Buyers' Debrief: Womenswear A/W 22/23

The merging of smart and casual apparel continues, with tailoring leaning towards business-casual aesthetics, while an appetite for comfort-led partywear becomes apparent. A blend of data-sets informs this analysis of A/W 22/23 assortments, pointing towards opportunities to jump on for future seasons

Punam Osan and Ana Cano
02.21.23 - 15 minutes

Urban Outfitters

Key takeaways

Top lessons learnt from A/W 22/23:

1. **Decrease SKUs:** the new-in apparel product count increased by 14% (UK and US), however growing volumes have not been reflected in sales, with performance remaining below average compared to prior years. Both regions saw new-in OOS rates decrease and new-in markdowns rates increase YoY

2. **Dress volumes need work:** dresses continue to grow share YoY, but out-of-stocks suggest a further reduction or rebalance of styles is required. Although new-in OOS rates were the highest across apparel, they also saw a rapid decrease YoY (-7.5ppt to 7.9% UK, -6.6ppt to 9.9% US)

3. **Opportunities for intimates:** the only category to see a decrease in new-in markdowns (-3.7ppt to 22% YoY UK). Update designs for new flexible lifestyles. Camisoles and corsets/bustiers performed well, suggesting a fresh direction for intimates

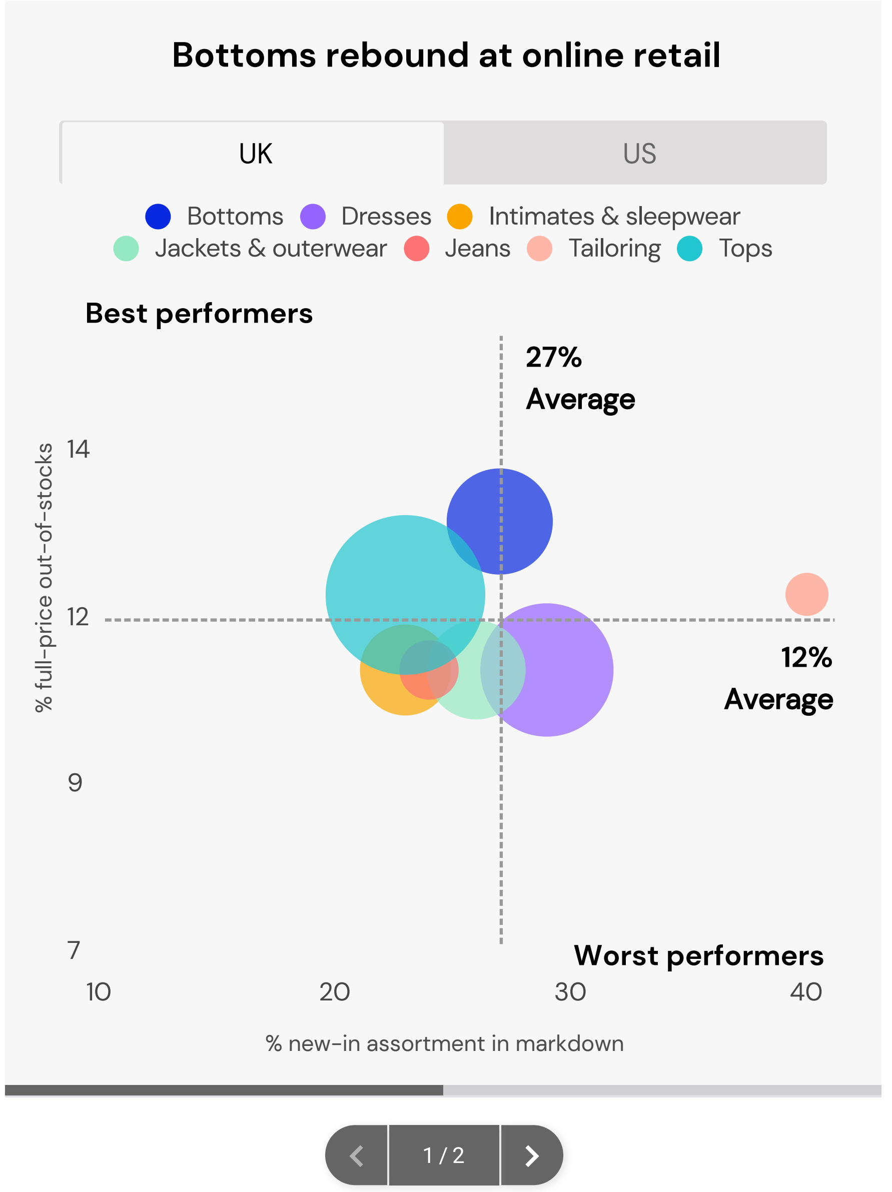
4. **Relaxed shapes win:** in each product category, best-performing styles included the likes of looser sweater and dress fits and wide-leg trousers, along with items suited for layering and multiwear

Slip dress
Top performer

Tank top
Top performer

Cargo trousers
Top performer

Blazer
Top performer

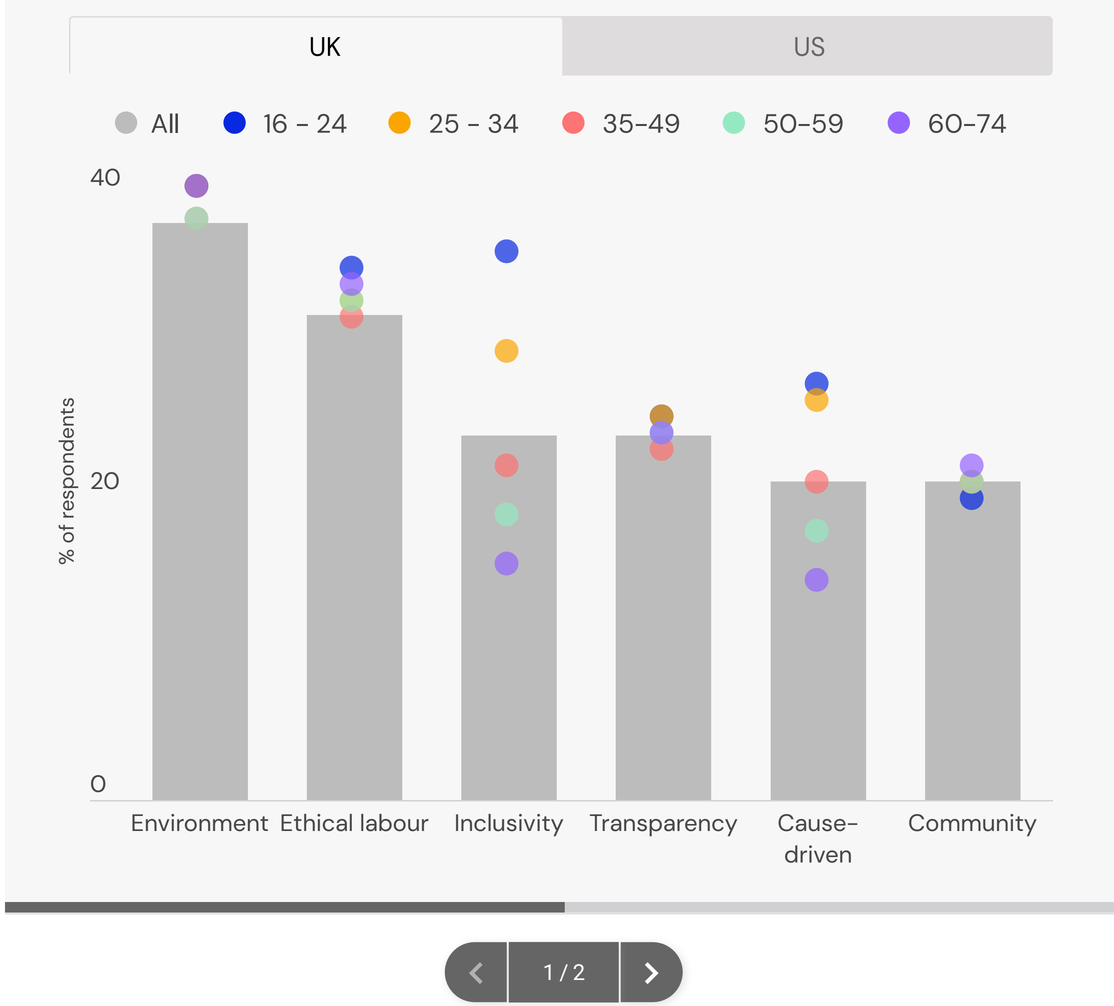


WGSN e-commerce. Data collected from UK and US retailers from August – December 2022

