

Discover your *edge*

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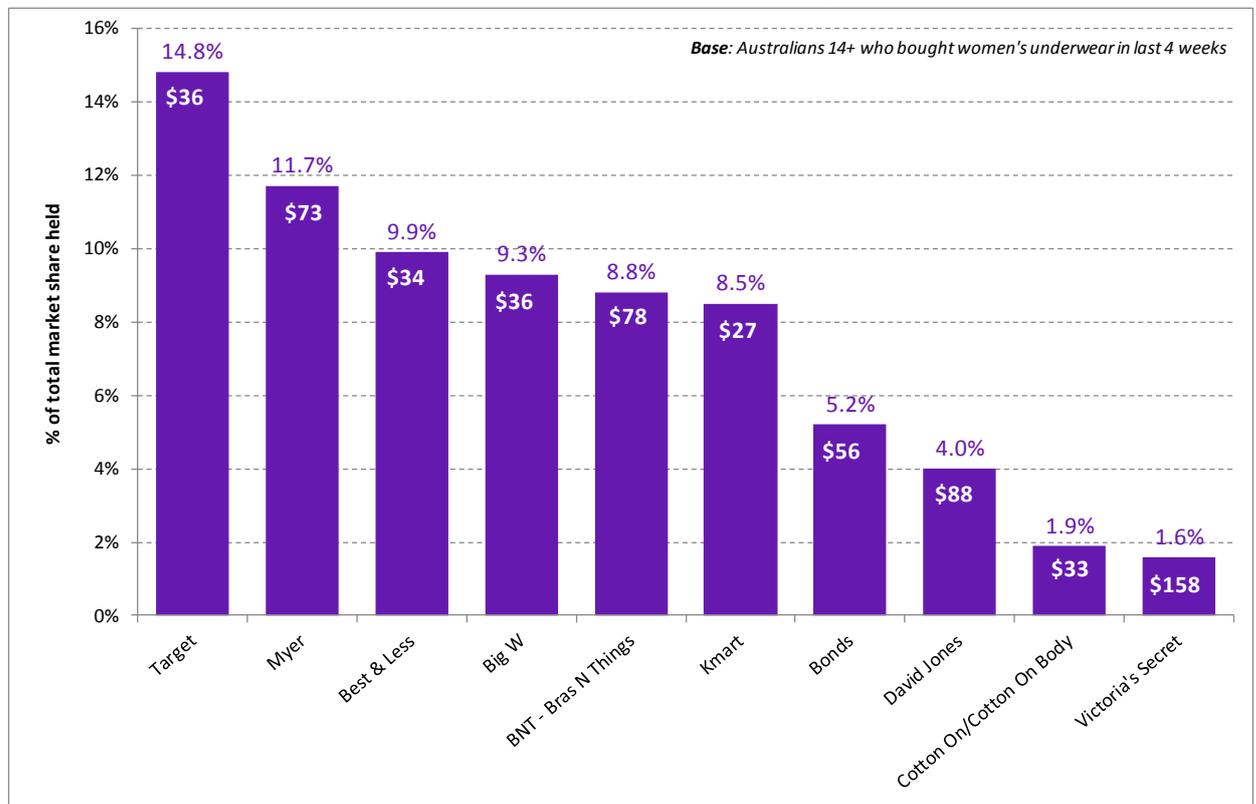
Target hits the bulls' eye for women's underwear

Bras and knickers are big business in Australia, the latest findings from Roy Morgan Research reveal, with just over 2.5 million Australians 14+ buying women's underwear* in any given four weeks, spending an average of \$55 per person. This translates to a market worth more than \$1.8 billion per year. Against this competitive backdrop, one retailer stands out from the pack, both in terms of customer numbers and total market dollar share – Target.

In an average four weeks, 576,000 Australians (or 22.5% of total women's underwear shoppers) make at least one women's underwear purchase at Target, putting it at number one for customer numbers in this product category. Although Target shoppers spend a relatively modest average of \$36 each (well below the national average), their sheer volume ensures that the discount department store holds the largest slice of the total women's-underwear market in dollar terms (14.8%).

Meanwhile, its Wesfarmers stablemate, Kmart, attracts 447,000 women's-underwear shoppers in an average four weeks, putting it in second place for customer numbers – but only sixth in terms of market share (8.5%). This discrepancy is due to Kmart customers' average spend on women's underwear being so low (\$27).

Top 10 women's-underwear retailers: market share (with average customer spend)



Source: Roy Morgan Single Source (Australia), April 2015 – March 2016 (n=1,993).

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Best & Less secures third place for both customer numbers in an average four-week period (412,000) and for dollar share of the women's-underwear market (9.9%). The average Best & Less shopper spends \$34 per four weeks on women's underwear.

Despite ranking fifth for shopper numbers, Myer has the second largest share of the total market (11.7%), thanks to its customers' above-average four-weekly spend of \$73. Still, compared with David Jones customers (who spend \$88 on women's underwear per four weeks) this can be seen as almost thrifty—and positively bargain-basement, when one considers that the average Victoria's Secret shopper spends \$158 on women's underwear per four-week period.

** NB: Women's underwear excludes socks and hosiery*

Norman Morris, Industry Communications Director, Roy Morgan Research, says:

“In the Australian women's underwear market, Target is queen, leading the field in customer numbers and in total dollar market share. While its customers may not spend a queen's ransom on women's underwear, there are well and truly enough of them to put the retailer on top of the market. Having also won the March and April Customer Satisfaction Awards for the Discount Department Store category, Target is setting a high bar all round.

*“Roy Morgan data shows a distinctly mature skew among Target shoppers, with Pre-Boomers and Baby Boomers being the generations** most likely to buy women's underwear there. However, just to keep things interesting, we find that Boomers are also more likely than the younger generations to buy women's underwear from David Jones. On the other hand, Kmart tends to attract much greater proportions of Generation Y or Z shoppers than any other group...as does specialist retailer Bras N Things.*

“Obviously, generation is just one variable influencing Australians' women's-underwear purchasing decisions. With Roy Morgan Single Source, savvy women's-underwear brands and retailers can gain a far deeper understanding of the consumers most likely to buy their products, with insights gleaned from our powerful blend of demographic, attitudinal and behavioural data — allowing them to identify and communicate with their target market much more effectively.”

***NB: Roy Morgan 'Generations' definitions: Pre-Boomers — Born pre-1946; Baby Boomers — born 1946-1960; Generation X — born 1961-1975; Generation Y — born 1976-1990; Generation Z — born 1991-2005.*

For comments or more information about Roy Morgan Research's retail data, please contact:

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Related research findings

View our range of [Department Store Customer](#) and [Department Store Satisfaction profiles](#), as well as an in-depth profile of [Australians who buy Women's Underwear](#).

Compiled with data from Roy Morgan's Single Source survey (the largest of its kind in the world, with 50,000 respondents p.a), these ready-made profiles provide a broad understanding of the target audience, in terms of demographics, attitudes, activities and media usage in Australia.

About Roy Morgan Research

Roy Morgan Research is the largest independent Australian research company, with offices in each state of Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research has over 70 years' experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
7,500	±1.1	±1.0	±0.7	±0.5
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2