

afterpay

Fall Winter 2022 Trend Report



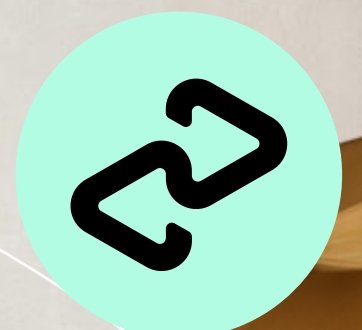
About the Report

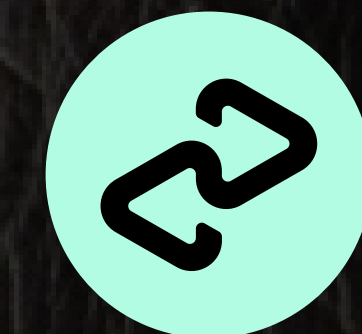
The Afterpay Bi-Annual Global Fashion, Beauty, and Lifestyle Trend Report

We have aggregated recent purchases made by our global customer base of over 20 million, across our catalogue of more than 144,000 brands and retailers,¹ to identify the season's key trends and shopping patterns.

What sets our report apart is our use of real-time customer purchase data looking into sales, coupled with the fact that an overwhelming majority of Afterpay users are categorized as Millennials and Gen Z.

This is not a wide-spectrum forecast. Rather, we are uniquely positioned to present a definitive guide to the global fashion and beauty landscape through the lens of how the world's highest-value and most powerful demographic is spending its money.





Meet Afterpay's
industry experts
who validate,
educate and inform
us on the "why"
behind the trend.

Shakaila Forbes-Bell is a Fashion Psychologist, consultant, founder of the platform 'Fashion is Psychology' and author of the book 'Big Dress Energy'.

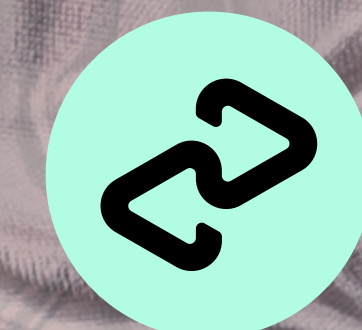
As the current in-house fashion psychologist for Afterpay, she helps brands and consumers alike understand the psychological significance of fashion and beauty trends.



Zanna Roberts Rassi is a New York-based, award-winning fashion and beauty journalist, stylist, television host, and co-founder of Milk Makeup.

She is currently the Fashion-Editor-at-Large for Marie Claire, E! News fashion correspondent, NBC Today Show fashion contributor, and Target Stylist.





Regional Trends

North America

Welcome to Afterpay's North America Trend Report, where we take a closer look at what Americans and Canadians are shopping for this season.

Find out what the hottest trends and items across the following categories look like.



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TOP TRENDS

Cowgirl Glam

Influences from the wild wild west have appeared on many runways this past year, with signs pointing to a merging of both Americana and European fashion for this upcoming season.

Sales for cowboy boots have doubled in the US and Canada, up 91% and 829% YoY, respectively. Fringe items were up 122% in Canada and 36% in the US YoY. Expect retailers to continue to invest in this trend by mixing more luxe elements such as silk robes overlayed with denim pants, double buckle belts, and embellished cowboy hats.

Shop this look with the top products from Afterpay partners:
Anthropologie: By Anthropologie Western Fringe Knit Kimono

Free People: Elle Fringe Vest

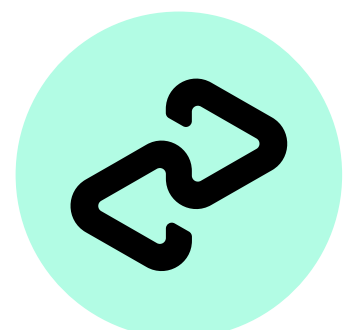


“ The classic western movie trope of the central hero figure neatly feeds into the modern concept of dramaturgy. Coined by Sociologist Erving Goff, he suggested we use our clothes to manage external perceptions because we see ourselves as actors and the world as our stage.

Much like how actors rely on costume designers to help the audience make correct assumptions about their characters, everyday people like you and me use clothes as props to present ourselves to others in very specific ways.

