

Webinar Series

Tune In
Every Wednesday
@ 12:30PM EST



Wednesday, April 8th
12:30pm EST

“Seeking Comfort: Intimate Apparel in a COVID-19 World”

Hosted by Kristen Classi-Zummo & Todd Mick of The NPD Group’s Fashion Apparel team

Any technical questions or issues during the webinar?

→ Email Sarah Evans at sarah@curvexpo.com

NPD Credentials

**We are viewed as the authority
on market size and trends**

BY OUR CLIENTS, THE MEDIA, THE FINANCIAL COMMUNITY, AND OTHERS

Expertise in more than 20 industries

POINT-OF-SALE DATA FROM
OVER **220,000 doors**
PLUS E-COMMERCE AND
MOBILE PLATFORMS

**Millions of
receipts from**
BRICK-AND-MORTAR
AND E-COMMERCE
(CHECKOUT)



MORE THAN **12 million**
consumer surveys
CONDUCTED ANNUALLY

OPERATING IN **19** COUNTRIES IN THE AMERICAS,
EUROPE, AND ASIA-PACIFIC



FOUNDED IN
1966

1600+ EMPLOYEES WORLDWIDE

MORE THAN **2,000 of the world's**
leading brands and retailers
ARE NPD CLIENTS



2019 Highlights

Media Entertainment



Consumer Electronics



Small Appliances



Office Supplies



Apparel



Accessories



Source: NPD US Consumer Tracking Service

Macro Trends We Are Watching

Finding Comfort Pre-Coronavirus

Comforts of Home



- Smarter Homes
- Bye-Bye Boring
- Home Entertainment

Tribes



- #Stayingtogetherapart
- Sense of Belonging
- Age Is Not Enough

360° of Sustainability



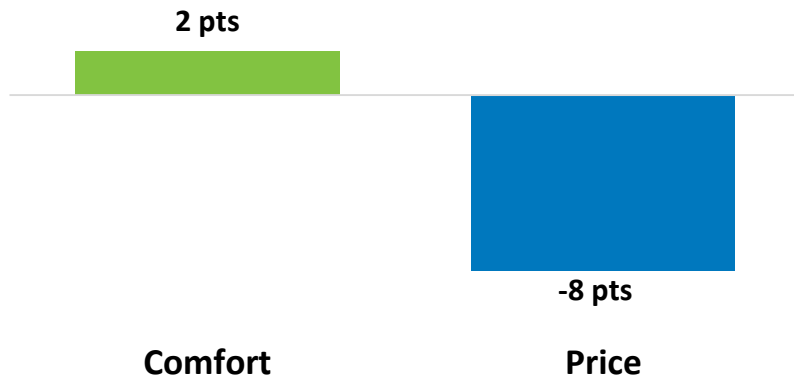
- Buying Better
- Doing Better
- Continuous Change

Comfort Wins

Less consumers found price most important when buying clothes.

When buying clothes for yourself, which of the following is most important to you?

2020 vs 2018



Excludes= Style, Brand Name, Other, and I do not shop for apparel

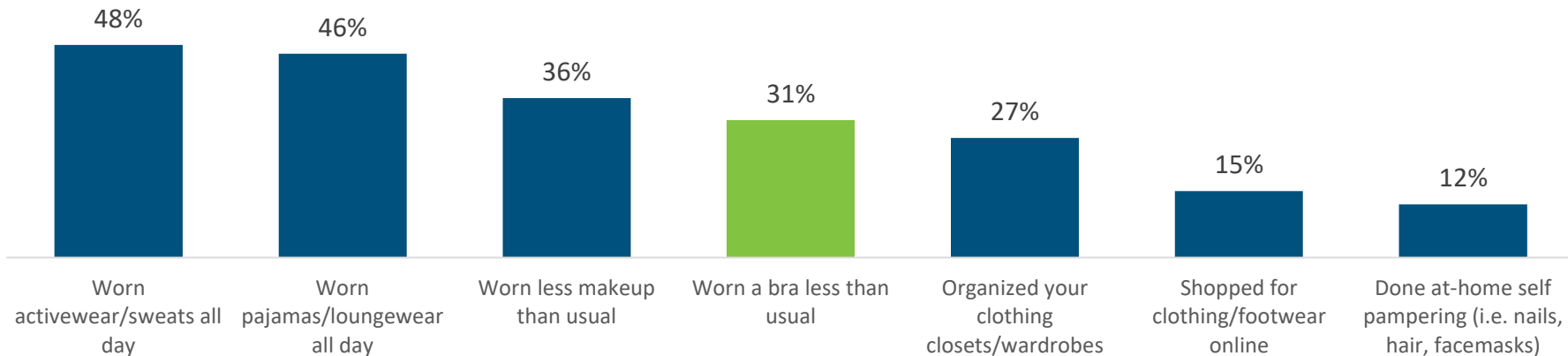
Source: NPD Omnibus February 2018/March 2020



Stay-at-home Behaviors

~1/3 of those who stayed home reported wearing a bra less than usual

Which of the following best describes what you've done while staying at home due to the coronavirus within the past week? (Select all that apply)



All respondents in segment US Adults 18+ weighted by U.S. Adults 18+
823 responses from 03/20/2020 to 03/23/2020
Exported on 03/23/2020
Excluding None of the above and I've not been staying home

Source: Civic Science

New Tribes Emerge

As we are called to quarantine, new ways of connecting with like-minded individuals emerge.

