

An Analytical Study on Private Brands in Men's Apparel in India

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Abstract: Research is about the factors influencing consumer purchase decision at the store outlet and analysing the relationship between perception, expectation and satisfaction. This study portrays the factors triggering the customers to move on this segment and percolates the major drives responsible for the consumer buying behaviour. The descriptive study using cross sectional data was employed. Totally 500 samples were taken for this study by selecting Chennai, Tamil Nadu as the sampling frame work. Systematic random sampling was chosen as the sampling method using structured questionnaire. Exploratory factor analysis and multiple regression were used as statistical tools for data analysis. Price seems to be the major driving force for the customer to decide the purchase.

Key words: Customer perception • Motivation • Pricing • Branding

INTRODUCTION

Private brands are products that are developed by retailer and made available for sale only through retailer (Baltas, 1997) [1]. Private brands proliferated in a number of product categories especially in apparels. They garnered major market share by challenging the established brands. Private brands helped retailers gain higher margins; added diversity to the product line; differentiated offering; provided higher leverage to negotiate with established brands; and helped to develop strong customer loyalty.

In 1869, Sainsbury (UK) developed the concept of private brands to attract lower income group consumers. These private brands were offered at low price by sacrificing quality. However, due to higher consumer acceptance and retailers willingness, private brands globally account for approximately thirty per cent of total sales and are available at price less than forty per cent compared to national brands. The range of private brands varies from apparel to health, beauty to furnishings and durables to food. The share of private brands to total sales was found to be 15% in USA, 25% in Canada and 50% in Europe (Roy Kisholoy, 2008).

According to Nielsen Research report (2005), globally manufactured brands in majority of the countries grew by two per cent, as compared to five per cent growth rate of

private brands, Migros (Switzerland), Casino (France) and Albert Heijn (Netherlands) are some of the most trusted private brands across Europe.

Observations of different Indian private brands of men's apparel indicate that most of the unit packs bear the brand name of the stores (Raju *et al*, 1995). By appropriate positioning of private brands, retailers can derive higher sales revenue per store. Private brands have been found to increase category profitability, negotiation power of the retailer and consumer loyalty (Roy Subhadip, 2005). There are various routes available to a retailer for ensuring business sustainability. Apart from creating strong differentiation in terms of merchandise range and quality, improving the supply chain and price competition, a retailer can achieve sustainability by developing private brands that are in sync with customer needs and wants.

Private brands offer definite advantages. For private brands, a retailer has greater control over the development process of a product and business. A private brand strategy is an effective option for a retailer for marketing high quality products.

There are various key ingredients that go into the marketing of private brands. They can be mainly classified into two types- rational and emotional. Rational consists of 4P's of marketing, i.e., product, price, place, promotion, brand values and distinct positioning. All these constitute the rational ingredients of private brand

building. The key element constituting the emotional ingredient is communication. A store needs to communicate to customers both within and outside the store. Visual merchandising plays a definite role in communicating with customers within the store and creating a favourable appeal for a private brand, whereas media plays an important role in communicating with customers outside the retail stores.

The private brands market in Europe is worth £ 100 billion. Several factors have contributed to the growth of private brands in Europe. The two prominent factors are: the growing presence of hard discounts and consolidation of the retail industry. Consolidation has created economies of scale, which have been leveraged to develop a wide range of private brands by leading retailers. It has been reported that retailers who have given top priority to the development of private brands have financially outperformed branded goods suppliers in various European markets.

Leading retailers across the globe have gone for effective sub-branding strategies for their private brands. They have added various categories through market segmentation based on price, quality and features. In Europe, sub-branding has been further found to be thematic, based on various social trends and developments. It is further observed globally that low income customers purchase private brands much more as compared to customers belonging to the high income strata. Further, buyers with large family purchase more private brands as compared to nuclear families.

Currently, organized retail in India is estimated to have only four per cent share which is expected to grow at 25 to 30% in the coming years. Thus, with the growth of organized retail in India, the private brands are also expected to grow as experienced in other developed countries. The growth of private brands in India presents an interesting opportunity for the retailer, to understand the motivations of consumers behind the choice of private brands.

