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Title

AN ANALYSIS ON CONSUMER'S ATTITUDE TOWARDS APPAREL PRIVATE LABEL BRANDS – A STUDY IN CHENNAI REGION

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Abstract:

The foray of private labels in apparel retail is very prominent making market to have the second highest percentage of organized retail. Apparel retailers have popularized their private labels which have attracted shoppers and thus have created keen interest in making purchase decision of these brands. The preference of consumer's keeps on changing with the set of characteristics or attributes that consumers consider important. Consumers then use these attributes in deciding which brands cater to their particular need.

Attitude is a scale, and brands move up, down and even off that scale with and without a vigilant brand management strategy. Pricing, promotional deals and product availability all have tremendous impact on the position of your brand in the consumer's attitude set. The brands potential can only be fulfilled by continually reinforcing its perceived quality, up market identity and relevance to the consumer. The same branding activities that drive awareness also drive preference. And, while awareness alone will not sustain attitude, it will improve the brand's potential for building and maintaining preference. This paper focus on how private label apparel brands are inducing customers in their purchase decision, factors that the customers look in for preferring private label apparels, consumer loyalty and shopping behavior and thereby add to retail brand equity.

KEY WORDS: Private Labels, Perceived Quality, Attitude**,** Shopping Behavior and Loyalty.

Introduction to Indian Apparel Industry:

The Indian apparel industry has a vast existence in the economic life of the country. It plays a critical role in the economic development of the country with its contribution to industrial output, export earnings of the country and the generation of employment. The Indian apparel industry has seen remarkable changes in the past few years and it is also one of the India's largest foreign exchange earners. Embroidery being the traditional art form of the country has contributed hugely for apparel industry. Indian embroidery market stands out as being extraordinary in the international markets.

Today the textile and apparel sectors employ 35.0 million people (and is the 2nd largest employer), generates 1/5th of the total export earnings and contributes 4 Per cent to the GDP thereby making it the largest industrial sector of the country. This textile economy is worth US $ 37 billion and its share of the global market is about 5.90 percent. The sector aspires to grow its revenue to US $ 85 billion, its export value to US $ 50 billion and employment to 12 million by the year 2012 (Texmin 2005).

According to the 8th Annual Global Retail Development Index (GRDI) of AT Kearney, India retail industry is the most promising emerging market for investment. In 2007, the retail trade in India had a share of 8-10% in the GDP (Gross Domestic Product) of the country. In 2009, it rose to 12%. It is also expected to reach 22% by 2010. According to a report by Northbride Capita, the India retail industry is expected to grow to US$ 700 billion by 2010. By the same time, the organized sector will be 20% of the total market share. It can be mentioned here that, the share of organized sector in 2007 was 7.5% of the total retail market.

According to a new study by techopark most developed countries will see continuous decline in their textile and apparel industry and create fresh opportunity of US $ 140 billion for exports for developing countries by 2020. In addition, an opportunity of approximate US $ 360 -370 billion likely to be created due to raise in demand. Hence an additional market opportunity of US $ 500 billion is likely to be created by 2020.

In order to be successful, retailers must think strategic/ think scale (Merger/ acquire or divest), attract the best management and operational talent and rebrand the entire industry, companies and products.

Private Label Brands:

Private labels are generally launched to gain higher gross margins from branded products. They differentiate the retailer's own product from the branded ones and aims to gain and sustain consumer loyalty. They provide a competitive benefit to the retailer over branded players. It also offers a platform for the retailers to negotiate with branded players.

Some retailers combine private label clothing with national brands. They create their own brands and sell them in their outlets along with other national brands at a 40% cheaper price. Stores like Sears and JCPenney opt to combine 50% of their apparels with 50% of national brands like Adidas, Sag Harbor etc. This way, sourcing and cost advantages are passed on to the consumers. Retailers who sell their own private label apparels have appropriate control over product development. The apparels are created by an internal design team. Through adequate market research they are able to customize their outfits to target specific groups of consumers.

According to Senior Consultant (Retail Practice) at TechSci Research, "the inclusion of private label across multiple product offering enables the retailers to improve its margins without any huge investment on marketing and advertising activities. Besides this, the private label also enables retailers to generate consumer loyalty towards the in-house brand by ensuring long-term consumer retention for their retail chain".

Consumer acceptance towards private labels has been positive. As per the research study "Private Label & Indian Consumer Insight 2010" findings, almost 85% of surveyed consumers have shown their willingness to repurchase the private label promoted by the respective retailer. The consumption of private label has helped Indian consumers bring down their monthly consumption bill by 8%-10% depending upon the product category.