#CoReadingVirus



Cooking Classes



Live Cooking Class - Mozzarella Making 🍕

a week ago · 1.1K Views



Mindfulness

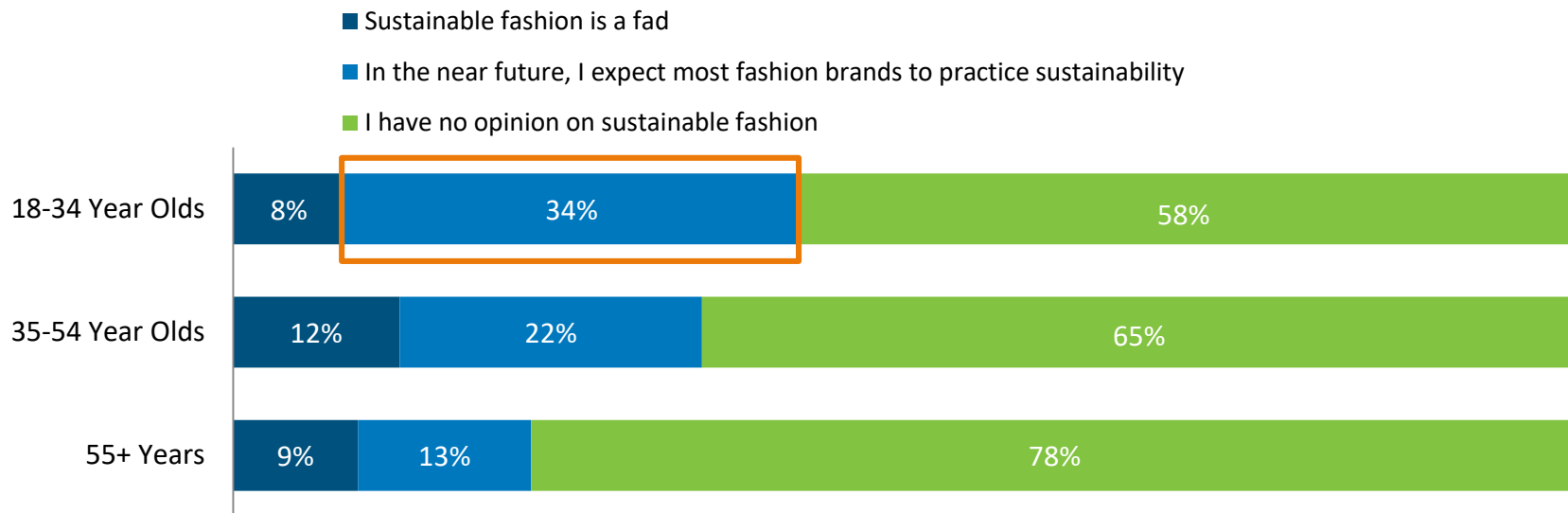


Escapism



Younger Consumers See Future in Sustainability

Over 1/3 of consumers 18-34 expect most fashion brands to practice sustainability in the near future.



All respondents in my account weighted by U.S. Adults
917 responses. Significance: $X^2(df=4)=41.778, p<0.001$, High Strength of Association ($T=0.151$)
Exported on 04/15/2019

Source: Civic Science

INTIMATES OVERVIEW

What Drives Her to Spend – Pre Covid-19?

Four key themes driving growth in intimate apparel



Economic Value and Thrill of the Hunt

Mass and Off Price continues to drive dollars across categories.



Consumers' Values and Community

Retailers are experiencing great success with size, ethnic, gender inclusivity.



Easy to Understand Benefits

Give her the benefits you know she needs on her terms.



Dot Com Growth

Ease of purchase and selection are driving her online spend, thus driving the market

Women's Apparel Performance

Total Women's Apparel declined -2% vs. LY. Categories that experienced growth were Sweaters, Bras and Sleepwear.

