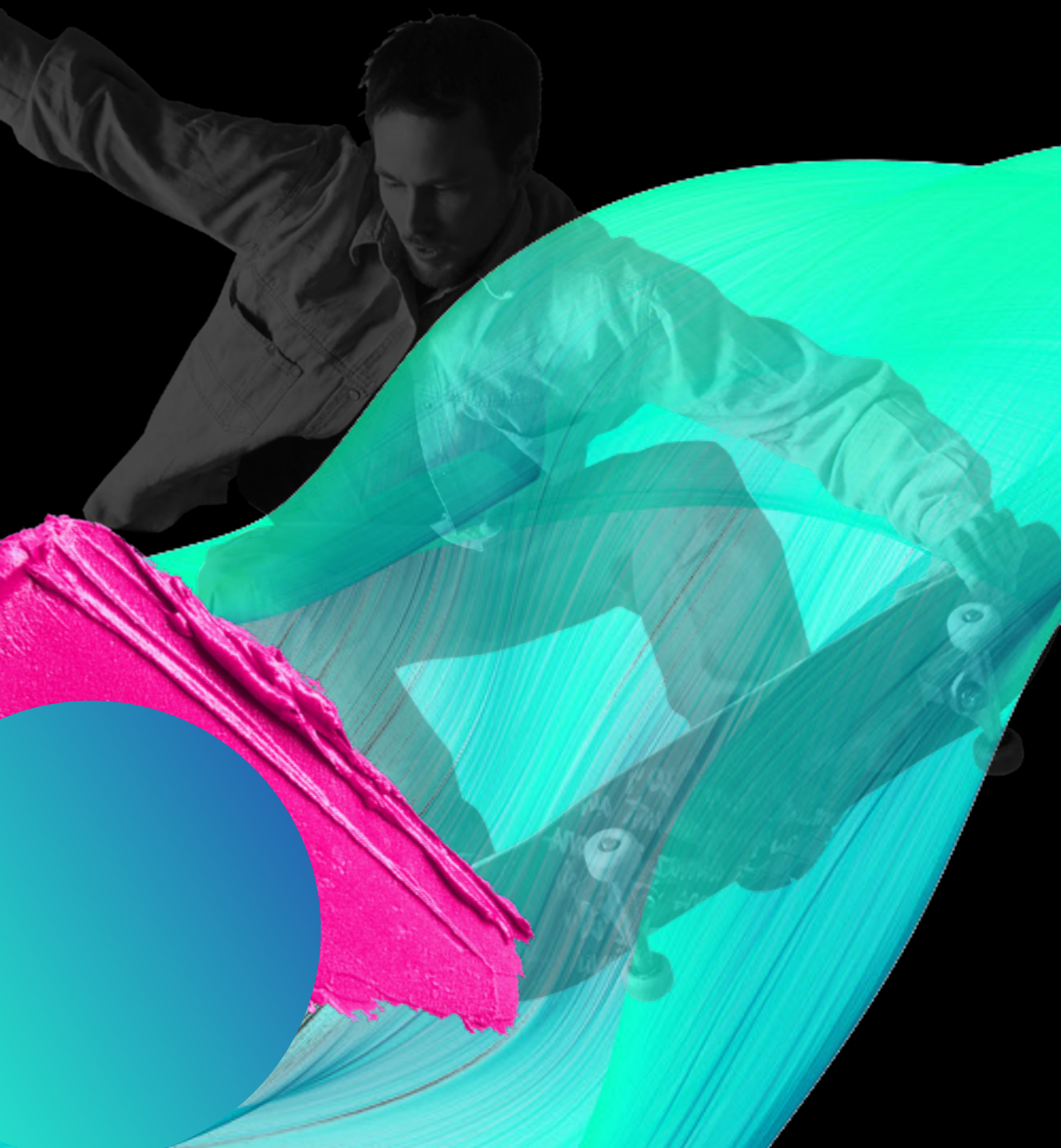
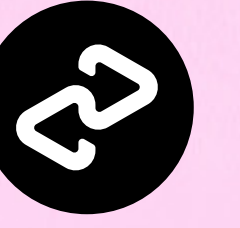


afterpay



The 2022 Spring Summer Global Trend Report





About the Report

We have aggregated recent purchases made by our global customer base of over 19 million, across our catalog of 122,000+ brands and retailers, to identify the season's key trends and shopping patterns.

