

Summer 2025

provoke

insights

Apparel Trends & Consumer Buying Behaviors

Background & Objectives

Provoke Insights is a leader in research for branding, advertising, media, and content marketing strategies. To stay ahead of market trends, the company conducts a bi-annual study, delivering cutting-edge insights into shifting consumer behaviors across industries.

Now in its landmark tenth wave, this extensive study continues to uncover key trends in Americans' buying behaviors and attitudes toward AI's integration into shopping, including consumer receptivity and adoption.

For this wave, Provoke Insights developed 15 industry-specific reports—this deck provides an in-depth look at the apparel industry.



Methodology

Provoke Insights conducted a 15-minute online survey among 1,500 Americans aged 21 to 65 in March 2025.

To ensure a representative sample of the U.S. population, Census data was used to guide a random stratified sampling approach, balancing key demographics such as household income, age, gender, geography, ethnicity, and presence of children in the household.

With this sample size, the results have a maximum margin of error of $\pm 2.5\%$ at a 95% confidence level.

Statistical significance testing was conducted at the 95% confidence level, with differences between subgroups highlighted in callout boxes within the graphs.



Apparel Shoppers Are Highly Engaged but Price-Conscious

Apparel remains a major purchase category, with 56% of Americans buying clothing in the last month. However, purchases have dipped 10% compared to a year ago, suggesting some pullback in spending. Parents, affluent households, and millennials are the most frequent apparel purchasers, with high engagement also seen among suburban residents and those carrying a credit card balance.

Apparel shoppers lead dynamic lifestyles—they're significantly more likely to dine at high-end restaurants, travel, go to concerts or sporting events, and exercise regularly. These consumers are fashion-conscious but prioritize value, consistently favoring discounts over brand names. Despite this focus on savings, they still seek to stay on trend and dress for a variety of occasions.

Apparel companies should recognize this segment's value-driven mindset and lifestyle needs—offering stylish, affordable options and messaging that reflects their busy, social routines.

A rack of colorful, patterned clothing in a store. The clothes are hanging on wooden hangers, and the background is a warm, orange-toned wall. The text is overlaid on the right side of the image.

AI is Gaining Traction in Apparel Shopping, But Challenges Remain

Artificial intelligence is increasingly shaping the apparel shopping experience, with over half of apparel shoppers expressing interest in AI-powered tools. Consumers are particularly drawn to AI-driven fashion recommendations and virtual try-ons, indicating a strong demand for technology that enhances personalization and convenience.

Additionally, apparel is one of the most trusted categories for AI-powered recommendations. Consumers express a desire for AI to improve speed, personalization, and in-store experiences, signaling opportunities for brands to refine AI applications to better meet shopper expectations.

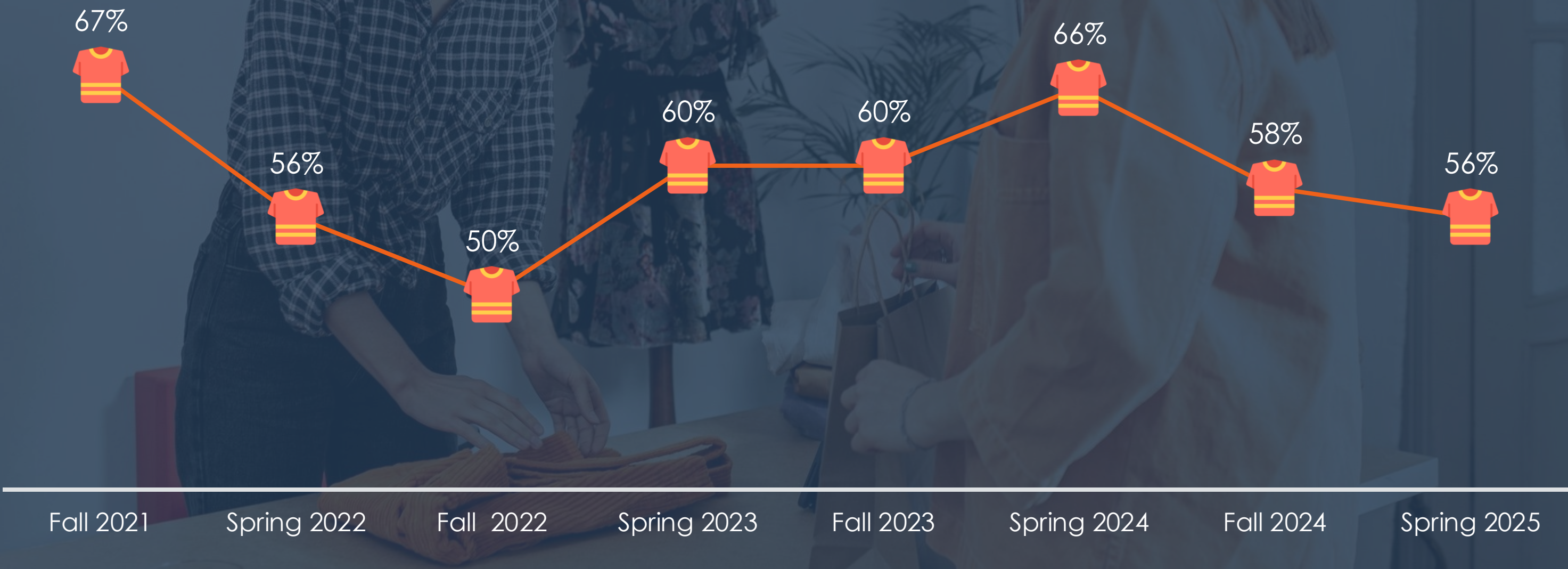
Apparel brands should lean into AI innovation by enhancing personalization and convenience through features like smart recommendations, virtual try-ons, and in-store assistance tools. Position AI as a trusted “style assistant” to increase engagement, especially among tech-forward and trend-conscious shoppers.

A photograph of a man and a woman at an outdoor market stall. The man, wearing a brown leather jacket, a blue baseball cap, and a denim shirt, is looking at a jacket hanging on a rack. The woman, with long red hair and wearing a grey dress with a brown belt, is standing in the foreground, looking towards the man. The stall is covered by a white canopy, and various clothing items are hanging on racks. The background shows other people and market stalls.

