



Beachwear Report 2018

In May and June 2018, retailers were interviewed by the publications in the Network Dessous, sampling nearly 500 retailers from the UK & Ireland, Germany, USA & Canada, Italy, Spain and Russia. Selected by the editors of each territory, the majority of the entire panel are recognised as their country's best sector retailers in the Best Shop Awards.

These retailers have shared their specialised insights, observations and on-the-ground experience with swim clientele: a vivid and inspiring portrait of swimwear, which, despite challenges posed by the economy and Mother Nature's capricious weather patterns, still comes out on top. The resultant in-depth survey is highly regarded by industry insiders as not only does it shed light on financial performances but also the season's best-selling styles and retail trends.

The respondents are virtually all independently owner-managed shops (with the vast majority selling lingerie as well as swimwear).

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SWIMWEAR & BEACHWEAR SALES IN 2018

QUESTION: COMPARE SALES IN 2017 WITH THE CURRENT YEAR TO 2018

SALES	UK/Ireland	USA/Canada	Germany	France	Italy	Spain	Russia
BETTER	64%	58%	49%	15%	23%	4%	26%
STABLE	29%	32%	50%	41%	56%	40%	40%
WORSE	7%	10%	1%	44%	21%	56%	34%

Sales were considerably better for most of the respondents in the UK/Ireland (and several mentioned the positive influence of selling swimwear 12 months of the year). The USA & Canada and Germany reported better sales than in 2018 and indeed much better than most of the Southern European countries. Weather of course has been a major influence with late arrival of summer in France and Spain although French retailers reported parking restrictions limiting trade to city centre, delivery delays and aggressive competition from online sales sites through flash sales. Delivery delays were also mentioned in Italy as having a negative effect early in the season.

THE POPULAR CHOICES FOR COLOURS & PRINTS IN 2018

PRINTS OR SOLIDS?

	UK/Ireland	USA/Canada	Germany	France	Italy	Spain	Russia
PRINTS	74%	42%	87%	55%	79%	80%	50%
SOLIDS	26%	58%	13%	45%	21%	20%	50%

Prints are still ahead in the UK but a little down on 2017 (where 83% preferred prints). But in the USA for the first time, solids take prime spot and indeed is the only country in our survey which leans towards solids rather than prints. The German retailers too rate prints high on the popularity stakes (it should be noted however that a lot of sales are in the more 'traditional' stripes or polka-dot designs). Solids gain a bit of ground in France with most popular design in prints being floral or ethnic. Diversity of prints is seen on the Italian market: flowers, graphics, photographic, jungle and geometric. Spanish retailers also like multi prints and a new trend toward more jewelled swimsuit (rhinestone, pearls...). Prints and solids came level pegging in Russia – some areas of Russia prefer a profusion of designs whereas others go for classic, slimming solid colours.

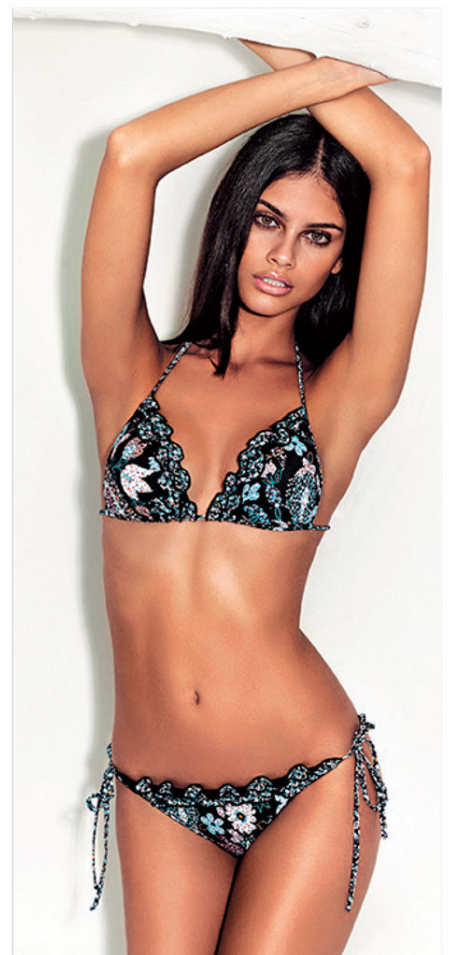
COLOUR TRENDS IN 2018

	UK/Ireland	USA/Canada	Germany	France	Italy	Spain	Russia
1.	Blue	Blue	Blue	Blue	Black	Black	Black
2.	Black & White	Black	Black	Black	Red	Blue	Blue
3.	Black, Orange	Red	Black & White	Orange	Green	Black & White, Green	Red

