Apparel ~~2030~~ 2025: What new business models will emerge?

STYLE 0142
$ 89.99
SIZES:
5
5.5
6
7
7.5

New | Used | Rent
Off the Rack
Customize

New | Used | Rent
Off the Rack
Customize

STYLE 0179
$ 109.99
SIZES:
5.5
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New | Used | Rent
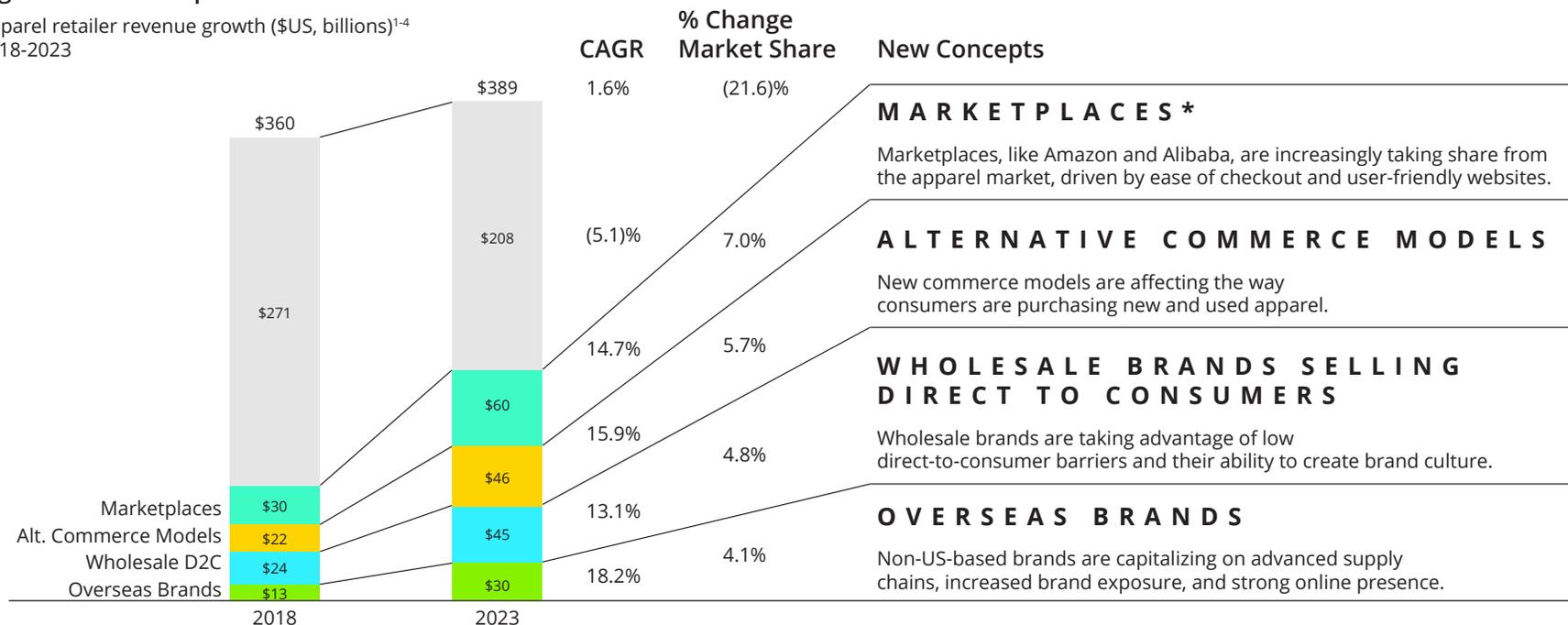Off the Rack
Customize

Deloitte.
Digital

Scenario planning: Envisioning possible futures—and crafting winning strategies for each

The apparel industry is undergoing exponential change, which the COVID-19 crisis will only accelerate through store closures and increased unemployment. Our hypotheses in this article, originally intended as scenarios for 2030, are based on research conducted prior to the downturn. Recent events increase the likelihood that these predictions will come to pass even sooner—perhaps as soon as 2025.

Even before COVID-19, Deloitte research estimated that apparel incumbents in the United States could lose as much as 25% of their market share to new rivals as well as new commerce models[1]. The emerging competition includes marketplaces, such as Amazon and Alibaba, that are using transactional data to launch competitive products; alternative commerce models like subscription services, apparel rentals, and recommerce (used-clothing sales); wholesalers going directly to consumers; overseas retailers; and pure internet players. Apparel industry players around the globe can expect to be affected by these same forces (figure 1).