Apparel Trends

Seasonal Apparel Purchases

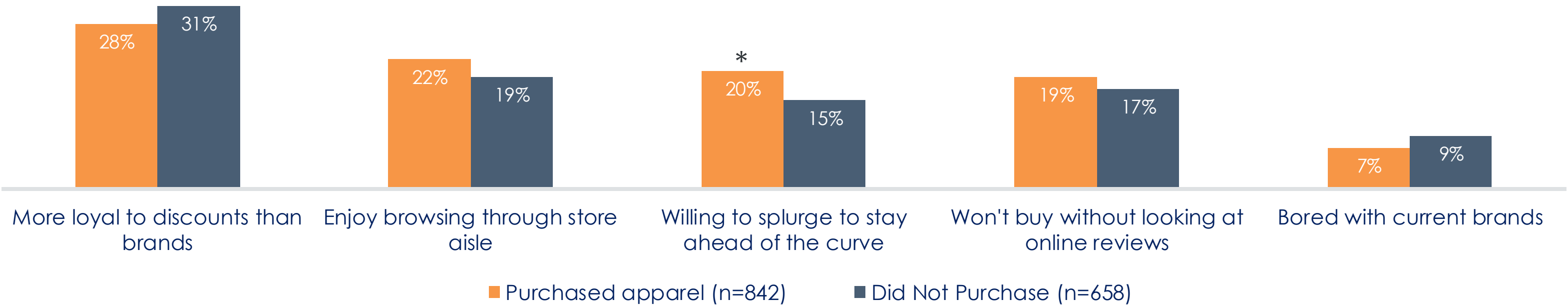
Clothing purchases have slightly decreased in the last six months.



Apparel Shopper Habits

Apparel shoppers prioritize discounts over brand names, focusing on value-driven purchases. However, they are still willing to invest in items that keep them on trend.

Top 2 on a 7-Point Agree Scale



*indicates significant differences

Apparel Purchasers

Parents, affluent households, and millennials are more likely purchasing apparel.

56%

of Americans
purchased apparel the
last month

Who is Significantly More Likely to Purchase Apparel



66% Parents



63% HHI \$150K+



61% Millennials



61% Suburb



61% Carry a credit card
balance

Apparel Shoppers Dress For Many Occasions

Consumers who purchase apparel lead dynamic lifestyles, actively engaging in diverse hobbies such as fitness, nightlife, and entertainment.



48% exercise outside
vs. 34%



35% go to the gym
vs. 22%



34% eat at high end restaurants
vs. 17%



27% travel domestically
vs. 16%



22% go to bars/nightclubs
vs. 12%



18% go to concerts/performing arts
vs. 9%



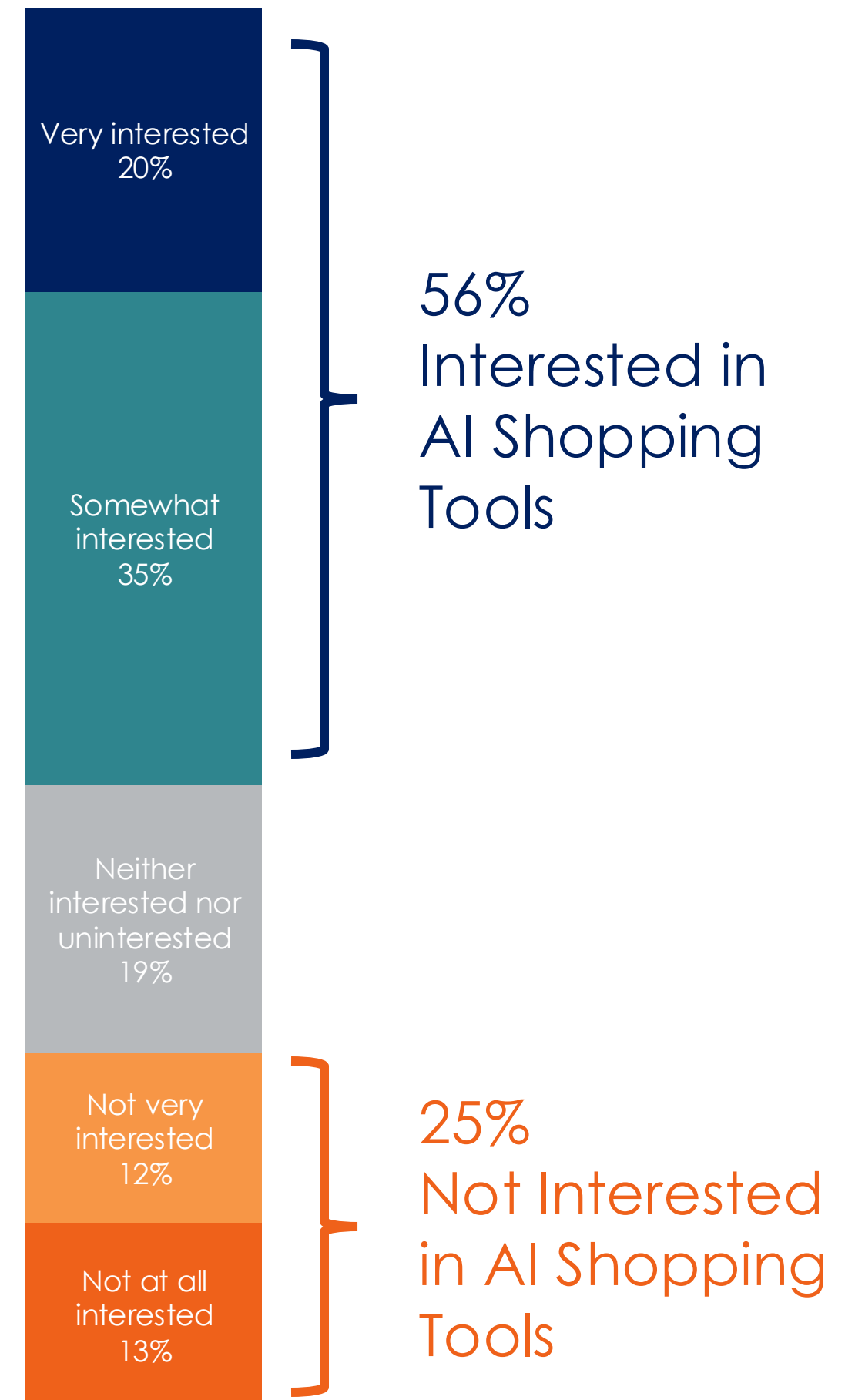
15% go to professional sporting events
vs. 6%

How AI is Shaping Apparel Shopping Trends



Interest in AI Shopping Tools Among Apparel Purchasers

More than half of apparel purchasers are interested in AI shopping tools.



