

Augustus Martin 

The Monthly Fashion Retail Insights Report

February 2023



Welcome to our Monthly Fashion Retail Insights

Every month we will publish this Retail Insights report, looking at a range of activities within Fashion Retail.

Content type will vary month to month, depending on the news that surfaces, but we will be looking at the following information:

- New store formats and concepts; the exciting new shopping environments
- Technology developments, what is new to the market in Fashion interactivity
- Industry reports; expert analysis and research into Fashion Retailing
- Innovations and trends emerging in Fashion Retail; what is new and exciting

So, let's get started with this month's issue.



Jigsaw launches repair re-wear service

Jigsaw has expanded its 'Jigsaw Forever' circular concept with the launch of its in-house REPAIR REWEAR service, as well as the opening of a pop-up shop for pre-loved fashion in partnership with resale and rental platform MyWardrobeHQ.

The REPAIR REWEAR service will be free of charge for one year from purchase of a garment, after which a small fee will be incurred for any repairs. Repairs will be carried out by mother and daughter duo, Karen and Tara, at the brand's Swindon warehouse.

Meanwhile a pop-up shop, in partnership with MYWARDROBEHQ, has been opened on Kensington High Street offering pre-loved and archive Jigsaw pieces and will remain open while stock lasts. Visitors to the shop will also have the chance to trade in old items in exchange for vouchers to spend in-store.

The moves follow on from the launch of Jigsaw Forever in partnership with MYWARDROBEHQ (MWHQ) in July 2022, which offers Jigsaw garments for resale and rental. As well as being able to rent individual items, the service also includes a subscription service allowing customers to refresh their wardrobes on a monthly basis with rented items. Customers can also use the platform to trade in pre-loved items in exchange for Jigsaw vouchers, the value of which is calculated depending on the category of item.

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New compostible clothing range is launched by **ex-adidas exec**

Fast fashion is big business, but it is also a big polluter, responsible for about 10% of global carbon emissions. Roughly 70% of the \$3 trillion fashion industry is comprised of articles made from synthetics or petrochemicals.

Unlike today's mostly petroleum-based clothing, you can compost these clothes. They're all made from 100% plant-based nutrients like recycled cotton, hemp, plant-based leather and coconut fiber, according to the company.

"We started the company because we're a bunch of fashion executives that got tired of the make, take, and throw away culture of fashion," said Eric Liedtke, CEO of Unless.

Unless has just one pop-up retail store in its home town of Portland, Ore., in addition to online sales. Liedtke hopes the company will grow along with the fast-rising consumer demand for greener products, and plans to collaborate with other brands as more companies look to combat fashion waste.

Tesco F&F fashion range relaunching with new agency

Tesco, the UK's largest supermarket chain, is reportedly modernising its F&F clothing line with the help of creative agency Bartle Bogle Hegarty London.

Following a switch from specialist agency Odd, the supermarket giant now plans to unveil the new creative vision with Bartle Bogle Hegarty London later this year. It has been working with the creative agency since autumn 2022, with a relaunch reportedly due in the second half of 2023.

Supermarket fashion lines are hugely benefiting during Britain's cost-of-living crisis as shoppers continue to look for cheaper alternatives for everyday expenses. Tesco's F&F, Tu Clothing from Sainsbury's, George at Asda, and Nutmeg from Morrisons are becoming significant players in the fashion retail industry due to their convenience and affordability.



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New Look launching re-fashion pre-used concessions in UK

Starting 28 January, consumers will be able to shop vintage and pre-loved items at Re-Fashion concessions within New Look stores in Coventry, Nottingham, Peterborough, Leicester, Loughborough and Wolverhampton.

The product offering will include New Look items, as well as Re-Fashion's range of second-hand products from brands including Adidas, H&M and Next.

Since November 2021, New Look customers can also donate their old clothes to Re-Fashion to receive a 30% off any purchase on the resale website.

Re-Fashion co-founder Steve Lyons, said: "Offering vintage and pre-loved fashion is a tangible way to create awareness and encourage more sustainable behaviours, easily accessible by all New Look customers."

New Look head of quality Sue Fairley, added: "I am delighted New Look are collaborating with Re-Fashion giving vintage and pre-loved items a new home, supporting our commitments to driving more circular business models and offering choice to customers who want to live more sustainable lifestyles."

