

# 2022 Style Forecast



STITCH FIX



From the very beginning, Stitch Fix has brought together advanced data science and a human touch to transform the way people find the clothes that help them look and feel their best. Today, we serve millions of clients and analyze billions of data points on fit, style preference and more. This information comes from clients engaging with both our data-driven interface and our expert Stylists, which helps us cater to preferences for trending items, popular brands and emerging styles in real time. With the help of our Product and Data Science teams, we're able to make sense of all this data — and offer millions of people a truly personal shopping experience.

But that's not all our rich data gives us. Because we receive continual feedback on what people want to purchase, how often and why, we get an early glimpse into what's trending in real life — not just the fashion runways. For the first time, we've compiled our proprietary data and Stylist insights with consumer research into a report that offers a pulse on the latest styles and shopping preferences across the country. Information like this has become even more important over the last couple of years, as companies have relied on data to help them weather uncertain times. We hope this report can provide important and unique insights for the industry as we head into the new year.

Our inaugural Stitch Fix Style Forecast looks back at 2021 milestones — when work from home requests eased and when demand for jeans soared as the world began to open up — and shares expectations for 2022, including the future of workwear and the evolution of athleisure. After nearly two years in a global pandemic, comfort in clothes is here to stay, but our clients are excited to have new styles to wear to the office again — whether they go in once a month or five days a week — as well as for date nights, vacations and new sports they've taken up. With consumers eager to restock their wardrobes, there's significant opportunity at hand for brands and retailers, as long as they can cater to their customers' ever-evolving preferences.

We believe the best look is the one that helps you celebrate your unique perspective and makes you feel great — and our role is to be a trusted partner to guide people to explore their own sense of style. We look forward to bringing this experience to even more clients this year through our curated Fixes and our new online personalized shopping destination, Freestyle. To all of the clients, Stylists and brand partners that are on this personal shopping journey with us, thank you. We can't wait to see what's ahead.

### **Elizabeth Spaulding**

Stitch Fix CEO

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#### **Methodology**

Our inaugural Stitch Fix Style Forecast leverages data collected from our 4.2 million clients and thousands of expert Stylists as well as our Merchandising team, who review performance and feedback dashboards every day. Some of these metrics include: sales data; "Like/Love" score, a measure of client feedback on particular items; "Success Rate," how often an item is kept in a Fix (our curated selection of items delivered to clients); client profile data points; and Fix Request Notes, the note clients leave for their Stylist to indicate what they'd like to receive in their next Fix. Unless otherwise stated, all Stitch Fix sales and "Fix" request statistics refer to calendar year 2021 to date, as of November 30, 2021. Comparisons to the prior year refer to calendar year 2020 from January 1, 2020 to November 30, 2020. We also cite a survey of 1,000 nationally representative consumers age 18+ conducted by Wakefield Research for Stitch Fix, market research from Coresight and industry trend sources like WGSN and Trendalytics. All data comes from internal Stitch Fix resources unless otherwise noted. All sales data included refers to Stitch Fix sales, unless otherwise noted.





# Findings in Brief

## Retail's Recovery & Evolution:

US apparel and footwear spending exceeded pre-pandemic levels every month of 2021 and is expected to grow 30% year over year. And the pandemic greatly accelerated the shift toward online shopping. E-commerce grew to account for 36% of total apparel and footwear sales in 2020, versus 26% in 2019 — and is expected to remain about 32% even as the world reopens.<sup>1</sup>

## The COVID Closet Clearout:

The new normal has people eager to revamp their wardrobes, with two-thirds (67%) of consumers likely to swap out clothes. On average, they're looking to replace about one-third of their wardrobe, with 33% planning to replace at least half.<sup>2</sup>

## From Business Casual to Business Comfort:

People got a taste for comfort during lockdowns, and they aren't about to give it up — almost one-third (31%) would rather take a 10% pay cut than dress up for work every day<sup>2</sup> — but they still want to balance it with style. Workwear like stretchy blazers, knoven (knit + woven) tops and elastic-waist bottoms are proving you can have both.

## Everyday Denim & Dresses Make a Comeback:

So long, sweatpants — the 30% year-over-year increase Stitch Fix saw in denim sales<sup>3</sup> suggests denim is back in a big way. Today, clients are turning toward straight leg, wide leg and relaxed styles over skinny jeans. In addition, Stitch Fix has grown dresses inventory 40% compared to a year ago to match demand, with top styles including maxi dresses (+60% sales year over year), natural fabrics and bright colors and prints.

## Inclusive Sizing Delivers Results:

Size inclusivity is core to Stitch Fix, and it's met by demand, with Women's Plus sales growing 50% and Men's Extended Sizing growing about 30% year over year. Stitch Fix now has over 100 brands with Plus sizing, including Universal Standard, 11 Honoré, Vince and Champion.

## Going Out Is Back in Style:

The 50%+ year-over-year increase we saw in going out/special occasion sales suggests our clients are enthusiastically venturing back out into the world. Top women's styles include dresses, jumpsuits, skirts, booties and high heels. Meanwhile, men are embracing dressed-up denim, bomber jackets and shirt jackets.

## Bold Colors, Fun Patterns:

More than one-third (36%) of consumers are looking forward to wearing bright, saturated colors<sup>2</sup> — and our data is telling us that the Color of the Year for 2022 will be Vibrant Magenta. Women are also gravitating toward mint, mustard and purple, while men prefer dusty lavender, dark green and coral. And a quarter (25%) of consumers plan to rock patterns,<sup>2</sup> with color block being our top trend and checks, camo, graphics and allover prints also ranking highly.