Figure 1: New competitors will take share from incumbents

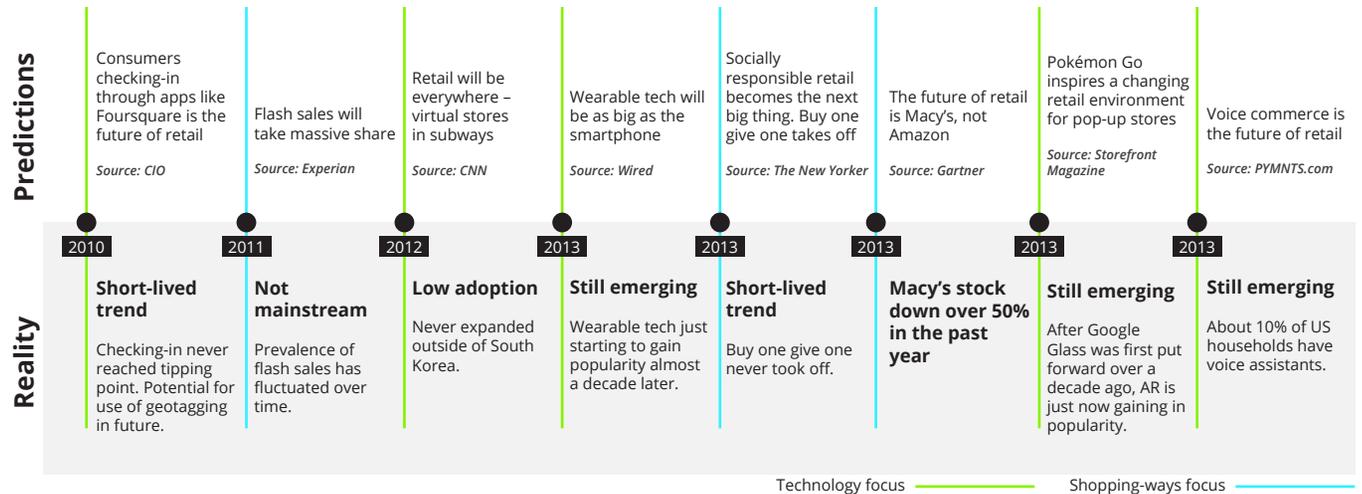Apparel retailer revenue growth ($US, billions)[1-4] 2018-2023

	CAGR	% Change Market Share	New Concepts
	1.6%	(21.6)%	**MARKETPLACES*** Marketplaces, like Amazon and Alibaba, are increasingly taking share from the apparel market, driven by ease of checkout and user-friendly websites.
	(5.1)%	7.0%	**ALTERNATIVE COMMERCE MODELS** New commerce models are affecting the way consumers are purchasing new and used apparel.
	14.7%	5.7%	**WHOLESALE BRANDS SELLING DIRECT TO CONSUMERS** Wholesale brands are taking advantage of low direct-to-consumer barriers and their ability to create brand culture.
	15.9%	4.8%	
	13.1%		**OVERSEAS BRANDS**
	18.2%	4.1%	Non-US-based brands are capitalizing on advanced supply chains, increased brand exposure, and strong online presence.

Chart values: 2018 — $360 total ($271, $30 Marketplaces, $22 Alt. Commerce Models, $24 Wholesale D2C, $13 Overseas Brands); 2023 — $389 total ($208, $60, $46, $45, $30)

As stores reopen and market volatility eventually subsides, progressive thinkers will contemplate what the industry might look like in the next five to ten years, and how the crisis will accelerate its transformation. Which business models will prevail? Who will lead the pack? We have already seen True Religion[2] and Neiman Marcus[3] file for bankruptcy—who else will follow? Of course, predicting the future is a fool's errand, especially predictions made during economically uncertain times that center on the speed of adoption of new technologies or new business models (figure 2).

Figure 2: Retail predictions vs retail reality

Predictions

Consumers checking-in through apps like Foursquare is the future of retail

Source: CIO

Flash sales will take massive share

Source: Experian

Retail will be everywhere – virtual stores in subways

Source: CNN

Wearable tech will be as big as the smartphone

Source: Wired

Socially responsible retail becomes the next big thing. Buy one give one takes off

Source: The New Yorker

The future of retail is Macy's, not Amazon

Source: Gartner

Pokémon Go inspires a changing retail environment for pop-up stores

Source: Storefront Magazine

Voice commerce is the future of retail

Source: PYMNTS.com

| 2010 | 2011 | 2012 | 2013 | 2013 | 2013 | 2013 | 2013 |

Reality

Short-lived trend

Checking-in never reached tipping point. Potential for use of geotagging in future.

Not mainstream

Prevalence of flash sales has fluctuated over time.

Low adoption

Never expanded outside of South Korea.

Still emerging

Wearable tech just starting to gain popularity almost a decade later.

Short-lived trend

Buy one give one never took off.

Macy's stock down over 50% in the past year

Still emerging

After Google Glass was first put forward over a decade ago, AR is just now gaining in popularity.

Still emerging

About 10% of US households have voice assistants.

Technology focus ——————   Shopping-ways focus ——————

Nevertheless, apparel players can still prepare for the future. How? When planning how to emerge from the downturn, they can analyze the trends shaping the industry (both those independent of, and those accelerated by, COVID-19) and identify the most viable scenarios that could change their business models. Armed with those insights, they can assess road signs indicating which scenarios may be most likely to materialize, and pinpoint capabilities needed to succeed in each scenario.

