

Re_fashion

Lingerie Collective

Customer survey summary

EDITO

With over a billion items sold in 2023, or almost a third of all Textiles, Household Linens and Footwear items on sale, lingerie represents a significant share of the market in France. However, the obstacles to the circularity of these products were numerous: insufficient collection, limited repair, complex recycling... All of which seemed, until now, impossible to overcome.

And yet, in June 2023, voluntary, motivated and forward-thinking players approached Refashion to explore solutions. With this in mind, Refashion brought together 11 brands, the Fédération de la Maille, de la Lingerie & du Balnéaire and the Institut Français de la Mode, du Textile et de l'Habillement, the industry's technical center, within the Lingerie Collective to initiate a joint reflection process.

Where everything seemed complicated, the cooperation of the brands, structured support, dedicated work sessions and the collective involvement of the players in the value chain have enabled real progress to be made for the entire sector.

In the space of a year, with funding from Refashion, support from Bluequest, the expertise of the Refashion teams and the mobilization of brands and companies in the sector and their professional representation, we have built up resources that we are delighted to share with you today.

A huge congrats to all participants! Here are a few levers for action...

Together, let's change the world for a desirable futur.

Hélène DARET, Director, Refashion Brands Division

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Introduction

In 2023, of the 3.25 billion products sold on the French market, over a billion will be lingerie products. Complex materials, disruptions to recycling and hygiene-related obstacles are just some of the challenges to be overcome in order to extend the life of these products and limit their environmental impact at the end of their life. Yet solutions do exist to make this sector more virtuous, through repair, reuse and recycling.

With this in mind, Refashion launched the Lingerie Collective in 2024, an initiative dedicated to supporting industry players towards sustainable and innovative practices, in order to rethink the future of lingerie under the prism of the circular economy.

The Lingerie Collective is the fruit of a year's reflection by a working group of 11 lingerie brands, enriched by the contribution of two industry experts, the Fédération de la Maille, de la Lingerie & du Balnéaire and the Institut Français de la Mode, du Textile et de l'Habillement.



Context & survey framework

As part of the Working Group, the brands of the Lingerie Collective carried out an online survey of their French customers to better understand their expectations and any obstacles to repair. The survey also analyzed the reasons for the end-of-life of lingerie items, habits in terms of drop-off at collection points, and perceptions of recycled materials. With over 18,250 respondents, the survey revealed key trends, providing valuable insights for structuring appropriate solutions.

This survey was relayed through the newsletters and social networks of the brands in the working group, targeting consumers of lingerie (entry-level, mid-range and premium) between June and September 2024. This is therefore a raw sample, not representative of the all lingerie-corsetry buyers, as respondents may be customers of several brands.

Age distribution of respondents:

→ **18,250 respondents:**
95% women and
5% men

Age range	% of respondents
- 18 years old	0.10%
18 - 24 years old	1.5%
25 - 34 years old	6.88%
35 - 44 years old	17.24%
45 - 54 years old	27.05%
55 - 64 years old	26.67%
+ 65 years old	20.56%




1_ Sample characterization

Point of attention


As the panel of respondents were mainly customers registered in the loyalty program and therefore regular buyers of lingerie-corsetry items, the following results are specific to the sample surveyed.

1.1_ Purchase frequency

«On average, how often do you buy these items (for yourself)?»

	Several times a year	Once a year	Every 2 years	Less often	No opinion
Bras,panties...	66.4%	25.5%	5.4%	2%	0.6%
Swimwear	5.5%	37.7%	31%	19.5%	6.4%
Socks / tights	54.9%	19.1%	8%	9.2%	8.7%

→ 17,369k out of 18,25k people answered this question


	Several times a year	Once a year	Every 2 years	Less often	No opinion
Boxer shorts	41.2%	35.2%	13.4%	5.2%	5%
Swimwear	3.9%	18.7%	23%	31%	23%
Socks	38.5%	26.6%	10.8%	9.6%	14.6%

→ 827 out of 18,25k people answered this question


Purchase frequency for the panel surveyed **appears to be relatively high**, particularly for lingerie products (bras, panties) and boxer shorts, while swimwear purchase frequency is lower.

