



aski

aroscop

MARKET OUTLOOK AND  
SENTIMENTS TOWARDS  
**BUYING APPAREL** THIS  
FESTIVE SEASON

16<sup>th</sup> October 2021





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AROSCOPI SOLUTION SUITE

The logo for 'aski' is centered within a dark blue circle that has a yellow ring around its perimeter. The word 'aski' is written in a lowercase, sans-serif font. The letters 'a', 's', and 'k' are white, while the 'i' is a light blue color. The dot of the 'i' is a white circle.

aski

Aroscop **Ask1** is a Consumer Insights tool specifically designed to identify a micro cohort of users that have a certain behaviour and ask them questions using **specially designed interactive creatives**.

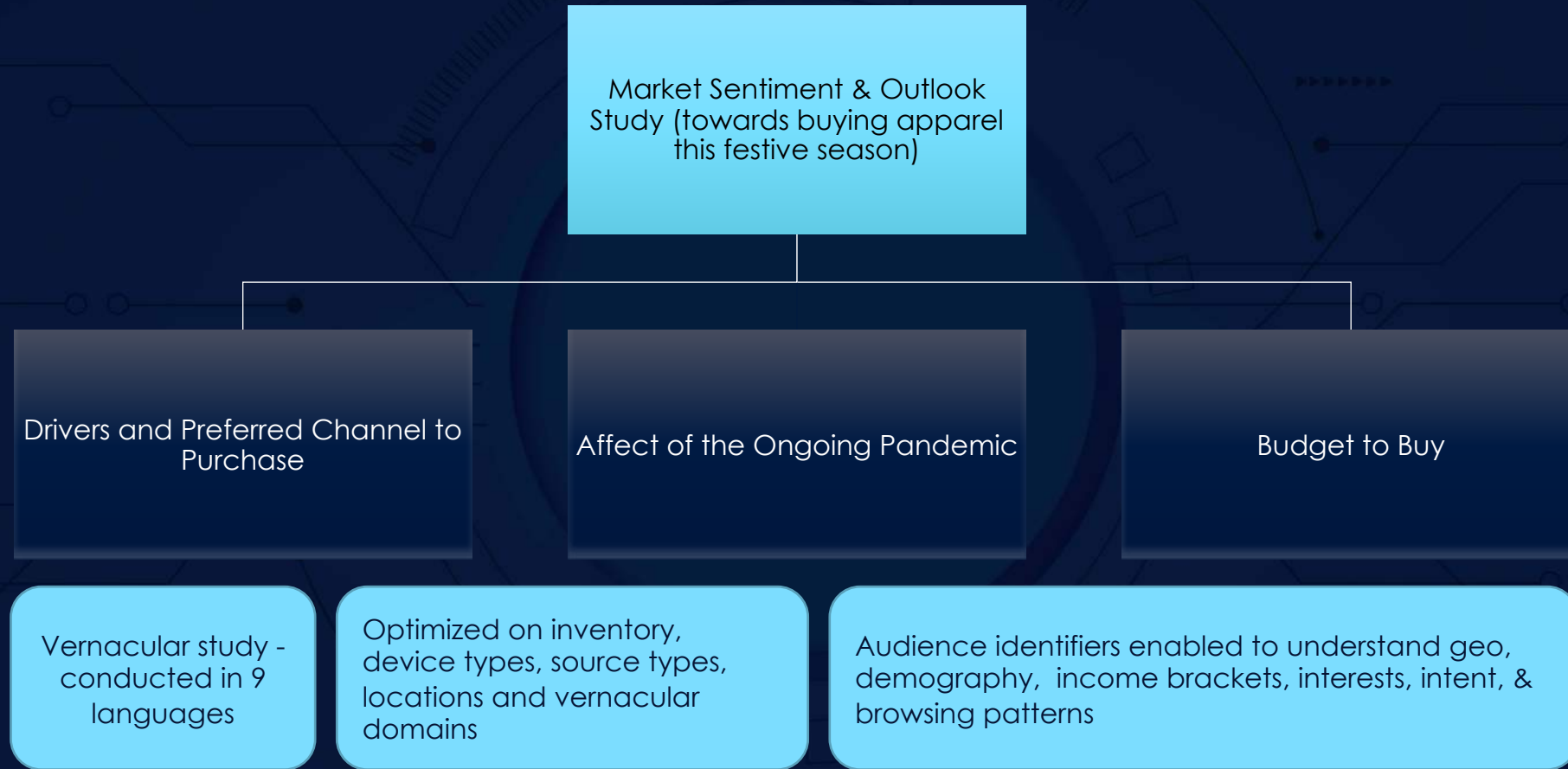
Backed by Aroscop's data science (DART), audience and contextual cohorts (COMPASS), and programmatic advertising platform (DSP), the solution aims to create highly relevant target or test groups, reach the right users at the right time (based on several signals), and programmatically deliver interactive display ads to generate credible responses.



## RESEARCH OBJECTIVE

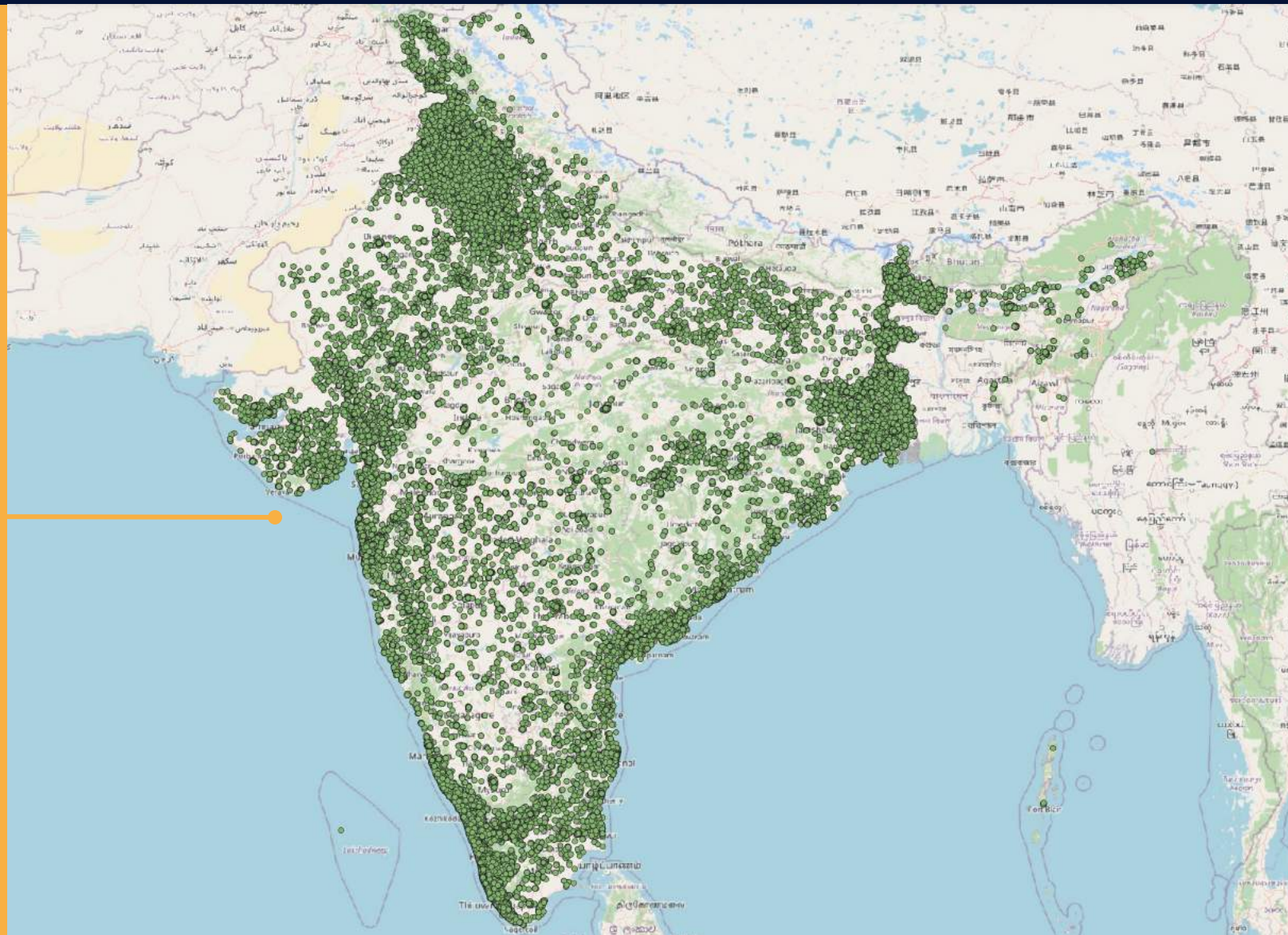
To understand the market sentiments, price sensitivity, preferred channel to buy and effect of COVID on purchasing apparel among audiences this festive season.