The majority of retailers in India have introduced their own private labels driven by increasing consumer acceptance and associated economic benefits. Retailers like Spencer's, Future Group, Reliance Retail and Bharti Wal-Mart have been working continuously to create a spectrum of private brands in order to restructure their product portfolio in coming years. This new development may be seen as a new strategic move to have an operational edge over competition, as well as to retain their customer base.

THEORETICAL FRAMEWORK:

Meaning of Private Label Brands:

Store brands or private label brands are brands owned, controlled, and sold exclusively by a retailer (Baltas, 1997). Private label brands which were first introduced over 100 years ago in few product categories, had seen an impressive growth in past few decades (Tarzijan, 2004). Private labels proliferated in a number of product categories and garnered major market share as retailers perceived numerous benefits by their introduction. Apart from providing higher retail margins in comparison to national brands (Ashley, 1998), private labels added diversity to the product line in a retail category (Raju et al. 1995). Added benefits accrued to the retailer in terms of differentiating its offerings from competing retailers as well as having greater leverage with manufacturers of national brands.

Evolution of Private label brands:

As observed globally, a critical area of interest to retailers is the consumer attitudes towards store brands and its relationship with customer satisfaction and store loyalty. Store brands or Private

Labels-or simply-are defined as the "products owned and branded by the organizations whose primary objective is distribution rather than production" (Schutte, 1969). Private labels can also be defined as "any products over which a retailer [has] exercised total sourcing and market control" (Mintel, 2005a, b). According to the Private Label Manufacturers' Association (PLMA), "[Private label] products encompass all merchandise sold under a retailer's brand. That brand can be the retailer's own name or a name created exclusively by that retailer. In some cases, a retailer may belong to a wholesale group that owns the brands that are available only to the members of the group.'' This suggests two things. First, it is the retailer who owns and controls the brand, whereas this was traditionally the role of the producer. Second, the retailer has exclusive rights over the product. This means that different retailers do not sell identical PLBs, which is not the case when retailers sell name-brands. Thus, the development of PLBs does not only alter the relationship between producers and retailers, but also affects competition between retailers because PLBs become an additional way of differentiating between retailers (Berges-Sennou, Bontems, and Requillart 2004).

Benefits of Private label brands:

The two main advantages derived from the adoption of PLs by retailers are: bigger margins, and increased store loyalty (Fontanels 1996).The super and hyper markets have come up with their own private labels now, like private labels from the food bazaar, Mélange from lifestyle, More foods, Reliance apparel etc. These labels incur lesser cost of marketing and distribution hence cost less to the consumers – and of course there is no shelf cost. They retail at around 15-20% lower than main stream brands. The aim of these labels is presence on the shelf within the supermarkets more than a price label. The quality is on par with other international labels. People love to pick these labels due to ready availability, and often also a very generic brand "trust". This could be new strategy for brand building and tasting, as this way the market (consumer) is already aware of the label and may have a developed liking for it.

Today these labels are competing with the international branded labels like those from Nestle, Hindustan Unilever, P&G etc. this year these private labels have captured a market share of 5.7 % which can be considered as quite significant, as they are taking share from established national and international labels. Awareness of such brands is increasing too: Every 4 out of 5 supermarket shoppers know about these labels. The labels could be tomorrow's successful brands…

Previous studies related to Private label Brands:

The success of the private label ultimately depends on the consumers mind set whether he is ready to pay for the private label apparel or not. It depends on the kind of sales and margin level the retailer can drive in the business. There was a time when private label clothing was considered to be a choice of buying only during recessions. In the past private labels targeted the lower income people. But, today private labels are fully accepted, and even wealthy shoppers go in for buying them. Buying private label apparels is in trend currently, and is considered as Smart Shopping. Two out of every three shopper in the world believe that supermarket owned private labels are as good as the other brands.

Like many other items, apparel products are composed of many physical characteristics, which are perceived differently by various consumers. When considering a product purchase, consumers tend to compare and contrast alternative products made up of different attribute combinations. Their preferences for items of apparel may depend on the joint influence of price and product attributes such as quality, style, and brand. According to Lang and Crown (1993), past research mostly used survey methods to directly measure consumers' attitudes towards products and their attributes. The possibility of interaction effects between attributes is usually overlooked.