Purchase-drivers

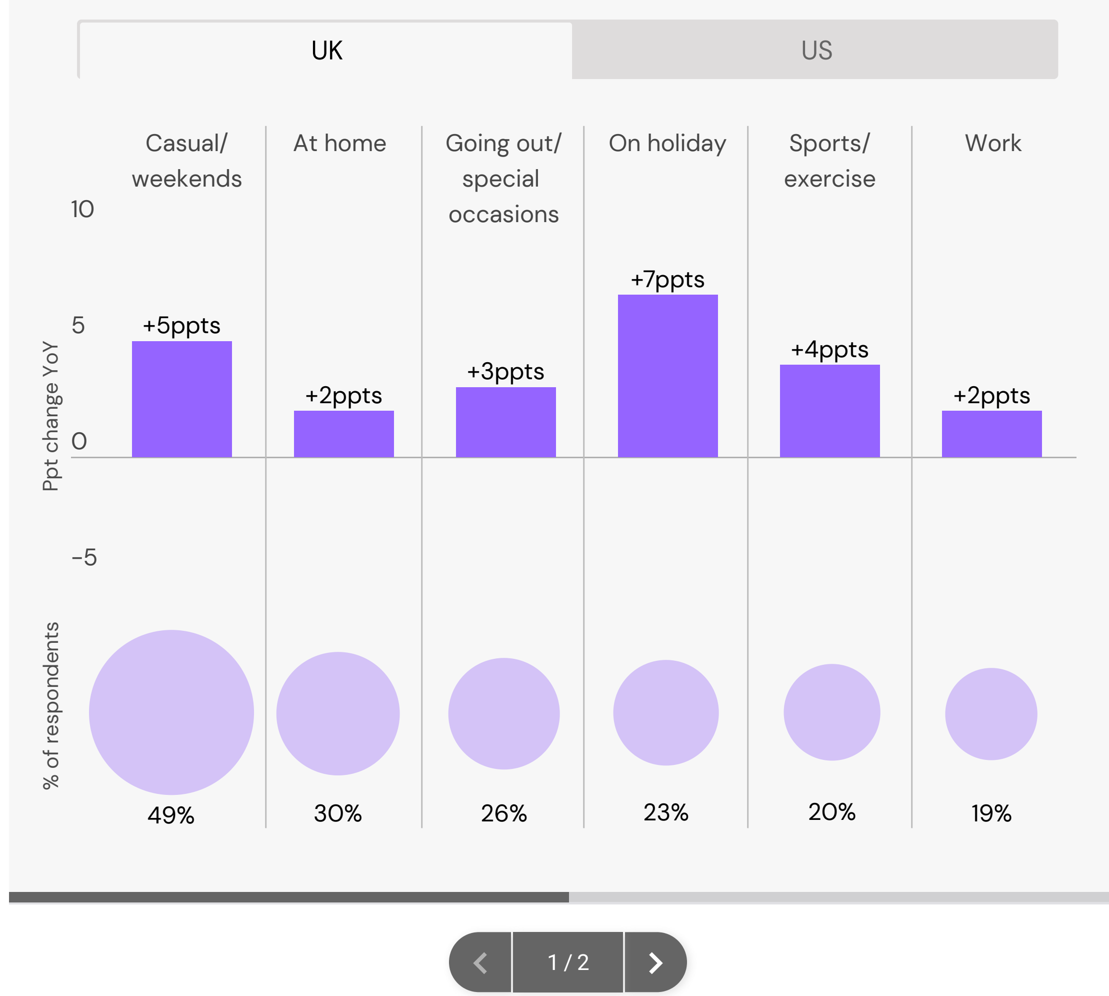
After plateauing last season, exercise returns as a key growth-driver. A return to the office spurs growth for work-appropriate apparel in both regions; UK consumers see a spike in travel purchases YoY. Sustainability is a greater concern for UK consumers, especially for those aged 50+. Gen Z acknowledges inclusivity and cause-driven brands as top drivers in both regions.

Most important CSR initiatives by age group in A/W 22/23



WGSN Barometer. UK and US, 26 weeks to December 31, 2022 and 2021. Q: Which of the following issues/initiatives are the most important when making a decision to purchase clothing, footwear or accessories?

Going on holiday remains a key purchase-driver in A/W 22/23



WGSN Barometer. UK and US, 26 weeks to December 31, 2022 and 2021. Q: When did you imagine wearing the items you were looking at?

Partywear

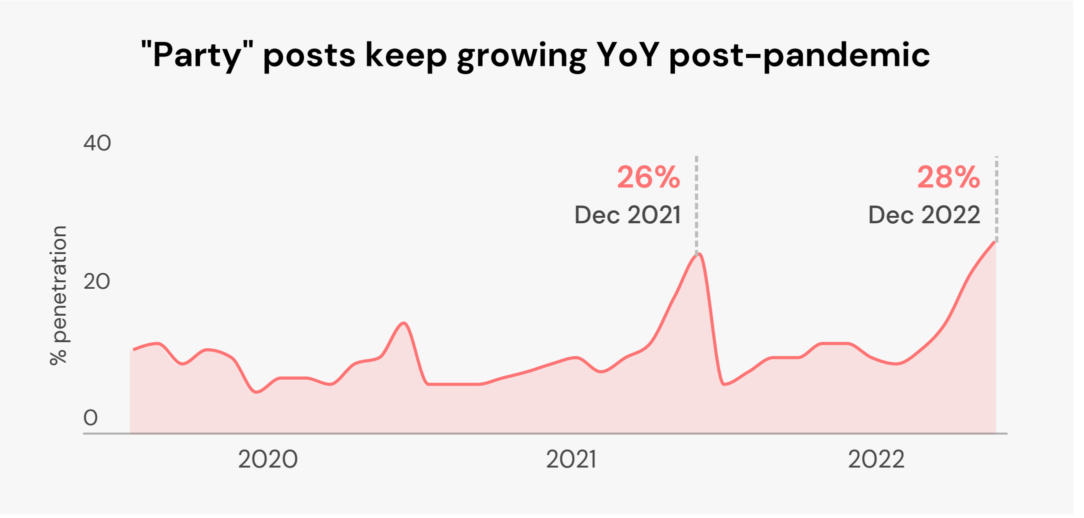
Dresses remain the largest shareholder, but will need to make room for refreshed party styles.

