

# Apparel & Fashion: An Industry Snapshot

What factors influence consumers' apparel purchasing behavior? This month, we are examining Americans' shopping habits using data from recent Harris Poll surveys and QuestBrand data. The report is intended to provide a glimpse into the world of apparel and accessories shopping as of September 2024.

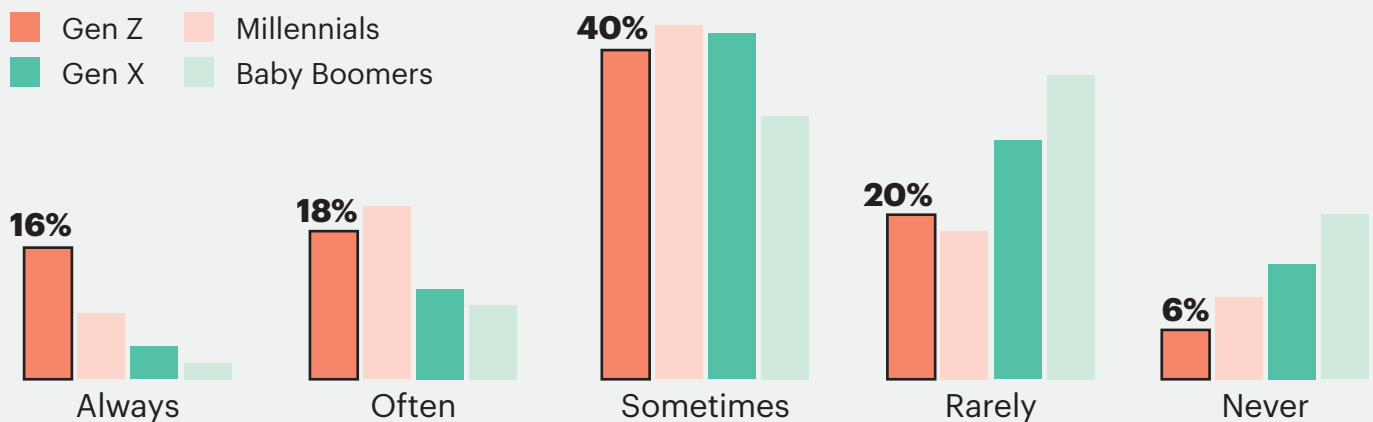
The snapshot explores how two factors - external validation and discounts - impact customers' purchasing decisions. We close with our monthly over-index report - listing fashion brands that over-index with active social media users. Our goal is to provide brands with the information needed to understand their target consumer.

## Gen Zers' Purchase Confidence Soars...When Other People Weigh-In

Does yellow clash with my skin tone? Should I get the medium or the large? Is this appropriate for a work happy hour? Many of us prefer shopping with another person, and hearing their thoughts, before committing to a new purchase. **However, our data finds that not all consumers are equally swayed by others' thoughts - Gen Zers take them more to heart than older generations.**

**A third (34%) of Gen Zers say that they *always or often* seek out another person's (e.g., friend, store associate) opinion about an item they are considering purchasing.** The need for external validation drops among older shoppers (Millennial: 29%, Gen X: 15%, Boomer: 11%). **This discrepancy in shopping habits may come down to confidence. Half (48%) of Gen Z says that they feel more confident purchasing items for themselves when they shop with someone they know than they do when they shop alone (Millennial: 32%, Gen X: 29%, Boomer: 25%).**

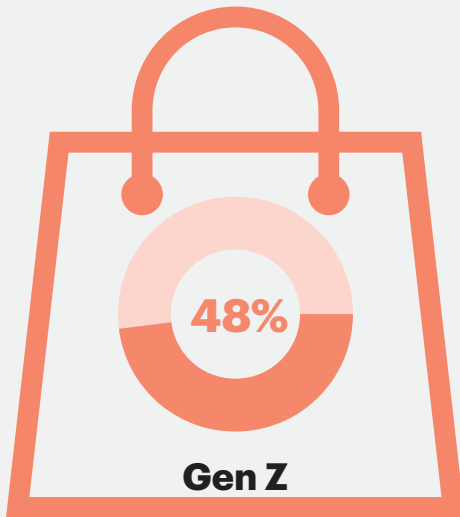
How often do you **seek out another person's opinion** about a fashion item you're **considering purchasing**?