Over the years researchers of marketing have taken a keen interest in consumer perceptions of value (Zeithaml, 1988; Sheth et al, 1991; Woodruff, 1997 in Sheth and Sosodia, 1999). Many aspects, such as price, aesthetics and quality are important considerations when buying decisions for clothing items are made (Eckman et al, 1990; Lang & Crown, 1993). Criteria that have been found to influence the evaluation and buying decision of apparel include price, care requirements, brand, product composition (i.e. style and color), store image, and advertising image. These authors have classified the criteria as either intrinsic or extrinsic. Intrinsic cues are product attributes that cannot be changed or manipulated without also changing the physical characteristics of the product itself. Product attributes that are not component parts of the physical product but that are applied by the manufacturer or retailer are extrinsic cues. According to Eckman et al (1990), price and brand are the attributes most frequently used by consumers in assessing apparel. When all the studies cited are considered as a whole, intrinsic characteristics seem to be more important to consumers than extrinsic characteristics. This pattern is consistent with research that has specifically examined the extrinsic/ intrinsic issue (Hatch & Roberts; Syzbillo & Jacoby; Wheatley et al in Eckman et al, 1990). Beaudoin et al (2000) identified 12 attributes that correlated with attitudes when purchasing apparel, namely: good fit, durability, ease of care, favorable price, comfort, quality, color, attractiveness, fashionableness, brand name, appropriateness for occasion, and choice of styles. Dickerson (in Beaudoin et al,2000) investigated the relative importance that consumers attach to five garment attributes when making purchasing decisions, namely: price, care, country of origin, quality, and style. Shim and Kotsiopulos (1993) researched the apparel shopping orientation of consumers on the basis of nine factor labels, namely: appearance/fashion conscious, brand conscious, convenience/ time-conscious, shopping mall-oriented, local store-oriented, apathetic toward “Made in the USA”, catalogue-oriented, economy/price conscious, and credit-oriented.

What is lacking throughout this research is any attempt to understand how multiple criteria, both intrinsic and extrinsic, are combined in the purchasing decision- making process (Eckman et al, 1990:14). In this study the combined influence of the following intrinsic and extrinsic attributes will be examined: brand, quality, service offered by the retail store and price.

Objectives of the present study:

The present study has been undertaken to understand attitude of Indian consumers towards PLBs in Indian Retail and the importance they attach to such attributes while making purchases. This paper aims to uncover current attitude towards PLBs in the Indian Retail apparel sector. Further more it aims to shed light on the effect that brand, quality, service offered by the retail store and price, have on shopping behavior with effect to purchasing apparel based PLBs.

In particular the research focuses on:

- Finding out customer attitude towards PLBS apparels.
- To analyze significant difference across gender and services offered by retail stores.
- To analyze the significant difference across gender and price attribute during decision making.
- Finding out the influence of advertisements in purchase of PLBs.
- Finding out the reasons for purchase of PLB apparels.

Methodology:

The research is of exploratory nature, based on the primary data but secondary data has also been collected from various sources as per the requirement. For collection of primary data, an exclusive survey was conducted among 150 consumers of top retail chains in apparel segment in Chennai of Tamilnadu state. To obtain information structured questionnaire was formulated.

A non-probability, convenience sampling technique was used to administer a consumer survey. Although predefined quotas were not strictly set, the sample obtained was somewhat representative of customers of apparels retail outlets. Three hundred questionnaires were deployed using the self administered, mall intercept method of local shopping retail apparel centers in Chennai. This approach was adopted to facilitate expedient questionnaire completion. A preliminary check was done in the field, to identify and remedy any inconsistencies, omissions or obvious mistakes with the questionnaire.

The data of self administered questionnaire was the captured, cleaned, coded and analyzed. Finally the data was tested for normality and this was confirmed to be in order.

Empirical Findings:

Composition of sample:

