

# Beachwear European distribution

The beachwear market is evolving positively and is undergoing important changes, which, on one hand are imposed by a new consumer with new expectations and is interested in new products and new retail stores. On the other hand an increasing global market that allows manufacturing and distributing brands to operate differently in a new competitive arena. Numerous factors enter this arena, which have added value to beachwear and leading it to become a more integral part of our wardrobe. Distribution, its structure and evolution play an increasingly important role in these changes. For this reason, we have summarized the evolution of beachwear distribution in the west.

## New products for new customers

Swimsuits, just like related clothing and beachwear accessories, have today lost their connotation of being typically associated with "vacations" or "sports" and have become an integral part of the wardrobe all year round. In the current see-saw fashion panorama, beachwear has carved out a niche that is increasing to the point where not only specialized manufacturers specify their offer but also new players, closely related ones such as lingerie producers, pret-à-porter producers and designers. Mark Pilkington, Marketing Director of Splendour Lingerie & Beachwear, the first company to specialize exclusively in lingerie, comments: "We recently launched our first beachwear collection that with success made fitting in a valuable and exclusive style its winning characteristic right away. We received positive feedback from the market because we chose quality multibrand distribution as our channels and a selection of department stores proposing a complete collection full of accessories ...". This most likely was made possible by the new lifestyles of the consumer and her new way of spending leisure time. In fact, these elements, which are translated into an evolution of the purchasing styles, define a new market with endless and often very different facets from country to country within the same European community.

A study conducted by Lyon Mode City in collaboration with IFM and Promostyl revealed that on one hand, the rise in the range of low-cost products weakened the middle segment dividing the market into basic and middle high-high, on the other hand, the market "becomes more complicated and extreme with consumption rhythms that become faceted and even paradoxal."

According to this study, presented by the most important beachwear show today, this evolution had and brou-

ght on repercussions on three different market segments that today comprise the beachwear world: luxury, sport and imagination.

**Luxury:** is now more accessible thanks to the democratization which took place in the last few years, starting with designer labels for example. Up to a few years ago, only a few designers offered beachwear lines, today there are a growing number of designer collections. On one hand, this aspect responds to a demand of extending the range of designer labels to a product area with high profit ability, which is now necessary to constitute the "designer label world".

On the other hand, when licensed products find manufacturers ready to develop their business into the high segment benefiting from very well known brands to find in short and long terms new development paths.

However, this phenomenon, which today is very vast, already seems to be suffering from its specific nature. Its current excessive democratization implies a future return to exclusivity, inaccessibility and rarity to regain possession of its statute and identity. There are already some examples of this, like beachwear and its complements proposed by some designer labels like Dolce and Gabbana, Chanel, Cavalli, Gucci etc...

**Sport:** a segment that has a different importance in European countries. It is an area with great potential because it is undergoing a very interesting evolution especially in the middle range, which today falls within the category of "pure fashion". There are two related reasons for this. First, the sports article has a utilitarian function connected more to performance and physical activity than style, but is becoming more and more a fashion vector.

The boundaries between sport and well-being are becoming closer while trends find common marketing platforms in numerous new converging retail possibilities like sports centers, gyms, beauty centers, spas,

baths, thalassotherapy centers, etc (even though exclusive luxury is also carving out a large niche for itself). This area of development, which imposes itself more often as a trend with great potential, is already seen today as the segment where technicality and creativity can mix into more sophisticated styles.

**Imagination:** an important element in beachwear where colors and shapes can be the determining factor of success and are closely related to the concept of vacation leisure time. Until recently, it was mainly characterized by low ranges, but today it has increased in value. Imagination has become an important element in creativity that in the near future will be present in all product ranges and stimulate a further evolution of beachwear in terms of design. Creative freedom increasingly allows design elements to expand resulting in imagination. The design, prints, melange of styles and ethnic inspirations are continually becoming more important, including the exclusive nature of the craftsmanship...

Producers and distributors therefore adapt their product offer and image to a new multi-cultural consumer, ready to buy in a whole new way throughout the entire year.