## Versatile Athleisure, Performance-Focused Activewear:

Active and athleisure remain our fastest-growing categories across Men's and Women's, with everyday lifestyle pieces like woven bottoms and fleeces trending upward. Performance-driven active sales are also growing (Women's 300%+ and Men's 100%+ compared to 2020), thanks in part to sports and activity apparel like hiking/golf shorts, tennis skorts and sneakers.

## Trends for the Quickly-Growing Kids Category:

Our Kids' clients may be young, but they know what they want — more clothes for going out, whether for special occasions or hanging with friends. Girls are opting for skirts and sweaters, while boys' sales are being driven largely by activewear and athleisure. Coordinated outfits and matching sets are popular, while requests for tie dye are down after peaking in July.

## The Continued Rise of Values-Based Shopping:

Stitch Fix has made sustainability and equity a priority, setting the goal to source 100% of materials in our private label brands more sustainably, and introducing Elevate to provide financial support and mentorship to fashion entrepreneurs of color. Values are increasingly important to clients — in the last year, requests for sustainable and organic materials increased 22%.

## Relationship-Driven Shopping Takes Hold:

Whether turning to social media, a friend or a fashion expert, relationship-based shopping is taking off — 92% of consumers say they trust others' opinions on what looks good on them, with 58% wishing they had a personal stylist.<sup>2</sup> Meanwhile, client requests mentioning TikTok have jumped 75% year over year, with some of the hottest looks including Y2K, Cottagecore and Dark Academia.

## Offering a Better Experience:

Consumers are eager to revamp their wardrobes, but they still have major frustrations with the typical online shopping experience, like not knowing the fit before buying (39%)<sup>2</sup> or spending endless hours searching and scrolling — over 25% of Americans spend five or more hours browsing websites before making a purchase.<sup>4</sup> Providing an engaging, personalized experience will be the key to success for retailers.





# 2021: A Look Back

## Retail's Recovery & Evolution

US consumer spending on apparel and footwear exceeded pre-pandemic levels every month of 2021. Coresight Research estimates that apparel and footwear consumer spending will total \$465 billion in 2021, representing a year-over-year growth of 30%. Headed into the holidays, apparel is set to make the largest year-over-year spending increase of any category.

There are clear signals that the pandemic will have lasting effects on the shopping experience, including an unprecedented shift to online channels. According to Coresight Research, e-commerce grew to account for a peak 36% of total apparel and footwear sales in 2020, versus 26% in 2019. Even with much of the world reopening, the penetration rate of apparel and footwear e-commerce is expected to be around 32% in 2021.<sup>5</sup>

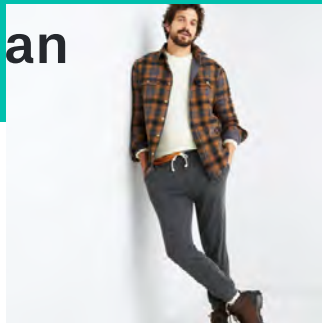
## The Year in Fashion Requests

Each month, our Stylists receive hundreds of thousands of Fix Request Notes detailing what clients want in their next Fix, which provide us with early insight into big-picture patterns shaping the fashion world. Here were some of our most notable (and fun!) findings from 2021:



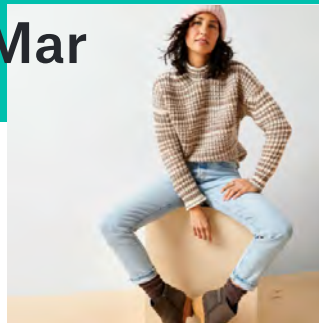
Jan

**Women's headband requests jump 600% from January 2020** after Amanda Gorman debuts a stunning statement headband at the inauguration



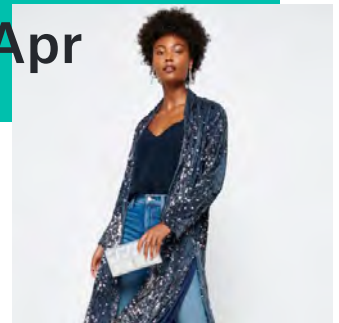
Jan

As US COVID-19 cases reach their peak, so do **client requests for sweatpants, jumping 214%** from January 2020



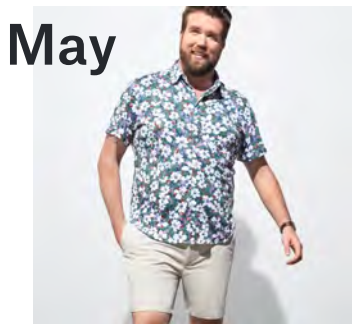
Mar

**Requests for skinny jeans decline 12%** since February after Gen Z roasts them on TikTok. Meanwhile, **wide leg requests increase 54%** in the same time frame



Apr

**Client requests referencing IRL outfit needs surge**, with strong year-over-year increases for terms like party (134%), dinner (120%), brunch (55%) and date (37%)



May

**Mention of vacations grow 138% year over year**, with hot destinations including Napa (+774%), Disney (+317%), Miami (+278%) and Cabo (+159%)



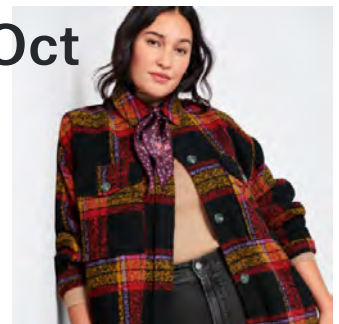
July

**Lowest volume of "work from home" requests** since March 2020, down 76% since their peak in January 2021. For the first time since 2020, "Zoom" stops trending in client requests



Sep

**Requests mentioning fashion icon Harry Styles shoot up 160%** from 2020 after "Love on Tour" kicks off



Oct

**Shackets — a hybrid between shirts and jackets — become the top trending item** in women's Fix Request Notes, increasing 190% from September





A woman with long, wavy blonde hair is standing in a doorway. She is wearing a dark green, textured sweater and matching green trousers with a gold-colored belt buckle. Her arms are raised, and she is looking directly at the camera. The doorway is set into a light-colored stone wall. Above the door is a semi-circular window with a decorative leaded glass design. The door itself is dark blue or black and has the words "THE C" visible in gold lettering. The overall aesthetic is modern and sophisticated.

