Apparel eCommerce Report 2025

Unlocking What Shoppers Expect And What Brands Need To Know

Market Trends **Consumer Behavior** **Emerging Opportunities**

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$197.4B

total US online consumer spend on apparel in 2024

The United States stands as one of the world's leading markets for apparel ecommerce, ranking second globally behind China. In 2024, it was estimated that US consumers spent $197.4 billion on apparel through digital channels, a figure that is expected to climb to $217 billion in 2025. That accounts for nearly one-fifth of global online apparel spending, meaning every five dollars spent worldwide includes one from the US.

While the pandemic accelerated online shopping, growth was already underway. Between 2017 and 2019, US apparel ecommerce grew 28%, driven by improved digital experiences and rising consumer trust. In 2020, the category experienced a massive 24.5% year-over-year jump, as physical retail shut down and consumers turned to ecommerce. What followed was not a temporary spike, but a permanent shift.

Apparel ecommerce continues to expand, fueled by growing consumer confidence, the convenience of mobile and app-based shopping, retailers' investments in digital capabilities, and more reliable fulfillment. Meanwhile, omnichannel strategies, social commerce, and deeper brand engagement through digital platforms have expanded the channel's relevance.

Yet despite this progress, online sales still represent only 38.1% of US apparel purchases, nearly double the average across all retail categories, but far from saturation. For brands, that signals a major opportunity.

What does this mean? The online apparel market offers huge potential, but success demands staying ahead of consumer expectations and embracing new technologies and channels. This report will provide a deep dive into the current state of the market, key growth drivers, and actionable insights to help brands capitalize on this dynamic and rapidly expanding landscape.

Shopping for apparel online has become routine for a growing share of US consumers

30%
of US consumers shop online for apparel at least once a week

4.5%
of US consumers shop online for apparel every single day

25%
of Gen Z women (ages 18–24) shop for apparel online daily

*from survey of 1,000 US respondents

Nearly one-third of U.S. consumers say they shop online for apparel at least once a week, with 14% shopping multiple times weekly and 4.5% shopping daily.

This trend is even **more pronounced among Gen Z shoppers (ages 18–28), where 59% shop weekly and 16% shop daily**.

Women aged 18–24 are the most active daily shoppers, with 25% shopping for apparel online every day.

What Drives Purchases?

Price remains the leading factor influencing online apparel purchases, followed closely by product quality. Convenience is also a major driver, as shoppers increasingly expect free and fast shipping, seamless returns, and easy checkout experiences. Discounts and promotions, along with strong customer reviews and a trusted brand reputation, further help tip the scale in favor of a purchase.

Notably, **Gen Z shoppers place even greater emphasis on product quality**, which signals a shift in priorities among younger consumers toward value, durability, and authenticity.

Top Apparel Category Purchases

Percentage of consumers who said they shop for each apparel category online

84% Casual clothing (e.g., jeans, t-shirts, sweaters)

63% Footwear (e.g., sneakers, boots, sandals)

53% Activewear and athleisure (e.g., workout shirts, leggings)

40% Sleepwear and intimates (e.g., pajamas, underwear)

39% Accessories (e.g., bags, hats, jewelry)

31% Outerwear (e.g., jackets, coats)

* Other popular categories include children's clothing (e.g., baby clothes, uniforms), work or business attire (e.g., dress shirts, blazers, skirts), swimwear (e.g., swimsuits, cover-ups), and formalwear (e.g., suits, dresses, eveningwear)

*from survey of 1,000 US respondents

Casual clothing leads the way as the most purchased apparel online, followed by footwear and activewear. These categories reflect consumers' preference for versatile, everyday items that blend comfort and style. However, other categories like **formalwear and swimwear see less frequent online shopping**. This suggests that many consumers still favor in-store experiences for these purchases.

The Power of Brand Familiarity and Reputation

Brand recognition and reputation continue to play a central role in shaping online apparel shopping behavior. As of 2024, **Nike remains the top apparel brand in the US, followed by other well-known names such as adidas, Calvin Klein, Levi's, Ralph Lauren, and Skechers**. These same brands also dominate online purchase rankings, aligning closely with consumer demand for casual clothing, footwear, and activewear, categories that consistently top online shopping lists.

