



FEATURED INSIGHTS

DELIVERING CONSUMER CLARITY

HOW MEN SHOP FOR CLOTHES AND WHAT ENGAGES THEM

DRIVERS AND INSIGHTS ON THE MALE APPAREL CONSUMER INDUSTRY

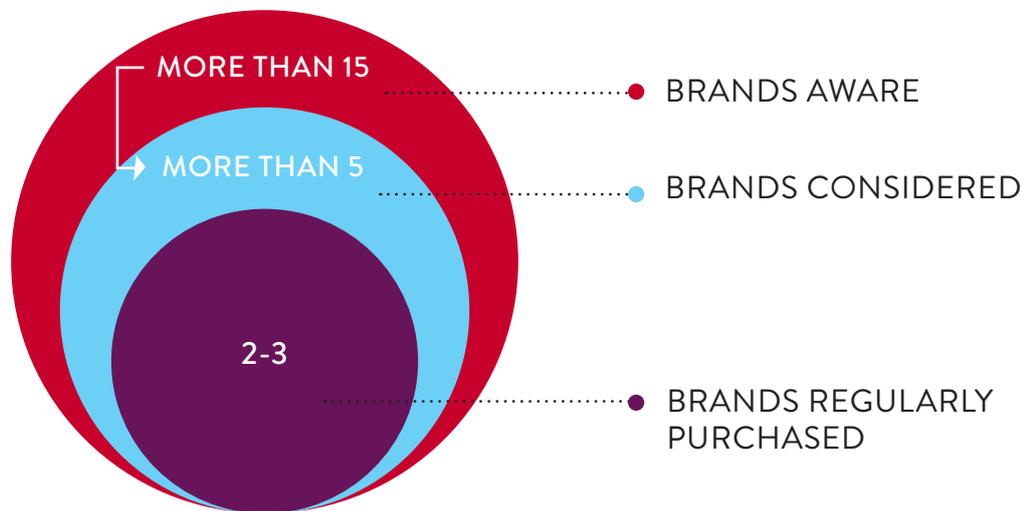
BY: ROHINI SUNDAR, ASSOCIATE DIRECTOR, NIELSEN

- **TODAY'S URBAN INDIAN MEN HAVE STARTED TO TAKE AN INTEREST IN SHOPPING FOR CLOTHES, AND ARE ENJOYING THE EXPERIENCE**
- **THE INTERACTION BETWEEN BRANDS AND MALE SHOPPERS HAS BECOME MORE DYNAMIC**
- **MEN WHO SHOP FOR CLOTHING ARE OPEN TO EXPERIMENTING WITH BRANDS**
- **ONLY ONE OUT OF 10 MALE CONSUMERS ARE MAKING THE RIGHT AD-TO-BRAND CONNECT**

The urban Indian male has started to take his shopping seriously, and he's beginning to enjoy the experience. Considering this segment's purchasing power and impulse buying instincts, the urban Indian male is emerging as a lucrative option for apparel brands. Besieged with home grown and international brands, India's apparel market is ripe for brands to vie for the attention of Indian men. While marketers look to outdo each other in their store branding efforts and work to collect more likes on their Facebook pages than one another, it's essential that they understand how the Indian male interacts with the category before they begin to market to him.

THE FLIRTATIOUS CONSUMER

BRAND INTERACTION - THE INDIAN MALE



Source: Nielsen

Nielsen's studies in the apparel space have shown that Indian men enjoy variety and don't typically tie themselves to a single brand. Once the male apparel shopper is comfortable with a brand's promise and believes in its quality, he adds it to his list of "must check out brands" every time he goes shopping. The male shopper considers five to seven brands when he goes shopping, ultimately settling on two or three brands that he's most comfortable with.

Armed with a list of brands to investigate, the male consumer is somewhat on auto-pilot as he shops, but is highly open to influences, both within and outside the store, when choosing between brands.

The Indian male's flirtatious shopping behaviour has implications for brands looking to market to them. As they move to engage with them, marketers should keep two goals in mind: enter the customer's repertoire of brands and maximize a brand's influence at the store.