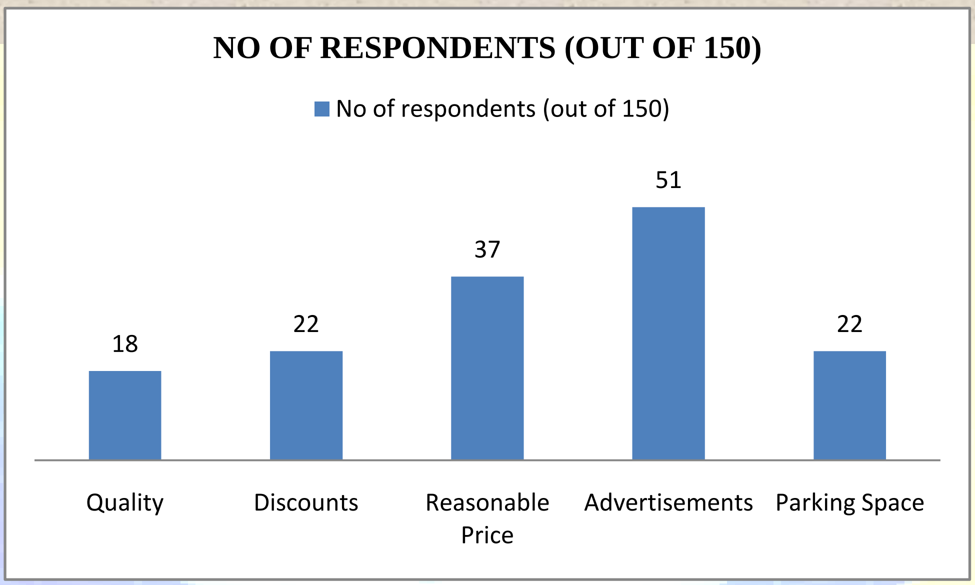
The sample is deemed to be representative of the urban retail apparel stores in India. In terms of gender, slightly more males (56.7%) completed the questionnaire than females (43.3%). The majority of the sample falls into 21 to 30 year old age category, reflecting 46% of respondents. The 31 to 40 year old age category reflects 32.7% of respondents, 41 to 50 year old category, reflect 12% of respondents. Below 20 and above 50 represent with approximately 5.3% and 4% each. Thus relatively broad spread of age categories is achieved. However the representation is skewed towards younger age group segments. Over more than half of the sample is currently married, whilst approximately 31.3% are unmarried.

The largest portion of employment represented in the sample is 76% are employed or working with about 24% doing business and 42% as working class. A mere 34% of sample is not actively working and can be classified further as 12.7% are students and 21.3% are housewives.

However, it is acknowledged, that the sample is slightly biased towards income earners as they fall in to the urban category.

Consumer attitudes to private labels may be more useful than segmentation studies as a basis for identifying market segments (Myers, 1967).Consumer perceptions and attitudes to private labels are based in large part on perceptions of the quality, price and value of private labels relative to that of national brands. This is depicted in Figure 1. It is clear that advertisements which is a form of extrinsic cues plays significant role in enabling consumers to make decision in purchase of apparels,(51%) of respondents are influenced to purchase apparels based on the information provided in the advertisements and awareness created by advertisement with regard to current trends in apparels, the analysis reveal that (37%) consumers perceive price of the apparel should be reasonable which reveals that they look in for value for money and this is based on previous analysis made by(Cravens et al and Monroe in Sweeney & Soutar, 2001) on price attribute, discounts which is form of promotional tool influences purchase decision, (22%) of respondents look for more promotions by way of offers, discounts and free gifts and customer convenience like parking facility influences in deciding from which store to purchase and (22%) of respondents feel that shopping place should provide them with all convenience.

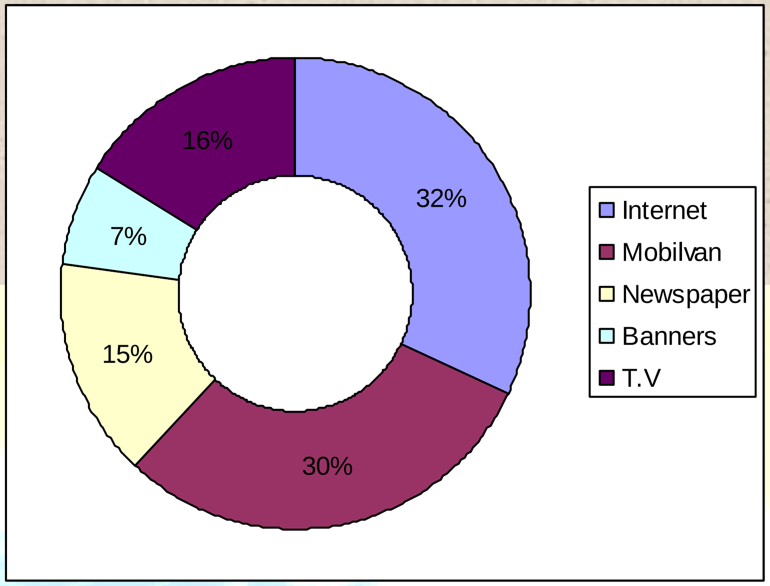
Figure 1 Reason of Purchasing PLB Apparels