Alternatives for sequins: although sequins are growing YoY +2% (to 5% of the dresses mix), retailers brought in the likes of satin or damask as an addition to embellished dresses. Traditional party styles remain important, but should be scaled back accordingly as consumers begin to opt for multipurpose evening and special occasion outfits as well

Partywear suits: tailoring styles described as party/evening were the lowest percentage sitting in discount across tailoring (19.4% vs 25.4%, UK and US combined). The mix-and-match properties of suit sets prove to be popular amid the current buying-less culture

Minimalist dress designs: retailers should prepare to accommodate for stories such as Modest #ModernOccasion and #Gothlite, providing inclusive partywear to take share from sequin dresses. Incorporating #DrapingDetails or adding lace or shimmer and sheen textures will keep the party essence and remain relevant for A/W 23/24

Monsoon



WGSN Social Media

Mango

Tailoring styles described as work/office see rapidly increasing markdowns YoY (+15ppt to 30%, UK and US combined), the opposite of evening/party tailoring

H&M

River Island

WGSN

Tops and knitwear

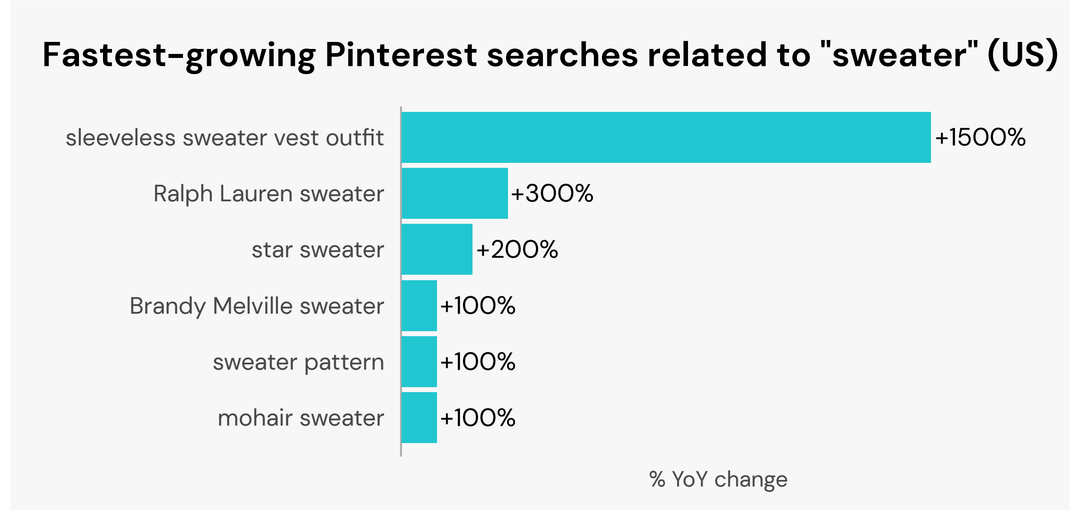
Jersey and knit tops outperform the declining woven top, as comfort remains a top purchase driver.

Sweater vests return as a good performer: tapping into #ModernAcademia, this style had the highest new-in OOS rate, and saw new-in markdowns decrease (UK: OOS 7.8%, MD 22.6%, US: OOS 4.8%, MD 20.6%)

Knitwear over woven tops: in line with our 2023 womenswear design priorities, home in on woven styles with versatile qualities, while maintaining a decline in volume. Knit tops showed good performance and offer a #ComfyParty solution for occasions, or a #RelaxedFormal look when paired with tailored trousers. Look to one of our key details for 2023, cosy texture, for design ideas

The tank top: the fashion tank continues to be a key item, and with higher-than-average new-in OOSs and lower-than-average MDs (UK: OOS 6.6%, MD 21%, US: OOS 7.7%, MD 13%), the item will be key for #ElevatedBasics and #YouthEssentials

Knit tops showed good performance, with above-average new-in out-of-stock rates in the UK and US and lower-than-average new-in markdown rates (UK: OOS 7.1%, MD 16.8%, US: OOS 6,8%, MD 16.1%)



Pinterest. US, October - December 2022 vs 2021

The military/utility shirt performed well in the US with new-in OOSs 7.3% and new-in MDs 14.5%

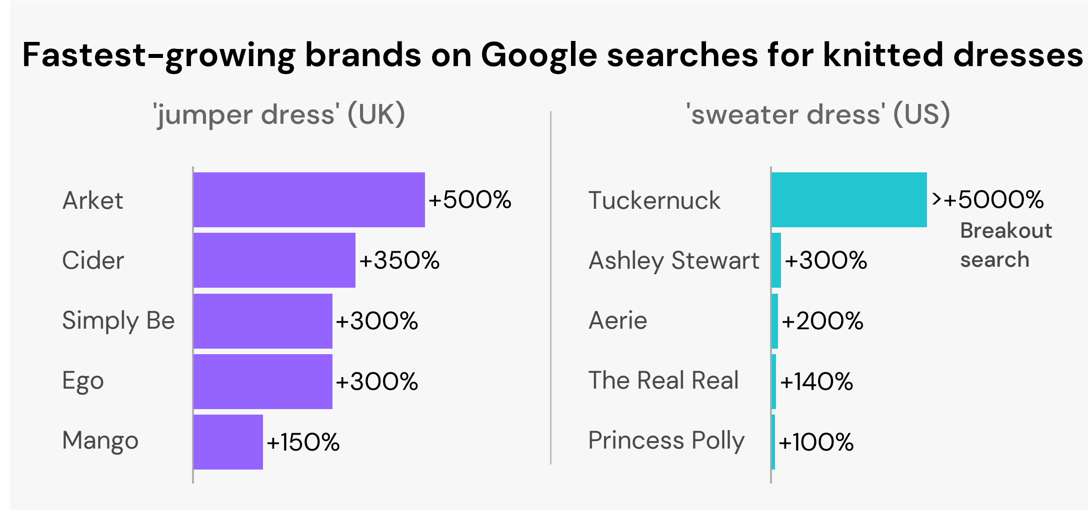
Dresses

As one of the best-performing categories in apparel for A/W 22/23, top-performing styles align to relaxed silhouettes.

Top performers: in line with comfort-driven and #Minimalist trends, top-performing styles included jumper/sweater, shift and slip dresses. These styles tap into #RelaxedFormal and #BusinessCasual, top trends for 2023.

Gaining market share: dresses saw large YoY growth in the apparel mix, increasing share by 1.5ppt to 21.9% (UK) and +2.5ppt to 19.2% (US). However, higher markdowns on new-in dresses (UK) suggest stripping back on SKUs, ensuring no two items are doing the same job. Look for hybrid design ideas such as the bleisure dress and beach-to-bar dress.

Loosen up dress fits: as the biggest shareholder of apparel, fresh ideas for dresses emerge. The travelwear opportunity opens up #ModularDesign dresses for commuters and travellers, while the workleisure dress incorporates office and social culture.



Google Trends. UK and US, January - December 2022

For a slip dress update, the boudoir dress is a key item for A/W 23/24

Skirts

As seen on WGSN's TrendCurve+, the mini and maxi will share an equal mix of the skirts market.

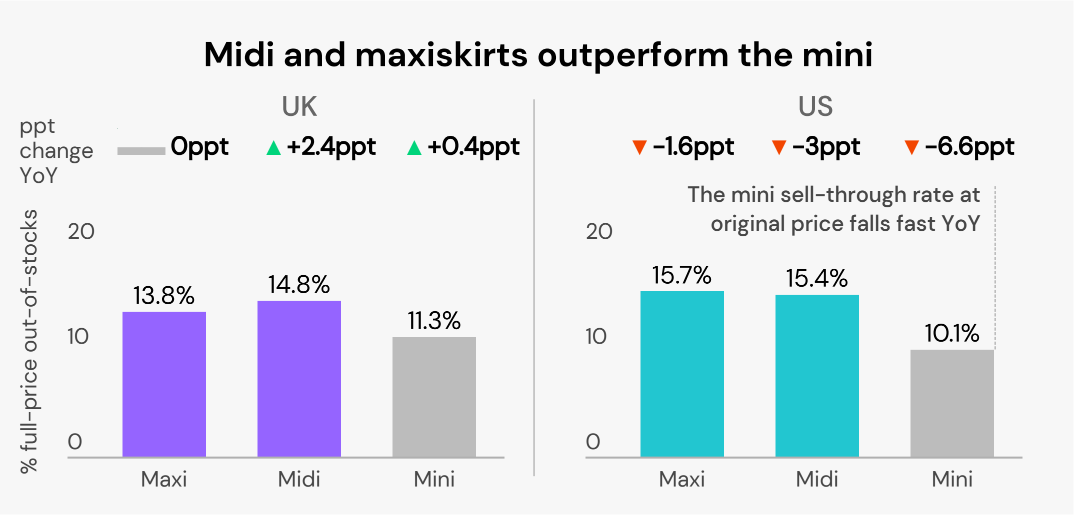
Be cautious on miniskirt volumes (US): this trending skirt length has gained share of the skirt mix in the US (+9ppt YoY to 43% of new-in skirts) but performance doesn't follow suit, with low full-price OOSs at 9%. Rebalance ranges to include a midi option, or test midi/maxi lengths.