Trust and Familiarity Remain Key Drivers

While price and product features are important, **brand reputation is a key purchase driver, especially among shoppers aged 45 and older**. Two-thirds (66%) of consumers say they prefer established brands over lesser-known alternatives. Brand loyalty is particularly strong, with 78% favoring brands they've purchased from before. Even when faced with lower-priced options, the majority (62%) say they would still choose a familiar name due to the trust and reliability associated with known brands.

Loyal But Curious: Consumers Remain Open to New Brands

Despite strong brand loyalty in the apparel space, most consumers remain open to trying new brands under the right circumstances. In fact, **75% of surveyed shoppers say they are willing to try and explore new brands**.

Shoppers discover or encounter new apparel brands through a variety of channels:

64%
online marketplaces
(e.g., Amazon, Walmart, Target)

39%
social media
(e.g., Instagram, TikTok YouTube, Facebook)

38%
web searches
(e.g., Google, Bing)

36%
recommendations from family and friends

13%
endorsements from celebrities, athletes, and influencers

12%
social communities
(e.g., Reddit, Discord)

from survey of 1,000 US respondents

A Generational Shift in Brand Discovery?

Online marketplaces remain the top channels for brand discovery. This is largely due to the high purchase intent of users on these platforms, who are often actively searching for products and are more receptive to discovering new brands. The presence of sponsored ads and product recommendations also enhances visibility for emerging labels.

But discovery habits are shifting, mainly among Gen Z. While social media has traditionally been used for entertainment, it's quickly becoming a primary shopping touchpoint. **62.5% of Gen Z shoppers say social platforms are now their go-to source for discovering new apparel brands**.

What Motivates Consumers to Try New Brands

While brand loyalty remains strong, **competitive pricing stands out as the top motivator for trying new apparel brands**. 66% of surveyed consumers say competitive prices encourage them to explore and try unfamiliar brands. Other factors such as discounts, free shipping, positive reviews, unique product features (e.g., designs, high-quality materials), and recommendations from friends and family also influence shoppers' decisions.

Gen Z shoppers are more experimental, but they have high standards. For them, positive reviews are the strongest influence when considering new brands. Social proof is also crucial, with nearly half (48%) saying a brand's online presence, especially on social media, affects their decision to try it, compared to only 15% of older shoppers. Gen Z also prioritizes brands that align with their values and places greater importance on issues like sustainability, inclusivity, ethical labor practices, and social responsibility when making purchasing decisions. For this generation, a mix of strong reviews and meaningful brand values builds the trust needed to convert discovery into purchase.

Out-of-Stock Items Can Cost Loyalty

When a preferred item is out of stock, only 20% of consumers are willing to wait for it to be restocked. About a quarter will look for a similar product from the same brand, but **26% are willing to turn to a competitor**.

This highlights just how quickly brand loyalty can shift when availability or convenience falls short. Additionally, **13% of shoppers said they would abandon the purchase entirely**. These behaviors underscore the critical importance of inventory management: poor stock levels not only lead to lost sales but can also drive customers directly into the arms of competitors.
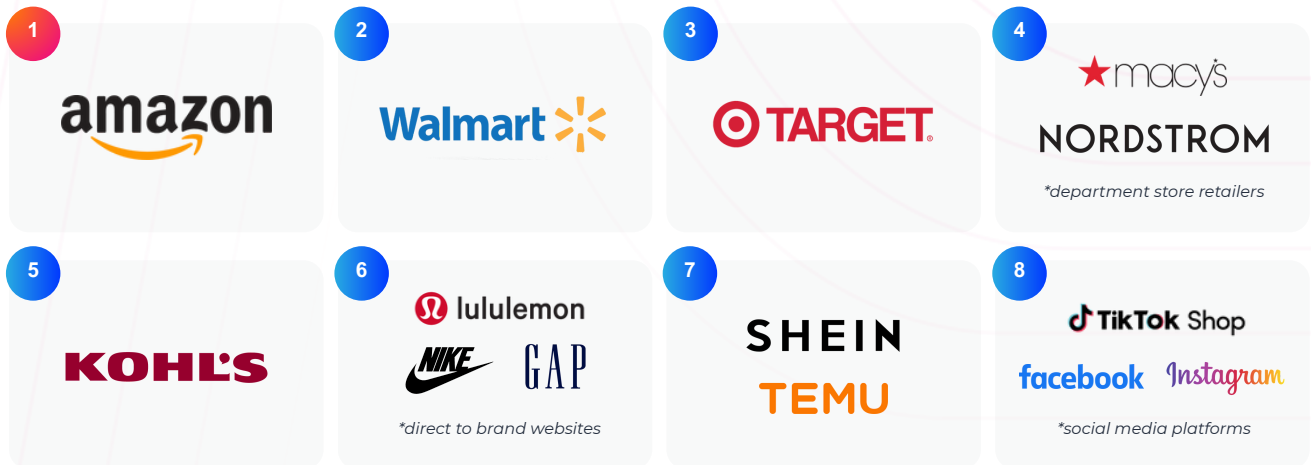
26%