1.2_ Purchase price

«On average, at what prices do you buy these items?»

	- from €10	€11 to €15	€16 to €25	€26 to €35	€36 to €45	+ from €45	No opinion
Bras	0.5%	2.8%	13%	31.4%	26.5%	23.9%	1.9%
Underwear (shorty, panties...)	10.4%	26.7%	35%	16%	6.2%	2.5%	3.2%
Swimwear	0.7%	1.4%	6.8%	18%	18%	43%	12%
Socks / tights	36%	32%	12.6%	3.3%	1.1%	0.6%	14%

→ 17,369k out of 18,25k people answered this question

	- from €10	€11 to €15	€16 to €25	€26 to €35	€36 to €45	+ from €45	No opinion
Boxer shorts	13.3%	27.8%	33%	12.8%	2.9%	1.8%	8.3%
Swimwear	3.3%	7%	20%	19.3%	8.7%	7.7%	33.9%
Socks	32.7%	32.8%	12%	2.4%	0.5%	0.9%	18.9%

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The highest purchase prices are for women's swimwear (43% at over €45), followed by bras (50% at over €36).

In comparison with the data provided by Kantar*, the panel of customers interviewed for the Lingerie Collective survey have a higher propensity to buy at higher prices. According to the Kantar study, the average purchase price for underwear (socks, tights, lingerie stockings and bras) is **€5.4 for men and €8.9 for women**. The high-end segment, with an average price of **€42**, represents **3% of purchases in volume and 16% in value for women**. For men, this share is slightly lower, at **2% of volume and 11% of value**.


*Price range study on TLC - Kantar - Data 2023




2_ Lifespan and most common deterioration

2.1_Lifespan

«In general, how long do you wear these items?»

	- from 1 year	1 to 2 years	2 to 5 years	+ 5 years	No opinion
Bras	2.8%	28%	51.3%	16.3%	1.4%
Underwear (shorty, panties...)	6.9%	33%	44%	13.6%	2.3%
Swimwear	1.5%	17.4%	48.5%	22.9%	9.7%
Socks / tights	25.4%	34.2%	21.4%	6.3%	12.6%

→ 17,369k out of 18,25k people answered this question

	- from 1 year	1 to 2 years	2 to 5 years	+ 5 years	No opinion
Boxer shorts	9.2%	41.8%	37.9%	5.2%	5.9%
Swimwear	2.8%	15.4%	35.9%	18%	27.9%
Socks	17.4%	37.9%	24.2%	4.5%	16.1%


→ 827 out of 18,25k people answered this question

Most women keep **their bras and swimwear between 2 and 5 years**, with disparities between ages:


- **Younger women are more likely to keep their bras for more than 5 years:** almost 29% of under-25s and 25-44s say they keep their bras for more than 5 years, versus only 8% of over-55s and 18% of 45-54s.
- **The under-18s keep their swimsuits for shorter periods:** 50% keep them for between 1 and 2 years, while the rest of the age group keeps them for between 43 and 50% between 2 and 5 years.
- **Men's items lifespan is lower.** However, young people seem to keep their underwear longer: 32% of 25-34 year-olds keep their boxers for more than 5 years vs. less than 10% for other age groups. A similar observation applies to 18-24 year-olds, 78% of whom keep their underwear between 2 and 5 years, versus 40% for other age groups.
- **The lifespan of socks is relatively shorter** than the other product types.

2.2_ End-of-life causes

«In general, for what reasons do you part with these items or stop wearing them?»