Keep the mini on-trend: although the miniskirt remains an investment item in our Collection Review, retailers are reminded to design wearable minis for their consumers, playing into core stories such as #Utility or #TheGreatOutdoors. Alternatively, pairing with a selection of trending hosiery for A/W styling, or tapping into the youth market via a #GothLite narrative will help direct to the suitable consumer.

Maxiskirts will be key: this style proved to be a bestseller in both regions (FP OOSs 10% UK, 12% US), as a commercial alternative to the miniskirt. The maxiskirt has many directions to go into, including #RelaxedFormal, or an update to S/S 23's column skirt.


Urban Outfitters

In the UK: new-in miniskirts decreased (-3ppt YoY to 29%), while full-price out-of-stocks were on a par with midiskirts at 9.5%



WGSN e-commerce. Data collected from UK and US retailers from August - December 2022


Samsoe Samsoe

Tap into modern academia for refined miniskirts suitable for office and social


Zara


Urban Revivo

WGSN

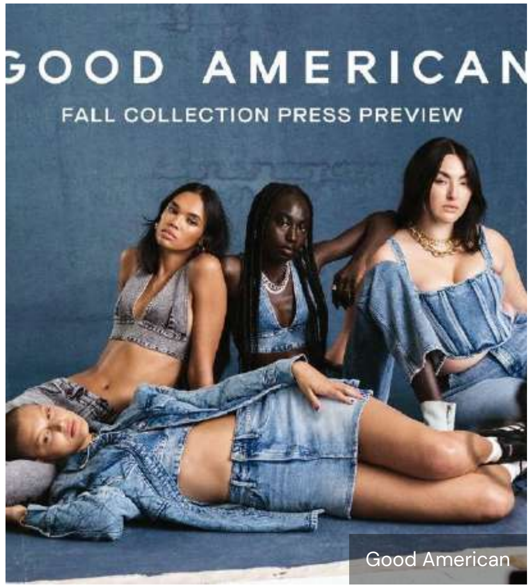
Denim

The trending decades of #90sGrunge and #Y2K remain popular with denim.

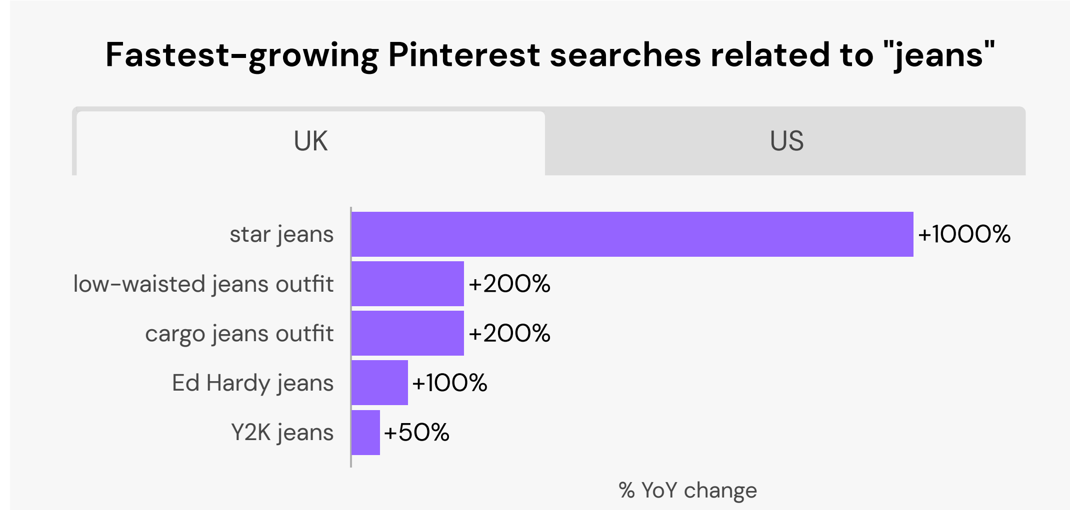
Play into looser fits: bottomweights experienced better performance for straight and wide-leg fits, with similar results showing for denim. Chore jackets and cargo bottoms play into #ElevatedUtility trends. Utility jeans grew by 3ppt to 4% (UK) of the new-in jeans mix.

A good place to start for circular design: many retailers used 2022 to launch sustainable denim practices, emphasising the use of recycled cotton, which grew 4ppt YoY to 10% of new-in jeans (UK) and 3ppt to 10% (US). Retailers should continue on this path, encouraging circular design with restore and repair services, playing into the catwalks Pre-Fall 23 trend #DenimOnDenim.

Y2K is still influencing denim: star motifs and cargo jeans are just a couple of popular searches for #Y2K-inspired denim. Additionally, low-rise jeans see YoY growth of 2ppt (UK) and 1ppt (US) to 4% of the new-in jeans mix, with a best performance in the UK across waist rises.



Good American



Pinterest. UK and US, October - December 2022 vs 2021


Urban Outfitters

Denim skirts remained stable at 5% (UK) and decreased by 1ppt to 6% (US) of the new-in skirts mix


River Island

Denim jackets have been stable at 4% (UK) and decreased by 1ppt (US) of the new-in outerwear mix


Stradivarius

Activewear

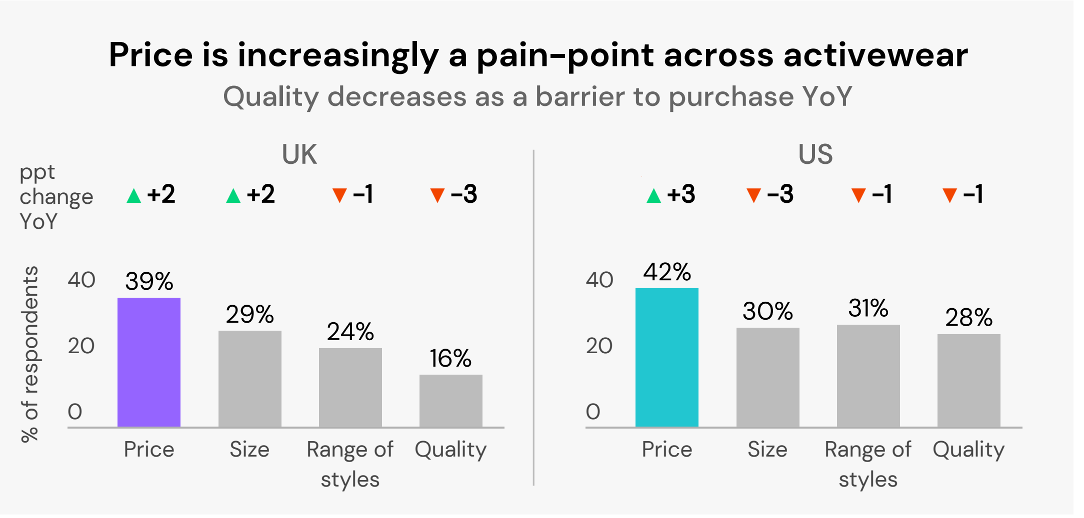
As active styles integrate into trendy high street retailers, consumers rethink how much to pay for active apparel.