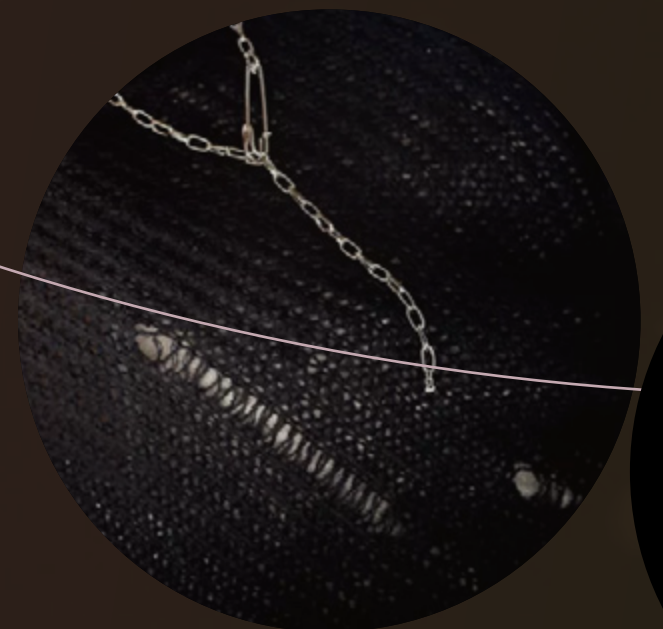
Shakaila Forbes-Bell,
Afterpay Fashion Psychologist

Steve Madden: LASSO Black Multi Boot





Shop this look with
the top products from
Afterpay partners:
[Revolve: Mercy
Cropped Jacket](#)



[Revolve:
Element Lace
Up Pant](#)



Fall Grunge

While legendary British journalist Suzy Menkes famously wrote in 1992 that “Grunge is ghastly!”,² the style easily won over the hearts of Americans with Marc Jacobs’ infamous SS93 collection, and again thirty years later.

Dark tones and knits are typically synonymous with fall. However, this season takes the look to a new level with plaids and leather. American and Canadian consumers are clamoring to add leather into their wardrobes - with sales up 27% in the US and 295% in Canada YoY. As consumers continue to seek inspiration from the 90s, other plays on the trend will include vintage graphics, baggy denim, and monochromatic layering.



Muted Metallics

Uncertainty in the macroeconomic climate continues to hold influence on both designers and consumers as they move away from dopamine dressing into a more subdued form of optimism through metallics.

While these shinier pieces are typically reserved for New Years Eve celebrations, Afterpay data indicates that consumers are opting for hints of metallics to adorn within their everyday wardrobes this season. Sales for metallic fabrics were up 19% in the US and 184% in Canada YoY. In both regions, gold is the fan favorite accent to rock this year.

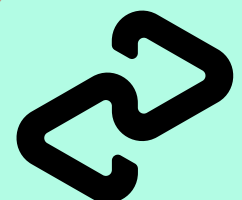
UO:
Disco Fever
Metallic Mini
Skirt

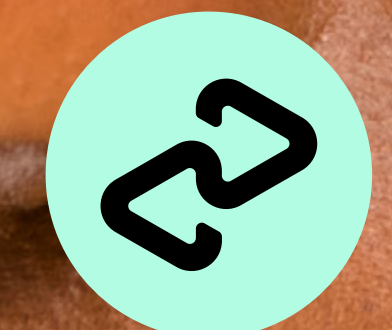


Shop this
look with the
top products from
Afterpay partners
Urban Outfitters:
UO Gia Metal
Halter Top



UGG: Class
Maxi Mini
Metallic





Shop this
look with the
top products from
Afterpay partners:

**Fenty Beauty: Cherry
Treat Conditioning
+ Strengthening
Lip Oil**



The Lip Oil Effect

A new take on the lipstick effect, lip oils are the latest self-care product to invest in.

As more consumers look to new skincare techniques, lip oil is taking over as the must-have item in consumers' beauty bags following the rise in popularity amongst beauty influencers and celebrities alike. Offering the shine of a gloss and the nourishing benefits of keeping lips ultra-hydrated all day long. Afterpay sales for lip oils doubled in the US and Canada, up 226% and 313% YoY, respectively, as a holy grail for the dryer winter months.



**Saks Fifth Ave:
Dior Lip Glow Oil
Color Reviver**

Beauty
Counter



Lush Locks

The transition from summer to fall ignites a common desire for change and new beginnings, with many seeking to do so through haircare.