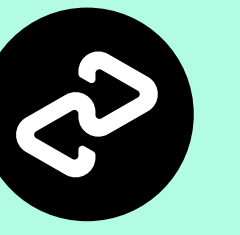
What sets our report apart is our use of real-time customer purchase data looking into sales, coupled with the fact that an overwhelming majority of Afterpay users are categorized as **Millennials and Gen Z**, the world's highest-value and most powerful demographic.

Let's take a deeper look at the trends and purchasing behaviors taking over this spring and summer >>

For more information

Check out Afterpay's full company overview and [fast facts here](#).





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.





Contents

REGIONAL TRENDS:

North America

Welcome to the North America section of the Global Trend Report, where we take a closer look at what Americans and Canadians are shopping for this season.

As the weather warms up and we look towards the new normal, consumers have a few very specific trends top of mind.

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

-  **Fashion**
-  **Beauty**
-  **The New Athleisure**
-  **Lifestyle Hits & Misses**
-  **The IT List**
-  **Up & Coming Trends**

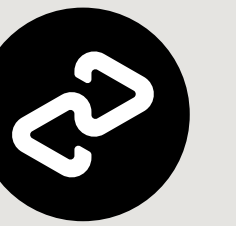


Wedding Season Is Back On

After two-years of postponed or canceled events, wedding season is back on in full force. With roughly 2.5 million couples expected to tie the knot this year,¹ consumers are preparing for the busy season by Afterpay-ing the perfect semi-formal attire with quarterly sales for heels up +18% in the US and +67% in CA already, while midi and maxi dresses were up +45% and +56%, respectively. These styles include figure hugging silhouettes, waist-cutouts, and lacy fabrics - all pointing back to the sexy dressing trend.



NBD



Fashion



Fashion



Song of Style

The New Business Casual

With office spaces reopening nationwide, consumers are avidly shopping for workwear options. Gen Zs, who entered the workforce in a virtual world, are combining the comforts of loungewear with the relaxed, oversized shapes of streetwear. The new work wardrobe will include neutral sneakers and looser, wide leg fits. Afterpay sales for plisse items were already up +14% YoY in the US.