of online shoppers will browse competitor brands when their preferred item is out of stock

SOLD OUT

Where Do Consumers Shop for Apparel Online the Most?

1 amazon

2 Walmart

3 TARGET

4 macy's
NORDSTROM
department store retailers

5 KOHL'S

6 lululemon
NIKE GAP
direct to brand websites

7 SHEIN
TEMU

8 TikTok Shop
facebook Instagram
social media platforms

Amazon leads as the top destination for online apparel shopping, with 72% of consumers saying they purchase apparel on the platform. Direct-to-consumer brand websites also represent a significant portion of shopper activity, while fast-growing value platforms like Temu and Shein are gaining traction, particularly among younger demographics. **Walmart is also very popular among Gen Z shoppers, especially those aged 18 to 24, with 78% reporting they shop there for apparel**. This trend likely reflects Gen Z's strong focus on affordability and perceived value.

Multi-Marketplace Visibility Is a Must

However, **most consumers today don't stick to just one retailer**. Instead, they shop across multiple platforms: **60% buy apparel from 2 to 4 different marketplaces, and 18% shop from 5 or more. Notably, 48% of frequent Amazon shoppers also shop at Walmart**. While Walmart trails Amazon in overall apparel sales volume, maintaining a presence on both platforms allows brands to expand their visibility and capture incremental demand, especially from price-sensitive consumers.

Relying on a single channel risks missing shoppers during key decision-making moments. A multi-marketplace strategy ensures that brands show up wherever consumers are browsing, comparing, and buying.

Amazon's Apparel Market by the Numbers

As highlighted earlier, Amazon is the leading destination for online apparel shopping in the US. This widespread consumer preference translates into significant spend. It's **estimated that over $62 billion was spent on apparel through Amazon in the US alone in 2024**.

The scale of Amazon's apparel ecosystem is massive, featuring over 68,000 apparel brands and hundreds of millions of unique ASINs. This extensive assortment enables consumers to shop everything from everyday basics to trend-driven styles, all in one place.

$62B

estimated total consumer spend on Amazon in 2024

Some of the **top-performing apparel brands on Amazon.com include Crocs, Hanes, Amazon Essentials, CRZ Yoga, Fruit of the Loom, Brooks, Gildan, Carhartt, The Gym People, and Shapermint**. These brands stand out not only for their volume but also for their ability to resonate with a wide range of shoppers through strong content, competitive pricing, and consistent availability.

3P Brands Dominate the Apparel Category

From a sales model perspective, **Amazon apparel is driven predominantly by third-party sellers, who account for 69% of sales**, while 31% comes from first-party vendors.

This 3P-heavy structure reflects the openness of the category and the opportunity it presents for both emerging and established brands to scale quickly.

69%

of apparel sales on Amazon are from 3P sellers

What Shoppers Look for Before Making a Purchase Decision

As apparel continues to be one of the most competitive categories across various marketplaces, it's crucial for brands to understand what shoppers expect and rely on.