The private brands boom is not just restricted to the mature markets, but is also seen in emerging markets like India. Retail chains across the Indian sub-continent have developed private brands to bridge the gaps in their product mix and are increasingly using private brands for catering to regional tastes and preferences. In India, private brands presently contribute to a turnover of Rs. 800 crores. Various retailers have launched their private brands in the recent past and most of them have been either from the food or apparel industry.

Economic growth and emerging young customers who have brand and fashion awareness (Morton, 2002) in Asian markets such as China, India, Japan and South Korea have attracted attention from multinational apparel firms Bryck, (2003) [2]. The consumers in these countries were witnessing many brands in their market. As a consequence they were more sensitive to brands as to what it offered, what it spoke to them and how it addressed their needs.

More choices exist for consumers in types of retail concepts, type of store or channel and specific retailers. The large number of retailers and changes in consumer buying habits has caused the apparel retail market to become over stored, especially the department and specialty channels (Johnson, 2005). More simply, consumer spending was not at the level of demand to support the increasing number of retailers and shopping centres. With the increase in retail store choices, retailer reliance on single product lines and narrow market segmentation led to failure within the industry (Driscoll, 2005). Therefore, the retailer must offer a product that was differentiated from similar products, thus establishing a relative advantage of value to the consumer.

Differentiation was often established through marketing mixes. Many retailers were adding service and segmentation to the traditional product, price, promotion and placement of the marketing mix (Moore and Fairhurst, 2003). Because of the increase of new products to the apparel market, product differentiation was difficult. Retailers look to other factors within the mix, such as service, to establish competitive advantages. With the increase of competition in the apparel retail market, understanding the retail environment and the influences within the retail environment were becoming more important. In addition to products and retail services, it was important to recognize the human factors within the environment, retail associates and consumers.

Schiffman and Kanuk (2007) found that retail store image has images of their own that serves to influence the perceived quality of products that carry and the decision of consumers as to where to shop. These images stemmed from their design and physical environment, their pricing strategies and product assortment. According to Shim and Kotsiopoulos (2009), lifestyle influenced the choice of products and services that met diverse needs and interests rather than confirming to traditional stereotypes [4-18].

This shows that private brands have increased their role and importance and likely to gain more in the future.

Problem Statement: Initial interaction with managers of different private brand apparel stores indicated the failure of different traditional strategies of selling to build customer loyalty. Price discounts, Buy one get one free, customer loyalty bonus points ensured no significant brand loyalty of the consumer. In the words of one of the store managers "Customer is fickle and you just do not know what he will buy". These challenges faced by the store managers combined with the likely high growth of private brand apparels in India prompted the researcher to undertake the research. Extensive secondary data research indicates that there is paucity with respect to different variables that cause customer satisfaction and its relationship with customer loyalty.

Private brands account for about five per cent of the total organized retail market and the potential for their growth is still high. Research reports are available with respect to women's apparel in India; however there is a paucity of research with respect to men's private brand apparel in India as strongly felt by the brand managers of major private brand retail outlets. These trends prompted researcher to undertake present study on Private brands in Chennai relating to the men's apparel. Brands presently contribute to a turnover of rupees seven hundred crores (Roy Kisholoy,

The present research has identified the following problems;

- What are the demographic characteristics of private brand consumers?
- Which psychological factor has an impact on the purchase decision of private brand consumers?
- What are the perceptions of different retail outlets with respect to different offerings?
- What is the relationship between consumer satisfaction and consumer loyalty?
- What is the positioning of various private brands in apparels?

The decrement from research may be used as inputs for marketing strategies by the practitioners.

Objectives of the Study: The challenges faced by men's private brand retail outlets as described in the problem statement and with the help of gaps identified based on extensive literature review provided basis for the following frame work of objectives.

- To examine factors influencing consumer purchase decision at the store outlet.

- To analyse the relationship between perception, expectation and satisfaction.

Limitations of Study: The focus of present study is on isolating psychological factors such as perception, purchase intention, expectation, satisfaction and brand loyalty. However, sociological factors, cultural factors and psychobiological factors which may have impact on the brand loyalty of the consumer are not addressed. This is being done to simplify the decision variables. The study is conducted in Chennai city and may not be generalized for India. Variables considered can be applied universally and may be adopted for further research. Since the market for men's apparel is still in nascent stage to make any concrete inferences [19-30].

