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Ca' Foscari  
Dorsoduro 3246  
30123 Venezia

# Lingerie Markets Between Fashion and Functionality A Comparative Study of Italy and Japan

**Relatore**

Ch. Prof.ssa Junko Kimura

**Correlatore**

Ch. Prof.ssa Marcella Maria Mariotti

**Laureando**

Sara Crisnarò  
Matricola 816270

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*With love to my family  
and Matteo*

# Contents

要旨 .....	4
Chapter 1: Introduction.....	6
Chapter 2: Literature review .....	7
2.1. LINGERIE HISTORY.....	7
2.2. LINGERIE MARKET .....	16
2.3. LINGERIE MARKETING.....	23
2.3.1. <i>Traditional commerce</i> .....	23
2.3.2. <i>eCommerce</i> .....	27
2.4. LINGERIE VALUE.....	30
2.4.1. <i>Functional value</i> .....	31
2.4.2. <i>Symbolic value</i> .....	37
2.5. HYPOTHESIS.....	43
Chapter 3: Methodology.....	45
Chapter 4: Case Study .....	46
4.1. LA PERLA.....	46
4.2. INTIMISSIMI .....	49
4.3. YAMAMAY.....	51
4.4. WACOAL .....	53
4.5. TRIUMPH .....	56
4.6. UNIQLO .....	58
Chapter 5: Interviews.....	62
Chapter 6: Conclusion .....	69
6.1. Findings.....	69
6.2. Implications .....	71

6.3. Limitations and Future Research.....	72
Attachment 1.....	73
Attachment 2.....	75
References.....	76

## 要旨

本稿は、女性の下着のイタリア市場と日本市場を検討することを通じて、消費者にとっての下着の意味を国際比較することを目的とする。結論を先取りして言うと、イタリアでは下着はファッションのための製品となったが、日本では下着は機能的側面がより強調されていることが明らかにされる。

第2章は、既存文献の整理を行い本稿の仮説を導出する。第1に、イタリアと日本におけるランジェリーの歴史を概観する。歴史的な普及過程が現在のランジェリーの意味創出に少なからぬ影響を与えていると考えられるからである。実際に、ひとことでランジェリーといっても、それが普及した過程は両国でずいぶん異なることが分かる。第2に、客観的データを用いてそれぞれの国のランジェリー市場を説明する。第3に、企業がどのようなマーケティング戦略を展開してきたのかを議論する。具体的には、ランジェリーの伝統的販売方法としての店頭販売、および現代的販売方法としてのeコマースにおける企業活動を説明する。第4に、消費者にとってのランジェリーの意味を機能的価値と意味的価値概念を用いて説明する。これらの既存研究の枠組みを用いて、本稿が導き出す仮説は以下のとおりである。すなわち、イタリアでは下着はファッションのための製品と見なされているが、日本では下着は機能的製品として認知されている傾向にある。

第3章は、導出された仮説の検証を行うために実施した調査の概要を説明する。2つの調査を実施した。第1にケーススタディ、すなわち事例研究である。事例として取り上げる企業はイタリア企業3社、日本企業3社の計6社である。第2に消費者調査を実施した。イタリア人消費者25名と日本人消費者25名が調査に参加した。

第4章は、ケーススタディの記述を行う。イタリアと日本の企業を比較するのみならず、6社を比較することで、イタリアと日本の特性の一般化を目指す。

第5章は、消費者調査の結果を分析し仮説を検証する。イタリアの消費者はファッションとして下着を購入し利用している。他方、日本の消費者は下着の機能を重視している。

第6章は、本稿の発見物を議論し、インプリケーションを示唆し、本調査の限界を明らかにした上で今後の課題を述べる。

以上

## **Chapter 1: Introduction**

The purpose of this study is to compare two different markets for what concerns lingerie. Italy and Japan are the two countries that will be analysed to understand the main factors that lead consumers to the purchase and how history still influences their choices.

Italian history shows how lingerie was always an important piece of clothes that women used to feel more beautiful and seduce men; it was not just a mere garment to cover and protect private parts but it has become an instrument that helped women to gain confidence and change their role in society.

Lingerie in Japan has a shorter history but relevant as well to communicate how culture influences still young generations that have not removed yet a certain sense of shame that characterized this country compared to Italy.

Today, while in Italy underwear is considered even more important, to be about to become a proper fashion product, in Japan, it is considered from a different point of view. Actually, if Italians prefer aesthetics features to the detriment of comfort, Japanese look for functional and corrective garments that make them feel comfortable and help them to correct their body.

The first chapter of the research is a literature review and analyses lingerie history and the today's market situation highlighting differences in culture, trends and consumers' behaviour. There will be considered 2 values that can be attributed to Lingerie: functional value and symbolic value. The first represents the Japanese market and the second the Italian one.

In the second chapter the researcher will prove what was discussed in the literature review analysing some of the more popular lingerie brands and interviewing directly customers from both countries about their habits and feelings regards lingerie.

Interviews were efficient methods that made clear the differences between the two countries. Italian and Japanese costumers are looking for different features and the big companies respond to the customers' demand offering what they research.

## Chapter 2: Literature Review

### 2.1. Lingerie History

Women's underwear throughout history has caused them to be flattened, conformed, moulded, plumped, squeezed in and pushed out. Lingerie's purposes include altering a woman's shape, meeting hygiene needs and preserving her modesty. The term "lingerie," derived from the French word "linge" meaning linen, was first introduced into the English language as a euphemism for scandalous undergarments. Its extensive history consistently shifts gears between feminine and masculine as well as painful and practical. From the laced corset "wasp waists" and hoop skirts of the Elizabethan Era to modern day Wonderbras, lingerie has helped define what it means to look beautiful and reveals women's changing role in society. <sup>1</sup>

What happened in Italy the last fifteen-twenty years in the lingerie division? In a word, it became fashion. This term doesn't just define the last trend but it refers to a social phenomenon that helps us to show who we are and depict our personality in the terms of visual information.

From simple and traditional underwear sold moreover in haberdasheries and department stores, it changed into a more sophisticated and innovative piece of clothing that gained personality and captured the attention of stylists and important companies.

Through the centuries, lingerie has always played an important role, not only covering private parts but also helping women creating their personality and giving them self-confidence. In fact it was a women's instrument to highlight particular parts of body to attract men and wield their appeal on them.

Did lingerie play the same role in Japan? Did Japanese women use underwear to model and show their body as Italian women?

Japanese history shows another aspect of women's personality reflected in the role that they assign to clothing. Underwear was introduced in Japan very late with the Westernization of the Country and the only purpose was to cover private parts. So

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<sup>1</sup> Ewing Elizabeth (1976). *Underwear: A history*. New York: Theatre Arts Books.



Lingerie has followed two completely different courses and was considered in different ways influenced by different cultures and traditions: public against private, shown against hidden.

The first record of lingerie comes from ancient Egypt around 3000 B.C. and Europe adopted Egyptian fashion and transformed it shortly after (Ewing 1976). Women in classical Greece wore only a simple piece of cloth with no hemming or sewing, ankle long open on one side or on both, clearly exposing a woman when she walked. They also wore the *apodesmos*, or *strophian* to bind down and flatten the breasts. The Romans followed Greek fashion closely. For both the Greeks and the Romans, underclothing was designed for function vs. fashion. During Medieval times, a chemise was worn next to the skin to protect clothing from body oils and provide a layer of warmth. Women typically wore a chemise under their petticoats. Fashion in Medieval Europe concerned itself with fitted clothing that followed the shape of the body. Women began wearing stiff linen under their bodice called *a cotte*, a garment that flattened the breast. The earliest corset appeared when women used paste as stiffener between the two layers of linen to create a stiffer, harder bodice. Women did not wear underwear during this time, only men wore trousers. Trousers were considered a symbol of male power and women who wore them were typically wives attempting to seize authority over their husbands.

The mid- and late-1500s brought farthingales, hoops worn under skirts to support them into desired shapes. Some Elizabethans wore a “bum roll,” around their waist and under their skirt to accentuate the waist and make the hips appear smaller. A prototype of the corset first appears in a 12th century manuscript but was officially introduced in the late sixteenth century when women began inserting rigid materials such as whalebone into the “busk” (a slot down the centre front of the corset) of cloth bodices.

Women’s lingerie was revolutionized in the late 1700s during The French Revolution. Women shunned petticoats, corsets, and camisoles, and all symbols of French aristocracy including their conforming underwear, were largely discarded. Breasts became the focus and the “un-corset,” a type of corset without

stiffening designed to push the breasts up and out, emerged. Panties first appeared during this time highly advocated by Catherine de Medici.

The Restoration rediscovered the corset introducing some novelty especially for the shape and the invention of the “*à la paresseuse*” hook system, literary it means sluggish. It consists in an elastic lace hooking and made possible for women to dress and undress without maids’ help.

Cadolle, a company of Buenos Aires, invented the first brassiere. Presented before the First World War, it was totally forgotten until the post war, when it made the comeback. Early 20th century brassieres were comfortable and gave a natural separation between the breasts. As women in the early 1900s participated in more sports and vigorous dancing, they began to abandon their corsets in favour of the more practical brassieres. Women were striving for a more streamlined almost boyish figure. Fashion broke through lingerie with Chanel and Poiret that recreated the woman image through tight and banded bras. In the nineteenth century corsets were also a sort of shell protecting women’s chastity and the twilight of the corset marked the end of the era: woman sexuality started to become more explicit and direct.

During the First and the Second World Wars, fashion evolution came to a standstill but at the end of the 1940s a new attention at woman’s body and femininity stood out.

The 1950s brought the hourglass figure back with a bang. The bra had solidified itself in every female’s wardrobe and had taken on amusing and extreme shapes due in part to the film industry. Sophia Loren, Gina Lollobrigida, Anna Magnani are few examples of well-endowed women that set the trend in those years: elegant looks characterized by laces and transparencies. On the contrary, in the 1960s and 1970s the image of a skinny and sophisticated woman was established. Garter belts and stockings disappeared and made space for tights: breast lost its primacy and long and skinny legs came to the fore.

By 1980, cleavage made a return and the development in technology did what nature couldn’t do for women who weren’t fortunate enough to be self-endowed. Mass-marketed lingerie gave a push and plunge effect, resulting in desirable cleavage. There is the comeback of luxury with corsets, garter belts and stay-up stockings, laces

and ribbons for a very provocative look. Women's underwear has undergone various stages of design and transformations to become what it is today. Lingerie has made several statements throughout its history from reflecting a woman's social status to a symbol of sex appeal and now it is beginning to set itself as clothes' accessories.

If from one side we can assert that aptitudes, desires and needs for a certain product concern woman's nature and identity, they are also the result of costumes and traditions of a specific society and the effect of historic and social tradition settled in the time.

Analysing the Japanese traditional underwear there is the 長襦袢 *nagajuban* or the 肌襦袢 *hadajuban*. In the past, underwear in Japan had the functions to cover the body, keep warm, protect the skin and protect the body from the dirt of clothes such the sweat. In the West, underwear has also other functions such as shape the body through corsets and brassiere. Nowadays, what catches the interest is not the fact that Japanese women are used to wear underwear in the daily life but it is the sexual shame that they feel regarding underwear. In Japan, until the Meiji period, second half of the 800', the idea of covering genitals with pants didn't exist. The functions of underwear were only to cover the body and keep warm and protect the skin from the dirt of clothes.

Ueno (1989)<sup>2</sup> asserts that underwear has also two other functions. The first one is the sex appeal on men. Covering genitals, underwear excites the imagination. The hidden private parts are view as something charming. This is because imagination is richer than reality. Another function, according to Ueno, is the women's narcissistic image. Buying underwear, women satisfy their narcissistic self-image. In this way, we can say the men and women appreciate for two different reasons the charm of lingerie. What kind of undergarments Japanese women wore before the introduction of the western style underwear? Aoki (1991)<sup>3</sup> reported that *Koshimaki* 腰巻, a sort of skirt wrapped around the waist used under the kimono, start do become popular after the

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<sup>2</sup> Ueno Chizuko (1989). *Sukato no shita no gekijō* (The theatre under the skirt) Tokyo: Kawade Shibo Shinsha

<sup>3</sup> Aoki Hideo (1991). *Shitagi no ryūkōshi* (Fashion history of underwear) Tokyo: Yūznakaku.

end of Medieval period. Before the *koshimaki* women wore a undergarment called *mo* 裳 and under that, another garment called *hakama* 肌袴. However, Japanese summer is hot and humid and the use of these two undergarments became unsuitable. Therefore, women casted them of and started to wear another garment called *koshimaki* or *yumaki* 湯巻. During the Kamakura period, the low class court ladies started to wear the *koshimaki* instead of *hakama*. During the Warring State period also the women of the samurai's upper classes get used to wear it during summer. During Edo period women started to wear it when they took a bath. The last use of the *koshimaki* gave birth to a second type of *koshimaki* used for the bath.

Drawers are a type of undergarment introduced in Japan during the Westernization movements of the Meiji period. The drawers' diffusion took place with the intensification of the circulation of the western culture and life style, including clothes. The first time drawers were worn in Japan it was during the Rokumeikan's period<sup>4</sup>. Women that haunted the Rokumeikan started to wear bustle, very popular in Europe, and drawers. However, they were a very little part of the high society and among the population drawers were not diffused at all.

Also outside the Rokumeikan there was no contact between the upper classes where women got used to wear western clothes, including drawers, and the lower classes. We can therefore understand that in the Meiji period western clothes were not really diffused, only among a particular part of the upper society.