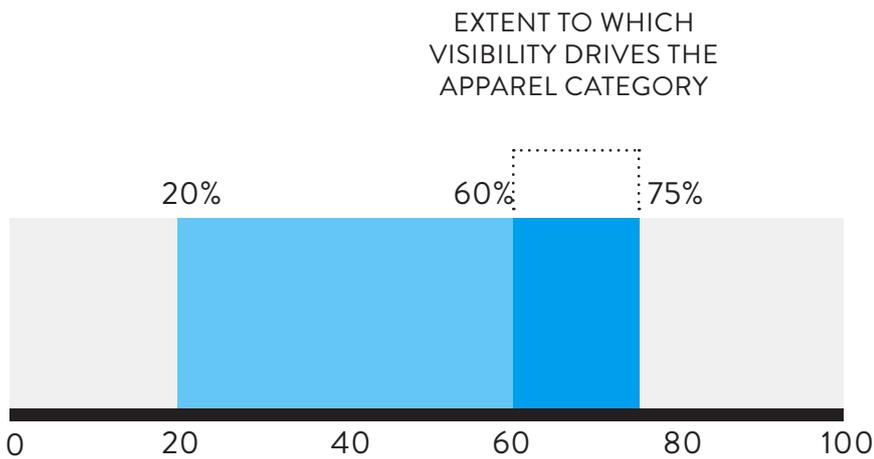
JOB NO. 1: ATTRACT AND RETAIN

The most important task for today's marketer is to stay present in the consumer's life. Brand equity studies across FMCG, financial products, auto and apparel indicate that awareness as a driver of equity can account for anywhere from 20 to 75 percent, depending on how mature and differentiated the category is. When brand image is an important driver of equity, we see a greater differentiation between brands. Comparatively, we see less differentiation in categories where brand imagery is less of an equity driver.

Awareness or visibility of a brand is the most important driver of brand equity in the branded men's apparel the category, and can drive equity by 60 to 75 percent. It's evident from our studies that the male apparel segment is largely undifferentiated, and equity is primarily led by how much a consumer knows of or sees a brand.

**VISIBILITY
IS THE KEY
DRIVER IN
THE APPAREL
CATEGORY**

AWARENESS AS A DRIVER OF EQUITY



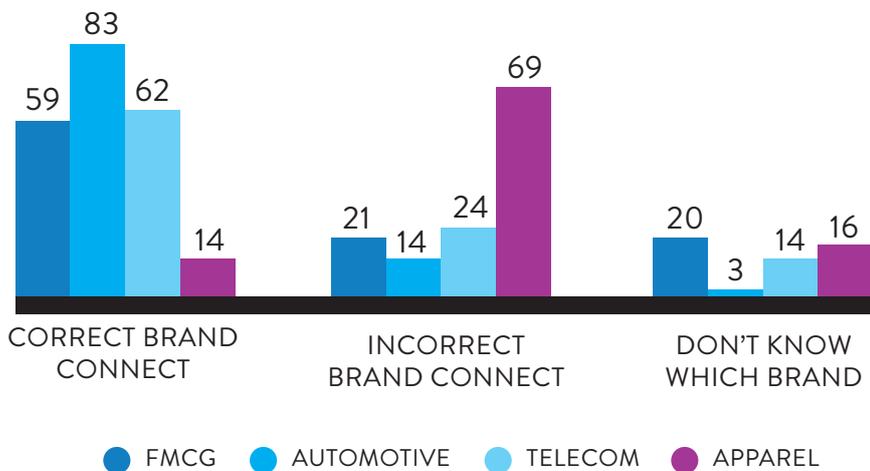
Source: Nielsen

WHAT BRANDS CAN TAKE HOME

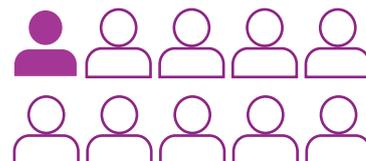
With awareness being significantly important in the category, it's essential for brands to build visibility and familiarity through advertising, retail presence and word of mouth. Advertising in the apparel segment, however, can be challenging, and brands need to see beyond just the cost of advertising. There's also a tendency in the category to have limited differentiation in the advertising, which leaves ads across most brands looking similar. This, in turn, fuels the undifferentiated state of the category.