Mid to low-impact bras: the product mix shows high-support bras are declining in favour of light and medium support options, which are gaining importance in-store and online. See our A/W 23/24 Women's Active Apparel Core Item Update for ways to incorporate trending #Cutout and #Corsetry details into active tops.

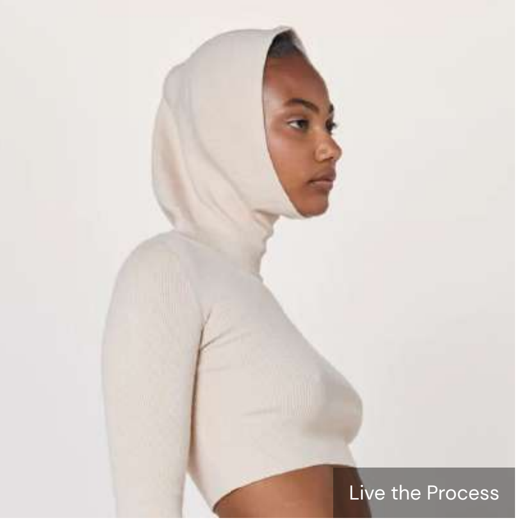
Active and the outdoors: moving away from yoga and the gym, adventure-seekers continue to grow as consumers embrace #TheGreatOutdoors. Consumers will engage with brands selling gear to inspire new activities such as treks or winter sports, as seen in our A/W 23/24 NatureVerse Forecast.

Opportunities: activewear begins to move away from typical gym gear to finding its own identity at retailers, eg activewear as grunge romance or fluid careerwear. The rise of new hybrid lifestyles born post-pandemic, and examples such as breakdancing entering the Olympic Games in 2024 for the first time, will see a new wave of inspired individuals looking to pursue new sports and activities.

New-in volumes of activewear: the hoodie and bodysuit are the only items that increased product counts in A/W 22/23



WGSN Barometer. Q: What would have motivated you to make a purchase from [brand] in-store/online when you just browsed? Across eight leading active brands from July - December 2022 and 2021



Think about head cover designs to tap into the #Modest market

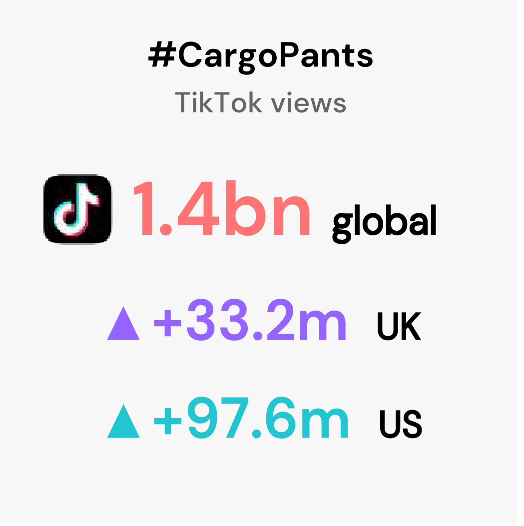
Trousers and suits

A good performance for bottomweights is noted, led by growing volumes of woven bottoms, up 25% (UK) and 30% (US).

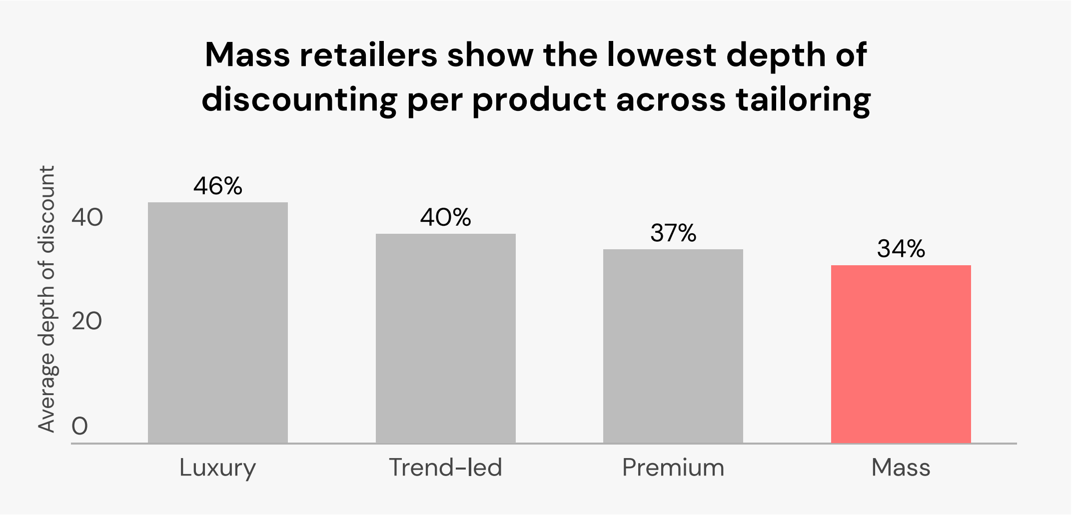
#Utility-inspired looks: cargo trouser styles demonstrated excellent growth YoY, +219% (UK) and +121% (US), alongside strong performance in both regions. Look to the A/W 23/34 carpenter trouser for an updated cargo design.

Wide-leg trouser: offering the #RelaxedFormal look as well as comfort, retailers continue to back this fit for 2023, as seen in our S/S 23 Press Previews. The wide-leg/baggy trouser is up YoY, +26% (UK), +45% (US), taking share over the decreasing volumes of skinny/slim legs (-25% UK, -12% US). Pair as mix-and-match tailoring or use in occasionwear suit sets to maximise the item.

Suits and tailoring: although a small share of the apparel mix, 1.2% (UK) and 1% (US), this category increased its product count by 67% and 51% in A/W 22/23, with trouser suits performing exceptionally well in both regions.



TikTok. UK and US, last 120 days as of February 7, 2023 within apparel and accessories



WGSN e-commerce. Data collected from UK and US retailers from August - December 2022. UK and US combined

Cargo trousers: new-in OOSs increased above the category average, and new-in markdowns decreased to below average in the US, but remained above average in the UK (UK: OOS 13.4%, MD 32.4%, US: OOS 15.9%, MD 11.6%)

Trouser suits had stellar performance in the UK and US, outperforming all other suits and tailoring styles on new-in OOS rate

Knit bottoms were down 20% (UK) and 27% (US), as retailers backed relaxed woven fits instead

Jacket and outerwear

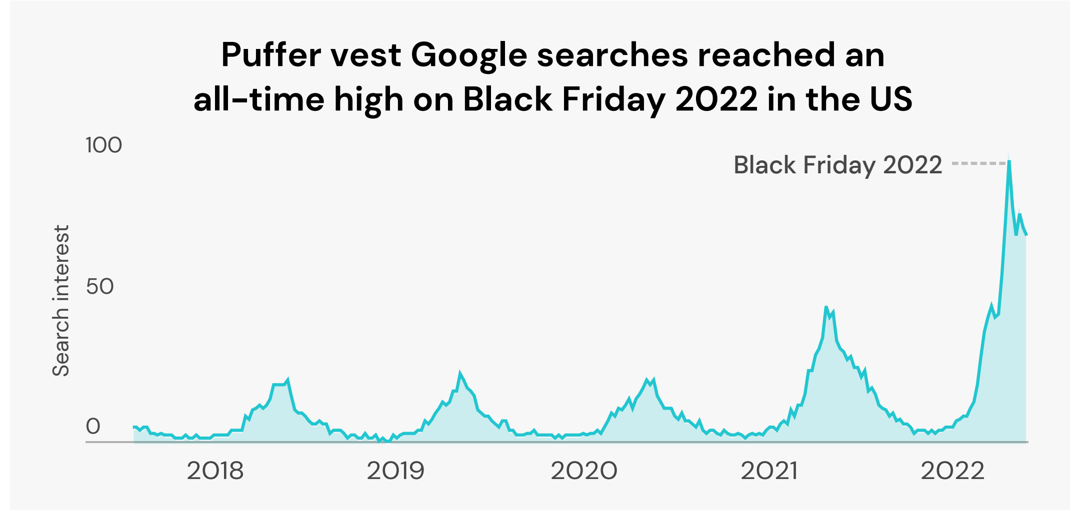
The blazer takes the performance top-spot, while outdoor and utility jackets follow closely behind.