AI Trustworthiness

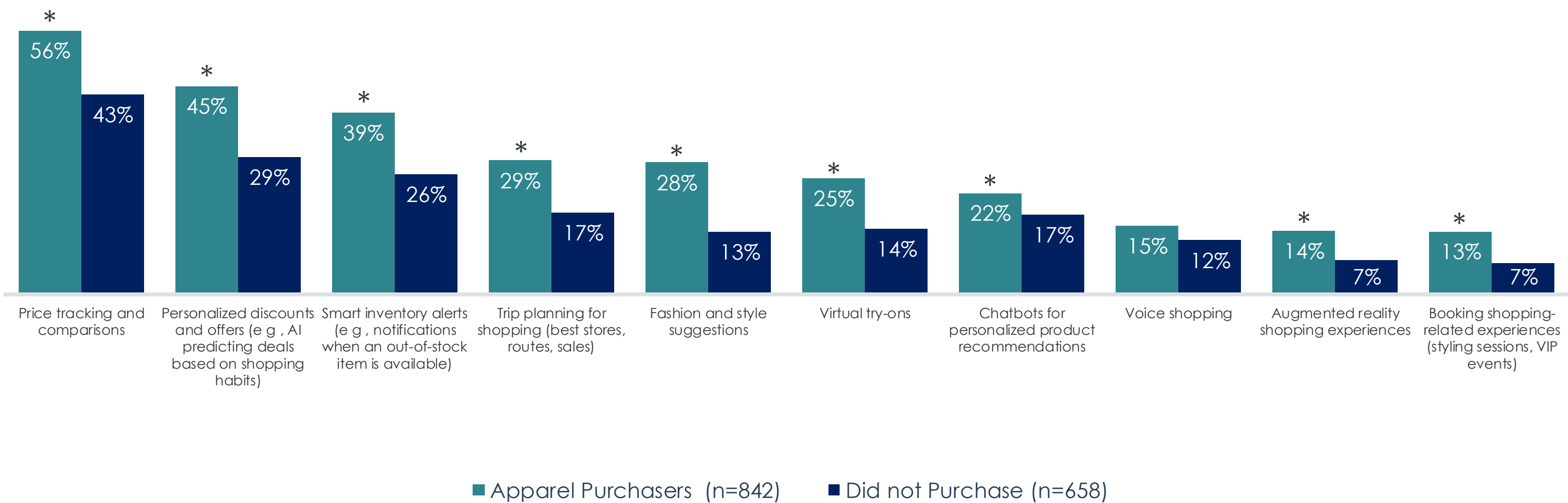
Apparel is a top trusted category for AI-powered recommendations.



Categories	AI Trust Ranking
Electronics	1
Travel	2
Home improvement	3
Apparel	4
Auto	5
Furniture	6
Fitness gear	7
Beauty/Skincare	8
Luxury items	9
Vitamins/supplements	10
Alcohol	11

AI-Powered Features Most Likely to Use

Apparel shoppers are among the most eager to embrace AI for shopping assistance, with one-quarter likely to use AI-driven fashion recommendations and virtual try-ons.

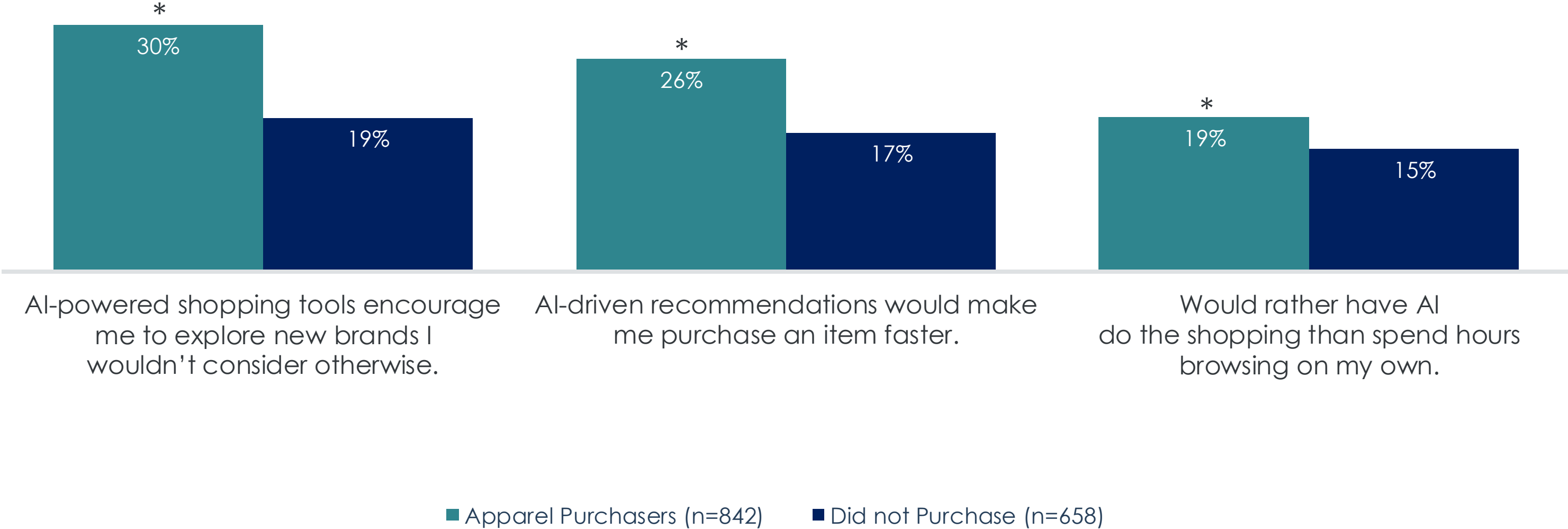


*indicates significant differences

Apparel Shopper Habits Concerning AI

AI-powered tools are especially valued by apparel shoppers for their ability to streamline purchases. Few desire AI to completely take over the shopping experience.