With these realities in mind, we identify some of the key emerging trends that could affect the apparel industry most dramatically by 2030. We describe four scenarios that could become reality, depending on which directions the trends take. Then, we explore how industry players' key functions (such as merchandising, product development, supply chain, and channels) will be affected in each scenario. Finally, we delineate the road signs that companies should watch for— to gauge which scenarios may most likely emerge by 2030, so they can build the capabilities required to succeed.
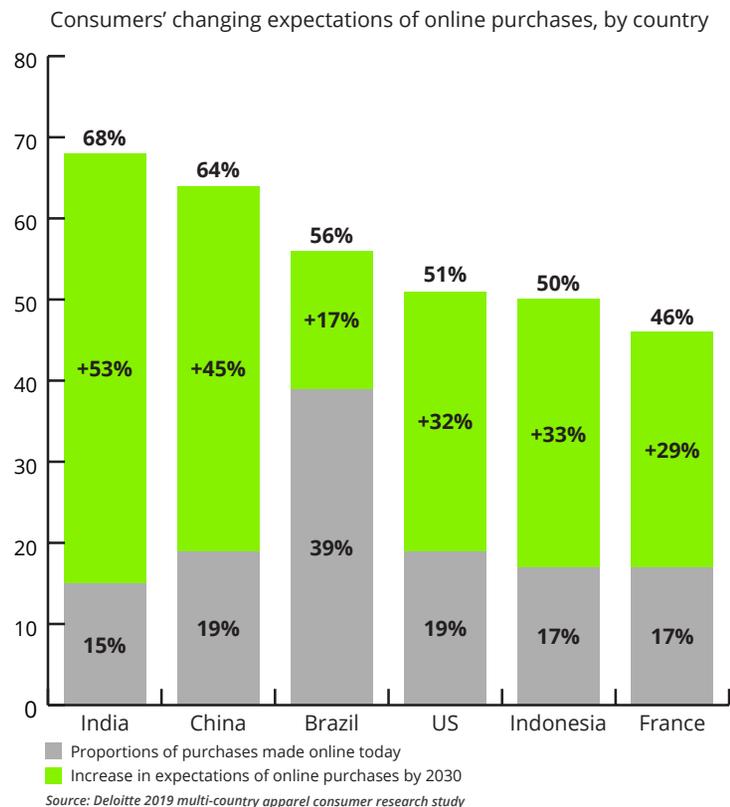
ABOUT OUR RESEARCH

This article draws on primary and secondary research into trends in the apparel, footwear, and accessories industry. We tested our hypotheses using a global survey that had approximately 7,000 respondents in six key markets: Brazil, China, France, India, Indonesia, and the United States. The survey asked respondents to consider their current shopping patterns and behaviors as well as their predictions for how their behaviors will shift by 2030. Please note, research for this study was completed in 2019, prior to the COVID-19 crisis in the Spring of 2020.
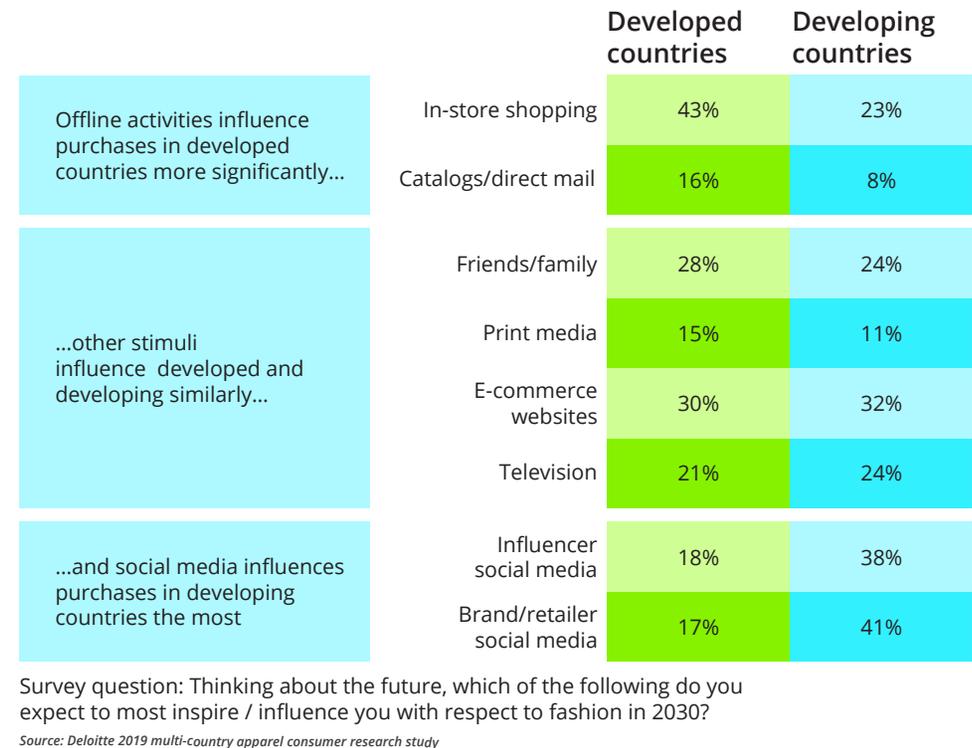
Two trends that could transform the apparel industry

A number of trends, driven by advances in digital tools and technologies, are coalescing to transform the apparel-industry landscape. These trends include the increasing impact of social influencers, faster fashion, higher discounting, more direct-to-consumer moves and global expansion by brands, and (of course) increasing e-commerce. Several of these trends are emerging at similar speeds around the globe. Others are gaining traction more rapidly in developing markets owing to the lack of infrastructure alternatives (figures 3 and 4).

