



Underwear: Inc Impact of COVID-19 - UK - June 2020

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

Many of the newer and more innovative underwear brands that have launched in the last year and are driving growth in the sector have made fitting solutions a priority, whilst also addressing changing consumer demands for sustainability, size inclusivity and more skin tone diversity.

- The impact of COVID-19 on consumer behaviour and shopping for underwear, nightwear and loungewear.
- What will happen to sales of underwear, nightwear and loungewear in 2020 as a result of the COVID-19 outbreak.
- Adapting to the shift towards greater online purchasing.
- The growing focus on size inclusivity and skin tone diversity in underwear products and advertising.



“As online shopping for underwear increases and the shift away from stores outlasts the COVID-19 outbreak and creates a longer lasting legacy, retailers will need to invest more heavily in digital fitting technology to help women more easily buy the correct fit and shape of bras online.”

– Tamara Sender Ceron,
Senior Fashion Analyst, 18/
06/20

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **What you need to know**
- **Key issues covered in this Report**
- **Products covered in this Report**

EXECUTIVE SUMMARY

- **The market**
- **COVID-19 will lead to a big fall in sales in 2020**
Figure 1: Forecast for consumer spending on underwear, nightwear and loungewear in the UK (adjusted for COVID-19), 2015-25
- **Market will see some recovery in 2021**
- **Growth of loungewear market**
Figure 2: Estimated consumer spending on underwear, nightwear and loungewear, by category, 2020
- **High rates of obesity create a need for size inclusivity**
- **Consumers future confidence wanes**
- **Impact of COVID-19 on Underwear**
- **Opportunities and Threats**
Figure 3: Expected impact of COVID-19 on underwear, nightwear and loungewear, short-, medium- and long-term, June 2020
- **Companies and brands**
- **M&S to add third party brands as Next grows branded offer**
- **Emerging brand Savage X Fenty perceived as cool and diverse**
Figure 4: Attitudes towards and usage of selected underwear brands, June 2020
- **Inclusivity provides retailers with opportunities to cater to niche markets**
- **The consumer**
- **Big decline in underwear purchases during the lockdown**
Figure 5: What fashion items people have bought in the last three months, Mar-Jun 2020
- **Gen Z drive self-purchasing**
Figure 6: Purchasing of underwear, nightwear and loungewear in the last 12 months, April 2020
- **Women favour non-wired bras**
Figure 7: Types of underwear, nightwear and loungewear women have bought for themselves in the last 12 months, April 2020
- **Young men favour tight-fitting trunks**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 8: Types of underwear, nightwear and loungewear men have bought for themselves in the last 12 months, April 2020

- **Big rise in online shopping**

Figure 9: How underwear, nightwear and loungewear was purchased in the last 12 months, April 2020

- **Value retailers most popular**

Figure 10: Type of retailers consumers have purchased nightwear, loungewear and underwear at in the past 12 months, April 2020

- **Women prioritise price**

Figure 11: Purchase drivers when buying underwear, nightwear and loungewear in the last 12 months, April 2020

- **Encouraging women to have bra fittings**

Figure 12: Agreement with shopping behaviour statements when buying underwear, nightwear and loungewear in the last 12 months, April 2020

- **Importance of comfort**

Figure 13: Attitudes towards shopping for underwear, nightwear and loungewear in the last 12 months, April 2020

- **Rising interest in recycling option**

Figure 14: Interest in innovations when shopping for underwear in the last 12 months, April 2020

- **What we think**

THE IMPACT OF COVID-19 ON UNDERWEAR

- **Short-, medium- and long-term impact on the industry**

Figure 15: Expected impact of COVID-19 on underwear, nightwear and loungewear, short-, medium- and long-term, June 2020

- **Short-term**

- **Medium-term**

- **Long-term**

- **Opportunities and Threats**

- **Promoting loungewear as the new work at home outfit**

Figure 16: Loungewear searches in the UK, Mar- Jun 2020

Figure 17: Missguided's social distancing checklist loungewear, May 2020

- **Evenings in create opportunities for indulgent lingerie**

- **Using technology to elevate the shopping experience**

- **Encouraging more people to have bra fittings by offering the service online**