**2022:**

**A Look**

**Ahead**

## The COVID Closet Clearout

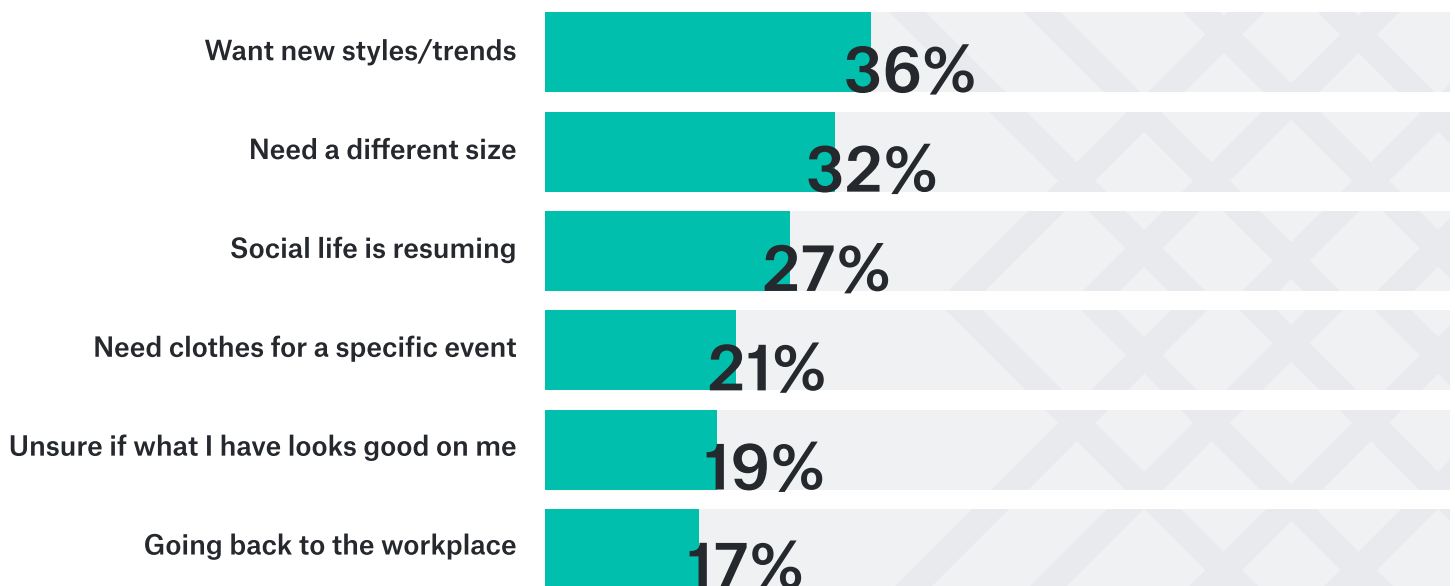
Nearly every facet of our lives was touched by the pandemic, and our wardrobes were certainly no exception. In a survey of Stitch Fix clients, 58% of women and 53% of men said their look changed during the pandemic, and they expected those changes to continue in the near term.<sup>6</sup>

Maybe that's why two-thirds (67%) of consumers said they were likely to replace clothes in their wardrobe, with men (67%) and women (66%) nearly equally interested in updating their apparel.<sup>2</sup>



**79%**  
of Millennials say they  
are likely to refresh  
their wardrobe<sup>2</sup>

### TOP REASONS FOR WARDROBE OVERHAULS<sup>2</sup>



And this won't involve just swapping out a few pieces here and there. On average, **consumers are looking to replace one-third of their wardrobe**, with 33% planning to replace at least half.<sup>2</sup> But what exactly are they planning to buy?



## Workwear: From Business Casual to Business Comfort

With more people going from remote work to in-person work — at least part-time — demand for workwear is quickly gaining speed. This October, requests for “back to office” and “back to work” were up 39% from the same period in 2020.

But it’s already clear that workwear preferences have changed: **71% of consumers said striking a balance between style and comfort is more important to them now than before COVID-19.**<sup>2</sup>

“**Headed back to a (casual) office for the first time in almost a year & want to refresh my wardrobe with pieces that are good for work... I’ve been living in sweats for the last 9 months and need to go back to work in comfort.**”

- Greg, 50, Stitch Fix client in Michigan



Many are even willing to sacrifice pay for comfort.

