



KAUPAN LIITTO

# The clothing market and the consumer's path to purchase

Jaana Kurjenoja

Excerpts from the survey.

The full report is available to members of the Finnish Commerce Federation on the members' pages at [Kauppa.fi](https://www.kauppa.fi), in the Research section.



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Excerpts from the survey.



## Background of the survey

Excerpts from the survey.

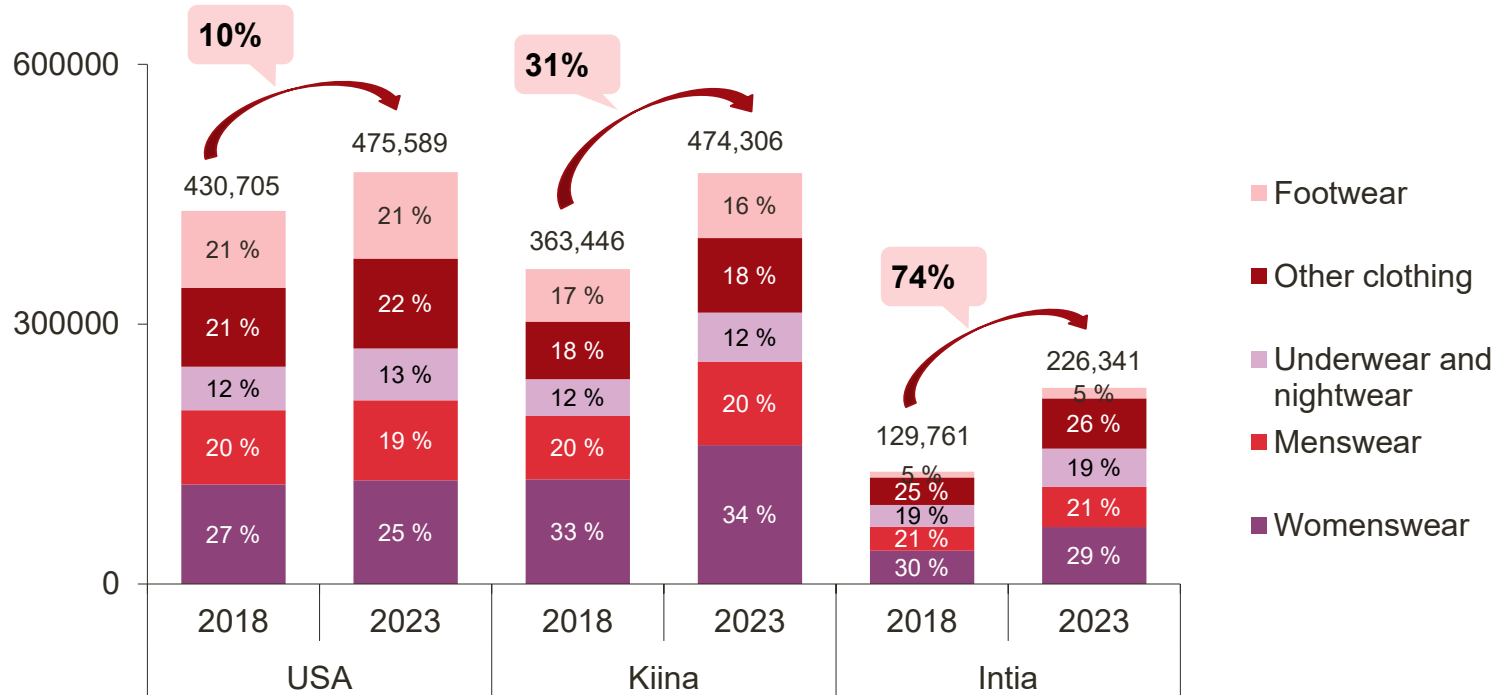
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## Background of the report: why and how?

- The specialty goods trade in clothing last saw growth in Finland in 2012. The Finnish Commerce Federation wanted to support the clothing industry by surveying the clothing market's size and development forecasts as well as the way consumers in Finland buy clothing and footwear.
- A further goal was to survey where and how people buy sportswear, as sportswear is currently a major trend in clothing and fashion.
- The statistical data and forecasts in this report are based on Statista databases (Consumer Market Outlook, Digital Market Outlook, Global Survey and eCommerceDB), the Official Statistics of Finland (OSF) produced by Statistics Finland as well as company data retrieved via Vainu.io.
- The sections on the consumers' path to purchase are based on two sample-based consumer surveys conducted by TNS Kantar in March–April 2019. The person in charge of the research design and the design of the questionnaire forms for the consumer survey is Jaana Kurjenoja, Chief Economist of the Finnish Commerce Federation.
  - TNS Kantar was responsible for creating the samples and collecting the data.
  - The first consumer survey was focused on the path to purchase of clothing and footwear as well as the most widely used retailers. The sample consisted of 1,525 Finns aged 15–79 living on the mainland. The structure of the sample corresponds to the structure of the population.
  - The second consumer survey was focused on the path to purchase of sportswear (sporty clothing and footwear) and the most widely used retailers. The sample consisted of 2,019 Finns aged 15–79 living on the mainland. The structure of the sample corresponds to the structure of the population.
  - The surveys were implemented using the Internet-assisted GallupForum respondent panel.