Coined by Dr. Afiya Mbilishaka, PsychoHairapy involves using hair as an entry point for wellness. The movement, which involves self-care starting from your roots, has gained popularity and momentum, with hydrating hair products such as oils, serums, and masks - up 108% and 276% YoY in the US and Canada, respectively.



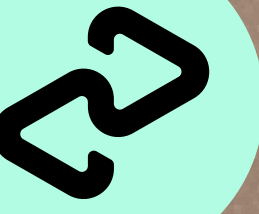
“According to Psychologist Harth W Blume-Peytavi, hair growth and hair disorders not only influence an individual’s appearance, but often lead to an enormous emotional burden with low self-confidence, impaired quality of life, and even psychological disorders. As such, consumers are investing in their hair to avoid these issues and further embrace wellness.

Shakaila Forbes-Bell,
Afterpay Fashion
Psychologist

Shop this look with the top products from Afterpay partners:

ULTA: No.8 Bond Intense Moisture Mask





Indie Sleaze

According to TikTok trend forecasters, hipster is not dead - it was merely dormant.

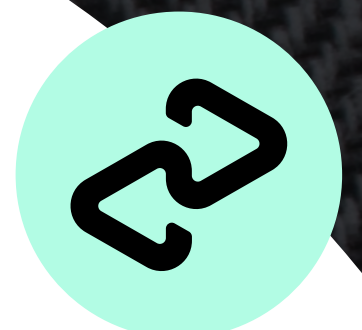
The Indie Sleaze makeup look is taking consumers by storm as they look to achieve that 'slept-in-your-makeup' look. In the US, there's a focus on smudged eyeliner, up 57% YoY and chrome eyeshadow, up 491% YoY, as shoppers move away from the perfection of the "clean girl aesthetic" and embrace the grungy, unbothered look.



Kat Von D:
Studded Kiss
Creme Lipstick

Shop this look with the top products from Afterpay partners:

ULTA: Bobbi Brown Long-Wear Cream Shadow Stick



Menswear Inspired Work Wardrobe

As mentioned in [Afterpay's SS22 trend report](#), workwear has evolved and women are taking a page from menswear by introducing menswear accessories into their wardrobes.

Women purchasing waistcoats are now becoming the norm, with sales nearly doubling in both the US and Canada, at 86% and 100%, respectively, showcasing a desire for more gender fluid ways to dress.

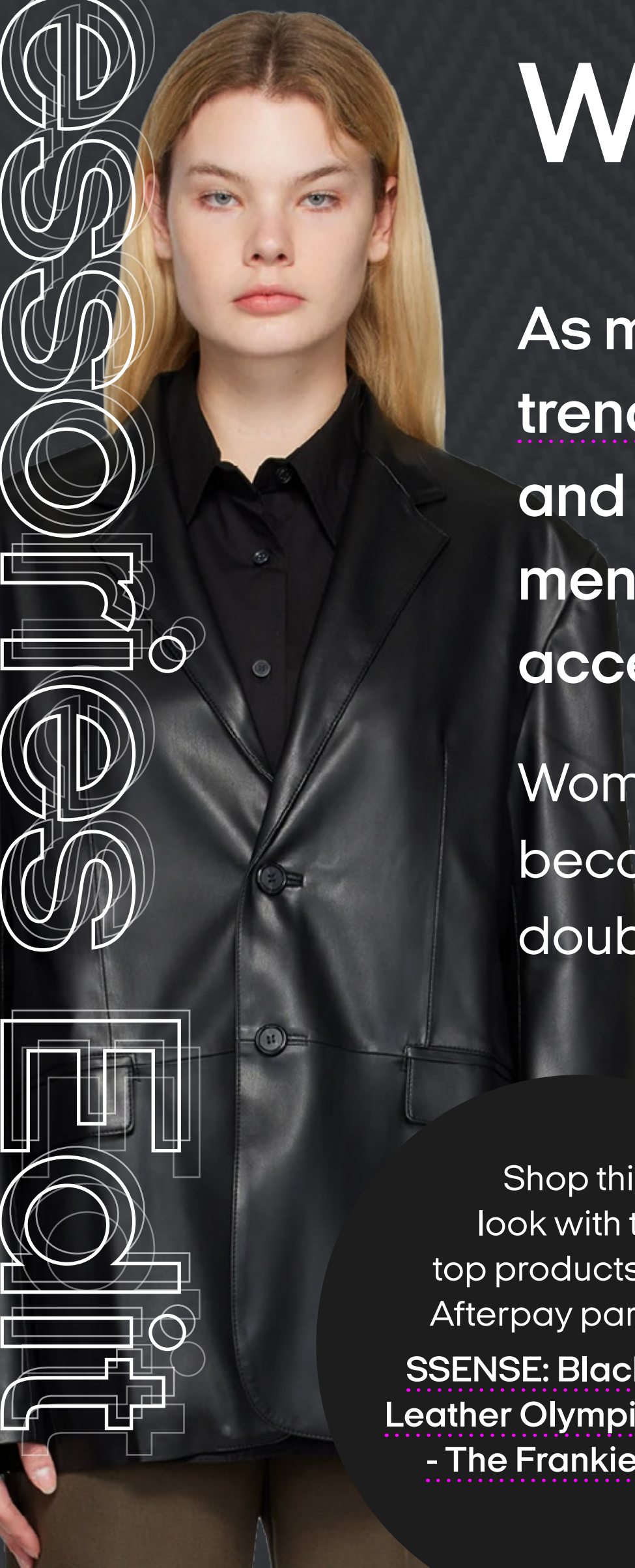
Shop this look with the top products from Afterpay partners:
[SSENSE: Black Faux-Leather Olympia Blazer](#)
[- The Frankie Shop](#)