Figure 3: Online purchasing of clothing, accessories, and footwear is on the rise

Consumers' changing expectations of online purchases, by country

Legend:
- ■ Proportions of purchases made online today
- ■ Increase in expectations of online purchases by 2030

Data (online today / increase by 2030 → total):
- India: 15% / +53% → 68%
- China: 19% / +45% → 64%
- Brazil: 39% / +17% → 56%
- US: 19% / +32% → 51%
- Indonesia: 17% / +33% → 50%
- France: 17% / +29% → 46%

Source: Deloitte 2019 multi-country apparel consumer research study

Figure 4: Primary inspiration/influencers of apparel purchases vary across countries

Offline activities influence purchases in developed countries more significantly…

…other stimuli influence developed and developing similarly…

…and social media influences purchases in developing countries the most

	Developed countries	Developing countries
In-store shopping	43%	23%
Catalogs/direct mail	16%	8%
Friends/family	28%	24%
Print media	15%	11%
E-commerce websites	30%	32%
Television	21%	24%
Influencer social media	18%	38%
Brand/retailer social media	17%	41%

Survey question: Thinking about the future, which of the following do you expect to most inspire / influence you with respect to fashion in 2030?

Source: Deloitte 2019 multi-country apparel consumer research study

While most of these digital trends likely will accelerate given the change in buying behaviors due to COVID-19, we maintain that two trends, in particular, will exert a disproportionate impact on the apparel industry's operating model in the coming decade: customized apparel and alternative commerce models.

TREND I: CUSTOMIZED APPAREL

Many consumers today have some ability to customize apparel to their own liking. Certain basic forms of customization—think monograms and custom tailoring in the luxury men's suiting market—have been available for a long time, for a price premium. More sophisticated forms, such as personalized recommendations based on past shopping behavior, or crowdsourcing of new personalized styles, are newer.
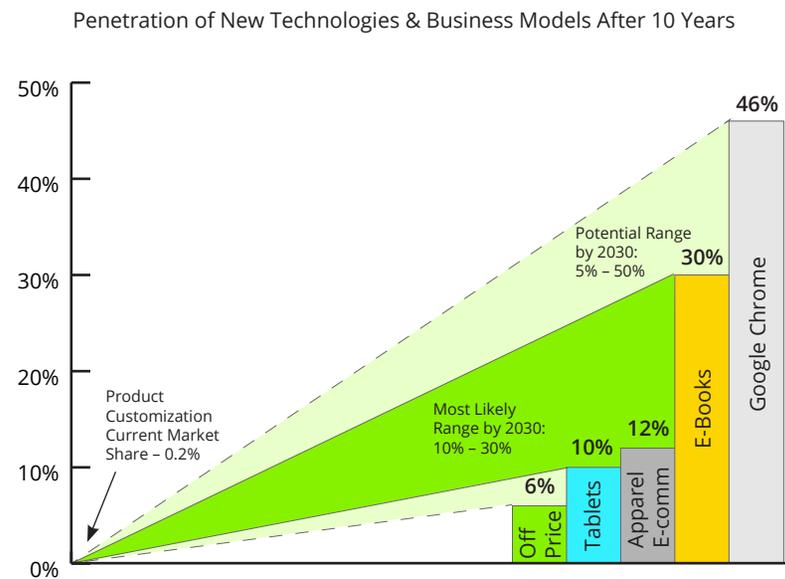
However, this trend has the potential to take off. Why? Technology has put us on the cusp of enabling consumers to modify every aspect of each article of clothing—including trim, sizing, materials, and even fundamental design. Smaller players like Zozo, MTailor, and Within24 are already experimenting with clothing customized for the exact measurements of an individual consumer's body. What's more, 3D printing across industries is experiencing rapid growth; revenues of 3D printing overall are expected to jump from $16 billion in 2019 to $36 billion by 2024[5]. Thus, fully customizable fabrics could become mainstream by 2030. For example, the Netflix hit show "Next in Fashion" highlighted fully bespoke customized 3D printed fabrics.

Indeed, while only 15 percent of consumers said they tried customized clothing in 2019, 33 percent reported expecting to try it in the future. Drawing on our analysis of how quickly emerging business models have been adopted in the past, we estimate that players offering fully customizable apparel could claim 10 to 30 percent of market share by 2030 (figures 5.1).

Retailers would likely embrace this change, with customization reducing the risks of being over inventoried. And with health concerns surrounding the crisis (e.g., limiting in-person shopping), the migration to customization may accelerate in the near term. We note that customization may vary significantly by geography, as demonstrated by Deloitte's 2019 fashion-consumer survey (Figure 5.2).[5]

# Fully customizable apparel could claim 10 to 30 percent of market share by 2030.

Figure 5.1: Product customization could claim more market share by 2030

Penetration of New Technologies & Business Models After 10 Years

Product Customization Current Market Share – 0.2%

Potential Range by 2030: 5% – 50%

Most Likely Range by 2030: 10% – 30%

- Off Price: 6%
- Tablets: 10%
- Apparel E-comm: 12%
- E-Books: 30%
- Google Chrome: 46%

Source: Euromonitor USA Apparel and Footwear Data Jan 2019 (File), GlobalStats. SEC-10K Filings for Ross and TJX, Statista