# RESEARCH SETUP

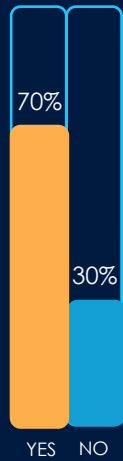




# THE STUDY COVERED THE LENGTH & BREADTH OF INDIA



# MARKET OUTLOOK TOWARDS APPAREL



70% of the respondents said that they are looking forward to buying apparel this festive season (Dussehra-Diwali)



63% of the respondents who are planning to purchase apparel this festive season said they will be shopping online



Apparel shopping is big during festivals. This year, more people said they will be buying apparel online due the accelerated digital adoption resulting from the ongoing pandemic and the subsequent lockdowns.

# KEY TAKEAWAYS & INSIGHTS

## —● Rs. 5,000

Most respondents say they will spend less than Rs 5,000 this season on apparel.

## —● ECOMMERCE

Will grow exponentially. 63% of those who are planning to buy apparel, say they will do it online.

## —● PANDEMIC

62% of the respondents say that COVID has moderately or severely impacted their decision or budget to buy apparel.

## —● DISCOUNTS

31% of the respondents cite discounts and low prices as their key motivator to buy apparel.

## —● RURAL INDIA

Looks for the best discounts and prices while buying online or offline.

## —● URBAN INDIA

Is driven by discounts while buying online. May spend more than their rural counterparts and will shop online.

## —● NORTH INDIA

May lead in eCommerce sales of apparel, and is driven by discounts, whether shopping online or offline.

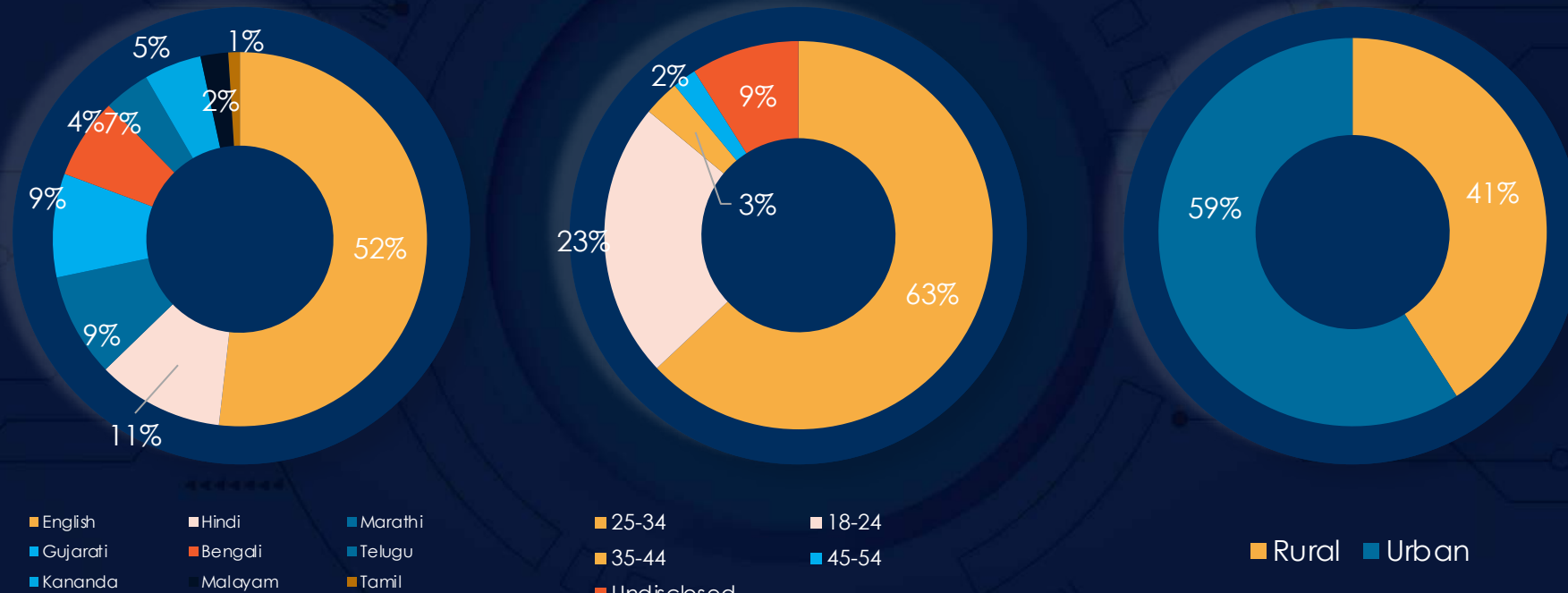
## —● SOUTH INDIA

Prefers easy return policies whether buying online or offline.



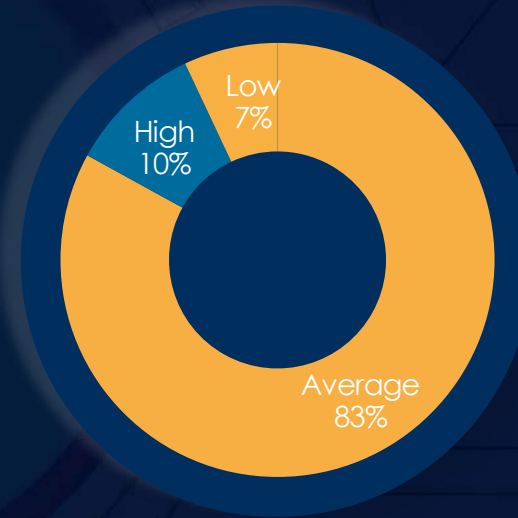
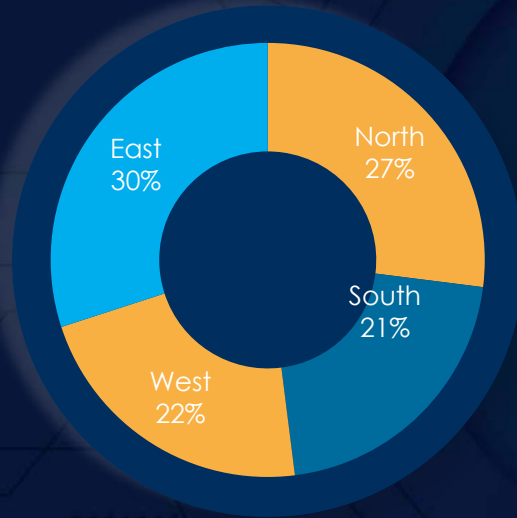
# SAMPLE & AUDIENCE SPLIT

The majority (86%) of respondents belonged to the age-group of 18-34 years. In terms of language of the survey questions, most (52%) of the responses came from English creatives while 48% came from vernacular creatives. Rural population made up 41% in the sample while 59% of the respondents came from urban areas.



