

# ***underlines magazine***

- Established in 1989
- Publish six b2b magazines a year
- Managed and co-owned by Pamela Scott
- Distribution to brands, stores & shops,etailers and suppliers
- Covering all of the UK and Republic of Ireland.
- Produce and stage annual Retail and Etail Awards.

SUNFLAIR  
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Stars  
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BESTSHOPAWARDS

*Best Shop Awards 2017*

Where Retailers are the Stars!



*Gala Programme*

*9th November 2017*

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# SWIMWEAR

TRENDS  
2018

Price £25/€30/US\$35  
July 2017



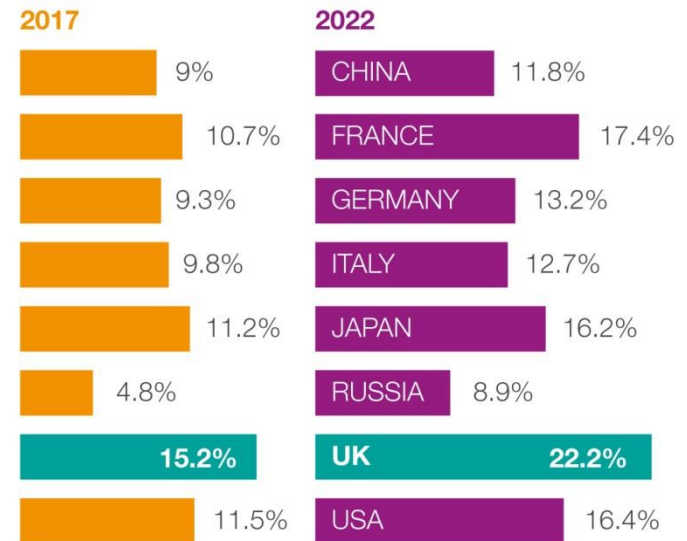
# YEARBOOK

THE SWIMWEAR YEARBOOK™ IS PUBLISHED BY UNDERLINES MAGAZINE

# THE UK/IRISH MARKET: SIZE AND POTENTIAL

- The lingerie market has been growing slower than the ready-to-wear sector with total value estimated between 2.5billion (Euromonitor) and 2.8billion (Mintel);
- Nonetheless this figure represents approximately 22% of the Western European market for lingerie.
- UK retailers have to fight hard to survive and part of that strategy is built on a hunger for new product and new brands.
- Despite Brexit the UK economy is remaining resilient and is still one of the fastest growing European economies.
- The UK is in fact leading the world in e-commerce sales as a percentage of total retail sales – it captures a greater share of sales and mobile commerce accounts for a larger proportion of e-commerce. A truly multi-channel retail economy that is mature and diverse.

## UK LEADS THE WORLD IN e-COMMERCE



ONLINE SALES AS % OF RETAIL  
(Planet Retail/RNG)

# UK & IRELAND

- The UK lingerie market has seen a period of steady growth over last 5 years with renewed interest in buying intimate apparel and loungewear. The Irish market has recovered with stabilisation of its position in the European economic community.
- Imports far outweigh exports (primarily from Asia and Oceania which is still responsible for two-thirds of total imports of lingerie and corsetry into the UK).
- The UK is a crowded and saturated market, increased by the arrival of lingerie retailers such as Victoria's Secret and British consumers are the most active e-shoppers in all of Europe.
- The main source of retail distribution is own-brand lingerie stores ([Ann Summers](#), [La Senza](#), [Victoria's Secret](#), [Agent Provocateur](#), [Boux Avenue...](#)) with multiple retailers and department stores in 2<sup>nd</sup> place ([Marks & Spencer](#), [John Lewis](#), [House of Fraser](#), [Debenhams...](#)). At present online retailers account for around 10% of market share in these sectors.
- The UK/Ireland is one of the most developed multi-channel distribution countries in the world, really only comparable to the USA. Germany, France, Spain and Italy still have more 'traditional' routes to the market but the situation is changing rapidly.
- In terms of brands, the largest branded house is [the Wacoal Group](#) which owns some 7 brands present in the market.
- The plus size market is the single fastest growing sector – with 1 in 4 adults classified as obese and 61.7% overweight. (United Nations Food and Agricultural Organisation)

# LOVE AFFAIR with e- and mobile shopping

Some see the rise of e-commerce as a threat to the more 'traditional' shopping avenues such as department stores, independent shops and specialists but this has not proven the case. UK's bricks and mortar retailers do in fact take a bigger share of online sales and are managing the shift to digital retailing better than their counterparts in other Western countries.

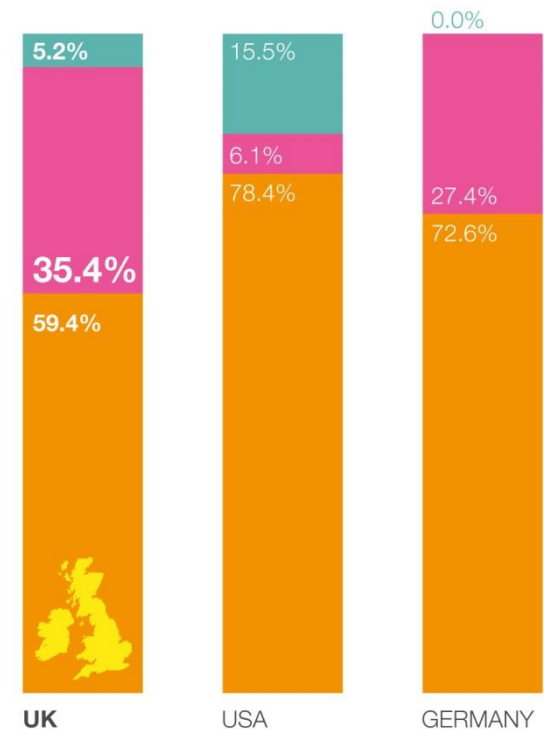
## LINGERIE E-COMMERCE SITES – THE TOP 5

Of the top 5 e-commerce sites, Figleaves is the only multi-brand platform.

Source: Inside Online September 2017

SITE	Jun-17	Jun-16	Difference
figleaves.com	16564	15105	10%
bouxavenue.com	15761	14560	8%
annsummers.com	15586	18182	-14%
lovehoney.co.uk	11941	14611	-18%
victoriassecret.com	11526	15727	-27%
spanklingerie.com	7736	8100	-5%

## UK'S BRICK AND MORTAR RETAILERS TAKE BIGGER SHARE OF ONLINE SALES



The UK's established retailers have proved more successful than other leading retailers in the world at retailing across offline and online channels

- Internet only
- Bricks-and-Mortar
- Catalogue

## ***Other Significant Multi-Brand Etailers***

- - Uklingerie.com/Uktights.com and UKSwimwear.com - family owned private business with variety of price points (commercial through to luxury) – their sites are bucking the trend and are growing much fastest than any of their rivals
- - Lingerieoutletstore.com – a variety of well known UK, European and US brands (a big discount on normal retail prices)
- - Bravissimo.com – market speciality in larger cup sizes but also nightwear, swimwear, sportswear and clothing
  
- ***Trade shows in the UK***
- The exhibition scene in the UK & Ireland has significantly changed in the last 12 months. The Moda event in Birmingham for lingerie no longer exists and the Associated Independent Stores' event (INDX) in Solihull is now the centre of meeting retailers, stores and etailers.
- Their costs are considerably less (small stands at £145-£160 per square metre or large stands at £100 per square metre.
- It is a national event for swimwear, lingerie, nightwear, homewear, legwear and activewear.
- [www.indxshow.co.uk](http://www.indxshow.co.uk)