**Nearly a third (31%) of consumers report they would rather take a 10% pay cut than have to get dressed up for work every day<sup>2</sup>**

In fact, a full 77% said they had sworn off at least some business clothes for good

### OFFICE APPAREL PEOPLE ARE DYING TO DITCH<sup>2</sup>

**All generations agree — business suits are out.** Boomers lead the pack, with 51% saying they’ll never wear a business suit again, followed by Millennials (45%), Gen Z (38%) and Gen X (36%).<sup>2</sup>



**45%**

business suits



**31%**

button-down shirts



**31%**

dress pants



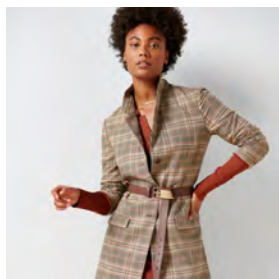


# Workwear: From Business Casual to Business Comfort

The vast majority of consumers (91%) agree that professional clothes don't have to be uncomfortable to look good.<sup>2</sup> And stretchy fabrics, elastic waistbands and knoven (knit woven) materials are proving them right, giving way to a new category: **Business Comfort**. This new trend combines the comfort of your favorite loungewear with the polish of traditional workwear.

## TRENDING BUSINESS COMFORT STYLES

Women's



Soft, oversized/  
boyfriend-fit blazers



Sweater dresses



Elastic-waist bottoms

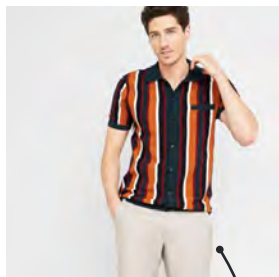


Sweater tanks



Fly knit flats

Men's



Polos



Stretchy long-sleeved  
knoven tops



Commuter pants  
(4-way stretch/  
performance properties)



Hybrid Chukkas & Oxfords



Knit blazers

### Polos Are the New Button-Downs

Expect to see fewer Oxford shirts at the office next year — while they're still a staple, polos are starting to encroach on their turf.

**Polos have received the most 'like' or 'love' ratings from clients than any other top.**

Polos in performance fabrics are a particular favorite, representing about half of polo sales this year, up from about a quarter of polo sales last year.

In 2022, we expect polos to make up 40% of Stitch Fix's short-sleeved knits inventory

Business Comfort combines comfort and tailoring with more stretch and versatility than the more buttoned-up style of pre-2020 workwear. Relaxed trousers are perfect for that busy client who is on-the-go but wants to stay stylish. For men and women, blazers still continue to be a highly sought-after layering piece, but now in soft knit fabrics that feel more like a sweatshirt and allow for more freedom and movement. Gone are the days of tailored suits — instead, men and women are looking for ways to mix athleisure with business casual wear."

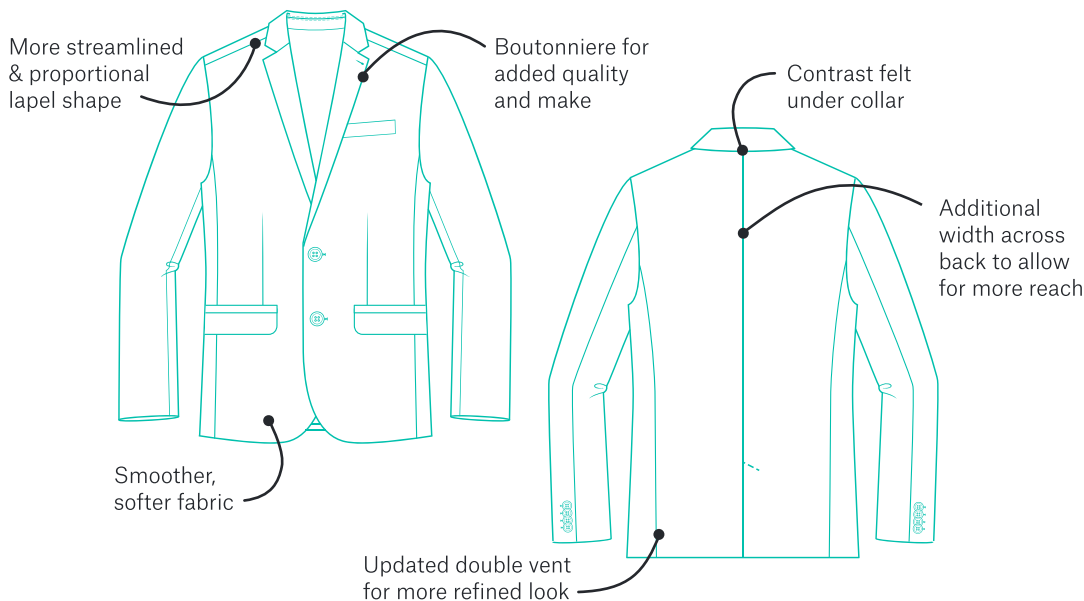
— Stylist Nicole S.



## The Blazer of the Future

Leveraging the data we had on fit, size and style preferences, Stitch Fix launched a revolutionary blazer in partnership with NFL stars Kyle Pitts, Fred Warner and Marquise Goodwin (pictured to the right). Available in a range of sizes and silhouette combos, including Short, Regular and Tall fits across sizes XS-3XL, it was designed to fit all kinds of bodies — not just the “standard” build.

### REIMAGINED: FAIRLANE REFINED STRETCH TWILL BLAZER



### Business Comfort: an International Trend

The demand for comfier workwear isn't just limited to the States — 72% of UK consumers declared “comfort” their top priority for their WFH wardrobe.<sup>7</sup> Taking this into account, we partnered with emerging British designer, Phoebe English, to imagine what the future of workwear might look like.

**The signature piece: a blue wrap coat paired with a hooded shacket and elastic-waist trousers.**



# 72%

of UK consumers declared “comfort” their top priority for their WFH wardrobe





## Everyday: Denim & Dresses Make a Comeback

The definition of “everyday outfit” has substantially changed since the onset of COVID-19. Throughout lockdowns, 36% of consumers reported wearing loungewear/sweats on a daily basis, while 29% copped to wearing slippers and 27% to pajamas — 43% even admitted to wearing “quarantine clothes” like these outside of their home.<sup>2</sup>

### JEAN FITS: IN VS. OUT



# 35%

of consumers say they'll **never wear skinny jeans again**, with West Coasters even more adamant (44%)<sup>2</sup>

But men and women alike seem to be picking up pre-pandemic staples with renewed enthusiasm.