Top 2 on a 7-Point Agree Scale

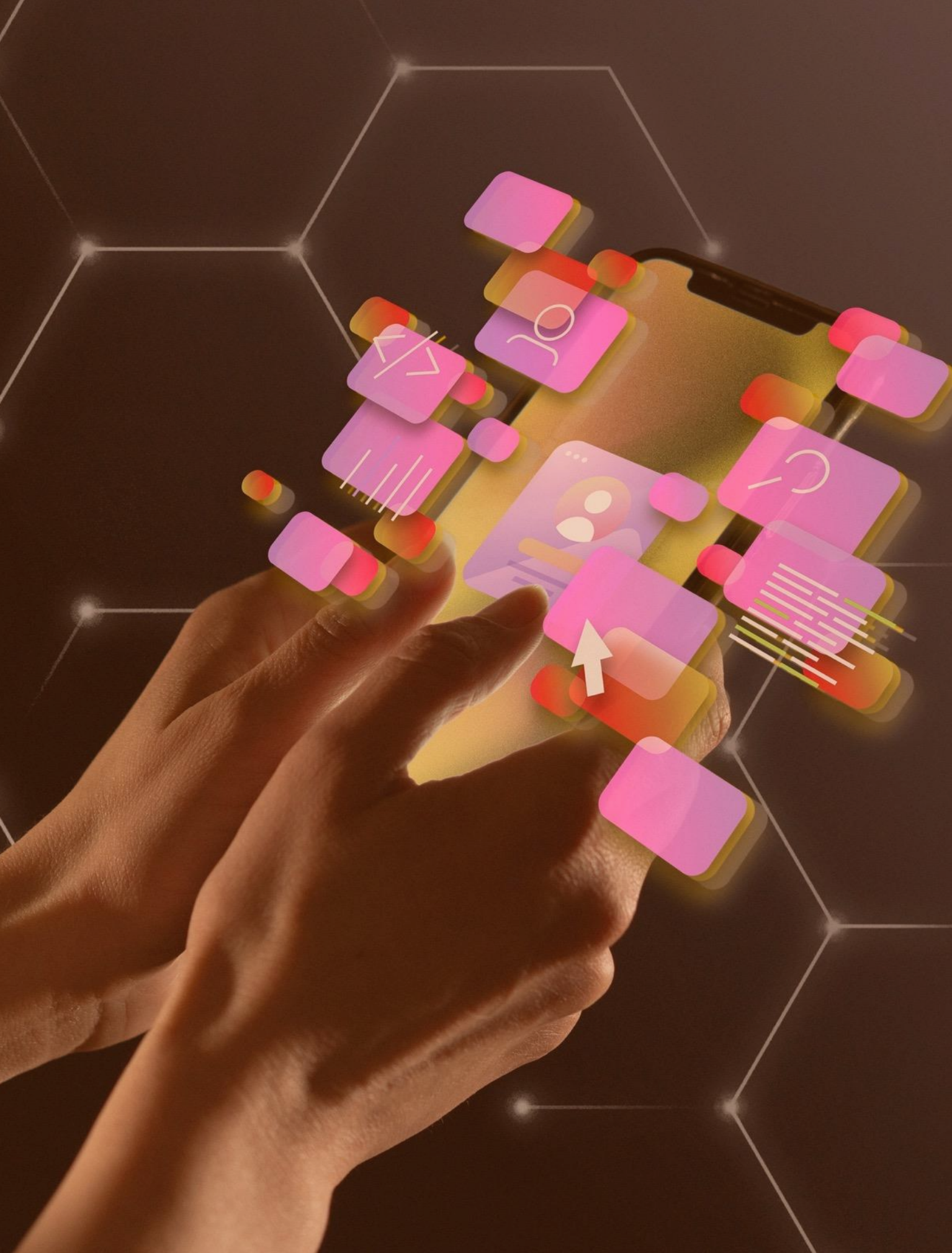


*indicates significant differences

AI Shopping Tools: Improvement Opportunities

Enhancing tailored experiences and speeding up the shopping process are key areas for enhancing AI shopping tools. Additionally, some users mention a desire for AI shopping tools to assist with the in-store experience.

Tailored Experience	Convenience & Cost	User Interface and Usability	In-Store Experience
<p><i>"It tailors recommendations to your tastes and preferences"</i></p> <p><i>"Personalized recommendations can make my shopping experiences more appealing to me"</i></p> <p><i>"More personalized options for me as a consumer"</i></p> <p><i>"I would like it if the AI could curate products, ratings, prices and locations on a comparison basis to ease and speed up the research process."</i></p>	<p><i>"If it saved me time and more importantly money"</i></p> <p><i>"The ability to order and pay for groceries that I need and want when it's time to get groceries."</i></p> <p><i>"It would help me make purchasing decisions faster."</i></p> <p><i>"Finding the cheapest and best option for what I'm looking for and creating a list."</i></p> <p><i>"I do really hate to shop. If AI could do the shopping for me that would make me happy."</i></p> <p><i>"If they could find discounts and deals."</i></p>	<p><i>"A clean, intuitive design that makes navigation effortless can significantly improve the shopping experience. Simplicity and accessibility are key."</i></p> <p><i>"Virtual try-ons or augmented reality simulations of how a product might work for me."</i></p> <p><i>"A perfect AI model that you can adjust the body size to a person's exact body measurements to try on an outfit."</i></p> <p><i>"It needs to be more seamless. Right now, it feels like a separate feature instead of a core experience."</i></p> <p><i>"The AI voices are too digitized. They would need to be more lifelike."</i></p>	<p><i>"I would love an AI shopping experience that helps me find things in the store."</i></p> <p><i>"Just knowing if the items I want are available in store."</i></p> <p><i>"I hate browsing in stores. AI help would make shopping faster and easier."</i></p> <p><i>"I genuinely like shopping. I would like AI to help find items in the store, comparing brands to each other to see which has better ingredients, and recommendations based on past purchases ."</i></p>



AI Ad Content

Television and Facebook are the platforms where apparel shoppers prefer to receive personalized AI-driven ad content.

Channels	Ranking
Television	1
Facebook	2
Instagram	3
Radio	4
News publications	5
Podcasts	6
TikTok	7
LinkedIn	8
Reddit	9
Blogs	10

Shopping Activities in the Last Month

Apparel purchasers are more likely to join loyalty programs, enter sweepstakes, and visit social influencer shopping pages.

	Purchased Apparel in the Last Month (n=842)	Did Not Purchase (n=658)
Joined a loyalty or membership program	30%	16%
Entered a contest or sweepstake	28%	22%
Visited a social influencer's shopping page	27%	16%
Shared or commented on a branded social media campaign	22%	12%
Participated in a referral program	16%	8%
Joined an online brand event or experience	13%	9%
Attended an in-person brand event or experience	12%	8%
Acted as a social influencer	6%	4%



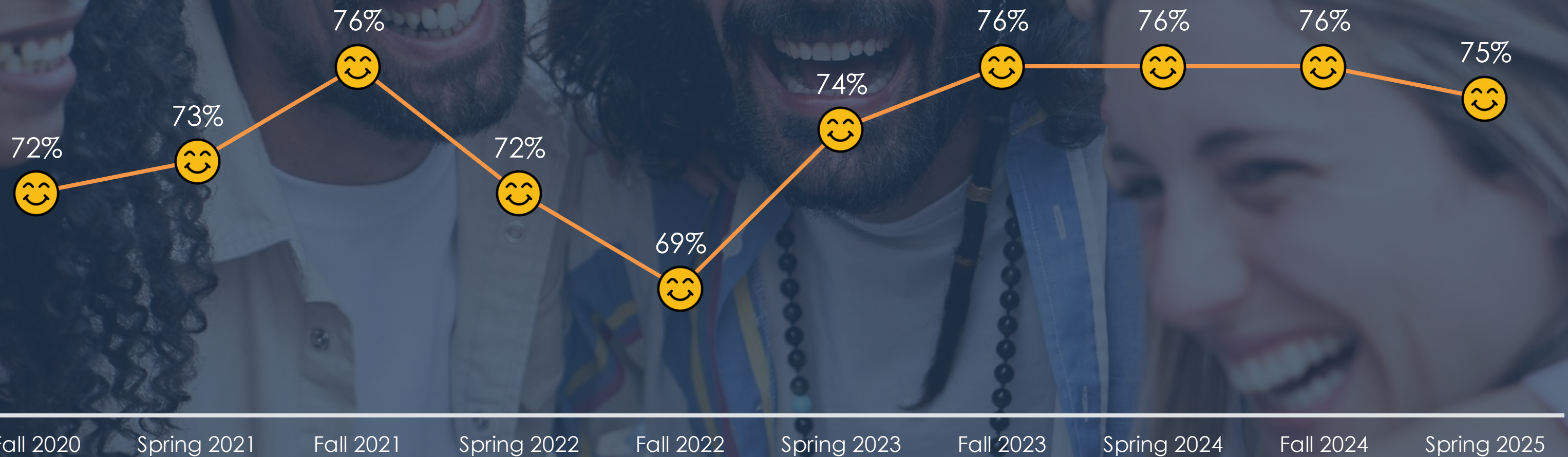
Optimism & Concerns



Consumer Optimism

Overall, Americans remain positive about the future.