Research Methodology

Selection of Study Area: Men's apparel market is 46 percent of the total apparel market in India. Preference for readymade garments is increasing and this has become inevitable with the rise in urbanization. The preference for the branded Western and Indo-western apparels among the working women is on the rise, which is a welcome relief for the manufacturer and retailers of branded apparel. India's Gen Y is increasingly being exposed to Western culture through films and cable television. A large, young working population, growing employment opportunity in different sectors in turn with increase disposable income is likely to offer marketing opportunity for men's private brand apparels.

Chennai unlike other metros of India is traditional with cosmopolitan outlook setting in with advent of high industrial growth. The organized retailing for apparels is facing challenges in the area of demanding customers. The marketing teams face the conundrum of customer satisfaction and brand loyalty as mentioned by majority of the managers. However, they feel that market has potential for robust growth in the coming years as experienced in the case of women's apparel and Private brands such as RMKV, Nallis, Kumaran Silks and Pothys. Some of these retailers have also started men's private brand apparels as part of their brand offering.

Research Design: The research design selected is cross sectional design based on descriptive methodology leading to conclusions. Present study is undertaken to model the consumer behaviour with respect to perception, purchase intention expectation, satisfaction and loyalty. Quantitative research is adopted and an instrument is designed to elicit responses.

Instrument Development: The instrument for research is a questionnaire which is structured and undisguised consisting of following segments;

- Demographic data;
- Purchase behaviour of men's apparel private brands;
- Men's apparel private brand data relating to perception, expectation, satisfaction and brand loyalty.

Sampling Procedure: Systematic Random sampling is used to select sample units. Sample unit consists of males purchasing apparels in six different large format apparel stores in Chennai city. The cross sectional study is adopted and data is collected from respondents during the period December 2009 to June 2010 [31-40].

Sample Size Determination: In the proposed analysis data is predominantly nominal, categorical and ordinal. Bartlett, Kotrlik and Higgins (2001) suggested suitable sample size calculation for such data. For social sciences research alpha level of .05 and the level of acceptable error at 5% is considered. The male people of Chennai city in the age group 21 years to 35 years is obtained from census data from government of Tamil Nadu-2007

Sample size determination (when population is known)

- $Z =$ Confidence level = 2.57(99%)
 $N =$ Total Population = 2435222
 $\sigma_p =$ 2 (Standard Deviation)
 $e =$ Level of Precision = 0.80(99% probability)
 $n =$ Sample size
 $n =$ 500

Thus the sample size determined was 413. However, to increase the reliability of data sample size is increased to 500.

Period of Study: The data and information collected from respondents pertains to the year 2013-2014
VALIDITY AND RELIABILITY.

Validity of the instrument is ensured after extensive literature study and discussion with managers and research supervisor and experts from Industry. Reliability is measured with help of Cronbach's alpha statistic. In the present research, multi item scales are checked for reliability analysis with the help of SPSS Version 20. The Cronbach's alpha values range from

.80 to.85 for different segments of research instrument indicating that the data is suitable for confirmatory purpose [41-50].

Sources of Data: The secondary sources of data consist of books, journals, periodicals, electronic papers and websites. The primary data sources consist of eliciting responses from store managers and consumers of men's apparel. Field survey was conducted across six different retails outlets in the city of Chennai. The respondents were approached at the exit as it is likely to capture the recent experience. A total of 650 questionnaires were collected and 500 were found to have complete data as per requirements.

Data Analysis and Interpretation

Factor Analysis of Consumers' Perception: In order to study the consumers' perception about private brand, the factor analysis has been used. The principal component method of factor analysis was carried out with Eigen values greater than one through varimax rotation and the results obtained through rotated component matrix are presented.

Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy indicate a value of 0.756 pointing that factor analysis is an appropriate tool. All variables exhibit commonality of greater than 0.50 with Cronbach's alpha is equal to 0.83 indicating strong reliability of the instrument [51-70].

Reliability: The consumers' perception was measured using a five point scale and the reliability coefficient is presented.

The Cronbach's alpha of the scale was 0.83 indicating that each measure demonstrated acceptable internal consistency.

From the table, it is inferred that out of 20 perception variables, three variables have their high, relatively tightly grouped factors.