**Stitch Fix denim sales were up 30% this year over 2020**

And those TikTok-ers weren't kidding — skinny jeans really may be on the outs, with the **fit growing slower than any other denim silhouette**.

Meanwhile, other fits are seeing rapid growth. Women's **straight leg sales increased 30%** year over year on Stitch Fix, making up about 20% of our total women's denim sales. Our women's **wide leg sales grew even more dramatically, increasing 70% year over year**. Men's denim, on the other hand, saw year-over-year sales increases from August to October in relaxed fits (+23%) and straight legs (+21%) on Stitch Fix.



Women are complementing these wider legs with lug/chunkier outsoles, which have seen 250% year-over-year sales growth on Stitch Fix.



Everyday dresses are also on the up and up. Our Merchandising team increased our assortment of dresses by 40% from 2020 to 2021 to accommodate this demand. **Heading into 2022, we're forecasting an additional 30% growth in the category.**

## DRESS TRENDS

### 1 Maxi dresses

### 2 Natural fabrics (Linen, poplin, gauze, etc.)

### 3 Bright, optimistic colors and prints



Our maxi dress  
sales grew year  
over year by

# 60%

6 of the top 10  
dress styles in  
2021 on Stitch Fix  
were florals

As dresses return to clients' wardrobes, tall boots are too, with our sales growing 150% since 2020. Other popular styles range from chunky lug sole booties to above-the-knee boots.





## Inclusive Sizing Delivers Results

While **most clothes available online are size eight or below, the average American woman wears a size 16** — highlighting a significant gap in the sizes retailers offer and the sizes consumers need. Economic hardship during the early days of the pandemic only widened this gap, with store closures and brands reducing their investment in plus-size offerings. Retailers who dismiss inclusive sizing are missing out on an opportunity to engage an underserved group of consumers who are eager to shop.

**50%** growth in Stitch Fix's Women's Plus sales from 2020 to 2021



The Label released five classic loungewear styles in sizes XS-3X

From 2020 to 2021, Stitch Fix's Women's Plus sales grew 50%. We now carry over 100 brands with Women's Plus sizing, including Universal Standard, 11 Honoré, Vince, Champion and Levi's — and to date, we've helped over 30 brands launch Plus, including Rebecca Minkoff, Karl Lagerfeld Paris and Mavi. Men's extended sizing, meanwhile, grew about 30% year over year, comprising 50 different brands.

Among the brands that we **helped launch a Plus line in 2021 was The Label, a Black-owned, female-founded minimalist athleisure brand**. Leveraging the data that Stitch Fix makes available to all of our brand partners — including fit, size, fabrication, color, feedback and more — The Label released five classic loungewear styles in sizes XS-3X.

In addition, all of our private label brands carry inclusive sizing (00-24W and XS - 3X in Women's, XS - 3XL in Men's), and Stylists are trained to outfit all body types.



## Going Out & Special Occasions: Going Out Is Back in Style

While people may be resisting office dress codes of years past, they're still ready to dress up — as long as it's on their own terms. More than half (55%) of consumers said they were excited to get dressed up to go out, with **44% actively planning to replace their going-out clothes.**<sup>2</sup>

And with social lives, events and vacations ramping back up, clients are clamoring for accompanying apparel. We've seen **sales for going out/special occasions up more than 50% from 2020 to 2021.**

Dresses aren't just trending in the everyday category — they're a favorite for going out/special occasions as well, with sales of dresses in our "social event and night out" category growing more than 100% year over year.



**61%**  
of Gen Z say they  
plan to replace their  
going-out clothes<sup>2</sup>

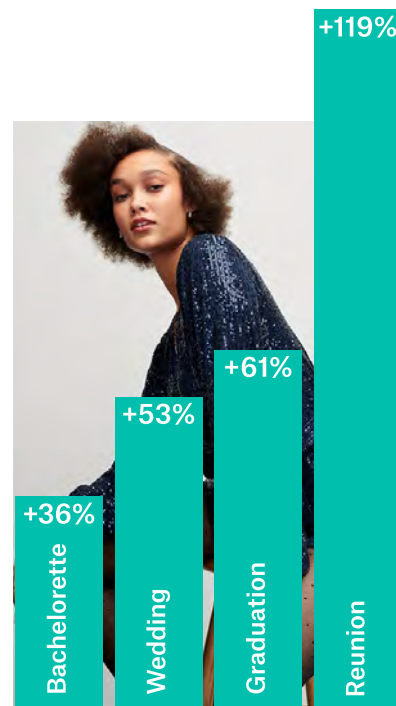
### REOPENING REQUESTS



Going Out Requests



Travel/Vacation Requests



Other Occasion Requests

### STYLISTS SHARE MOST FREQUENTLY ASKED-FOR GOING OUT + SPECIAL OCCASION ITEMS<sup>8</sup>



**83%**  
midi dresses



**50%**  
dressy blouses



**48%**  
wide-leg trousers



**46%**  
skirts



**45%**  
dressy coats

Across these items, Stylists say clients like form-fitted styles (53%) and shiny/sparkly fabrics (56%).<sup>8</sup>





Our skirt  
sales grew year  
over year by **60%**

especially in faux leather/suede materials



// “There is more **#covidrevenge** dressing from our female clients, who are ready to hang up their leggings and break out the sequins. We are seeing holiday party requests and openness from clients who may not have worn dresses or skirts as much before to give something new a try... Our female clients are open to trying a skirt with print, sequins or maybe even a leather option for dressing up, proof of feeling adventurous and almost rebellious after the quiet or often non-existent celebrations of 2020.”