	To change style, color...	My size is changing	The item is damaged, worn out	No opinion
Bras	20.4%	25%	78%	1.5%
Underwear (shorty, panties...)	16.2%	14%	83.7%	2.4%
Swimwear	35%	16.4%	52%	10.8%
Socks / tights	8%	1.7%	81%	12.5%

→ 17,369k out of 18,25k people answered this question

	To change style, color...	My size is changing	The item is damaged, worn out	No opinion
Boxer shorts	17.5%	7.4%	86%	5.4%
Swimwear	22.7%	9.7%	44.4%	30.4%
Socks	6.5%	0.7%	81%	14.8%

→ 827 out of 18,25k people answered this question

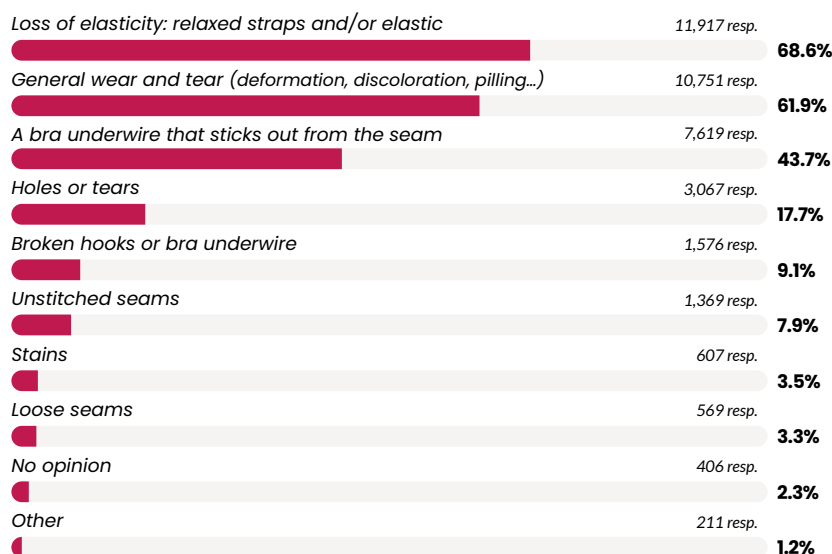
Deterioration, wear and tear are the main reasons for end-of-life.

Nevertheless, **the impact of style («to change style, color...»)** remains significant for swimwear (35% for women and 22.7% for men) and bras (20.4%). Size remains a significant factor for bras (25%).

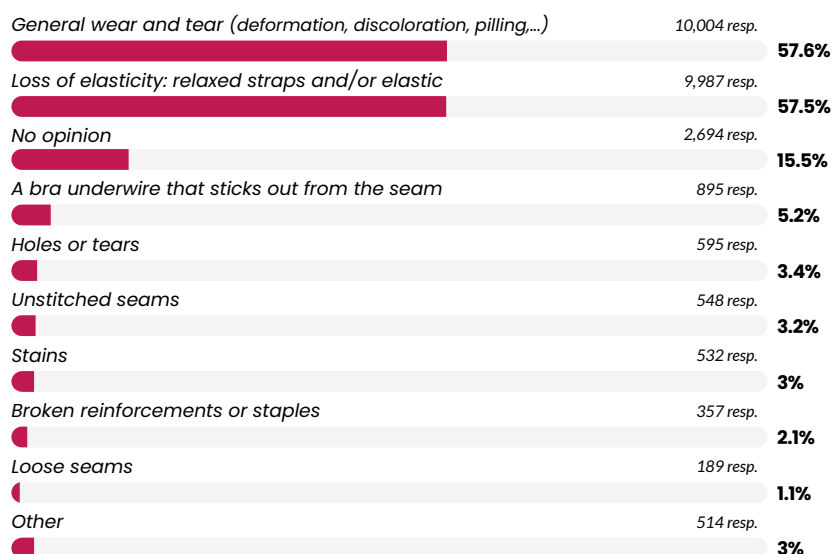
Responses are not correlated with age, except for swimwear, where the change in style/color is much more pronounced, particularly for 18-44 year-olds, who rank it as the 1st cause of end of life.