Selfridges publishes Destination of the Future thinking

"In September 2022 future thinkers from across Selfridges Group came together to dream the department store of the future.

Mapping The Future took pace over three days in London, with Selfridges Group delegates from England, Ireland and The Netherlands exchanged ideas with writers, scholars, scientists, Buddhist nuns and business strategists to think differently about the future – to dream a new model and mindset for the retail industry that is boldly creative and radically sustainable.

The ideas explored during those three days shook the very foundations of what a business could be, and what the department store of the future could look like. To continue the creative thinking that began over those three days in September, Selfridges Group will be publishing work from festival contributors and future thinkers to create a space of bold imagining about the future.

Over the next few months, we will be posting audio pieces, essays, animations and films that harness the power of bold creativity and collective thinking, and that purpose new models and mindsets for the future we want to create."

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Harrods trials recycling scheme at H Beauty in Milton Keynes

Harrods is trialling a new scheme to help H Beauty customers at its Milton Keynes store to recycle their beauty cosmetics products.

Lasting for three months, the My Beauty Recycle & Reward pilot will allow for the recycling of two types of hazardous beauty products that are normally destined for landfill, as well as other used beauty products.

Customers will be incentivised to return a minimum of five used beauty products in order to access a range of beauty experiences and benefits as part of their membership of Harrods' My Beauty Rewards programme. This includes earning rewards points, exclusive offers and services, and discounts on beauty treatments at Drybar and Townhouse.

Harrods is working with its recycling partner MYGroup on the trial which will accept nail polish and fragrance bottles in a first for a UK beauty recycling scheme. Classified as hazardous products, they have previously been very difficult to recycle.

H Beauty customers in Milton Keynes will also be able to recycle items such as compacts, mascara and eye shadow containers, as well as shampoo and skincare bottles, lotion pumps and vitamin bottles.



Disney is opening a physical experience in London

Disney is opening an immersive experience outside of its theme parks to celebrate the Walt Disney Company's 100th anniversary in 2023.

The new temporary experience, called Wonder of Friendship, is available in London from 12 May through 21 May. It will later open in Berlin and Paris, with more locations to be announced.

Wonder of Friendship will offer 1,000 square metres of immersive installations across four themed rooms inspired by Alice in Wonderland, Lilo & Stitch, The Lion King and Mickey and Friends.

Using Snapchat's augmented reality (AR) technology, guests will bring Disney characters to life by scanning QR codes in each exhibit room.



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adidas opens the first Asian 'Home of Sport' store concept

As tourists begin to return to South Korea, Adidas has opened its largest flagship store in the country yet, in the bustling shopping district Myeong-dong.

Featuring the 'Home of Sports' concept – the first of its kind in the Asia Pacific – the flagship is the only local store that offers Adidas's full collection, including Sports Performance, Originals, and Y-3.

Spanning 2501sqm over two stories, the store was designed with a hint of local architectural elements and was planned to offer consumers what the brand describes as a sustainable, creative, and all-encompassing experience.

The first floor houses the Seoul Shop, the Seoul Lab, and Adidas Performance's running and training lines, while the second floor is home to Adidas Performance football, outdoor (Terrex), Adidas Originals, basketball, and Y-3 products.

In addition to one flagship and two brand centres in South Korea, Adidas said it is looking to open more physical locations and add virtual retail environments to provide greater consumer experiences.



Fraser Group introduces their own BNPL scheme

Fraser's Group will launch new financial services this year that allows shoppers to buy products through its own buy-now, pay-later (BNPL) scheme.

The retail group plans to lend customers up to £2,000 under its new "Fraser's Plus" brand, rolled out by new chief Michael Murray.

Under the new offer, shoppers will be able to split and defer payments or take a loan through the group's app that can be spent across its retailers, which include Sports Direct, House of Fraser, Jack Wills and more.

Customers will be rewarded with points when shopping with the group's new financial products with the retail giant hoping to replicate the triumph of Tesco's Clubcard loyalty programme.

Consumer loans will be facilitated through Studio Retail, a Financial Conduct Authority regulated firm acquired out of administration by Fraser's last year, whilst technology created by fintech startup Tymit, in which the retail group holds a 28% stake, will facilitate the BNPL payments.

Murray is thought to believe that Fraser's Plus' status as a regulated entity will set it apart from rival buy-now-pay-later providers such as Sweden's Klarna.

