

Lingerie Trends Mini Report

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INTRODUCTION

This mini-report aims to introduce the reader to the current opportunities in the UK and European lingerie markets, as well as introducing the key players and future trends.



Image courtesy of Marks and Spencer

THE CURRENT MARKET

The lingerie market, like most fashion markets, is feeling the impact of the credit crunch and global recession. According to Mintel's UK underwear Retailing Report 2009, most customers plan on spending less on lingerie in the near future, because of their economic situations. Where does that leave lingerie brands and retailers? Product innovation, inventive retailing strategies, and original marketing techniques are key to survival in this market. This report will introduce some key players in the current lingerie market, and explore why they are successful. We will then look at opportunities within product development, retailing, and marketing strategies of lingerie, and how brands can innovate and find points of differentiation in the difficult trading environment.



Image courtesy of Armani

BRAND PROFILES: MARKS AND SPENCER

The brands listed here are not based on market share, but have been selected based on their influence in the lingerie market. These brands are winners in different areas, market share, price point, value, branding, or innovative retailing and branding.

Marks and Spencer

Brand History

M&S is a major British retailer, with over 840 stores in more than 30 countries around the world; over 600 domestic and 285 international. It is the largest clothing retailer in the UK and as of 2008, the 43rd largest retailer in the world.

Product

A wide variety of products and collections including plus sized, shapewear, post surgery and more. Their collections include basics, glamorous, feminine and fun, however their best sellers continue to be cotton bras and briefs.

Consumer

Core customers are the over 40s market however there is an increasing appeal among 25-34 year olds, as M&S becomes more fashion and trend led.



Image courtesy of Marks and Spencer

BRAND PROFILES: MARKS AND SPENCER

Retailing

M&S has become increasingly price-competitive with its 'outstanding value' ranges and multi packs whilst not neglecting quality and also providing collections such as *Autograph* with premium fabrics and sophisticated styling.

Promotion and Marketing

M&S uses media coverage such as television, magazine and newspaper adverts. They have also collaborated with designers such as Joseph Corre the designer behind Agent Provocateur and Zandra Rhodes.

USP

M&S continues to stand out for high quality durable lingerie with a reasonable price point. Now that they are focusing more on fashion and incorporating this into their designs they are widening their target market.



Photo by Katie Pitman

BRAND PROFILES: AGENT PROVOCATEUR

Brand History

Founded in 1994 by Joseph Corr  (son of Vivienne Westwood) and Serena Rees, Agent Provocateur has become a phenomenal success with the opening of stores within the UK, America, Middle East, Russia, Hong Kong and Europe; over 40 worldwide.

Product

Products range from lingerie to corsetry, which are all intricately designed using high quality fabrics and innovative ideas that aren't just based on current trends.

Consumer

Target market includes 25 – 50 year old women who are feminine, fun, sexy and confident.



Image courtesy of Agent Provocateur

BRAND PROFILES: AGENT PROVOCATEUR

Retailing

The stores are boudoir style decorated emporiums with glamorous shop assistants providing great customer service.

Promotion and Marketing

Creative communication using shop windows, cinema advertising, catalogues and events all attract massive national and international media coverage which gives the brand it's outrageous reputation.

USP

Differentiation from any other lingerie brands due to the design and originality of the lingerie and branding strategy.



Image courtesy of Agent Provocateur

BRAND PROFILES: PRIMARK

Brand History

First store opened in Dublin in 1969 and there are now 136 stores in the UK and a few across Europe.

Product

Primark has a comprehensive choice of underwear across fashion and colour styles, and is expanding to include sexier styles, bigger cup sizes and more co-ordinates. They also produce cheap multi-packs of basic briefs and bras.

Consumer

Primark has a broad consumer base although the appeal is stronger among young teens and 20s. Primark shoppers do not appear enthusiastic about purchasing underwear, are money conscious and are the most likely to mainly buy multi-packs.



Photo by Katie Pitman

BRAND PROFILES: PRIMARK

Retailing

Visual merchandising expenditure is kept to a minimum in order to offer such cheap prices. Although looking throughout the store there appears to be a lot of merchandise this is due to the fact that there are the same styles in many different sizes and colours rather than a wide variety of designs.