## The important phenomenon of seasonal adjustment

The swimsuit becomes an item with a strong added value that is sold all year round because it is worn throughout the year.

The tourist industry, despite the patchy terrorist events, is booming and has been growing for some years now. More and more people are vacationing or traveling to places in the sun all year round. Although the highest sales still take place in the months of May and June and excellent sales are made in July and August with the clearance sales, swimsuits and beachwear are now also sold in the remaining months of the year. Depending on the sales channel and especially on the surface of each retail store, the spaces vary during the year, but however, many offer beachwear practically 10 months of the year, if not 12.

## In a swimsuit all year round...

The collections sold out of season are generally defined as "cruise", but some brands and distributors con-

firm that these sales represent in some - indicative - cases, half of their yearly sales. This phenomenon shifts the interest towards collections designed more for a season than a vacation "market" or, in some specific cases, to a new type of consumer. If designers and brands have revitalized the term "cruise" with their out-of-season collections, the phenomenon can now come under a broader context of "evasion", which is commercially more connected to the concept of quality leisure time.

The importance of collection concepts connected to sales now taking place throughout the entire year is confirmed by the brands interviewed. Emanuela Corvo of Emamò underlines this concept by stating: "The special nature, refinement, style, and completeness of the collections are all fundamental aspects dedicated to a woman who loves beauty.

A woman who is eager to be liked and to like, certainly in search of uniqueness, a woman who is the protagonist of her time, still able to dream, travel and, above all, to live. She chooses the brand because it communicates femininity and seduction interpreted in an ironic and playful way through a collection that has an immediate and evocative language and is rich of charm and glamour. For this customer we look at beachwear as a specific and complete collection dedicated to summer and vacation time."

The average person who takes off season vacations is generally well-off, by now multicultural and definitely "a traveler." This allows us to understand the interest in this trend which is now consolidated.

## ...and even in the city

Within the scope of "intelligent" vacations, destinations focusing on wellbeing, relaxation and beauty care are becoming more prominent. The term "evasion" today also integrates the dedication of time to personal beauty care. Wellbeing and physical shape have become increasingly important and evident elements today, in daily life.

We now find, on one hand, destinations focusing on relaxation treatments like thalassotherapy centers, and on the other hand, easily accessible beauty and health centers: that in turn become "destinations" for which to buy a swimsuit and places where you can buy them. Even city gyms and swimming pools re-



spond to this important phenomenon by integrating solutions and courses for "personal health care" also connected to water: from Jacuzzis to water sports, from relaxing spas to water fitness courses like acquagym, the beach moves to the city. Easy also for the less sportive (at least in the beginning, editor's note) surmising a public ready to choose swimsuits that are not only sports oriented but also fashion conscious, integrating three winning elements: performance, design and fashion.

An example, from France: 45% of Speedo's sales now take place off season, the peak of this 45% is recorded in two main periods: in the Fall, when one most commonly joins a pool and thalassotherapy centers in the spring.

Cross merchandising between beach products and pool products is now evident. Uniting technicality and creativity becomes essential when faced with a new consumer more attentive on how she spends her spare time.

## The customer panorama is extending...

In this context, the significant expansion of the customer base in the three segments mentioned above is evident. From the beach, endless new occasions in which to wear a swimsuit have arrived.

Complementary products, allow a universe of complete, trendy and beachwear product offer, that creates a total look. The choice of non-beachwear brands to design beachwear lines in order to create a total look is obvious (as we will see in the following paragraphs). Clothing stores not specializing in beachwear have consistently inserted swimwear and beachwear into their product offer as well.

## ...and the distribution channels

New and more significant marketing possibilities are developing between beachwear and clothing. One of the most important explanations to this phenomenon is that the swimsuit has lost its primary reason of existence by becoming a fashion item with endless occasions of use. Therefore, it has acquired a different connotation placing it within the priorities of a fashion item.

The commitment to offering beachwear in all retail stores and related opportunities of the modern consumer's new interests leading to an expansion of all beachwear distribution channels.