— Stylist Lynsey D.

And women are pairing these bold looks with booties and high heels (especially strappy and block heel varieties), both of which have seen sales increase by about 70% year over year on Stitch Fix.

↑ **70%+**  
sales y/y



For men, denim is another category that's surging for both everyday and going out/special occasions.

**Men's dressy denim sales have increased nearly 20%**  
year over year on Stitch Fix.

The same is happening with our **Men's outerwear, which has seen a nearly 30% year-over-year increase in sales.** Bomber jackets are a favorite, with men more likely to keep bombers sent out in Fixes than any other type of jacket. **Shirt jackets are another popular choice, growing over 10%** on Stitch Fix in sales this year from last and accounting for 42% of our Men's outerwear sales between August and October of 2021.



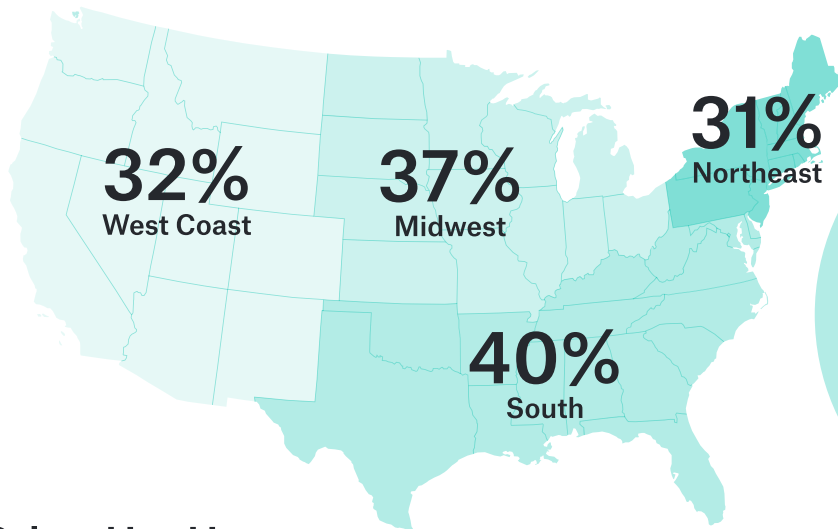
**30%**  
year-over-year  
increase in our Men's  
outerwear sales



## Bold Colors, Fun Patterns

More than one-third (36%) of consumers say they're excited for bright, saturated colors in 2022.<sup>2</sup> Particularly interested were Southerners (40%) and Midwesterners (37%), with less enthusiasm among those in the Northeast (31%) and West Coast (32%).

### EXCITED FOR BRIGHT, SATURATED COLORS IN 2022



Stitch Fix makes an annual data-driven Color of The Year prediction, and for 2022 we've named **Vibrant Magenta** (dark hot pink) as the shade we expect to show up in everything from men's ties to blouses.



### Other Hot Hues

## Women's

Mint  
Purple  
Mustard



## Men's

Dusty Lavender  
Dark Green  
Coral

Patterns are poised to take off as well, with 25% of consumers saying they plan to wear them more often or for the first time.<sup>2</sup> Some top styles:



Checks



Camo



Graphics



# Athleisure & Active: Versatile & Performance Styles Reign Supreme

Nearly two years into the pandemic, athleisure and activewear are still seeing impressive growth. When it comes to athleisure, our fastest-growing category, versatility is the name of the game. Clients favor pieces at the intersection of comfort, style and active technical support. Fitting these pieces into their daily lives is key, whether that's lounging at home, taking kids to the park or catching a flight.

## TRENDING ATHLEISURE ITEMS

Women's



Stretch woven bottoms



Jumpsuits



Fleece

Polar fleeces in 90s-style color blocks are poised to be a super trend in 2022

Men's



Joggers/sweatpants



Fleece



Retro sneakers

Men's sneakers in particular are having a moment, with our **sales growing nearly 80% year over year**. Bright white and colorful sneakers are hot right now, with top-performing brands including Adidas, New Balance, Vans and Nike.

## TRENDING ACTIVEWEAR ITEMS

Women's



Skirts & skorts



Logowear



Bike shorts

Performance-driven activewear is flourishing as well, with our **Women's sales growing over 300% year over year** and our **Men's growing 100%**. Perhaps as a result of people spending more time outdoors during the pandemic, apparel associated with sports and activities like tennis, golf and hiking are trending.

Men's



Hiking shorts



Golf shorts



Performance polos

## SPORTY REQUESTS

"Golf shorts" **+23% y/y**

"Hiking shorts" **+29% y/y**

"Skorts" **+34% y/y**

"Bike shorts" **+99% y/y**





## Kids: Clear Trends for a Quickly-Growing Category

Launched in 2018, Stitch Fix Kids is a fast growing part of our business. While these clients may be young, they still have strong opinions on style (which we hear from their parents!). And just like we're seeing with adults, clothes for going out — whether that's for a special occasion or just hanging with friends — are on the rise.

### THE GREAT OUTDOORS



While still in its early stages, **signs point to healthy growth for outdoor wear** like flannels, sherpa and polar fleece layering, puffers and shackets.

### COORDINATION IS KEY



Almost 80% of Kids Fix Request Notes ask for a coordinated look, with **20% requesting a head-to-toe matched outfit** and another 60% requesting pieces that look good together.