The Taisho era (1912-1926) was a transitional period to western clothes and not only the élite could afford them but also the rest of the population. Western clothes gained more popularity due to the introduction of uniforms at girls' schools, and female empowerment, resulting in women tapping into the world of business. Western style clothes were preferred as they offered women more mobility. Thus, drawers became more common among women, but after long time wearing *koshimaki*, women still did not feel comfortable with a tight garment around their private parts. Another fact that helped the diffusion of western clothes was the Great Kanto earthquake of

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<sup>4</sup> The Rokumeikan (鹿鳴館) "Deer-cry Hall" was a large two-story building in Tokyo, completed in 1883, which was to become a controversial symbol of Westernisation in the Meiji period.

1923. The semi-governmental organization, alliance for the improvement of living (生活改善同盟会 seikatsu kaizen dōmei kai) called out: “Outside, the drawers” (「外出には、ズロースを」). It was hard to get used to wear drawers for the sensation caused by the fabric thigh to the private parts but from this moment they became always more popular nevertheless. Thus, in the Taisho era, the use of western clothes and drawers increased even if it took long time to get use to them.

During the Showa era (1926-1989) happened a legendary accident that is believed to have triggered the era when Japanese ladies starting to wear modern underwear: Shirokiya department store (白木屋百貨店) fire disaster.

Nihonbashi, Tokyo, December 16, 1932: a massive fire breaks out on the fourth floor of Shirokiya, a popular department store, a high-rise building with eight floors above the ground and two underground levels. The fire broke out in the toy section located on the fourth floor and blared up all the way up to the eighth floor. The death toll amounted to fourteen, eight of them wundieomen, who died by falling from the sixth and seventh floor. It was the first fire disaster in a high-rise building in Japanese history. Many Japanese associate the Shirokiya department store inferno with female underwear. The staple garment for women back in the 1930s was still the kimono. Underneath, women just wore the *koshimaki*, wrapped around from their waist down. Although *koshimaki* were nothing equivalent to modern Western-style underwear, their private parts were not totally naked. It was reported that in the Shirokiya department store fire disaster due to their sense of shame, female workers in the midst of disaster would rather plummet to death than disgracefully show their private parts to curious onlookers on the ground. Learning a lesson the hard way, Japanese women picked up the practice of wearing undies. That is how most of the people believe female underwear was introduced to Japan. This is a mere urban myth, counters Professor Shoichi (2002).<sup>5</sup> According to him, the female workers at Shirokiya's were escaping from the disaster by the skin of their teeth. They simply could not afford to pay attention to curious spectators. He argues that women back then were used to publicly exposing themselves, so that they must have been quite

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<sup>5</sup> Inoue Shoichi (2002). *Pantsu ga mieru. Shūchishin no gendaishi* (My panties are visible. The history of being ashamed). Tokyo: Asahi shinbun.

insensitive to onlookers. There is also another fact that proves that the increase in using underwear is not related with the Shirokiya's accident: after the disaster persons that started to wear drawers were only 1%.

In 1939, when World War II broke out, *monpe* (もんぺ), loose trousers with a drawstring around each ankle, were promoted for women. Since they could not wear *koshimaki* under these trousers, women had no choice but to wear drawers. Thus, the ratio of underwear usage dramatically increased among women. However, when the war ended, Japan went into extreme poverty, and the only women who could afford to wear drawers were "pan pan girls", prostitutes consorting with the occupation troops, and the image of drawers turned into something sleazy, radiating the image of sexual promiscuity.

The drawers that started to become popular as a result of the Westernisation are far from the modern idea of underwear. In the mid 1950s, Japan pulled off its post-war economic miracle. In the wake of the economic rise, a veritable underwear boom epitomised by the iconic panty set in. Due to the shortage in textiles, women who so far could only care about their outer fashion now could afford to spend more money on their "inner fashion" as well. Fashion shows specialised in undies were ubiquitous, and underwear sections in department stores expanded. Behind all this, were the start of private broadcasting, the development of modern media, and also the emergence of the fashion industry, with lingerie pioneers such as Wacoal Corporation. Modern underwear had finally taken off. Since at the beginning pants were worn by woman with an occupation that had to do with sexuality and shape, texture and colours gave a sexual impression, normal women started to identify them with sex and infidelity. However, shortly also normal women started to desire to buy those pants exposed in the shops.

Thanks to the underwear boom, several items appeared on the market. First of all, coloured underwear became popular and there was a huge step from the period characterized by white pants. Representative models are the weekly panties (ウイークリーパンティ) and paper pants. Miniskirt and panty hose became popular as soon as

they arrive on the market. <sup>6</sup> Miniskirt arrived in Japan in 1967 and caused uproar. Due to the miniskirt trend, the sale of panty hose exploded. With regards to stockings, the main stream was the garter stocking. To avoid that the stocking fall down, women used the garter.

In this way, smaller pants swept through Japanese market and also Japanese women started to wear modern pants.

One of the aspect that catch more attention about the relation between Japanese women and underwear, is the physical sham related first to the private parts and then to the pants.

At the time when Japanese women didn't wear undergarments, they use a piece of cloth, *koshimaki*, to cover the lower half of body. In this way, it happened often that genitals were exposed to people's eyes. On the way back from their groceries, when caught by a gust of wind, most women rather held tightly onto their shopping bags than clasping the bottom of their kimono to avoid it being lifted. Also, it was a common to see women clad in kimono casually stepping over someone lying on the floor. Even, up until the beginning of 1960s, in farming villages, women were working on the fields with their kimono gathered up around their waist, and people often saw them urinating standing on footpaths between the rice paddies in bright day light. From these stories we can conclude that women back in the days of *koshimaki* clearly did not have the same level of physical shame as women nowadays. They seemed to have accepted self-exposure as an inevitable daily practice.

Once Japanese women started wearing underwear, a stronger sense of physical shame evolved. Once covered by underwear, their awareness of private parts gradually increased, according to Professor Inoue. And the Japanese government played a great part in this as well. After World War II, the government campaigned for women to wear underwear in order to uphold their chastity. When these national efforts started to take effect, the number of women wearing undergarments increased. The concept that private parts should be hidden from people's eyes became commonplace. Hence, shamefulness women felt when their private parts were visible

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<sup>6</sup>Aoki Hideo (1991). *Shitagi no ryūkōshi* (Fashion history of underwear) Tokyo: Yūznakaku.

increased, although a sense of shame in regard to underwear being in plain view of others had not yet developed. This was because an intricate understanding of Western-style underwear disseminated much slower than the knowledge of how to behave when clad in Western clothes. Japanese women were unfamiliar with how to comport themselves in a way, so that their underwear was not visible. On top of that, since Japanese women around this time were feeling liberated by wearing Western clothes instead of constrictive *kimono*, their "footwork" was slightly unpolished, so that people found women sitting on the train with their knees wide open. In the late 50s, the underwear boom swept Japanese women into the panty era. Women started to realize that underwear should be hidden in skirts. What changed the female mind-set was widespread westernization ingested in classes at dress making schools, through manner books, the behaviour of Western ladies visiting Japan, Western movies, etc. Japanese women had been shaped by Western concepts of demeanour and style. This is how Japanese women's sense of physical shame developed: not because they were disinclined to exposure, but because they started hiding their private parts by adopting Western-style underwear. In the same fashion, once underwear had become common practice, Japanese women started develop a strong sense of shame about displaying their underwear.



## 2.2. Lingerie Market

According to Cherubini (2007)<sup>7</sup>, Italian women, after American, are one of the more regular visitors of lingerie shops in the world. Bras, corsets, body and branded pants are items that satisfy women's femininity and men's imagination. Producers take advantage on these feelings and compete on the lingerie market thanks to sexy commercials and beautiful endorser from the cinema and the fashion world.

Inside the definition of underwear there are a variety of commodities category completely different from each other and directed to patchy targets. For this reason it's difficult to consider lingerie market in its totality and there is the disposition to divide it into parts. The first main division is woman and man underwear for two reasons: one is economic and the other is strategic. Woman underwear represents the biggest part of the total market, more than 70%, so it is the most desirable target segment; furthermore it's better to separate woman and man market because shopping experience and consumption are totally different in the two segments.

Segmentation criterions commonly used for woman underwear are based on use occasion: day underwear (89,6%) and night underwear (10,4%). Day underwear consists in undervest, top, bra, pants, knickers, G-string, petticoat, corsets etc. and night underwear consists in pyjamas, dressing gown etc.

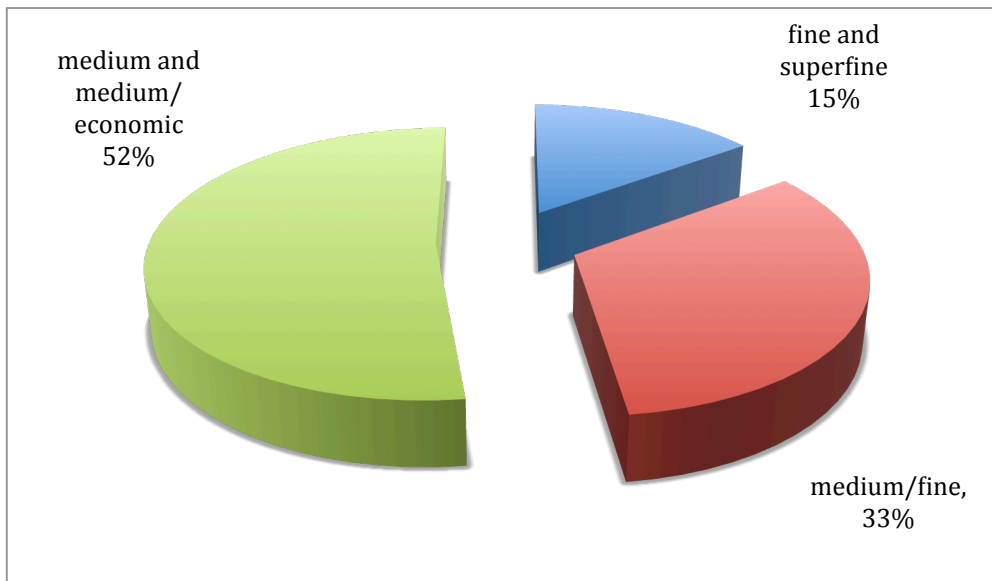
Based on consumer target, price, and quality, we can identify three market ranges with different strategic importance:

- 1- Fine and superfine range: high price and quality;
- 2- Medium/fine range: price and quality are in line with market's average;
- 3- Medium and medium/economic range: low price and quality.

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<sup>7</sup> Sergio Cherubini (2007). *Casi di Marketing. Volume 3*. Franco Angeli

**Figure 1: Lingerie market ranges.**



Source: Databank, April 2005

There are significant differences between targets of different ages. Women over 40 years old are basically more conservative, have a preference for white than coloured products, predominantly don't choose underwired bras, are inclined to research functional benefits (comfort, support), are faithful to a particular brand or a model. On the contrary, young consumers go in for products used as clothing to "show". However, a more accurate segmentation shows how complex is the variety of attitudes/behaviour toward underwear. The U&A<sup>8</sup> study based on 1945 Italian women aged between 15 and 70, provides us precious information:<sup>9</sup>

- On the average a woman purchases 2,9 underwear suits every year: this number increase for young women;
- Consumers are faithful to a group of known brands rather than a specific one;
- 53% of purchases are moved by impulsivity, only 25% of purchases are moved by necessity and 23% for special occasion.

Underwear industry is changing also from the point of view of distribution that is increasing in importance as time goes by and its traditional form of organization, independent retailers, is slowly leaving space to national and international giants.

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<sup>8</sup> Usage and Attitude: study periodically conducted by Sara Lee Corporation

<sup>9</sup> Sergio Cherubini (2007). *Casi di Marketing. Volume 3*. Franco Angeli. p.49

Italian distributive structure's transformation has accelerated the change of the role and the power of commercial brokerage that intervenes more and more directly with its own product-market strategies. On the contrary, producers chose a major control on the distribution as an instrument to monitor the market in real-time<sup>10</sup>.

**Table 1: Distribution channels**

Sale channels	Market (Value)
<b>Retail</b>	47,4%
<b>Street markets</b>	18,8%
<b>Specialized chains</b>	14,3%
<b>Mass market</b>	10,0%
<b>Variety stores</b>	3,8%
<b>Department stores</b>	1,0%
<b>Other</b>	4,7%

Source: GFK, December 2005.

As shown in the table, despite the evolution of the system, the most important channel remains the retail (specialized shops, boutique, haberdashery) with 47,4% of the market value. Mass market (hyper-market, super-market) represents about 10% of the market and other channels including street markets and specialized chains make the rest of the sales. Specialized chains became more popular year after year and their success is based on strong brand policies that paly on the role of the sale's point: layout, merchandising, exhibition mode, colours. This strategic approach has permitted franchising chain (Intimissimi, Goldenpoint, Intimo3) to take a significant share of the market away from the traditional distributive channels.

Articles of clothing and accessorises are durable goods with high unit value that should satisfy the fundamental need to dress up but also a complex mixture of different needs related to the self image both as a individual and as a social person. Therefore, consumer is disposed to do an enormous investment in terms of time

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<sup>10</sup> Source: Databank, April 2005.

looking for the most appropriate product, visiting various shops and buying offers in terms of quality, price and style.

Informalwear and underwear products appeal strongly to Italian consumers for a plurality of factors<sup>11</sup>:

- Advertising effect (commercials, fashion shows, events), especially to young target;
- Spurs coming from the fashion industry in terms of colours, models, new materials;
- An higher sensitivity in regard to brands;
- The new concept of underwear, especially among young consumers, as something to show.