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6th Street launches new Middle Eastern phygital store

Text from Dalziel + Pow, the agency :

Bringing shoppable content, influences, and dynamic content to life. 6th street is a leading digital fashion platform in the Middle East for whom we've created a deeper connection with their community of influencers, followers, and everyday customers in real life.

We defined and created a new experience that is always on and alive with inspiration, with instant on-demand style, easy-to-browse and buy products, and shoppable storytelling. Ultimately creating an inspiring platform for trends, newness and collaboration.

The space brings a tactility to the ease of e-commerce with a flexible, future-facing backdrop, offering real energy and dynamism for the brand's online community, in IRL. All within a vibrant, visual and layered environment that reflects the world of online fashion.

Canada Goose launches rental programme with Selfridges

The rental edit, curated by the Selfridges buying team, features some of Canada Goose's "most loved styles" for men and women, including sustainable products the Cypress and Crofton puffers, vests and jackets made from 100% recycled nylon.

In addition, the rental line will feature its 'Kind Fleece' styles crafted from recycled wool and bio-based fibres and pieces from the Regeneration collection made from utilising surplus fabrics and upcycled materials.

Canada Goose added that that it would add new products and categories to the edit over, with plans to include seasonally relevant styles, including rainwear and windwear for spring. The edit is be available to rent for four, eight, 10 and 20-day periods.

Selfridges has previously said that skiwear is one of its most popular categories for rental among adults and by extension, we might assume that more general winter outerwear could be a winner at this time of year too.



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Harvey Nichols stops selling fur by the end of 2023

British department store Harvey Nichols has confirmed that it will stop selling fur by the end of 2023, following an investigation into fur farms by animal protection organisation Humane Society International.

The retail business previously introduced a fur-free policy in 2004, however in 2013 it dropped the policy and started selling fur products again. As of December 2022, Harvey Nichols was selling fur products from several brands including Yves Solomon, CP Company, Canada Goose, and Moncler.

The latter two companies have previously also made commitments to phase-out fur from their designs, with Canada Goose stating they would stop manufacturing fur at the end of 2022, and Moncler stating their last collection using fur will be autumn/winter 2023.

A spokesperson for Harvey Nichols commented: "As part of our ongoing review of these practices and continued sustainability initiatives, Harvey Nichols confirms that it will phase out the sale of fur or fur-trimmed products both online and in stores, to be completely fur-free by the end of 2023."



UK store vacancies fall for the fifth consecutive quarter

The number of vacant shops in the UK fell for the fifth consecutive quarter, and although the pandemic accelerated online shopping, the Office for National Statistics showed a clear shift back towards shopping in-store last year.

Some companies that bet big on online shopping growth were forced to make redundancies. Despite economic issues, bricks-and-mortar is showing signs it will continue to grow during 2023, powered partly by direct-to-consumer brands looking to make a physical connection with customers.

The number of unoccupied stores has dropped for the fifth consecutive quarter, according to vacancy rate figures from the BRC-LDC Vacancy Monitor.

The overall rate of store vacancies across Great Britain improved to 13.8% in the fourth quarter of 2022. This is 0.1% better than Q3 and 0.6% better than the same time last year.

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Ralph Lauren launches cashmere recycling scheme

Ralph Lauren has unveiled its first Cradle to Cradle Certified Gold cashmere sweater alongside the news it is launching a cashmere recycling programme in North America, the UK, and Europe.

The cashmere sweater is “to be worn, loved and live on responsibly for generations to come,” and will be available in men’s Purple Label and women’s Collection brands.

The sweater is woven from fine cashmere fibres, dyed in rich hues and features a label cut from organic cotton. The Cradle to Cradle Certified Gold Cashmere Sweater was analysed through a multi-step certification process with the Cradle to Cradle Products Innovation Institute, a non-profit that has set the global standard for products that are safe, circular and made responsibly.

The certification is based on a product’s performance across five critical areas of sustainability: material health, product circularity, clean air and climate protection, water and soil stewardship, and social fairness.

What do you think?

We hope you enjoyed reading the Augustus Martin Monthly Fashion Insight report.

We welcome your feedback and thoughts; The report is a new initiative, and we are keen to evolve it to suit your interests and area of focus.

If you wish to discuss any in-store communication projects or challenges, please get in touch.

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