Promotion and Marketing

Primark highlights its reduced VAT pricing by using signage on stands and relies on their reputation to provide cheap fun underwear to sell merchandise, as they do not advertise.

USP

Fashion inspired lingerie that is cheap - quality is not very important to Primark shoppers.



Photo by Katie Pitman

BRAND PROFILES: CALVIN KLEIN

Brand History

Calvin Klein Underwear for men was formed in 1982 and women's lingerie followed in 1983. In the UK there are now 7 CK underwear shops and 300 stockists ranging from House of Fraser to ASOS.

Product

Collections include comfortable basics as well as fashion forward lingerie. This autumn there will be the launch of Calvin Klein Black for women, a more luxurious collection.

Consumer

They have a broad market appeal from 14 to 50 year old women who want modern, designer, comfortable, sexy lingerie.



Image courtesy of Calvin Klein

BRAND PROFILES: CALVIN KLEIN

Retailing

Stores are simple, clear and minimalist with neatly packaged boxes stacked on shelves and colour coordinated displays.

Promotion and Marketing

Billboards and magazine adverts are becoming more provocative and sexy, and Kate Moss, Natalia Vodianova and Eva Mendes have all been the face of the company.

USP

CK focuses on exceptional fit and quality. The fits and fabrications are developed to perfection to preserve the brand's standard of excellence.



Photo by Katie Pitman

BRAND PROFILES: ELLE MACPHERSON

Brand History

Founded in 1990 in Australia, in 2001 the brand was brought to Britain where it has become a huge success. Elle is not just an endorsement of the brand but is involved in the designs too.

Product

Collections include a luxurious basics range and a more expensive black-label collection featuring more intricate detail and design.

Consumer

Consumers range from 18 years upwards who like feminine flirty lingerie.



Image courtesy of Elle MacPherson

BRAND PROFILES: ELLE MACPHERSON

Retailing

There are currently no own stores in the UK and are sold in department stores including Harvey Nichols, Fenwicks, Harrods, House of Fraser and Liberty and online at ASOS, Figleaves and Net-a-porter.

Promotion and Marketing

Campaigns are provocative, sexy and feature intimate photos open to interpretation. One advert that featured in Vogue was banned as a member of the public contacted the Advertising Standards Authority (ASA) and complained it was offensive.

USP

Intricately designed, pretty feminine lingerie reasonably priced.



Image courtesy of Elle MacPherson

BRAND PROFILES: SPANX

Brand History

SPANX, Inc. is a U.S. company which mainly focuses on "body shaping" undergarments designed to give the wearer a slim and shapely appearance. About 5.4 million SPANX power panties have been sold since the year 2000.

Product

Shapewear is their speciality, which includes briefs, slips, camis and body suits all designed to give a slim appearance under clothes.

Consumer

Women aged 20 years and upwards who want body confidence, inch loss or a smoother silhouette.