If traditional distribution consisting of independent multi-brand stores typically connected to lingerie

(many lingerie producers are also large beachwear producers and therefore the main distribution channels are often the same), today in beachwear fashion a segment that revitalizes the retail stores in all of Europe, we find new commercial channels like important hotels, thalassotherapy chains, sports centers with swimming pools (with acquagym courses), large specialty stores and prêt-à-porter stores.

Of course, there do exist differences between countries connected to local cultural and distribution tendencies. In particular, these new channels excluding the large specialty stores touch a high or medium-high range clientele that often does not hesitate to purchase more than one item.

## ...and the offer that becomes more accessorized

It is easy to sense the potential that this new use of the swimsuit and its various related use can generate, at the beach, on vacation or in the city. There is an increase in accessorizing of the product offer by retail stores to correspond with proposals of producers and brands. "This year we have introduced more accessories and fashion complements in our collections with great commercial success," confirms Tricia Jones of Seaspray and many of her colleagues in Europe.

Many stores, in particular, those most successful, whether independent multi-brand stores, brand stores or chain stores, confirm the consumer's interest in beachwear complements and accessories. If the stores developing the sales of this transversal offer, the main focus remains to sell swimsuits, with accessories becoming winning elements and increasing profit. Beach robes, skirts, small beach items, beach bags, costume jewelry, hats, sarongs, beach towels, sunglasses...

The possibilities are endless and are not only connected to the retail store but also to the imagination of the shop owner. Some stores successfully offer an extension of leisure items consistently associated with beachwear such as t-shirts, shirts, shorts, and sandals. They carry a more transversal offer which also includes body products: sunscreen after-sun creams, summer cosmetics, and other specialized products. Basically, there are no longer "swimsuit" stores but "beachwear" stores resulting in more "advanced" distribution. A common extension, stores dedicated to different moments of the day at the beach (or in the pool), a sort of concept store connecting various moments of the consumer.

Jerry Tommolini of Pin-Up Stars confirms this by saying: "The woman today goes to the beach with swimsuits, bags, sandals and matching towel. We



now see a consumer emerge who does not leave anything to chance, who wants to stand out in an elegant way and wants a product that is a clothing item with all its complements and special features, including hand stitching, special cuts and exclusive prints for continually evolving styles..." This explains the reasons for the progressive adaptation of distribution to the new lifestyles of vacationers in the sun, who spend time on the beach, on a boat, in a pool, in an elegant spa, who walk along the seashore or enjoy an aperitif and remain in swimwear even at night.

The product offer can also be diversified with small exclusive series, as Daniel Flachaire of Banana Moon explains to us.

"We propose mix and match styles for limited series and very specific lines of coordinated beach robes, skirts and beach wear."

## Fitting and performance, only made in Europe?

As Tricia Jones of Seaspray confirms, "although many consumers do not show a real interest in "Made in Europe" products as a concept, instead, they instead confirm an interest for a brand capable of conveying strong and clear values.

Furthermore, the panorama of European consumers mainly relates to a population with an average of, elevated spending power, and in the medium range, to a more mature population. Many companies and distributors in the sector, agree, therefore, confirming a further interest for a product with added value and an important mix of technical and fashion contents.

Mark Pilkington of Splendour is not the only one to confirm the new importance of excellent products with good fitting, stressing that many customers declare it openly. In fact, "today we already have a very large clientele base of 30 and over 30," confirms Tricia Jones of Seaspray.

"Their expectations include excellent fitting that must also correct imperfections and an excellent style supported by a clear fashion content."

But it seems that for beachwear (except for sports swimsuits), technicality is not the determining factor. Thierry Muliot of Huit explains it well: "We have always used micro fibers but we are not fanatics of the so-called new intelligent materials (breathable and sun-tanning, etc) or too many technical features. Our evolution has developed by placing attention on the finish, stitching, and mousses.