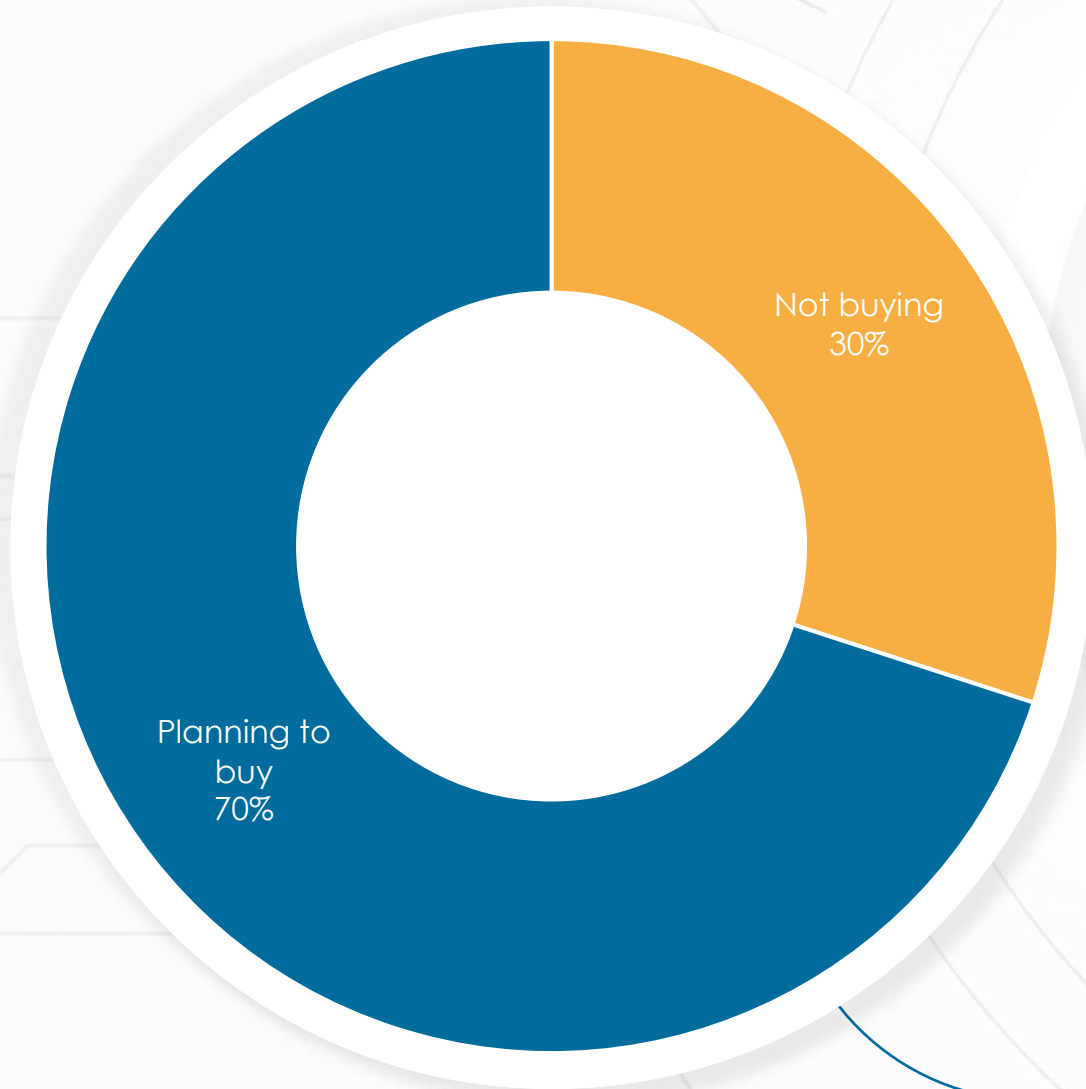
# SAMPLE & AUDIENCE SPLIT

All 4 regions (North, South, East, West) have near equal representation in the sample, with the eastern states contributing slightly higher than other regions. In terms of income category of the respondents, most belonged to the average income households.



