“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

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

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

The Impact of COVID-19 on Underwear

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

Short-term

Medium-term

Long-term

Opportunities and Threats

Promoting loungewear as the new work at home outfit

Evenings in create opportunities for indulgent lingerie

Impact on the market

Big decline in sales expected in 2020

Some recovery expected in 2021

Shifts in consumer behaviour

Growing focus on health and wellbeing trend

Shift towards comfortable styles

Support for local independent lingerie retailers

Niche brands could benefit

How the crisis will affect key consumer segments

Demand for bridal lingerie for post-COVID-19 weddings

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
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
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
Outlook in light of COVID-19
COVID-19 will lead to a big fall in sales in 2020
Forecast methodology

Market Segmentation
Women dominate the market
Growth of loungewear market

Market Drivers
Births and marriages influence certain underwear categories

Issues and Insights

Figure 23: Consumer spending on underwear, nightwear and loungewear in the UK (including VAT), 2015-19
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
Figure 26: Estimated consumer spending on underwear, nightwear and loungewear, by gender, 2020
Figure 27: Breakdown of estimated consumer spending on underwear, loungewear and nightwear, by category, 2015-20
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
Figure 30: Total number of births and marriages in the UK 2012-18

BUY THIS REPORT NOW

VISIT: store.mintel.com
CALL: 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
EMAIL: reports@mintel.com
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

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
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
  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: Por Moi ‘Let’s 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
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
The Consumer – What You Need to Know

Big decline in underwear purchases during the lockdown
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
Underwear: Inc Impact of COVID-19 - UK - June 2020

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

Loungewear suits our lifestyles
Figure 81: Percentage of shoppers who have bought shapewear in the past 12 months, by age group, April 2020

Women buy multiple types of underwear items throughout the year
Figure 82: Percentage of shoppers who have bought any loungewear/nightwear for themselves in the past 12 months, by gender, April 2020

What Men Buy
Young men favour tight-fitting trunks
Figure 83: Repertoire of the types of underwear, nightwear and loungewear women have bought for themselves in the last 12 months, April 2020

Men purchase fewer items of underwear
Figure 84: 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 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

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

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

16-24s shop online through smartphones
Figure 89: Percentage of consumers who have shopped online in the past 12 months, by age group, April 2020

Purchase Drivers
Women prioritise price
Figure 90: How underwear, nightwear and loungewear was purchased in the last 12 months, April 2020

Millennials focus on quality of shopping experience
Figure 91: Type of retailers consumers have purchased nightwear, loungewear and underwear at in the past 12 months, April 2020

Shopping Behaviours
Close to three quarters buy on discount
Figure 92: Type of retailers consumers have purchased nightwear, loungewear and underwear at in the past 12 months, by gender, April 2020

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

Over half like to wear loungewear at home
Underwear: Inc Impact of COVID-19 - UK - June 2020

Report Price: £1995.00 | $2693.85 | €2245.17

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

Methodology
Figure 98: Underwear – CHAID – Tree output, April 2020
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

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations
Consumer research methodology

Appendix – Market Size and Forecast

Forecast methodology