

Underwear - UK - February 2012

Report Price: £1750 / \$2837 / €1995

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"Over four in ten (44%) women think that wearing nice underwear has the power to make them feel good. Underwear brands and retailers can tap into this strong emotional connection between putting on attractive and well-fitting underwear and feelings of positivity to stimulate higher levels of self-purchasing. Marketing messages could convey how – particularly in times of financial hardship – an indulgent yet well-deserved treat in the form of superior quality or luxurious underwear is a small price to pay for an instant boost to mood and self-esteem."

– Emma Clifford, Fashion and Clothing Analyst

In this report we answer the key questions:

- How can retailers drive non-replacement purchasing?
- What categories are fuelling growth within the underwear market?
- What opportunities are there for multichannel retailing?
- What role does fashion play within the underwear market?
- How can retailers encourage gift purchasing?
- What does 2012 have in store for the underwear market?

Underwear is commonly viewed as a fundamental part of consumers' daily attire and as such enjoys high levels of purchasing; approximately 41.9 million Britons (81% of the population) bought undergarments in the last 12 months. However, replacement is – by a substantial margin – the biggest motivation for purchasing. The widespread availability of low-priced underwear and the rising popularity of supermarkets and value retailers have limited value growth within the sector. However, higher input costs are putting retailers under pressure to increase their prices or sacrifice their profit margins.

The challenge for underwear brands and retailers is to create more non-mundane and desire-driven reasons to tempt shoppers to invest in new items at higher price points, despite the turbulent economic landscape. New innovations in fabrics and designs, inventive marketing campaigns and visually compelling displays all play pivotal roles in drumming up the feelgood factor strongly associated with high quality, attractive underwear.

The product groups covered include:

- women's lingerie – including bras, briefs and other items – and hosiery and socks
- men's underwear – including briefs, boxers, vests and other items – and socks.

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