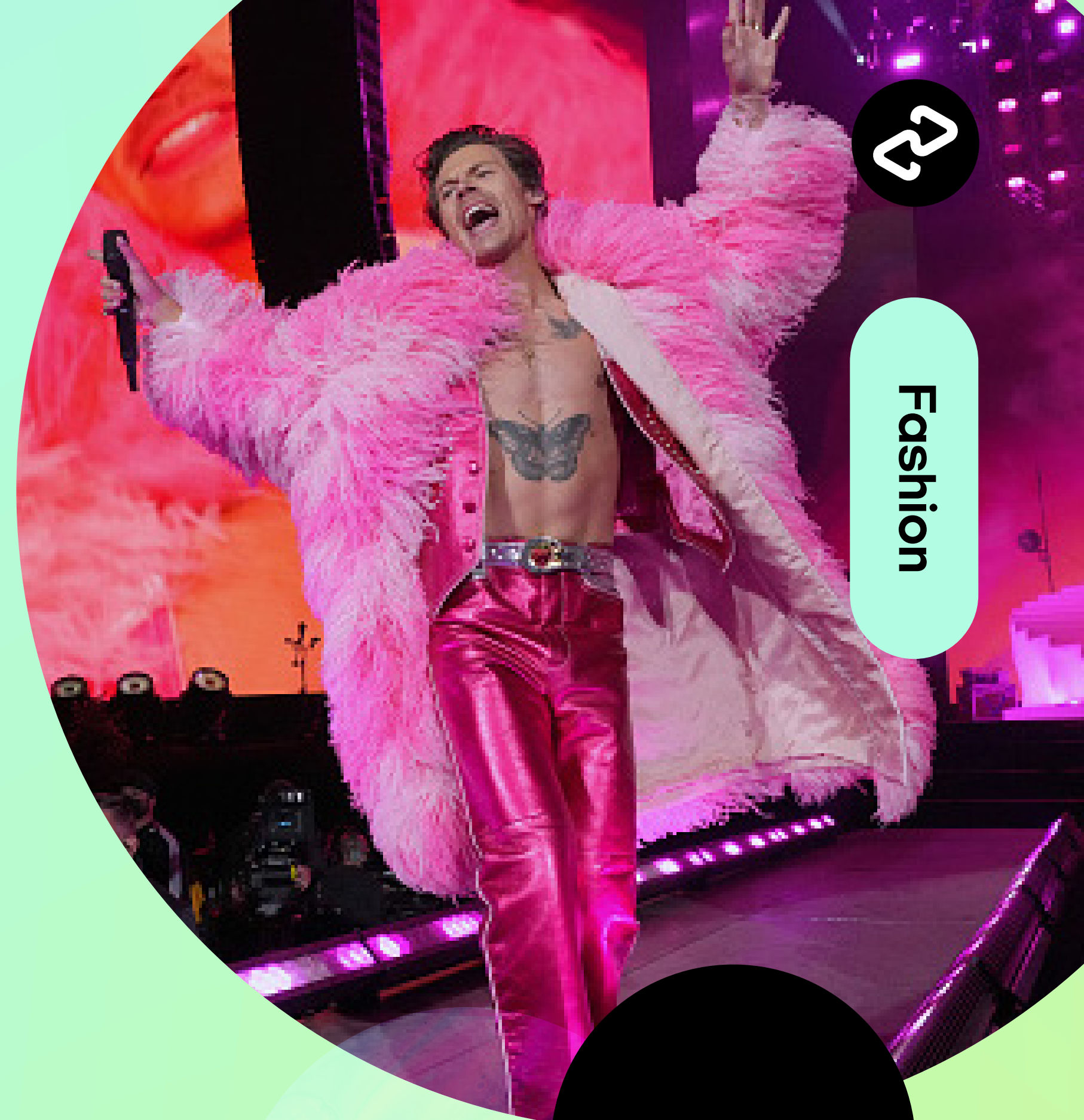
Boohoo

A Psychedelic Timewarp

While it's no surprise that Y2K is the most popular decade at the moment, nostalgia is also playing out in different iterations of 60s and 70s fashion. Celebrity inspiration from Harry Styles to teasers of Tom Holland in *The Crowded Room* are sustaining these decades' staying power in the modern-day era. Over the past six months, Afterpay shoppers leaned hard on floral prints - quarterly sales up +26% in the US and +64% in CA, with daisy prints predominantly used in the form of crochet tops, abstract printed dresses and matching sets. Other plays on the 60s and 70s have been represented in an uptick of clogs and wide leg denim.



ASOS



Fashion



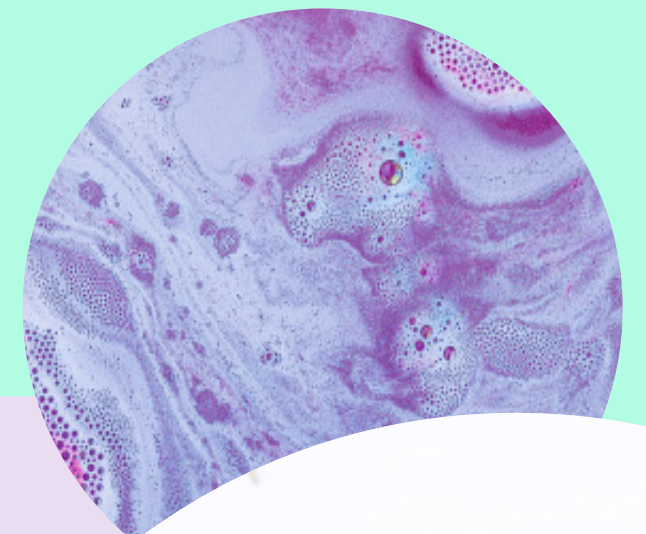
An Emphasis On Scalp Care

Thanks to a few viral TikToks, scalp care education is having a moment as more consumers learn about its importance to overall hair health. The Olaplex range continues to rank as one of the most beloved hair care products, with the No.4 shampoo and No.5 conditioner on Afterpay's top purchased list. US shoppers are showing a particular interest in scalp tools with sales for shampoo massage brushes selling out at an astounding +381% since last year.

SHEIN

Studies show that a good hair day can positively impact your mental health, and with the passing of laws like California's CROWN Act, consumers feel a liberation to express themselves however they choose.

Shakaila Forbes-Bell,
Afterpay's in-house Fashion Psychologist





Megan Fox



Summer of Music

Coachella kicks off the return of music festivals and the highly-anticipated festival fashion trends of the year. À la Megan Fox, orange eyeliner and eyeshadow will make an appearance, especially as US sales for these colored items are already up 18%+ YoY. Consumers have been eagerly preparing for a refreshed summer hairstyle as they Afterpay semi-permanent hair color in vibrant shades of rose pink and red, which are up +28% in quarterly sales.



