

Brexit and the High Street

September 2018

4 YOUTH

The Brexit landscape: Tribes feel bemused, angry and resentful

The issue of "Brexit" has left the majority of Tribes with negative feelings about the UK's decision to leave the EU as they question what it means for the economy and their futures. Young adults are disillusioned with the political system and dismayed by the handling of the Brexit deal as media sources and politicians have failed to reassure them on the next steps. A minority have chosen to avoid following news on Brexit altogether until negotiations have been finalised.



"I feel very negative about Brexit - whether i happens or not a lot of damage to our econor has been done already." **– Female, 16**

The Brexit Effect: An uncertain future for everyone

Tribes don't feel that Brexit has affected their disposable income yet but anticipate that it will have an impact in 2019 when combined with the overall uncertainty of the future. Their main concern is how Brexit will impact their education, job prospects and opportunities to travel or work abroad. The consequences of a hard Brexit mean that higher education institutions will face financial pressures that will ripple down affecting the funding of courses and resources, as well as missing out on vital cultural connections. They believe that it will be harder to find work. It will also affect the way they travel and have already noticed a difference in the crippling exchange rates. Some who have family that work abroad in the EU or are students living on a tight budget have noticed small signs of trouble in the workplace or increasing prices at supermarkets and retail stores.

Tribes anticipate that Brexit will also have an impact on the UK's social welfare system and health services where public service sectors like the NHS will struggle to stay afloat. They are concerned about a growing skills gap, limited funding for research and resources that are heavily reliant on EU staff.

"Not yet no. It will be harder to travel in Europe I think and potentially some big companies will leave the UK so finding work may be harder too." – ***Female, 20, Urban, VOD:Socials***

"Uncertainty as to own job prospects i.e. studying for a degree in a foreign language - how useful/easy will this be to us once free movement is stopped and attitudes towards Brits changes?" – ***Female, 21***





Young adults may be the saviours of high street shopping

Over the past few years, the retail sector has struggled to maintain footfall on the high street as well as the planned closure of 1000s of stores across the UK for companies trying to save ahead of Brexit. Tribes believe that shopping on the high street can be an expensive ordeal and anticipate an increase in costs due to inflation. This does not necessarily affect their overall relationship with the high street where opinions were divided.

Although 16-24 year-olds are a mobile-first generation with access to online information, entertainment and services, they still value face-to-face connection. Our Tribes suggest that the high street is a great place for young adults to spend time with family and friends as they often have the time and inclination to physically go shopping. It's just a matter of keeping them interested!

"I am unsure as I usually shop online but I believe I will be less inclined due to price increases" ***– Male, 24, Leading edge, VOD:Bingers***

"No, I don't think it will affect my relationship with high street shops. I know a lot of places are closing which is a shame but I will still go into the high street" – ***Female, 17, Urban, VOD:Bingers***

"Yes because high street shopping is already expensive so when we officially leave the EU, prices will increase more thus I may not spend a lot of my time looking and buying high street products" **- *Anonymous***

"I don't think it will, I think I will still continue to shop on the high street for clothing and technology etc. Yes prices may go up but if I want and like something I am still going to purchase it." ***– Male, 20, Mainstream, Short:Snaps***

Why Tribes shop on the high street: Shopping is seen as a social event

The retail experience is seen as a social event for Tribes as they enjoy connecting with others to either get a second opinion or hang out on the high street to run errands, browse fashion and pass the time. For those who prefer to shop alone, the high street serves a practical purpose offering a sense of freedom where individuals can roam wherever they want, whenever they want. But for the high street to stay relevant among this age demographic, physical stores need to quickly adapt to young adults shopping preferences and behaviours to provide a seamless in-store shopping experience that they can't find online.



Popular shopping destinations

- Zara
- Topshop
- Primark
- River Island
- Next
- Pull & Bear
- Mango
- Urban Outfitters

Occasions to shop

- Shopping for sixth form clothes
- Shopping for work clothes
- Treating yourself to a new wardrobe for an event
- Checking seasonal sales for bargains

Things they said....