Customers are more interested in the "touch" and different aspects of the materials rather than their technical properties. Therefore, the innovations they bring are not always perceptible..."

## A new and vast distribution of beachwear

Based on the attitudes of the "local" consumer, distribution has evolved and developed in every country in a different way. Thierry Muliot of Huit summarizes it well by saying, "We know that the retailer generally suffers from the new circuits and undergoes an erosion that varies from area to area and from country to country, coming mainly from the chain stores." But for a product like beachwear, geography is also important.

The large number of beaches, the kilometers of coastline and the climate of countries like Italy, Spain, and France have not only generated a strong industrial specialization over the years spanning from the start to the end of the production chain, but make it possible for a more fragmented trading to still be today's reference for the consumer.

Distribution priorities, actions and performance are defined by substantial differences in beach fashions, and to a higher extent, lingerie or prêt-à-porter fashions. The market and distribution is changing so much that some successful realities underline the extreme importance of the capacity to interpret the changes with intuition and rapidity.

This is confirmed by Jerry Tommolini of Pin-Up Stars, who is testimony of a precise choice regarding this matter: "For 10 years we have chosen to develop without the use of sales managers, since we do not like the idea of one person being assigned with the job of making choices and decisions in a market that is evolving so rapidly.

We have important agents in Italy, France, Germany and Spain and important distributors but our personal involvement is becoming more and more essential." But some large development aces of distribution may form because, on one hand, it is more evident and, on the other, it is potentially interesting in a transversal way, and therefore, sooner or later, exportable.

Despite the analyses coming from the various research institutes in various countries, we have an approach that in part is different and in part closely related to the local distribution companies making it difficult (if not impossible in some cases) to classify in unequivocal terms the evolution of the beachwear distribution compartment.

We offer a general picture which has been developed based on years of experience with the beachwear dossiers of our magazines and interviews with distributors and shop owners and assistants in each country and on information given to us by important beachwear producers.

## Multi-brand stores, the reference for fashion and style

After years of decline in the last couple of years the circuit has recorded an inversion in the trend of performances relating to beachwear from independent multi-brand retail stores specializing in lingerie and swimsuits. As confirmed by Giuseppe Reginato of Argentovivo, "the relationships between the best brands and best stores are improving and policies of offer renewal throughout the entire year generate excellent sell-out performances."

The possibility for specialized multi-brand retailers to better interpret the short term fashion phenomenons, as well as better knowledge of the known clientele and the "market" in which it operates at a competitive and positioning level, seem to offer this distribution channel - and consequently, independent multi-brand prêt-à-porter stores - an important winning factor in respect to organized distribution and typically, the distribution chain. As confirmed by Silvia Domingo, Marketing Director of the Docor Group, this is helped by the fact that due to the specific nature of beachwear and its modal values, stores and distribution do not add a variable value to the total price determining.

For an extremely "modal" product connected to the highs and lows of the season, the division of business risk for shop owners and industrialists sees to it that the best proposal, always the most current and fashionable, is still mainly present in this circuit. And since beachwear is a very modal product, its commercial importance can be felt. Emanuela Corvo of Emamò confirms this viewpoint, "A selection of the best circuits on the national and international distribution panorama is essential, since we have to be capable of selecting and surrounding ourselves with the best partners, as we do in terms of style and product." If Emanuela Corvo's words show special interest towards quality distribution, more industrialists confirm this aspect and Carlo Pezzotta of Domani underlines: "A deep split between the high and low end of the market has been verified in the west, with the disappearance of medium quality products. In this context, the winning choice is to offer exclusive products if one also wants niche products. Therefore, our distribution is oriented towards high profile stores with the addition of clothing stores or new complementary stores."

Although this argument can certainly be confirmed by stores and brands dealing with high range products (who unanimously report increases or an excellent

market hold), the phenomenon is also substantial in the medium range of products and not only in Latin countries (Spain, Italy, France) but also in North European markets and even the United States, which, on the contrary, is witnessing an increase in the pulverization of the quality offer. While multi-brands are losing the ground as seasonal specialists.