The motorcycle jacket: the popular bomber shape has performed well and the refined motorcycle jacket is an A/W 23/24 key item. This item will appeal to Gen Z consumers, while a vintage version for older generations has recently been trending on Google Search.

Made for the outdoors: demand for practical features for the outdoors grow, and #ModularDesign will help here. The weatherproof outer layer taps into the multifunctional market, and the gilet is growing popular with younger consumers and trend-led retailers.

A timeless classic: retailers are beginning to adapt trenchcoats for longevity and practicality, and although only performing well in the US (the UK needs to catch up), they have potential as #CollectionEssentials and #ReworkedClassics. Additionally, classic coats were one of the the only styles in coats to see a decrease in new-in markdown rate YoY (UK: OOS 7.2%, MD 18%, US: OOS 9.9%, MD 8.5%).

Gilet/puffer vests increased share of the jacket mix by 2.1ppt to 10.7% (UK) and by 1ppt to 7.7% (US). Both regions showed a higher than average performance



Google Trends. US, February 2018 - December 2022

Top Google searches for biker jacket:
UK: sleeveless biker jacket +190%, oversized biker jacket women's +110%
US: Balenciaga biker jacket +350%, purple biker jacket +130%, AllSaints Dalby leather biker jacket +100%, racing jacket +90%, leather biker vest +70%

Trenchcoats only performed well in the US, with new-in OOSs lower than average, whereas new-in MDs were higher than average in the UK

Intimates

Performance on bras slows down, opening an opportunity for intimate tops.

Camisoles gain share of the intimates mix: items known as intimate tops gained share of the intimates mix in A/W 22/23 and had better performance compared to the rest of the intimates category. Additionally, the rise of corset tops paired with daywear opens a space for more #UnderwearOuterwear styles, where lingerie specialists can use traditional techniques and include more lounge pieces within ranges.

Room to lower volumes of bras: although intimates gained YoY share of the apparel mix in 2022, performance does not reach the same level as previous A/W seasons. Amongst this, bras were one of the worst-performing styles across apparel as consumers opt for lounge-daywear styles instead.

Maternity opportunity: with the rise of maternity aesthetics seen on celebrities, the modern maternitywear market taps into #InclusiveDesign. Currently, intimates and sleepwear show growth (+1.4ppt YoY), accounting for 13% of the maternity mix in A/W 22/23, setting the scene for nursing bras to rise in the future.

#Shapewear

TikTok views

1.9bn global

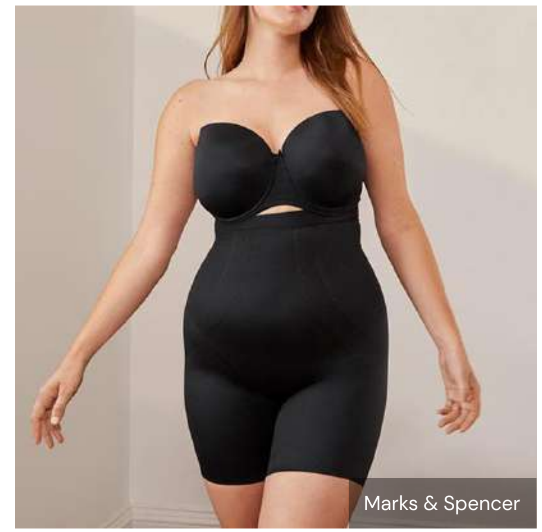
▲ +36.1m UK

▲ +132.9m US

Tik Tok. UK and US, last 120 days as of February 7, 2023 within Apparel and Accessories

Camisoles had one of the best performances across intimates.
UK: new-in OOSs: 7%, new-in MDs: 22.5%
US: new-in OOSs: 4.8%, new-in MDs: 20.2%

Bodysuits were a standout style within intimates for A/W 22/23, with the highest out-of-stock rate in the US and UK



Shapewear corset/bustiers had the highest OOSs in the US and second highest in the UK. However, they had high new-in markdown rates in the UK but much lower in the US than average

Sleep and loungewear

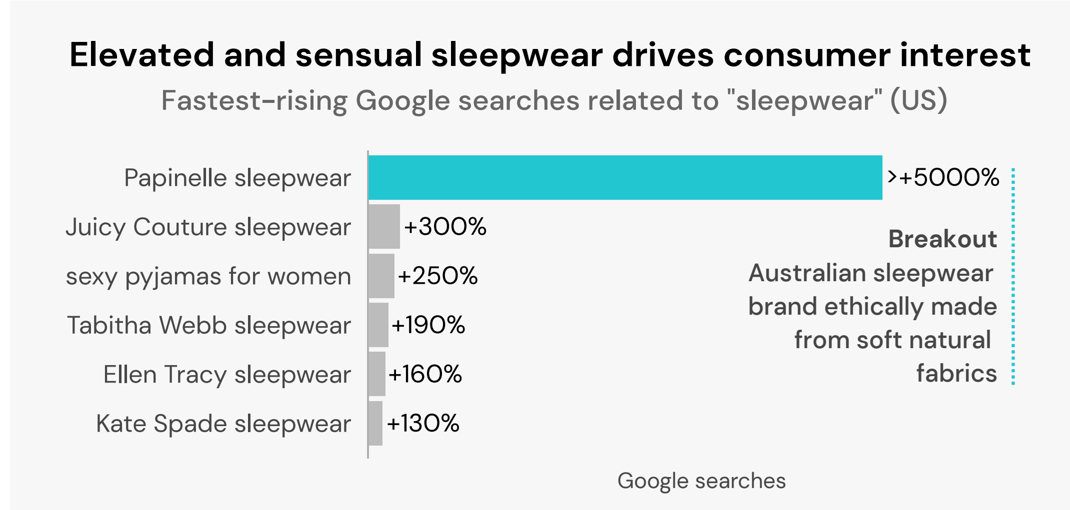
Although gaining market share, performance is not corresponding to this, and retailers need to rethink the difference between lounge and sleep.

Performance not as expected: another category that gained share but performed worse YoY, retailers should pull back on pyjama quantities. Furthermore, pyjamas continue to hold the largest product share with little change on volumes year after year, yet performance declines.

Dressing gowns: in line with the rise of at-home loungewear, dressing gowns were the only category that performed better than the rest of sleepwear. The higher-than-average new-in OOSs and lower-than-average new-in MDs indicate a preference for a layering item over traditional PJs.

Quality will be key: search terms for elevated sleepwear grows, as working from home means consumers dress with a possibility to be seen if needed. Think of more durable materials that still offer comfort to be worn throughout the day, as well as refining prints for a luxurious feel, such as #DarkGroundFlorals.