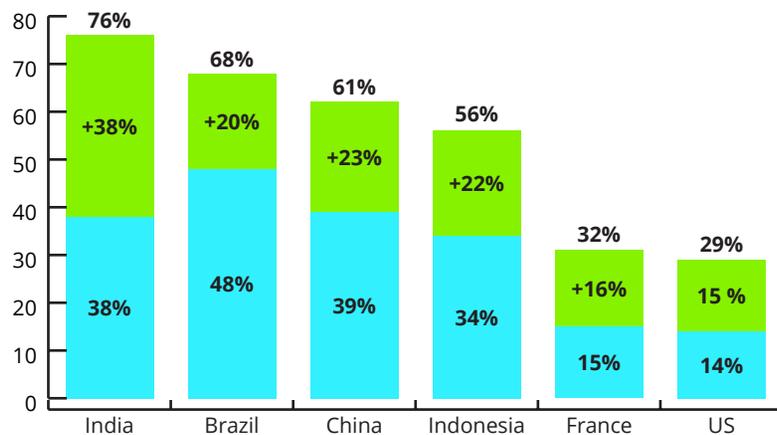## Figure 5.2: Consumers expect to buy more customized products

Consumers' expectations regarding proportion of customized purchases in 2030, by country

Country	Percentage
India	52%
Indonesia	39%
Brazil	34%
China	28%
France	23%
US	21%
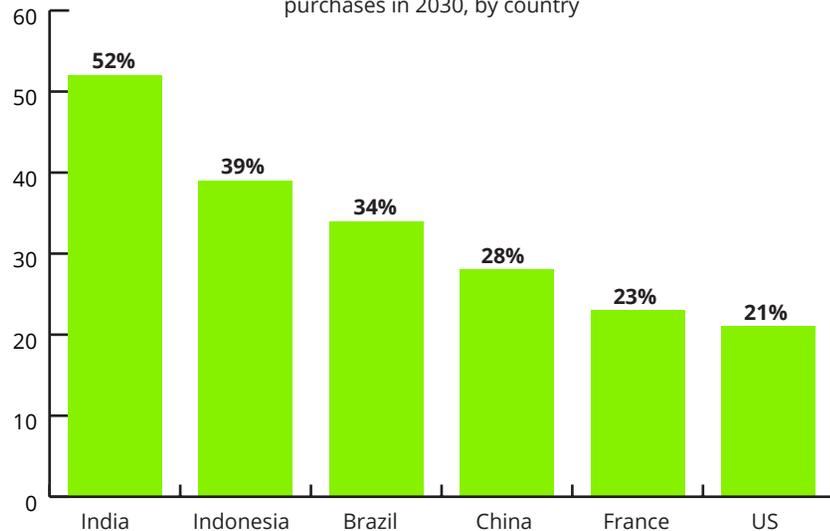
Source: Deloitte 2019 multi-country apparel consumer research study

Figure 6: Clothing rental is expected to increase, particularly in developing countries

Consumers' changing expectations of rental, by country

Country	Total	Increase in expectations of rentals by 2030	Percent of consumers who have tried rental today
India	76%	+38%	38%
Brazil	68%	+20%	48%
China	61%	+23%	39%
Indonesia	56%	+22%	34%
France	32%	+16%	15%
US	29%	15 %	14%

■ Increase in expectations of rentals by 2030
■ Percent of consumers who have tried rental today

Source: Deloitte 2019 multi-country apparel consumer research study

A wealth of new options is emerging for how consumers buy and use apparel. For example, they can rent clothing or buy used clothing, for formal occasions or everyday use. They can subscribe to services that periodically ship collections of curated apparel and footwear to them. And they can buy clothing directly on social media platforms they use. Consider recommerce. Over the past five years, recommerce revenues have grown 20-plus times faster than overall apparel revenues.[6] Deloitte research estimates that 20% of consumers have bought used clothing.[7] Similarly, consumers expect to rent more of their clothing by 2030, particularly in developing markets (figure 6).

Alternative commerce models could take as much as 9 percent share by 2023, 10-30 percent share by 2030, and significantly higher percentages after 2030.

Such options are particularly attractive to consumers striving to keep pace with increasingly fast-changing fashion trends driven by social media. The options also appeal to those who are spending less of their disposable income on apparel and more on technology, out-of-home entertainment, and other categories. From 1997 to 2017, the portion of disposable income that US consumers spent on apparel dropped from 4 percent to 2 percent.[8] So perhaps it's not surprising that 40 percent of our survey respondents said they would turn to recommerce because of its affordability. Consumers who are concerned about environmental sustainability may also show more interest in these options. Indeed, in the US and UK, as much as 50% of the respondents said they'd be more likely to buy clothes from companies that are committed to sustainability.[9]

While the COVID-19 crisis may temper the rapid growth of recommerce in the short term due to concerns regarding apparel decontamination, the heightened unemployment and challenging economic environment will likely shift more to recommerce as a means of stretching a limited budget over the next few years.

We estimate that alternative commerce models could take as much as 9 percent share by 2023, 10-30 percent share by 2030, and significantly higher percentages after 2030 (figure 7).