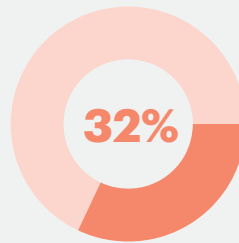
Base: Gen Z adults, n=176. Base: Millennials, n=279. Base: Gen X, n=295. Base: Baby Boomers, n=292. QS2Q2: How often do you do each of the following when shopping for fashion items (e.g., clothing, accessories)? Seek out another person's (e.g., friend, store associate) opinion about an item I'm considering purchasing

**Gen Z is more likely to purchase a fashion item if a family member (57%), significant other (57%), friend (56%), another shopper (41%), or a store associate (35%) recommends it.** Even beyond receiving positive validation from another person, **a quarter (23%) of Gen Z consumers** say that they are even **more likely to purchase a fashion item if an artificial intelligence tool recommends it.**

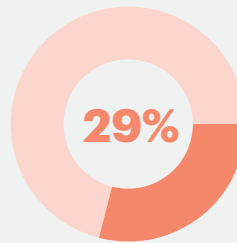
Some consumers go so far as to trust another person's opinion above their own. **A third (33%) of Gen Zers** have decided **to not purchase an item that they wanted because they got negative feedback** from someone else (Millennials: 26%, Gen X: 23%, Baby Boomers: 22%). Similarly, (33%) of Gen Z have decided to **purchase an item they didn't want because they got positive feedback** from someone else (Millennials 23%, Gen X: 16%, Boomer 7%).



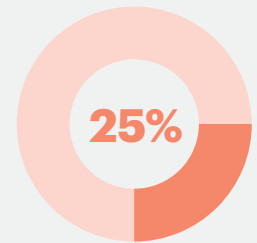
"I feel **more confident purchasing** items for myself when I **shop with someone I know.**"



**Millennials**



**Gen X**



**Baby Boomers**

Base: Gen Z, n=176. Base: Millennials, n=279. Base: Gen X, n=295. Base: Baby Boomers, n=292. QS2Q5: Which of the following statements about shopping for fashion items (e.g., apparel, accessories) are true for you? Please select all that apply. I feel more confident purchasing items for myself when I shop with someone I know than I do when I shop alone.

The importance of external validation doesn't stop at the cash register. A third (28%) of Gen Z say that they are **more likely to return an item they purchased for themselves if they bought it without outside input** (Millennials: 20%, Gen X; 11%, Baby Boomer: 8%).

Who do these young shoppers want input from? Unsurprisingly, Gen Z usually looks to the people that they are closest to. When shopping for fashion items, Gen Zers who typically seek out other opinions most often turn to their **family members** (65%), **friends** (64%), or their **significant other** (43%). Less frequently, they seek the opinions of **store associates** (20%), the **broader network of people they know** (e.g., colleagues, social media followers) (13%), or **other store customers** (12%).

Gen Zers who usually seek out other opinions on fashion items typically ask for feedback on an item's **appearance** (e.g., style, color) (71%), **potential outfit combinations** (57%), **quality** (e.g., durability, feel, manufacturing) (55%), **fit** (50%), **price** (e.g., whether the item is a "good deal," whether it makes financial sense to purchase) (47%), **potential wear occasions** (45%), and **trendiness** (24%).

What can brands take away from this? To increase sales, and decrease returns, **companies should look for opportunities to naturally incorporate feedback into young shoppers' buying journey both online and in-store.** Make it easier for shoppers to share photos and item details with family or friends, and you just might see more confident purchases from Gen Z.

# Who Doesn't Love A Sale?: The Importance Of Scoring A "Good Deal" On Consumer Purchasing Behavior

Are you more likely to buy an item if it's on sale? **Three-quarters (73%) of US adults say that they are more likely to purchase a fashion item (e.g., clothing, accessories) if it's on sale.** Why? We love the feeling of getting a "good deal."