«Concerning the following items what are the most frequent deteriorations you notice?»

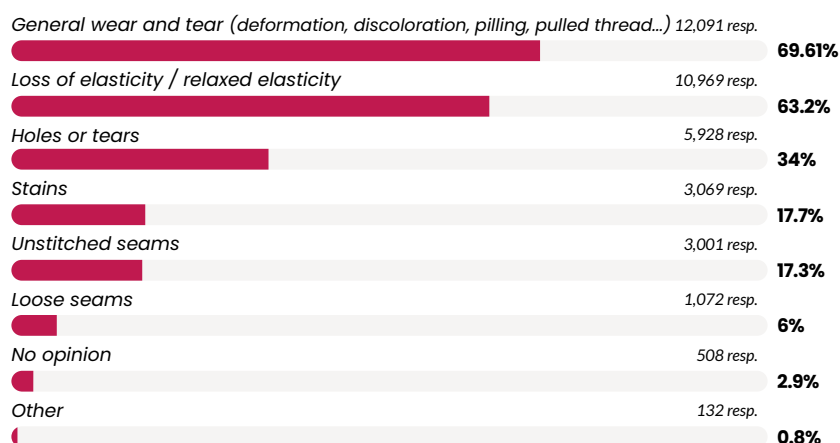
BRAS



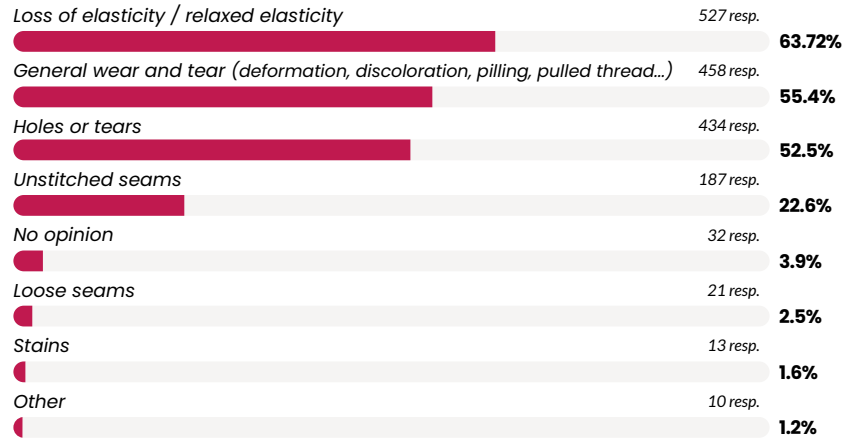
WOMEN'S SWIMSUIT



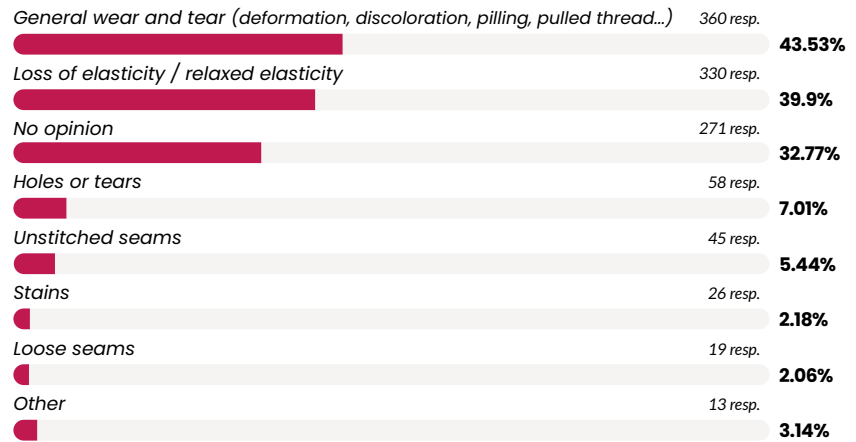
WOMEN'S UNDERWEAR (PANTIES, SHORTS...)