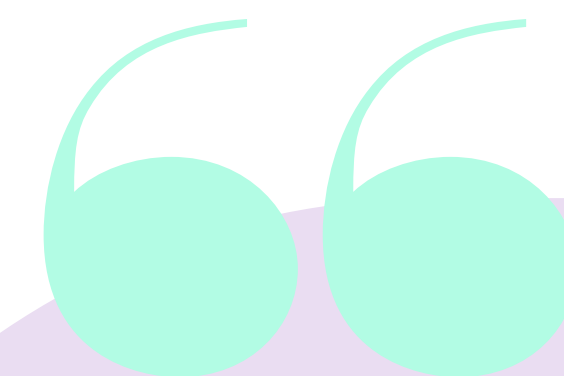
Pau
Dictado

Beauty



All That Glitters Is Not Gold

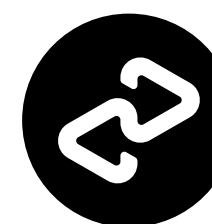
HBO's *Euphoria* has redefined character storytelling through the power of makeup - inspiring fans of the show to experiment with makeup in a bolder way this spring and summer. Gen Z and Millennials are donning more messy glitter eyeshadow via wet application for going out and music events. In anticipation for the season two premiere and since the show ended, US sales for face gems have seen a big growth of +87% QoQ.



While travel restrictions are easing, studies show that people are still seeking escapism through their favorite shows by emulating makeup looks as a form of creativity and self-expression.

Shakaila Forbes-Bell,
Afterpay's in-house
Fashion Psychologist

Desi Perkins



Beauty



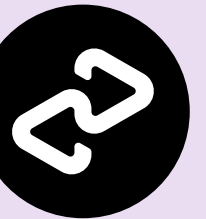
The New Athleisure

Tenniscore

Over the past two-years, tennis has been picked up by the millions² as a fun socially distanced sport - inspiring fashion trends on and off the court. An aesthetic that combines athleisure and preppy styles, tenniscore has reinterpreted the sport's traditional uniform, which consumers have quickly adopted into their everyday looks. US sales for tennis skirts, matching sets and biker shorts were up +16% YoY. Canadians are also making their foray into tenniscore, with polos as the top-selling item by an astounding +192% YoY.