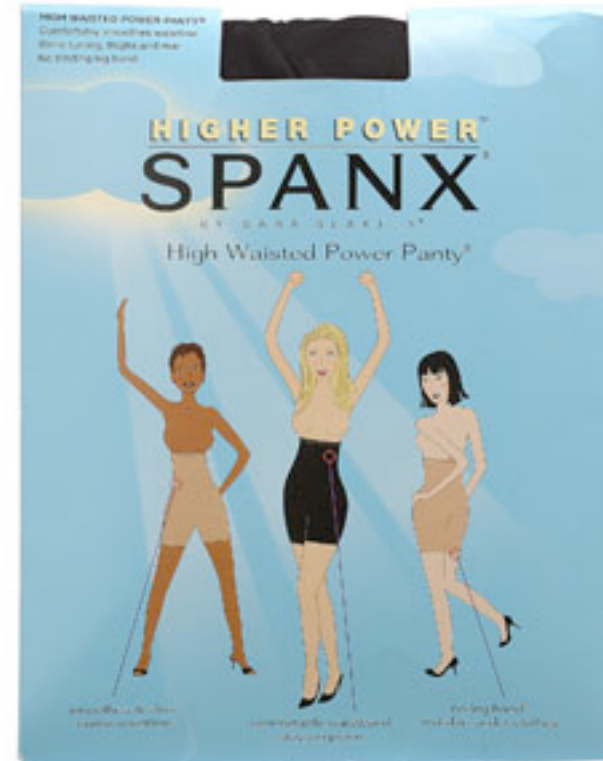


Image courtesy of Spanx

BRAND PROFILES: SPANX

Retailing

Sold in department stores including Liberty and online at Figleaves. They have yet to open their own store in the UK.

Promotion and Marketing

Sold in slim boxes, packaging is colourful and features a sketch with the benefits of the product pointed out.

USP

Shapewear to slim and shape the figure and give a more hourglass silhouette. The company's products are marketed to fit contemporary female lifestyles and fashion trends.



Image courtesy of Spanx

BRAND PROFILES: LA SENZA

Brand History

La Senza Corporation is a major Canadian retailer. The first store opened in 1990 and is the winner of Drapers Awards 2008 lingerie retailer of the year.

Product

Wide variety of products in many different styles from fun to glamorous underwear. There is also a younger range for 7 to 14 year old girls.

Consumer

Teenagers and young women primarily appealing to 15 – 30 year olds.



Photo by Katie Pitman

BRAND PROFILES: LA SENZA

Retailing

La Senza have invested in their store environments and their new shop fits are eye-catching pink and black boutique-style shops.

Promotion and Marketing

Volume discount offers and special offers. Double-decker 'Bra Fitting Bus' bus visits various shopping centres to encourage women to be professionally bra fitted.

USP

Young fashionable lingerie sold at reasonable prices and frequent promotional discounts and offers.



Image courtesy of La Senza

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OPPORTUNITIES PRODUCT

The lingerie market offers a great deal of variety in both product and design, however some areas lack choice for consumers. Shapewear, sports bras, large cup sizes, maternity lingerie and eco or ethical fashion products are areas that lack product and innovation.

Shapewear

The shapewear market is growing and few lingerie brands have created strong products in this category. Specialist shapewear brands, such as Spanx or Flexees by Maidenform, have had great success with their product, but lack design and innovation for the consumer who seeks a fashionable or sexy shapewear product. Brands such as Marks and Spencer and La Senza have developed their own successful shapewear ranges, but few offer a wide range of fashion-led shapewear products.

The customers for shapewear are a mixed group, this is not a product simply targeting an older, larger woman, in fact, there are many younger women who wear shapewear on a frequent basis. Solutions are sought by a varied market, and brands should consider the fashion element when designing shapewear.

Rather than focussing on the older consumer who buys shapewear only for its functional purpose, brands should look at the younger and fashion-led consumers who want shapewear as a solution, but also want an attractive product. High-waisted panties, waist shapers, shaping camisoles, full and half slips, and control top hosiery can all be designed with a fashion element: colours, print, lace trim, and jacquards can add interest to an otherwise dull product. Brands should also consider the benefits of offering a full range of support, from light control, for everyday wear, to firmer control, for use with occasion wear.

OPPORTUNITIES PRODUCT

Sports Bras

The market for sports bras is also lacking in innovation. The market is dominated by major lingerie retailers (Marks and Spencer) and sportswear brands (Nike, Adidas) and lacks a trend-driven product. The sportswear market is dominated by functionality, however the performance sportswear market has recently introduced more fashion-led products, Adidas by Stella McCartney is a good example of this. The upcoming London 2012 Summer Olympics will promote an increase in interest of sports, particularly in the UK market, which will lead to an increase in sportswear sales. Sports bras generally lack innovation and trend-driven design, but brands wishing to enter this market must consider the fit and function, as this will generally be the most important aspect of any sports bra.

