✳ GLAMI
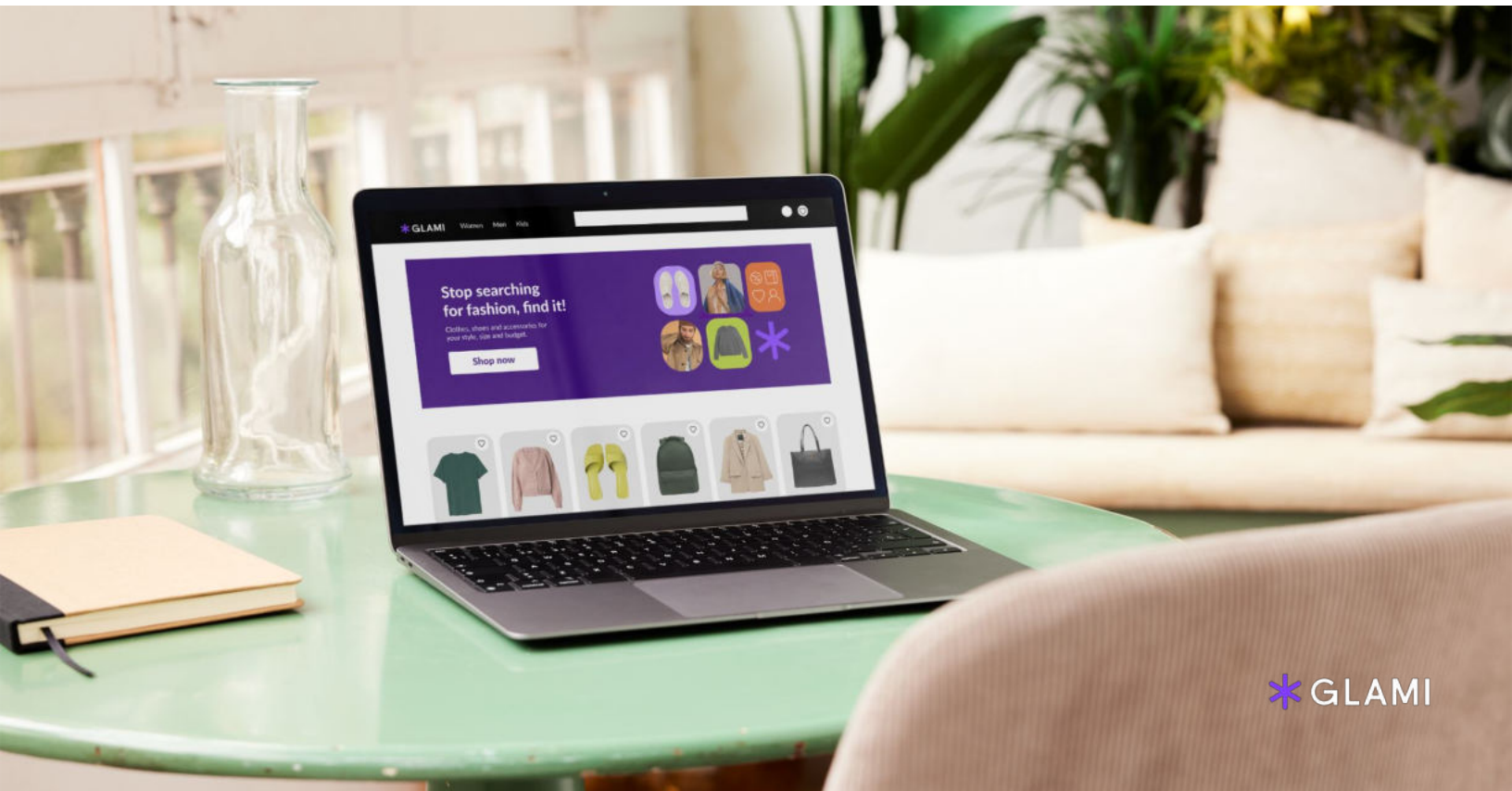
YEAR IN REVIEW

*Fashion E-commerce:
a Recap of 2023 and
Insights in Early 2024*

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Fashion
E-commerce 2023

2023: a Year of Uncertainty

In the beginning of 2023, a positive outlook permeated the atmosphere, heralding it as the first "business as usual" year after the revival of 2021-2022. Contrary to initial expectations within the fashion e-commerce industry that 2023 would represent a period of respite and recovery from post-pandemic turbulence, the year unfolded with a mix of challenges.

