

US AND CANADIAN  
RETAILERS

PRESENTED BY



EUROVET  
AMERICAS

# PART 1

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## THE US / CANADIAN INTIMATE APPAREL AND SWIM MARKET

# INTIMATE APPAREL MARKET

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## EUROPE

(FRANCE, UK, GERMANY, ITALY, SPAIN)

14,9 BILLION DOLLARS

SLEEPWEAR/ DAYWEAR:

- 27,4 %N FRANCE
- 21%N ITALIE
- 13,8 IN GERMANY



## UNITED STATES

14 BILLION DOLLARS

LINGERIE / CORSETRY: 74,5%  
SLEEPWEAR/ DAYWEAR: 25,5%

# AVERAGE LINGERIE BUDGET

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## EUROPE

98,1 EUROS

\$ 134

## NORTH AMERICA

83,9  
EUROS

\$ 114,8



# SWIM MARKET



UNITED STATES  
44.7 % OF THE GLOBAL  
SWIMWEAR MARKET

# SWIM MARKET

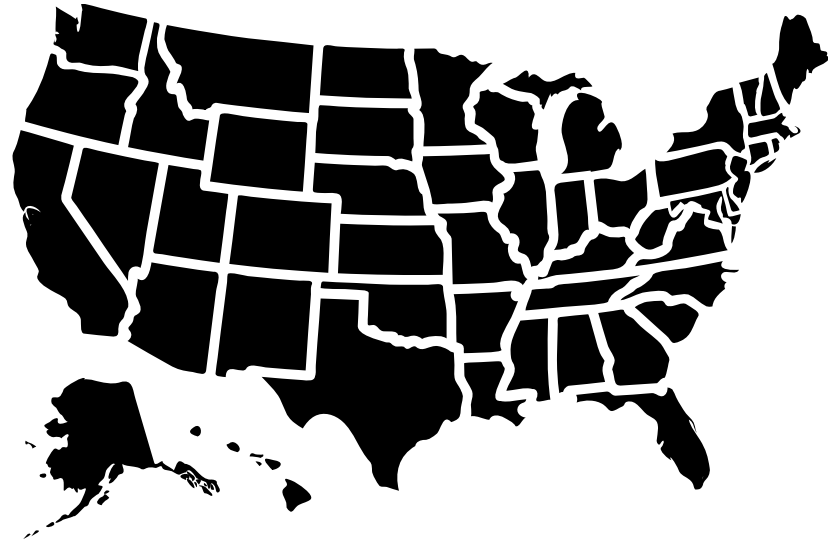
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## EUROPE

(FRANCE, UK, ALLEMAGNE, ITALY, SPAIN)

3,3 BILLION DOLLARS IN 2012

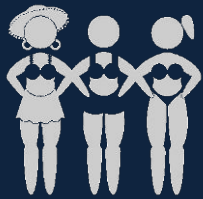


## UNITED STATES

3,5 BILLION DOLLARS IN 2012

US SWIMWEAR MARKET  
44,7 %

WOMEN  
70 %



GLOBAL  
SWIMWEAR  
MARKET

# NORTH AMERICAN SWIMWEAR MARKET

> OPPORTUNITIES

M-COMMERCE



SMARTPHONES



PLUS SIZE MARKET





# NORTH AMERICAN SWIMWEAR MARKET

## > THREATS

LACK OF PERFORMANT FABRICS IN THE US



INTERNATIONAL ECONOMIC INSTABILITY

WEATHER



# US RETAILERS BY CATEGORY

PREMIUM

DEPARTMENT STORES

SPECIALITY STORES

Neiman Marcus

BERGDORF  
GOODMAN

journelle

INTIMACY  
(bra fit stylists)

à la mode  
intimates

bloomingdale's

Saks  
Fifth  
Avenue

The  
Bra Bar  
& PANTERIE

Diane's  
BEACHWEAR

Trousseau  
MEMPHIS

NORDSTROM

ALLA PRIMA  
FINE LINGERIE & SWIMWEAR

Posh  
lingerie

A  
Tropical  
Affair

Dillard's

Ophelia

ANTHROPOLOGIE

free people

Freshpair

AR HERROOM  
LINGERIE WE BUY FOR OURSELVES

EVERYTHING BUT water

H&M

VICTORIA'S  
SECRET

CANYON  
BEACHWEAR

bare  
necessities®  
your fit. your style. your necessities.