According to surveyed online shoppers, the following are the **top factors they consider when reviewing product pages before making a purchase decision**:

72%
Product images

67%
Size charts
and fit guides

64%
Detailed product
descriptions

62%
Customer reviews
and ratings

45%
Shipping and
return policies

*from survey of 1,000 US respondents

Among Gen Z shoppers, peer validation is even more influential. For this group, reviews and ratings are the top factor, outranking images and fit guides in importance.

While reviews may not always top the overall list of priorities, their influence is undeniable. **Approximately 75% of consumers feel more confident purchasing items with a high volume of reviews**. Many also trust these customer reviews more than the brand's own product descriptions when making purchase decisions. Additionally, this "virtual word of mouth" is trusted by more shoppers than endorsements from celebrities or influencers.

Visual user-generated content (UGC), like customer photos and videos, adds another layer of authenticity. Seeing real-life images from fellow shoppers helps bridge the gap between expectation and reality, building trust, reducing returns, and ultimately driving higher conversion.

Why Reducing Returns Should Be a Priority

24.4%

of apparel items purchased online are returned

$48.1B

estimated worth of merchandise returned

Returns remain a significant challenge for apparel brands selling online. **In 2023, approximately 24.4% of apparel items purchased through ecommerce platforms were returned, resulting in an estimated $48.1 billion in returned merchandise**. When factoring in the average costs associated with processing returns in marketplaces, including logistics, restocking, and lost sales, total return-related expenses are estimated to range between $16 billion and $22 billion annually.

For individual brands, especially among the top 20,000 active sellers, this translates into an average return-related cost of approximately $800,000 to $1.1 million per brand each year. These figures highlight the critical need for brands to reduce returns through better product information, accurate sizing, and authentic visuals.

The primary reasons consumers return apparel items include issues with size or fit, which account for 38% of returns. Other common causes are quality not meeting expectations, products not matching the images shown online, customers changing their minds, and damaged items. Addressing these concerns is essential for minimizing costly returns and improving customer satisfaction.

How Sales Events Influence Apparel Shoppers

Key promotional events continue to serve as powerful catalysts for apparel purchases across online marketplaces. **43% of consumers say they "always" or "often" buy apparel during major sales events, with an additional 38% indicating they shop occasionally during these periods**. This pattern underscores the enduring influence of sales-driven shopping and the importance of seasonal timing for brands looking to drive volume.

Major Online Sales Events in the US

Q1 Sales Events

Valentine's Day

Amazon Spring Sale

Q2 Sales Events

Mother's Day

Father's Day

Memorial Day Sales

Graduation Season

Q3 Sales Events

Fourth of July

Amazon Prime Day

Back-to-School Season

Labor Day Sales

Halloween Sales

Q4 Sales Events

Black Friday

Cyber Monday

Green Monday Holiday Sales

Events like Amazon Prime Day, Cyber Week, and Holiday Shopping specials consistently generate strong shopper engagement. For instance, during Amazon Prime Day in 2024, apparel contributed an estimated $3.8 billion of the event's $14.2 billion in total sales. Similarly, Cyber Week saw approximately $24.1 billion in total online sales, with apparel accounting for around $5.6 billion, including a 374% spike in sales on Black Friday alone.