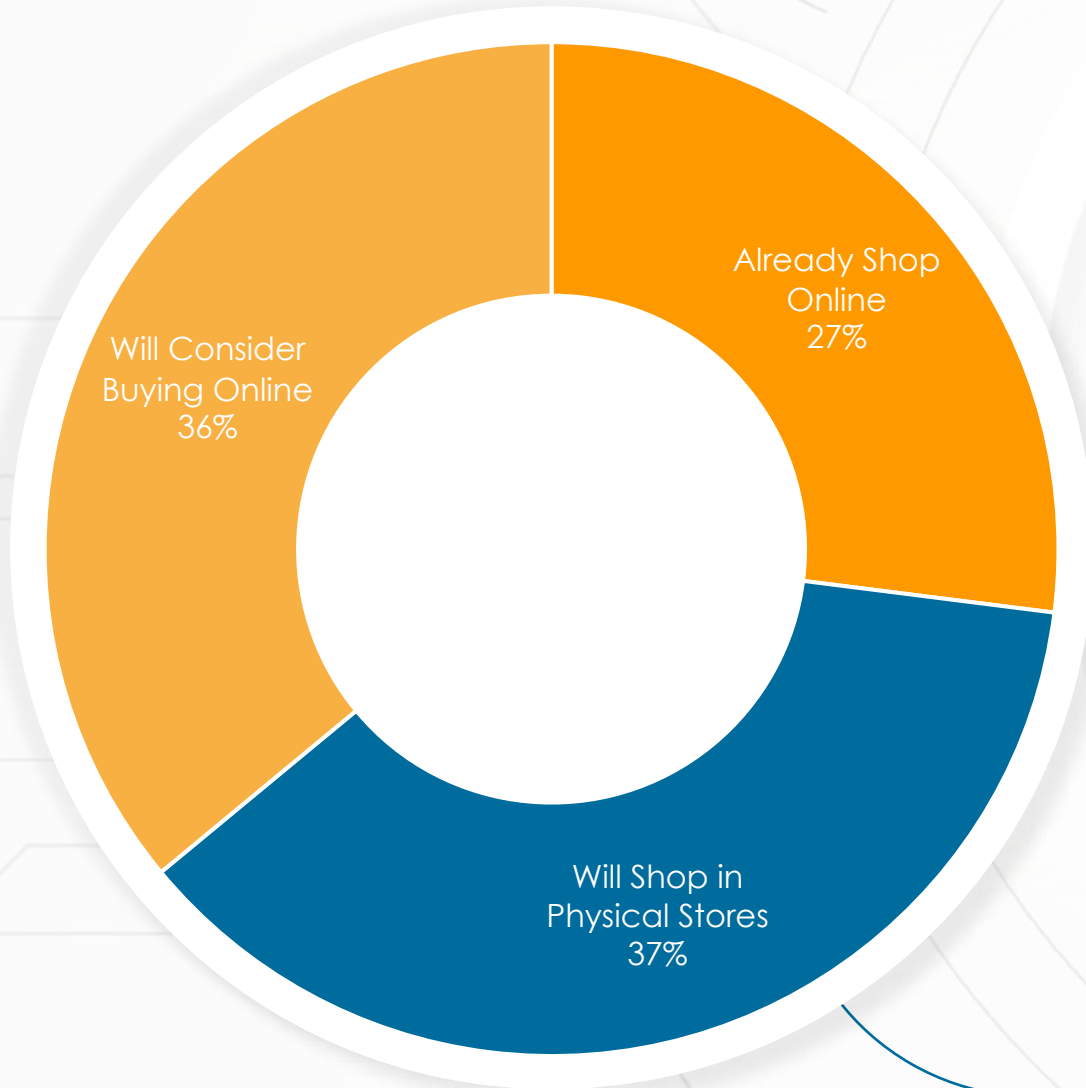


# RESEARCH FINDINGS



## FESTIVE SEASON WILL BOOST SALES

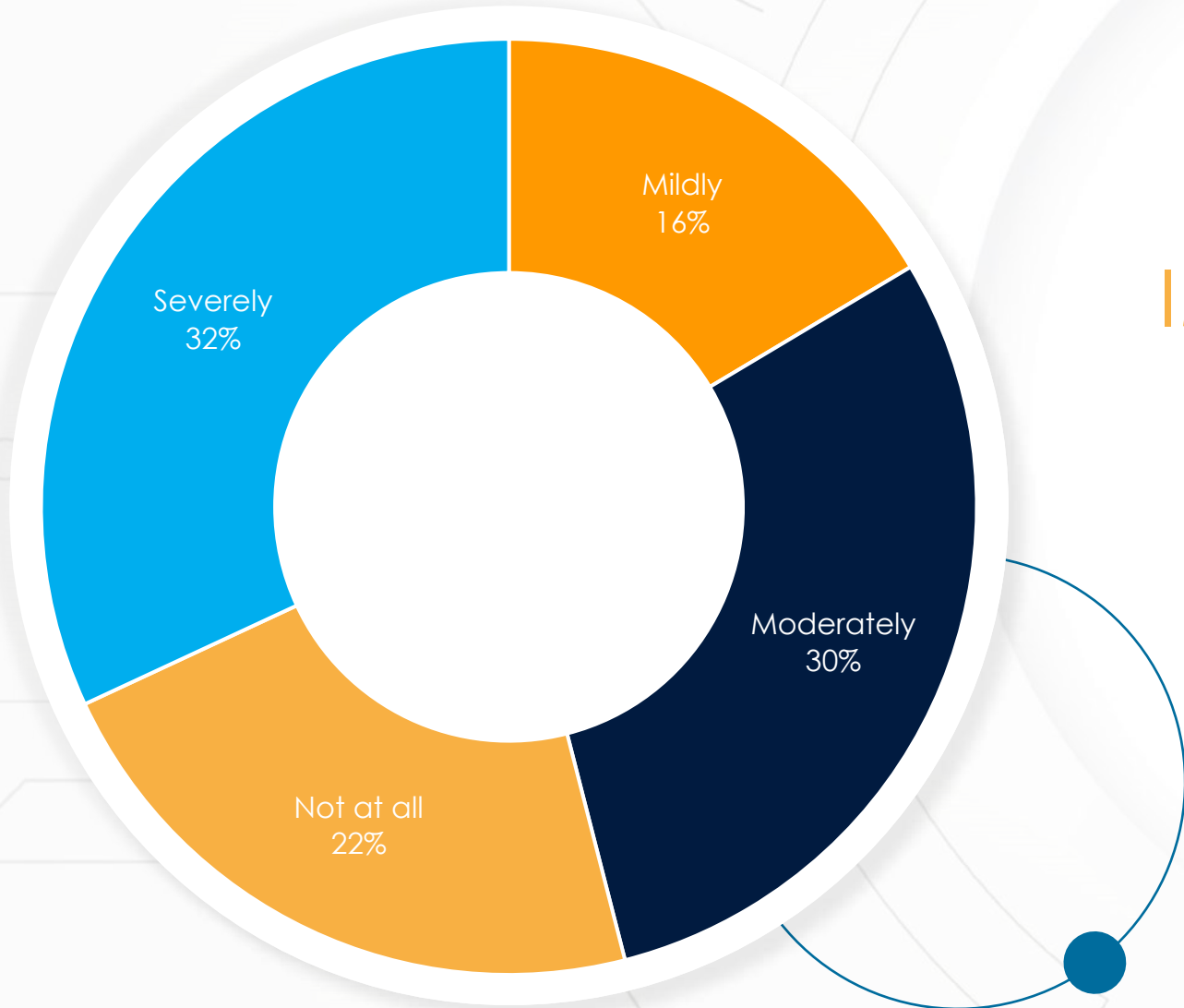
A MAJORITY OF RESPONDENTS WILL BE BUYING APPAREL (CLOTHES, SHOES, ACCESSORIES) THIS FESTIVE SEASON



## ONLINE ADOPTION HAS ACCELERATED

ON ASKED WILL THE RESPONDENTS BUY APPAREL ONLINE, GIVEN THE ONGOING PANDEMIC, 27% OF THEM SAY THEY ALREADY DO SO WHILE 36% SAY THEY WILL STILL BUY IN OFFLINE STORES.

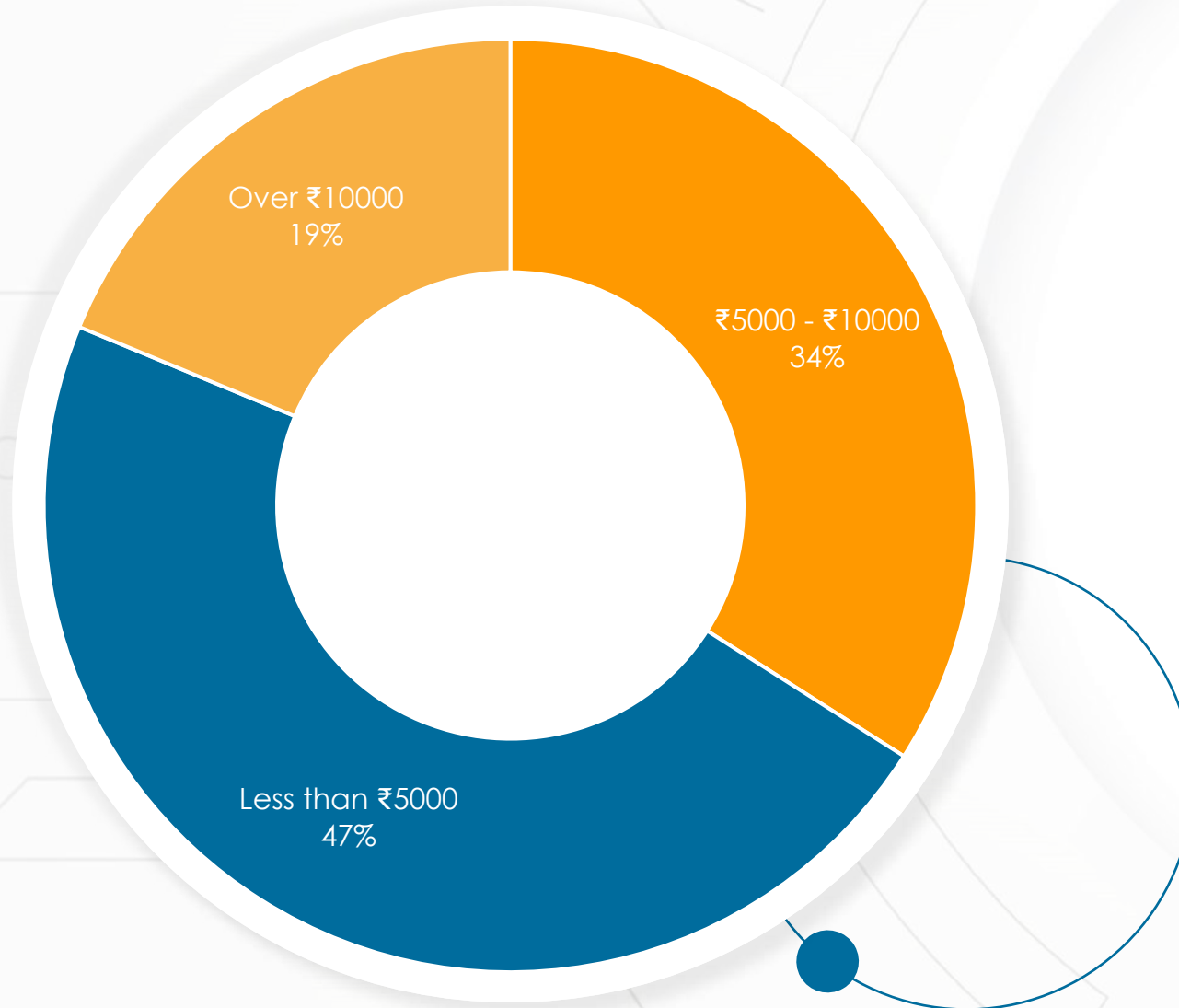
INTERESTINGLY, 37% SAID THIS FESTIVE SEASON THEY ARE CONSIDERING BUYING APPAREL ONLINE, EVEN THOUGH THEY WERE SHOPPING OFFLINE EARLIER.