# USA is the largest market for clothing, but China and Italy are seeing rapid growth

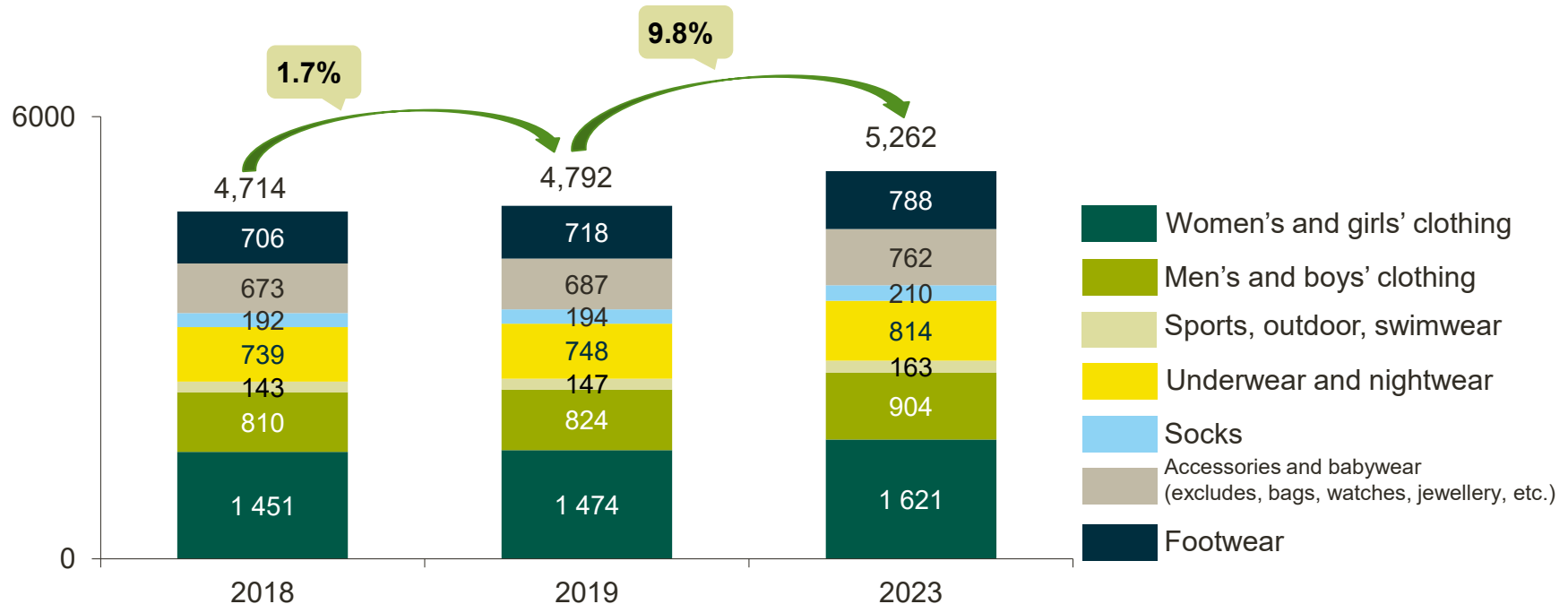
Clothing purchases in the largest markets 2018–2023, USD million



# Clothing purchases in Finland, measured in euros, will grow at an average annual rate of just over 2% from the present to 2023

Total consumer spending on clothing and footwear, approx EUR 4.7 billion in 2018 (incl. VAT)\*