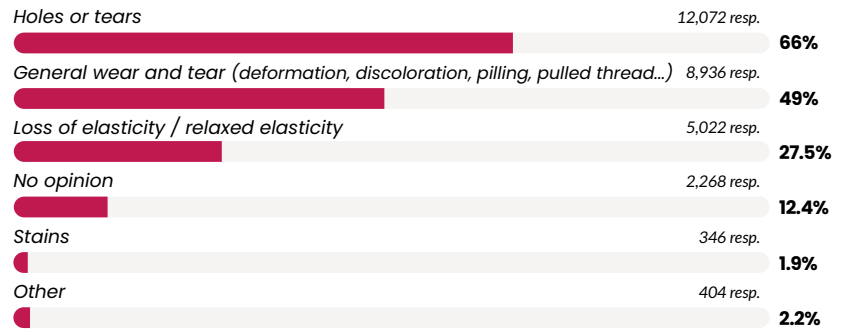
MEN'S UNDERWEAR (BOXER SHORTS)



MEN'S SWIMSUIT



SOCKS







3_ Repair practices and perceptions

3.1_ Habit and interest in repairs

«Have you ever repaired or had these items repaired?»


	Never	Rarely	Often	Very often	No opinion
Bras	66%	24.3%	7.3%	1.5%	0.9%
Underwear (shorty, panties...)	80.4%	13.7%	3.7%	0.9%	1.2%
Swimwear	74.6%	17.8%	2.4%	0.6%	4.6%
Socks / tights	68%	17.6%	8.2%	2.2%	4%

→ 17,369k out of 18,25k people answered this question

	Never	Rarely	Often	Very often	No opinion
Boxer shorts	80%	12.8%	3.9%	0.3%	3%
Swimwear	73.5%	6.2%	0.6%	0.3%	19.4%
Socks	65.9%	15.6%	5.1%	1.7%	11.7%

→ 827 out of 18,25k people answered this question

«Would you be willing to have these items repaired if there were accessible and reliable repairers?»

	Not interested	Interested	Very interested	No opinion
Bras	49.2%	36.8%	8.9%	5.1%
Underwear (shorty, panties...)	73.7%	16.5%	4.1%	5.6%
Swimwear	48.2%	35.6%	7.8%	8.4%
Socks / stickers	68.9%	18.5%	5%	7.6%

→ 17,369k out of 18,25k people answered this question

«Would you be willing to have these items repaired if there were accessible and reliable repairers?»



	Not interested	Interested	Very interested	No opinion
Boxer shorts	67.9%	20.3%	3.1%	8.7%
Swimwear	58%	16.8%	3.5%	21.7%
Socks	61.7%	18.7%	4.6%	14.9%

→ 827 out of 18,25k people answered this question

Repairing is very little practiced, and customers are at first sight «not interested». This trend can be partly explained by the fact that repairing lingerie is not yet part of consumer habits.

Interest is lower among men, with **between 22 and 23% saying they are interested to very interested in general.**

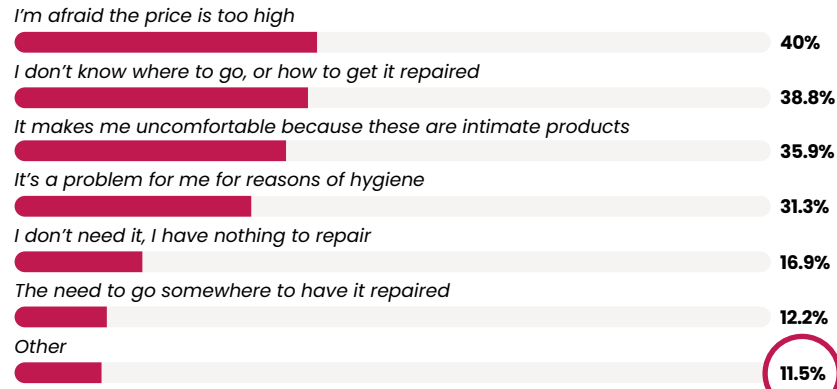
Nevertheless, women seem more interested in certain product types: **46% «interested to very interested» in bras, and 43% «interested and very interested» in swimwear.**

A focus on customer age reveals an interesting trend: **the younger the target, the greater the interest.** For all types of products, although this craze is slightly less pronounced among the under-18s.