BRAND CONNECT ON ADVERTISING ACROSS CATEGORIES



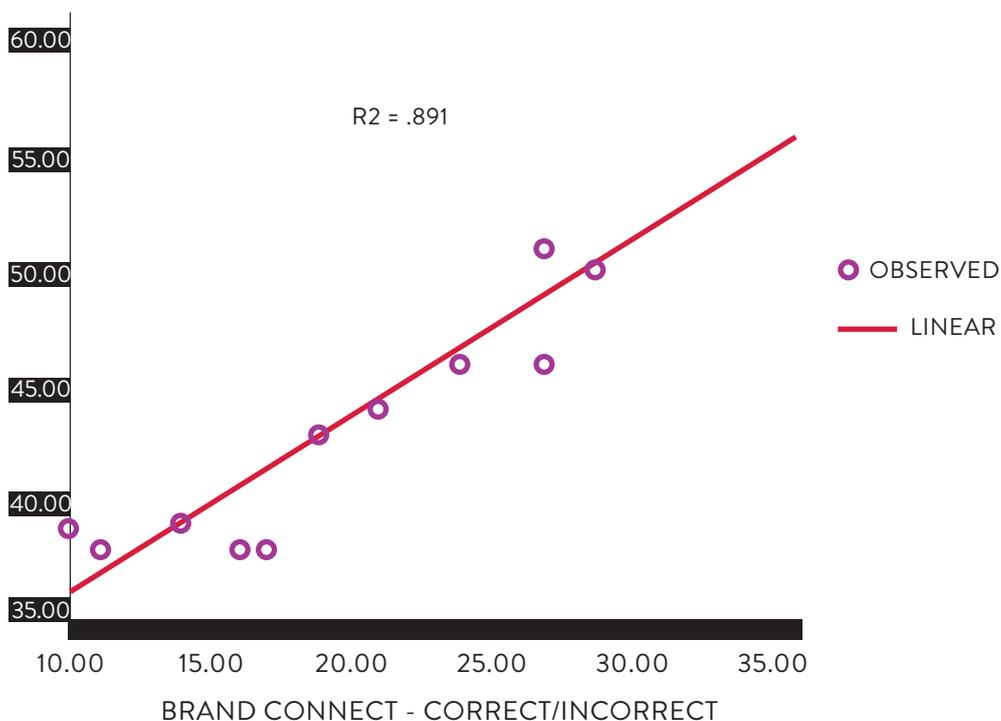
ONLY **1** OUT OF **10** CUSTOMERS MAKE THE RIGHT BRAND-TO-AD CONNECT



Source: Nielsen

In looking at more than 200 studies across categories, it's clear that most male apparel brands face one specific challenge: linking their advertising to their brand. In looking at the connection between brand and advertising, we see that spontaneous awareness (the extent of unprompted brand recall) is directly linked to whether or not a consumer connects the ad with the right brand.

SPONTANEOUS AWARENESS



Statistical analysis (regression) shows a direct and strong relationship between the extent of spontaneous awareness and the correct brand to ad connect.

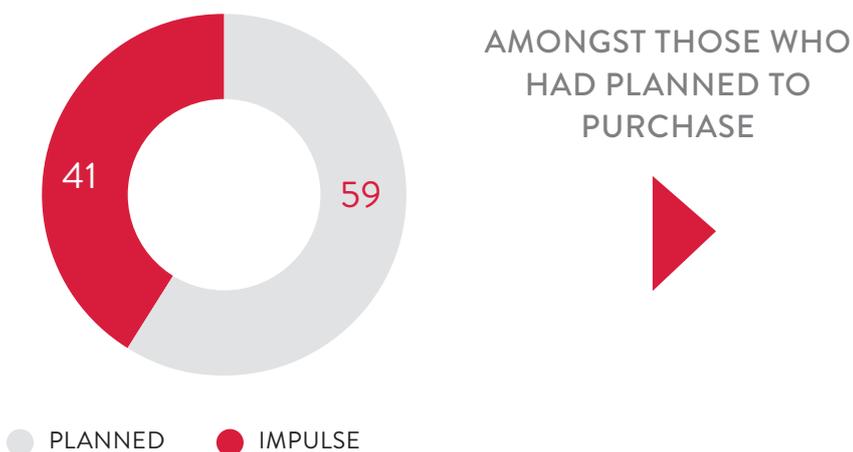
Source: Nielsen

Not only should consumers be able to relate an ad to the brand behind it, but it's critical that they don't misattribute an ad to a different brand in the same category. Therefore, the onus lies on the creative to suitably demonstrate the brand's values in a distinct manner while simultaneously connecting it with that specific brand.

JOB NO. 2: MAXIMIZE THE INFLUENCES AT THE STORE

While advertising works to get a brand onto a consumer's consideration list, it's the actual presence and influence at the store that steers the consumer toward the purchase decision.

PLANNED VS. IMPULSE PURCHASE



AMONGST THOSE WHO
HAD PLANNED TO
PURCHASE



ONLY **1** IN **4**



SHOPPERS DECIDED
ON THE BRAND BEFORE
PURCHASING

Source: Nielsen

Studies on male clothing shopper indicate that a brand can influence in-store impulse purchases by more than 40 percent. This level of impulse stems from the fact that apparel shopping is now an activity of choice for men, as the urban male has stepped away from a previous "don't like to shop" mindset and now actively seeks opportunities to interact with and shop for apparel. And during those trips, they often don't have a pre-decided shopping occasion/mission.