GILT

vente-privee.com

simons TILLY'S

Zappos  
.com  
POWERED by SERVICE®

CHAIN STORES

MASS

ONLINE STORES



US LINGERIE MARKET  
14 BILLION DOLLARS



INTIMATE APPAREL / CORSETRY

\$ 10.4 BILLION SPENT



SLEEP / & LOUNGEWEAR

\$ 3.8 BILLION SPENT

CHAIN  
STORES

35%

MARKET SHARES

VICTORIA SECRET  
22%

DISCOUNT

STORES

45%

MARKET SHARES

SPECIALTY  
STORES

20%  
MARKET  
SHARES

HIGH END  
PREMIUM

DEPARTMENT  
STORES

12%

MARKET SHARES

MAIL ORDERS

1,9%

INTERNET PURE  
PLAYERS

1,2%

SPECIALTY STORES

4,9%

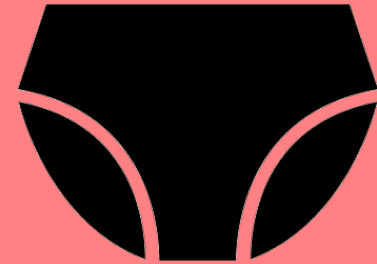
MARKET SHARES

320  
BRANDS

BRAS  
58%



PANTIES  
32%%



SHAPEWEAR  
7%

OTHER



# KEYS TO SUCCESS IN THE US

1 HAVE A VISION

6 FOLLOW UP !

2 CREATE A PLAN

7 CUSTOMER SERVICE

3 DEFINE YOUR PRICE

8 DO WHAT YOU SAY,  
SAY WHAT YOU DO

4 ANALYZE THE MARKET

9 LISTEN AND ADAPT

5 CONNECT WITH YOUR  
SALES TARGETS

10 LOOK FOR PARTNERS



# REQUIRED QUALITIES

FLEXIBILITY

COMMUNICATION

HUMILITY

ATTENTION

NOVELTY

PATIENCE

TRANSPARENCY

FIT

SERVICE

QUALITY

ON-TIME  
DELIVERIES

# COMMON MISTAKES

NOT ADAPTING COLLECTIONS & SIZES

IMPATIENCE

BELIEVE THAT THE US =  
SAME AS HOME COUNTRY

CULTURAL  
DIFFERENCES

UNREALISTIC GOALS

LACK OF MARKETING / ADVERTISING

# PART 2

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## CASE STUDY

# journelle



WHY DID CLAIRE  
CHAMBERS OPEN  
HER FIRST  
JOURNELLE STORE?

CREATE A DIFFERENTIATION

A BETTER SHOPPING EXPERIENCE IN STORE

QUALITY OFFER

NEWNESS

UPCOMING DESIGNERS

HIGH END SERVICES

THE JOURNELLE  
EXPERIENCE

LINGERIE IS ABOUT  
FIT AND FASHION

BOUTIQUE EXPERIENCE

A FRESH MERCHANDISING

CUSTOMER SERVICES

ESSENTIAL BEST SELLERS

LONG TRAINED EMPLOYEES

LARGE OFFER

UPDATED PRODUCTS



HOW DID JOURNELLE ADAPT  
ITSELF TO  
THE MARKET AND  
CONSUMER BEHAVIORS  
IN THE LAST 3 YEARS?