The beginning of the year was marked by delayed growth. According to McKinsey, fashion market expanded by 5% in the first half of 2023. However, the second half saw a noticeable decline in consumers' purchase intent. But despite economic slowdowns and high inflation in European countries, the fashion market still managed to maintain a positive growth trend of 1-3% even in the second half of the year.
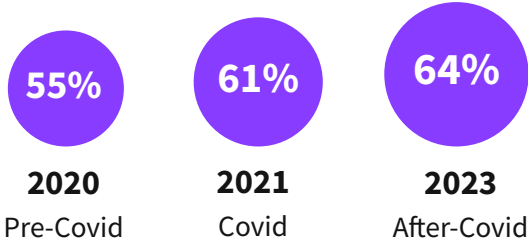
Year-on-year growth of retail sales for non-luxury fashion

+9% +13% +5% 1-3% 1-3%

H1 H2

-18%

2020 2021 2022 2023 2024
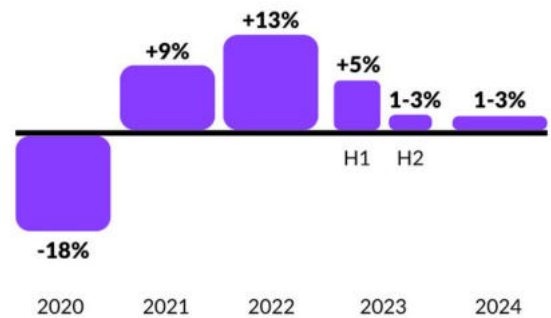
Source: The State of Fashion 2024 by McKinsey & The Business of Fashion

Consumers sustained their online shopping habits after COVID

Share of respondents shopping mostly online

55%
2020
Pre-Covid

61%
2021
Covid

64%
2023
After-Covid

Encouragingly for the e-commerce sector, customers who adopted online shopping during the COVID-19 pandemic have largely sustained these purchasing habits. As per the GLAMI survey, 64% of respondents predominantly shopped online in 2023.

More and more people prefer to shop online and try clothes at home

60% Trying products at home and returning them if needed **V.** **30%** Going to physical store and trying products there