	Bras interest	Underwear (shorty, panties...) interest	Swimwear interest	Socks interest
- 18 years old	56%	39%	50%	11%
18-24 years old	75%	33%	74%	26%
25-34 years old	71%	30%	66%	33%
35-44 years old	59%	26%	54%	27%
45-54 years old	50%	22%	45%	24%
55-64 years old	38%	17%	34%	18%
+ 65 years old	29%	12%	26%	12%

3.2_ The main obstacles to repair


«What stops you most from getting your underwear and/or swimwear repaired, today?»
(multiple response)




Price and the lack of a known repair service top the list of identified obstacles, followed by the notion of **intimacy and hygiene**, which hinder people from taking action. We note that **few feel they don't need to call on a repair service** (17%).

3.3_ Conditions for promoting repair practices

«What price would you be willing to pay to have these items repaired?»

	- from €5	€6 to €10	€11 to €15	€16 to €20	+ from €20	No opinion
Bras	33.7%	27.1%	6.3%	1.6%	0.9%	30.8%
Underwear (shorty, panties...)	46.3%	9.2%	1.4%	0.95%	0.1%	42%
Swimwear	26.8%	23.5%	10.7%	3.1%	0.8%	35.2%
Socks / tights	49.4%	5.2%	0.6%	0.2%	0.1%	44.6%

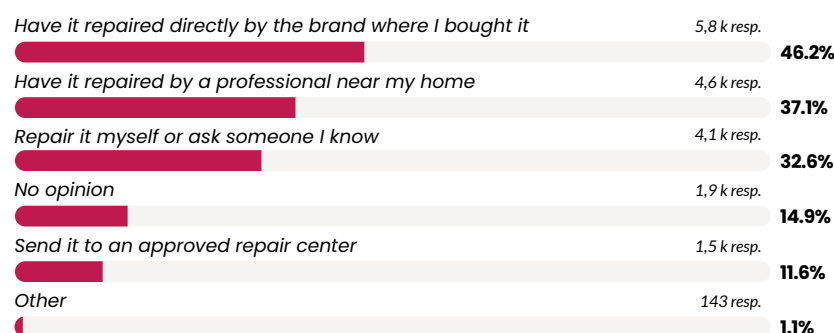
→ 17,369k out of 18,25k people answered this question

	- from €5	€6 to €10	€11 to €15	€16 to €20	+ from €20	No opinion
Boxer shorts	36.3%	10%	1.7%	0.4%	0%	51.5%
Swimwear	23.7%	11.1%	3.5%	0.8%	0.4%	60.4%
Socks	37.9%	4,8%	0.7%	0%	0%	56.6%

→ 827 out of 18,25k people answered this question

Prices are unanimously positioned **at less than €5**, with an opening to **higher prices for bras and women's swimwear**. It should be noted that a **high proportion «have no opinion» on the price**.

«If you had to have one of your items repaired, what would you prefer?»



→ 18,25k out of 18,25k people answered this question


The customers surveyed prefer to **have their products repaired by the brand they bought them from, before turning to a professional repairer**. A significant proportion repair «themselves or through friends and family». Few, on the other hand, consider sending the product to a repair center.