Figure 7: Alternative commerce models will gain market share

Historical and projected market size growth of alternative commerce models

	2016	2018	2023(e)
Market Size	$356B	$360B	$389B
Alternative Share	3.3%	4.4%	9.0%

■ Recommerce ■ Subscriptions ■ Rentals
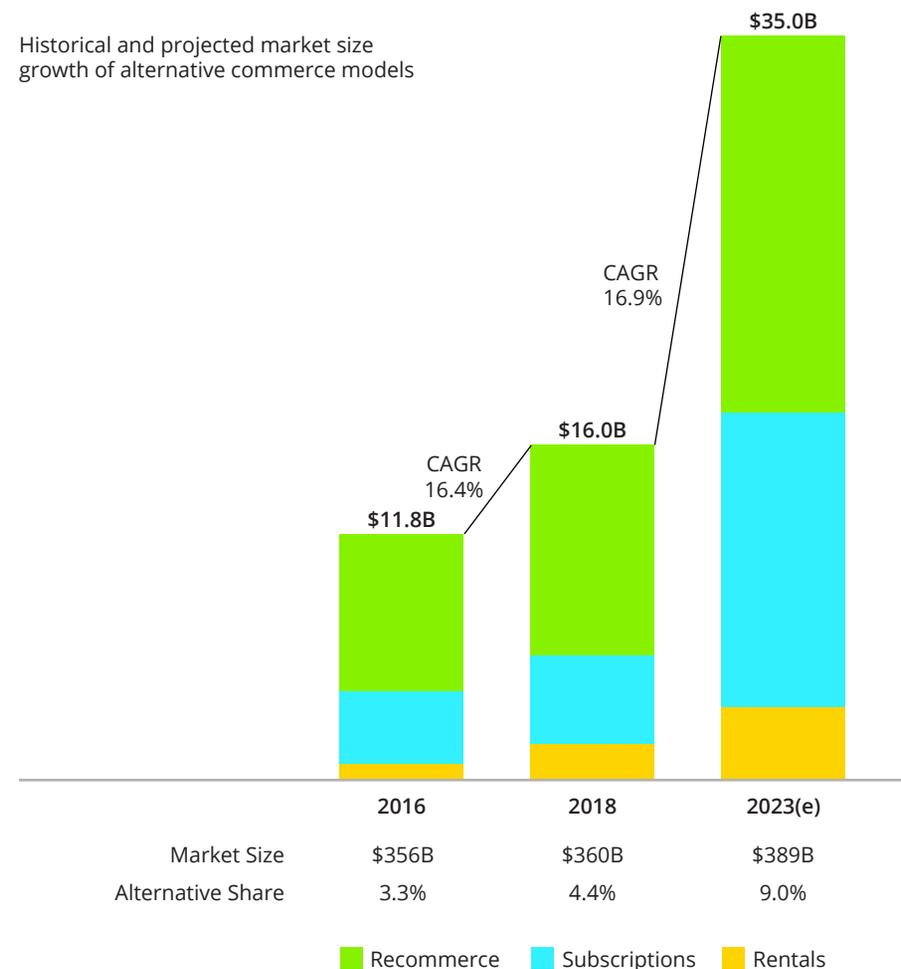
Source: Deloitte's Annual Apparel Trends 2019

Four possible scenarios for 2030

We can't know today whether each of the two above-mentioned disruptive trends will move from niche to mainstream by 2030. Nevertheless, we can envision four distinct scenarios, depending on whether one or both of the trends become mainstream (figure 8). Each scenario will trigger changes in key functions within the industry: product design and merchandising, sourcing, supply chain, marketing, and channel management (stores and e-commerce). Below, we take a closer look at each scenario, and consider the implications for industry players.

Figure 8: A variety of scenarios could emerge in 2030

Product customization

High Prevalence

One-of-a-kind product

- Clothing made to individual body specification
- Consumer customization of styling (fabric, color, trim, etc.)

II

Ultimate consumer choice

- Consumers can select fully customized apparel (size and style)
- Consumers can (and often will) change every aspect of retail, including how and what they buy

IV

Incremental Change

Continued trajectory

- Standard sizes remain; personal avatars improve fit
- Customization of apparel remains niche
- Subscriptions, rentals, and recommerce grow slightly

I

Widespread usage options

- Subscription, rental, and recommerce constitute a majority of transactions

III

Incremental Change — High Prevalence

Alternative commerce models

Source: Deloitte research

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SCENARIO I: CONTINUED TRAJECTORY

In this scenario, the world will revert to nearly normal once our economies have absorbed the shock of COVID-19. Consumers will return to their former consumption habits, and product customization, as well as alternative commerce models, will continue to grow slowly and remain niche rather than becoming mainstream. However, consumers may choose to customize certain aspects of the apparel they're buying. Though standard sizes will still exist, use of personal avatars will make good fits much more likely. Companies will continue merchandising for, and marketing to, consumer segments (such as families with young children or millennials in the city). However, segments will be more sharply differentiated, and smaller microsegments will emerge.

Impacts on key functions

Design and merchandising
- Merchandising is increasingly designed and sorted based on more sophisticated microsegments.

Sourcing
- Some consumers are willing to pay a premium for customized apparel, so companies (but primarily luxury players) invest accordingly in this capability.
- Specialists such as Rent the Runway and ThredUp continue to take share.

Supply chain
- Avatars (in stores or online) make sizing considerably easier, though sizing is still limited to size grid for individual consumers.
- Retailers shift from large distribution centers to smaller city center hubs with inventory closer to consumers for faster delivery.
- Reverse logistics declines in importance as returns from incorrect sizing fall.

Marketing
- Use of exclusive partnerships with influencers increases (starting with gifts and progressing to compensation) to promote brands, though influencers' impact on purchasing differs across geographies.
- As product availability and pricing become more transparent, industry players differentiate themselves through the experience they provide customers. Examples include seamless transition between channels and experiential loyalty programs (such as invitations to trunk shows).