Francis Lola



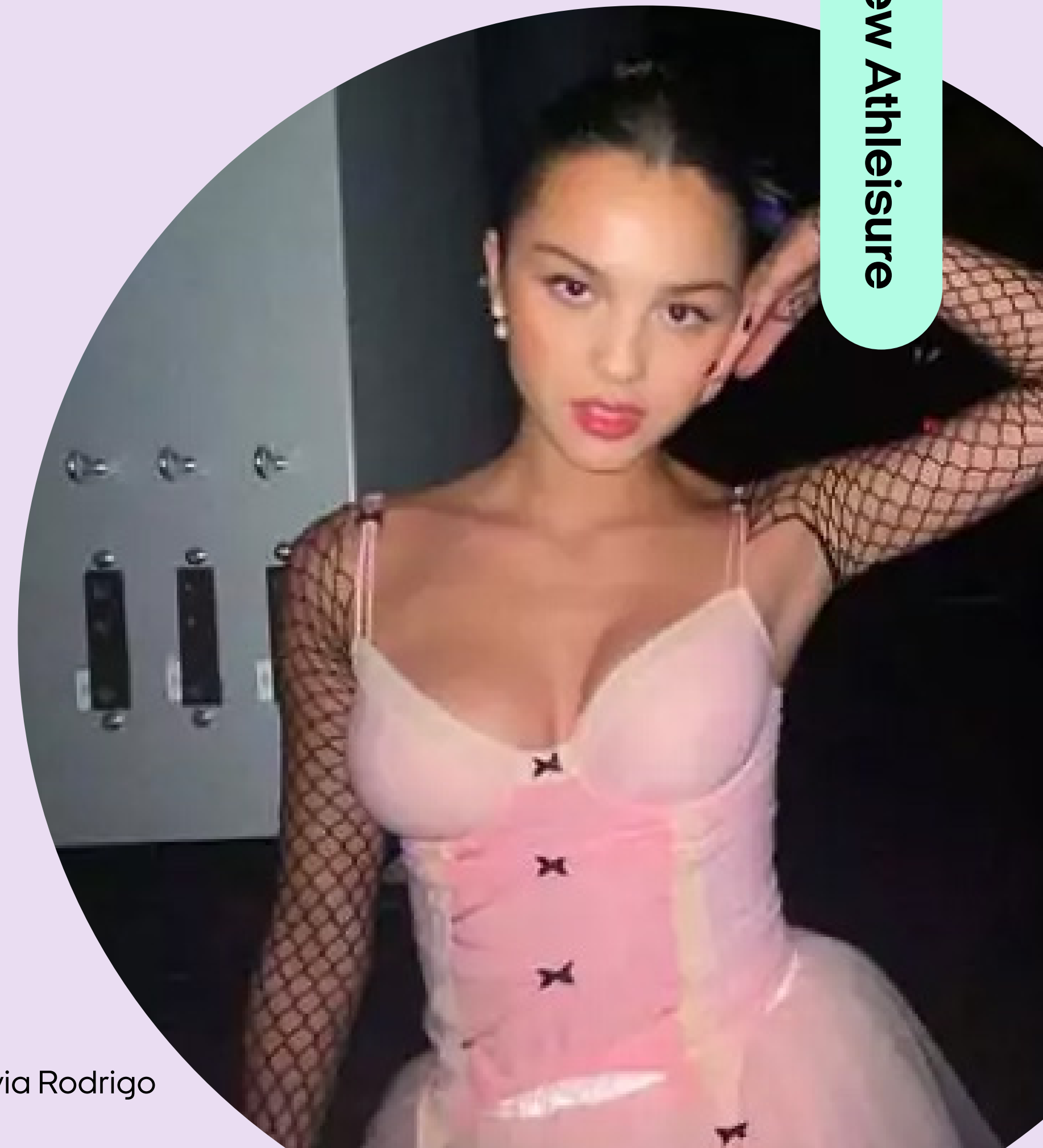
The New Athleisure

Balletcore

Another take on athleisure, balletcore bubbled up from TikTok as the latest Gen Z trend. By combining comfort and elegance, ballet-inspired outfits are making their way into the mainstream. Think wrap styles in the form of adjustable crop tops and skirts. The traditional tutu is also getting a makeover through tulle and feather dresses. US sales for these items were up +85% YoY as special occasion events like prom and weddings return.



Anya Taylor-Joy



Olivia Rodrigo



SK8 Culture

From skateboards to snowboards to roller skates, sk8 culture embodies both individuality and risk - clearly seen in today's fashion through streetwear. As a genderless trend, men and women are adopting the same styles in the form of baggier clothing such as oversized jackets and looser fitting pants. In the US, items described as 'unisex' were up +154% YoY - indicating demand as we head into spring and summer.



The New Athleisure

What are the items consumers are leaning into and what are they giving up this upcoming season?

Based on Afterpay consumer shopping data analyzing quarter-over-quarter sales.

Hits



Wallpaper



Camping chairs



Beach towels



Airpods



Candles

Misses



Coffee makers



Air fryers




Croc pots



Desk chairs



Lifestyle Hits & Misses

A photograph of two lit candles on a wooden tray. One is a tall, cylindrical candle and the other is a shorter, wider, bowl-shaped candle. They are both lit, with bright yellow flames. The tray is made of light-colored wood and sits on a white, wrinkled fabric surface. In the background, there are more white fabric items, possibly pillows or blankets, creating a cozy, minimalist aesthetic.

Shakaila Forbes-Bell, resident fashion psychologist at Afterpay, says that candles have a way of bringing back memories.



By targeting brain areas like the limbic system and other regions associated with emotion and memory, scents from fragrances or candles have the power to transport you to your dream destination, whether it's a roaring fire in Vermont or a tropical beach in Bali. Through the power of smell, shoppers have the ability to take themselves out of their home office and into their dream spot.



Lifestyle Hits & Misses

What were the runway trends seen during the recent fashion shows that are already trickling down to the mass market?

Pink



Steve Madden



Valentino

Valentino's recent runway show was a nod to old Hollywood highlighting pink in various eye-catching looks. This romantic shade will be stocked everywhere as consumers will be aching to wear pinks as the weather warms up.

Zanna Roberts Rassi, Afterpay Brand Ambassador



The IT List



Altuzarra

Crochet

Obsession with the 70s has not waned in designer looks as seen through Altuzarra's incredible FW22 crochet dress. In the coming months, we expect festival and vacation-goers to adorn more crochet.