Construct-I:

- When I wear private brand apparel it is attracted by the opposite gender (0.65).
- Availability of all accessories satisfies my dressing needs (0.70).
- Discounted private brand apparels are of low quality (0.66).

Hence this construct is named appropriately "Attracting the opposite gender and choice of appropriate accessories". This factor may be considered as most important construct.

Construct-II:

This construct consist of

- The price at which I purchase private brand apparel is right for me (0.72).
- The private brand apparel is suitable for my personality (0.76).

Hence this construct may be named as Value for money and personality. This may be interpreted as a source of Sanskritization (Charsley, S 1998). Sanskritization is a particular form of social change that denotes the process by which lower castes in caste hierarchy emulate ritual and practices of upper caste.

In the similar sense, in the case of men's private brand approach the respondents within the salary group of Rs.3 Lakhs to Rs.5 Lakhs would like to emulate the higher income groups, with apparels that are similar albeit lower prices.

Construct-III:

This construct consist of:

- Private brand apparels provide a sense of professionalism (0.66).
- Ambience within the private brand apparel outlet is appealing (0.76).

Hence the third construct is named appropriately as "Enhanced professional image".

Construct-IV:

This construct consist of:

- Latest designs are available in apparels I purchase (0.57).
- Whenever I wear private brand apparel, everybody appreciate my dressing sense (0.63).
- I prefer price off's when I buy a private brand apparel (0.60).

Hence the construct is named as "Enhanced dressing sense with appropriate design".

Construct-V:

The construct includes:

- Whenever I wear private brand apparel I feel confident (0.73).
- I can express myself easily when I wear private brand apparel (0.55).
- The store from while I buy private brand apparels is conveniently located (0.72).

Hence the construct is named as "Confidence with ease of self-expression".

Construct-VI:

This construct includes:

- The quality of the private brand apparel is highest (0.64).
- When I wear private brand apparel I can express myself well (0.74).

Hence the construct is a named as "Image of quality and self-expression".

Construct-VII:

This construct consists of:

- The size suits me correctly (0.79).

Hence this construct is name as "Appropriate fit".

Construct-VIII:

This construct consists of:

- The apparel enhances my image (0.65).
- I prefer a private brand apparel outlet if it offers "Buy one take one free" (0.51).

Hence this construct is name as "Image builder"

Table 2 influences of perceptual factors on purchase value of consumers-multiple regression analysis.

In order to assess the effect of perceptual factors on purchase value of consumers, the multiple linear regressions by Ordinary Least Square (OLS) was estimated and the results are presented. The results indicate that the coefficient of multiple determinations (R²) is 0.68 indicating the regression model is moderately fit.

The results show that promotion and distinctiveness are positively influencing the purchase value at five per cent level of significance while value is positively influencing the purchase value of the consumers at one per cent level of significance [71-81].

Table1: Cronbach's Alpha Reliability Coefficient

Variables	No. of Items	Cronbach's Alpha
Consumers' Perception	20	0.83

Source: Primary & Computed Data

Table 2: The eight constructs are named appropriately

FACTOR ANALYSIS OF CONSUMERS' PERCEPTION

	Rotated Factor Loadings on							
	I	II	III	IV	V	VI	VII	VIII
Consumers' Perception								
The price at which I purchase a private brand apparel is right for me		0.724						
The private brand apparel is suitable for my personality		0.761						
The quality of the private brand apparel is highest						0.639		
The color range of apparels has widest range								
Latest Designs are available in apparels that I purchase				0.568				
The size suits me correctly							0.794	
The apparel enhances my Image								0.646
Whenever I wear a private brand apparel everybody appreciates my Dressing Sense				0.627				
Whenever I wear a private brand apparel it attracts the opposite gender	0.646							
When I wear a private brand apparel I can express myself well						0.738		
When I wear a private brand I feel Confident					0.732			
I can express myself easily when i wear a private brand apparel					0.55			
Private brand apparels provide me a sense of Professionalism			0.662					
The store from which I purchase a private brand apparel is conveniently located					0.717			
Ambience within the private brand apparel outlet is appealing			0.761					
Overall Customer Service of the private brand outlet is excellent								
I prefer Price Offs when I buy a private brand apparel				0.601				
I Prefer private brand apparel outlet if it offers buy one take one free								0.514
Availability all accessories satisfies my dressing needs	0.696							
Discounted private brand apparels are of low quality	0.658							
Eigen Value	2.24	1.85	1.5	1.48	1.24	1.18	1.14	1.11
% of Variance	8.61	8.06	7.72	7.31	7.27	7.12	6.31	6.21
Cumulative % of Variance	8.61	16.67	24.39	31.7	38.97	46.09	52.4	58.61

Extraction Method: Principal Component Analysis.