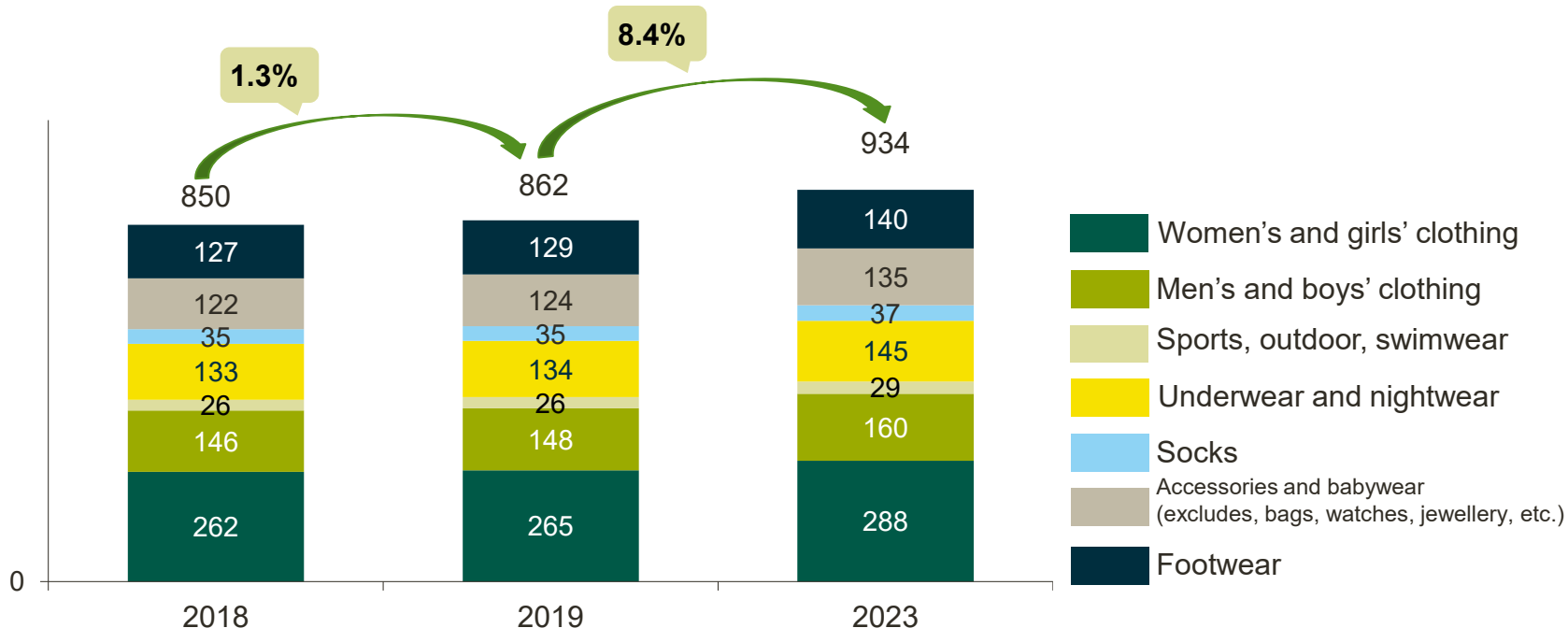
\*Excludes rental, laundry services, sewing supplies, textiles for clothing, etc.



# The average consumer purchase basket will grow by approximately 2% annually from the present to 2023

Consumer spending on clothing and footwear per year, on average, approximately EUR 850 in 2018 (incl. VAT)\*

\*Excludes rental, laundry services, sewing supplies, textiles for clothing, etc.





# Consumer shopping basket in 2018, an international comparison

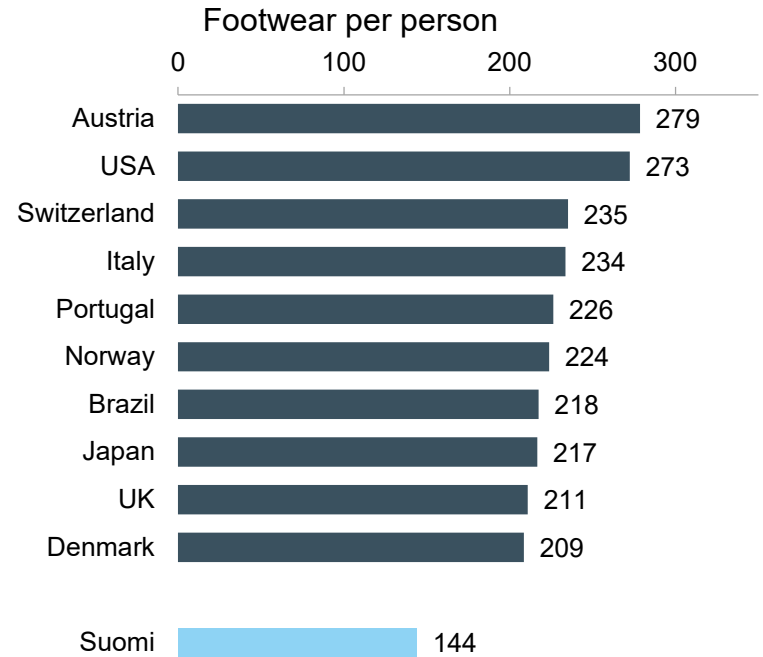
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# The European shopping basket for clothing and footwear has a high value – either due to its content or the prices