[Free People Heritage Micro Vest](#)

“Clothing is increasingly being used as a vehicle for expressing gender identity and while consumer interest is there, many may be unsure of ways to execute a complete look or still feel confined to dress according to rigid gender norms. Masculine accessories allow many to embrace their form of gender expression in subtle and arguably safer ways.

Shakaila Forbes-Bell,
 Afterpay Fashion Psychologist

[Shoppop: Paul Smith Herringbone Tie](#)





Revenge Hair

With the revival of cult classic teen movies, the Y2K trend still has a grip on consumers - adding in refined hair accessories reminiscent of the early 2000s for a modern and effortless hairstyle.

Consumers are buying into the trend with butterfly clips, up 39% and 78% YoY, in the US and Canada, respectively. For more revenge hair styles, other popular items include thick headbands, snap hair clips, barrettes, and hair pins.



Lulus



Princess Polly



Pet Pampering

Even during inflationary times, pet parents have not been deterred from spending on their furry friends.

Just like their human companions, pets are dressing up too. US pet clothing purchased on Afterpay was up 42% YoY. In preparation for the chillier months, demand for pet hoodies and coats are up 30% and 395% YoY, respectively.



Recent studies have confirmed that pet ownership contributes positively to wellness. Consumers are opting to gain more happiness by pampering their furry friends. Studies have also shown that people are drawn to others that dress similarly to them so it can be argued that owners are trying to deepen their relationship with their pets by buying matching clothing.

Shakaila Forbes-Bell,
Afterpay Fashion Psychologist



JCPenney: Pet Life Allegiance Classical Plaid Insulated Dog Coat Jacket



Shop this look with the top products from Afterpay partners:
Dog Threads: The Great Yukon Sweater



Petsmart: Top Paw Dog Hoodie



Grandmillennial Chic

Inspired by Nancy Meyer films, the grandma chic aesthetic is turning into a full-blown lifestyle, with consumers mixing both old and new together in their homes.

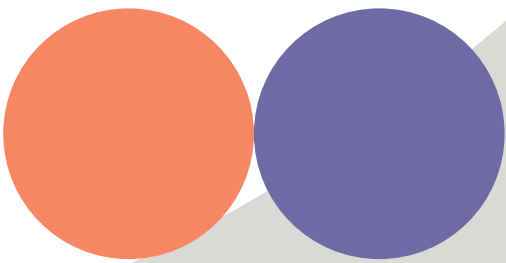
From vintage trinkets to kitschy statement pieces, consumers are showing off their personal style within the home. As an easy way to jump into this trend, consumers are buying more wallpaper as Afterpay sales were up 122% in the US and 150% in Canada, YoY. Popular wallpaper prints have included pastel florals and grasscloth.



Shop this look with the top products from Afterpay partners:
Anthropologie: House of Hackney Artemis Wallpaper



Urban Outfitters:
Pastel Floral Removable Wallpaper



Holiday Cheer All-Year Round

Since the start of August, Afterpay has seen US shoppers double down on their holiday spirit earlier in the year, as evidenced by the number of purchases for holiday related items.