4_ Consumer practices and perceptions regarding the end-of life of lingerie items

4.1_ Collection

« When you stop wearing these items, what do you usually do? »

	I keep them in my closet	I give them to my surroundings	I give them away to associations	I sell them second-hand	I throw them in the domestic waste	I drop them off at collection points	I drop them off at a retailer for collection	No opinion
Bras	13.2%	5.3%	17.6%	2.5%	38.9%	39.1%	3.1%	1.2%
Underwear (shorty, panties...)	6.1%	1.9%	7%	0.4%	63.3%	27.7%	1.2%	1.7%
Swimwear	10.7%	5%	14.1%	5%	32.7%	38.1%	1.7%	4.7%
Socks / tights	3.4%	1.1%	4.7%	0.3%	68.2%	21.9%	1.3%	4.8%

→ 17,369k out of 18,25k people answered this question

	I keep them in my closet	I give them to my surroundings	I give them away to associations	I sell them second-hand	I throw them in the domestic waste	I drop them off at collection points	I drop them off at a retailer for collection	No opinion
Boxer shorts	4.5%	0.8%	7.5%	0.3%	49.9%	38%	0.7%	3.7%
Swimwear	5.1%	1.4%	7.9%	0.8%	35.1%	36.3%	0.3%	18.2%
Socks	2.7%	0.6%	3.8%	0%	53.9%	30.3%	0.7%	11.4%

→ 827 out of 18,25k people answered this question

Collection varies from item to item: just under 40% of respondents drop off their **bras, swimwear and boxer shorts**.

For all product types, **except swimwear, putting them in household waste tops the list**: 63% of responses for women's underwear, almost 50% for men's underwear, over 68% for women's socks and almost 54% for men's socks. This figure is lower for bras, but still substantial, with over 38% of responses.

A significant proportion of women donate their bras and swimwear **to associations or keep them in their closets**.

Depositing at stores and second-hand sales are very rarely practiced.

What would help to collect more underwear, swimwear and socks into collection points, so that they can be reused, recycled...?



Overcoming hygiene-related obstacles

«They will still be wearable out»

«If my lingerie is worn out, I throw it away. If it's still acceptable, I put it in collection point»

«Underwear can only be worn by one user, for reasons of hygiene. You can't give away your underwear unless it's new and never worn. So I put them in the household waste»



More collection points nearby...

«Having a container next to my house, the one that existed has been removed, I'm not going to take transport to my house again; Before Covid, there used to be an association, now there's nothing»

«Having a collection point in my neighborhood»

«More communication about collection systems, and more places to drop them off»



More information about used clothing

«We need a bit more advertising to guide people to this kind of depot. We don't always know whether to put torn clothes in»

«We need a bit more advertising to guide people to this kind of depot. We don't always know whether to put torn clothes in»

«To know that you can drop off. To really know if the clothes are recycled and how it goes for damaged items, items with holes»




Find out more about what's done with the clothes we collect

«Have clear info on what clothing recyclers do with donations. We don't know whether they're sold, thrown away or recycled»


«To be sure that recycling takes place in France and not that items travel thousands of kilometers for «eventual» recycling or reuse»

4.2_ The second hand

«Would you be willing to buy these items second-hand, if the price and style appeal to you?»

	Certainly	Probably	Not at all	I don't know
Bras	10.1%	14.1%	69.2%	6.6%
Underwear (shorty, panties...)	3.1%	4.2%	88.1%	4.6%
Swimwear	8.8%	18.5%	64%	8.6%
Socks / tights	4.4%	8.2%	80.2%	7.1%

→ 17,369k out of 18,25k people answered this question

	Certainly	Probably	Not at all	I don't know
Boxers, caleçons	3.9%	5.6%	84.4%	6.1%
Swimwear	4.6%	8.9%	73%	13.5%
Socks	3.5%	6.5%	80%	10%

→ 827 out of 18,25k people answered this question

At first, respondents don't seem at all ready to turn to second-hand purchases. But **an opening in the bra and swimsuit segment is visible**, with:

- **24% of respondents are «definitely to probably» willing to buy bras second-hand;**
- **27% of respondents would «definitely to probably» buy second-hand swimwear.**

A focus on customer age reveals an interesting trend: enthusiasm for bra and swimsuit purchases is much higher among the **18-34 age group**, while the **+ 45 age group is the most reticent** (women's segment).