## IMPACT OF COVID ON SPENDING

ONLY 22% OF THE RESPONDENTS BELIEVE THAT COVID HASN'T AFFECTED THEIR DECISION OR BUDGET TO PURCHASE APPAREL THIS SEASON.

62% SAID THAT THE PANDEMIC HAS MODERATE TO SEVERE IMPACT ON THEIR BUYING DECISIONS.

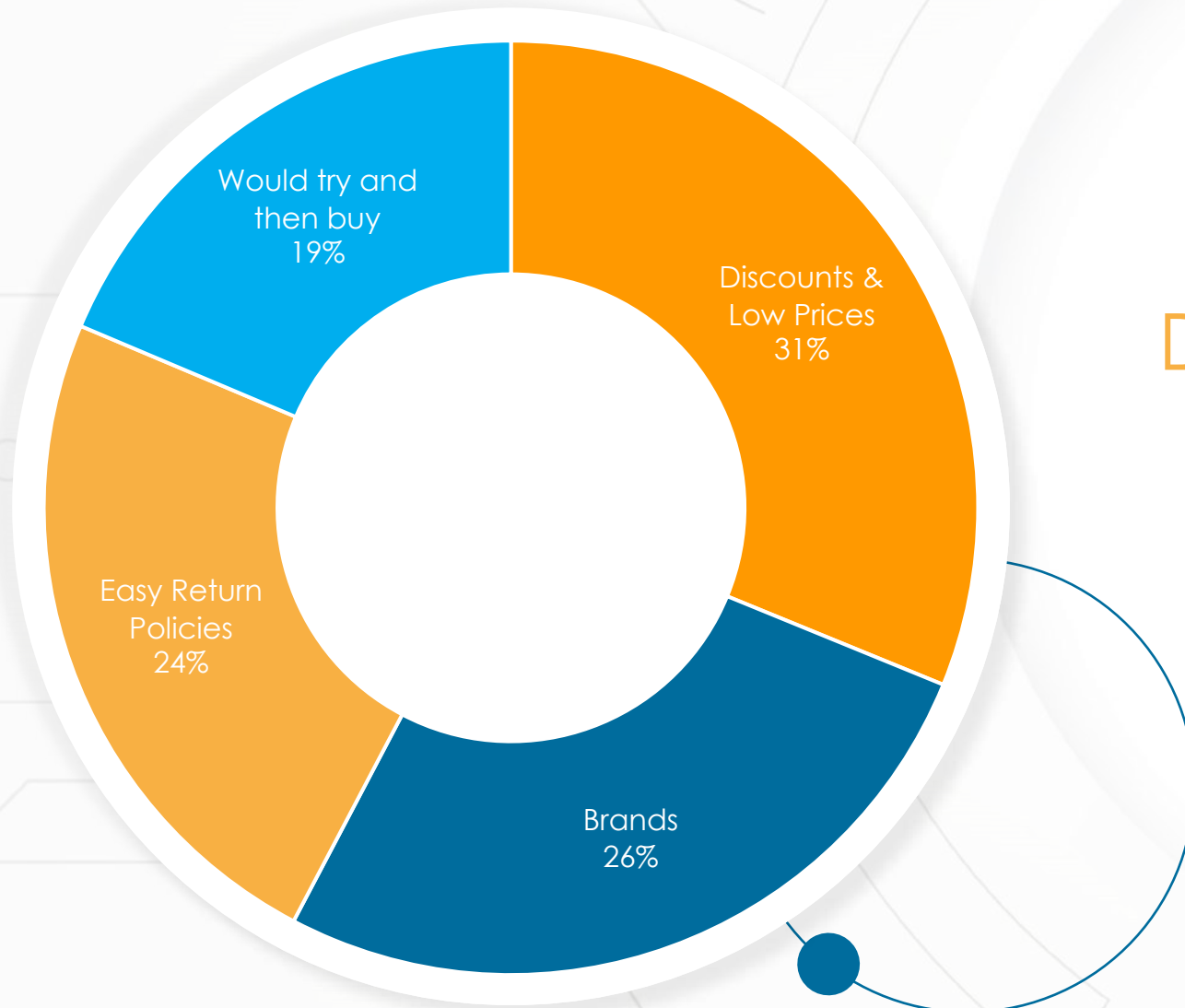


## BUDGET TO BUY

MOST (47%) RESPONDENTS WILL BE BUYING APPAREL FOR LESS THAN ₹5,000. 19% OF THE RESPONDENTS WILL BE SPENDING MORE THAN ₹10,000 THIS SEASON ON CLOTHES, SHOES, & ACCESSORIES.

# DRIVERS TO PURCHASE

DISCOUNTS & LOW PRICES (31%) IS WHAT THE RESPONDENTS CITE AS THEIR KEY CRITERIA IN DECIDING TO BUY APPAREL. BRANDS (26%) COME NEXT FOLLOWED BY EASY RETURNS (24%) AND ABILITY TO TRY BEFORE BUYING (19%)