Blue in all its varieties is still the number one choice in the UK, USA, Germany and France and second choice in Spain and Russia. It is only Italy that does not rate it in its top three, preferring black, red and green variations. And as seen in 2017 orange is still a popular colour choice in the UK alongside with French retailers. Of course black and combinations of black and white are perennial favourites too in virtually every country.

All of the styles featured in this Beachwear Report are from the 2018 Collections.

Lascana – reaches the Top 5 in Germany (a highly successful campaign with Alessandra Ambrosio as face of the brand)



Red Point- appreciated by Spanish retailers for original prints

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MARKETS IN DETAIL

Underlines Magazine interviewed 70 points of sale in the UK and Ireland made up of 83% lingerie boutiques also offering swimwear, in addition to shops specialising in swimwear. Approximately half of the boutiques interviewed sold a maximum of 10 brands.

UK/IRELAND

Bikini v. One-Piece

After flirting with the bikini last year as number one, it is back to business as usual in the UK, which historically has almost always preferred the one-piece. The latter takes over with 54% of retailers, who say it sells best. Probably explained by the demographic that these independent outlets cater to – a slightly more mature customer, who may look for colourful suits or prints but also still normally seeks a little extra help in shaping or silhouette.

Online Presence

Still on the rise and even amongst independent outlets the figure is up to 26% this year. Among those, most (83%) achieve between 10-30% of their turnover online, 17% report more than 30% of their turnover comes from online sales.

Brand Values

Unsurprisingly in an ever-expanding morphology across the UK and Ireland, the 3 more dynamic categories are: larger cup swimwear (offered by 91% of shops) with Freya and Fantasie in the lead; larger curvier swimwear (in 77% of outlets) with Elomi as the clear winner and then shaping swimwear (sold by 71%) with Miraclesuit as the number one choice. Accessories only appear in 25% of outlets and men's or sports swimwear is virtually non-existent (3%). New entrants to bestselling brands are Chantelle, Antigel and in 6th place (not shown) is Israeli brand, Gottex.

Seasonal Favourites

When asked about their favourites, British retailers revealed they have a weakness for Antigel and Empreinte for their originality of style, Moontide for its prints and value for money ratio, along with Pour Moi? and Piha. The Wacoal Group is currently offering stores an excellent retail partnership, following closely by Germany's Anita. None of the retailers felt that there was much advertising that stood out at all at consumer level.

TOP 5 BRANDS IN UK/IRELAND	
1	Freya & Fantasie
2	Moontide
3	Maryan Mehlhorn & Watercult
4	Chantelle
5	Miraclesuit = Antigel



Watercult – gaining ground in the UK

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USA/CANADA

The Best of Swim's annual swimwear survey was completed by interviewing 50 of leading multi-brand lingerie boutiques from the Best of Intima Awards, all of whom have a swimwear offer. Swimwear specialists are not included in this survey as they use completely different suppliers compared with those used by lingerie boutiques.

Bikini v. One-Piece

Close competition between the one-piece and bikini with the bikini just in the lead (54%). Multi-brand retailers have found a novel response to this eternal dilemma: the tankini is loved by Americans and becoming more and more popular, with many thinking it should be given its own category!

Online Presence

Online sales are gaining more ground in North America with a growing number of boutiques offering online sales (38%). What's more whilst last year stores reported that online sales represented less than 10% of their turnover, this year 29% state it generates between 10 and 30%.