Consumer that shows scant regard for fashion products assigns his own consumption demotivation to the following factors:

- Saturation of the sector and so the research of new status symbols;
- Economic crisis;
- Slight interest.

Customers' expectations were investigated starting from three principle strategic factors:

- Product: it should be innovative, fashionable, beautifully finished, exclusive and durable in terms of fashion content, both for materials and models, rich of style and able of enhancing the person;
- Store: the principal characteristic is its specialization, both in terms of organization-space and sale assistants;
- Investment: consumer prefers to spend less for a product with high fashion content and spend more for a classic, sober and durable product.

Masaaki Sakaguchi is the president of the Synergy Planning Co. Ltd of Tokyo and he is a well-known apparel and textile industry expert. He has a wealth of experience

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<sup>11</sup> Laura Colagrande (2003). *La scommessa dell'intimo. Tendenze emergenti e prossime sfide dell'underwear: dalle strategie vincenti delle marche di successo ai punti vendita*. Franco Angeli

in merchandising and he carries out marketing guidance activity for important Japanese groups and governmental agencies. His research on the situation of Italian fashion in Japan shows some key factors that explain the economic and financial crisis that hit the sector: these factors are related to a sociologic aspect and the distributive system. Japanese customers, in every social range, are extremely fascinated by qualitative aspects and luxury that characterize the product made in Italy and they are always looking for innovation. For this reason, Japanese demand meets easily the supply of our industry and it's very sensitive to communication that surrounds products and brands.<sup>12</sup>

Before the crisis, Italian branded products were bought by most of young people to follow new trends. Today, only wealthy customers can afford these niche products and the luxury market is not profitable like in the past.

The Japanese addiction to Western luxury fashion brands arose in the 1960s and 1970s with the extraordinary economic growth of the country, and the resulting rapid expansion of the new middle class that wanted to show off their success.<sup>13</sup> In Japan and across much of Asia making money is only part of an individual's success. To gain social stature they have to let the world know that they have it: this is the 'conspicuous consumption'.<sup>14</sup> For this reason luxury fashion brands became modern symbols used to redefine individual's identity and social position. The paradox in Japanese society however, is that the Japanese are aggressive conspicuous consumers but they never show off. This is because conformity is imprinted into them from childhood. The guiding principle behind conformity is the creation of harmony. The natural corollary to conformity is that they stop thinking for themselves and adopt neatly packaged concepts.

The only way to shine in Japan's egalitarian society is by demonstrating a superior 'savoir faire'. For this reason Japanese consumers are amazingly diligent

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<sup>12</sup> Laura Colagrande (2003). *La scommessa dell'intimo. Tendenze emergenti e prossime sfide dell'underwear: dalle strategie vincenti delle marche di successo ai punti vendita*. Franco Angeli

<sup>13</sup> Dana Thomas (2007). *Deluxe: How luxury lost its lustre*. London: Penguin.

<sup>14</sup> Thorstein Veblen (1899). *The theory of the leisure class: an economic study of institutions*. New York: Penguin.

readers and followers of luxury fashion magazines. Showing off is done in a very subtle way, through the sophisticated use of up to date fashion knowledge. However, even if in the western countries innerwear started to be considered as a fashion product, in Japan is still a private matter.

The medium-low range of customers doesn't have particular needs or claims and since they have standardized taste and style, they get easier satisfaction from a globalized market. Furthermore, Japanese customers pay a lot of attentions to information flows and follow with extreme volubility new trends according to received communicative inputs.

From the distribution point of view, Sakaguchi emphasizes the fact that products that are made in Italy have a good image in Japan, but Italian producers should concentrate more their attentions on distribution channels. In Japan sales are organized through large retailers and department stores and Italian fashion products are sold by few specialist. Recently a new reality appeared on the Japanese market: 100 yen shops, factory outlet stores, select shops and recycling shops, fashion shops with selected products that aim at young customer target. These different categories of store have in common the characteristic of skipping one level in the distribution's chain: the wholesaler. This makes possible more competitive prices, removing the sum of profit margins for final clients. Most of Italian producers created shop-in-shop inside this reality, expecting the great distribution to generate high sales. Actually, after a first moment of high profits, these expectations felt let down.<sup>15</sup>

The development of the luxury market was supported by department stores in Japan. Many top Western brands sold their merchandise in Japan mainly through department stores (67.5%), although also through their own stores (16.2%), and other sales channels such as outlet stores and duty-free shops (16.3%).

Japanese producers gradually saw their market share decreasing due to the increasing of importations and they offshored their activities in China. Nevertheless, their strength remains the continuous research in the synthetic fibre field and a larger

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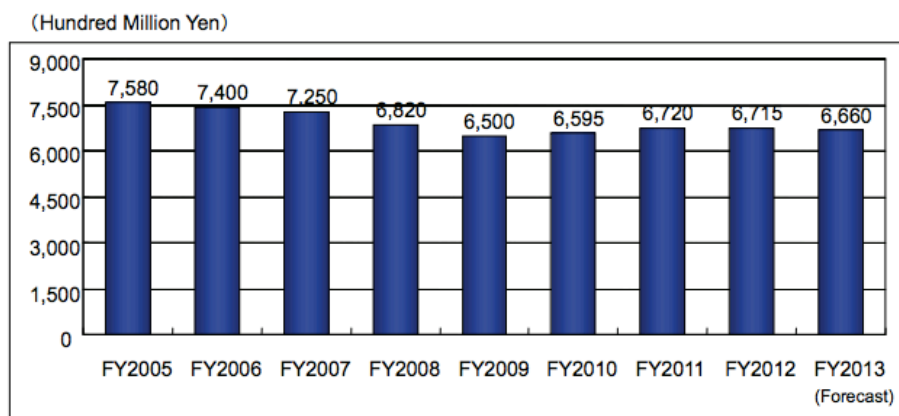
<sup>15</sup> Laura Colagrande (2003). *La scommessa dell'intimo. Tendenze emergenti e prossime sfide dell'underwear: dalle strategie vincenti delle marche di successo ai punti vendita*. Franco Angeli

knowledge of Japanese women's body that in the last years, thanks to new dietary habits and life style, was subjected to evident changes: today Japanese women are taller, with an ampler bosom and larger hips compared to the past.

Lingerie market in Japan has interesting opportunities and maintains an evolution nature that goes hand in hand with the increasing of attentions for their own well-being. Consumers became confident with their body, open to new trends introducing garments made by lace, with a plunging neckline. Cups and padded bras are amply used and favourite pieces are push-up for bras, hip-up for hips and slip-up for the buttocks.

Japanese innerwear market marked four consecutive years of growth, attaining 273.5 billion yen in 2012, 100.2% of the previous year.

**Figure 2: Transition of size of women's innerwear market**



Notes:

1. The Figures are based on the retail amount.

Estimated by YRI

The market in 2012, however, barely exceeded the size of the previous year, seemingly indicating the end of quantitative expansion of functional innerwear that had long driven the entire innerwear market. This market status is likely to encourage the innerwear stores to review their products and sales floors, and to consider promoting other products.<sup>16</sup>

<sup>16</sup> Yano institute (2013). *Innerwear/Leg Wear Market in Japan*.

## 2.3. Lingerie Marketing

### 2.3.1. Traditional Commerce

With the achievement of impulsive purchase, the role of sale's point became prior to represent a specific world of reference for the final consumer leading to the purchase.

Modern client is a woman that has matured a high level of self-consciousness and a better knowledge of her own needs and this is reflected in the product's method of selection and choice. Underwear purchase lives up more and more to cultural and psychosocial needs' satisfaction instead of material needs. Large retailers noticed these changes in consumers' attitude taking consequent measures to make purchase more pleasant and enjoyable and played on these components, leading customer to buy a product even if she already has it.

Modern client has learnt how to appreciate a new way to present products, display bands and communicate ideas, so she became sensitive to new selling methods and assigns value to the store not just as a place of sale but as a place that can create atmosphere and evocate suggestions. A concept-store suggests a theme and drives also psychologically the client through the purchase course.

In Italy the distribution of clothing's articles and accessorises took place through two main channels: traditional shops (about 55% of sales) and the modern organized distribution (department store, national chains of store, variety stores, hypermarket; about 30% of sales).<sup>17</sup> Remaining sales are sold in street market, factory outlet and by mail orders.

Modern distribution is different from traditional retail for the type of service offered to the client. In a traditional shop, assisted sale still remains; on the contrary, the modern distribution system offers self-service. Another characteristic that distinguish the modern distribution from the traditional one is the typology of sale point: vast area and different divisions dedicated to each product's category.

Gehlhar (2005) stressed the importance of retailers and what retailing path to

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<sup>17</sup> Centro di ricerca Luigi Einaudi-Sisim (2000). *Un Commercio a due velocità*.



be chosen. The authors therefore found it interesting to examine how the path chosen affects an invisible brand and if it will influence the brand value. To reach the customers through department stores is advantageous due to the prestige, exposure, and sales volume they can provide, since the relationship with them strongly can reflect the sales. Having a close relation with the retailer could also be a good competitive advantage. Department stores are really focused on sales volume and if the product is not selling well, the risk of dumping the item is high. Therefore it is important to be consistent with the relationships and work hard. The choice for new designers should be more focused towards small boutiques and work with them until the brand or product is well established. Small boutiques are more flexible regarding delivery and they are also helping to share the risk. In smaller stores the owner is usually the buyer, he/she often knows the customers and could purchase goods especially for them. A good relationship with a smaller store is a good way to reach the market at a first phase. It has challenges though: the process of finding the right stores and the need of serving them all separately could be a problem. Since smaller stores are less known compared to department stores, the turnover is not as high and they could be seen as uneconomic risk.<sup>18</sup>

The physical store, with a particular location and atmosphere, is one of the most direct and powerful forms of advertising. It can become a form of communication more effective and easily remembered by customers and a marketing tool that more than any other has the ability to retain them. For this reason, it should be the subject of a precise reflection of marketing, conjugated to the creative act. The global vision of the store must be integrated and consistent with the values and the communication strategy of the brand it represents. The point of sale is the first of the "media" with which the consumer comes in contact. Clothing boutiques, especially of underwear, are one of the funniest places for women. The fun lies in touch, feel, look, soak up the atmosphere created by the store, where the first impression that the customer is

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<sup>18</sup> Gehlhar Mary (2005). *Fashion designer survival guide : An insider's look at starting and running your own fashion business*. Chicago: Dearborn Trade, A Kaplan Professional Company.

looking for is intimacy. The visual merchandising can be a valuable help in the development of a game of memories and emotions.

In a shop that sells lingerie, a good deal of attention is given to the dressing room. This should be like a small living room, bright and spacious, with large and well-placed mirrors, pleasant and comfortable. In fact, customers experience innerwear purchase with the same pathos with which they are buying a prêt-à-porter garment. Fitting becomes essential because you need the space required to undress and move freely.

**Photo 1: Intimissimi store**



Source: <http://www.pentasystems.it>

Intimissimi, an Italian innerwear brand, offers spacious, tidy, bright, and accessible locations, with stores in almost all major commercially high-density routes in Italy. The atmosphere of the shop is warm and clean, thanks to the use of light wood furnishings and wall colours, always strictly cream. Floors range from white marble to parquet, to further heating the environment. Spotlights illuminate the ceiling and the interior of the store, giving it a bright light. Paintings with wooden frames or light panels on the latest collections. Music accompanies shopping in Intimissimi in a relaxed, informal but carefully studied atmosphere to meet the needs of its customers. The store consistently reflects the characteristics of the product and always attracts a

large number of consumers that even if they do not have to buy anything, come in with pleasure to take a look.

**Photo 2: La Perla store**



Source: <http://balharbourshops.com>

La Perla, is another example how to communicate through the store the value and the marketing strategy of the company. La Perla prefers a unique, refined and elegant approach. The floor of its stores is usually marble or parquet, the products are set on glass shelves and illuminated by the light radiated by reading metallic lamps arranged in groups of two or three, and leaned towards the products. The walls alternate with porous surfaces to smooth and sometimes shiny surfaces, reflecting the lights and colours of the collections. A game of very large panels, reminiscent of the mood of the advertising campaigns, and some large mirrors, fill in the spaces of the boutique. There are few products on display, the exclusive prêt-à-porter articles are placed in the foreground while the rest of the merchandise is kept in linear and elegant drawers; other products are contained in boxes of glass supported by metal elements, which can assume the function of shelves. The show-windows are very simple and refined.

### **2.3.2. eCommerce**

Due to the increased popularity and availability of Internet access many traditional small business are considering eCommerce as a valid and profitable sales channel.

eCommerce, online commerce, uses e-marketing to reach potential customers. There are two forms of eMarketing: push-marketing and pull-marketing. Push consists of sending out emails and magazines, as well as posting online ads on various websites. It is pushing information to the people. Pull-marketing is having a website where customers seek out information about your products. Social marketing is also used in pull-marketing.

The buying and selling is similar to the traditional mail order catalogue method, except that orders can be performed online from a website. The business' sales department posts a Web site with an online catalogue. The buyer then selects items from the online catalogue and makes the purchase, either online or by phoning or mail order. A valid credit card is required to make a purchase.

Although the buyer is really using an online catalogue, the metaphor of browsing a store with a shopping cart is often used in e-commerce. This allows the customer to put items in the shopping cart to hold until checkout or when the purchase is finally made.

However, eCommerce and traditional commerce are very different, and it's important to weight carefully the differences. Selling from a company's own homepage, combined with using other already existing sites, is a good way to reach a wider market. Following up the sales is an advantage, since the firm could track exactly where the products were delivered, as well as knowing where potential returns were made and why. Doing this, gives the designer or the firm that are producing the goods, a chance to meet the customer directly, leading to a possible higher margin.