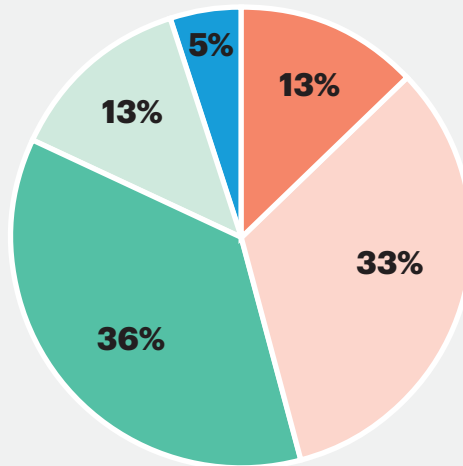
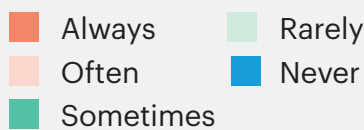
**Seven-in-10 (69%) US adults say that they are more likely to purchase a fashion item if the item is less expensive than they anticipated (e.g., a "good deal").** A similar number (65%) say that they **often or always feel proud when they find a good deal.** A full 18% of US adults (and 32% of Gen Z) go so far as to say that they are **willing to purchase an item that doesn't fit them perfectly (e.g., sizing, flattering style) if it's on sale.**

The "sale" label impacts when shoppers choose to buy. **A quarter (24%) of US adults say that they rarely purchase fashion items at full price. Half (46%) of US adults say that they always or often wait for a sale to shop for items.** Are you in the know? - 38% of US adults say that they **always or often know when their favorite stores are having a sale.**

Beyond seasonal sales, many Americans regularly shop for deals in the discount section. Three-in-five (59%) US adults say they are **more likely to purchase a fashion item if the item is in a discount section (e.g., clearance, gently used).** Half (47%) of US adults say that they **always or often purchase items from a store's discount section.**



How often do you **wait for a sale** to shop for items?



Base: US adults, n=1,090. Q52Q2: How often do you do each of the following when shopping for fashion items (e.g., clothing, accessories)? Wait for a sale to shop for items

Consumers who do not (or rarely) shop in the discount section, choose not to due to the perceived **quality of items** (e.g., cheap materials, bad manufacturing, poor durability) (49%), **size limitations** (e.g., some sizes not available) (44%), **appearance of items** (e.g., damaged, wrinkled, dirty) (38%), **disorganization of discount section** (34%), **return policies** (e.g., final sale, only offered store credit) (25%), **style limitations** (e.g., some styles not available) (23%), or because **it's embarrassing to buy discounted items** (7%).

When planning sales or other discounts, brands must keep in mind how **important it is for customers to feel like they are getting a good deal on a fashion item.** This perception of saving money encourages consumers to make a purchase, and makes them feel good about their decision.

# Fashion Nova: This Fast Fashion Giant Could Teach A Class On Social Media Marketing

Fast fashion superstar Fashion Nova started as a single brick-and-mortar store in Los Angeles in 2006. Today, they have five physical stores across Southern California, but the bulk of Fashion Nova's sales are through their online store. Each week, **1,000+ new apparel items are added to Fashion Nova's website.**

In 2018, Fashion Nova was named the **#1 Most-Searched Fashion Brand** on Google. How did a small boutique become a go-to online retailer for millions of teens and young adults? **Social media marketing.** Fashion Nova has heavily invested their time and resources into building a robust social media presence. They have used social media to grow their brand recognition, attract new customers, and increase sales.

Today, **Fashion Nova boasts more than 4 million TikTok followers, and more than 21 million Instagram followers.** The online retailer posts fresh Instagram content every half an hour, and often reposts customers' content. But they don't stop there. Beyond their official accounts, **Fashion Nova partners with a wide variety of influencers**, both small and large (most famously Cardi B), to ensure that young consumers see their products - whether on Instagram, TikTok, YouTube, or Snapchat.