Brand Values

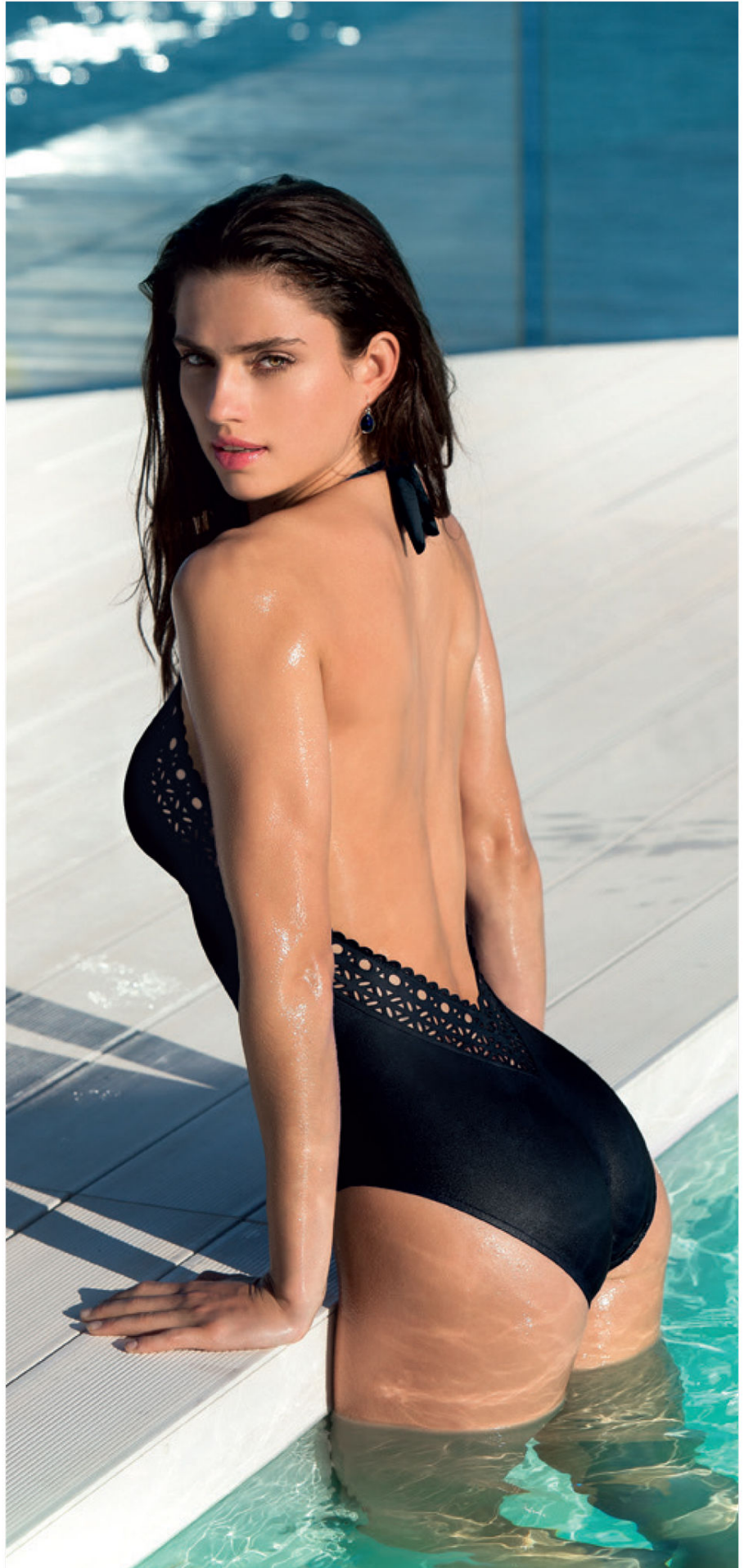
More than 65 brands were actually mentioned but PrimaDonna moved ahead to take first place with the Wacoal Group brands (Fantasie, Freya and Elomi) taking 2nd, 3rd and 4th. Anita moves up a spot whilst Panache Swim slips a place and two new entrants in the Top 5 – Shan and Amoena.

The larger cup size category seems to have good days ahead in North America, being offered by 98% of boutiques interviewed, with reports of increasing sales for 65% of them. Plus size swimwear also represents another key category for retailers here with 76% of respondents stocking it – no surprise that, as with the UK, Elomi is the standout brand. Also on the increase is ready-to-wear beachwear with a slight dip in shaping swimwear. However, the sporty trend continues with nearly 50% offering sports swimwear – brands such as Tyr, Anita, Body Glove, Coco Reef, Dolfin, Dusky, Gabar and Kenneth Cole. Good news for men too with 22% stocking men's swimwear and their most popular brand? Saxx.