There is also a market of consumers who regularly visit gyms, but keep their activity to a minimum, and usually do not need the same function as professionals or semi-professionals. Matching sets and fashion-driven sports bras can appeal to these gym-goers, who care about their appearance while they are exercising. There is also the potential for sports bras to be used as everyday products, with some consumers concerned about fit and adopting a “sporty” look when it comes to personal style. Marketing for this type of product should be well-considered, carefully distinguishing the market who cares about performance (see Nike Balance Sports Bra) and the consumer who wears sportswear everyday and is driven by fashion (see Adidas Originals collections.)

OPPORTUNITIES PRODUCT

Large Cup Sizes

There are currently a great deal of brands who offer wide size ranges, and brands who specialize in larger cup sizes, however this market has yet to be fully catered to. Most large cup size brands target a middle aged consumer, with few brands dedicating ranges to a young, fashion-conscious woman. Bravissimo, La Senza, Freya, and Marks and Spencer all have ranges for this group, but competition is scarce, and there is great potential for brands to create a fashion-led lingerie collection, in line with current trends, or a “sexy” offering, that is marketed directly at an 18-30 year old market. This group do not want to buy the same product as the older generation, so promotion is key: the language and imagery must be targeted at this market exclusively. The product must also include a variety of small back sizes, as this group tend to need 28-32 size backs, with cups ranging from D cup to F cups.



Image courtesy of Bravissimo

OPPORTUNITIES PRODUCT

Maternity Lingerie

The maternity and nursing bra market is also an area of opportunity, lacking design innovation. Research shows that expectant and young mothers struggle to find attractive bras and lingerie sets. Although this market is small, there is great potential here, as product is limited, and women are willing to spend extra on products that will help to lift their confidence.

Eco and Ethical Lingerie

Eco and ethical fashion has seen a slow in growth since the recession, however this is a sector that will continue to attract a growing customer base. Brands may find it challenging to create entirely organic or fairtrade products (due to the complicated supply chain) however any efforts to reduce carbon emissions, use organic materials, and source responsibility will be noticed by consumers, if they are marketed correctly. Marks and Spencer's Plan A is a great example of an ethical policy, however brands can implement smaller strategies and still attract an ethically minded consumer, who generally has little choice, particularly in the lingerie sector. Stella McCartney's lingerie range is a good example of this. Transparency is key in this sector, make sure to be honest and clear about your brand's ethical actions.



Image courtesy of Stella McCartney

OPPORTUNITIES RETAILING

Online Retailing - Own brand

E-tailing is one of the few channels that is seeing growth, and brands should explore how they can profit from their own online store. Design and ease of navigation is very important, a good design will generally result in higher sales. Other important factors are user-contributed content, in the form of feedback and forums. Allowing the customer to vocalize their thoughts on a product and brand is very beneficial, and can add credibility to the brand and product discussed, even when it is negative. Brands should use their user-contributed content as market research, listen, and action feedback where appropriate.

Online Retailing – Multi brand sites

Multi brand sites seldom compete with an own-brand online store, instead, the sales of smaller brands on a large e-tailing site often give the smaller brand credibility, and strengthens brand awareness. Figleaves.com is a prime example of a successful online lingerie retailer, but smaller ones or non-specialist sites (Asos.com) are also legitimate channels for any lingerie brand. Working with a large e-tailer can also be an opportunity for smaller brands to better understand the e-tailing market, before trading from their own site.



Image courtesy of Figleaves

OPPORTUNITIES MARKETING

Online Marketing: social networking

Online marketing and the use of social networking sites is often confusing for fashion retailers, many have failed to utilize this important media channel to their own advantage. In order to approach this form of media, brands should carefully choose their platforms, as new ones may not last long. Instead brands should focus on formulas that are tried and tested, for example it is not too late to get onto Twitter or Facebook.

Zia Zareem-Slade, Head of Experience Planning at EMC Conchango, explains that “the most effective strategy any brand can have is a media neutral one. With a social media landscape that is constantly changing, this is an invaluable strategy as it allows you to consider new social media sites or tools as and when they appear, and assess if you can apply your experience principles within them... start participating in the communities within which your audience dwells so you can see for yourself what sorts of things go on there.”