Skims



Google Trends. US, January - December 2022


Next


Boux Avenue

Dressing gowns – performing well in both regions.
UK: new-in OOS rate: 5.4%, new-in markdown rate: 15.9%
US: new-in OOS rate: 3.4%, new-in markdown rate: 21.5%

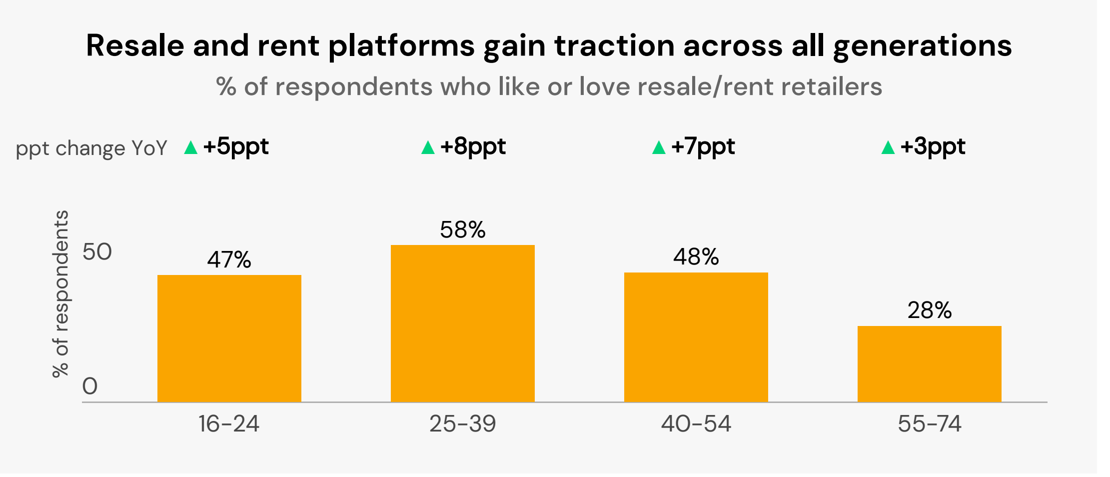

Walmart

WGSN

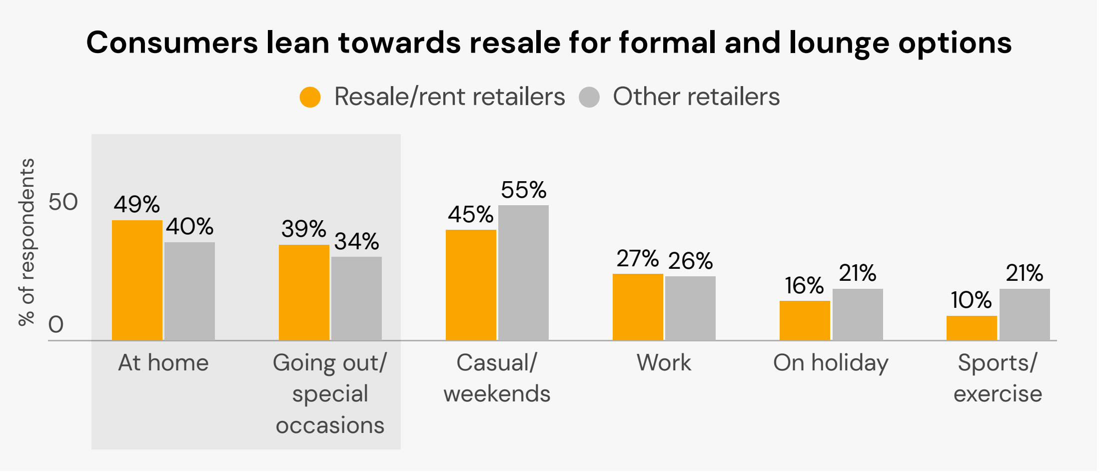
Resale opportunities

As resale sites gain greater traction, the percentage of consumers that report loving resale platforms has grown YoY across all demographics.

- Millennials and Gen X lead resale affinity, with Gen Z a close third. Although Boomers lag behind, this segment has also increased YoY, with more than a quarter reporting affinity
- Consumers that spent "more than expected" on #RentAndResale outpaced traditional e-commerce sites in A/W 22/23. Top reasons that spurred a resale visit versus a traditional retailer include "saw on a television show" and "saw on social media", signalling that consumers are looking to recreate outfits they've seen on celebrities with secondhand goods. Shoppers are also looking for "something they saw in-store previously", building opportunity for reselling own-brand top-performing styles from seasons past
- In A/W 22/23, more than a fifth of consumers visited resellers because they heard something positive from friends or family. Entice top buyers to share their content on social platforms and leverage loyalty programmes to monetise word-of-mouth business
- "At-home" use and "going out/special occasions" are the end-uses that were most prevalent in A/W 22/23 for resale/rent sites, signalling partywear and #ReworkedClassics as a key directions to clients who would like to start testing apparel resale during the autumn and Holiday seasons



WGSN Barometer. US, last three months as of December 31, 2022 and 2021. Across five main resale/rent platforms

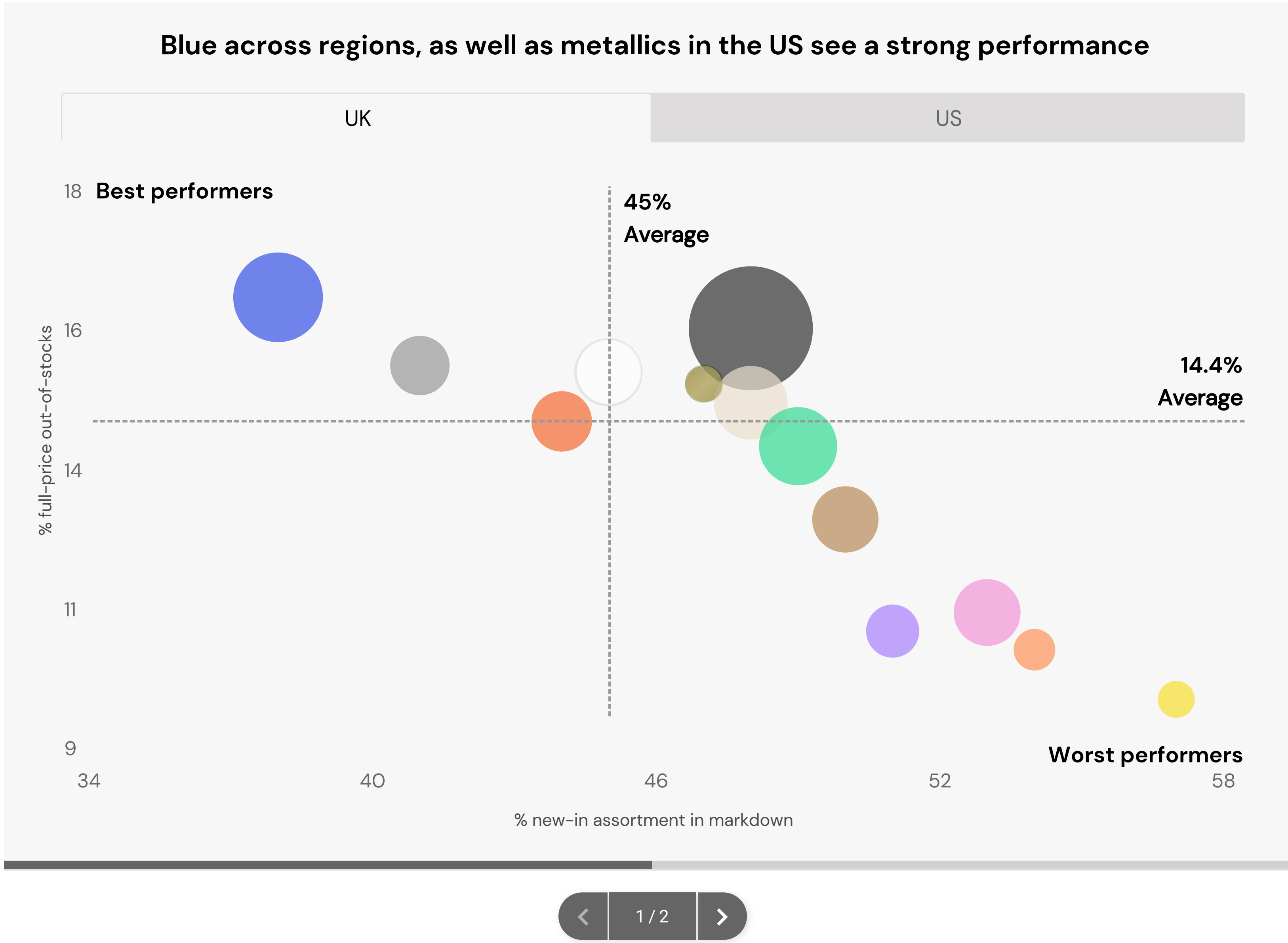


WGSN Barometer. US, last three months as of December 31, 2022 and 2021. Across five leading resale/rent platforms. Q: When did you imagine wearing the items you were looking at?