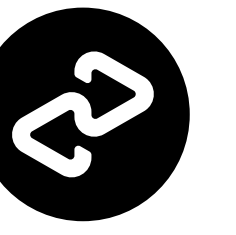
Zanna Roberts Rassi, Afterpay Brand Ambassador



Free People



The IT List



Pleats



Pleated fabrics added an element of movement on the runways in February, challenging designers to make fabrics like leather more pliable. With workers returning back into the office, we anticipate these items to be seen in more business-casual outfits.

Zanna Roberts Rassi, Afterpay Brand Ambassador



Brandon Maxwell



Alice + Olivia at Revolve

Sexy Dressing

“Cut-outs were everywhere on the runway - one look at Echaus Latta’s show will sum up this sexy dressing trend is here to stay. As people prepare for warmer weather, they’ll incorporate more daring looks into their summer wardrobe like this Revolve dress.”

Zanna Roberts Rassi, Afterpay Brand Ambassador

Ekhaus Latta

Hours at Revolve

The IT List



Tailored looks

Gabriela
Hearst



The IT List



After two-years of comfort dressing, tailored and structured looks like pantsuits and blazers are making a comeback as we saw at the Gabriela Hearst show. Shoppers are going to want to spice up their day to night wardrobe with trousers similar to these from Princess Polly.