Seasonal Favourites

In seasonal preference, PrimaDonna stands out for both its originality and prints with Shan, Freya and Fantasie also recognised. As in 2017 Freya is appreciated for value for money and perhaps no surprise when it comes to client partnership and advertising campaigns, stores selected the Wacoal Group brand and PrimaDonna.

TOP 5 BRANDS IN USA/CANADA	
1	PrimaDonna
2	Fantasie
3	Freya = Anita
4	Elomi = Panache
5	Shan = Amoena



Lise Charmel and sister brand Antigel hold top slots in France but also growing in the UK

GERMANY

SOUS magazine surveyed 70 stores across Germany, interviewing lingerie shops with a swimwear offer (70%) as well as larger multi-brand clothing stores all with a dedicated swim range (30%). 79% stocked fewer than 10 brands, 14% stocked between 11-18 and only 7% offered more than 18 brands.

Bikini v. One-Piece

Even although the one-piece has gained some ground, it is the bikini that is ahead in sales (65%). Bigger cup sizes and shaping swimwear, respectively present in 83% and 61% of sales points, are still strong categories for German retailers with good stable sales (PrimaDonna and Charmline leading the way).

Online Presence

Only 17% offer online sales but this is still up from 2017, slow and steady progress of online shopping in Germany. 80% of those say it constitutes less and 10% of their turnover with the remaining 20% saying it accounts for between 10-30% of turnover.

Brand Values

As to the popular brands, it is Sunflair (cornerstone brand of the Adolf Riedl group) and PrimaDonna of the Van de Velde Group (the only foreign brand in the Top 5) that hold a strong lead. The Maryan Beachwear Group is having great success with two of its brands (Charmline and Maryan Mehlhorn). However it is Lascana that makes a stunning entry into charts for Summer 2018, perhaps something to do with their introduction of Alessandra Ambrosio as face of the brand.

Seasonal Favourites

With over a third of the shops, PrimaDonna is a firm favourite in terms of style, thanks to flattering cuts and good fit. Maryan Mehlhorn makes a splash with their prints, whilst the Adolf Riedl Group (Sunflair, Opera, Olympia and Sunmarin) are to be congratulated for their strong client relationships. The Sunflair brand was also commended for excellent value for money and advertising campaign.

TOP 5 BRANDS IN GERMANY	
1	PrimaDonna = Sunflair
2	Charmline
3	Lascana
4	Maryan Mehlhorn
5	Rosa Faia



Elomi Swim – a big hit in the USA & UK



Shan returns to the Top 5 in the USA & Canada



Seafolly – a brand making further inroads into the Russian market

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Moontide – appreciated for prints and value for money



PrimaDonna – a brand that is popular in virtually every market

FRANCE

Intima France has once again conducted its annual swimwear survey by speaking with more than 70 independent multi-brand outlets (from its Top 100 – Best Boutiques in France). Hailing from the Côte d’Azur to Paris via the seaside resorts of the Atlantic – retailers provide their valuable industry insight.

Bikini v. One-Piece

The reign of the one-piece swimsuit continues in 2018 and confirms its place in the hearts of French women! A must-have for seaside moments, the one-piece edged out the bikini, enjoying better sales in 75% of shops – its many assets including support, comfort and a figure-enhancing effect but not forgetting the wide choice of styles and trendy colours.

Online Presence

Not much evolution on online sales – only 11% of the panel have an online store which generates on average less than 10% of their total sales turnover.

Brand Values

The majority sell less than 10 separate brands but across the panel the best-seller, for the 5th year in a row, was Antigel (a favourite for 36%). Lise Charmel and Pain de Sucre are tied in second, after an excellent season with Maryan Mehlhorn and PrimaDonna closely behind and Charmline and Sunflair tied at 4th.

Beachwear ready-to-wear is sold by 93% of French outlets interviewed and Antigel once again comes out top. The larger cup segment also sells well in swim fashion and PrimaDonna is in the lead with Freya close behind. Larger swim sizes are now stocked by 89% of the shops and Charmline is the most popular brand. For sports which is only stocked by 24%, it is still Anita that is the leader.