Rotation Method: Varimax with Kaiser Normalization.

Rotation converged in 16 iterations.

Source: Primary & Computed Data

Table 3: Multiple Regression on Purchase Value of Consumers

Perceptual Factors	Regression Coefficients	t-value	Sig
Intercept	2.058**	61.014	0.001
Attracting the opposite gender and choice of appropriate accessories	.062*	2.148	0.012
Value for money and personality	.007**	4.206	0.001
Enhanced professional image	-0.051	-1.503	0.134
Enhance dressing sense with appropriate design	.075*	2.207	0.028
Confidence with ease of self-expression	-0.016	-0.479	0.632
Image of Quality and self-expression	0.016	0.481	0.631
Appropriate fit	0.048	1.414	0.158
Image builder	-0.072	-2.133	0.033
R2	0.68		
Adjusted R2	0.56		
F	2.199		0.026
N	500		

Note: ** Significance at one per cent level

* Significance at five per cent level

Source: Primary & Computed Data

Inference: Eight constructs that are identified by factor analysis are related to purchase value of respondents and subjected to multiple linear regressions by ordinary least square estimation and results are presented.

The result indicates that the co-efficient of multiple determinants (R²) is 0.68 indicating that regression model is moderately fit.

Value for money to suit the respondents personality, enhanced image of dressing sense with appropriate design and attracting the opposite gender and choice of appropriate accessories are the most sought after constructs that influences purchase value of respondents.

Recommendations and Suggestions: Price centric customer as indicated by factor analysis (with highest score of 0.72) may be appealed through Every Day Low Price as customer is not likely to go for cherry picking and frequenting the retail outlet. Since majority is working in organizations (66.80%), organization wise promotion may be undertaken with organization centred discount offer. This particular kind of promotional strategy is adopted by consumer durable manufacturers in India. As the in house tailors are used to make alterations, the data based with respect to different age groups representing 21-35 years constituting 82.35% may be collected. The data may be used for creating Indian sizes which may be customized. The colour preferences are to be studied with respect to these groups.

CONCLUSION

Present research addressed issues of finding demographic profile of consumers of private brands in men's apparel; positioning of private brands with respect to different attributes; and discerning the relationship between perception, expectation and satisfaction. The demographic profile of the consumer is in the age group of twenty one to thirty; educated with graduation; predominantly employed in private sector or professional; and annual income of rupees three lakhs to five lakhs; requiring formalwear for work place. Status enhancement is one of the key determinants for purchase decision. The most important attributes preferred are price, value for money and discounts indicating that customer is price centric. He also prefers to have less uncertainty while making purchases.

The average revenue per customer or user (ARPU) is rupees 2,560 indicate strong incentive to private brand outlets to convert footfalls to sales. Wide range, variety and its display is likely to drive footfalls. Lighting, hygiene and appropriate planogram need to be planned

for customer to have better choice. Design, fit and colour preferences are important factors considered by consumers.

This study has led to a model with factors that influence brand loyalty of the customer. It is empirically found that there is no clear brand leader, with customer's preference fragmenting towards different attributes. The model obtained indicates that satisfaction need not necessarily lead to brand loyalty. The result appears to defy generally accepted principle. However, the reason can be explained as each of the brands are preferred with different attributes and the customer showed clear preference to shift to national brands.

Extensive studies spanning over ten years by Neale Martin, 2009, indicated that there is little correlation between customer satisfaction and customer loyalty. This is a counter intuitive observation to the popular belief that customer satisfaction leads to customer loyalty.

While Neale Martin, (2009) study is based on neuro biological aspects of brain science the present research confirms to his conclusions. However, the researcher in no way suggesting that customer satisfaction is not important. It is a necessary condition to build loyalty. Increasing customer habit formation and reinforcements through developing expectation and multiple in shop experiences is likely to increase brand loyalty for private brand men's apparel.

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