Search Interest Surges During Major Apparel Shopping Events

Amazon continues to outpace major retailers like Walmart and Target in online search interest, reinforcing its dominance as the go-to destination for ecommerce. **Search volume for "Amazon" spikes sharply during major sales events such as Prime Day, Black Friday, and Cyber Monday**, which reflects the increased consumer engagement during these critical shopping periods.
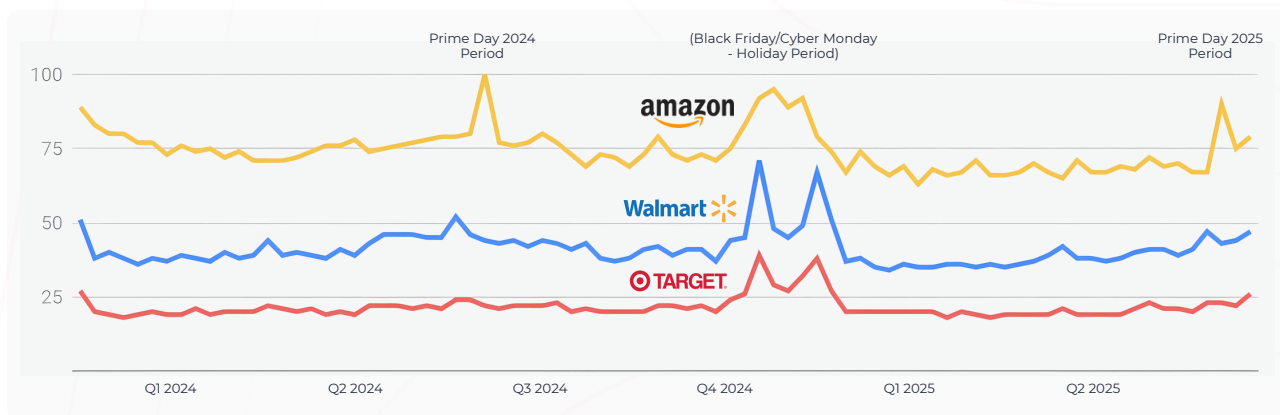
Source: Google Trends (January 2024 – July 2025)

Similarly, **search interest in terms like "clothing sales" reaches its annual high around Black Friday**. This seasonal surge highlights how promotional windows serve not only to drive traffic but also to influence purchase decisions, particularly for shoppers actively hunting apparel deals.
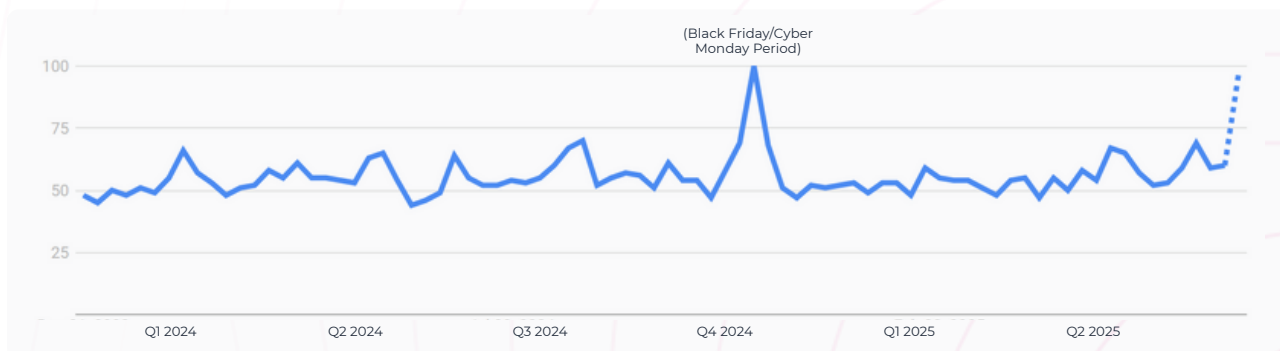

Source: Google Trends (January 2024 – July 2025)

Shopping on Social — A Growing Trend with Growing Pains

Social media platforms are rapidly transforming from discovery hubs into fully fledged shopping channels. In the US alone, social commerce sales are projected to surpass $100 billion by 2025, more than doubling from 2023 levels.

The most active social-commerce destinations today are TikTok Shop, Facebook Marketplace, and Instagram Shops. Other platforms of choice include Snapchat (Snap Store), Pinterest (funnels shoppers off the platform for checkout), and YouTube Shopping.

