

# Men's & Women's Underwear - US - 2022

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## This report looks at the following areas:

- Items purchased by men and women
- Retailers shopped
- Important features when shopping for underwear
- Purchasing behaviors
- Attitudes toward underwear for men and women

For the majority of consumers (63%), underwear is purchased when they have a need to replace items; however, 37% of consumers purchase underwear even if they do not need to replace items. This indicates that underwear is more than a necessity purchase and there is opportunity to encourage impulse purchases. While comfort and fit are the primary drivers for purchasing underwear, features such as fun styles, colors, and inclusive sizing will drive purchases as well.

Inflation continues to be an issue for brands and consumers alike. Rising prices and shrinking wallets make it difficult for consumers to purchase greater quantities of underwear or underwear at higher prices. Shoppers are seeking value from brands – durability of items and quality pieces are as central in providing value as the price itself. Consumers might also be opting to stick with what they already own rather than buy new pieces, making it more difficult for brands to encourage new purchases.

One of the biggest threats to the market outside of inflation is the lack of innovation. Consumers are seeking brands that provide inclusive sizing and represent what real consumers look like. The underwear market, and big name brands specifically, need to rethink their marketing strategies. Authenticity is key to connecting with consumers.

One of the largest opportunities for the underwear market is to make underwear a fashion piece to boost consumers' confidence rather than a garment that needs to be hidden away. Some brands have already started



"The underwear market is poised for growth and rapid change. Already, the market has seen a push toward inclusive sizing and body-positive messaging, which has opened up ample opportunity for smaller brands."

- **Katie Hansen, Senior Analyst, Retail & eCommerce**

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down this path, encouraging consumers to make underwear the centerpiece of outfits. Underwear can help consumers express themselves and help them feel confident about their body and who they are.

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