

*Same Kents*

*This is great!  
The you shows*

*Vanity Fair*  
I N T I M A T E S

**Marketing Intelligence**

# Overview

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- 1995 Year in Review
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# Mission

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Information services that will support brand positioning and the product development process.

- ▶ Market Segmentation Analysis
- ▶ Channel Analysis
- ▶ Brand Assessment
- ▶ Concept Analysis

# Tools

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- ▶ NPD: Panel and POS data
- ▶ CME: Interview data for VF Corp Gold Standards
- ▶ Product Testing: Internal and External Consumer Testing
- ▶ Internet: VF Home Page
- ▶ Focus Groups
- ▶ Mall Intercepts

*Target Marketing*  
*Price Perception*  
*Market Share*  
*Brand Awareness*  
*Intent to Re Purchase*

# 1995 Year in Review

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Vanity Fair	YTD '95	Point Change
Bras	8.6	-0.5
Pants	9.8	-0.8
Shapewear	7.3	-0.1
Daywear	39.5	+2.3

## Issues:

- VF is growing at less than the market average in all SBU's except Daywear.

# 1995 Year in Review: Bras

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Overall total volume in department stores in 1995 was \$712,196,000, up 5.7% over last year.

Major Competitors	Dollar Share	Average Price
Warner's	15.6	\$14.15
Bali	14.8	\$15.31
Maidenform	12.7	\$15.59
Olga	11.1	\$16.41
Playtex	10.5	\$15.17
Vanity Fair	8.6	\$14.69

## Key Notes:

- Warner's overtakes Bali to become the leader in the department store bra segment, though both lose marketshare.
- VF's position remains unchanged versus last year.

# 1995 Year in Review: Daywear

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Overall total volume in department stores in 1995 was \$167,497,000, up 1.9% over last year.

Major Competitors	Dollar Share	Average Price
Vanity Fair	39.4	\$12.36
Warner's	8.8	\$9.78
Jockey	6.8	\$8.16
Movie Star	6.8	\$15.79
<i>Calvin Klein</i>	5.0	\$18.33
O'Bryan/Lorraine	4.3	\$12.92

## Key Notes:

- VF retains number one position and grows beyond industry pace with a 2.8 share point increase.
- Calvin Klein jumps from a number 16 position in 1994, increasing share by 4.1 and average price by \$5.21.

# 1995 Year in Review: Pants

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Overall total volume in department stores in 1995 was \$314,276,000, up 9.0% over last year.

Major Competitors	Dollar Share	Average Price
Jockey	24.1	\$4.70
Maidenform	12.8	\$4.69
Vanity Fair	9.7	\$4.29
Warner's	8.6	\$4.07
Bali by Hanson	7.9	\$5.22
Olga	5.8	\$7.63

## Key Notes:

- VF falls slightly, losing less than one point. This is far below the industry pace.
- Key brands to watch include Calvin Klein, International Intima, Formfit, French Dressing, Myonne, and Age Group due to significant increases.

# 1995 Year in Review: Shapewear

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Overall total volume in department stores in 1995 was \$85,933,000, up 2.8% over last year.

Major Competitors	Dollar Share	Average Price
Subtract	36.3	\$17.32
Bali	21.3	\$10.46
S. Adler/Smoothie	9.3	\$26.52
Olga	8.7	\$19.35
Vanity Fair	7.3	\$14.11
Playtex	6.2	\$15.40

## Key Notes:

- Smoothie jumps from number 6 in 1994 to number 3.
- VF is looking at key initiatives in this area for 1996.

# 1995 Year in Review: Highlights

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- Pants showed largest increase versus 1994 of all SBU's with 9.0% growth. This will be a key area to watch in 1996.
- Calvin Klein becomes a major competitor in the marketplace across SBU's. They are not a niche product anymore, as they more than double marketshare in bras and daywear.
- Wonderbra 7161 overtakes Bali 180 for the number one bra style in dollars and units, even with a significantly higher pricepoint. This specialty product has become a staple.

# **Conclusion**

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Vanity Fair Intimates is moving toward more proactive product development. MI will be contributing to this by recruiting strategic feedback from the sales force.

These new business initiatives will result in better product offerings for consumers giving us more leverage with retailers.