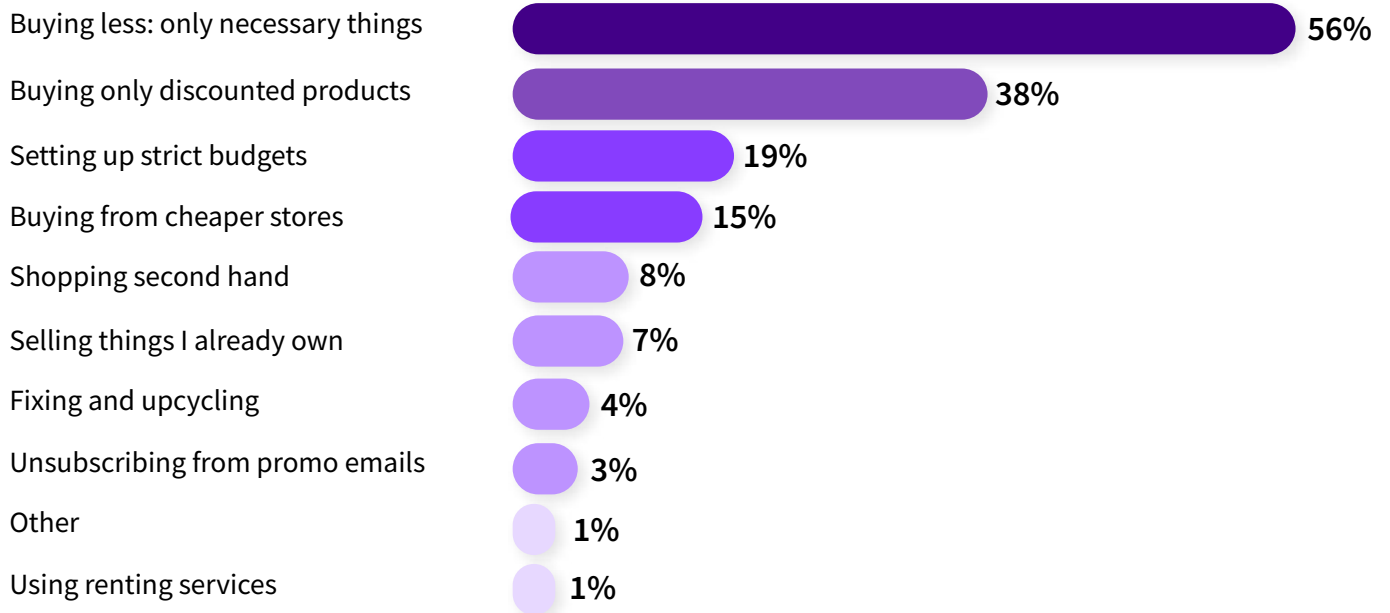*Answers for a question ""What is more comfortable for you?". 10% responded "Not sure" or "Depends".*

Source: GLAMI survey across more than 30 000 internet shoppers, 01/2024. Survey run in 9 countries: Italy, Czechia, Slovakia, Greece, Romania, Hungary, Croatia, Slovenia, Bulgaria.

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1. Intricate Ways to Spend Less

According to a recent GLAMI survey, 80% of respondents noticed an increase in prices for clothes and shoes, with half of them describing it as a significant rise. As a result 50% of participants reported reducing their spending on clothing and shoes in 2023.

50% of respondents claimed they cut their spending on clothes and shoes in 2023

Question: Were you trying to spend less on clothes and shoes by:

Buying less: only necessary things	**56%**
Buying only discounted products	**38%**
Setting up strict budgets	**19%**
Buying from cheaper stores	**15%**
Shopping second hand	**8%**
Selling things I already own	**7%**
Fixing and upcycling	**4%**
Unsubscribing from promo emails	**3%**
Other	**1%**
Using renting services	**1%**

Ultra fast fashion

In addition to Chinese Shein, another new player – Temu – entered European market. 32% of respondents have already shopped for fashion on these websites.

Premium is strong

34% of shoppers are just as willing to invest in premium pieces as before, while 32% are even more willing to invest in premium quality, as such products tend to last longer.

Fashion on credit?

Only 12% of consumers used payment in installments when shopping for fashion. 21% are open to trying it, while 51% are not planning to explore this opportunity.

Source: GLAMI survey of internet shoppers, 01/2024.

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2. Green Dreams: Gap Between Aspiration and Action

In 2023, we witnessed a surge in extreme weather conditions, prompting governments to discuss more regulations in this field. The level of consumer interest though still remains under scrutiny.

Over the years, participants in GLAMI surveys consistently expressed a significant interest in sustainability. In the latest GLAMI survey conducted in January 2024, only 10% indicated that they do not consider sustainability as a factor. At the same time, the largest share of people (35%) identified price as more important than sustainability.

Sustainability is a priority until people see the price

Do you find yourself more focused on sustainable and eco-friendly fashion choices now than before?

Yes, I'm prioritizing sustainable brands	26%
Yes, by trying to shop less	22%
Somewhat, but price is more important	35%
No, sustainability is not a factor for me	10% x
Other	7%

71% of individuals who assert that they shop less due to sustainability concerns later mentioned that they would purchase more items if they had greater financial resources.