"I prefer to go shopping by myself because then I can take my time and think about what I am buying properly and go to places that I want to go to. The last time I went shopping I went on a regular weekday, when it is slightly quieter. I went to Topshop, House of Fraser beauty dept, Kiko Milano, Debenhams beauty dept, River Island, Primark, H&M, Boots, Superdrug, Nike, Paperchase. I bought some makeup - liquid lipsticks, concealer, mascara, new eyelash glue, new eyeshadow and fix+ spray - some socks from Nike for going to the gym, new leggings from Topshop in the sale and a pair of boots from Primark in the sale. - **Anonymous**

With my best friend, just after my birthday so I had money to spend and needed some new clothes. We went to Oxford street, Topshop and other shops. All I got was a t-shirt and a pair of jeans from Topshop but I ended up returning the top, oops! **- Female, 16**

"I was with my friend, we were shopping for sixth form clothes near the end of August. I bought a suit and top from H&M as well as a top from M&S" - **Anonymous**

" The last time I went shopping, I went with my parents in June because I needed new clothes. My parent. We went to the high streets and shopping malls of London, Brighton and Eastbourne. I bought smart work clothes (i.e. shirts and trousers) and summer clothes (i.e. shorts)." - **Female, 17, Alternative, Pop:Socials**

"I went shopping yesterday in TK Maxx with my mother and sister, there was no occasion really just a day running errands, I bought new make up brushes and a new make up bag because mine were getting old and tatty. They are pretty awesome." **- Anonymous**

Fashion

Tribes have a complex relationship with fashion. Many show an interest in fashion. Even if they like to feign indifference, they were more than happy to share snaps of some of their favourite and most valued items of clothing.

It can be as simple as wearing a comfortable pair of New Balance shoes to a simple dress they bought at Primark. Young adults are exploring their personalities through fashion and have high expectations of brands in 2019.







New Rules of Style: What do Tribes value in fashion brands today?

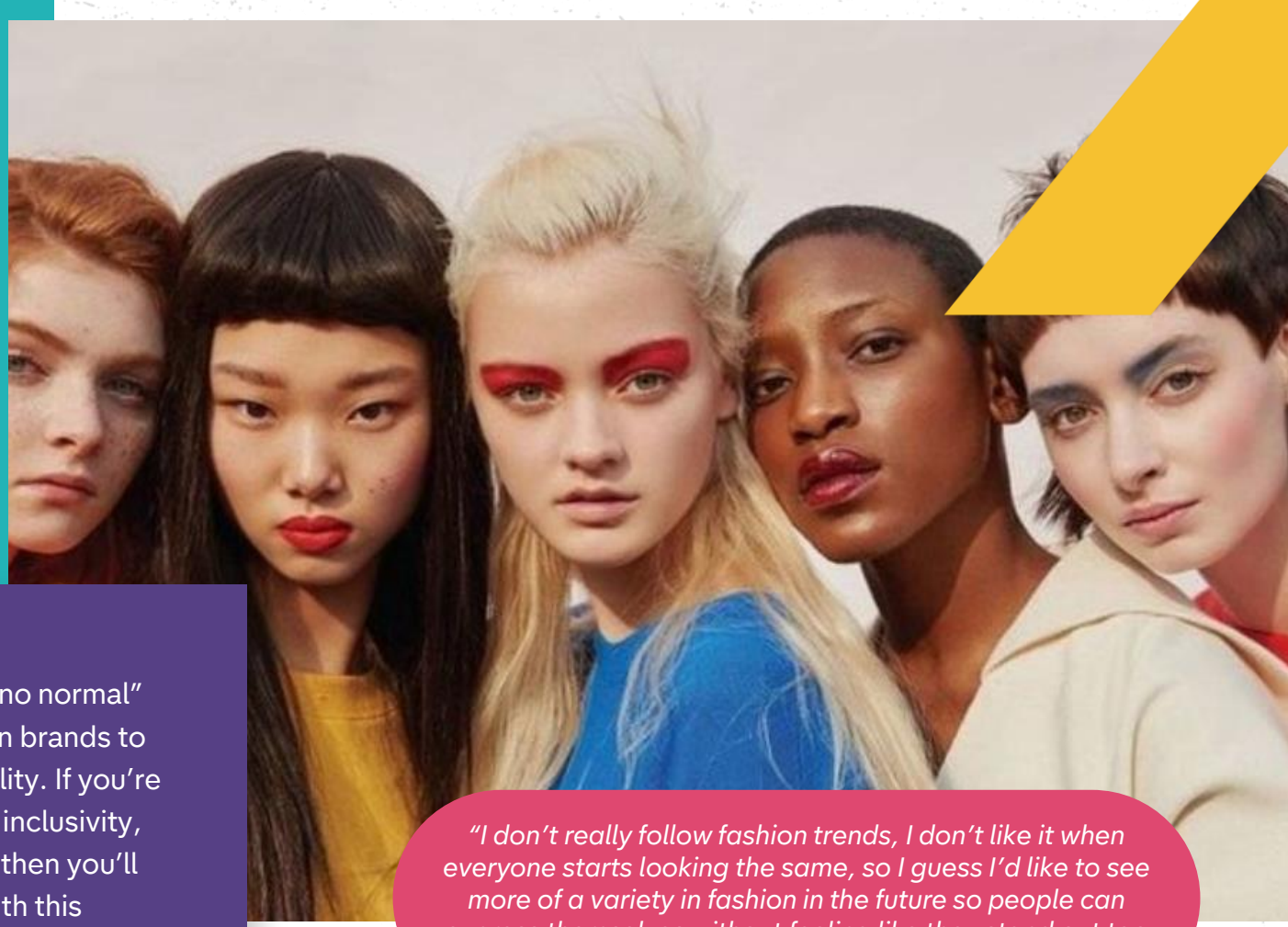
Today's young adults value comfort, unique styles and ethically sourced goods