	Bras interest «Certainly or probably»	Bras interest «Not at all»	Women's swimwear interest «Certainly or probably»	Women's swimwear interest «Not at all»	Men's swimwear interest «Certainly or probably»
- 18 years old	39%	50%	33%	44%	
18-24 years old	57%	37%	54%	38%	55%
25-34 years old	43%	50%	44%	49%	48%
35-44 years old	33%	59%	35%	49%	30%
45-54 years old	25%	68%	28%	58%	22%
55-64 years old	19%	75%	21%		8%
+ 65 years old	12%	82%	15%	74%	8%

«What would encourage you to buy more second-hand underwear or swimwear?»



Nothing... or «first» hand

«Nothing, it affects my privacy»

«Not worn, purchase error or size problem for example»

«It all depends on whether the items are worn or just repaired because they had a defect, for example, especially for stockings, for a swimsuit top no worries for second hand from my point of view, for panties»



Under certain conditions: products, prices, sizes...

«I wouldn't buy stockings second-hand. For bras, you have to be sure of the condition of the product, which is complicated on Vinted. For swimwear, you have to try it on, which is difficult when you go through a second-hand app»

«bras yes, panties no»

«Price and availability in large sizes»



A guarantee of hygiene and quality

«to know that a disinfectant treatment, for example, has been could change my mind»

«To be reassured about hygiene»

«a guarantee of restored product quality»

«To be sure that they are cleaned and even disinfected, that they are in very good condition, of good quality, in a clean, tidy place»



A well-presented offer, accessible in physical locations so that you can try them out and see them for yourself

«So I can try them on or return them if they don't fit»

«Quality parts, original styling and French manufacturing»

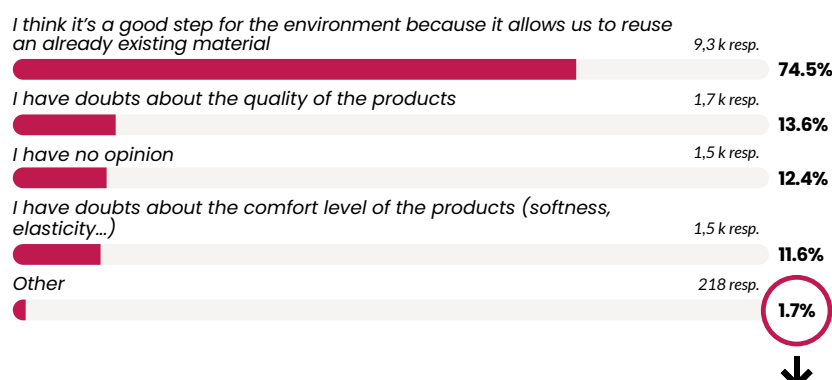
«To have stores that carry them, that I can find easily»

«To have more on offer (washed and better presented)»

«The «simple» possibility of seeing, touching and trying on these items that don't fit every body type. It's not for nothing that there are specialized boutiques»

4.3 _ Perception of recycled materials

«What is your opinion regarding underwear and/or swimwear containing recycled materials?»



→ 18,25k out of 18,25k people answered this question

Conclusion

Rich insights to contribute to the work of the Lingerie Collective

This survey, carried out among French customers of the Collective's brands, represents a raw sample and is therefore not fully representative of the global lingerie market. Nevertheless, it does reveal some interesting trends:

- **There are wide disparities between product types : swimwear and bras offer** strong potential, while underwear and socks face more obstacles, particularly in terms of repairs and second-hand goods.
- **A younger generation, more open** to repairing and buying second-hand.
- **More collection** points, better communication and greater transparency on product destination and acceptance criteria.
- **Repair is attracting interest, particularly for bras and swimwear**, and among younger target groups. While the practice remains relatively rare, expectations are high in terms of price, branded services and proximity.