## More single-brand stores

There are fewer seasonal multi-brand stores in seaside locations, swallowed up by large chain stores and expensive rents. The new competitors are multi-brand stores with a vast offer and prêt-à-porter stores, rather than chain/flagship stores of distributors and producers. Despite the fact that some of these can be a platform for selling 4/5000 swimsuits annually, many shut down leaving some independent brands without sales channels to sell their products. This has led some brands to open their own stores, especially in seaside locations. These stores are often ex-independent stores who decide to affiliate with a brand to optimize costs and marketing. Many known brands are active in this sense, for example Parah, Kiwi St Tropez, Maryan Mehlhorn, bruno banani, only to name a few. Jan Jassner, Export Manager of bruno banani explains, "Vertical distribution was launched to identify in the clearest way possible the brand concept at the end of the production chain." This is also confirmed by Daniel Flachaire of Banana Moon. "We have an important distribution in multi-brand stores and when opening Banana Moon stores we exclusively operate with a selection of our existing customers." While other solutions, like Maryan Mehlhorn's, involve "the sharing of sales space with other partners, which was realized in 190 sales outlets in Germany."

As Maryan Mehlhorn herself revealed: "This is one of the sales channels with the best possibilities of future success because it deals with made-to-measure solutions which respond to the demands of the business partner." However, not all large brands go downstream as confirmed by Thierry Muliot of Huit.

"We do not have projects in the immediate term for our direct distribution on internet. Distribution is a job different to ours, furthermore we want to better understand the results of the brands which instead are moving in this direction..."

## Prêt-à-porter stores sell more beachwear

For the same reasons as above, prêt-à-porter stores are also developing their beachwear sales. The insertion of beachwear in the product offer of these retail



stores often follows different logistics. However, a common denominator is certainly the need to offer a "universe" of consistent products where beachwear, since it is now a fashion product, no more for a specific use, has found a new space.

A new offer thanks to new products? In a certain way, yes, as confirmed by Carlo Pezzotta of Domani: "Part of our success can be attributed to the choice to dedicate ourselves exclusively to swimsuits, without producing corsetry, our presence on the market and clever distribution. First of all, we try to keep up with the market demands, discovering in advance new trends as well as obviously monitoring the classic fashion and prêt-à-porter channels. If what we have before us," continues Pezzotta "is a market in crisis, it nevertheless has great potential. In the last two years, high-level clothing stores have been moving closer to swimsuits stores.

These stores, which at Easter already exceeded the sales of normal clothing, in the two months before summer find a new opportunity in the swimsuit. In these last few years, these boutiques have also chosen to sell high quality, niche and exclusive swimsuits in line naturally with their image." The offer in these stores is often not vast or extensive but always, however, very consistent with the total offer, therefore dedicated to precise targets bringing good profitability.

The best European beachwear brands are organized accordingly and, as Giuseppe Reginato of Argentovivo underlines, "We think of a comprehensive beach fashion in 360 degrees, for a clientele that is increasing, we propose a total beachwear look that is renewed each season and that through advertising campaigns communicate an image where the reference consumer recognizes herself."

## New atypical sales channels are growing for beachwear

We have seen that sport and wellbeing are different but complementary worlds. In the scope of distribution, they generate new sales possibilities in relation to the new consumer. They are still not classified precisely in statistical terms with a voice of their own in any country, but the sales of these new sales channels in terms of volume and value are increasing. We are talking about new sales channels connected to leisure time, wellbeing, sport, owned by the structures themselves or independent people who manage them internally. They are often found in gyms, sports centers, spas and luxury hotels. The consistency of their offer in relation to location and consumer generally succeeds in terms of profit. Many confirm their importance in this sense: "New quality stores and boutiques

in spas that offer top-of-the-range products are channels which are growing significantly," confirms Tricia Jones of Seaspray.

Another confirmation of the increasing interest in these new channels comes from Carlo Pezzotta of Domani: "We are developing new distribution channels, such as boutiques in luxury hotels, an example of this is the Grand Hotel of Ravello in Italy, while in France we are successfully experimenting with thalassotherapy centers."