Advertisements as an influencer towards purchase attitude of PLB apparels:

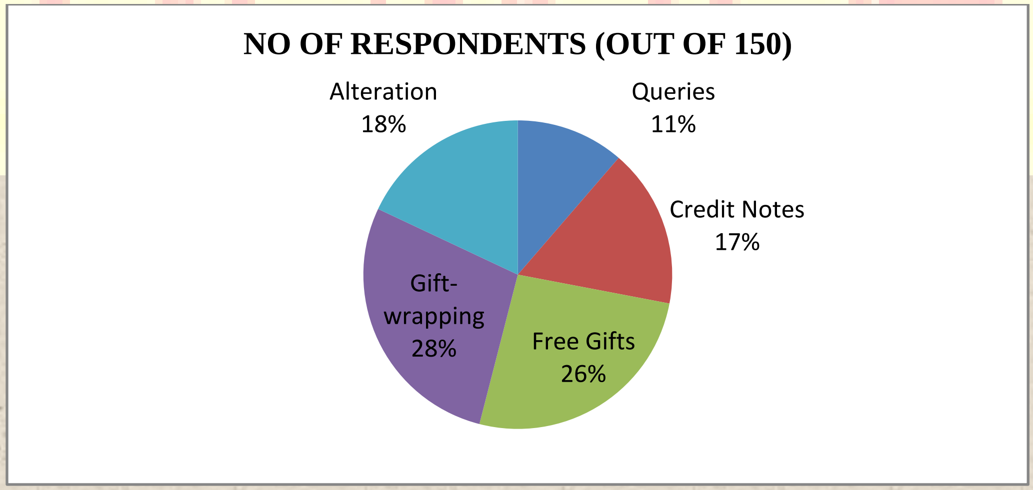
Advertisements play vital role in making a business sustain in the competitive environment and different media of advertisements have varying impact on the growth of business. The frequency of advertisements, the target audience chosen for advertisement and the media that is used to convey message depends on the effectiveness of advertisement. An analysis has been made on different modes used in advertising for promoting sales. Among the various modes used for advertising internet plays effective role in advertising, (32%) of respondents are aware of apparels through internet as it has fastest reach, (30%) of respondents feel T.V as best mode of advertisement, Mobile van used recently have effective say in advertising in rural and remote areas, (16%) of respondents are aware of advertisement made by mobile vans. Banners and Newspapers create awareness among 22% of respondents.

Figure 2 Modes of Advertisement



In today's marketing world customers service desk play a vital role in offering the customer desired service and try to please customers by offering excellent service at right time and this in turn creates positive attitude towards stores and make the customers to consider the visit to same shop again when they plan for their shopping, here the researcher has done frequency analysis to find how and what are the areas in which customer service desks offer their service and what do customers actually expect from the service desk.

Figure 3: Service offered at customer service desk



From the analysis it can be found that (28%) of respondents purchase private label apparels as token of gifts to their near and dear ones and 26% of respondents make their purchase decision based on free gifts that they get while making purchase of certain items and above certain values, (18%) of respondents approach customer service desk for alterations and (17%) for making credit notes and (11%) approach for clarifying their queries.

Table 1: Result of MANN-WHITNEY U Tests for Differences

In GENDER across PRICE

Ranks

	GENDER	N	MEAN RANK	SUM OF RANKS
PRICE	Male	85	62.71	5330.50
	Female	65	92.22	5994.50
	Total	150		

Test Statistics[a]

	PRICE
Mann-Whitney U	1675.500
Z	-4.378
Asymptotic Significance (2-tailed)	.000

Table 2: Results of MANN-WHITNEY U Tests for DIFFERENCES

IN GENDER across QUALITY

Ranks

	GENDER	N	MEAN RANK	SUM OF RANKS
Quality	Male	85	72.29	6144.50
	Female	65	79.70	5180.50
	Total	**150**		

Test Statistics[a]

	QUALITY
Mann-Whitney U	2489.500
Z	-1.101
Asymptotic Significance (2-tailed)	.271

Table 3: Results of MANN - WHITNEY U TESTS FOR DIFFERENCES

IN GENDER Across SERVICES

	GENDER	N	MEAN RANK	SUM OF RANKS
Service	Male	85	78.25	6651.50
	Female	65	71.90	4673.50

Table 3: Results of MANN - WHITNEY U TESTS FOR DIFFERENCES IN GENDER Across SERVICES

	GENDER	N	MEAN RANK	SUM OF RANKS
Service	Male	85	78.25	6651.50
	Female	65	71.90	4673.50
	Total	150		

Test Statistics

	SERVICE
Mann-Whitney U	2528.500
Z	-.942
Asymptotic Significance (2-tailed)	.346

The non-parametric Mann-Whitney U test was used to test significant differences in attribute importance between the two expenditure groups. The Mann-Whitney U test is a non-parametric alternative to the independent samples t-test (Green et al, 1999:359).The findings in Table 1 indicate that respondents in the two gender groups show significant difference with respect to the price attribute of apparel when buying decisions are made. From the table 1 it can be observed that there is difference in mean rank of the gender and the price of the apparels in store.