But even if men do set out for something specific, we find that only one in four have decided to seek out a specific brand before they set out to go shopping. The remaining 75 percent of consumers are much more open to see what's out there before they commit to a brand.

Brands in the apparel space know the in-store consumer is an impressionable one and have adopted many strategies to engage them.

MANTRAS FOR SUCCESS

- FOCUS ON BUILDING AWARENESS IN THE CATEGORY
- DIFFERENTIATE ON ADVERTISING BY DEVELOPING BRAND SPECIFIC CUES TO ENSURE BRAND CONNECT

From visual merchandising to brand-specific in-store displays, the ultimate goal of any brand is to gain the consumer's attention and divert him from others. Here too, brands need to understand the consumer's mindset at the store and engineer their efforts accordingly to maximize their appeal.

Studies indicate that close to 40 percent of male consumers purchase apparel on impulse. When probed at length on their attitudes toward shopping for apparel compared with other categories, Nielsen found that 75-80 percent of consumers visit apparel stores to check out what's new. This behavior illustrates a shift from the previous need-based shopping mentality. Indeed, today, male clothing consumers are looking for an experience.

Therefore, it's important for brands to refresh their look at the store by showcasing new products or showcasing existing products in a new way.

The Indian male shopper seems to be finally convinced that apparel shopping can be fun. How marketers leverage this new dynamic will be the key to success in the apparel space.

3 OUT OF **4**



**CONSUMERS ARE VISITING
APPAREL STORES SEEKING
NEW EXPERIENCES &
PRODUCTS**

THE NIELSEN QUALITATIVE VIEW

- SARBANI SEN, ASSOCIATE DIRECTOR, NIELSEN

- Rapid growth and rising urbanization have spawned a new class of consumers with money to spend and a growing need to look stylish.
- Indian men are increasingly embracing the idea of fashion as a means of self-expression. They believe it's important to keep up with trends and are becoming more experimental in their choices.
- Attitudes toward choice of branded apparels are intrinsically driven by concepts of self identity and lifestyle codes. It's a world that encourages one to unravel one's individuality, and celebrate vivid moods and occasions that matter.
- The clothing needs of India's prospering urban consumers have broadened as their lifestyles have evolved, reflecting more varied usage occasions such as party wear, sportswear, gym wear, travel wear, holiday wear and so on.
- In addition to offering comfort, branded apparel often creates a "feel good factor" that's exclusive to a brand.
- Apart from endorsing a certain image, apparel brands help individuals feel socially accepted, recognized and appreciated. They can even instill more confidence.
- Dress codes in the corporate world have evolved in recent years, creating a more liberalized and relaxed environment that allows people to no longer look nondescript.
- Formal wear today includes a wider colour range, and the introduction of smart casuals has made getting dressed up a pleasurable experience for men.

MANTRAS FOR SUCCESS

- **SHOW THE CONSUMER SOMETHING NEW WHEN HE COMES TO THE STORE**
- **SHOWCASE NEW PRODUCTS/DIFFERENT PRODUCTS, UPDATED EVERY MONTH, CATERING TO THE CONSUMER'S NEED FOR A NEW EXPERIENCE**

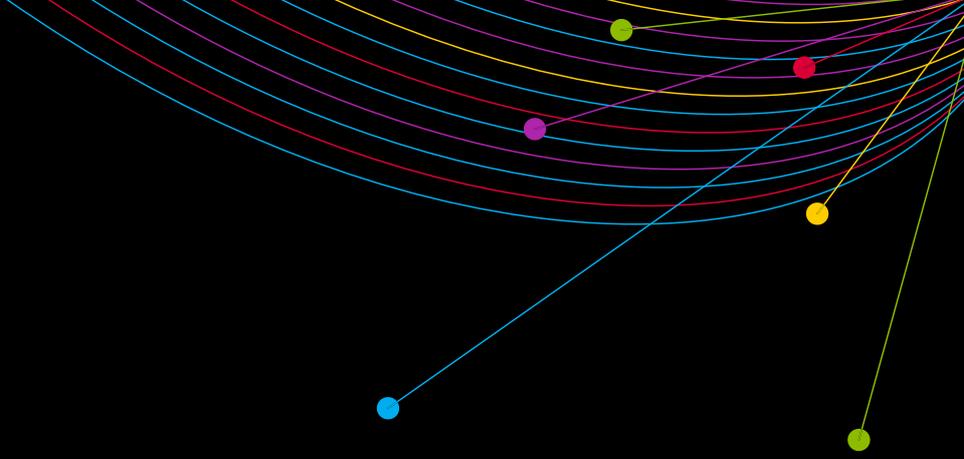
ABOUT NIELSEN

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and related properties. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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OF THE CONSUMER™