Consumer adoption is accelerating. This year, **more than one-third of shoppers report buying apparel on social platforms more often than in the past, and the shift is led by younger audiences**. 72% of Gen Z shoppers say their social-commerce activity has increased compared to the past year.
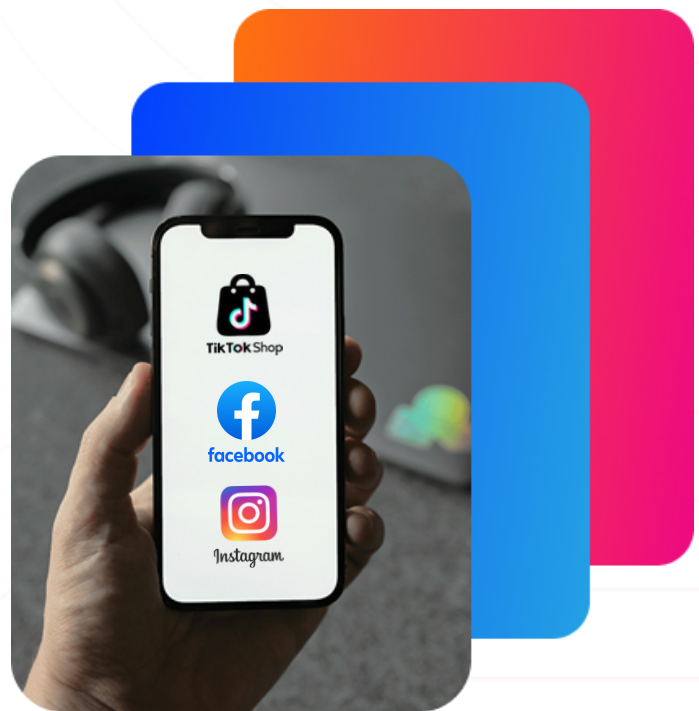
Despite this growth, shopper comfort hasn't fully caught up. **Only 35% of shoppers feel as comfortable, and even less trust the quality when purchasing apparel on social media as they do on established marketplaces or brand sites**. Confidence falls further for premium or specialty items, where assurance around product authenticity and quality becomes even more critical.

Why Shoppers Buy Apparel on Social Media and the Rise of Live Commerce

The following are the **top reasons online shoppers cite for choosing to shop through social commerce**:

1	**Unique product selection and variety**	5	Discovering new and trending brands/products on the app
2	Exclusive offers or discounts are available only on social media	6	Personalized recommendations based on my interests
3	Convenience (easy to browse and purchase in one place)	7	Ability to interact with the brand directly (e.g., comments, direct messages)
4	Trusted reviews and testimonials from other shoppers	8	Live shopping events with product demonstrations

*from survey of 1,000 US respondents

Shoppers are increasingly turning to social platforms for apparel purchases, driven primarily by the unique product selection and variety. This sense of discovery is further enhanced by exclusive offers, seamless video-led shopping experiences, and easy access to real customer testimonials through comments and reviews. **For many, social commerce provides not just convenience but a richer, more engaging shopping journey**.

Shopping in Real Time? Gen Z Is All In

Live commerce is also gaining momentum, particularly in the fashion and apparel space. While adoption is still growing, **21% of shoppers say they've purchased apparel after watching a livestream event**. The appeal lies in seeing products demonstrated in real time (fit, features, and benefits), making it easier to evaluate before buying. In fact, **39% of consumers say they're likely to buy an item featured in a livestream, and among Gen Z, that jumps to 52%**, signaling the rising influence of this format among younger, digital-first audiences.

The Impact of AI and Emerging Tech on Apparel Shopping

Artificial Intelligence (AI) and other emerging technologies, such as augmented reality (AR) and virtual environments, are transforming how consumers discover and shop for apparel online. What was once seen as cutting-edge or niche is now becoming an essential part of the digital shopping experience.

Hyper-Personalized Discovery and Shopping

At the heart of this transformation is AI's ability to personalize product discovery. Instead of endlessly scrolling or typing broad search terms like "blue dress" or "white sneakers," shoppers now receive tailored recommendations immediately upon visiting a website or opening an app. AI analyzes a wealth of data, from browsing habits and past purchases to social media behavior, to surface products that feel relevant and timely. **Visual search technology takes this even further. Consumers can now easily snap a photo of a look or an outfit they like and instantly find similar products**, a feature especially popular among younger consumers. This level of hyper-personalization not only makes finding products easier but also significantly increases the likelihood of purchase.

However, AI's influence doesn't stop at product suggestions. **It can also act as a virtual stylist by assembling complete outfits based on what shoppers add to their carts**. For instance, when a user selects a top, AI might recommend matching pants, shoes, or accessories, thus creating a seamless, curated shopping experience that encourages larger baskets and higher order values.