Optimism
Top 2 box on a 4-point scale



Why are Americans Optimistic? (75% of total responses)

Americans who are hopeful about the future point to the current administration as a major factor behind their optimism. Additionally, belief that financial stability, possibility of tech advances, and personal plus familial health also adds to their positive outlook.

Political and Economic Reasons

"The new administration has brought changes that have improved my living situation."

"I believe the economy will improve under the current leadership."

"The economy seems to be improving, and the efforts are being made to cut federal expenses to reduce national debt."

Financial Stability

"My job is secure and high paying"

"I believe I will be financially very stable in coming years"

"I got a raise recently"

"I have added a new exciting business picture with my existing business model and it will be very profitable."

"I am three years away from retirement and have worked to save for it."

Family and Personal Wellbeing

"I have a wonderful family and friends that are supporting. I have a career I love and my husband is very successful. We also have a nice sum for retirement."

"Seeing my grandchildren grow makes me keeping going."

"We are planning to move out of state and purchase a home."

"I have a good family, good wife, I have new born baby 8 months old. I am trying to make better life for my son and its actually make me optimistic."

"I have God in my life, a beautiful marriage and kids and all my needs are met."

Advancing Technology

"The possibility of AI to drive growth and innovation"

"I'm optimistic about the future because technology keeps improving daily, making life easier and more connected worldwide."

"I am optimistic about the future mainly because of the incredible advancements we're seeing in technology, sustainability, global cooperation, and new innovations in areas like renewable energy and more."

"Technology advancement will solve most problems in the future."

"Rapid progress in technology such as artificial intelligence"

Why are Americans Not Optimistic? (25% of total responses)

In the same vein, Americans who are pessimistic about the future also blame the current administration for their frustrations. Other contributing factors include concerns about financial instability, and climate change.

Governance Failures

"I am concerned about the direction of leadership in the country."

"I feel that the current policies are negatively impacting the country."

"There are unsettling developments in the government that contribute to uncertainty."

"I am concerned about policies that may negatively impact certain communities"

"The outcome of recent elections has made me less hopeful about the future."

"The government is scary. "

Financial Instability

"I am concerned about having enough financial resources for retirement."

"Inflation is reducing my purchasing power, and as a senior, I have limited opportunities to increase my income."

"Things are too expensive"

"Prices continue to increase while wages and income have remained relatively unchanged."

"Inflation and recent policy changes have created uncertainty about future affordability and financial stability."

Inflation shows no signs of stopping. Trump and Musk don't care what happens to the average citizen. I can't afford groceries or gasoline

Climate Concerns

"The increasing frequency of extreme weather events makes it hard to feel optimistic."

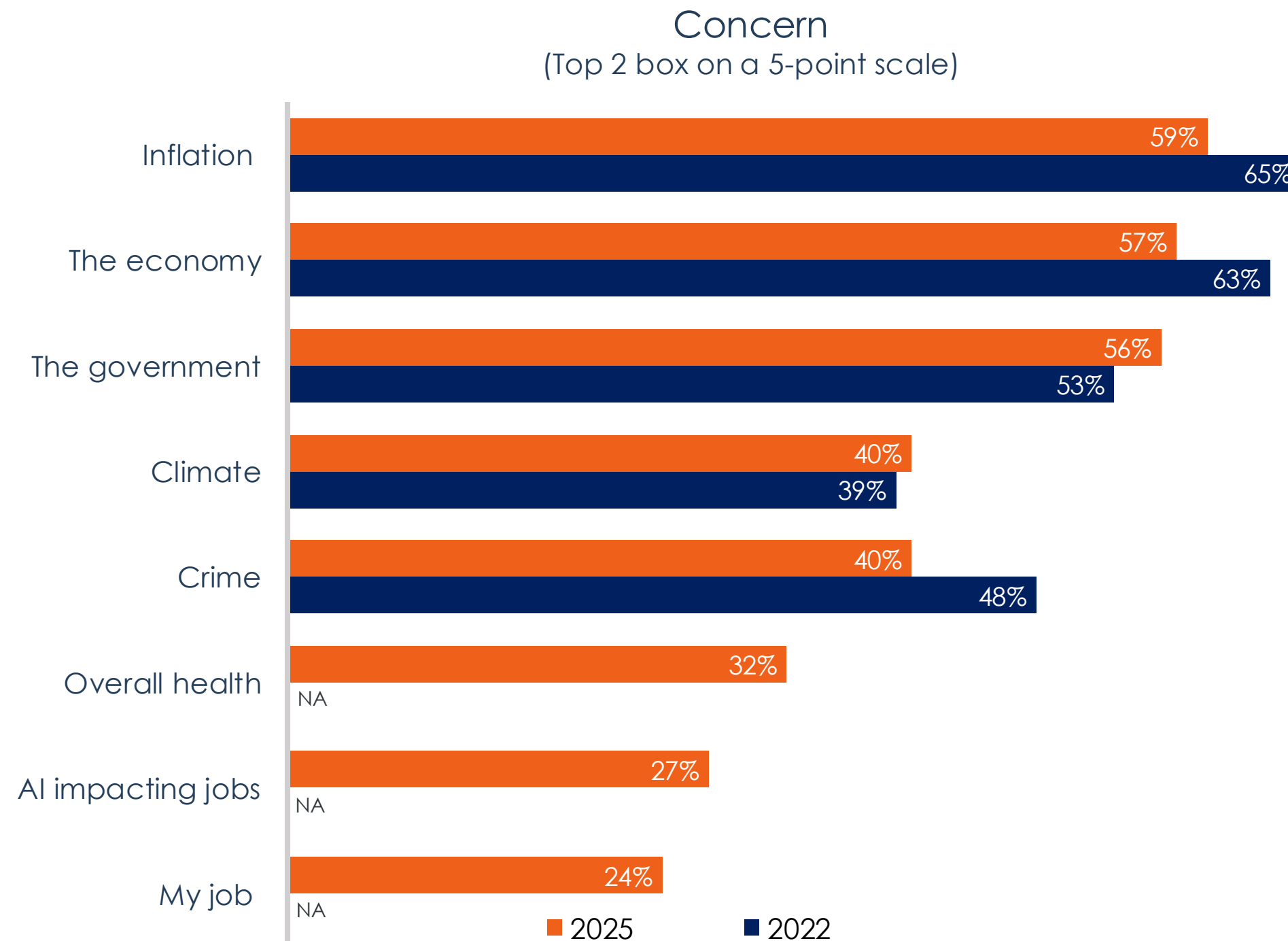
"There needs to be stronger action on climate change and there is little being done."