OPPORTUNITIES MARKETING

Videos and Clips

The recent release of several high profile video campaigns (for example, Miss Dior with Marion Cotillard) has resulted in many brands attempting to create promotional videos in order to strengthen brand perception. A successful clip can lead to increased brand awareness, if the clip is marketed correctly, (usually through Youtube, and with a promotional campaign to accompany the launch), however, brands should choose their team and story carefully. A weak concept does nothing for the brand, and can be very costly. Also, brands should be careful of replacing traditional promotional campaign, with the production of a “video.” In some cases, this can be an inexpensive way to launch a collection or product, but in most cases, brands should be wary of radically changing their promotional strategies without testing the market first.

Celebrity Endorsement

Although celebrity endorsement is a trend that seems to be decreasing, this is still an effective way for brands to generate credibility and media exposure. The choice of celebrity needs to be on-brand, and using someone as a face of the brands, rather than a designer, can be just as effective. Like with any alliance, celebrities need to be chosen carefully and risk assessment must be considered.

FUTURE TRENDS

The following six pages present some key lingerie trends for Spring Summer 2010.

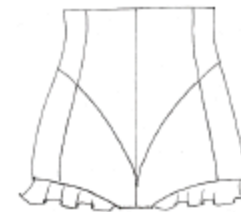
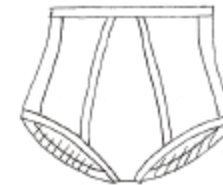
© Alexandra Suhner Isenberg 2009

Waists Are High

High waists have slowly begun to dominate lingerie fashion styles, and are very important for seasons to come.

Used as a control option (especially in shapewear) or as a vintage look, high waisted panties also work with the season's fashion trends, which require form fitting underwear with an emphasis on the waist.

Use lines to create structure on the pieces and to slim the form

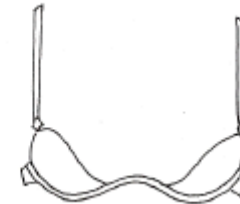
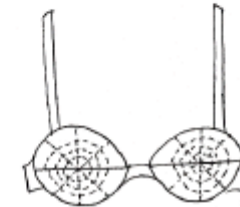


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Fantastic Cups

Designer should consider innovative cup design for bras.

New shapes and interesting cut-outs will be important, as well as layering, the use of unusual trims, and a play on fabrics.



© Alexandra Suhner Isenberg 2009

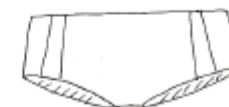
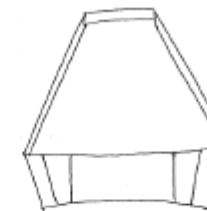
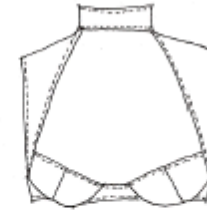
Power Statements

The Power Statement trend is more about the attitude of the lingerie.

Strong shapes, inspired by a dominatrix theme, but less dramatic, will be important in lingerie.

Shapes include suspender belts, corsets, and waspies are important here.

Black is the key colour.



© Alexandra Suhner Isenberg 2009

Venetian Costume Party

The Venetian Costume Party trend is one of glamour, print, and excess.

Lingerie is almost over-designed, with detailing, trims, and prints making each garment a statement piece.



© Alexandra Suhner Isenberg 2009

Venetian Costume Party Fabrics



Costume or themed pieces are important here, as are animal prints, warm and jewel tones, bows, ruffles, tassels, and exotic prints.



© Alexandra Suhner Issenberg 2009

Future Lines

Fashion-inspired lingerie shapes with structural, design-led shapes.

Strong, architectural catwalk looks dictate the Future Lines trend.

Cut-outs and seam lines are sharp and edgy.



CONCLUSION

The current trading environment is tougher than in recent years, however there are many opportunities for brands to increase sales and raise brands awareness. For more information on how your brand can apply the facts in this report, or a personalised or more detailed version of this report and the future trends, please contact Alexandra Suhner Isenberg on alexandrasuhner@gmail.com.