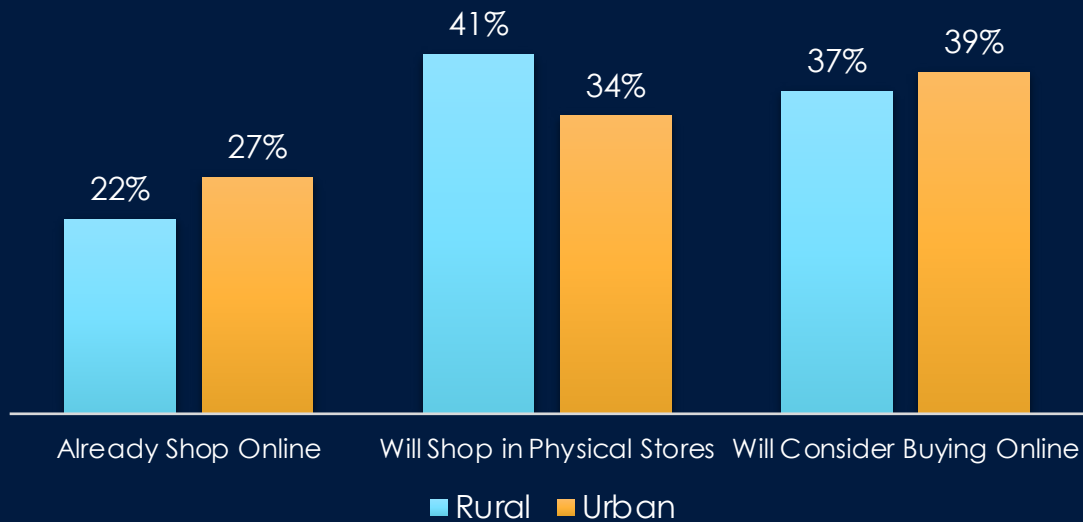


**GET INTO THE  
SEGMENTS**  
**RURAL VS URBAN**

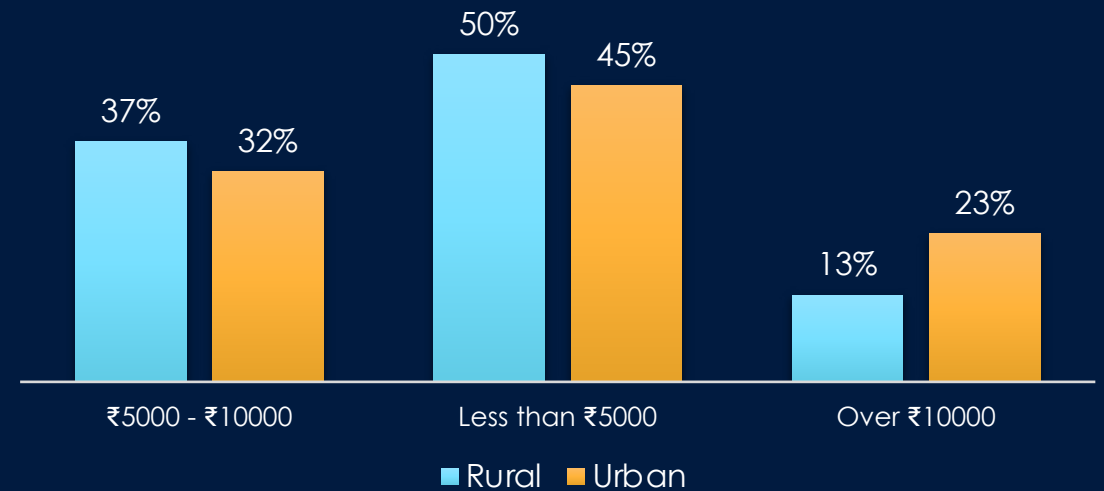
# URBAN INDIA WILL BUY ONLINE AND MAY SPEND MORE

66% of the urban dwellers say they will be using (or exploring) online channels to buy apparel this festive season. 50% of the respondents from rural India and 45% from urban India said they will be spending less than ₹5,000 this season compared. 23% of the urban residents may spend more than ₹10,000 compared to 13% of those living in rural areas.

## ONLINE VS OFFLINE

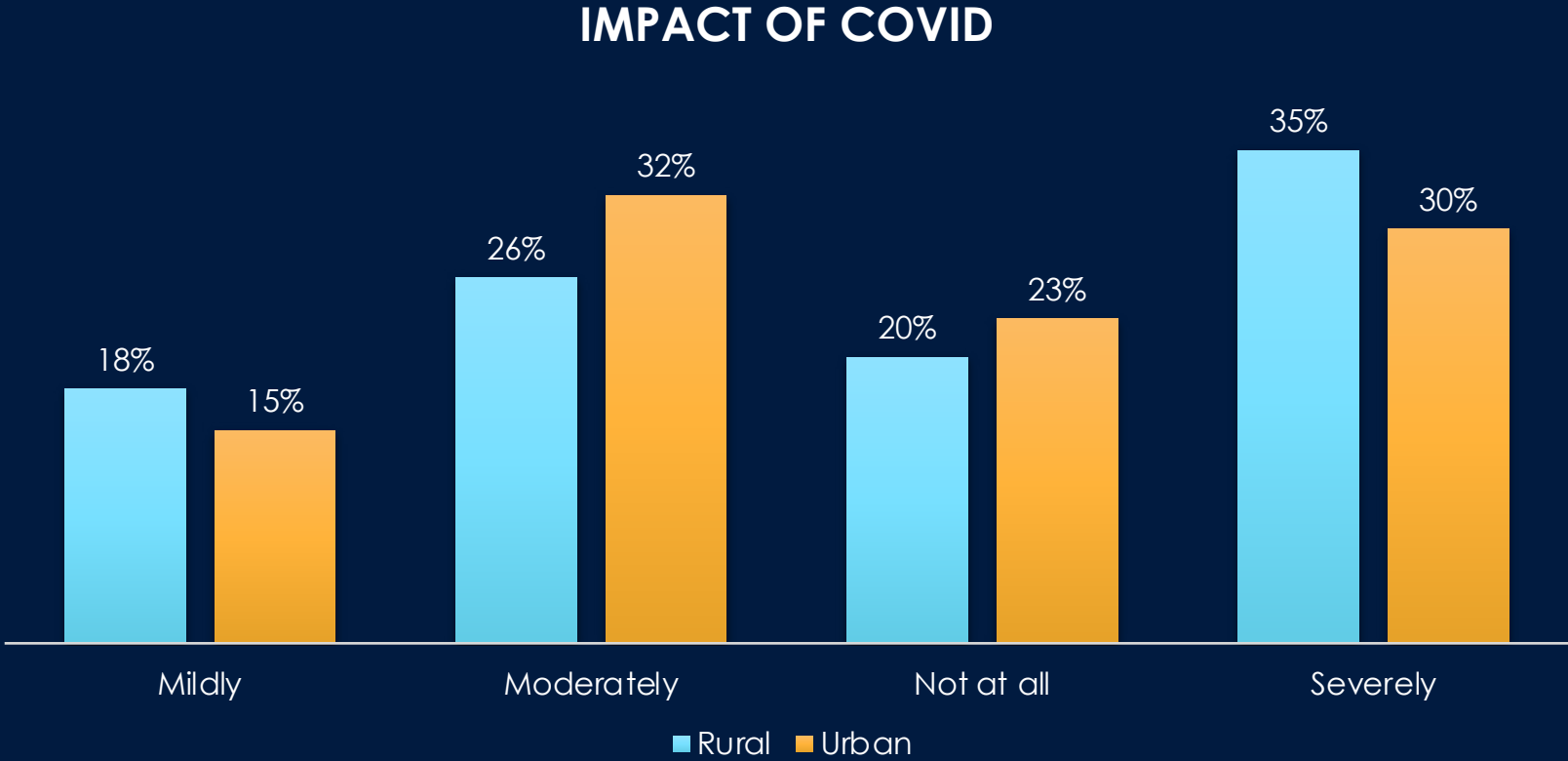


## BUDGET TO BUY



# COVID HAS IMPACTED URBAN & RURAL POPULATION ALIKE

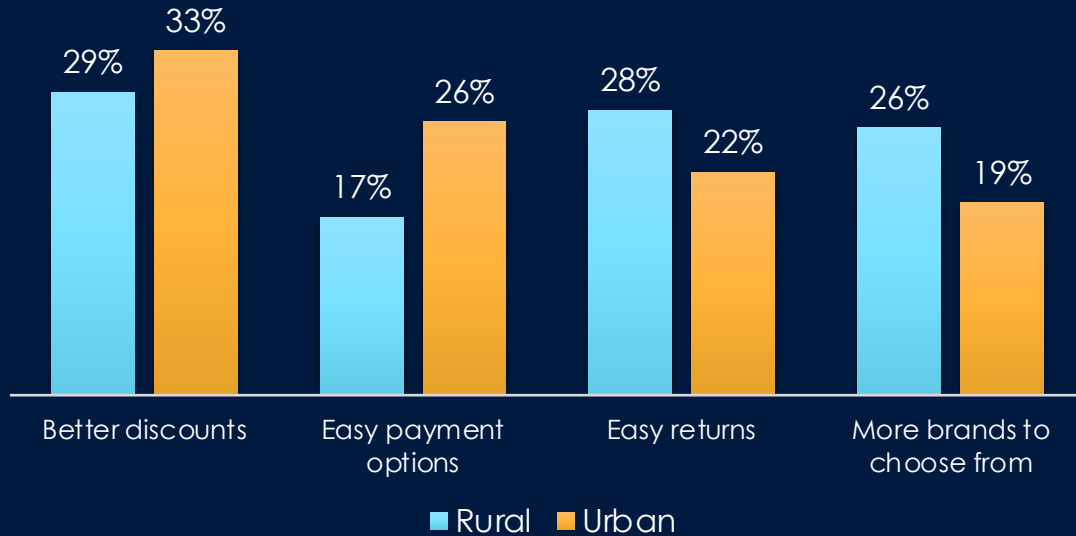
61% of the respondents from rural & 62% from urban areas believe the ongoing pandemic has moderately to severely impacted their decision (or budget) to buy apparel this festive season.



