

■ INNOVATION IN RETAIL ■

INTIMATE APPAREL HAS EVOLVED; IT HAS COME OF AGE WITH THE FINE LINE BETWEEN OUTERWEAR AND INNERWEAR BLURRING MORE AND MORE WITH EACH PASSING DAY. TODAY, INNERWEAR IS CLASSIFIED NOT JUST AS SOMETHING ESSENTIAL BUT ALSO AS SOMETHING THAT CATERS TO THE LUXURIOUS AND CLASSIC LIFESTYLE OF GEN Y.

by Ken Nisch _____



The revolutionary world of innerwear

Attitudinal shift of the millennial generation



Shapewear is a fast growing category - both in volume and consumer relevance.

The innerwear category is in the midst of reinvention and revolution in India. It essentially touches all consumers: young and old, urban and rural, trendy and traditional, rich and poor. It is also diverse and multi-dimensional, resisting all attempts to call it innerwear to characterise it as a single name or category. So whether we call it lingerie, activewear, innerwear or intimate apparel, it is personal and individual just like the category itself. Within the traditional Indian market, the intimate apparel category, particularly brands related to the female consumer, is one that is subject to, and often rebelling against, conventional culture mores.

Blurring lines

In many parts of the world, the fine line between what is considered to be worn on the outside or worn below has blurred. Prime time television finds us watching Victoria's Secret fashion shows with the likes of entertainers, celebrities and stylists using the category more as clothing than intimate apparel. The category has been demonised and sensualised on one hand, while on the other, it has become aspirational, luxurious and classic.



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The idea of men's and women's categories connecting with activewear, be it through yoga-related products, exercise and swimwear, have blurred the traditional lines of what constitutes innerwear, intimate apparel and activewear.

Like so much of fashion, the book is yet to be written, particularly within the Indian marketplace. Given the crossroad of external influences and history, the path that the category will take in evolving within the marketplace will make for some interesting watching.

Consumer-centricity

Looking beyond the practical and physical limitations of the category as apparel, the psychographic nature of the target consumer should not be overlooked. One customer may be looking for comfort – focusing more on features, benefits, fabrication and content – while another may be seeking out adventure, thrill, romance, and self-actualisation.

As we look at the retail environment, the consumer sees the potential environment much more along the path of seeking a beautiful spa, a

relaxing resort or retreat, considering purchases as more personal – seeking out their time, their place, and their dressing to suit their personal needs and tastes – rather than looking to make a statement. In this environment, the atmosphere, whether it be the music, the scent, the associates, or the location, calls for a place away from or beyond the typical exposed and active retail environment.

They desire a place to try on a product in comfort with privacy, as the consumer knows that many, if not all, of the decisions are made not on the sales floor, but in the fitting room. Lights that are attractive, mirrors that flatter, places that take into account the customer's clothing, relaxation, and even basic needs such as cleanliness and a fresh rejuvenating environment, are often overlooked – a huge mistake, particularly

Top Right: Crusee's retail concept is dramatic and communicates the active vibe. Above: Ladies's fitting room with mirrors all around.

when dealing with the aspirational consumer. As for that special touch, expose the consumer to other elements around this psychographic part of their life – from candles, fragrance and music to other accessory apparel items. Whether it be during the day or in the evening, provide key opportunities to take advantage of this dedicated, and often purposeful, shopping trip.

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Daywear to playwear

Conversely, looking at the opposite trend – and the one that is sure to raise the most eyebrows or the cultural ire in India – is for that which relates to the element of intimate apparel. In many parts of the world, there are vast controversies surrounding this category due to concerns around age, discretion, moral values and the image and respect of the female consumer. Without taking an editorial position on this ongoing battle, it is a phenomenon that has resulted in a plethora of high visibility and highly successful retail stores, such as Victoria's Secret, Soma Intimates, women'secret, Oysho, Gilly Hicks, Aerie, and La Senza. These brands occupy flagship locations in some of the most premium shopping streets from around the world, and range from the titillating but fairly middle market approach of Victoria's Secret to flagship stores for other brands that cross barriers, and have redefined the category from daywear to playwear. Store concepts such as Ann Summers (U.K.) and Blackheart (U.S.) have redefined the consumer's approach as to what is appropriate. They appeal not only to the female consumer, but have also become 'couple destinations', offering a night out that might start with a romantic dinner. In this environment, what defines the merchandise categories is only limited by one's imagination.

Not just for women

Let's not forget the other constituencies beyond the traditional female consumer. Today, because of the rise of everything – from licensed properties to celebrity lingerie and lingerie brands – the traditional consumer has expanded into teens and tweens, and particularly so for young men. They now see their innerwear as an important accessory that builds self-confidence from within and provides an unexpected and edgy fashion flair to their wardrobe. Clearly, certain fashion trends around outerwear that involve



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at least a hint of what lies within have influenced this area. Also, the growing trends around men's fragrance, personal care products and accessories have also changed the men's innerwear category from one of basic utility to high-profile, branded and fashionable products.

A prime example is the award-winning Crusoe design by FRDC, JGA's professional partner in India. This universally acclaimed retail concept is dramatic. It communicates the active vibe that the male customer is seeking. Unique to the store is a consumer-centric experience, created by using active sports elements to weave a story around the products. Sanjay Agarwal, founder of FRDC, explains, "The store stands true to Crusoe's attitude and captures the 'adventurous' side of the male consumer."

The idea of men's and women's categories connecting with activewear, be it through yoga-related products, exercise and swimwear, have also blurred the traditional lines of what constitutes innerwear, intimate apparel, and activewear. Many of the styling influences,



cues and codes – from materials, colour and detailing – have suddenly crossed borders between these categories that are difficult to define and differentiate.

What's next

The category is also becoming one of the areas where technology and intimacy connect. Body scanning, visualisation, virtual mirrors and even custom-made and bespoke products are increasingly becoming possible, particularly for the more premium consumer. The functional feature aspect of innerwear has come to play, be it sport-related, or frankly just for a dose of confidence, focusing on brands such as Under Armor, Nike, Pearl Izumi and The North Face. The creation of this product, which was initially intended purely for the playing field, has now crossed over to the club, the weekend and even to fashion, with a well-dressed millennial marking it as essential for their wardrobe.

With the rise of micro-manufacturing, accessories and customisation, the intimate apparel option will be a far cry from the basic white-and-functional; becoming branded, personalised, with on-stage aspects of intimate apparel for tomorrow's fashion world. It's just around the corner. **BOB**



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