Zanna Roberts Rassi, Afterpay Brand Ambassador



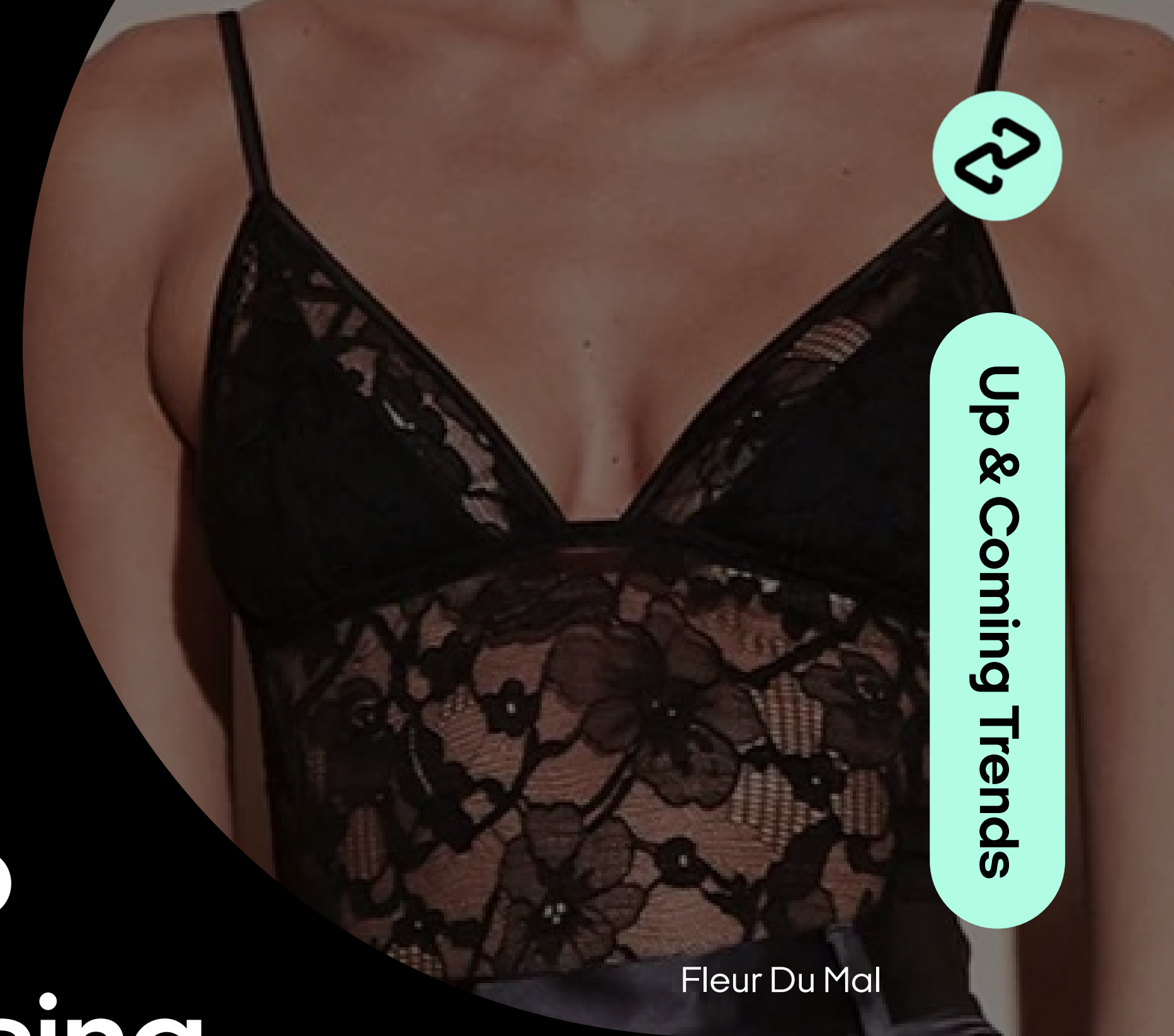
Princess Polly

Looking beyond the spring and summer seasons, here are the trends to keep an eye out for year-round.

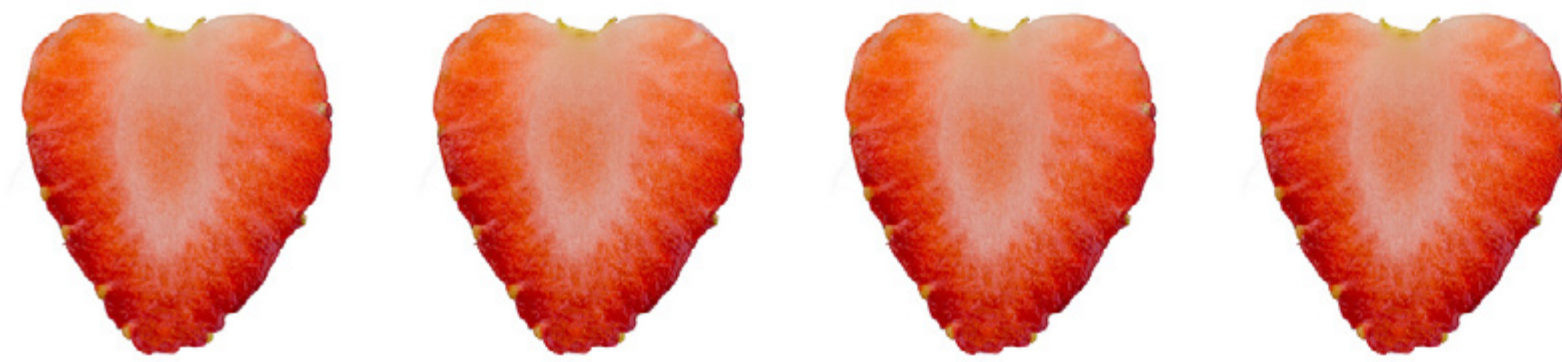


From Sexy to Naked Dressing

As a result of being cooped up indoors, the sexy dressing trend that bubbled up at the start of the pandemic is evolving into 'barely there' clothing. Sexier clothing items with cut outs were already selling out +34% earlier this year in the US. Lingerie is also one of the most purchased products for Canadians. Thanks to Bad Gal RiRi, lingerie styles have started to creep into more categories, with lace swimsuits currently ranking as one of the most popular styles in swim.