Channel management
- Stores continue to play an inventory-fulfillment role for the majority of consumers who still shop for ready-to-wear apparel.
- Integrated demand planning and microsegments enable more strategic assortment, with e-commerce as the lead channel and stores more curated and experiential.
- Value-added services and customer experience increase in importance.

SCENARIO II: ONE-OF-A-KIND PRODUCT

In this scenario, it will be common for retailers to offer custom clothing for consumers to fit to their unique body specifications and style preferences. However, alternative commerce models will remain niche, perhaps because consumers are unwilling to share or exchange clothing due to persistent health concerns about contamination. Much inventory will be made-to-order, with a small upcharge for customization and delivery within days. Consequently, retailers will need to invest less in inventory, and markdowns from clearance sales will decrease. The role of the merchant, supply chain, and store will evolve.

Impacts on key functions

Design and merchandising
- Merchants pre-select styles and additional customization features such as fabrics, dyes, and trims based on consumer insights and crowd sourcing.
- While many designs are influenced by trends a year before sale, social influencers impact consumers' customization choices near time of purchase.

Sourcing
- Technologies such as robotic manufacturing and 3D printing lower manufacturing costs by reducing the need for labor.
- Apparel companies invest in these technologies and have flexible sourcing to accommodate the alternative options available to consumers (in features such as patterns, trims, and buttons).

Supply chain
- Apparel companies shift from overseas transport of finished goods to transport of customized component materials for 3D manufacturing at regional facilities or stores.
- Since customized clothing sizing is made to fit each customer, product returns decrease, along with the need for reverse logistics.

Marketing
- Brands and retailers focus on boosting consumers' awareness of the customization option and helping them to make choices.
- Shift from heavy promotional activity to inspiring consumers with customization possibilities.

Channel management
- Stores expand their customer service offerings to help consumers make customization choices and size measurements.
- Instead of inventory depots with heavy self-service, stores serve as showrooms where consumers can experience samples, receive help with customization, and order items shipped, versus buying and taking them from the store.
- Websites and apps include customization capabilities in addition to showing all available styles and size combinations.

SCENARIO III: WIDESPREAD USAGE OPTIONS

In this scenario, product customization will remain niche, but alternative commerce models will become mainstream. These alternative models may occur if, for instance, consumers turn to recommerce to manage diminishing clothing budgets in light of lingering job losses. Consumers will be able to consume apparel in whatever manner they choose—for an hour, a day, or a week. They may even rent or sell clothing in their closet to like-sized individuals.

Impacts on key functions

Design and merchandising
- Retailers invest in automated assessment tools and capabilities essential for buying back used clothing, and optimize pricing by evaluating items' popularity and current condition.
- Consignment gains momentum as retailers shift used-inventory risk to consumers.

Sourcing
- As used clothing serving multiple owners extends product life, companies focus on improving quality and craftsmanship in their products, knowing that "resale value" is a strong motivation for purchasing.
- Demand for designers' brands remains high.

Supply chain
- Customers demand faster delivery of used or rented clothing.
- Companies therefore work to excel at reverse logistics, strengthen their cleaning, repair and sterilization capabilities, and deploy technology (such as drones) to provide same-day delivery.

Marketing
- Consumers' social media interactions powerfully influence their preferences, so companies sell through new and emerging channels (such as Instagram and WeChat) and court influencers on these platforms. Companies set up peer-to-peer networks comprising individuals with similar fit.

Channel management
- Retailers' store floor as well as digital offerings and payment solutions accommodate new and used apparel (some on consignment).
- They provide both stock and alternative offerings, with rental, subscription, and purchase options.
- Websites offer ratings systems for users to buy products as well as describe and actively promote them.
- Marketplaces flourish as consumers sell directly to other consumers

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SCENARIO IV: ULTIMATE CONSUMER CHOICE

This scenario will see both product customization and alternative usage options dominate the apparel-industry landscape. The entire apparel retail chain will be retooled to serve individual consumers who can change every aspect of their experience with the industry—customizing their apparel look and sizing, as well as selecting recommerce, new, rental, or subscription options.   Given the COVID-19 crisis, this scenario may have greater probability of becoming a reality.

Impacts on key functions

Design and merchandising
- Most inventory is made-to-order or will have multiple owners. Thus merchandising includes made-to-stock, made-to-order, and sold inventory already in consumers' closets.
- Retailers invest in tools and capabilities essential for buying back and pricing used clothing.

Sourcing
- Robotics and 3D printing lower costs by reducing the need for labor.
- To achieve cost leadership, industry players invest in automated onshore manufacturing, while also improving quality and craftsmanship of their products.
- Time to market attains record speed.

Supply chain
- Companies strive to excel at reverse logistics to accommodate returns after almost every wear.
- They also build cleaning and repair capabilities and provide 'round-the-clock delivery for consumers who need an outfit immediately.

Marketing
- Marketers devise strategies targeting very small consumer segments, including tailoring recommendations for products and channels to "segments of 1."
- Companies set up peer-to-peer networks of those with similar body types.

Channel management
- Stores serve as showrooms for consumers seeking to evaluate products before deciding whether to customize, buy used, or rent.
- Marketplaces flourish as consumers can obtain customized products to match their need (for instance, clothing used during a one-hour photo session or kept for a long period).

Watching for road signs

Which of the four apparel-industry scenarios will most likely materialize in 2030? We can't know for sure, but we can look for "road signs" to gain insights on whether product customization and/or alternative models for buying and using clothing will see wide adoption.