## Sports stores extend their product offer

The importance of sports stores in the sales of swimsuits and beachwear, although increasing, varies varies between countries. This French example can help us to understand this evolution. Beachwear distribution in France is atypical, the importance of certain channels moves it away from the classic TA of lingerie and clothing. In France, chain stores and lingerie distributors are rather hesitant to place emphasis on this product, while emphasis is placed on sports stores that have 41% of the market share. This unique factor can be explained by the fact that the number one sport in France is swimming, followed by jogging and tennis, especially by women. French women require more fashion content, (also in technical products), this explains the evolution of this sector in the last few years.

Brands specializing in technical swimsuits (pool) and surf suits (beach sports) tend to create more "beachwear" and "modal" collections without however neglecting their special uniqueness which have made their brands famous.

This leads to an important series of cross merchandising actions between pool and beach helping brands to respond to recent store demands. The channels of technical swimsuits in France are mainly made up of flagship stores (stores with their own brand, concept distributors or distributors with a mixed offer of produced brands and their own brands). The most important of these is Decathlon, which today represents over a third of the sports sales in France and according to some sources around 40% of swimsuit volume and is still growing. This is followed by Intersport, also growing and with many new openings expected, and Go Sport. The growing fashion phenomenon also in sports beachwear gives these three distributors new opportunities for diversification and development connected mainly to the integration of a higher fashion content also in the sports area.

This phenomenon is also sustained by the arrival of new players from the surfing world, such as Quicksil-



ver in France or Billabong in Italy. But brands such as Oxbow, Rip Curl and Kanabeach follow, which are increasing and respond in a more modal, fresh and appealing way for a young consumer, to the rather standardized offer coming from the large flagship distributors and to the disappearance of surf stores or independent seasonal stores in seaside locations.

Many of these brands however have sales policies aimed at opening their own retail stores to carry a "brand concept." Therefore, sports distributions in every country are undergoing important restructurings to better integrate the modal aspects of the product. A confirmation of this phenomenon comes from the United Kingdom where some brands, including some of the most famous like Speedo, crushed between large insignias and a ultra sporty image, are opening stores in the most fashionable areas of the cities for a more fashionable image, to shed the "sporty" connotation and to benefit from the commercial position indicative of their desired status.

## The highs and lows of large department stores

The position of the large department store differs from country to country. In some countries they are very important and in others they are of less importance. Large department stores have a certain weight in France, Spain and England resulting from the cultural imprint of the various "national consumers".

Mark Pilkington of Splendour confirms that Britain has distributors who have renewed their offer and are growing. However, it remains an unusual fact for the British market where the beachwear sector is dominated by independent brands rather than private labels (which in Great Britain are typical local department stores with medium-large and medium sized surfaces often assuming a more familiar identity for us than the medium sized surfaces or large specialized surfaces of quality). Even in France, confirms Thierry Muliot of Huit, department stores have made great efforts to renew their structures and stabilize themselves. If Spain and Italy have around 10% of total sales in volume, in France the country of department stores par excellence, instead, they are a relatively interesting channel for beachwear.

## Discount and super-stores suffer two attacks and lose ground...

Large super stores are attacked from two sides although in a very different way from country to coun-

try and despite the growth in some countries and not only on the low end of the beachwear market., Ground has been lost caused by hard-discounters of TA who attack them on permanent products, like for example, lingerie.

Secondly, they are attacked by specialist chain stores that develop products at the same prices as those of the large distributor's own brand, if not lower, but that offer them in fashion environments that are much more qualified (and above all with fitting rooms).

If this phenomenon is important for lingerie, then it is even more important for the beachwear segment.

Furthermore, concerning low cost products, circuits like the markets or traveling salesmen often succeed by pulverized selling, which tends to be more reactive in terms of fashion proposal and for a series of correlated elements.