- **Masks provide specialists with a new sales category**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 18: Face covering by Bluebella Lingerie, June 2020

- **Impact on the market**
- **Big decline in sales expected in 2020**

Figure 19: Forecast for consumer spending on underwear, nightwear and loungewear in the UK (adjusted for COVID-19), 2015-25

- **Some recovery expected in 2021**
- **Shifts in consumer behaviour**
- **Growing focus on health and wellbeing trend**

Figure 20: Agreement with the statement 'I have taken part in more home workouts as a result of the covid-19 outbreak', by generations, 9-16 April 2020

- **Shift towards comfortable styles**
- **Support for local independent lingerie retailers**

Figure 21: Agreement with the statement 'I am shopping more from local businesses since the start of the covid-19 outbreak', by generations, 4-11 June 2020

- **Niche brands could benefit**
- **How the crisis will affect key consumer segments**
- **Young will continue to shop online**
- **Demand for bridal lingerie for post-COVID-19 weddings**

Figure 22: Marriages in the UK by month, 2017

- **How a COVID-19 recession will reshape underwear**
- **Savvy shopping behaviours will be accentuated**
- **Value retailers benefited in the 2008/09 recession**
- **Impact on the marketing mix**
- **Brands showing support for COVID-19 effort viewed favourably**
- **Shift towards user generated marketing and photo content**
- **COVID-19: Market context**

ISSUES AND INSIGHTS

- **Growing focus on inclusivity and diversity in underwear**
- **The facts**
- **The implications**
- **Maintaining the focus on sustainability despite changing priorities**
- **The facts**
- **The implications**

THE MARKET – WHAT YOU NEED TO KNOW

- **COVID-19 will lead to a big fall in sales in 2020**
- **Market will see some recovery in 2021**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Growth of loungewear market**
- **High rates of obesity create a need for size inclusivity**
- **Shoppers cut back on clothing and accessories**
- **Consumers future confidence wanes**

MARKET SIZE AND FORECAST

- **Market growth slows to 2.7% in 2019**
Figure 23: Consumer spending on underwear, nightwear and loungewear in the UK (including VAT), 2015-19
- **Outlook in light of COVID-19**
- **COVID-19 will lead to a big fall in sales in 2020**
Figure 24: Forecast for consumer spending on underwear, nightwear and loungewear in the UK (adjusted for COVID-19), 2015-25
Figure 25: Forecast for consumer spending on underwear, nightwear and loungewear in the UK (adjusted for COVID-19), 2015-25
- **Impact of the previous recession on underwear**
- **Market will see some recovery in 2021**
- **Forecast methodology**

MARKET SEGMENTATION

- **Women dominate the market**
Figure 26: Estimated consumer spending on underwear, nightwear and loungewear, by gender, 2020
- **Growth of loungewear market**
Figure 27: Breakdown of estimated consumer spending on underwear, loungewear and nightwear, by category, 2015-20

MARKET DRIVERS

- Figure 28: Trends in the age structure of the UK population, 2019-29
- Figure 29: Breakdown of trends in the age structure of the UK population, 2019-29
- **Births and marriages influence certain underwear categories**
Figure 30: Total number of births and marriages in the UK 2012-18
 - **Annual percentage change in consumer prices**
Figure 31: Real wage growth – Average weekly earnings vs inflation, 2016-20
 - **High rates of obesity create a need for size inclusivity**
Figure 32: Overweight and obesity prevalence, 2014-18

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Brexit seen as having negative impact on household income**
Figure 33: Consumers perceived impact of Brexit on household income, May 2020
- **Consumers future confidence wanes**
Figure 34: Consumer financial confidence, January 2018-May 2020
- **Shoppers cut back on clothing and accessories**
Figure 35: Consumers shopping habits in the next month on clothing and accessories, 14-21 MAY 2020
- **Consumers cut back on non-essential purchases**
Figure 36: Consumers changing shopping habits due to COVID-19, 14-21 MAY 2020