NEW DISTRIBUTION  
CHANNELS AND MEANINGFUL  
PARTNERSHIPS

# ONLINE STORE

Free Shipping & Free Returns

journelle

SIGN IN | CREATE ACCOUNT | SHOPPING BAG (0)

GIFT REGISTRY

SHOP BY PRODUCTS | DESIGNERS | FAVORITES | BRIDAL | NEW | SALE GIVE GIFTS GET INSPIRED Search

Home / Products / Bras

## THE BEST UNDERPINNINGS

GIVE YOUR NEXT-TO-NOTHING  
A LITTLE SOMETHIN' SOMETHIN'



## BRAS

SORT BY: Please Select One

CATEGORY <input type="text"/>	BRA SIZE <input type="text"/>	SIZE <input type="text"/>	COLOR <input type="text"/>	FABRICATION <input type="text"/>	DESIGNER <input type="text"/>	OCCASION <input type="text"/>
FEATURE <input type="text"/>						



TIMPA  
Duet Lace Underwire  
Demi Bra  
\$36.00



CHANTELLE  
Rive Gauche T-Shirt Bra  
\$78.00



NATORI  
Feathers Contour Plunge Bra  
\$68.00



TIMPA  
Duet Lace Half-Cup  
Padded Bra  
\$50.00



EBERJEY  
Colette Racer Back Bralet  
\$59.00



NATORI  
Feathers Front Close T-Back  
Bra  
\$66.00

# THE JOURNELLE ATELIER





journelle

*Road Trip*

# THE GREY LADY—A BOUTIQUE ON THE ROAD

journelle  
*Road Trip*  
2014

JUNE 21<sup>st</sup>  
*King & Grove*  
Williamsburg  
from 1 PM - 7 PM

JULY 3<sup>rd</sup> & 4<sup>th</sup>  
*Ruschmeyer's*  
Montauk  
from 11AM - 7PM

JULY 13<sup>th</sup>  
*Castle Hill Inn*  
Lawn at Castle Hill Inn  
from 11AM - 2 PM  
Newport Yachting Center  
from 3:30 - 6 PM

JULY 13<sup>th</sup>  
*Castle Hill Inn*  
Lawn at Castle Hill Inn  
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JOURNELLEROADTRIP.COM  
#JOURNELLERDTRIP



## HELLO CHICAGO

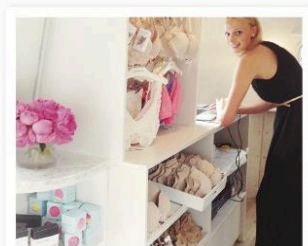
### MEET THE GREY LADY

In need of a lingerie wardrobe update? A private fitting? Something lacey to brighten your day? Or all three? Pop into our airstream boutique stocked with the "best of" Journelle from lovely basics to gorgeous fashion lingerie, loungewear and accessories.

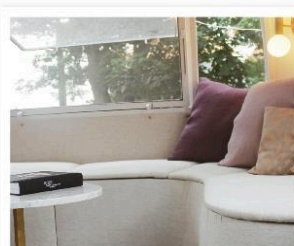
THURS AUG 16TH | NOON-6PM  
22 WEST HUBBARD ST. CHICAGO

JOURNELLEROADTRIP.COM  
#JOURNELLERDTRIP

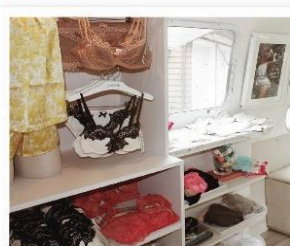
journelle



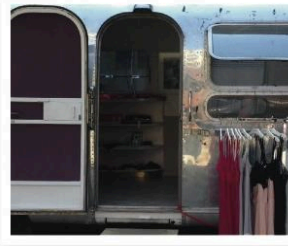
OUR CEO CLAIRE AT THE TILL



AIRSTREAM INTERIOR



AIRSTREAM INTERIOR, MERCHANDISE



SELECTION OF CHEMSIES



AIRSTREAM EXTERIOR



THE JOURNELLES IN CHICAGO

# PARTNERSHIPS

INSIDEHOOK

JOIN US | SHARE



## Your Shopping List

*Courtesy our friends at [Journelle](#)*

All InsideHook members receive 15% off of orders \$150 or more by using the code `INSIDEHOOKVDAY`