People avoid fast fashion but mostly because of its low quality

What is your perception of "fast fashion"?

32% Avoiding it mainly because of its low quality

26% Okay with it as long as it's affordable.

22% Other/Not sure

10% I am conscious of eco problems, but I lack finance to shop more sustainably

10% Avoiding it due to environmental concerns

Source: GLAMI survey of internet shoppers, 01/2024.

When asked about the perception of fast fashion, the largest share of people (32%) asserted that they avoid it, primarily due to low quality. 26% of shoppers expressed acceptance of fast fashion as long as it remains affordable.

Additionally, sustainability was ranked as the least important aspect in the shopping experience – out of 15 factors. These findings suggest that the growing consumer interest in sustainability may, to some extent, be a form of wishful thinking.

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3. Tech Meets Trend: Fashion & AI

After generative AI's (Gen AI) breakout year in 2023, more use cases are emerging across the fashion industry. Gen AI is transforming the design process by generating unique clothing concepts based on trends and customer preferences as well as enhancing the retail experience by personalizing recommendations, virtual try-on experiences, and interactive styling suggestions, fostering deeper engagement with customers.

30% of consumers have already observed fashion e-shops utilizing AI. As is often the case with new technologies, opinions on AI are divided, with 31% of respondents expressing discomfort with its use in any aspect of the shopping experience.

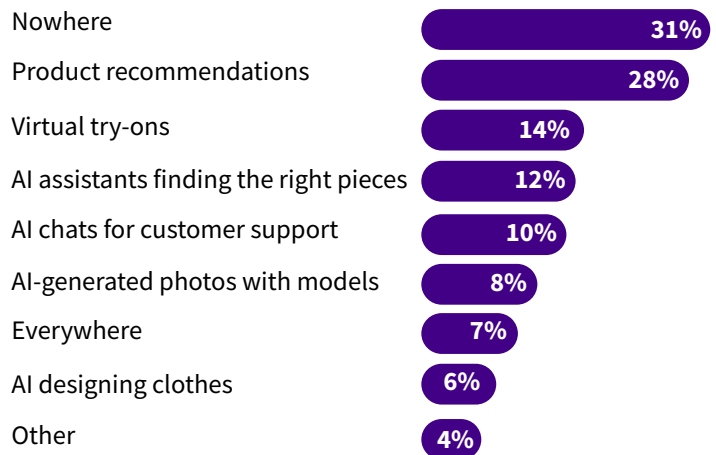**30% of consumers have already observed fashion e-shops utilizing AI**

59% of consumers used visual search to find a better price online for products they saw offline

The largest segment from lefts respondents (28%) indicates comfort with AI generating product recommendations.

Product recommendation is the most accepted area for using AI in fashion

In which areas of the fashion industry are you comfortable with using Artificial Intelligence (AI)?

Area	Percentage
Nowhere	31%
Product recommendations	28%
Virtual try-ons	14%
AI assistants finding the right pieces	12%
AI chats for customer support	10%
AI-generated photos with models	8%
Everywhere	7%
AI designing clothes	6%
Other	4%

Source: GLAMI survey of internet shoppers, 01/2024.

Following with a substantial difference, preferences include virtual try-ons for clothes (14%), AI assistants aiding in product searches based on user-provided descriptions (12%) and customer support powered by AI. The least enthusiasm is observed in 2 areas: AI generated pictures of models (8%) and AI designing clothes, garnering a mere 6%. Users seem more accepting of AI when it directly benefits them rather than the companies implementing it.

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The best of 2023

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Top Trends of 2023

Let's go to ballet

In 2023, ballet-inspired fashion took centre stage, with a nod to tulle skirts, cardigans, peplum tops, bando tops and, of course, ballet flats. The comeback of Mary Jane ballerinas has been a highlight, perfectly combining comfort and sophistication. In essence, it's a perfect blend of "glamour meets cosy."

