, 2021

WHAT CONSUMERS WANT AND WHY

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 - Graph 18: fashion items women have purchased in the last three months, 2024
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 - Graph 19: clothing items women have purchased in the last three months, 2024
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 - Graph 20: amount spent on clothing items on last shopping trip, by gender, 2024
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 - Graph 22: clothing purchasing in the last 12 months, by generation, 2024

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 - Graph 24: how women bought clothing in the last 12 months, 2024
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 - Graph 28: types of retailers where women bought clothing in the last 12 months, 2024
- Increase in popularity of pureplays
 - Graph 29: types of retailers where women bought clothing in the last 12 months, 2020-24
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 - Graph 32: clothing sizes women typically buy, 2024
- Size 12 is the most popular clothing size
 - Graph 33: clothing sizes women typically buy, 2024
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- Women less likely than men to feel good in the clothes they buy

- Graph 36: attitudes towards women's clothes and clothes purchasing, 2024
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 - Graph 37: agreement with clothes not fitting negatively impacts my self-esteem, by generations, 2024
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 - Graph 38: agreement with buying clothes to flatter my body shape, by gender and age, 2024
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- Help larger sized shoppers with better in-store clothing size availability and more consistent sizes
 - Graph 41: factors that will encourage women to shop more frequently for clothes , by type of clothes size shopper, 2024
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 - Graph 43: factors that will encourage women to shop more frequently, by household income, 2024
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Clothes shopping behaviours

- Three in five women like to shop for discounted clothes...
 - Graph 45: clothes shopping behaviours, 2024
- ...and young women are more likely to adopt this behaviour
 - Graph 46: agreement with waited to buy clothes until they were discounted, by age group, 2024
- Tapping into the quiet luxury trend
- Half of women buy fewer but better quality clothes
- The 'quiet luxury' trend
- Women bought clothes to enhance their mood
 - Graph 47: agreement with buying clothes to enhance the mood in the last 12 months, by generations, 2024
- Affluent females buy beauty/personal care products from fashion retailers...
 - Graph 48: agreement with buying beauty/personal care products from a fashion retailer in the last 12 months, by household income, 2024

- ...and more likely to use a fashion retailer's loyalty scheme
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- One in three women buy sports clothing from a fashion retailer
- Affluent women adopt sustainable shopping behaviours
 - Graph 50: shopping behaviours, by household income, 2024

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Brand research

- M&S stands out as the favourite brand
- M&S draws younger shoppers, but still skewed to customers over-55
- M&S is viewed as the most trusted and diverse
- Shein and Temu usage rises
- Vinted competes with Primark for value and innovation
 - Graph 51: attitudes towards selected brands, 2024
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 - Graph 52: brand personality - macro image of selected brands, 2024
- Phase Eight is expensive

Launch activity and innovation

- Clothing retailers extend size offer
- JD Williams adds premium collection
- Rixo collaborates on range in inclusive sizes
- New collaborations
- Retailers tap into inclusivity
- Selfridges launches in-store 'Swap Shop'

Advertising and marketing activity

- Womenswear advertising spend continues to decline
 - Graph 53: total above-the-line, online display and direct mail advertising expenditure on women's fashion, 2020-23
- M&S is the top ad spender in 2023
- M&S continues to evolve its style perception in AW23 womenswear ad campaign...
- ...and maintains this in its Spring 2024 campaign
- Digital dominates ad spend, with TV and outdoor spend increasing
 - Graph 54: total above-the-line, online display and direct mail advertising expenditure on women's fashion, by media type, 2020-23
- JD Williams encourage midlife women to become confident with their fashion style
- ASOS opens first pop-up store
- Simply Be calls out bad fit with 'Serious About Shape' campaign

APPENDIX

Market forecast data and methodology

- Market forecast and prediction intervals (value)
- Forecast methodology

Report scope and definitions

- Market definition
- Abbreviations and terms

Methodology

- Consumer research methodology
- Nielsen Ad Intel coverage
- Infegy Atlas

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