### TRENDS FOR GIRLS

#### We've Reached Peak Tie Dye



Tie dye has been a staple over the past couple years, becoming an emblem of pandemic fashion. Client requests for this pattern were still up more than 25% over 2020, but **peaked in July**. Heading into fall, however, **requests declined 30%**, suggesting 2022 will likely bring new dye and wash effects.

#### Skirts & Sweaters Are Gaining Traction

As kids gravitate toward dressier looks, girls are opting for items like skirts and sweaters. We **grew our skirts inventory 46%** year over year with tiered, A-line and pleated varsity-inspired skirts leading the pack. Girls also want more sweaters — this **cozy category grew 55%** on Stitch Fix compared to 2020.



### TRENDS FOR BOYS



This healthy category, bridging the **divide between playwear/cozy and true active**, represents **roughly a third** of our overall Boys' business. We expect this momentum to continue into 2022.

#### Active/Athleisure Is on the Rise



#### Brands Are Big

Key national brands like Nike, Adidas, Under Armour, Vans, The North Face and Hurley outperform others among tween boy clients.





# The Future of Shopping



## What Shoppers Want From Their Experience

While people are eager to buy new clothes, the shopping experience still leaves a lot to be desired.

### TOP SHOPPING STRUGGLES<sup>2</sup>

Not knowing the fit before buying

39%

Not having my size available

38%

Items I like online are not in stock

36%

72%

Finding the right fit is a particularly pervasive challenge for consumers:

**of consumers said they have trouble finding clothes that fit, leading 51% to order extra sizes and styles in hopes of finding something that works<sup>2</sup>**



32% of  
consumers  
say they need  
a new size

In the last year, this has become even more important. Perhaps as a result of pandemic-related weight fluctuations, 32% of consumers say they need a new size, even more so among women (37%) than men (27%).<sup>2</sup> But better sizing options aren't the only concern for consumers.

## The Continued Rise of Values-Based Shopping

In an increasingly socially-conscious society, consumers aren't just shopping based on their budget — according to the World Economic Forum, 68% of US consumers say their social values shape their shopping choices.<sup>9</sup> In the last year, for example, we saw a **22% increase in mentions of terms related to sustainability and organic materials** in Fix Request Notes.







Stitch Fix is committed to prioritizing principles like sustainability and equity, not just to cater to consumer demand, but because we believe it's the right thing to do.

This year, for example, we became members of the Sustainable Apparel Coalition (SAC), a group of 250+ organizations working to create a more planet-friendly global value chain. We also plan to source 100% of the main materials in our private label products more sustainably than conventional alternatives by 2025 — in 2021, we achieved 47%.

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**This November, we launched Mohnton Made, a Stitch Fix-exclusive line of more sustainable everyday basics for men and women (with inclusive sizing to boot) featuring recycled materials, entirely knit, cut and sewn in the USA.**

We're also making progress toward our goal of promoting a more diverse retail landscape. Black business owners face serious institutional challenges — 56% of Black business owners say limited access to capital has held their business back, and 82% say they have to work harder to achieve the same level of success as their counterparts.<sup>10</sup> We're committed to doing what we can to eliminate those barriers to entry and support the next wave of fashion entrepreneurs of color.

Our Elevate program, which offers financial grants and mentorship to entrepreneurs of color in the fashion industry, launched its first collection this year, featuring clothing from six Black-owned brands emerging from the program. In addition, about **8% of the brands that we onboarded to our Stitch Fix vendor base in 2021 were Black-owned. In the next year, we're aiming to double that figure.**



## Relationship-Driven Shopping Takes Hold

We're also seeing signs of a greater shift toward relationship-based shopping. **Almost all consumers (92%) say they trust others for an opinion on what looks good on them,**<sup>2</sup> which may help explain the growing sway of platforms like TikTok — where people turn to their peers and influencers to understand what's in and what's not.

# 92%

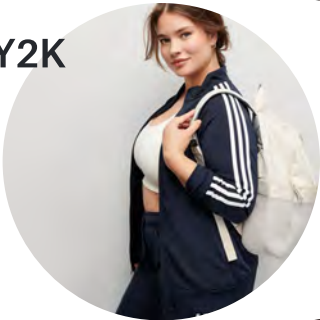
of consumers admit they **trust others** for an opinion on what looks good on them

**A few looks popular on TikTok that crossed over to Stitch Fix:**

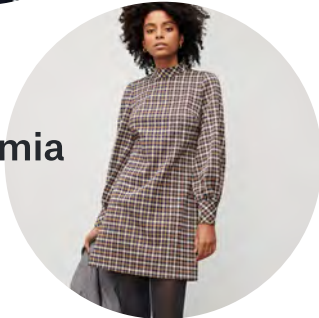
**Cottagecore**



**Y2K**



**Dark Academia**



With screen time surging during lockdowns, it's no surprise that TikTok's influence on fashion did as well — mentions of TikTok in Fix Request Notes grew more than 75% since 2020. **Here's a small sample of what we heard from clients:**

**"I've seen a couple of curvy women posting adorable outfits on TikTok. I never was a risk taker, but would love to try some of the high-waisted looks with the shorter shirt!"**

— Nicole, 39, Stitch Fix client in Maine

**"I'm using this [Fix] to film a TikTok and have my followers vote on what to keep! Definitely open to trying new, fun things."**