+31% ballet flats
+42% cardigans

+70% loafers
+26% blazers

Quiet luxury

In 2023, the concept of "money screams, wealth whispers"is epitomized by the quiet luxury trend. This trend revolves around high-quality, minimalist pieces and promotes logo-free fashion, favoring muted neutral tones. Timeless trench coats and minimalist leather bags are just examples of it. Additionally, it complements the "working girl" trend: even if you don't have an office job, you might find yourself dressing like you do.

✳ Corpcore – name for "working girl" esthetics on TikTok

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5 Most Popular Products

Outdoor and puffer jackets

It's undeniable that puffer jackets are the most comfortable and warm outerwear.

Midi skirt

While denim and satin midi skirts trended in summer, knitted and wool skirts take the spotlight in winter.

Vintage adidas sneakers

Adidas Samba and Gazelle were undoubtedly the most popular sneakers of the year; on GLAMI, we observed significant increases of 100-250% in searches based on the country.

Uggs Ultra Mini

Uggs aren't going anywhere, especially in Romania and Italy; they're just getting shorter.

Wide jeans and pants

If mom jeans were bestsellers last year, wide jeans have become the top model this year, and it seems like they're here to stay in 2024.

Source: internal GLAMI data

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Top Brands of 2023

These are the top brands among GLAMI users, based on the number of likes and items added to wishlists during 2023. This data is an aggregate of GLAMI users from Italy, Greece, Czechia, Slovakia, Hungary, Romania, Bulgaria, Croatia, and Slovenia.

1. GUESS
2. NIKE
3. adidas
4. TOMMY HILFIGER
5. Calvin Klein
6. PUMA
7. bon prix
8. rieker
9. Tamaris
10. SKECHERS

In comparison with the 2022 list, the top of the list looks similar, but the lower half introduces three new brands: Rieker, Tamaris, and Skechers. Notably, Bonprix has jumped up two positions!

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Colors of 2023

Last year at GLAMI, we witnessed a significant increase in bright colors. This year, it seems like things have returned to normal, with elegant classic colors once again taking the lead.

Red

Elegant and energetic – red has taken over fashion in 2023. Although McQueen, Bottega Veneta, and Valentino showcased in their collections that red should be worn from head to toe, bold red also works well as a contrasting element in the form of bags, scarves, and shoes.

Grey

There is a good reason why grey has become one of the top colors of 2023. Its major benefits are versatility and the ability to complement other colors perfectly – for example, it really complements the red color.

Silver

The fashion scene is currently sparkling as much as it did in the Roaring 20s. Silver is definitely a winner here – it can even be considered a neutral, especially when paired with casual colors like grey. This trend prominently features in footwear and accessories, and, of course, silver jeans!

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What Was Gen-Z Wearing in 2023?

1 Gorpcore

Gorpcore draws inspiration from the outdoors, incorporating the practicality of hiking gear into everyday wardrobes, featuring **outdoor sneakers, fleece and technical jackets, cargo pants, funny packs, and bucket hats**. This trend is resonating with the general public, as we observe increases in these categories across all countries.

2 Blokette

This style features vintage sportswear styled in playful and feminine ways. It is based on Blokecore, which drew inspiration from lad culture, using **football jerseys and adidas Sambas**. Blokette adds a touch of femininity by pairing team apparel with **ribbons, skirts, and tight ties**. With the 2024 Olympics approaching in Paris, this trend might continue to develop further.