Pragmatic consumers are investing in essentials with holiday ornaments up 46% YoY and Christmas tree stands up 325% YoY. Along with starting holiday gifting earlier, consumers will start investing more into smaller festivities like Halloween and Thanksgiving too as sales for seasonal and holiday decor items were already up 231% YoY.

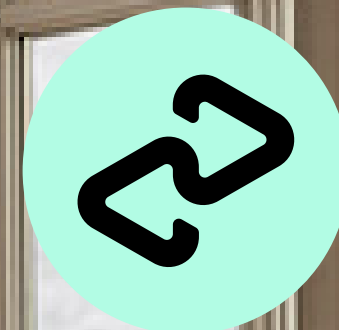


The chaos of the current socio-economic climate has encouraged people to seek out serenity wherever they can. As a result, shoppers are keen to avoid the massive queues and overcrowded shops that were seen in 2021 when lockdowns were lifted and they are continuing the trend of buying gifts ahead of the holiday season rush.

Shakaila Forbes-Bell,
Afterpay Fashion
Psychologist

Shop this
look with the
top products from
Afterpay partners:
**Best Choice Products: Pre-Lit
Snow Flocked Artificial
Pine Christmas Tree
with White Lights**

**Best Choice
Products: Pre-Lit
Artificial Fir Christmas
Wreath w/ LED Lights,
Plug-In, PVC Tips**



Up & Coming Trends

Looking beyond the fall and winter seasons, these are some trends Zanna Roberts Rassi, Afterpay Brand Ambassador, has certified are bubbling up on the runways and ones to keep an eye out for.

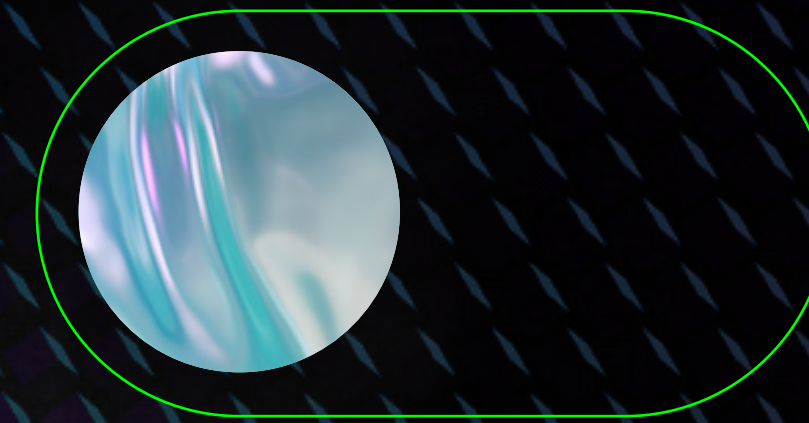


Tom Ford

Metaverse Fashion



Designers gave us a taste into the future with metaverse-inspired dressing this season. Luar and Tom Ford leaned into the trend by showing metallic fabrics and exaggerated silhouettes in body-contouring shapes. As more leading designers play into the world of NFTs, consumers are trying to keep up by incorporating vinyl fabrics, with Afterpay sales already up 42% YoY, respectively. Perfect for holiday season dressing! Expect even more experimentation from designers to come.



Luar

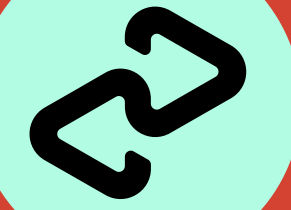


Subversive Basics

“ The comfort dressing era may be transitioning out as we enter the world of “subversive basics” – items that have been twisted subtly from their original design. Wiederhoeft and Tory Burch used buckles, belts, straps, and more to create a multi-layered look this runway season. Consumers are running to emulate this look, as evidenced in Afterpay sales for “buckles” and “straps” up 21% and 43% YoY, respectively. Anticipate subversive basics replacing staple items like your normal v neck tee. Anything but basic!