## Markets and traveling salesmen keep their ground

In the low price segments, but also in the middle, at times depending on the countries, traveling salesmen - expect for France, which has an almost non-existent circuit - represent around 10% of distribution in value terms. Without specific changes in the last few years this circuit is a good cushion for many companies and traders in relation to their stock but, in some countries, the offer increases in terms of fashion proposals.

## Chain stores evolve but not everyone manages to sell beachwear...

Chain stores are nearly the majority in western countries, and the number one distribution circuit for beachwear, but in value terms it must be clarified: as a rule, research institutes also include single-branch chain stores of luxury brands or designer labels in this item as well as distributions chains arranged vertically upstream with their own production mix and often with third parties (H&M, Zara, etc...).

Obviously, the positioning of these sales points is very different, which are instead classified globally in the same way as insignia chains of distributing groups or conceptors/distributors.

If, besides the single-brand sales outlets or designer labels, in fact insignias like H&M, Zara, or more recently Mango for example, offer together with their external clothing more and more beachwear lines (after having done it with lingerie because it produces similar sales, or accessories, shoes and leather

goods...) to diversify their offer and develop the elements that attract the consumer, the chains specialized only in lingerie do not do this, or do it very little.

The reason why chain stores specializing in lingerie - that in some countries have become very important players in the field - are unable to develop an interesting beachwear offer does not seem connected only to the study and development of products closer to the external clothing world, but in actual fact seems to come from low profitability per square meter/year, too low for the chain stores specializing in lingerie whose surfaces are on average smaller than multi-product insignia stores.

If in fact, on large surfaces, the area dedicated to beachwear can extend or reduce itself in relation to the seasons and to assume more fashion aspects connected to the surrounding environment in terms of merchandising, in the chains stores specializing mainly in lingerie beachwear becomes a segment that fluctuates too much and gives results that are too uncertain for real development.

If chain stores like Zara and H&M can integrate beachwear by playing on the sales surfaces, the same risk cannot be taken with the smaller surfaces of chain stores specializing in lingerie; without taking into consideration that a wider offer allows a bad beachwear season to be balanced by accessories or clothing, while lingerie sellers do not have this advantage.

Despite these aspects Juan Herrera, Marketing Director of Confecciones Ory underlines that the appeal of these commercial formulas attract and educate a young consumer to a different type of purchase connected more to quick turnover of proposals than to the content and value of a brand.

## Sales at a distance changes form

Sales at a distance is taking the place of mail-order, by integrating the internet aspect.

Although all the distribution channels have more or less reported a holding of the positions if not an increase in sales, mail order has lost ground mainly due to the new competition coming from internet.

This is confirmed by Tricia Jones, General Manager of Seaspray: "In terms of trend, we see a lot of interest in internet sales and its growth is having a negative effect on mail order sales due to an increased usage and an increase in customer service."

Mark Pilkington of Splendor also confirms this viewpoint: "We meet a lot of consumers on the internet, mail order sales are declining and can only hope to survive by going on-line..."

## Quality distribution for a brands' market

Beachwear distribution seems very specialized in its various facets and due to its very "modal" nature. Although, as highlighted by Mark Pilkington "to produce quality items is now a global business and quality is widespread" The origin of the product does not seem to worry consumers very much, distribution channels prefer brands with added value because more and more consumers want valid brands, full of content that keep the promises of uniqueness, comfort and contemporary style. Jan Jessner, Export Manager of Bruno Banani agrees: "A determining factor in the success of beachwear is undoubtedly innovative products, exclusive materials and designs."

This is his specific job to choose the operators. The fashion content is becoming more important and increasingly more decisive, even in the sports and technical fields and brings a large amount of factors that are hard to manage commercially by large distribution groups, by vertically arranged chains and organized distribution. This favors a more fragmented and qualified distribution. It is an advantage for quality European brands and for quality production worldwide.

Source: Linea Intima, CYL Moda Intima, Intima, Underlines, Sous Fashion Lingerie, Fashion Panel, SMI, SMI-SitaRicerca, Eurovet-IFM-Ctcoe.