COMPANIES AND BRANDS – WHAT YOU NEED TO KNOW

- **M&S to add third party brands as Next grows branded offer**
- **Specialists struggle as demand moves online**
- **Emerging brand Savage X Fenty perceived as cool and diverse**
- **Advertising spend on underwear and nightwear totals £5 million in 2019**
- **Inclusivity provides retailers with opportunities to cater to niche markets**

LEADING PLAYERS

- **Non-specialists**
- **M&S to add third party brands as Next grows branded offer**
- **Supermarkets and value retailers benefit from low priced offer**
- **Department stores struggle**
- **Specialists trading results are mixed**
- **Victoria's Secret goes into administration**
- **Ann Summers struggles with rising rent costs**
- **Lovehoney sees an uptick during lockdown**
- **Bravissimo benefits from store refurbishments and ecommerce improvement**
- **Boux Avenue seek rent reductions**
Figure 37: Leading specialist underwear retailers' total UK revenues, 2015-19
- **Leading specialists' number of outlets**
- **Rising rent costs cause store closures and CVAs**
- **Boux Avenue opens 30th store in Nottingham**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Victoria's Secret's expanded footprint at risk**
Figure 38: Leading specialist underwear retailers' total UK stores, 2015-19
- **Leading specialists' sales per outlet**
Figure 39: Leading specialist underwear retailers' estimated UK sales per outlet, 2015-19
- **Leading underwear brands struggle**
Figure 40: Leading underwear brands' total UK revenues, 2015-19
- **Non-specialists' underwear and nightwear space allocation**
Figure 41: Space allocation estimates for men and women's underwear/nightwear as a % of total clothing retail selling space, September 2019

LAUNCH ACTIVITY AND INNOVATION

- **Inclusivity**
- **Maison Lejaby launches post-surgery bra**
- **Belly Bandit shows off latest leak-proof technology for mothers**
Figure 42: Belly Bandit's proof underwear, 2020
- **HJ Halls launches diabetic friendly socks**
- **Diversity**
- **Pantherella launches pride socks in partnership with local charity trade**
Figure 43: Pantherella 'Shine' socks, 2020
- **Nubian Skin launches men's range of nude underwear**
Figure 44: Nubian Skin make underwear collection, 2020
- **Sustainability**
- **Bluebuck launches men's underwear made from ocean plastic**
Figure 45: Bluebuck's Seaqual mens underwear range, 2019
- **Royce Lingerie & launch the Eden organic cotton bra for Spring 2020**
Figure 46: Royce Lingerie's organic cotton bra, 2020
- **Calida and Viktor & Rolf collaborate to launch 100% compostable collection**
Figure 47: Calida X Viktor & Rolf 'We Want a Better World' capsule, 2020
- **Sainsbury's launches new range of period underwear Love Luna**
Figure 48: Love Luna campaign by Tu clothing, 2020
- **Collaborations**
- **Happy Socks and Queen team up**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 49: Happy Socks X Queen, 2019

- **Boohoo launches range with Coppafeel! to encourage breast checks**

Figure 50: Boohoo X Coppafeel collaboration, 2020

- **Technological innovations**
- **M&S bra-fitting goes digital**
- **Triumph's fit smart bra launches in the UK**

Figure 51: Triumph's Fit Smart' bra, 2020

- **COVID-19 launches**
- **M&S providing pyjamas for NHS workers**
- **Por Moi launches COVID-19 charity edit**

Figure 52: Pour Moi 'Lets Do This' campaign for its Charity Edit, 2020

- **Primark donates to NHS**
- **Missguided launches lockdown inspired range**

Figure 53: Missguided social distancing t-shirts, 2020

- **Swiss underwear brand starts producing masks**
- Figure 54: Calida's surgical face masks in collaboration with Viktor & Rolf, 2020

- **Bluebella created free colouring-in book for customers in lockdown**

Figure 55: Bluebella's colour-in book, 2020

ADVERTISING AND MARKETING ACTIVITY

- **Advertising spend on underwear and nightwear fell 42% in 2019**

Figure 56: Total above-the line, online display and direct mail advertising expenditure on underwear and nightwear, 2015-19