1. [Fleur of England Amour Boudoir Bra](#)
2. [La Perla El Color Rojo Balconette Bra Rubino](#)
3. [Stella McCartney Faye Flirting Contour Bra](#)
4. [La Perla Sparkling Jasmine Balconette Bra](#)

PARTNERSHIP WITH INSIDE HOOK (MEN LIFESTYLE WEBSITE) FOR VALENTINE'S DAY

A 360 MARKETING  
EXPERIENCE



# CUSTOMER SERVICE AND RELATIONSHIP

INCENTIVE FOR  
FIRST PURCHASE  
IN STORE / ONLINE



journelle

*Don't Miss Out*

**GET 10% OFF**

YOUR FIRST PURCHASE

ENTER YOUR EMAIL HERE

GET MY 10% OFF

No thanks, discounts aren't my thing.

\*First-time customers only. Not valid on sale items or with other promotions. Valid online only.



Dear Laurie,  
We loved hosting you girls at  
The atelier - hope you all had a  
great time. And be sure to come  
back soon.  
Let's plan for drinks in the  
near future!  
Allison x

THE ATELIER AT JOURNELLE

PERSONNALISED  
COMMUNICATION

# ONLINE EXPOSURE

## SOCIAL MEDIA

The screenshot shows a Facebook post from 'Journelle' dated June 27, 2014. The post title is 'Journelle Road Trip | The Grey Lady - BEACH BAG ESSENTIALS | 27 JUNE 2014'. The main text reads: 'No day spent... BEACH BAG ESSENTIALS | 27 JUNE 2014 No day spent on a deck chair or laying on a towel in the sand is complete without the perfectly packed beach bag. Here's a peek at what we're stashing in our totes...'. The image shows various beach items like a hat, sunglasses, and a bag with the text 'YES WAY ROSÉ'. The post has one comment from Ava Koziak and a share button.

## BLOG



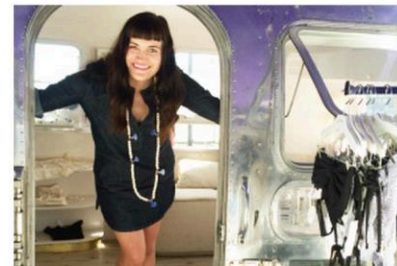
### INSPIRED BY: YSL

Yves Saint Laurent. As the oh-so-clever YSL-inspired t-shirt states "Ain't Laurent... [READ MORE](#)



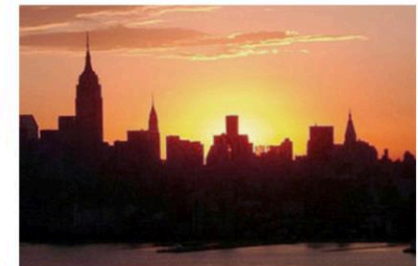
### DESIGNER Q&A: MORGAN LANE

There once was a girl named Morgan. Born + raised... [READ MORE](#)



### THE GREY LADY TAKES BROOKLYN

This past Saturday morning, the sun rose into the sky in... [READ MORE](#)



### SUMMER SOLSTICE

The solstice may be the "official" start of summer, but... [READ MORE](#)

# PART 3

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## US AND CANADIAN RETAIL TRENDS

# #TEENAGERS



A woman with long dark hair is shown in profile, looking towards the right. She is wearing a blue and light green athletic top and matching leggings. The background features a sandy dune with dry grass in the foreground, a blue ocean, and distant mountains under a bright sky.

# ACTIVE WEAR

# # PRODUCT DIVERSIFICATION





# RESORT AND SPA

THANK YOU.