Average per capita spending on clothing and footwear in 2018, USD



# Where people buy clothing, footwear and sportswear

– April 2018–March 2019

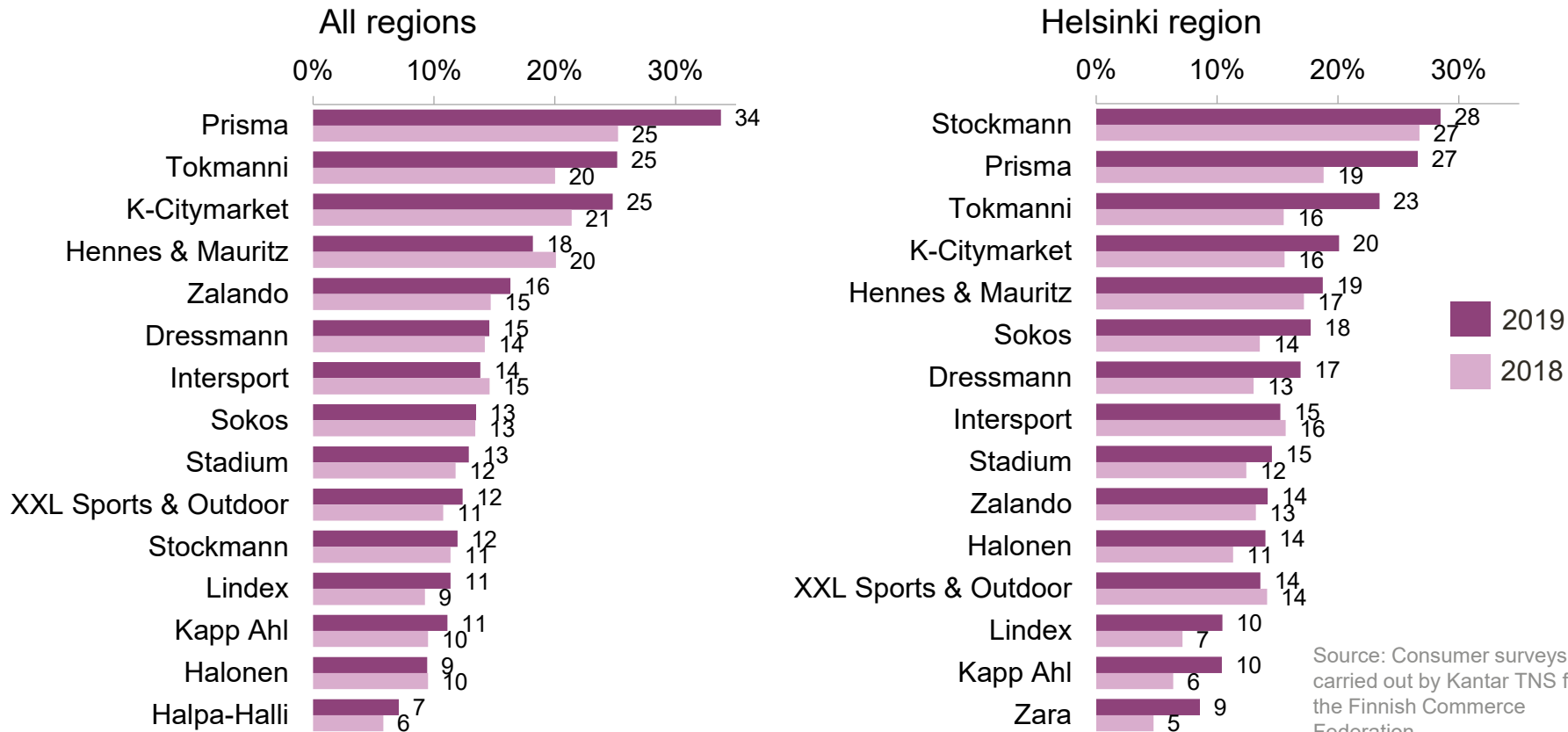
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# Supermarkets have strengthened their position in clothing retail

Top 15 clothing retailers used by Finns, % of customers who have bought from the retailer during the year



Source: Consumer surveys carried out by Kantar TNS for the Finnish Commerce Federation.