Bridging Online and Offline with AR and Virtual Try-Ons

Augmented reality (AR) is another key technology reshaping apparel retail. **While AR isn't exactly new, its integration with AI is making virtual try-ons more accurate and accessible**. Shoppers can use their phones or webcams to see how garments look on their own bodies in real time, eliminating much of the guesswork and hesitation associated with online apparel purchases. Even when AR isn't available, AI-powered sizing tools provide precise fit recommendations by analyzing photos or body measurements.

Consumers are responding positively: 35% say AR and virtual try-on tools boost their confidence when buying clothes online, and 32% are more likely to purchase from brands that offer these features. Among Gen Z, the demand is even stronger, with 50–60% favoring brands that provide virtual try-on or AI-driven sizing tools.

Making Online Shopping More Social and Interactive

Another commonly cited limitation of online apparel shopping to some consumers has been its lack of interactivity. **AI is changing that by powering chatbots that offer real-time guidance on fit, fabric, stock availability, and even personalized styling tips**. Voice commerce is also on the rise, with smart assistants enabling shoppers to browse and buy hands-free.

Virtual stores are also growing in popularity, especially among Gen Z shoppers. These immersive 3D environments let users explore digital shops, try on clothes as avatars, and even shop with friends, echoing the social, communal experience of traditional malls. Reflecting this trend, 35% of consumers are open to shopping in virtual spaces like the metaverse, with interest notably high among younger generations.

How Brands Are Harnessing AI: Balancing Innovation and Authenticity

For brands, AI opens new doors, but also new questions. **Many brands today are exploring AI-generated content to showcase their products**, which offers exciting creative possibilities while significantly reducing the time and cost of content creation. However, this approach also brings concerns about authenticity and the risk of promoting unrealistic beauty standards. Brands that succeed with AI-driven marketing will be those that remain transparent about their use of the technology. Striking the right balance between innovation and honesty is essential to maintaining consumer trust, particularly with the younger generations.

AI Accelerates Fashion Trends and Enables Agile Production

AI is also reshaping how brands respond to trends. **By monitoring social media, search behaviors, and customer sentiment in real time, AI can identify emerging micro-trends much faster than traditional methods**. What used to take months now unfolds in weeks or even days.

To keep up, many brands are shifting from seasonal collections to agile, data-driven production models. This approach lets them quickly respond to consumer demand, reduce waste, and avoid overproduction, which benefits both the environment and their bottom line.

Other Emerging Apparel Trends Shaping Consumer Behavior

As technology reshapes the way people shop, other cultural and generational shifts are also redefining what today's consumers expect from apparel brands.

Values vs. Action in Sustainable Shopping

Sustainability is top of mind for many shoppers, but it doesn't always translate into purchase behavior. Only 11% of consumers say they actively consider sustainable or eco-friendly materials when buying apparel.

However, the **willingness to support sustainable fashion is growing, especially among younger generations**. Overall, nearly half (42%) of shoppers say they're willing to pay more for sustainably made clothing, and that number jumps significantly among Gen Z. While sustainability may not yet be a dominant purchase driver, this generational shift signals a slow but steady move toward more conscious consumption.

Rise of Inclusive Apparel

The future of fashion is inclusive by design. **Today's consumers want more than diverse marketing; they want products that reflect real bodies and real needs**. Our recent survey shows that 68% of shoppers prefer to shop from brands that offer a wide range of sizes. In response, brands are changing their apparel lines to include adaptive features for people with disabilities and broader size ranges that fit more customers. But inclusivity shouldn't be treated as a seasonal campaign. With demand continuing to grow and expectations rising, it must be embedded into the core brand strategy.

The Fast Fashion Disruptors

Temu and Shein have rapidly expanded their presence in the US apparel market, driven by aggressive pricing, influencer marketing, and mobile-first shopping experiences that strongly appeal to younger consumers, especially women aged 18–24. Together, their estimated annual clothing spend reaches $7.7 billion for Temu and $5.3 billion for Shein, marking them as significant players in fast fashion.