— Stephanie, 20, Stitch Fix client in Indiana

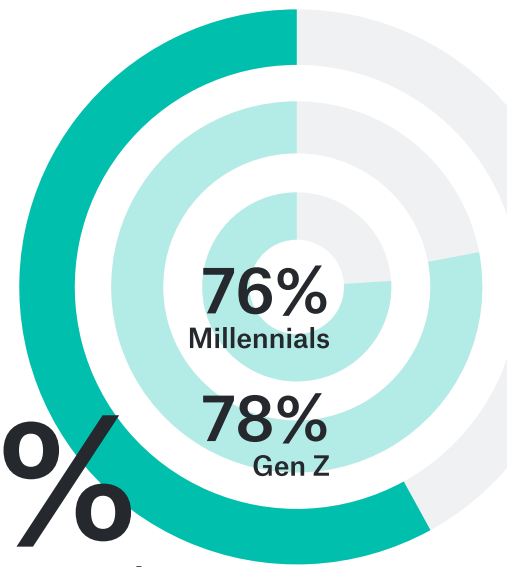
**"Kids on TikTok said skinny jeans were out and I'm supposed to be wearing straight leg jeans. No idea what tops I'm supposed to wear. Please make me a cool mom."**

— Alison, 34, Stitch Fix client in Arizona



But consumers don't just look to their social circles and online idols for clothing recommendations. They also trust the pros — **58% say they wish they had a stylist available to help them consistently put together fashionable outfits**, with Gen Z (78%) and Millennials (76%) particularly keen on the idea.<sup>2</sup>

Stitch Fix clients frequently interact with our service and expert Stylists, with the majority of Fixes including request notes, **80% of items shipped receiving detailed feedback and one million clients a month playing Style Shuffle**, our gamified rating experience. This information helps us personalize our offerings, deliver a better experience and ultimately, build relationships with clients — not just facilitate transactions for them.



**58%**  
of consumers say they wish they had a stylist available to help them consistently put together fashionable outfits



## Offering a Better Experience

The challenge for retailers will be delivering an experience that takes the things that matter most to consumers into account — whether that's finding the right fit, aligning purchases with their values, social media trends or expert guidance — without overwhelming them. The current system of endlessly scrolling through online product pages isn't cutting it — **74% of Americans feel overwhelmed, impatient or stressed by online shopping**. Over 25% even spend five or more hours scrolling through websites before making a purchase.<sup>5</sup>

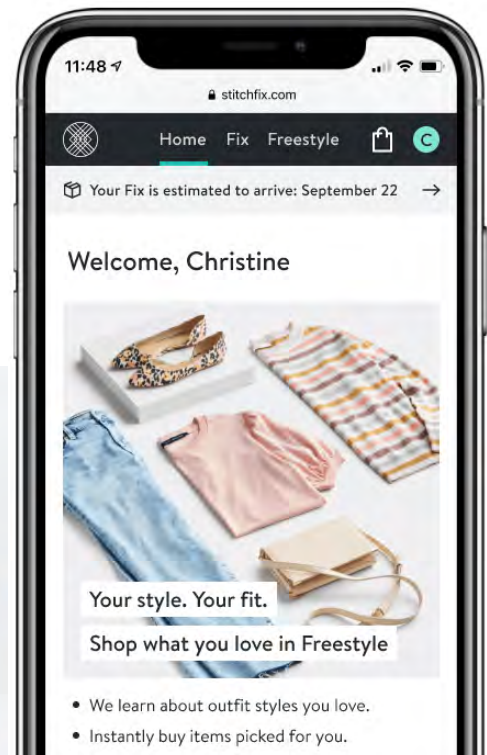
With statistics like these, it's easy to see why the **vast majority (81%) of consumers say they would like a better way to find clothes that fit them and their lifestyle**.<sup>2</sup>

**81%** of consumers say they would like a better way to find clothes that fit them and their lifestyle





**At Stitch Fix, we believe the solution is a more personalized experience.** And we're constantly improving upon it, both with our Stylist-curated Fix service and Freestyle — our new personalized shopping experience where anyone can discover and instantly buy recommended items based on their personal style, fit and size. Freestyle helps us serve clients in a new and meaningful way, which we believe will become an increasingly important complement to our Fix services.



## Embracing the Consumer's Voice

Amidst the new normal, consumers have a significant opportunity at hand. After getting the chance to reassess priorities and dress however they liked during lockdowns, they can re-enter the world — whether that means heading into the office a couple of times a week or finally taking that long-postponed vacation — empowered to authentically express themselves through what they wear, rather than dressing as they think they should. From the items they love to the experience they want to the values they support, consumers are making their preferences heard — it's up to the fashion industry to listen.

Savvy retailers will accommodate consumers' desire for comfort across categories, appetite for the latest everyday trends, renewed enthusiasm for going out and need for both versatile and high-performance activewear. **And those that can deliver it all through a personalized, customer-first experience will be poised to thrive.**

Sources: 1. Coresight Research for Stitch Fix (December 2021); 2. Survey of 1,000 nationally representative US adults by Wakefield Research for Stitch Fix; 3. Unless otherwise stated, all Stitch Fix sales and "Fix" request statistics refer to calendar year 2021 to date, as of November 30, 2021. Comparisons to the prior year refer to calendar year 2020 from January 1, 2020 to November 30, 2020; 4. Survey of 2,000 nationally representative US adults who shop online by OnePoll for Stitch Fix; 5. Coresight Research for Stitch Fix (December 2021); 6. Survey of 1,078 Stitch Fix clients (June 2021); 7. Survey of 1,500 UK adults conducted by Censuswide for Stitch Fix (February 2021); 8. Survey of 1,102 US Stitch Fix Stylists (November 2021); 9. World Economic Forum, *Consumer demand for Black brands is rising* (2021); 10. Bank of America, *2021 Black Business Owner Spotlight* (2021)