3 Bimbocore

Bimbocore encapsulates the hyper-feminine style, embodied in **pink velour tracksuits, fur coats. micro skirts, long nails, heels, and shiny handbags.** Think of Britney Spears, Paris Hilton, or Reese Witherspoon in 'Legally Blonde'.
This time it revolves around body positivity for women, serving as a liberation from stereotypes and societal judgment.
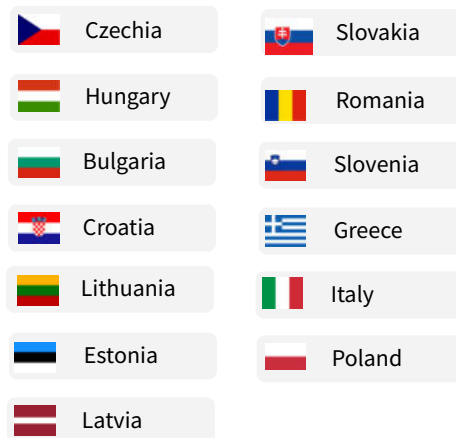
The generation born between 1997 and 2012

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About GLAMI

Where fashion meets technology

GLAMI is a leading European fashion discovery platform. Founded in 2013 and gradually spreading across 13 markets, GLAMI has grown into Central and Eastern Europe's most visited online fashion platform. On the basis of our state-of-the-art in-house AI technology, we are simplifying the way people discover and buy fashion.

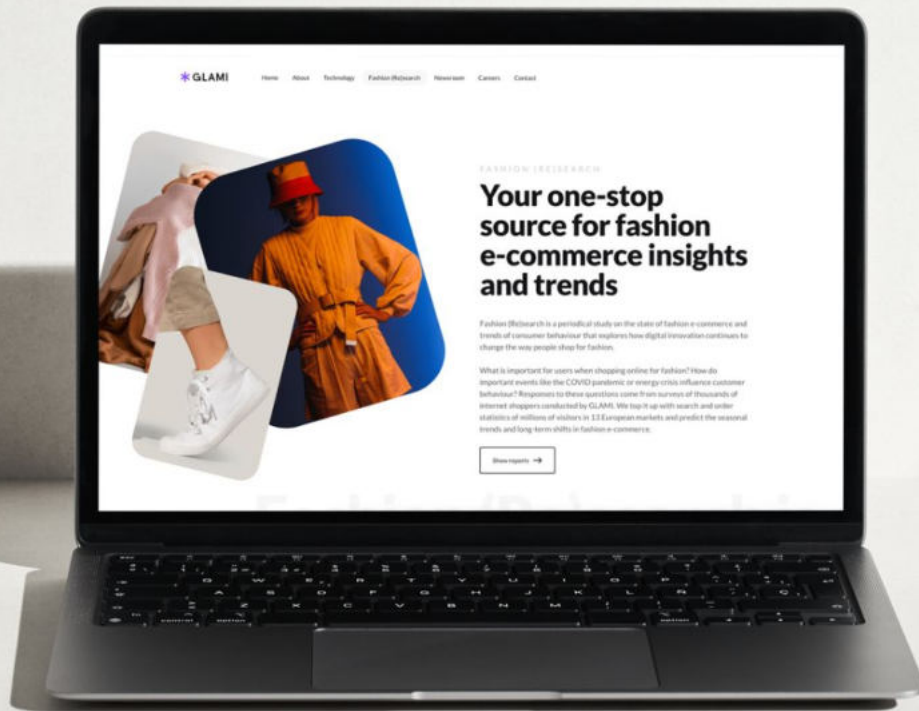Find out more on **GLAMI.group** website

Czechia	Slovakia
Hungary	Romania
Bulgaria	Slovenia
Croatia	Greece
Lithuania	Italy
Estonia	Poland
Latvia	

13
Countries

450K
Monthly orders mediated

15M+
Fashion products

4600+
Connected e-shops

47M+
Monthly visitors

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About report

The Year in Review report is part of the GLAMI Fashion (Re)search project, a regular study conducted by GLAMI.

The report combines both primary and secondary research methods, including the results of surveys among more than 30 000 internet shoppers (in Italy, Czech Republic, Slovakia, Greece, Romania, Hungary, Croatia, Slovenia and Bulgaria), internal data on categories and product performance, and data from external reports.

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Contacts

Are you interested in getting more data, comments or interviews from GLAMI? Sure thing!

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