Seasonal Favourites

Antigel, Pain de Sucre and Maryan Mehlhorn are all cited for their originality of style. Lise Charmel’s prints were popular (as were those of Seafolly) but in terms of value for money (always close to customer’s hearts) it was once Antigel that won with its quality of fabrics at restrained prices. Lise Charmel is recognised by many as the number one choice in terms of customer relationships and advertising communication.

TOP 5 BRANDS IN FRANCE	
1	Antigel
2	Lise Charmel = Pain de Sucre
3	Maryan Mehlhorn = PrimaDonna
4	Charmline = Sunflair
5	DnuD



SPAIN

As with most countries, Spain had an unsteady start to spring/summer 2018. The bad weather, long winter and political crisis have not been kind to the 72 stores interviewed by CYL Magazine. The stores were dispersed across the length and breadth of the country.

Bikini v. One-Pieces

The one-piece is the undisputed queen of the season – forecast by fashion magazines and eventually realised by Spanish retailers. With bold cuts, worked fabrics and a strong print presence, one-piece styles have won the hearts of Spanish consumers. And with 56% of stores reporting a decrease in sales this summer, for many this fall has only been halted by the popularity of shaping swimwear, plus sizes and larger cups.

Online Presence

Online sales are still growing in Spain, with 79% of the shops offering online sales either through their own sites or through other platforms. Amongst the reasons for this cited by shops, the features that made the big difference were the potential for delivery, the ability to click and collect from store and how easy it is to make returns.

Brand Values

Design, fabric quality and a good fit can make a big difference. In first place this summer is Belgian brand, PrimaDonna, followed closely by Lidea and Xanadu (the top three are plus size specialists). Spanish brands do appear in the Top 5 Red Point being the most popular. The larger cup sector offered by 90% is holding up well (and even increasing in some cases). Customers are willing to invest in these products and brands and it helps retailers stand out from less specialised chain stores. Similarly shaping and plus size swimwear has had good results. Men's swimwear and sporty swimwear are the least dynamic categories of all. One result is that beach accessories are underperforming – present in 30% fewer stores than 2017 and big decreases reported in 32% of those who do store them.

Seasonal Favourites

Fabric details, original prints or an unusual cut make a difference – this year Spanish boutiques have appreciated the originality of Red Point and Watercult as well as the elegance of Andres Sarda prints. In terms of value for money, PrimaDonna gets a thumb up as well as for their strong client partnerships & advertising campaigns.

ITALY

Linea Intima interviewed over 70 top stores from its Stelle dell'Intimo retail competition from all across the peninsula. From north to south, beach towns to big cities, the islands to the lakes – the panel composed of both swim specialists and boutiques carrying lingerie and r-t-w that also offer a large swimwear selection.

Bikini v. One-Piece

With 73% of the panel noting higher sales, in Italy the bikini remains unbeatable, particularly the triangle top, but it is losing its edge over the one-piece models. Fashion and eye-catching and increasingly in demand for use even beyond the beach as a convenient bodysuit for parties, the one-piece is not only a trend but gains new market share with an expanding offer in most shops.

Online Presence

Only 14% offer online sales, unchanged from 2017. Few stores invest in a true e-commerce platform, as most of them prefer social networks as a one-to-one sales channel to showcase products.

Brand Values

In Italy, a country renowned for its 'beach lifestyle', the majority of stores interviewed offer at least 10 brands and a quarter more than 18. The top sellers are concentrated and national brands enjoy the most success in their domestic market. Pin Up stays on top (as per last 5 years) followed by two other specialists in 'Made in Italy' – Miss Bikini Luxe and Raffaella d'Angelo. The only non-Italian brand to rate in top 5 is Maryan Mehlhorn followed by Twin-Set and Paladini.

For 100% beach ready-to-wear is not considered as a complementary product line but is an integral part of the summer offer. Increasingly, 'summer wear' which can be worn on vacation or around town, is often the main sales engine, making it an ideal component for a retailer and it is here where Raffaella d'Angelo, Pin-Up Stars and Twin-Set shine. Accessories such as bags and shoes are virtually everywhere and up to 74% of outlets sell swimsuits with larger cup sizes and indeed plus sizes.