Tory Burch



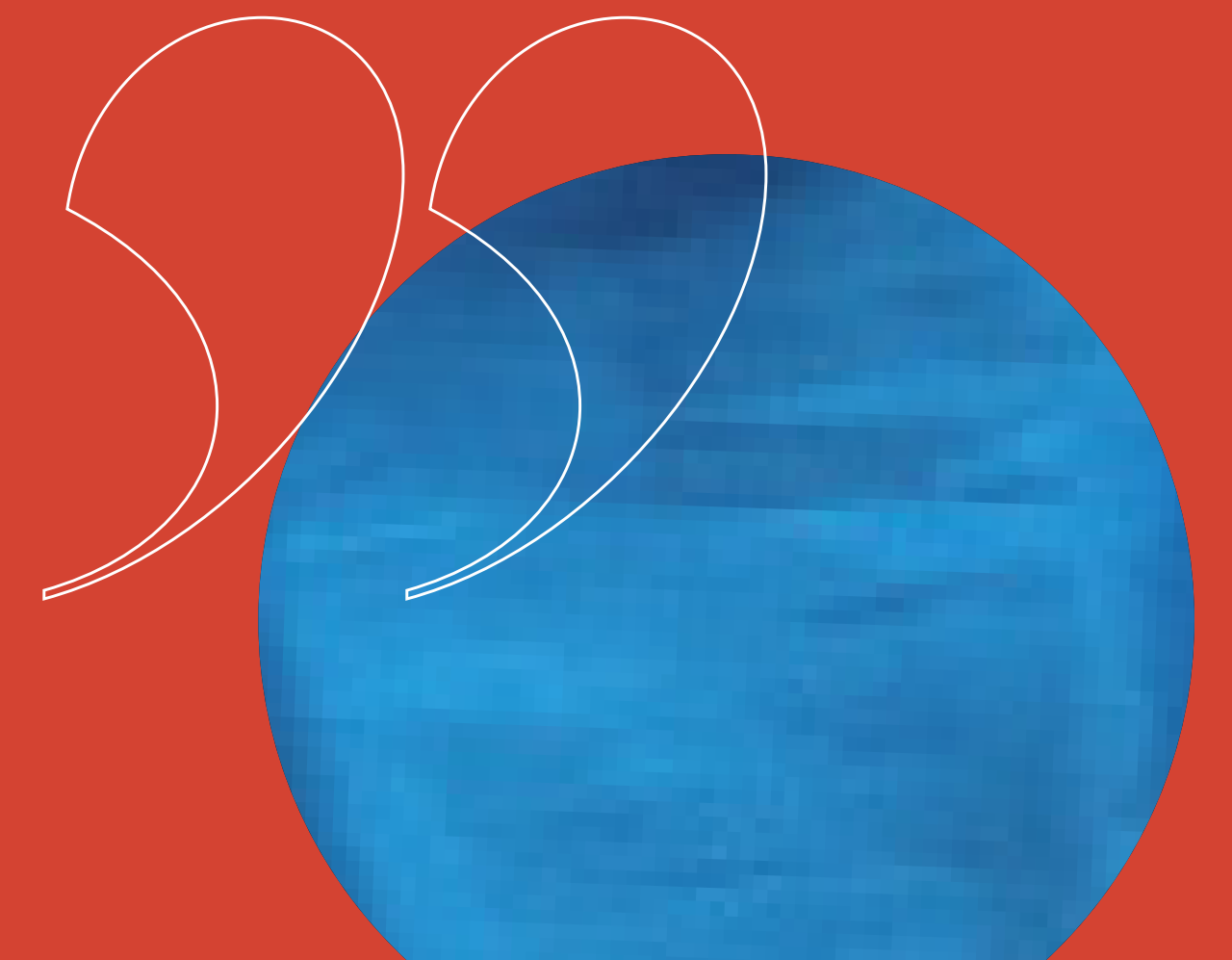
Alice + Olivia



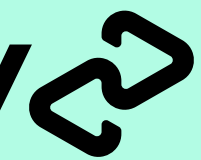
The SKIMS Effect

“ Following the success of Kim Kardashian’s multi-million dollar shapewear company, SKIMS, and the public’s desire to shed their bulky layers, bodycon styles are back in as Afterpay sales are already up 25% YoY. Sandy Liang and Alice + Olivia showcased lingerie as outerwear throughout New York Fashion Week.

As the SKIMS effect continues to take hold amongst designers, consumers will try to emulate these looks by wearing shapewear as outerwear - which is currently up 63% YoY on Afterpay.



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1. Figures as of March 31, 2022. 2. Vogue, Marc Jacobs's Grunge Collection for Perry Ellis Is Back! See Every Look | Vogue, 2018 . Imagery and licenses purchased from Getty and Unsplash.