# The path to purchase for clothing and sportswear

– April 2018–March 2019

Excerpts from the survey.

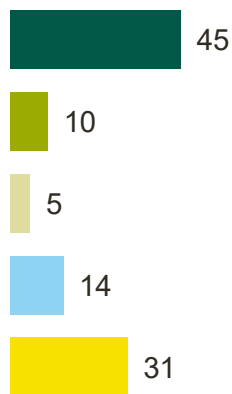
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# Brick-and-mortar shops are still the most significant channel for finding information and buying clothing, but a quarter of all purchases are now made via digital channels

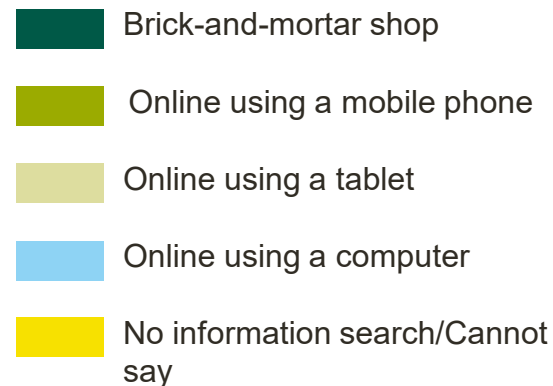
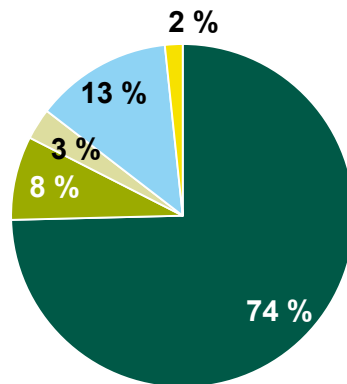
Channels for finding information to support purchase decisions and channels for purchasing clothing and footwear

What channels did you use to find information and what channel did you use to make your most recent purchase? April 2018–March 2019

Channels used for information search before most recent purchase



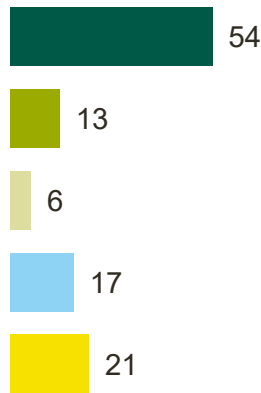
Purchase



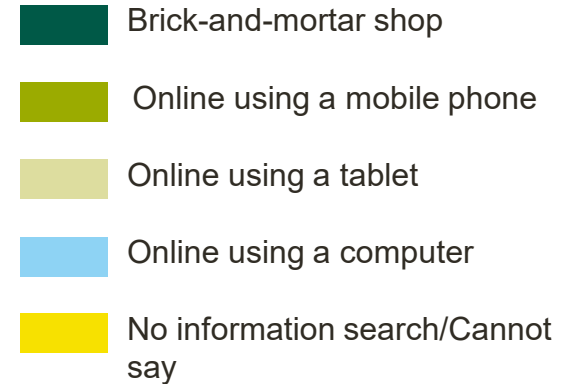
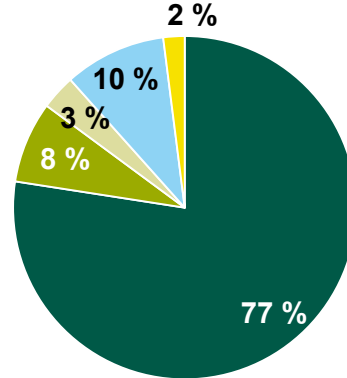
# Information search is more common for sportswear – brick-and-mortar shops have a stronger position as a purchasing channel

Channels for finding information to support purchase decisions and channels for purchasing sportswear  
 What channels did you use to find information and what channel did you use to make your most recent purchase? April 2018–March 2019

Channels used for information search before most recent purchase



Purchase



## Sources

Statista, 2019: Consumer Market Outlook.

Statista, 2019: Digital Market Outlook.

Statista, 2019: Global Survey.

Statista, 2019: eCommerceDB database.

Other Statista databases.

Statistics Finland, 2019: Annual National Accounts.

### **Consumer surveys commissioned and designed by the Finnish Commerce Federation:**

Kantar TNS: Most widely used clothing retailers and the consumer's path to purchase, March–April 2019.

Kantar TNS: Most widely used sportswear retailers and the consumer's path to purchase, March–April 2019.

### **Information search from open sources and databases such as the Finnish Patent and Registration Office:**

Vainu.io search engine.

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