Seasonal Favourites

Indisputable trendsetter of the seaside fashion is Pin-Up Stars with its original styles and unique prints – proof that in Italy, fashion still remains the driving force of swimwear sales – likewise too for Raffaella d'Angelo and Miss Bikini. In terms of value for money, it is Verdissima and Miss Bikini that stand out. For quality of retail partnership it is the Valery Group (which includes Valery and Raffaella d'Angelo). Retailers felt campaigns were not dynamic with the only ones mentioned as Pin-Up Stars, Verdissima and Miss Bikini.

TOP 5 BRANDS IN ITALY	
1	Pin-Up Stars
2	Miss Bikini Luxe = Raffaella D'Angelo
3	Maryan Mehlhorn
4	Twin-Set
5	Paladini

TOP 5 BRANDS IN SPAIN	
1	PrimaDonna
2	Lidea = Xanadu
3	Red Point
4	Anita = Maryan Mehlhorn
5	Basmar = Antigal

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RUSSIA

Intimoda interviewed 50 stores across Russia mostly made up of lingerie boutiques who carry a swimwear offer (94%) with 6% exclusively swimwear outlets. Difficult to evaluate as their season traditionally begins later than Western European markets- early June. There is more stability and less decline in sales. Events such as the fire in the Zimnyaya Vishnya shopping centre and the Kemerovo tragedy both in 2018 has led to tightened security in shopping centres across Russia and led to some store closures.

Bikini v. One-Piece

Looking to soak up every ray of sunshine when it does arrive (!) Russian women continue to favour bikinis, which still has an advantage over one-piece suits. However slowly the one-piece is starting to make more of an impact and customers are tempted to buy both!

Online Presence

More and more stores are venturing into online sales through social media and dedicated sales sites. 44% offer products online and half of those who have been selling online for more than 12 months reported an increase.

Brand Values

Not a particularly wide offer with 46% offering up to 5 brands, 44% up to 10 brands and only 10% offer more than 11 brands altogether. Magistral holds on to top slot, joined for the first time by Seafolly, which has made big inroads into the market in the last 2-3 years. Naturana enters the top 3, recognised for good value for money and established brands, Charmante, Jolidon and Marc and Andre keep their spot.

Almost all retailers offer ready-to-wear for the beach and again Magistral featured well alongside Seafolly, Mia-Mia, Charmante and Spanish brand, Ysabel Mora. 8^5 offer larger cup sizes (and here Naturana performs well followed by Felina, Self, Tribune and Infinity). Plus sizes are significant and the main brand players are Felina, Naturana, Bahama, Gottex, Self and Tribune. With nearly half selling shaping swimwear, the most often cited were Miraclesuit, Felina, Gottex and Naturana.

Seasonal Favourites

Magistral and Seafolly are appreciated for their original style and their prints (and Seafolly reckoned also as good value for money). Others mentioned for value for money were Charmante, Jolidon, Infinity, Magistral and Naturana and excellent client partnerships.

	TOP BRANDS IN RUSSIA
1	Magistral = Seafolly
2	Naturana
3	Charmante = Jolidon = Marc & Andre



Freya Swim – the broad cup size offering makes them a popular choice in the USA & UK

PREDICTIONS FOR 2018

An increased willingness to re-examine product is evident in the UK whether this is a Brexit effect or not, is impossible to judge at this point. A higher level of satisfaction with existing stocked brands is seen in the USA/Canada, France and Spain, but Germany & Italy as in the UK are open to changing or adding new brands. There is a certain feeling of ennui in Spain after a very half-hearted swimwear season so it seems a case of playing safe, at least for now. In Russia there is interest in younger Russian brands and also brands from the Americas (USA, Colombia and Brazil).

BUYING TRENDS FOR 2018

	UK/Ireland	USA/Canada	Germany	France	Italy	Spain	Russia
KEEP SAME BRANDS	43%	50%	44%	51%	37%	78%	32%
CHANGE THE BRAND MIX	14%	12%	39%	21%	47%	8%	24%
STOCK MORE BRANDS	34%	26%	8%	5%	9%	6%	40%
STOCK FEWER BRANDS	9%	12%	9%	23%	7%	8%	4%