Traditional commerce is often based around face to face interaction. The customer has a chance to ask questions and the sales staff can work with them to ensure a satisfactory transaction. Often this gives sales staff an opportunity for

upselling, or encourage the client to buy a more expensive item or related items, increasing the shop profits. On the other hand, eCommerce doesn't offer this benefit unless features such as related items or live chats are implemented. With an online shop you can do business with anybody living on a country you are able and willing to send mail to, unlike traditional commerce where you are restricted to people who actually come to your shop. This also opens the door to many other forms of marketing that can be done entirely online, which often results in a much larger volume of sales and even foot traffic to the store. An online store has no capability limits, and you can have as many clients as your stock can serve.

Almost all the Italian online shoppers (94%) look for information before buying from the web, starting first from the manufacturer website or from the brand's official website (67%), then look for confirmation in the reviews of the experts (57%) and comments of other users (47%). So, word of mouth keeps intact all its value, both for those who rely on the opinions left in the network from those who have already tried the product, both for those who turn directly to their friends (26%) for advice.<sup>19</sup>

Nine out of ten users (89%) inform themselves online about products and brands but the percentage of Internet users who buy online stops at 34%. However, remain entrenched barriers to the purchase that are the result of apparent resistance related to inexperience. Internet users adduce distrust of a buying mode that does not allow direct verification of the quality of the desired product, which then leads to prefer the physical store and the relationship with their trusted seller. In a traditional store, the customer will be purchasing the product in person, which has some benefits for both the customer and the store. The customer will be able to touch and check the items, to make sure they are suitable, and even try them on, which reduces the number of returned items or complaints due to an item not being as advertised on a catalogue or promotional leaflet. The customer cannot use all their senses when buying. The fact that some customers want to have the product in his/her hands before the purchase could be an important aspect that is left out when using the internet as a distribution channel. If the product, when it comes to fashion products, does not fit there is a problem as well, a problem that could have been resolved before the purchase in an

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<sup>19</sup> European digital behaviour study (2013)

ordinary store.<sup>20</sup>

However the possibility to buy online lingerie products in Italy is a support to the physical store. In fact, all the main brands offer the possibility to buy their products online, but this is a plus value that supports the direct selling activity.

In Japan we can find a variety of different online shops that sell underwear without rely on a physical store. Shopping for lingerie online is a great way to find the most variety and the best prices. Popular retailers and online specialty stores offer a wide range of brands, styles, and sizes in one place, providing a hassle-free shopping experience for the customer and ensuring you'll find exactly what you're looking for. The most popular Japanese online store is Rakuten, the largest eCommerce site in Japan and among the world's largest by sales that offers a vast range of product included underwear.

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<sup>20</sup> Gehlhar Mary (2005). *Fashion designer survival guide : An insider's look at starting and running your own fashion business*. Chicago: Dearborn Trade, A Kaplan Professional Company.

## 2.4. Lingerie Value

According to the theory of values postulated by Sheth, Newman and Gross in 1991<sup>21</sup>, the purchase decision is seen as a multidimensional phenomenon that calls into question, with different importance, a set of values: functional, social, emotional, epistemic and circumstantial.

In the time of purchase the consumer is influenced by five values that assume different levels of importance depending on the person. These values are independent of each other but each of them contributes to the formation of the purchasing decision. According to Sheth, Newman and Gross these five values are:

1. Functional value is the perceived value of an asset in relation to its ability to perform its role as functional, utilitarian or physical. The product acquires functional value on the base of the presence of functional attributes, physical or practical.
2. Social value indicates the usefulness of an asset deriving from its association with one or more social groups. The product acquires social value on the base of its association with positive or negative stereotypes of demographic, socio-economic or ethnic-cultural groups.
3. Emotional value: the utility of the product is related to its ability to arouse feelings or affective reactions.
4. Epistemic value refers to the ability of a product to arouse curiosity or novelty or satisfy a desire for knowledge. This property acquires an epistemic value when it is able to make something new and different.
5. Circumstantial value is related to the utility derived from a situation or a specific context in which it is to find the customer. The presence of physical or social antecedent contingencies may increase the functional or social value of the product.

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<sup>21</sup> Sheth Jagdish N., Newman Bruce I., Gross Barbara L. (1991). *Consumption Values and Market Choices: Theory and Applications*. Cincinnati: South Western Publishing Company.

In principle, consumers should maximize each of these values. In a particular situation the customer can make choices selecting some of those value in order to maximize that, or those, which considers more important.

### **2.4.1. Functional Value**

The reason why consumers purchase a product is not directly related to its attributes, but to the benefits generated by its attributes, or rather benefits offer by products that the consumer is looking for and that are connected with generic or specific needs. The company that project and realize products for the market shouldn't lose sight of the capacity to satisfy needs that is incorporated in them. As Levitt (1969)<sup>22</sup> said, when we purchase a drill or its tips, what we are really purchasing it's not those objects but the capacity to make a hole. The message to the companies is that we shouldn't lie to products as such, ignoring to pay attention to signals that point the evolution of needs and technologies for their satisfaction out. Considering the plurality of product's attributes and correspondence between attributes and benefits, we can deduct that in general, products intercept a plurality of needs.

Wacoal, a major Japanese underwear manufacturer, sells many types of functional inner wear, which are reaching new heights of popularity. Wacoal explained why functional inner wear is so popular:

"We released functional inner wear in 2005 with the idea of wearing them not just to correct your body line, but rather to change your whole body with just underwear. This was just when marathons were becoming popular, and metabolic tests were becoming mandatory at workplaces, so there was a heightened awareness of health issues. Based on analyses of over 40,000 Japanese bodies at our Wacoal Human Science Research Center, we developed functional underwear to provide support when walking.

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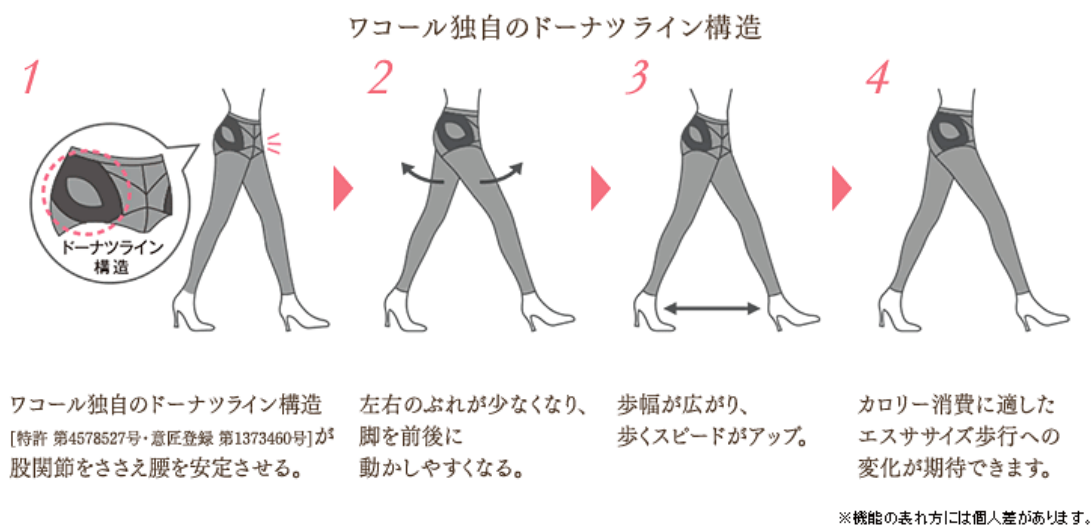
<sup>22</sup> Levitt Theodore (1969). *The marketing mode: pathways to corporate growth*. New York: McGraw-Hill



Their walking support underwear has become their biggest functional inner wear seller. Wacoal's unique construction provides support for wider strides when walking. And for people averse to strenuous exercise, just wearing these shorts will transform your daily walk to work into exercise.

**Photo 3: cross walker's calorie-burning mechanism**

エクササイズシリーズのメカニズム



**Style Science** 「スタイルサイエンス」は、ワコール人間科学研究所から生まれた健康的な生活と美しいからだをめざす商品群です。

■ エクササイズシリーズは「スタイルサイエンス」商品群の一つです。

**【着用の目安】**  
 1日6000歩以上を目安に、はいて、歩きましょう。  
 ※日本人女性(20歳以上)の1日平均歩数=6352歩  
 <平成21年国民健康・栄養調査より>  
 ※パッケージについている「安全に関するご注意」をよく読んでご使用ください。

Source: <http://global.rakuten.com>

**Photo 4: Cross walker pants**



Source: <http://global.rakuten.com>

Features Wacoal's unique "doughnut line" construction, where the side is faintly visible. The main point of this is to support the hips for the right exercise stride. The soft fit makes for a comfortable wear.

Wacoal Corporation has introduced new styles and leg lengths of their groundbreaking: Cross Walker fat-burning weight loss pants for women and men. Though people-watchers on the streets of Japan's major metropolitan centres would be hard pressed to spy anyone remotely overweight or obese, the concept of fat-burning clothing appeals to pretty much anyone regardless of any actual perceived need. According to Wacoal, the revolutionary cross structure built into the fabric of Cross Walker weight loss pants *"will stimulate the muscles of the thighs, and spread it with a natural stride"*. In effect, you're exercising while not actually exercising - that's bound to be appealing to, well, pretty much everyone.

Wacoal also states that Cross Walker weight loss pants are designed with what they call "hip-up"... the fibers of the weight loss pants sculpt and lift from the hips down, creating a more youthful silhouette.

**Photo 5 Cross walker long pants**



Source: <http://global.rakuten.com>

Functional inner wear isn't just limited to underwear and bras. You'll find many other styles such as the pelvic correctional inner wear: the position, angle, and opening

of the pelvis is closely related to your lower torso's bodyline, so diets and products targeting the pelvis are booming in Japan now.

**Photo 6: Kotsuban make pelvic correctional underwear**



大人女子は皆気にしてる? <sup>こつぱん</sup> 骨盤のゆがみ



骨盤ベルト付きショーツ ヒップハンガーショート

Source: <http://global.rakuten.com>

Leg wear that reduces leg swelling is just as popular as the many pelvic correctional inners on the market. They provide gentle compression to fight swelling, the arch-nemesis of slender legs. They are useful on vacations and other situations where you might tire from walking.

**Photo 7: Otto legs wear.**

Source: <http://global.rakuten.com>



## **Fitness and underwear**

After the turbulent years of the feminist revolution, today in the relationship between the sexes, it seems that women have found the pleasure of showing themselves in all their sensuality appreciating the luxury linens. Parallel to this process, the last decade has established a new model of femininity keen to develop and enhance its characteristics of strength and athleticism, especially through sport. The new ideal woman had an impact within the trends and underwear fashion. Here comes the frenzy for body sculpting: toning and sculpting your body, at the cost of exhausting sessions of muscle exercises. Energetic, supple and dynamic girls are the image of the modern woman. This quest for health and wellness has become a widespread social phenomenon, which several developments and social impacts on local customs, lifestyles, eating habits and inevitably on the way of dressing. From a recent study of Promostyle on upcoming trends, activewear has emerged as the dominant trend.<sup>23</sup>

Today's women are anxious to maintain as long as possible their body in a good shape. A sociological survey showed that 71% of them practice at least one sport, while 20% join the gym. In this process the active clothing has played a crucial role, it was released from the limit of the gym to be extended to leisure, relax in the house, especially, for some items, it is starting to replace the classic underwear. Widely appreciated is the technological innovation of the fabrics that is best expressed in the so-called "second skin" garment, comfortable and moulded on the shape of the body. Trends in fitness and wellness derived one from the other and in fashion they led often to common results. For example, the deconstruction of the garments, the bra loses the armour and turns towards the shapewear introduced by sportswear. Garments become comfortable, functional, restraints, highly technical. Appear vests of cotton and spandex with built-in bra.

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<sup>23</sup> Colagrande Laura (2003). *La scommessa dell'intimo. Tendenze emergenti e prossime sfide dell'underwear: dalle strategie vincenti delle marche di successo ai punti vendita*. Franco Angeli

**Photo 8: Camisole with built-in bra by Uniqlo.**



## ブラキャミソール


ブラなしで、バストラインを美しく。  
インナーでも重ね着アイテムとしても  
使える定番のコットンキャミソール。

Source: <http://www.uniqlo.com/>

Uniqlo is a Japanese casual wear designer, manufacturer and retailer and it's popular for its innerwear. One of UNIQLO's main products is HEATTECH. It keeps people warm, so it is useful in winter. It is thin and comfortable, so people can wear many layers of clothing easily. Also it has some good functions: it keeps in heat, and dries quickly. HEATTECH material has odor control, is anti-static, and stretches. Moreover, there are a variety of HEATTECH products, including: T-shirts, turtlenecks, underwear, leggings, and socks.

HEATTECH represent Uniqlo's on-going efforts to develop truly technologically advanced apparel. Heattech's innovative materials absorb the moisture generated by the human body before converting it into heat. Uniqlo is extremely particular about its designs, which is why it continues to invest in research to improve the heat-retaining features of this cutting-edge clothing category.