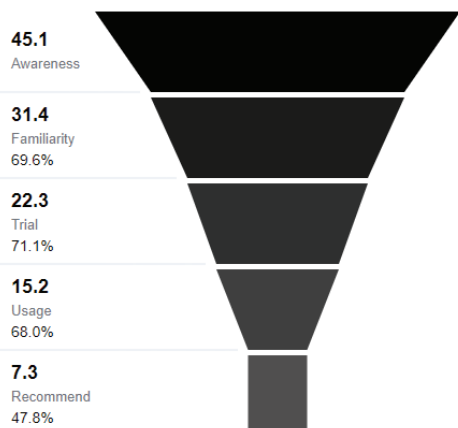
Using data from **QuestBrand by The Harris Poll**, we compared Fashion Nova's sales **conversion funnel** among the general population of US adults to their **sales conversion funnel among active TikTok and Instagram users.** Sales conversion funnels track a customer's journey on the buying process, from initial brand awareness through to product purchase and recommending the product to others.

We can see from the data below that **Fashion Nova's sales conversion funnels are significantly wider among active social media users.** This wider funnel is especially prominent among TikTok users - **awareness (+21.7), familiarity (+19.4), trial (+12.9), usage (+9.4), and recommend (+5.2).** This data strongly supports Fashion Nova's decision to lean into social media - it is clearly a space where the brand can connect with their target customer.

## Fashion Nova Sales Conversion Funnel

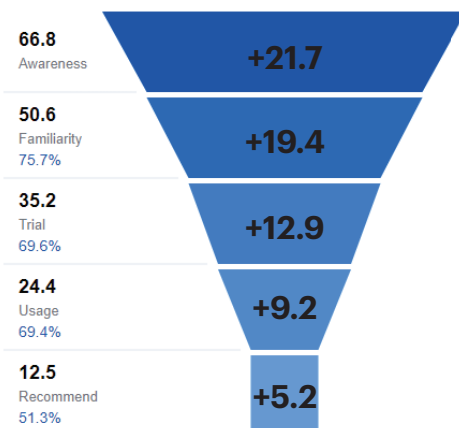
### US Adults, Ages 18+

Out of 100 People  
(% from step above)



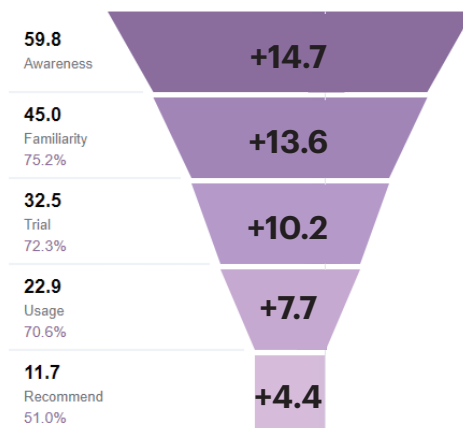
### TikTok Users

Out of 100 People  
(% from step above)



### Instagram Users

















Out of 100 People  
(% from step above)



# Over-Index Report: Fashion Brands by Social Media Users

In this month's report, we used data from QuestBrand to rank fashion brands that over-index with users of each social media platform: TikTok, Facebook, Snapchat, and Instagram. This indicates that each platform's users value these brands more highly than

the general population of US adults. To determine this ranking, we compared each brand's brand equity score among the general population of US adults to its brand equity score among social media users. Brand equity data was taken from January - June 2024.

TikTok	Facebook	Snapchat	Instagram
FASHION <b>NOVA</b>	NINE WEST	FASHION <b>NOVA</b>	FASHION <b>NOVA</b>
	<b>LANDS' END</b> 		ANTHROPOLOGIE
<b>PANDORA</b>	WARBY PARKER	<b>FOREVER 21</b>	
<b>FOREVER 21</b>	<b>GARMIN</b> 	<b>STEVE MADDEN</b>	 vineyard vines
	<b>Timberland</b> 	AMERICAN EAGLE	<b>SPANX</b> <small>BY SARA BLAKELY™</small>
ANTHROPOLOGIE		Abercrombie & Fitch	
	<b>P A C S U N</b>	 <b>LACOSTE</b>	CANADA GOOSE
 <b>ATHLETA</b>	TIFFANY & CO.	 <b>COACH</b>	
AMERICAN EAGLE	<b>DULUTH</b> TRADING CO.	 <b>CONVERSE</b>	<b>BIRKENSTOCK</b>
<b>crocs</b> ™	MEN'S WEARHOUSE®	<b>patagonia</b> ®	<i>J. Crew</i>

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