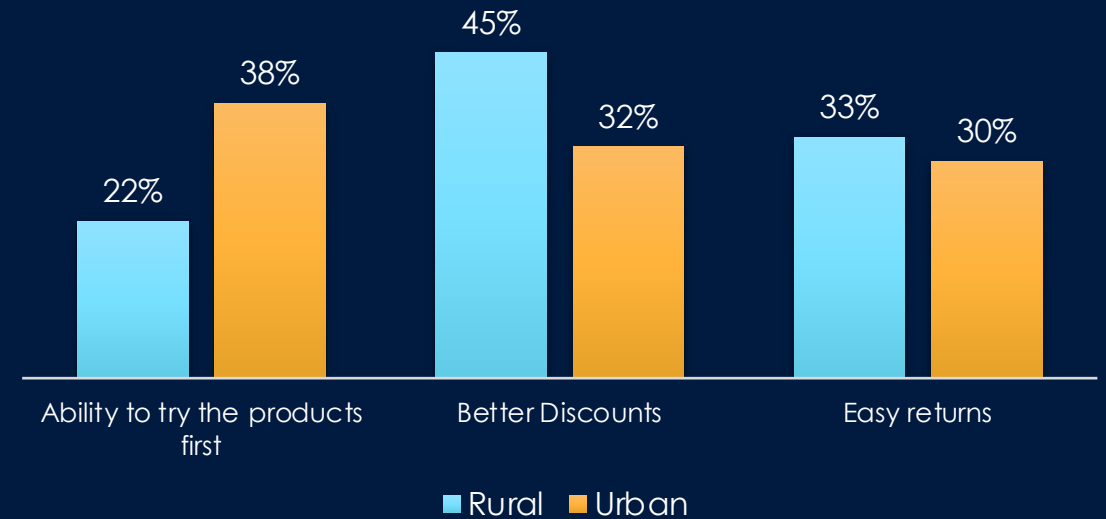
# MOTIVATORS FOR SHOPPING ONLINE OR OFFLINE

Rural respondents cite better discounts (29%), easy returns (28%), and more brands to choose (26%) as key motivators to buy apparel online. For the urban population, easy payment options (28%) come next to discounts (33%). When asked about shopping offline, rural population again cites better discounts as the key driver whereas for urban dwellers ability to try the products is most enticing.

## WHY BUY ONLINE



## WHY BUY OFFLINE





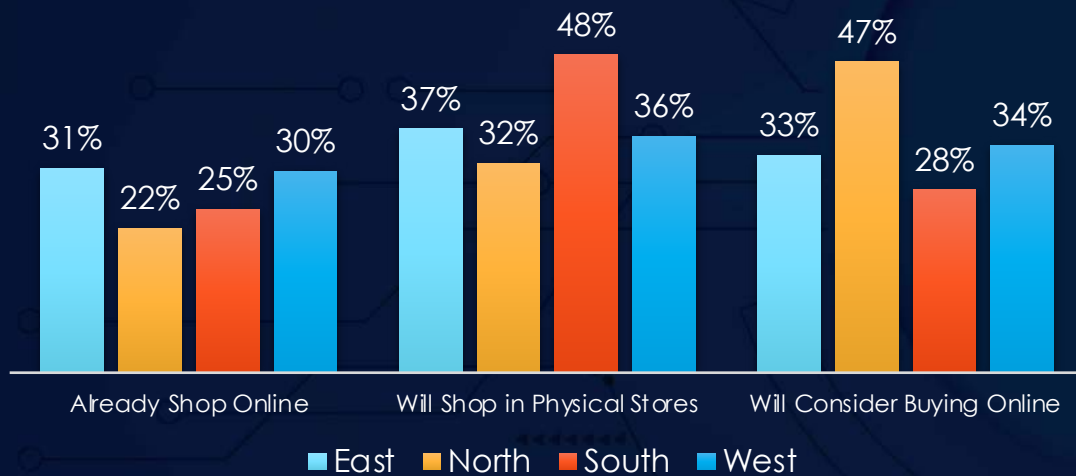
**GET INTO THE  
SEGMENTS  
REGIONS**

# NORTH INDIA WILL DRIVE ECOMMERCE SALES

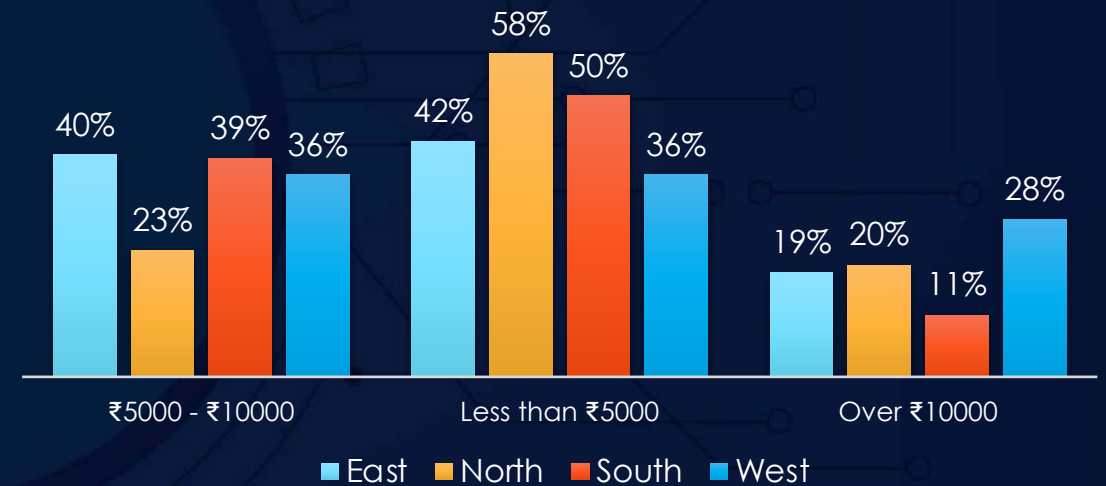
47% of the respondents from northern states say they will be exploring online channels for purchasing apparel this season. At the same time, 48% of the respondents from south India say that they will be buying apparel from offline stores this festive season.

Respondents from western states may spend highest (54% say they may spend more than ₹5,000).