**Figure 3: The 7 functions of HEATTECH**



**THE 7 FUNCTIONS OF HEATTECH**

WOMEN

<b>HEAT GENERATION</b>	When HEATTECH absorbs body moisture, the movement of tiny droplets actually helps to generate heat to keep you warm.	<b>STRETCHABLE COMFORT</b>	HEATTECH stretches to give you a perfect fit and maximize comfort.
<b>HEAT RETENTION</b>	Air pockets between the fibers retain both body warmth and the warmth generated by HEATTECH's moisture absorption.	<b>ANTI-STATIC</b>	Thanks to its unsurpassed moisture retention properties, the fiber also reduces discomfort from static electricity, especially when putting on and taking off the garment.
<b>SOFT TEXTURE</b>	Camellia oil, often used in cosmetics, is woven into the fibres for a softer feeling on the skin.	<b>NON-DEFORMING</b>	Highly resilient and durable, HEATTECH maintains its shape even after repeated washing.
<b>ODOR CONTROL</b>	HEATTECH fabric minimizes odor due to perspiration.		

Source: <http://www.uniqlo.com>

### 2.4.2. Symbolic Value

Fashion and clothing are forms of non-verbal communication since they do not use spoken words. Roach and Eicher (1979) assert that the unifying function of fashion and clothing serves to communicate membership of a cultural group both to those who are members of it and to those who are not.

When customers are purchasing new clothes, they tend to alter their mood and become happier and more satisfied when wearing them. In order for people to satisfy their needs, it may sometimes go to the extreme when people become addicted to the feelings they get when wearing something new. Within fashion clothing as well as other items such as cosmetics and perfumes, the added value is often emotional, and the brands therefore become symbolic devices. It is not necessarily the functional capabilities of the purchased item that are the primary motive for buying a certain apparel or product. People tend to purchase a branded article because it communicates something about themselves through the design, packaging, price or even the effort they have made in the selection process of the desired product.<sup>24</sup>

Roacher and Eicher (1979) propose that the emotional survival of humans somehow depends upon their ability to find a balance between meeting the

<sup>24</sup> Costantino Maria (1998). *Fashion Marketing and PR*. London : Batsford

requirements of the society and protect a sense of self-identity. Some colours and joyous lines can be used in attempt to change a person's mood.

As a means of expression, consumers use brands and products in order to communicate their self- concept to their reference group.<sup>25</sup> Self-concept is an instrument employed by marketing managers in the process of psychographic segmentation, as are personal values. The concept of "self" has a long history in psychology: in some case, "self" has been defined as a person's attitudes and feelings towards oneself, and in others, as a set of psychological processes that rule human behaviour.<sup>26</sup> Schwartz (1992) defines personal values as "enduring beliefs that individuals hold about specific modes of conduct that they think are important and the guiding principles in their lives".<sup>27</sup>

According to cultural theorist Paul DuGay, products are "meaningful" insofar as they are a part of a certain "cultural universe" and have become inscribed in a system of "shared social knowledge".<sup>28</sup> As a result, their use allows individuals to express a set of culturally constituted meanings, associated with social group membership, values, and life style. The symbolic value of a product derives from its relationship with other objects-symbols in the system of categories (the code) specified by a given culture. The purchase, ownership, or use of a product position its owner in a cultural coordinate system, which enables observers to make judgments of similarity and dissimilarity, and judgments of superiority or inferiority. Thus, the symbolic value of a product to its user is defined by its ability to generate meanings related to social identity and status of the user.<sup>29</sup>

Products can be generally understood as having both functional and symbolic value for consumers. Accordingly, value creation can be understood as unfolding at

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<sup>25</sup> Chaplin Lan Nguyen, John Deborah Roedder (2005). *The Development of Self-Brand Connections in Children and Adolescents*. Journal of Consumer Research, 32(1), p. 119-129

<sup>26</sup> Hall Calvin S., Gardner Lindzey (1978). *Theories of Personality*. New York: Wiley.

<sup>27</sup> Schwartz Shalom H. (1992). *Cultural dimensions of values: Toward an understanding of national differences*. 25th International Congress of Psychology. Brussels.

<sup>28</sup> DuGay Paul (1997). *Production of Culture. Cultures of Production*. London: Sage.

<sup>29</sup> McCracken Grant David (1988). *Culture and Consumption – New Approaches to the Symbolic of Consumer Goods and Activities*. Bloomington, IN: Indiana University Press.

two levels – a material level, where resources are combined according to specifications of available product and process technologies; and at a cultural level, where resources are combined to reflect cultural categories and trends.

According to McCracken (1988) while meaning advertising and product design are the main instruments through which meaning is purposefully attached to goods, it is only through rituals of exchange and possession, among others, that consumers appropriate the symbolic value of goods. As DuGay observes “... the processes of production only provide a series of possibilities that have to be realized in and through consumption.”<sup>30</sup> Products acquire their social meanings through the way consumers choose to integrate them in their activities and to display them in various social interactions. This choice of course is guided by various social discourses, including advertising.<sup>31</sup>

The construction of product meaning, and the creation of symbolic value, therefore, involves a set of interrelated processes and practices that are only partly under the control of a firm. While firms purposefully try to attach meaning to products through processes of production and representation, how the media represents products, how consumers spontaneously manipulate them and use them to construct social identities, and what social mechanisms arise to regulate their distribution and use in society may substantially affect the cultural value and significance they eventually acquire. Production and consumption are therefore linked together in a process whereby the set of meanings that are eventually ascribed to an object depends on the interaction between several actors: designers, engineers, advertisers, managers, consumers, opinion leaders, media, etc. The meanings that products come to have are constructed in a process of “dialogue” between production and consumption, mediated by other institutional forces.

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<sup>30</sup> DuGay Paul (1997). *Production of Culture. Cultures of Production*. London: Sage.p. 59

<sup>31</sup> DuGay Paul (1997). *Production of Culture. Cultures of Production*. London: Sage.p. 14



**Table 1: Functional value vs. symbolic value**

	Functional Value	Symbolic Value
Definition	Ability to perform specific task that satisfy customer needs	Ability to generate meanings about individual and social identity
Locus of value creation	Production (physical)	Production (symbolic) and consumption
Process of value creation	Combination of resources in physical production process	Combination of resources in practices which define meanings: design (visual symbol) and advertising (visual and verbal symbol)
Nature of innovation	Performance improvements	Displacement of current objects used for signification in the process of consumption
Value realization	Use of product to perform task and satisfy need	Use of product to communicate to self and other about self
Source of value	Fit with customers' value chain/ instrumental needs	Fit with customers' self perceptions and social aspirations
Critical resources	Intellectual capital, social capital, reputational capital	Cultural capital, symbolic capital, institutional capital

In fashion, large amounts of resources are developed to the development of design for clothing. These resources are not primarily used to make these goods more functional: rather, their goal is to let the product appear more “fashionable”. By fashion one generally mean the process that identifies certain design, products or social behaviours as “in” for a limited period and which replaces them with regularity by new design, new products and new forms of social behaviour. If the consumption of a

fashionable item is removed from its specific social context then changes in fashion do not entail any improvement in product quality.

Apparel is especially a way of communicating one's self-image to the surroundings. Clothes and shoes that individuals use are part of the first impression people get of an individual. Thus, buying a branded shirt or a pair of jeans does not only give value to a person's wellbeing but it is also a reflection of the personality.

The apparel industry is one business where branding is a common way for companies to differentiate from competition and gain competitive advantage. Although one branded t-shirt may not differ from another when it comes to quality, the brands are different, and this will lead to a perceived diversity between the products. However, underwear differs from external and visible apparel in general, due to the fact that they are actually hidden underneath other clothes. Underwear cannot, unless in certain situations, communicate the wearer's self-image to the surroundings.

Values and meaning that consumers assign to underwear are far away from the primary function of covering and protecting: underwear is an expression of femininity and enhancement of the charm as well as instrument of seduction. The percentage of impulsive purchase is increasing because underwear is chosen and bought on emotional basis arousing the same or a major involvement than the external clothing's purchase.

Brands and branding are getting more and more important. Branding is today an important marketing tool for manufacturers but also building relationships with the customer is an essential aspect. It can determine whether a company will be successful or not. Having a good customer relationship and being keen to the needs and demands of the customer is of great importance for the firm. Developing a reliable relationship with customers is a corner stone in order to establish a long-term relationship. This can be the prerequisite to a loyal customer and thus, higher sales to the company.<sup>32</sup> When a customer purchases a branded product, the purchase is carried out with the intention that the product and the brand shall reflect the buyer's image

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<sup>32</sup> Reynolds Janice (2002). *Practical guide to CRM : Building more profitable customer relationships*. Gilroy: CMP Books

and lifestyle.<sup>33</sup>

The definition of the visual identity is long-term codes that characterize brand communication.

Message, tone, atmosphere, the media strategy, point of sale, and merchandising are, if employed correctly, able to make the corporate image distinguishing. It is necessary to have a strong consistency between stylistic- and visual identity in order to build a strong brand. A successful brand should connect with an image that is relevant to the identity of the customers at that point in time. To maintain leadership, brands need to transfer themselves across generations. In fashion clothing and accessories this transfer is particularly difficult due to the fact that clothing is within such a symbol intensive product category.<sup>34</sup>

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<sup>33</sup> Baskin Merry (2003). *Brand new brand thinking: Brought to life by 11 experts who do*. London: Kogan Page.

<sup>34</sup> Saviolo Stefania, Testa Salvo (2002). *Strategic management in the fashion companies (1st. ed)*. Etas Milano.

## 2.5. Hypothesis

History gives us a clear vision of the main functions of underwear and how these evolved accordingly to new needs and change in fashion trends. Japan and Italy are two countries that went through a completely different development that influences the way consumers perceive fashion trends.

Underwear in Japan was introduced very late compared to Italy, where it was already an essential garment for women to appeal men and gain confidence. Japanese women wearing kimono were not used to wear western style clothes and the introduction of underwear was long and not homogeneous. In fact, in the countryside, where the influence of Westernisation was not so marked, women continued to wear kimono.

Panties became necessary only because convenient and practical while working and then, due to an increase of a feeling of shame, to cover private parts. Therefore, in Japan the main function of underwear was to cover and protect private parts in contrast with the function that Italian assigned to underwear: shape, sculpt and enhance women body to make them beautiful, strengthen their self-esteem and attract men.

We can gather a contrast between PRIVATE (Japan) and PUBLIC (Italy) and between FUNCTION (Japan) and AESTHETIC (Italy).

This contrast is still now present if we consider the today's market situation. Italian lingerie market has developed trends proper of the fashion industry and consumers consider underwear a fundamental garment that complete the look. The concept of “public” defines this tendency to research something that satisfy aesthetics features, that can be shown as a outwear garment.

In contrast with it, “private” is the concept that describes better how underwear is considered in Japan still nowadays. Underwear has become something that can help women to mould their body, change their shape to look more beautiful and gain confidence but compared to Italy, Japan doesn't look for a beauty that is shown through underwear, but for underwear that helps your body to look more beautiful. Therefore, underwear should stay hidden, as a secret support for your confidence. This

leads to the development of functional and more technical garments such as fitness underwear and calorie-burning garments.

### **Chapter 3: Methodology**

There are generally two types of research methods, quantitative and qualitative. These methods can be used together or separately; one should choose the method most appropriate to the purpose of the thesis. Quantitative method is focusing on statistical instruments and how to prove relations between different variables. Furthermore, it is characterized by a large sample, which is examined via forms, statistical methods and analysis of the data. An advantage of quantitative research is the high degree of objectivity and due to the large scope of observations it is possible to make generalizations. Qualitative method on the other hand, means research that generates descriptive data. In the qualitative method, the researcher gets access to this information through interviews or by analysing text documents.

The purpose of this thesis is to compare the Italian and Japanese lingerie market, analysing trends and culture influences. Using a qualitative method, the focus goes in depth to truly understand the process of thinking when a customer buys underwear because the qualitative approach fosters a creative and innovative interaction between the interviewer and the respondent.

The first step is to identify the most popular lingerie brands in Italy and Japan and analyse them from a marketing point of view underlining the characteristic of each brand, how it presents itself on the market, which image it wants to suggest in the customer, its communicative methods etc.

The second, and the most important, step is a direct confront with customers. The author decided to interview directly 25 Italian and 25 Japanese girls/women from 20 to 50 years old to understand deeply their choices and how they consider lingerie. Interviews were conducted directly or by Skype for Japanese customers, during November and December 2013.

After the interviews were done, the taped information was transcribed. This gives the authors a better overview of what was said and it is also making sure that no important information was lost. The next step in this process is to code and systemize the information. After this was done the analysis of the collected data was easier to interpret and conclusions could easier been drawn.

## **Chapter 4: Case study**

In this chapter will be analysed the most popular lingerie brands in Italy and Japan underlining the features that characterize the position of the brand on the market as a functional lingerie brand or a pure fashion product. The first example is one of the most famous Italian lingerie brand around the world, La Perla. It is considered not a mere lingerie article but a high positioned fashion product; in fact its competitors are high couture brands such as Luis Vuitton, Gucci, Prada etc. Other important brands on the Italian market are Intimissimi and Yamamay. Both positioned on the medium level for quality and price.

The first Japanese brand analysed is Wacoal. It has a long history of excellence in its products, of using high-level technology to create high-quality products. The second example for the Japanese market is not a Japanese brand but after Wacoal it's the most popular, Triumph. It was founded in Heubach, Germany but it became soon an international manufacturer. Finally it will be considered a casual wear retailer, Uniqlo that became popular also for underwear.

### **4.1. La Perla**

Founded in 1954 in Bologna by Masotti Ada, since the beginning La Perla group contributed to create a new concept of lingerie as a fashion product. It addresses a classic and sophisticated woman that looks for a romantic and sensual style. La Perla used its high handcrafts tradition, maintaining unaltered its principal feature: extreme research of quality.