From Table 2 it can be inferred that there is no difference in the mean rank across gender group and quality of PLBs, so it can be observed that both the gender groups have more consideration for quality of the apparels they buy.

From Table 3 it can be inferred that there is no significant difference in the mean rank across gender group and service offered by retail apparel outlets.

Major Findings:

- Based on the research conducted among the total sample size of 150 respondents majority (46%) of them belong to age group of 21-30 years are these are major consumers of Private Label Apparels.
- From the total sample of 150 respondents, when we analyze their educational qualification, 5% are professionals, 41% of the respondents are Post Graduate and 33% are Graduates who prefer private label apparels.
- The buying behavior of respondents reveals that 51.3% of respondents make weekly visit to stores dealing in apparels.
- The income group that mostly go in for purchase of private label apparels are respondents who have earning more than Rs.20,000/-
- Advertisements influence respondents to make purchase decision regarding where to make their shopping and 32% of respondents are aware about the recent style design, price and other promotions through internet and 30% of respondents have awareness through mobile van and remaining 38% through other modes like pamphlets, hoardings etc.
- On analysis of gender and price of apparels it was found that there is difference in the mean rank across gender and price attribute of apparels in the store.
- Quality of apparels plays important role in making purchase decision and when association between gender and quality of apparels were carried out under Mann-Whitney U TEST it was found that there is no significant difference in the mean rank between gender and quality of apparel.
- The chi square test conducted to analyze significant relationship between the Age and Store Image reveals

a. Consumers from different profession have their own views about the Price of the products

b. Store –image has a direct relation with the service provided by the store i.e., parking space, the way products are placed, assistance provided by the staff.

Research Limitations:

- Sample size of 150 consumers is too small in order to get more accurate and precise information, it should be more.
- Some of the respondents were not willing to respond freely due to time constraint and pressure
- It is not representation of all retail consumers in apparels segment
- It does not cover all aspects of PLB categories in apparels segment in India as it is a diverse segment.

Conclusion and Implications:

In this study, we examined how Indian consumers perceive PLBs in apparel segment in comparison to national label brands. The findings of the study can be useful to retailers in formulating strategies to make apparels other than the national brand an acceptable one in the market. An analysis of attitude with PLBs further more help retailers in developing stronger store/PLBs and in increasing their presence and acceptance in the market. The Indian apparel industry is growing with every passing day. There is stiff competition in the market among organized and unorganized retail apparels with both branded and unbranded apparels manufacturers for a share in the pie. The findings of the present study provide important insights to all the private manufacturers in India to increase their foothold and successfully compete in the Indian apparel market.

Trends in the apparel industry are changing rapidly and marketers are not always certain

How the market will accept the latest trend. A new trend can sometimes turn out to be no more than a fad – a very short lived trend and in that case retailers and manufacturers would lose money. Other trends turn out to be classics, where the demand grows and stabilizes. An understanding of buying behavior, and specifically of what consumer's value when apparel purchase decisions are made, can be of great value to marketers.

It can also be concluded that there is a no significant difference in the mean rank between gender and quality as well as between gender and service offered by the retail outlet. This will have implications for a manufacturer who is targeting a specific gender group. However, significant difference in the mean rank was found between gender and pricing strategy adopted by the retailers.

The analysis made in the study could help apparel manufacturers and retailers to:

♦ understand consumers' selection criteria when purchasing apparel

♦ plan their merchandise mix more efficiently

♦ plan their promotional messages and strategies better

♦ refine their training strategies for sales associates

This information could also be used for the development of a theoretical model towards understanding consumer apparel purchasing decisions. There is a definite lack in theoretical knowledge in the models that explain what is important to consumers concerning apparel purchase decisions, and specifically how they make trade-offs between various product attributes when purchasing decisions for apparel are made. Marketers may find it useful to investigate the possibility of using the attribute importance construct as a means of segmenting future markets.

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