It's not about brand collaborations or wearing the latest collection, Tribes want to feel good in what they wear and seek items that are comfortable, unique and sustainable. While their disposable income often limits them to a price range of somewhere between £10 to £30, Tribes still enjoy shopping on a monthly-basis. Their shopping habits gravitate towards online purchases for cost and convenience sake as they keep and eye on their spending.

They tend to have a spontaneous and casual approach to shopping, looking for styles they come across rather than aiming for a specific 'look'. It's still common to shop at high street retail stores like Zara, Topshop and Primark but the youth of today are beginning to pay attention to brands that move away from fast-fashion.

"I'd love to see brands focusing more on what their clothes are made from and where they originated. It would be interesting to highlight UK brands and materials rather than what's 'fashionable' this season." – ***Female, 22, Aspirant, Short:Snaps***

What do Tribes expect to see from fashion brands in 2019?



You do you

Tribes strongly promote a "no normal" mind-set and expect fashion brands to respond with a similar mentality. If you're not projecting the image of inclusivity, diversity and transparency then you'll struggle to resonate with this demographic.

"I don't really follow fashion trends, I don't like it when everyone starts looking the same, so I guess I'd like to see more of a variety in fashion in the future so people can express themselves without feeling like they stand out too much if they're not that confident." – **Female, 17**

Diversity: Fashion should represent reality

Tribes don't believe perfection exists and expect to see brands represent a realistic view of real people wearing real clothes. They look out for a variety of clothes that showcase different body types and sizes as well as diversity among models who wear the products.





"I would to see more model inclusivity and body positivity for all body types, skin tones and cultures. I would love to see less cultural appropriation - preferably none - from models and well respected brands. I also like to see more vegan friendly footwear." - ***Anonymous***

"I'd really like to see how brands are embracing all body shapes, as a larger lady myself I don't like to see all 100% perfect models all of the time but making clothes and adverts that cater for a wider range of people is so relevant and so important." – ***Female, 16***

Gender Fluid: The rise of unisex clothing





There is a growing trend of young adults rejecting gender binary labels, seeking fashion designs that reflect new notions of gender. Unisex clothing stands out among mainstream fashion trends for being unique, and allow Tribes to tailor their own individual look and style. A 2015 YouGov survey showed that half of young people aged 16-24 did not identify as 100 per cent heterosexual. Only 27 per cent of the population insisted that 'there is no middle ground - you are either heterosexual or you are not.'

"I'd love to see more gender neutral clothing options, as well as better options for different body types (e.g. tall women - I'm 6'3" and I'm pretty sure that Topshop's 'Tall' section is designed for women around 5'7" and above, so even that doesn't come close to fitting)." – ***Female, 20, Leading edge, Short:Snaps***

"I'd like to see more brands branching out into different styles! I often shop online because it's hard to find what I want in stores unless I want to look like everyone else." ***- Anonymous***

YouGov Survey Results, N= 1632



"I would definitely like to see more of a commitment to sustainable and ethical fashion. I use an app (good on you) that measures how sustainable brands are and it's really disappointing to see how UK high street shops do not do well at all." – ***Female, 22, Leading edge, Short:Snaps***

"More sustainable material use and less exploitation" ***– Male, 20, Urban, VOD:Bingers***