It created a new lingerie concept that come out of the pure functionality and become a proper fashion product: instead of the traditional white and flesh-coloured lingerie, La Perla suggested particular colours, checked and floral fabrics, laces, etc. In the 80s, La Perla launched the first triangle bra made of silk and the first coordinates made of elastic lace in line with the trend of those years that provided for fitted clothes in order to show the bodyline. In this period, underwear started to assume the characteristic of a fashion product.

The main theme of La Perla's collections is the languishing and cruelty eroticism that springs from a mature and sophisticated woman through colour on colour and plenty of laces.

La Perla started its activity producing one type of product, addressed to a specific customer but thanks to the know-how developed in the years and with a targeted communicative strategy, it extended its collections to young women, kids and men, creating different lines dedicated to each consumer.

La Perla realized that the Italian lingerie market gives a lot of space to qualitative aspect and particular care over finishing and introduced accessories and products closely related with lingerie such as swimwear, sunglasses and beach bags, tight, pieces of jewellery and perfumes, to enhance women from every point of view. Furthermore, from the strengthened experience in producing lingerie, the company launched a line of dresses, especially evening dresses that remind undergarments such as corsets and long petticoats.

Now La Perla leads the underwear field for quality, grade of innovation, carefulness and attention in finishing touches: important features that allowed the company to create complete and utter prêt-à-porter underwear articles.

La Perla's projects have always two characteristics: high level of quality and well defined advertising campaign. Corporate communicative strategy is diversified and pays a lot of attentions to different ranges of customers and high quality images: specific and different frame of reference defines every single collection. La Perla communication is completely centred on the body, since it's a lingerie company it focus on the intimacy of the body. Images exalt the body shape and play generously on seduction and eroticism effects. The product is worn as a jewel and stands out in its preciousness.

Through the years the company decided to distinguish itself focusing on an image of sophistication and exclusiveness as a fashion label rather than an underwear company. For this reason La Perla refuses to publicize its products through TV commercials because prefers to maintain a élite image since the television instrument standardize products and it's not suitable for exclusive niche products. La Perla choose national and international press campaign through underwear specialized magazines



and high fashion magazines using the same technique of presentation adopted for the ready-to-wear. However, advertising campaign are not enough: today, communication moves more and more on entertainment and spectacularity. As for the Italian market, and more general the European one, thanks to our deep-rooted culture, companies maintain a more sober and less commercial communication style because Italian consumer doesn't want to perceive underwear as a large consumption product.

La Perla understood the importance of modern distribution systems and in addition to the utmost care of stores' image, it betted on the e-commerce with success.

**Photo 9: Jeisa Chiminazzo, testimonial La Perla Spring/Summer 2013**



Source: <http://www.laperla.com>

Focus points:

- Lingerie as a fashion product that should not be considered as a mere innerwear garment but as jewellery to show;
- Sexy and elegant lingerie dedicated to a sophisticated woman;
- Advertising strategy oriented to a more specific target.

## 4.2. Intimissimi

Intimissimi is an Italian clothing label founded in 1996 in Dossobuono di Villafranca, Verona. It is specialized in bras, briefs, lingerie, vests and pyjamas for women and men. The brand belongs to Calzedonia group and now counts 1020 shops around the world. Intimissimi promotes values as romanticism, sensuality, naturalness and contemporaneity: the brand is inspired by fantasy and emotions, aims to enhance women's charm without overemphasize and following always new trends. Young stylists, that pay attention to every single detail, create a proper fashion product. Intimissimi communicates its style through widespread advertising (printing, billposting, TV commercials) taking care to not be vulgar and solicit people's emotions. In 2005 Intimissimi signed an agreement with Victoria's Secret to sell their products under the American brand in the United States.

Recently Intimissimi as promoted an important initiative to respect the environment and sensitize customers at recycling. In collaboration with I:CO, a company specialized in recycling, Intimissimi offers the possibility to receive discounts on its products' purchases in return of discarded clothing articles that will be recycled and reused to create new products.

Intimissimi is investing deeply in communication and the use of testimonial to strengthen the brand image and this is the characteristic that distinguishes the brand Intimissimi from its competitors. The advertising campaign "Heartango", which see as testimonials Monica Bellucci and Gabriele Muccino, can be considered an example of cinematography product placement: commercial communication consisting of the inclusion or reference to a product, a service or a brand, in the heart of a preconceived

narrative content. It is in fact a short film produced by Intimissimi visible only on the web. In addition, the brand is visible in many Italian films: *Femmine contro maschi*, *Maschi contro Femmine*, *Immaturo*, *Happy Family*.

The policy of Intimissimi in advertising theme is clear: few words, few descriptions, few written words. Intimissimi points to the emotional aspect, as do all the major luxury brands. The group has always chosen some of the most beautiful models in the world: Monica Bellucci and Bianca Balti, Irina Shaykhlislamova e Blanca Suarez. On the web site there is a section dedicated to the "adv story" with all the commercial campaign and the testimonials.

Intimissimi does not seek to rely itself to the consumer by appealing the opposite sex: infact, female models are much more numerous then male models in Intimissimi.

The experiential marketing adopted by the company, however, appeal to the sensations that advertising arouses: women project themselves in the magnificent role of the testimonials. Furthermore, choosing a female testimonial influence the man's sensitivity, who clearly become more receptive in terms of advertising: men are made part of the purchaseing process, either personally or with "pressures" on wives/girlfriends.

Focus points:

- Lingerie follows fashion trends as prêt-à-porter clothes;
- Various styles dedicated to all targets;
- Testimonials are an important aspect of the advertising strategy.

**Photo 10: Blanca Suarez, testimonial Intimissimi 2013.**



Source: <http://it.intimissimi.com/>

### **4.3. Yamamay**

Yamay is another Italian clothing label belonging to Inticom S.p.A. group. Founded in 2001, the brand was immediately considered one of the ten emergent companies in the fashion industry. Yamamay produces underwear, stockings and tights, pyjamas, knitwear and swimwear for women, men and children. In 2009 it launched on the market a line of cosmetic products and make-up called Yamamay Beauty and recently, thanks to collaboration with Mirade spa, also a line of shoes called Yamamay Shoes.

Yamay aims to create a selected network of stores through the franchising distribution characterized by a well recognizable brand and aimed towards a market that pay attention to quality, design and price. The development of the brand is based

on an intense communication strategy through printing, billposting, presence of flagship stores and corners in department stores. Yamamay's collections offer elegant, glamorous and sensual products depending on the target (es. ladies or teens) and on the particular occasion (wedding, beach etc.). The brand counts around 600 stores in Italy and in the world and has a widespread distribution network through mono-brand boutiques in franchising and direct management. Furthermore, Yamamay was the first Italian underwear brand that has expanded its activity online.

The typical client is basically a woman, loyal and frequent visitor to the shop, more than once a week with repeating purchases of small amounts. She buys for herself according to a logic of pleasure and self-gratification. For this reason, the store is designed in her function. She also will purchase for your partner and, where appropriate, for her children, thus giving an additional value to the store for service content considerate the size and depth of the range of products.

**Photo 11: Marica Pellegrinelli, testimonial Yamamay 2013.**



Source: <http://www.yamamay.com/>

Focus points:

- Lingerie follows fashion trends as prêt-à-porter clothes;
- Various styles dedicated to all targets;
- Testimonials are an important aspect of the advertising strategy.

#### 4.4. Wacoal

Wacoal Corporation (株式会社ワコール *Kabushiki-gaisha Wakōru*) is a worldwide lingerie manufacturer and marketer headquartered in Kyoto, Japan. The company has a clear mission: to create new value that exceeds the expectations of each generation of consumers. Much of the diverse line-up of women's intimate apparel readily available in Japan today would not have been possible without the determination of Wacoal to create solutions to consumer need.

- Bras designed to enhance the beauty of woman, a concept quite different to any product that had come before;
- A pioneering girdle, the patent for which was the first international patent ever obtained in Japan;
- High performance underwear inspired by shipbuilding technology and manufactured in three dimensions using a 3D model;
- Luxury, high quality lingerie, created using the world's most outstanding fiber technologies.

Wacoal has a long history of excellence in its products, of using high-level technology to create high-quality products. Today, Wacoal is in the process of strengthening its reputation and appeal in the global underwear market. Wacoal operates in 39 countries worldwide, and has indeed become the international powerhouse.

Since its establishment more than 60 years ago, Wacoal has grown into the leading company in Japan's intimate apparel industry. During this time, the Company has worked to help women look and feel more beautiful. As the meaning that women

attach to beauty becomes more sophisticated, Wacoal offers several brands dedicated to different targets, specific customer groups and lifestyles.

It offers an extensive range of reasonably priced products incorporating the latest fashions and are specifically aimed at the younger market, particularly women in their 20s, but also in their 30s and over 45.

Wacoal is using its strong brand power to steer its business in a new direction, Body Design. With this new business concept, Wacoal is looking to help women attain new levels of beauty in their daily lives by giving them the support they need for expressing both the physical and emotional aspects of their bodies. In 1964, Wacoal established a Product Research Division, and began to address the issues of intimate apparel design from a human engineering perspective, measuring and analyzing the true physical shape of Japanese women. That department still exists today, although now it is known as the Human Science Research Center. The Center carries out research on many aspects of the female body, going beyond just body shape and external beauty, and focusing also on quantifying the other experiences associated with wearing underwear, such as the way a fabric feels against the body and the fit and comfort of the garment. A facility similar to the Human Science Research Center in Japan has now been established in China and the USA, and local researchers are beginning to build up new databases on the figures of women customers in those locations. The Wacoal Sports Science Corporation, located in the USA, has conducted research on the mechanisms of joints and muscles on more than 35,000 subjects, and has used the findings of that research to obtain more than 50 patents world-wide. With a strong focus on basic research and a design and manufacturing approach based on objective data, these achievements are all characteristic of Wacoal's proven ability to continuously create new value.

The development of new and innovative value-added products and services is crucial to ensuring Wacoal succeeds in implementing its Body Designing business concept. Its brassiere fitting service, *Dublevé*, is just one example of how the company is helping to widen its customer base through effective one-to-one marketing techniques. Wacoal has created this business as a value-added service for customers looking for brassieres with an individual fit. By using in-house-developed

measuring devices, they can offer custom-made brassieres from 1,248 different size variations, at prices that customers can afford.

At the same time, Wacoal is drawing on its renowned know-how and technology in alliances with other companies to pursue new business opportunities through innovative product development. For example, Wacoal's high performance wear brand CW-X, designed to enhance physical condition during sports. It has also been applied to development of inner wear ranges such as Fitness Walker and Cross Walker aiming to improve walking posture.

Wacoal is also working to improve its growth potential by increasing its points of contact with customers and developing new retailing concepts. The development of a network of shops and the expansion of the Company's catalogue mail-order business and Internet retailing are at the centre of this strategy. Through a three channel retailing strategy based on a combination of shop, catalogue, and Internet sales, Wacoal is looking to further expand sales of its intimate apparel products.

The brand's promotions often features female celebrities, such as 'Empress of pop' Ayumi Hamasaki in 2008 and 2009. Wacoal has also several prominent brand ambassadors from the sport world, including Major League baseball player Ichiro Suzuki and professional tennis player Ai Sugiyama, who testify to the benefits of Wacoal's sports lines. Wacoal is expected to continue its positive performance in sports markets.

#### Focus points:

- Products oriented to satisfy customer's needs of simple and functional underwear;
- Scientific research to develop new technologies and fibres;
- Various styles dedicated to different targets,
- Use of famous ambassador for advertising communication.



**Photo 12: Ayumi Hamasaki, testimonial Wacoal Spring/Summer 2009.**



Source: <http://www.ebay.it/>

#### **4.5. Triumph**

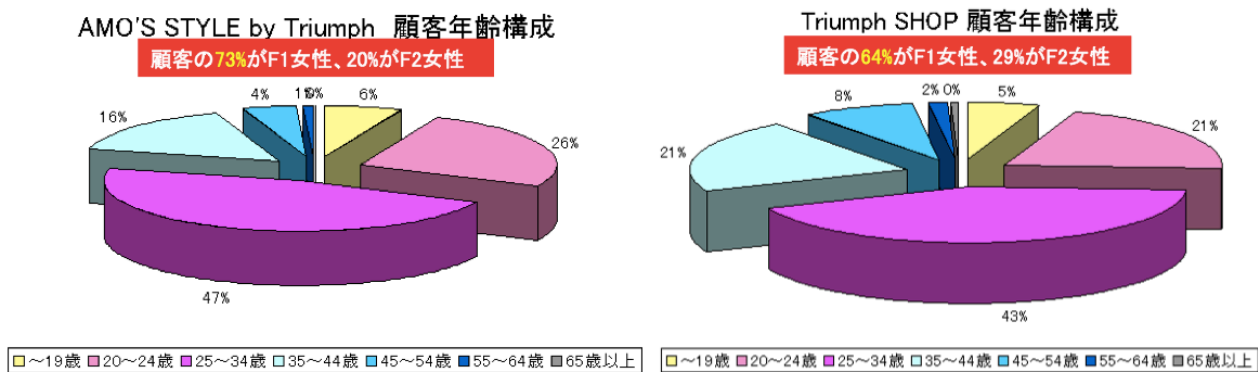
Triumph International (Japan) Co., Ltd., which produces some of the nation's best-known women's underwear brands, was established in 1964 as the Japanese subsidiary of Triumph International. In fact, Triumph International is the world's largest manufacturer of women's underwear, with 140 sales sites in 140 countries, and production sites in 55 countries.