Search interest patterns reflect this rapid growth but also highlight some challenges. Temu had minimal search activity in the US before surging dramatically starting in late 2022, peaking in mid-2023, and maintaining high levels since then. Shein's search interest peaked slightly earlier, even surpassing Temu's peak search volume according to Google Trends.
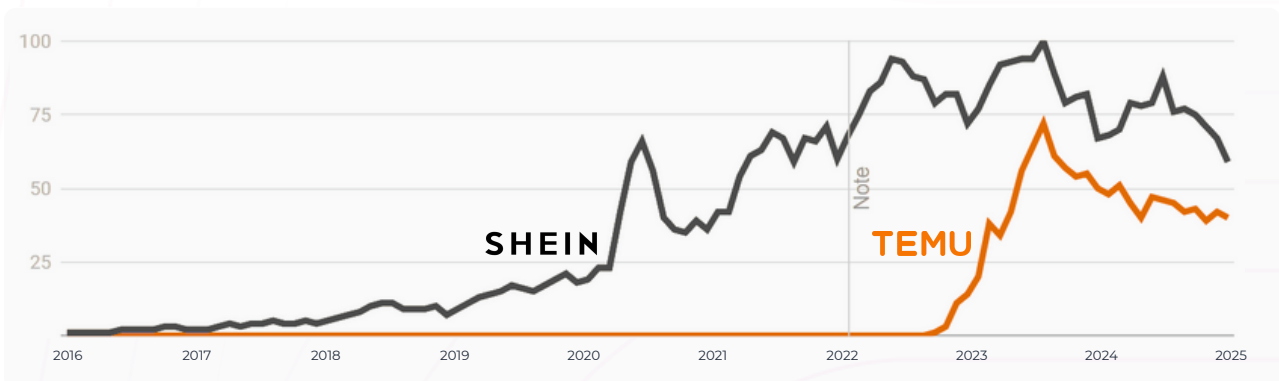
Source: Google Trends (2016-2025)

Despite their popularity, both platforms continue to face credibility questions among US shoppers. Common queries like "is Temu legit", "is Temu a scam?", or "Shein labor issue" reveal consumer concerns about authenticity and trust.

Although recent data indicates some slowing momentum, Temu and Shein continue to enjoy substantial growth and have secured their position as influential fast-fashion destinations within the evolving US market.

Conclusion

The US apparel ecommerce market is at a pivotal crossroads. As consumers increasingly demand experiences that are not only convenient but personalized and interactive, the brands that succeed will be those who go beyond traditional shopping experiences. It's clear that fashion ecommerce isn't just a retail channel. It's becoming a dynamic, tech-driven ecosystem where customer expectations are reshaping how brands engage, deliver, and innovate.

From the rise of Gen Z's shopping habits to the integration of AI, AR, and virtual try-ons, the opportunities for brands to elevate their digital experience are immense. But with the market becoming more competitive and consumers growing ever more selective, simply keeping up with trends is not enough. Brands must anticipate the next wave of innovation, whether it's through smart sizing, sustainability practices, or more inclusive and authentic representation.

As we look ahead to the future of apparel ecommerce, the key to long-term success lies in agility. Brands that embrace change, invest in technology, and stay attuned to the evolving preferences of their customers will not only survive but thrive in this exciting new era of fashion retail.

Methodology

As part of this research, we conducted a survey of 1,000 consumers in the US to gather data on online apparel shopping behavior, as well as broader insights into consumer attitudes and preferences. The survey included questions on shopping habits, platform usage, brand perception, and emerging technologies such as AI.

In addition to the survey, other data sources and analyses were used to provide context and support broader trends shaping the apparel industry as a whole.

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PODEAN INTELLIGENCE is our dedicated research division, focused on empowering brands with the insights and solutions needed to navigate the ever-evolving ecommerce landscape. Our goal is to help brands stay ahead of emerging opportunities and make informed, data-driven decisions. Our focus includes:

- Staying at the forefront of research on consumer behavior, marketplace dynamics, and emerging trends;
- Providing actionable insights that drive strategic decision-making;
- Tracking shifts and trends with a future-focused approach;
- Developing innovative solutions to help brands maintain a competitive edge.

To learn more about **PODEAN** and our Intelligence capabilities, visit podean.com or contact us at contact@podean.com.