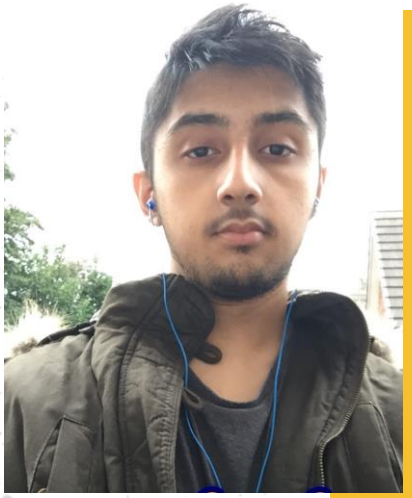
Sustainable Fashion: Green is the new black

The fashion industry is known for being wasteful and built on a take-make-dispose model. Fashion brands that manufacture clothes in a way that benefits people and communities while minimising impact on the environment, are seen in a positive light - but are very few and far between. Tribes take notice of brands that support socially responsible processes such as sustainable manufacturing and transparent supply chains, showing consumers how their product is sourced and made.

Some of our Leading Edge members pay extra attention and verify fashion brands through apps such as 'Good On You' to measure a brand's ethical standing.

Inside their wardrobes

This French Company Designer Peng Fur Daux Winter Coat £59, absolutely adore this coat and nothing will change it.



My jumper is from Bershka and I LOVEEE that shop, they do so many styles and are affordable. The jeans are super duper comfortable mom jeans from Zara. For mom jeans I feel they're really flattering as well. And the shoes well I wear them everywhere and I've had them a super long time. They're just some Nikes.



This is my current favourite outfit. I'm currently wearing Primark and did not expect to find this in there and thought it was rather vintage looking.



This is a pic of one of my favourite outfits ever (taken at an event last year)! It's just a black blazer, black trousers and heels, but I really like it - I hate wearing dresses, so this was a nice alternative. The trousers are from Uniqlo, and the blazer was an eBay find.



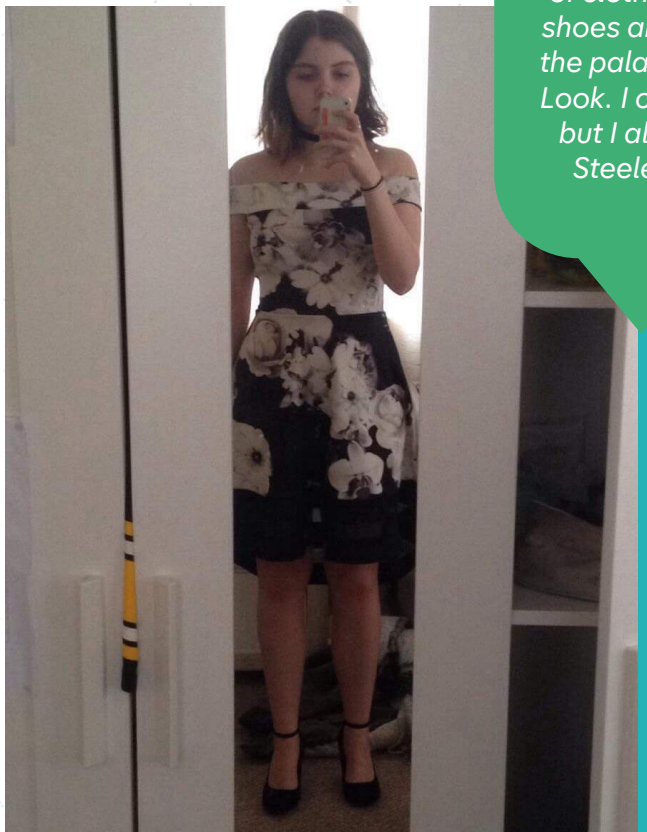
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Inside their wardrobes

This is my favourite outfit at the moment. My t-shirt is from GRLCLB.com, an amazing Glasgow based company who sell ethically sourced and sustainable clothing with a message. I adore everything on the website and I'd buy it all if I had the money. I get so many compliments on this t-shirt.

My skirt is from Topshop and it's my favourite atm, it's so comfy and is really flattering on. My bag is from Primark. I'm really trying to cut down on how much fast fashion I buy but I have literally used this bag everyday for like the last 6 months since I've bought it so I'm at least making it last.





I never wear dresses – I am always in sports clothing and hoodies - but I just always feel really pretty in this dress. I found it in M&S (moving up in the world I know) in the sale area for I think £20.00 (the most I've ever spent on an item of clothing). I just loved it. The shoes are heeled ones I got for the palace - I believe from New Look. I can not attach a picture but I also love my Pittsburgh Steelers jersey and my old football shirts.

Thank you!

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