From finest seductive lingerie to ultra-high-performance functional sportswear, from casual young fashion style to men's underwear that's as comfortable as it's creative, the strong brands of Triumph International offer 4 different brands for men and women of all ages:

- Triumph: it's the main brand that offers variegated products. It is characterized by seductive styles combined with quality fabrics for very special occasions – glitter, glamour and elegant, glossy satin. Products of superior design, comfortable to wear and functional.
- Valisere: superfine lingerie and intimate apparel, high quality materials, sophisticated and luxury couture sensation.
- Sloggy: highest-selling branded brief in the world because of its ultra-high quality and unique comfort.
- Hom: masculinity and innovation in the world of men's underwear. It's a man's underwear brand born in Marseille, France, that offers functional and basic products but also with high fashion content.

Triumph International Japan sales its products through different type of reseller: "Triumph SHOP" usually located in departement stores, "Triumph Factory Outlet" offers for a reasonable price products of the previous season and "AMO'S STYLE", shops dedicated to a youg target.

**Figure 4: Consumers divided by age**



Source: <http://www.triumph.com>

Triumph opened 239 stores "AMO'S STYLE" in the major cities in Japan. These shops are dedicated to young girls in their 20 and are gaining a strong position as a lingerie store.

**Figure 5: AMO'S STYLE web page**



Source: <http://www.amos-style.com>

Focus points:

- Functional underwear but oriented toward fashion;
- Various styles to satisfy all consumers;
- Special shops dedicated to different targets.

#### 4.6. UNIQLO

Yamaguchi-based UNIQLO (a combination of the words unique and clothing) is a Japanese casual wear designer, manufacturer and retailer. UNIQLO's basic range of well-made, affordable and fashionable clothing has proved popular in Japan. UNIQLO's limited ranges of basic clothing are available in predominant colours are black, navy, white, red and various shades of brown with no visible labels. Store design is based on a minimalist, 'pile 'em high, sell' em cheap' concept. UNIQLO is capitalising on the fashion industries trend towards the post-logo phenomenon.

Even if UNIQLO is not a proper underwear brand, in Japan its underwear range become really popular. This is because it offers, as Wacoal, functional underwear that is what the majority of Japanese consumers are looking for.

UNIQLO announces the global launch of AIRism, its new brand of highly functional underwear. Under the catchphrase "comfort unlimited," UNIQLO is extending AIRism to its home market of Japan, increasing the product lineup by more than 70% and launching a major marketing campaign across the 13 markets where it currently operates stores.

AIRism is created in accordance with UNIQLO's drive to continually offer innovative clothing to transform the lives of customers around the world. With AIRism, UNIQLO will deliver "comfort unlimited, in any season for any person, anywhere."

Featuring the latest Japanese fibre technology, AIRism offers incredible comfort, winning accolades from UNIQLO customers in international markets where it debuted in 2012. The high performance fabric offers a total of eight comfort-enhancing features across men's and women's lines. They include UNIQLO's DRY and odor control functions as well as the ability to quickly absorb and release trapped moisture and stay cool to the touch.

AIRism succeeds UNIQLO's highly successful Silky Dry and Sarafine lines developed around the innovative concept of using ultra-fine fibres to regulate the circulation of the air trapped inside clothes. This innovation created garments that felt so light and soft to the skin that wearers forgot they were even wearing them.


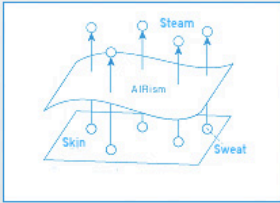
AIRism builds on this legacy, delivering supremely comfortable underwear with a texture that feels both soft and smooth on the skin, is cool to the touch and features UNIQLO's DRY function to quickly absorb and dry away perspiration.<sup>35</sup>

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<sup>35</sup> <http://www.uniqlo.com>

**Figure 6: Functions of AIRism**

FUNCTIONS OF AIRism

<p><b>SMOOTH TEXTURE</b></p>	<p>Ultra fine fibres provide a smooth texture, which is soft to the touch. Fitting you like a second skin.</p>	 <p style="background-color: #0070C0; color: white; padding: 2px; text-align: center; font-size: 0.8em;">Stretches to fit the body, for a snug forming fit.</p>  <p style="background-color: #0070C0; color: white; padding: 2px; text-align: center; font-size: 0.8em;">The fine micro fibres in AIRism allow heat and moisture to escape. Keeping you dry, cool and comfortable all day long.</p>
<p><b>QUICK DRYING</b></p>	<p>The fine micro fibres within AIRism allow body heat and moisture to escape. Quickly drying away sweat and perspiration.</p>	
<p><b>STRETCH COMFORT</b></p>	<p>The elasticity of AIRism provides a perfect fit - fitting you like a second skin, without compromising movement or maneuverability.</p>	
<p><b>ODOUR NEUTRALIZING</b></p>	<p>AIRism undergoes a special treatment process which neutralises odours.</p>	
<p><b>ABSORPTION</b></p>	<p>AIRism is fully breathable. Absorbing moisture and perspiration and releasing it through the garment to leave you feeling cool and comfortable.</p>	
<p><b>ANTI-BACTERIAL</b></p>	<p>AIRism provides a cooling sensation which is felt the second it comes in contact with your skin.</p>	
<p><b>COOL TOUCH</b></p>	<p>The fibres of AIRism undergo a special process which prevents the growth of bacteria, thereby eliminating unwanted odours.</p>	

Source: <http://www.uniqlo.com>

UNIQLO's marketing strategy appeal to famous athletes as ambassadors of the company. It furnished the uniforms for Japan's Olympic athletes in 1998, 2002 and 2004 Olympic games, as well as the uniforms for J. League's Thespa Kasatsu team. Current No. 3 player in the World Golf Ranking Adam Scott wore UNIQLO when he won the 2013 Masters at Augusta National Golf Club in Augusta, Georgia, USA. Current No. 2 ATP tennis player Novak Djokovic also wore UNIQLO shirts and shorts at the French Open, Wimbledon, US Open and Australian Open, as does Japanese No. 1 Kei Nishikori. On September 2, 2009, Fast Retailing Co. Ltd. announced that the company would target annual group sales of 5 trillion yen (about 61.2 billion US dollars) and pretax profit from operations of 1 trillion yen (about 12.2 billion US dollars) by 2020. This means that the company is aiming to become the world's biggest specialty retailer of Private label apparel with a continuous growth rate of 20% per year.<sup>36</sup>

<sup>36</sup> Kensuke Kojima (2011). Uniqlo syndrome. Tokyo Kenzai Shinpo Sha

Focus points:

- Simple underwear in different colours and models;
- Underwear line dedicated to fitness and other functional needs;
- Company ambassadors are athletes to sponsor sportive lines.

## Chapter 5: Interviews

25 Italian women and 25 Japanese women were interviewed about their habits for what concerns lingerie. Since the interviews were conducted in Italy, the author used Internet to communicate with Japanese customers. Through word of mouth it was possible to select 50 women in different stages of their lives to better understand how fashion influences generations and also how the social and cultural background influence the customer's purchase behaviour.<sup>37</sup>

	Japan	Italy
20 - 30	10	10
31 - 40	11	9
Above 40	4	6

Before stating the presentation it is necessary to specify that conducting interviews on Skype was not easy. First of all because it was difficult to convince Japanese girls to talk about this theme since they were really embarrassed. Subsequently, it was difficult to create a dialogue going beyond the author's questions. The different cultural approach to this theme is the first aspect that comes to light from this experience. Finding Italian women inclined to talk about their personal opinion, feelings and experiences with lingerie was not a problem at all since they consider it an ordinary topic about which they talk freely with their friends, read on magazines and newspapers, hear from the television and radio.

It was decided to face the embarrassment taking the conversation less personal as possible to make guest feel more comfortable.

The theme was introduced asking them about their relation with fashion and brands. Both Italian and Japanese girls between 20 and 30 years old have asserted that are really interested in fashion and amazingly diligent readers and followers of fashion magazines. Japanese girls are really fascinated by western brands and 6 out of 10 of them from 20 to 30 years old declared that they love go shopping with friends and their style is influenced by western celebrities. On the contrary, the other 4 Japanese

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<sup>37</sup> See attachment 1 "Interview's questions"

girls declared that they don't follow a specific style or trend but just buy what they like and even if they are fascinated by fashion, they don't consider important buying branded clothes and accessories. Secondly it was demanded if they have branded items and almost all of them from 20 to above 40 years old declared to own at least one branded bag. Japanese women in their 30s assert to own more than one branded item and explained that all their friends purchase expensive western brands and they consider them good quality products that will last longer than cheap products.

Italian women asserted to like shopping but all generations have a different approach to fashion. 4 out of the 11 women in their 30s don't seem interested at all in fashion and declared to don't follow trends and don't buy expensive product such as branded clothes and accessories. Interviewed women above 40s like branded clothes not just for the quality, that they consider it's a feature that a lot of cheaper products own nowadays, but also for the design and the stylistic research. So, we can deduct that they have a more mature vision of the fashion industry than young girls that see it as a way to show their status.

Both Japanese and Italian women seemed to be comfortable talking about fashion and it was a good starting point to lead them to the theme of this research. Asking them what they consider fashion products, Italian women included lingerie and underwear. Just 5 Japanese girls in their 20s said that underwear can be considered a fashion product but they named renewed brands such as Victoria's Secret.

They were asked if branding influences also their choices when it comes to lingerie. Almost all Italian women answered that brand is not important but when they buy underwear they are loyal to some brands that they consider a good choice for quality, fitting and design. So what they look for is not the brand name but what the company offers. For example girls between 20 and 30 years old asserted that they usually shop at Intimissimi for the medium price level, fresh and young design, good quality materials and a vast range of products that complete the look. Also women in their 30s declared to buy underwear in Intimissimi, Yamamay and Golden Point, the most popular underwear companies in Italy. 4 out of 11 women said that they own at least one lingerie ensemble from La Perla because they bought it for a special occasion such as wedding, or someone gave her as a present.



They were asked: "If you have the possibility to choose one brand that you like more than other without considering the price, which brand will it be?" 20 out of 25 Italian women answered La Perla and Victoria's Secret. They motivated their choice pointing out the position of the companies on the market. They are a haute couture brand that offers elegant, sophisticated and sexy products that make a woman feel beautiful and sensual. They would like to buy it not just to show themselves in front of their partners but also for their self-esteem and confidence. Since these companies produce expensive garments, young girls cannot afford them but they assert to aspire to buy their products and actually they research the same characteristics of them in cheaper brands that recreate trends launched by those companies. The other 5 women (2 between 20s and 30s, 3 above 40s) declared to be satisfied with their habitual brands and that they would buy them even if they could afford a more expensive one.

Women above 40s declared to look for different attributes when it comes to underwear. They look for quality of design but also for a garment that can fit and shape their bodies. Despite the fact that they consider underwear an important part of the outfit, they mainly research garments that make them feel comfortable and that enhance and sustain their shapes. It doesn't mean that design is not important but instead of sexy and uncomfortable lingerie ensembles they would choose a simpler and specific garment for her bodies.

On the contrary, Japanese women declared to have a totally different approach with branding for what concerns innerwear. All the interviewed women said to consider underwear a private matter and for this reason it is not necessary to own branded garments because you cannot show them and it would be a waste of money. Even if brand is not important, design is one of the aspects that they look for when they buy underwear. Young girls research cute and feminine lingerie ensembles that make them feel prettier, women in their 30s look for comfortable and functional underwear but pay still attention to design and women above 40s seem to be not interested in fashion at all and buy functional underwear.

An aspect that seems to be important to highlight in the confront of the 2 markets, Italian and Japanese, is the fact that when they were asked about their loyalty to a specific brand because it offers all the features that they look for, almost all

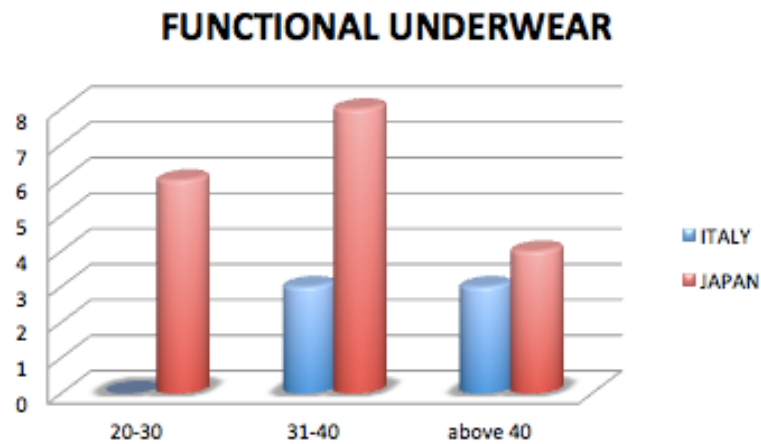
Japanese women asserted that they are not inclined to it; they buy underwear when they need it and don't pay attention to the brand but just to the design, quality and functionality, they buy what they are attracted from. The occasion was used to ask how often they do shopping and purchase underwear. The question created a little bit of embarrassment with all the interviewed customers and the answer was not always given. Also Japanese girls in their 20s, that seemed to be more confidence talking about their shopping habits, showed embarrassment when it came to lingerie; so the question was redirected to where they buy innerwear. 6 out of 10 girls under 30s answered that they have bought underwear online on specialized websites and rarely they buy it in a physical store. The other 4 girls buy underwear in specialized department stores. Women in their 30s and above 40s answered that they buy innerwear in specialized department store or in flagship stores such as UNIQLO.

UNIQLO has resulted very popular for underwear, since almost all the interviewed customers asserted to have purchased at least once UNIQLO's underwear. The motivations are:

- Cheap price;
- Good quality;
- Large range of colour and fancy patterns;
- Functionality.