Colour

Neutrals lose popularity, with performance declining in both regions.

- **Shades of blue perform well:** blue has been performing the best in the UK, with low markdowns at 38% and high FP OOSs at 16%. New-ins remain stable YoY with the help of performance blue's strong presence in stores for A/W 22/23. A similar pattern shows for the US, with performance slightly above average
- **Declining neutrals:** after the S/S 22 wedding boom, white declined in A/W 22/23, along with the rest of the neutrals palette, making room for catwalk-inspired brights. Gold, silver and bronze metallics performed better in the US, as occasion-friendly neutrals
- **Core colours and highlights:** black continues to represent the biggest share of the new-in colour mix, and will be key for #GothLite and #BlackWithBlack trends. A few additional trending shades showed small growth – greens (8.6% UK, 6.9% US), pinks (6% UK, 5% US) and purples (3.3% UK and 3.6% US)



WGSN e-commerce. Data collected from retailers in the UK and US from August - December 2022

WGSN

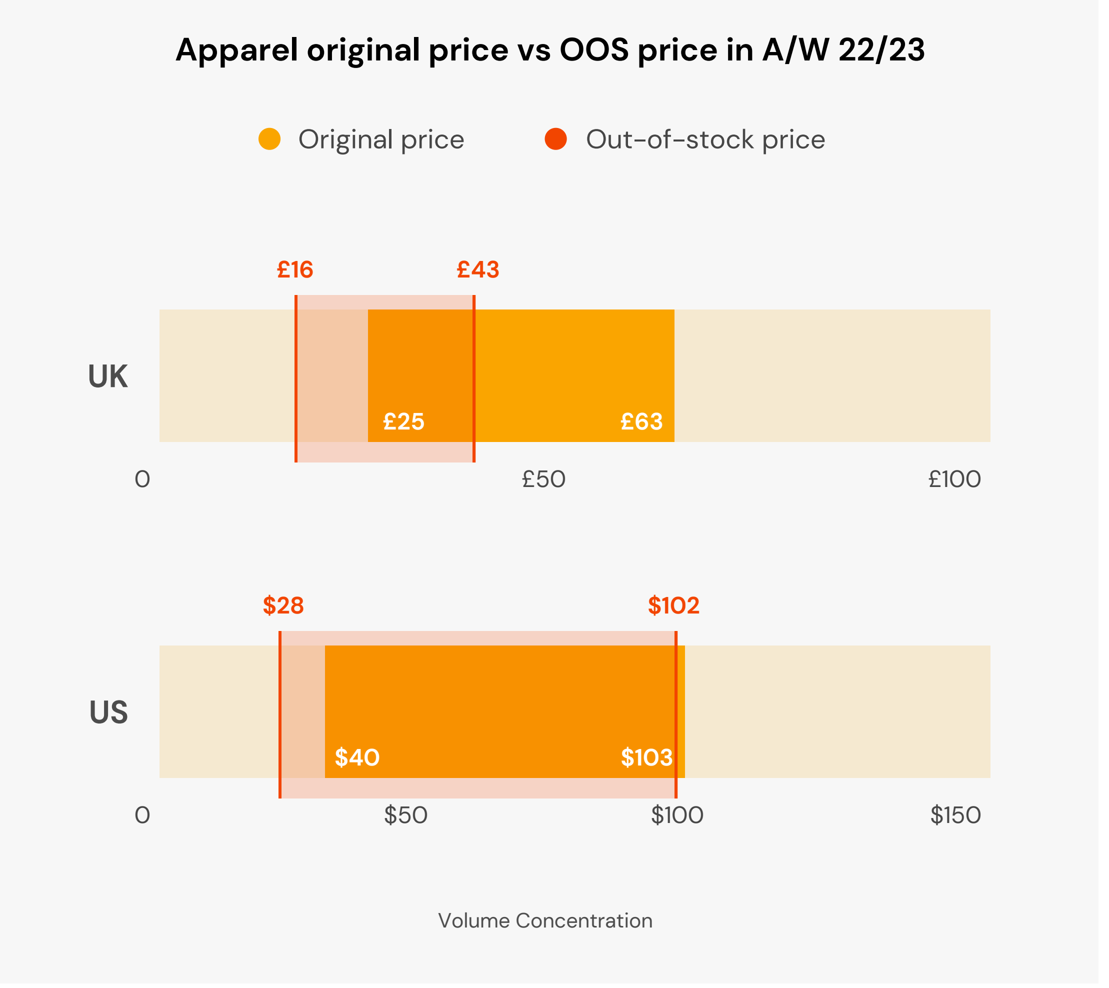
Pricing

A data-led update on current online price-points in the UK and US.

For fresh ideas on designing through inflation and the current energy crisis, visit our Cost of Living: Design Priorities.

Excluding luxury retailers

- **UK consumers struggle with higher price-points:** understandably with the current #CostOfLiving crisis, the highest out-of-stock rates sat between £16 - £43 for all apparel. Although retailers increased the average original price YoY by 6% to £53 in A/W 22/23, consumers are reluctant to purchase the increased prices
- **Occasion dresses in the UK:** in last season's S/S 22 Debrief, the UK had potential for higher price-point occasion dresses, backed by longer-lasting properties and versatile end-use, for an elevated price-point. Since the recent #CostOfLiving events, and a declining performance for new-in dresses, retailers are urged to remember this remains a small number of special occasion dresses, and overall daywear styles should remain under £40 for trend-led retailers
- **Price-points in the US are more in line with consumers' expectations:** the average original price of apparel has increased by 5% YoY to $124, and this remains a good alignment with what consumers are willing to pay. The majority of stock sold through at original price sat between $28 - $102



WGSN e-commerce. Data collected from UK and US retailers from August - December 2022. Excluding luxury retailers

WGSN

Methodology

WGSN e-commerce data

- Analysis based on women's apparel products collected from WGSN's proprietary retail e-commerce data platform from August 1 to December 31 2022 and 2021. Market includes retailers tracked in the US and UK
- Some retailers are excluded to ensure like-for-like calculations and to avoid inflated product counts due to the acquisition of new retailers on the platform
- Numbers may fluctuate as we recategorise to help clarify ambiguous/new products or if retailers refactor their websites

WGSN social media data

- We use text analytics to track, measure and respond to the conversations that are driving some of the key trends within this report across our WGSN Influencer Map
- WGSN Influencer Map: created by a team of WGSN trend specialists that lists influencers from the US and Europe, selected from a range of disciplines, eg brands, stylists, photographers, publications

WGSN Barometer

- WGSN Barometer is a retail consumer intelligence and surveys platform. Data used was collected across women aged 16-74 in the UK and US

Definitions

- Assortment mix (%): products in each category divided by overall apparel products available during the specified period
- New-in: the products that are newly added to the retail website in the timeframe selected
- Markdown (%): products in markdown divided by overall products available during the specified period in each given department or category
- Out-of-stocks (%): the proportion of products that have 50% or more SKUs out of stock (OOS)
- Full-price out-of-stocks (%): percentage of products where at least 50% of the SKUs (colour or size) were not available for purchase on a retailer's site but still shown, and kept at original price, any day during the selected timeframe
- Percentage point (ppt): a percentage is the proportion of a set of products over a larger set – an example is new-in trousers over new-in apparel mix. A percentage point computes the arithmetical difference between percentages; going from 40% to 44% is a 4ppt increase
- YoY: year-on-year