In Apparel, Age Isn’t Everything

Winning in today’s apparel sector requires a multidimensional approach in which age is just one of many factors in determining who apparel shoppers really are.
What Apparel Shoppers Want

For several years, apparel brands and retailers have focused largely on Millennials—the 18 to 34 year olds with smartphones, money to spend, and few ties that bind. Millennials number 83.1 million, which is one-quarter of the US population, and represent 38 percent of total spending in US apparel sales.

Retailers, however, tend to think of the Millennial generation as a single bloc of buyers all of the same mind and with the same life experiences. They are not. In our recent study of the apparel purchases of three generations of shoppers—Millennials, Gen-Xers, and Baby Boomers—we confirm that while age is a factor to consider in apparel sales, it is not the only one (see About the Study on page 4). Life stage, lifestyle, and attitude toward fashion are as important attributes to consider about today’s apparel shopper, and can predict behavior in more accurate ways than age.

With a 4 percent downturn in department store apparel sales performance and 2 percent growth in total US apparel sales, retailers and apparel brands are searching for smarter strategies to connect with more shoppers.

Age Is Important, But...

The research reveals that age continues to be important in purchases of certain apparel categories. When evaluating heavy purchasers, Millennials dominate across four categories—jeans, dresses, activewear, and bras (see figure 1).¹

- **Jeans.** About 18 percent of Millennials are heavy purchasers of jeans, compared to 10 percent of Gen-Xers and almost 8 percent of Boomers.

![Figure 1: Millennials dominate across four categories](image)

% of age group that are heavy purchasers by category

Note: Heavy purchasers are consumers who have purchased three or more pieces of apparel in the previous six months; percentages are rounded.

Sources: NPD; A.T. Kearney analysis

¹ Heavy apparel purchasers are defined as people who buy more than three items in a given category within the previous six months.
Dresses. Millennial women love dresses. Millennials are 1.4 times more likely to be heavy purchasers than Gen-Xers, and 2.4 times more likely than Boomers.

Activewear. Millennials constitute more heavy purchasers of activewear than other generations, but the difference across generations is tighter than expected.

- Millennials (20 percent)
- Gen-Xers (18 percent)
- Boomers (11 percent)

Bras. Millennial women constitute 26 percent of heavy purchasers compared to Gen-Xers (23 percent) and Baby Boomers (18 percent).

Millennial heavy purchasers within these four categories represent an important segment. But so do the high percentage of Gen-Xers and Boomers who display similar purchasing behaviors. In fact, our findings indicate that apparel brands and retailers that focus predominately on Millennials risk alienating these other generations of buyers.

Apparel brands and retailers that focus predominately on Millennials risk alienating other generations of buyers, including Gen-Xers and Boomers.

Life Stage, Lifestyle, and Fashion Attitude

Attributes other than age point to shoppers who are most likely to be heavy purchasers in the four categories. These attributes include:

- Life stage (have children or do not have children; married or single)
- Lifestyle (consider active lifestyle important or not important)
- Fashion attitude (are fashion forward or traditional)

Life stage

Not surprisingly, consumers with children have different purchasing behaviors than their generational peers without children. Parents generally purchase more comfortable clothing such as jeans and activewear in order to keep up with the kids (see figure 2 on page 3). And the purchasing behaviors of married shoppers are different from single shoppers, primarily because singles tend to have fewer responsibilities at home.²

What’s interesting is that life-stage differences in purchasing behaviors appear to be most significant within the ranks of the Millennials. Single Millennials are more likely to be heavy purchasers than married Millennials, and Millennials with children are more likely to be heavy purchasers of jeans and activewear rather than dresses and bras. Retailers that continue to target Millennials as one cohort rather than by other attributes risk losing sales.

² All references to married consumers or married shoppers include those in domestic partnerships.
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Lifestyle

Shoppers with active lifestyles, or those who think an active lifestyle is important, purchase more apparel than their less active peers. This proves true across all generations and all categories, with a spike for Millennials and Gen-Xers (see figure 3).
Fashion attitude

About 20 percent of survey respondents say they are “fashion-forward,” meaning they stay up to date on the latest fashion trends. These shoppers, across all categories and generations, purchase more apparel than those who prefer traditional fashions. When asked about brand preference, fashion-forward shoppers purchase from a variety of brands ranging from basic and mass brands to exclusive fashions. By far, these “fashionistas” are the heaviest buyers of all categories of apparel (see figure 4).

Figure 4
Fashionistas are heavy buyers in all four categories

% of age group that are heavy purchasers by category

Note: Heavy purchasers are consumers who have purchased three or more pieces of apparel in the previous six months; percentages are rounded.

Sources: NPD; A.T. Kearney analysis

About the Study

NPD and A.T. Kearney designed and developed the study methodology. Findings are based on a consumer survey of 2,355 men and women in the United States to gain a better understanding of purchasing behavior in four categories: jeans, activewear, dresses, and bras. For the latter two, only women were included in the survey.