- **Digital the biggest channel for loungewear and underwear advertising**

Figure 57: Total above-the-line, online display and direct mail advertising expenditure on underwear and nightwear, by media type, 2019

- **Snag Tights had the biggest advertising spend in 2019**

Figure 58: Total above-the-line, online display and direct mail advertising expenditure on underwear and nightwear, by top companies, 2015-19

- **Key campaigns**
- **M&S hopes pyjamas will "jump off shelves" with Go Pyjamas Christmas ad**

Figure 59: M&S' 'Go Pyjamas' Christmas campaign, 2019

- **Debenhams "#Comfort is Confidence" campaign in 2019**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 60: Debenhams's 'Comfort if confidence, campaign, 2019

- **Sainsbury's launches 'All boobs welcome' campaign**

Figure 61: 'All Boobs Welcome' campaign by Sainsbury's Tu, 2019

- **COVID-19 advertising activity**

- **Key campaigns**

- **Snag Tights launches 'Save our Snag Tights' in an effort to raise funds**

Figure 62: Snag Tights' COVID-19

- **Bluebella hosts first zoom video catwalk show during lockdown**

Figure 63: Bluebella's 'virtual' catwalk for its SS2020 collection, 2020

BRAND RESEARCH

- **Brand map**

Figure 64: Attitudes towards and usage of selected underwear brands, June 2020

- **Key brand metrics**

Figure 65: Key metrics for selected brands, June 2020

- **Brand attitudes: Victoria's Secret seen as a trend setter**

Figure 66: Attitudes, by brand, June 2020

- **Brand personality: Bravissimo regarded as most ethical**

Figure 67: Brand personality – macro image, June 2020

- **Savage X Fenty perceived as cool**

Figure 68: Brand personality – micro image, June 2020

- **Brand analysis**

- **Victoria's Secret a popular favourite amongst Millennials**

Figure 69: User profile of Victoria's Secret, June 2020

- **Bravissimo seen as authentic and accessible**

Figure 70: User profile of Bravissimo, June 2020

- **Figleaves lacks differentiation**

Figure 71: User profile of Figleaves, June 2020

- **Sloggi is trusted for its comfort and durability**

Figure 72: User profile of Sloggi, June 2020

- **Spanx is considered reassuring**

Figure 73: User profile of Spanx, June 2020

- **Savage X Fenty seen as cool, urban and exciting**

Figure 74: User profile of Savage X Fenty, June 2020

THE CONSUMER – WHAT YOU NEED TO KNOW

- **Big decline in underwear purchases during the lockdown**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Gen Z drive self-purchasing**
- **Women favour non-wired bras**
- **Young women drive purchasing of sports bras**
- **Young men favour tight-fitting trunks**
- **Big rise in online shopping**
- **Women prioritise price**
- **Encouraging women to have bra fittings**
- **Over half like to wear loungewear at home**
- **Importance of comfort**
- **Growing demand for size and skin tone inclusivity**
- **Rising interest in recycling option**

FASHION PURCHASING

- **Big decline in underwear purchases during the lockdown**
Figure 75: What fashion items people have bought in the last three months, Mar-Jun 2020
- **Appetite for fashion falls**

UNDERWEAR, NIGHTWEAR AND LOUNGEWEAR PURCHASING

- **Gen Z drive self-purchasing**
Figure 76: Purchasing of underwear, nightwear and loungewear in the last 12 months, April 2020
- **Women and high earners buy for others**
Figure 77: Purchasing of underwear, nightwear and loungewear in the last 12 months, by gender, April 2020
- **A third of older men haven't purchased**
Figure 78: Purchasing of underwear, nightwear and loungewear in the last 12 months, by gender, April 2020