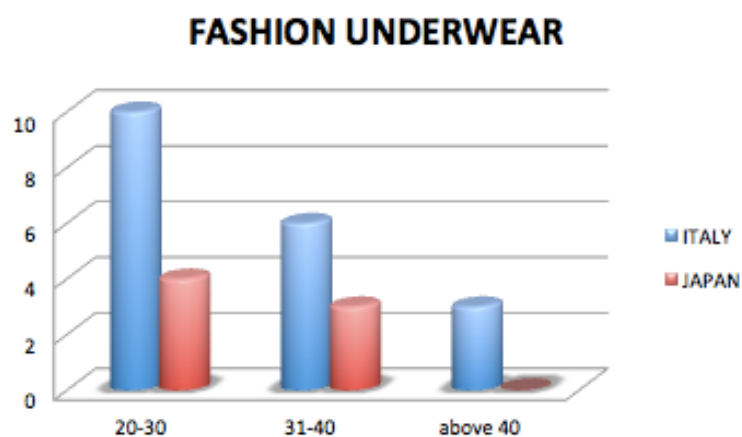
The last of these characteristics seems to be the main aspect that influences the purchase of women above 40s. Functional underwear is common also among Italian women above 40s but we can see a huge difference between Japanese and Italian women under 40 years old.

**Figure 4: Functional Underwear**



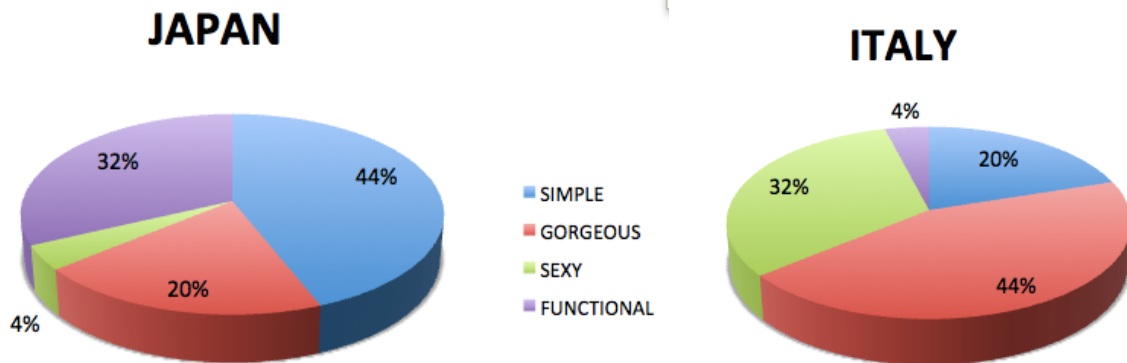
3 out of 6 Italian women above 40 years old prefer comfortable underwear that shapes their bodies as well as almost all the interviewed Japanese women of the same age and also between 30s and 40s. On the contrary, Italian women under 40 years old seem to have more interest in fashion features than functionality especially in their 20s. The following graph shows that interviewed Japanese consumers haven't a particular interest in fashion attributes especially above 40s.

**Figure 5: Fashion underwear**



They were asked what style of underwear they usually buy. Their preferences can be recap in 4 categories: simple, gorgeous, sexy and functional.

**Figure 6: Underwear style**

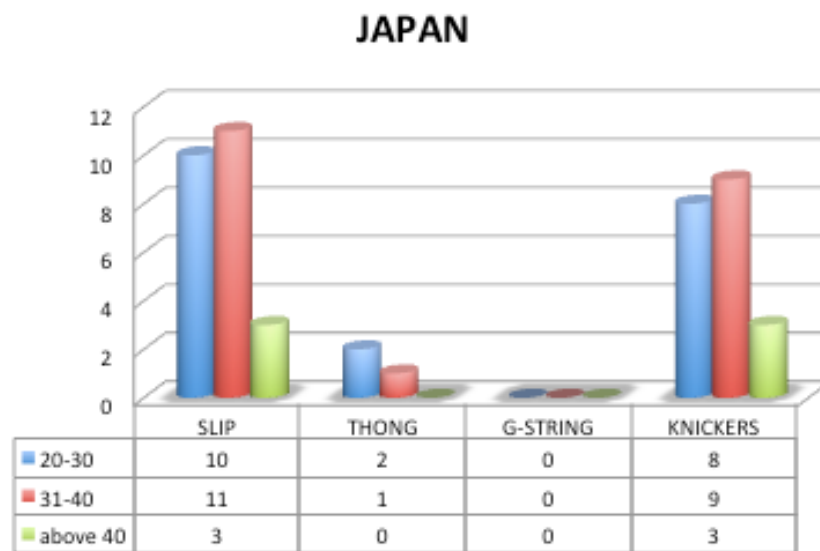
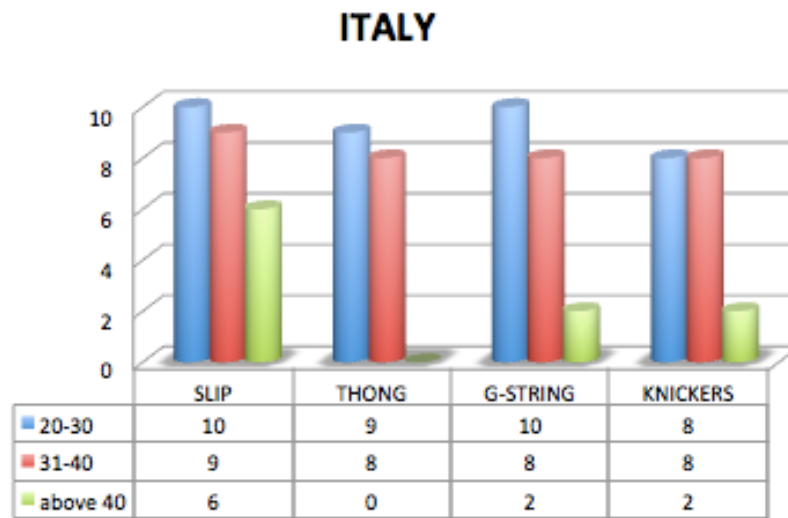


We can find a lot of differences between the consumers of the two countries also for what concerns the type of underwear that they choose. It was considered the most popular types of underwear and showed them some pictures to better understand the familiarity with those articles.<sup>38</sup> The most popular types among Italian girls under 30s are the G-string and the brazilian slip. 8 girls out of 10 declared to feel comfortable wearing G-string because there are no visible signs on the clothes and because it makes them feel sexier than wearing normal slip. G-string is popular also among women between 30 and 40 years old but less used above 40s. According to the last category, G-string is used mainly when they are wearing a particular dress but in the everyday life they prefer to wear simple slip. On the contrary, Japanese women of all ages seem to be not inclined to use this type of underwear. They were really surprised taking a look to the pictures and women above 40s seemed to be disgusted by it. Also young girl were embarrassed in front of the pictures.

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<sup>38</sup> See attachment 2 “Underwear images”

**Figure 7: Underwear Type**



A question that created embarrassment was if they ever been measured from a sale assistant to find the right size of their bra. Almost all the Japanese interviewed said unwaveringly no. They expressed a certain shame confronting their bodies with someone else. They said to be reticent even to ask information about underwear. Italian women on the contrary didn't express the same feelings regard it but anyone of the interviewed declared to have been measured.

## **Chapter 6: Conclusion**

### **6.1. Findings**

The purpose of this thesis is to compare two different Countries about a specific field of the fashion industry: innerwear. It was decided to proceed from a marketing point of view, analysing market, main brands and communication strategies. However, also sociological factors were considered to understand better customers' choices.

This topic was explored using the most popular brands from both markets and customers' personal experience to found some interesting points to answer the problem. The findings were enhanced through 50 interviews with the Italian and Japanese customers and through brand's analysis. The models used in this thesis have to be combined in order to present their view of subject. When performing the interviews the authors found a very homogenous understanding upon the differences between the Italian and the Japanese market for what concerns the lingerie industry. In this conclusion the authors will put all the findings together and highlight the differences between the two different markets.

In the past intimate apparel used to be considered little more than something that was worn under clothes, making functionality — support, correction, and comfort — much more important than design. Today, however, the design and image of products are also of crucial importance, and there are some truly unique and surprisingly bold designs available on the market. The popularity of these brands is a clear indication of consumer demand for sensual and luxurious design in addition to functional performance as underwear.

The literature review shows us how the history and the culture influenced the approach that a country has today with underwear. In Italy, as well as in other European Countries, underwear in the past was used to shape the women's bodies to make them more beautiful according to trends of those periods. From the laced corset and hoop skirts of the Elizabethan Era to modern day Wonderbras, lingerie has helped define what it means to look beautiful and reveals women's changing role in society.

While in Italy women started to use underwear as instruments to shape and mould their bodies, women in Japan were still wearing Japanese kimono and western clothes, underwear included, were not diffused among Japanese population. When underwear was introduced in Japan its role was confined to its functionality: cover private parts. A feeling of shame was hugely diffused among Japanese population even for what concerns underwear.

Today's underwear market situation shows a transformation of the role of lingerie from the past. In Italy is considered an important part of the outfit that doesn't give just the right shape to the body but enhances it and complete the look thanks to stylistic researches. In fact, design features are the main aspect that Italian consumers today are looking for. Today's Japanese consumers still maintain a certain shame for their private parts and lingerie but they have learnt how to take advantage of it to feel more beautiful shaping their bodies. They became confident with their body, open to new trends introducing garments made by lace, with a plunging neckline. Cups and padded bras are amply used and favourite pieces are push-up for bras, hip-up for hips and slip-up for the buttocks.

The difference between the two markets is that in Italy underwear is considered a public garment, it complete the outfit and can be shown; on the contrary in Japan it's a private garment, useful to make a woman feel more confident but it shouldn't be shown to other people.

<u>ITALY</u>	<u>JAPAN</u>
<p>PAST (Public)</p> <p>Underwear was used to shape and mould women's body to make them feel more confident showing it to others</p>	<p>PAST (Private)</p> <p>Underwear was used to cover private parts.</p>
<p>PRESENT (Public)</p> <p>Underwear became a fashion product that completes the outfit.</p>	<p>PRESENT (Private)</p> <p>Underwear is used to shape women's body to make them feel more confident without show it to others</p>

The feeling of shame that was predominant in the past among Japanese women is still present also among young generations. Interviews confirmed that underwear is still a private matter in Japan even if there were radical cultural and social transformations that allowed western fashion trends to permeate in Japan. From this research emerged that in Italy the main trend in the underwear industry is sexy, feminine and sensual lingerie that make women feel sexy and confident. In Japan the main trend is functional underwear, promoted by all the most popular brand such as Wacoal, Triumph and Uniqlo.

## **6.2. Implications**

Japanese lingerie market is more oriented towards functional garments, researching new materials and new technologies due to face the consumers' demand of this kind of products. However, it should be said that fashion features are an important factor that also Japan started to develop, as Triumph's "Amo's style" stores suggest us.

But to become a fashion product, lingerie needs to be considered in the same way as outerwear. As we have seen, the store structure is an important aspect that should be revisited to make the consumer feel comfortable.

Traditional commerce acquire more importance in an epoch where eCommerce gains a big success also among fashion products. Traditional commerce should not be replaced by modern eCommerce but it should be a plus instrument to let potential consumers know the services that the company offers and that they can purchase its products everywhere.

In Italy, the phenomenon of fashion-ize lingerie led a lot of fashion companies to extend their products' range including underwear. It is the case of famous companies such as Calvin Klein that bets on its underwear collections using high impact advertising campaign.



### **6.3. Limitations and Future Research**

The limit of this research is that often information were generalized without considering that, both in the past and in the modern era, consumers that live in the city and consumers that come from the countryside have a different approach to lingerie. This is because, especially for what concerns Japanese customers, needs and familiarity with western style clothes are discordant. It was evident during interviews that Japanese women that grow up in the city are more open to talk about underwear and follow international fashion trends than women from the countryside. Therefore, it will be necessary to examine in depth all the cases in order to not end up in generalizations.

## **Attachment 1: Interview's questions**

- 1) How do you consider underwear?
  - a) Fashion items at the same level of a dress
  - b) Fashion items but not important as a dress that everyone can see
  - c) An item necessary to cover and protect private parts
  - d) An item the sculpt and shape the body
  
- 2) What do you think about branding?
  - a) Branded products have better quality and design
  - b) Branded products are a status symbol
  - c) Branded products are just too expensive and not necessary
  
- 3) Is the brand important for underwear?
  
- 4) Are you influenced by advertising and commercials when it comes to underwear?
  
- 5) If yes, what kind of advertising?
  - a) On fashion magazines
  - b) TV commercials
  - c) Poster around the city
  - d) Internet
  
- 6) When do you buy underwear, what is the main factors that you consider when purchasing underwear?
  - a) Appearance/design
  - b) Brand
  - c) Price
  - d) Comfort
  - e) Materials

- f) Wearability (body shape and modelling)
- 7) What are your main expectations from your lingerie?
- a) Comfort
  - b) Aesthetic
  - c) Maintenance
  - d) Modernity
  - e) Sexiness
- 8) What are your preferences?
- a) Simple
  - b) Gorgeous
  - c) Sexy
  - d) Others
- 9) How often do you go underwear shopping?
- 10) Where do you buy underwear?
- a) Department store
  - b) Specialized shop
  - c) Online
  - d) Mail order
- 11) Have you had your bra size professionally measured?

**Attachment 2: Underwear images**



**Image 1 SLIP**



**Image 2 THONG**



**Image 3 G-STRING**



**Image 4 KNICKERS**

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