The survey results are based on an analysis of four attributes:

- **Age**: Millennials (age 18-34), Gen-Xers (age 35-49), Boomers (age 50+)
- **Life stage**: Single, married, domestic partner; parent or non-parent
- **Lifestyle**: physical activity (number of days per week engaged in physical activity); attitude toward physical activity (important versus not important)
- **Fashion attitude**: Study participants who identify themselves as fashion-forward or traditional shoppers

Participants were asked to provide the number of apparel items they purchased for themselves in the past six months, and the dollar amount spent on the items. Heavy purchasers are defined as those who purchased three or more items in the same category during the six-month timeframe.
Four Categories: By the Numbers

In the first section we highlighted trends across categories. In this section, we discuss attributes that are most meaningful at a category level.

Jeans

The $12.3 billion US market for men’s and women’s denim has suffered a 4 percent decline over the past three years. The jeans market comprises shoppers in various generations, with 40 percent of sales to Gen-Xers, 34 percent to Millennials, and 26 percent to Baby Boomers.

- **Life stage.** Millennials and Gen-Xers with children buy more jeans than their peers without children.

- **Lifestyle.** An active lifestyle is only meaningful for Millennials and does not necessarily drive high purchases for Boomers or Gen-Xers.

- **Fashion attitude.** Attitude is the biggest driver for jeans sales as fashion-forward shoppers are 2.2 times more likely to be heavy purchasers of jeans than their traditional fashion peers.

Activewear

Men’s and women’s activewear is a $40.7 billion market in the United States, with a 12 percent CAGR over the past three years. As the athletic-leisure trend grows, apparel brands are extending into this category, while pure play activewear brands are also experiencing strong sales. Activewear sales to Millennials (40 percent) and Gen-Xers (39 percent) are almost equal in this sector, with sales to Boomers at approximately 21 percent.

- **Life stage.** Across all generations, parents are heavy purchasers of activewear apparel.

- **Lifestyle.** An active lifestyle is the most important driver for this category. Not surprisingly, shoppers who value an active lifestyle are twice as likely to be heavy purchasers of activewear than shoppers with a more sedentary lifestyle.

- **Fashion attitude.** For Millennials and Boomers, fashion matters whether they are cutting a path through the Everglades, scaling a mountain, or visiting their local gym.

Dresses

Dresses is an $11 billion market in the United States, growing slowly at 2 percent a year for the past three years. Gen-Xers and Millennials each account for 37 percent of dress sales, while Boomers account for the additional 26 percent. Millennials buy more dresses compared to other generations.

- **Life stage.** Single Millennials without children buy significantly more dresses than Gen-Xers and Boomers.

- **Lifestyle.** Across the three generations, active women purchase more dresses than sedentary women, with Millennials (17 percent) showing the most significant differences over inactive women (10 percent) (see figure 5 on page 6).

- **Fashion attitude.** Across the various generations, shoppers with a fashion sense are the most prolific purchasers of dresses.
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Figure 5
Dresses by attribute and age group

% age group that are heavy purchasers by category

Marital status

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<th>Millennials</th>
<th>Gen-X</th>
<th>Boomers</th>
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<tbody>
<tr>
<td>Married</td>
<td>10%</td>
<td>10%</td>
<td>9%</td>
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<tr>
<td>Not married</td>
<td>18%</td>
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Parental status

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Active lifestyle

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<td>Active</td>
<td>17%</td>
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<tr>
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Fashion attitude

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<tr>
<td>Fashion-forward</td>
<td>25%</td>
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<tr>
<td>Traditional</td>
<td>6%</td>
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Note: Heavy purchasers are consumers who have purchased three or more pieces of apparel in the previous six months; percentages are rounded.

Sources: NPD; A.T. Kearney analysis

Bras

The US bra category has declined nearly 1 percent per year over the past three years, generating $6.2 billion in sales. Gen-Xers represent 39 percent of sales, followed closely by Millennials at 37 percent, and Boomers further down with 24 percent. Within these generations, fashion attitude and active lifestyle are what differentiates heavy purchasers from all others.

- **Life stage.** Single Millennials without children are significantly more likely than their peers or other generations to be heavy purchasers of bras. Indeed, 30 percent of single Millennials and almost 33 percent of Millennials without children are heavy purchasers compared to about 20 percent of the other generations (see figure 6 on page 7).

- **Lifestyle.** An active lifestyle is the biggest differentiator for Gen-Xers, with 29 percent of active Gen-X women being heavy purchasers of bras compared to 17 percent of sedentary women. Additionally, this is the only category in which a generation of less active women (Boomers) purchases more bras than their more active counterparts.

- **Fashion attitude.** Across the three generations, fashionable women are the most prolific purchasers of bras. Also, Millennials and Boomers purchase nearly double the number of bras as Gen-Xers.
Fashion-Focused Strategies

Knowing a shopper’s life stage, fashion attitude, and whether or not he or she has an active lifestyle can improve how brands and retailers connect with consumers across generations. Whether it’s breaking away from age-based merchandise in stores (no more “Young Contemporary” section) or using social media to create a personal mobile shopping experience, it’s important to cater to a certain life stage, rather than a certain age.

Apparel brands and retailers that continue to target Millennials as an age group are missing the mark. Millennials are not a homogeneous cohort. Traditional demographic data such as age and income do not tell the whole story. We have the capability to gather more information and gain a better understanding of the multi-dimensional consumer. Now, it is up to retailers and apparel brands to use the information and respond appropriately.

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