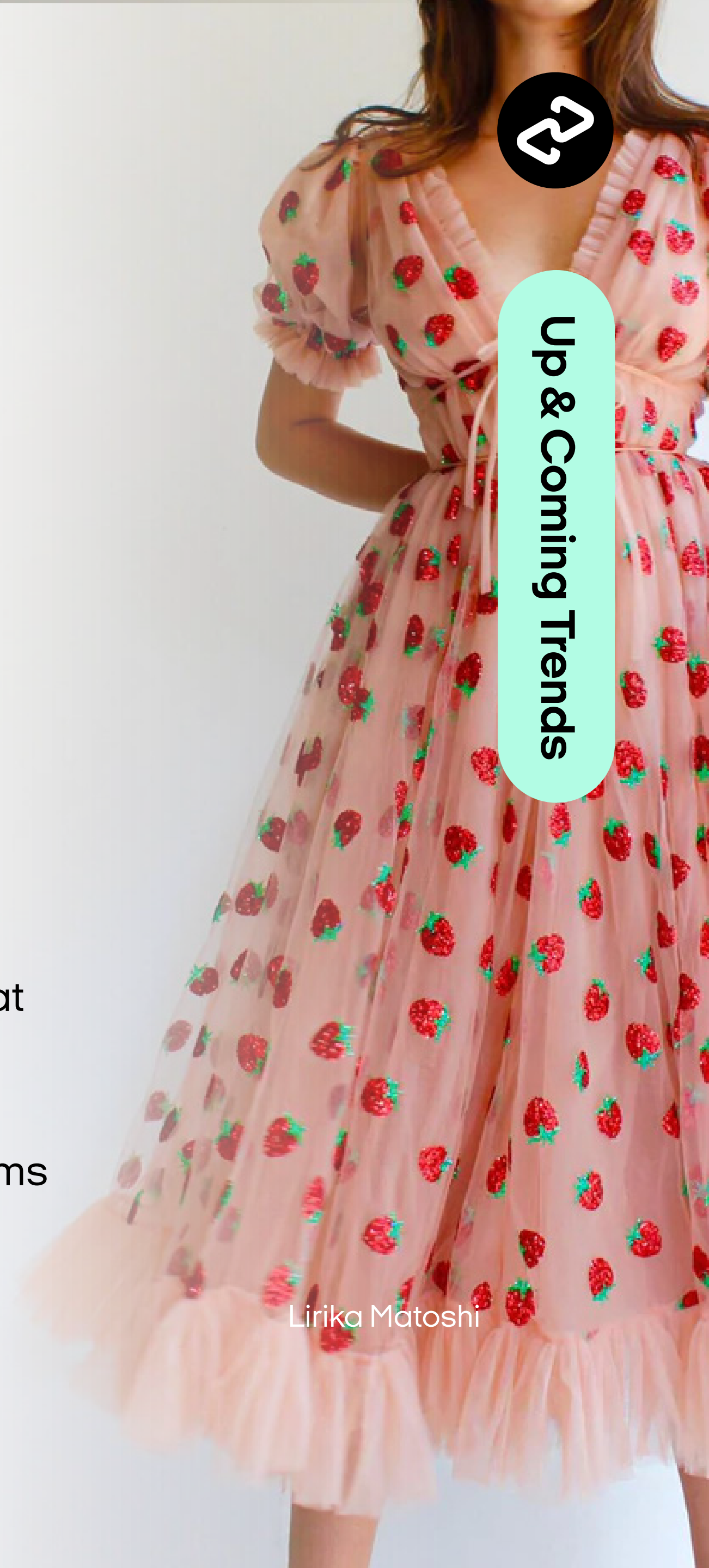


Up & Coming Trends



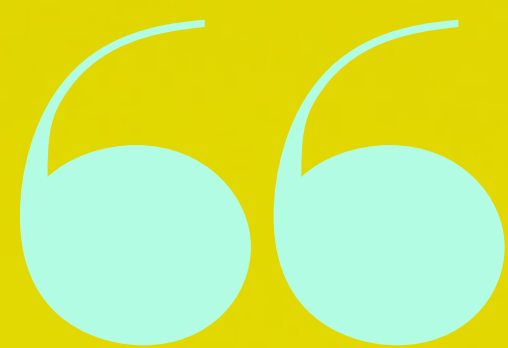
The Confidence Boost in Serotonin Dressing

An update to the ever-present dopamine dressing, serotonin dressing is emerging as a more risqué version as consumers seek clothing options that boost their self-confidence. People are shopping for unconventional prints to embody this trend, with leopard, strawberry and heart shaped patterns topping the most purchased list. Expect to see more strawberry printed items throughout the year as sales are currently growing +95% YoY in Canada.



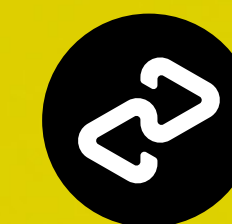
Up & Coming Trends

Lirika Matoshi



While dopamine dressing has remained a fun way to incorporate color into your wardrobe, a global survey investigating the mood-altering effects of clothing revealed that clothes don't simply make people feel good. 42%³ of respondents believed that certain outfit choices made them feel more relaxed and thus more confident. When we wear these types of outfits, they foster the release of Gamma Aminobutyric Acid or 'GABA' neurotransmitters in the brain that produce a calming and relaxing effect on the body - what I've labeled as 'GABA dressing'.

Shakaila Forbes-Bell,
Afterpay's in-house Fashion Psychologist





¹ NPR and The Wedding Report

² Physical Activity Council 2021 Study

³ Source: Young, S [2019]. Women choose outfits based on how clothes make them feel while men care more about what others think. The Independent. Retrieved 19 April 2022.

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