"I worry about the stability of the planet."

"The slow pace of climate action makes it difficult to believe meaningful changes will happen in time."

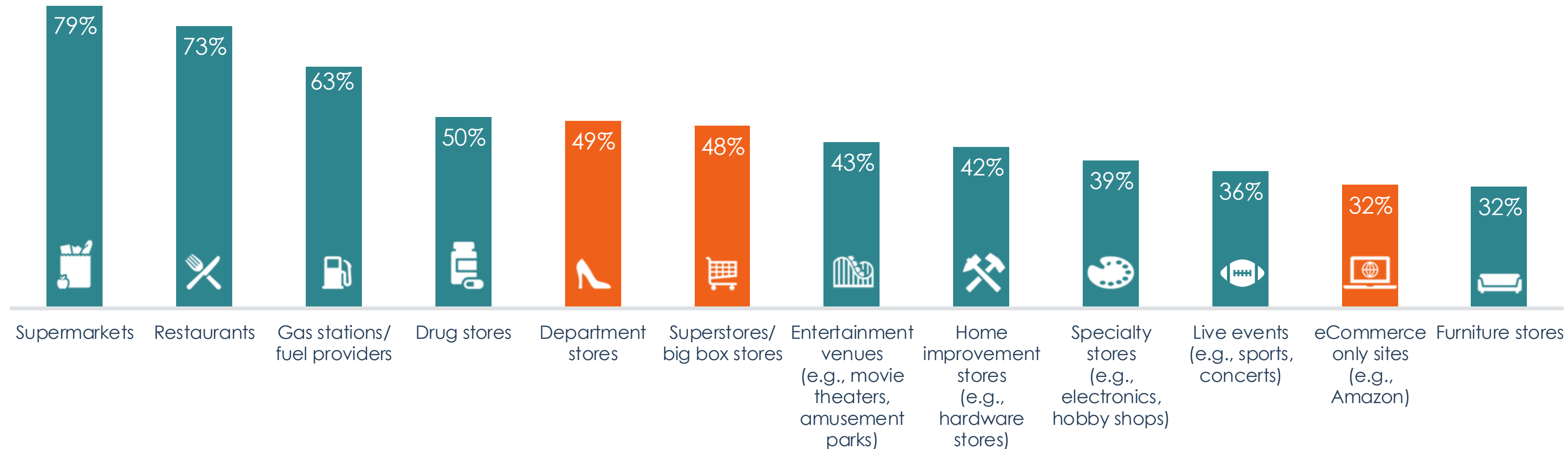
Top Concerns Impacting Consumers

Despite a decrease from three years ago, inflation and the economy continues to be the leading concern for Americans. Governmental concerns has risen since 2022, while crime has sharply declined.



Inflation Impact Across Different Types of Stores

While a half of consumers have seen price increases at department and superstores, it is not as high as supermarkets and restaurants.