WHAT WOMEN BUY

- **Women favour non-wired bras**
Figure 79: Types of underwear, nightwear and loungewear women have bought for themselves in the last 12 months, April 2020
- **Young women drive purchasing of sports bras**
Figure 80: Percentage of shoppers who have bought sports bras in the past 12 months, by age group, April 2020
- **Shapewear is on trend among under-35s**
Figure 81: Percentage of shoppers who have bought shapewear in the past 12 months, by age group, April 2020
- **Loungewear suits our lifestyles**
Figure 82: Percentage of shoppers who have bought any loungewear/nightwear for themselves in the past 12 months, by gender, April 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Women buy multiple types of underwear items throughout the year**

Figure 83: Repertoire of the types of underwear, nightwear and loungewear women have bought for themselves in the last 12 months, April 2020

WHAT MEN BUY

- Young men favour tight-fitting trunks**

Figure 84: Types of underwear, nightwear and loungewear men have bought for themselves in the last 12 months, April 2020

- Young men drive purchasing of loungewear**

Figure 85: Percentage of consumers who have purchased any loungewear over the past 12 months, by age group, April 2020

- 16-24s drive sock purchasing**

Figure 86: Percentage of consumers who have purchased socks over the past 12 months, by age group, April 2020

- Men purchase fewer items of underwear**

Figure 87: Repertoire of the types of underwear, nightwear and loungewear men have bought for themselves in the last 12 months, April 2020

HOW AND WHERE THEY SHOP

- Stores capture majority of consumer purchases**

Figure 88: How underwear, nightwear and loungewear was purchased in the last 12 months, April 2020

- Online purchasing rises to 51%**

Figure 89: Percentage of consumers who have shopped online in the past 12 months, by age group, April 2020

- 16-24s shop online through smartphones**

Figure 90: How underwear, nightwear and loungewear was purchased in the last 12 months, by age group, April 2020

- Value retailers most popular**

Figure 91: Type of retailers consumers have purchased nightwear, loungewear and underwear at in the past 12 months, April 2020

- Men shop for underwear online**

Figure 92: Type of retailers consumers have purchased nightwear, loungewear and underwear at in the past 12 months, by gender, April 2020

- Shoppers have their favourite retailer**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Underwear: Inc Impact of COVID-19 - UK - June 2020



Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 93: Repertoire of retailers used to buy nightwear, loungewear and underwear in the past 12 months, April 2020

PURCHASE DRIVERS

- **Women prioritise price**
Figure 94: Purchase drivers when buying underwear, nightwear and loungewear in the last 12 months, April 2020
- **Millennials focus on quality of shopping experience**
Figure 95: Purchase drivers when buying underwear, nightwear and loungewear in the last 12 months, April 2020

SHOPPING BEHAVIOURS

- **Close to three quarters buy on discount**
Figure 96: Agreement with shopping behaviour statements when buying underwear, nightwear and loungewear in the last 12 months, April 2020
- **Encouraging women to have bra fittings**
Figure 97: Agreement with the statement 'I have used a bra fitting service in the last 12 months', April 2020
- **Over half like to wear loungewear at home**
Figure 98: Underwear – CHAID – Tree output, April 2020
- **Methodology**
Figure 99: Underwear – CHAID – Table output, April 2020

ATTITUDES TO SHOPPING FOR UNDERWEAR, NIGHTWEAR AND LOUNGEWEAR

- **Importance of comfort**
Figure 100: Attitudes towards shopping for underwear, nightwear and loungewear in the last 12 months, April 2020
- **Growing demand for size and skin tone inclusivity**
- **Gen Z and Millennials shop at brands that support causes**
Figure 101: Agreement with the statement 'It's preferable to shop at retailers/brands that support important causes', by generations, April 2020

INTEREST IN INNOVATIONS

- **Growing demand for recycling options**
Figure 102: Interest in innovations when shopping for underwear in the last 12 months, April 2020
- **Importance of trying on**
- **Interest in virtual fittings**
Figure 103: Interest in being able to try on underwear virtually, by generations, April 2020
- **Young men drawn to subscription service**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Underwear: Inc Impact of COVID-19 - UK - June 2020



Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

APPENDIX – MARKET SIZE AND FORECAST

- **Forecast methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.