Women's \$'s -2%

Women's Units Flat

Women's AUR -2%

Top Growing Women's Apparel Categories



Total Bras

+2%



Sleepwear

+5%



Sweaters

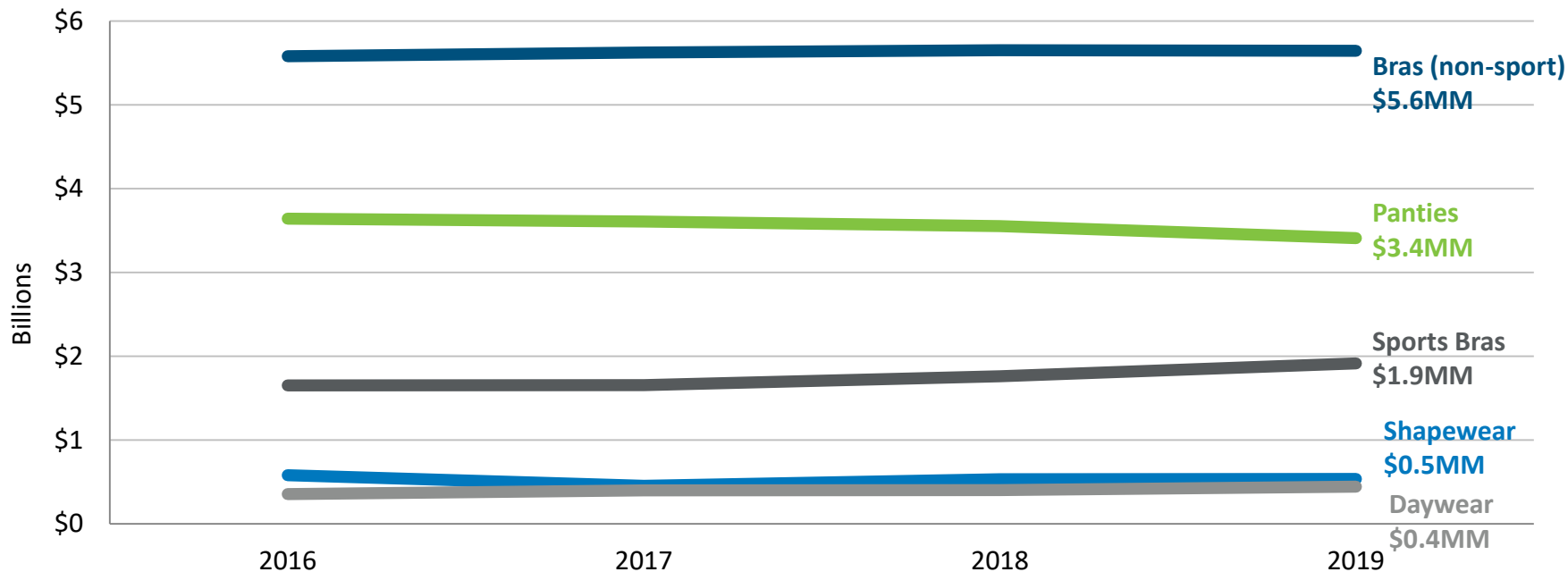
+2%

Dollar % Change

Source: The NPD Group/Consumer Tracking Service 12ME December '19- Adjusted Measures

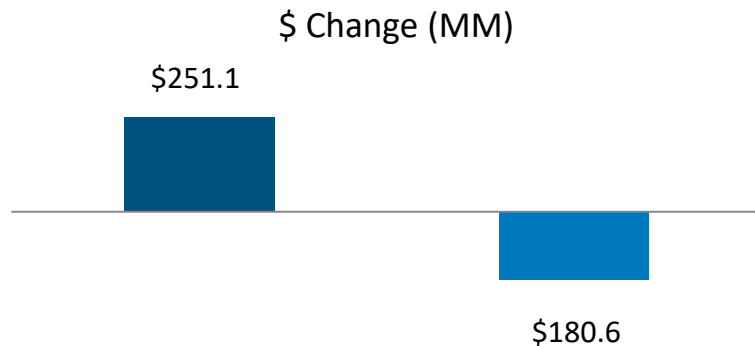
Intimates 4 Year Trend – Total Market

It's a mature industry; stealing share is still the game to play...



Source: The NPD Group/Consumer Tracking Service - 12ME Dec'19

Online Growth Begins to Offset In Store Declines



Women's Intimates	Online +9%	In Store -2%
Dollar Volume	\$3.0B	\$8.6B
Dollar Share	25%	72%
Share Pt. Change	+2pts	-2pts

Source: The NPD Group/Consumer Tracking Service - 12ME Dec 19 adjusted measures



Another Theme comes front and Center..

HOME



Will QVC story telling take off?

COMFORT

**NO BRA,
NO PROBLEM**



Is Loungewear the new Streetwear?

Home Instincts
Driving Comfort



What Drives Her to Spend – Post Corona-19?

What we will be watching as these drivers evolve?



Value and Thrill of the Hunt

Mass and Off Price continues to drive dollars across categories.

**Value Players Drive More Value for Consumers
Pent Up Demand for Treasure Hunting**



Values and Community

Retailers are experiencing great success with size inclusivity.

Values Shift – How did you help me and my community?



Easy to Understand Benefits

Give her the benefits you know she needs on her terms.

**Real Consumer Benefits
= COMFORT X 1 Million**



Dot Com Growth

Ease of purchase and selection are driving her online spend, thus driving the market

OminChannel becomes Seamless Commerce

Want More Insights?

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Executive Director,
– fashion apparel



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Director, Market Insights
– fashion apparel



Questions?

Want to know more about NPD and how we support the industry?



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Thank you

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