Apparel Customer Profile

Respondent Profile

Gender



Female



Male

Apparel Shoppers

53%

47%

Gen Pop

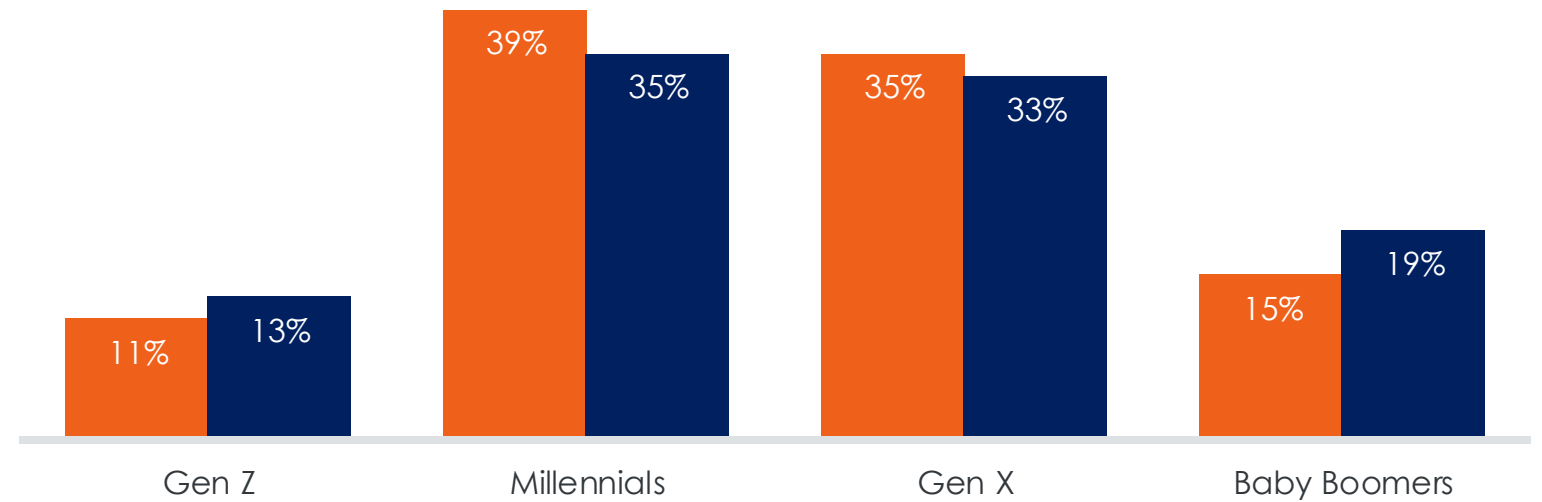
50%

49%

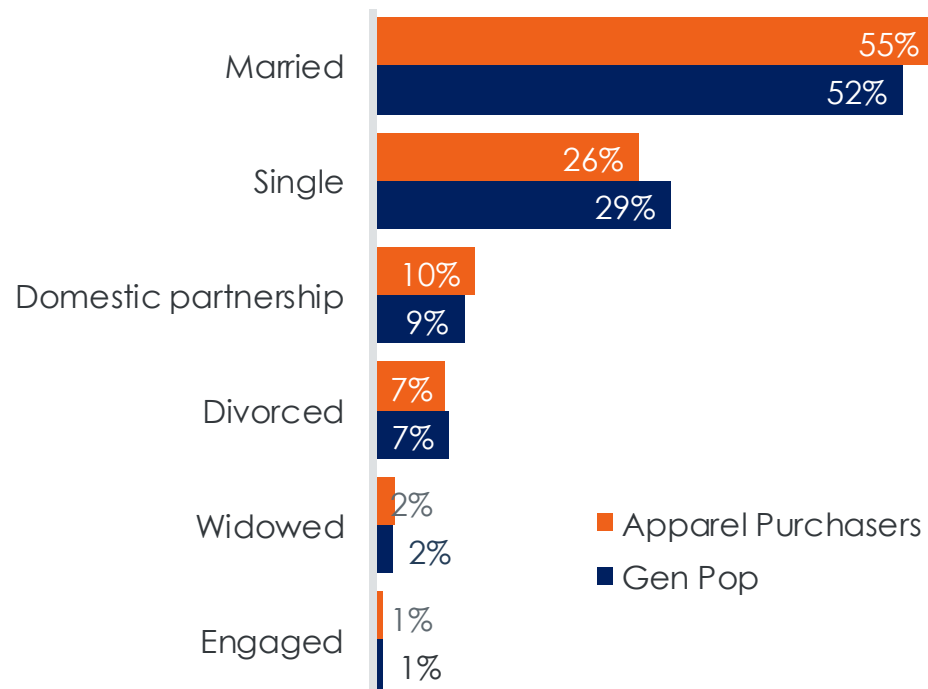
* <1% other identity

Generation

Apparel Purchasers Gen Pop

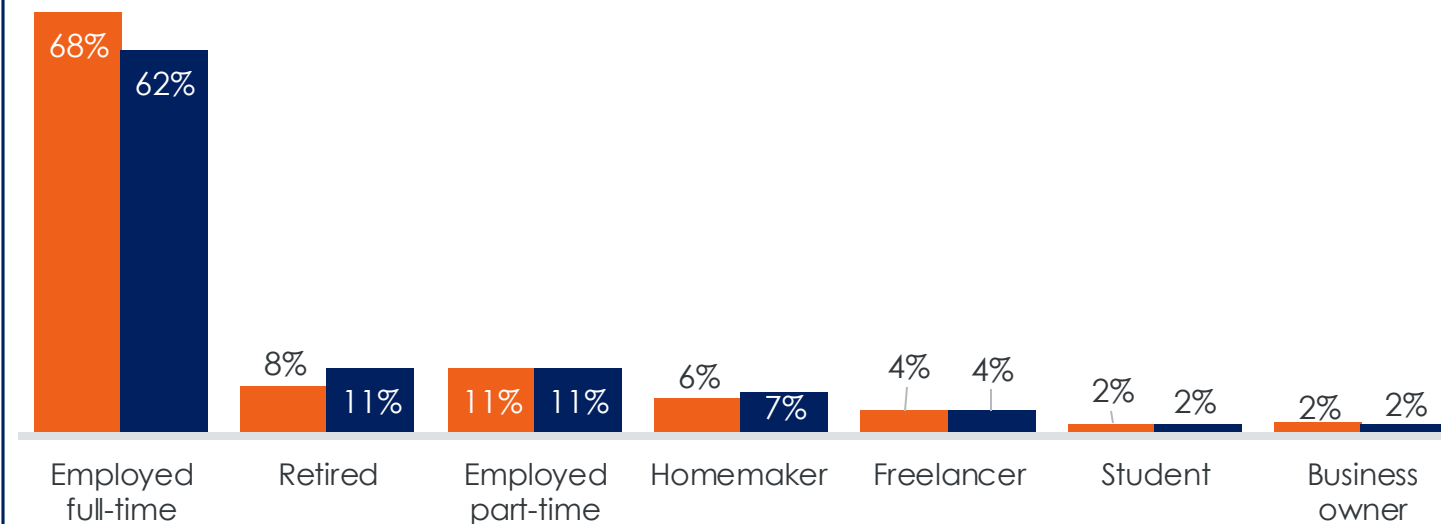


Civil Status

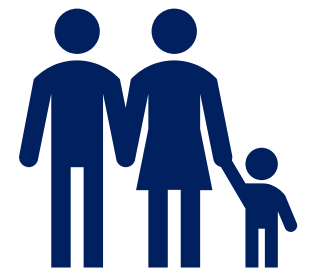


Employment Status

Apparel Purchasers Gen Pop



Parents of Children Under 18

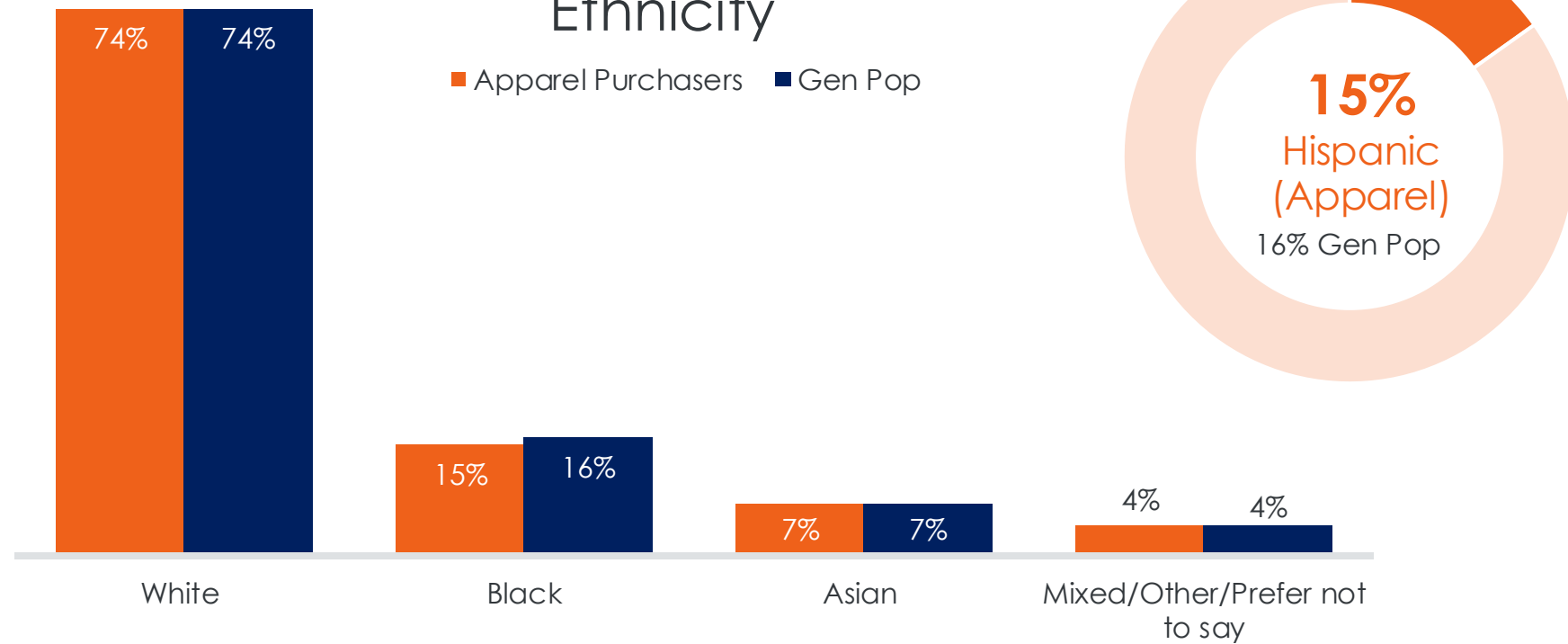


46%
Of Apparel
Shoppers

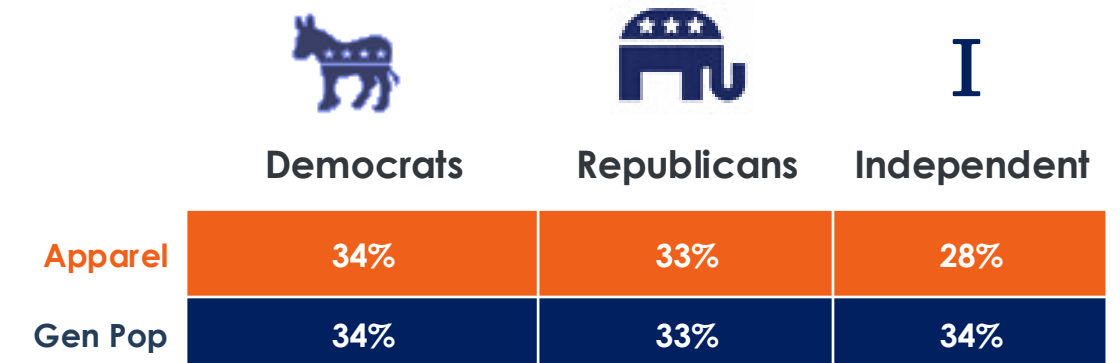
39%
Gen Pop

Respondent Profile

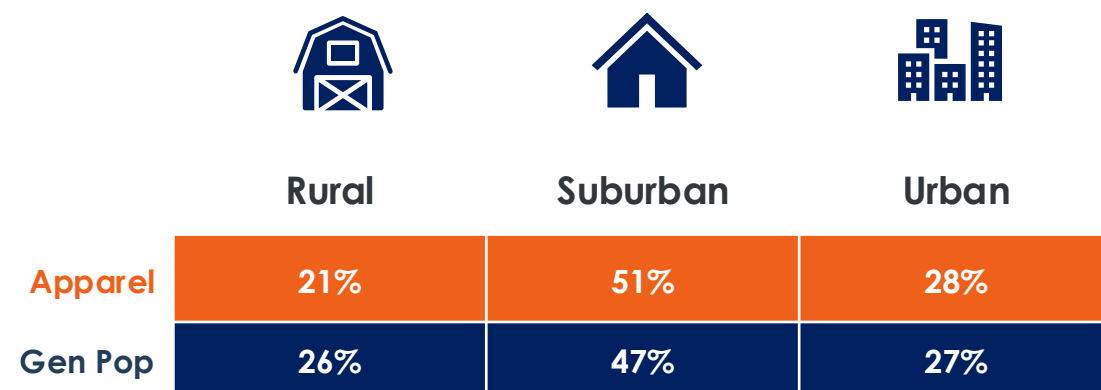
Ethnicity



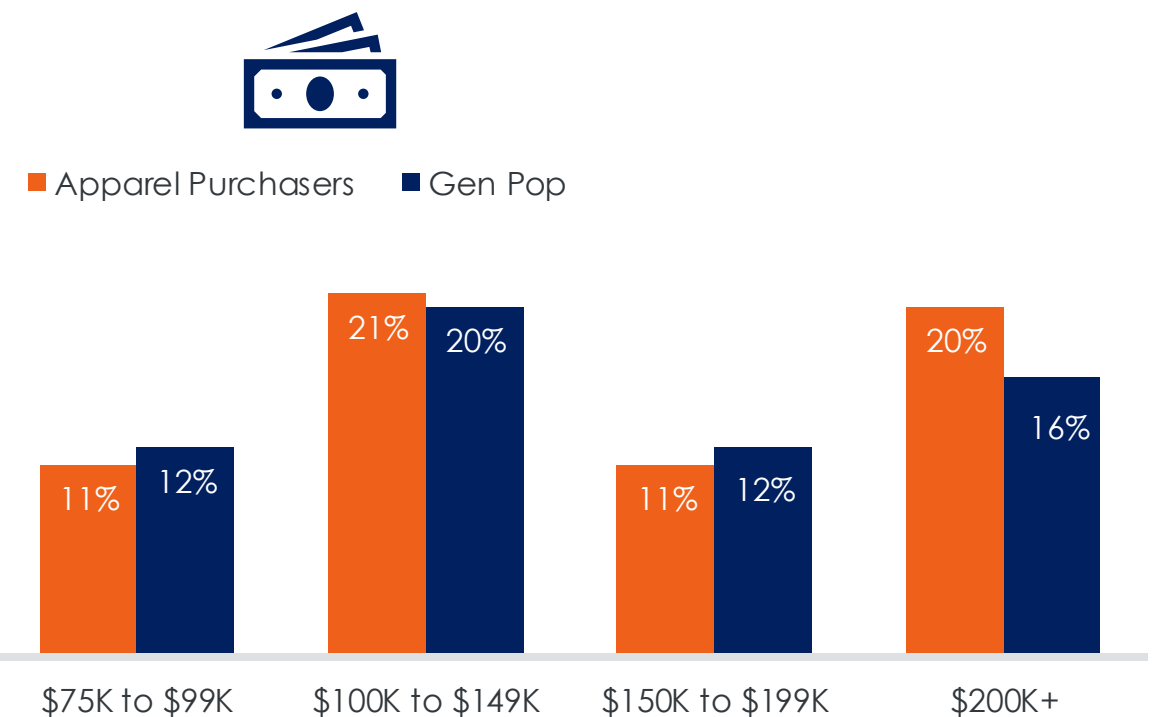
Political Party



Area



Household Income



About Provoke Insights

Provoke Insights is a full-service market research firm founded on the belief that research should better align with marketers' needs. Our mission is to empower brands by providing them with the insights they need to navigate today's ever-changing marketing landscape.

Unlike traditional market research firms, we take a more agile and innovative approach to our work. Our team is dedicated to developing initiatives that are designed to address the unique and evolving needs of today's market quickly and effectively.

What sets Provoke Insights apart from other research firms is our singular focus on branding and advertising initiatives. Our team consists of seasoned researchers who are also experienced brand and media strategists. With this expertise, we deliver actionable insights that help brands succeed in their marketing efforts.

For more information or press inquiries, reach out to info@provokeinsights.com.