So, let's revisit each of our two trends, and ask, "What would we see happening in the industry to conclude that this trend is gaining momentum?"

ROAD SIGNS FOR TREND I: CUSTOMIZED APPAREL

The following road signs could suggest that apparel customization is gathering momentum:

- **Technology**: Avatar and 3D printing technology can produce a variety of clothing whose fit to consumers' bodies is similar to or better than that of clothing purchased off the rack.

- **Premium**: Customized apparel is sold at less than a 40 percent premium to similar off-the-rack apparel.

- **Time-to-market**: Time-to-market, from (customized) design to delivery (to customer), continues to accelerate and shrinks to less than two weeks.

- **Labor costs**: Foreign labor costs and/or tariffs increase for apparel, shifting production to more closely match demand and making automated 3D printing price competitive.

- **Returns**: Retailers start imposing restrictions or significant charges for ordering multiple sizes or for excessive returns.

Some industry players are already demonstrating behaviors pointing in this direction. For example, Amazon recommends outfits for consumers through use of Echo Look[10], while Under Armour is working on creating better fit through the use of avatars[11]. Meanwhile, J Hilburn can fulfill custom-fit clothing orders in just two to five weeks[12]. Finally, Ministry of Supply uses 3D printing to create customized knitted items[13].

ROAD SIGNS FOR TREND II: ALTERNATIVE COMMERCE MODELS

These road signs could indicate that alternative models for buying and using apparel are gathering momentum:

- **Decontamination**: Mitigation of current heightened concerns of used clothing contamination.

- **Last-mile shipping costs**: Round-trip shipping costs decline to $5 or less, making clothing rental much more economical, which supports increased adoption of this model.

- **Physical recommerce and rental locations**: Multiple physical locations close to consumers, and/or websites, offering recommerce and rental options matching most consumer needs.

- **Transparency of sizing**: Technology enables consumers to know whether a certain brand/size/style will fit them without the need to physically try on clothing.

- **Social media direct purchase**: Direct purchasing on social media grows from select brands on Instagram today, to numerous brands offering direct purchasing on social media.

- **Fashion cycle**: Fashion cycle continues to accelerate, pushing used clothing and rentals, as consumers cannot afford to buy for all seasons.

- **Economic Challenges**: Long-term economic challenges drive consumers to used clothing.

Again, some companies are dipping a toe into these waters. For instance, Amazon estimates that drones could reduce last-mile shipping costs by as much as 80 percent.[14] Alphabet's Wing service has begun rolling out drone deliveries for Walgreens and FedEx.[15] Some businesses are also offering in-store returns enabled by third-party logistics providers that feature "return bars," a move that further lowers costs and streamlines processes essential for recommerce. For instance, in the first six months of introducing Worn Wear, Patagonia's recommerce business line, the company sold $1 million worth of used clothing.[16] And when it comes to stores being used as showrooms, as we've seen, some retailers are already pulling ahead of the pack.

Questions for your next meeting

What does all this analysis of powerful global trends, possible scenarios, and potential road signs mean for apparel-industry players? The short answer is: Companies throughout the industry's value chain should consider a new way of thinking about the future. Forward-thinking companies will closely monitor shifts in trends suggesting where the industry will land in 2030. And they'll be able to craft savvy strategies for building the capabilities needed to succeed in that future landscape—no matter which scenarios come to pass.

With this approach in mind, consider exploring questions such as the following as the world emerges from these uncertain times and data begins to become available:

- What retail orthodoxies should we challenge? How can we sell different things, differently? How can we minimize our inventory risks?

- What do our customers' choices and behaviors suggest about their future preferences and needs?

- What scenarios do we think will most likely emerge by 2030 or even sooner? Why?

- Which scenarios would present the toughest challenges for us, given how we operate today? Why?

- What capabilities would most help us overcome our challenges and succeed in those scenarios? How can we develop or acquire those capabilities?

- Given where we sit in our industry's value chain, which road signs are most important for us to monitor? How can we best stay on top of these?

Yes, exploring these and other crucial questions takes time, thought, and candid discussion. But given the transformative nature of the trends we've examined, companies can't afford to avoid this work. Progressive business leaders have already initiated this analysis—sweetening the odds that their company will not just survive, but thrive in 2030.

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Kerri Sapp has over 10 years of experience working with leading retailer and consumer product companies. She brings a strategic and customer perspective when helping clients develop solutions to key questions across core functions within the retail business – including merchandising and assortment planning, digital and traditional marketing, and physical store operations.

1 "Key Trends in Apparel & Footwear," Spring 2019, Deloitte.

2 "True Religion files for bankruptcy – again – as Coronavirus hobbles retail industry," Forbes, April 13, 2020.

3 "Neiman Marcus, a symbol of luxury, files for bankruptcy" New York Times, May 7, 2020.

4 2019 Deloitte multi-country apparel consumer research survey

5 TJ McCue, "Significant 3D Printing Forecast Surges to $35.6 Billion," Forbes, March 27, 2019.

6 ThredUp 2019 Fashion Resale Market and Trend Report.

7 2019 Deloitte multi-country apparel consumer research survey.

8 "Amazon's Echo Look style assistant is now available to all," Engadget, June 6, 2018.

9 "How body mapping makes Under Armour, J. Crew a better fit with shoppers," Alvanon, May 3, 2019.

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