## ONLINE VS OFFLINE

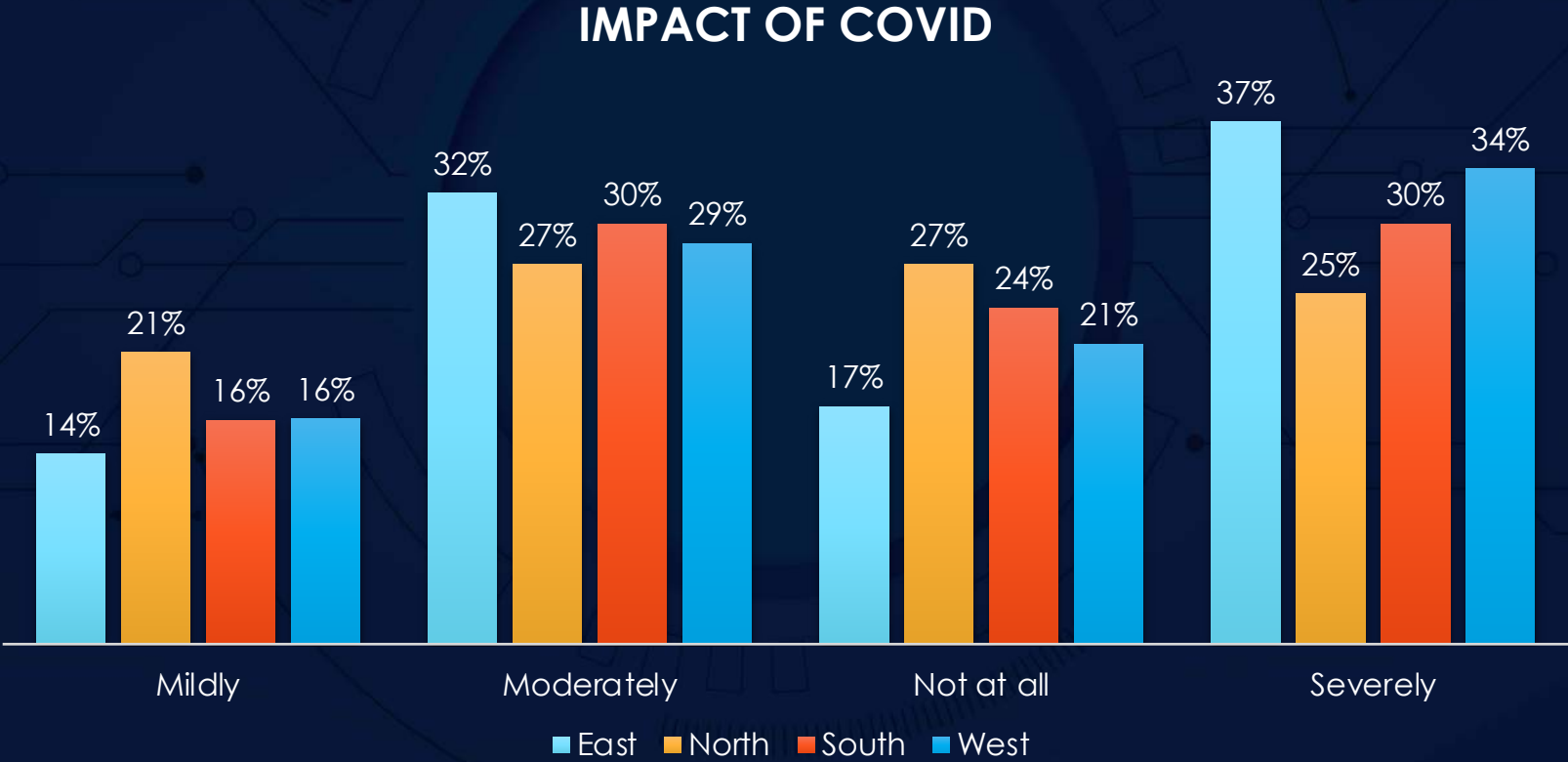


## BUDGET TO BUY



# EASTERN & WESTERN STATES IMPACTED MORE WITH COVID

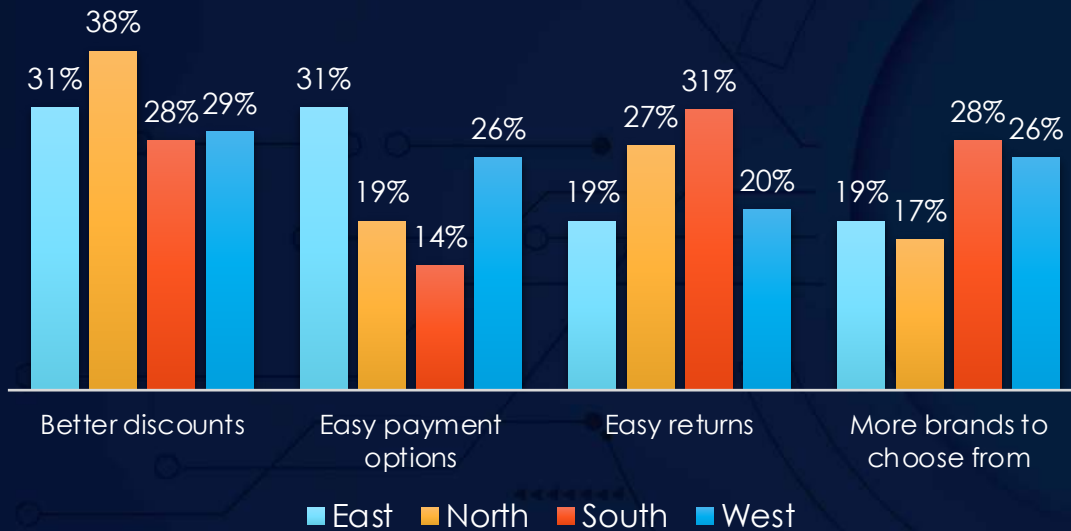
69% of the respondents from east & 63% of those from west regions say that their decision to buy or ability to spend on apparel was impacted moderately to severely due to the pandemic.  
North has the highest (27%) share of respondents who say their decision isn't affected at all.



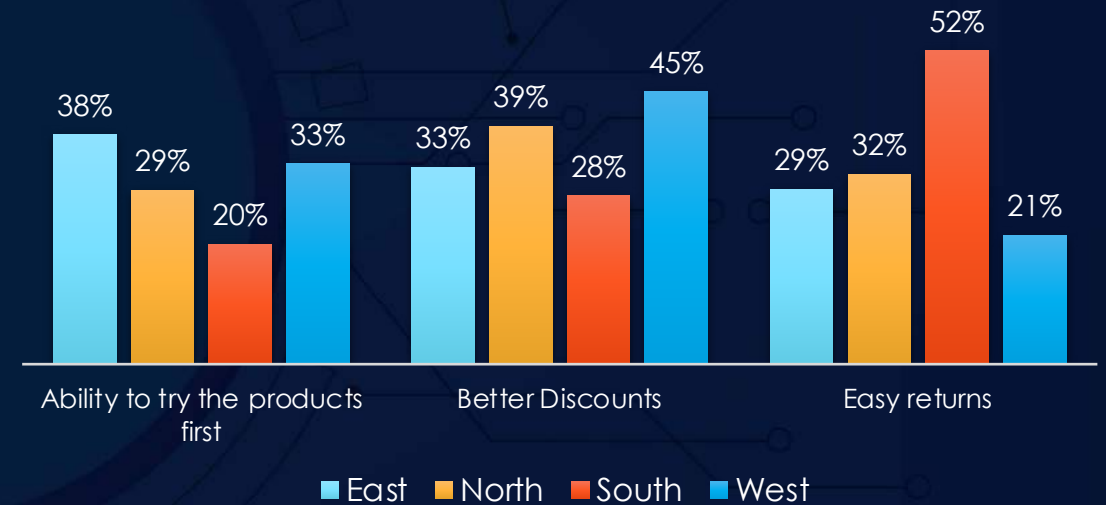
# NORTH PREFERS DISCOUNTS & SOUTH PREFERS EASY RETURNS

Whether buying online or offline, respondents from the northern states cite better discounts as their key criteria to purchase apparel, whereas the residents of the southern states believe easy return policies is their key motivator. Respondents from east region seem to prefer convenience while buying. While buying online they cite easy payment options as the key motivator whereas for offline purchases ability to try products comes on top.

## WHY ONLINE



## WHY OFFLINE







**AROSCOPI**  
**INSIGHTS**  
**SOLUTION SUITE**

# AROSCOP INSIGHTS SOLUTION SUITE BEHIND THE STUDY



**COMPASS** (COHORT BASED MEDIA PLANNING AND AUDIENCE SEGMENTATION SYSTEM) ALLOWS IDENTIFICATION OF THE RIGHT SUPPLY SOURCES, DOMAINS, URLS, AREA OF RESIDENCE (URBAN VS RURAL), ZONES (NORTH, SOUTH, EAST, WEST) AND SEGMENTS TO APPROACH FOR THE STUDY.

**DART** (DATA ANALYTICS FOR RESPONSE & TARGETING) MAPS THE RESPONDENTS TO INDIVIDUAL USERS PROVIDING RICH DATA INCLUDING DEMOGRAPHICS, LOCATION, INCOME BRACKET, INTERESTS, INTENT AND BROWSING PATTERN AMONG OTHER SIGNALS.

TARGETED DELIVERY OF INTERACTIVE (QUESTION) ADS GIVES UNPRECEDENTED CONTROL ON WHO IS PARTICIPATING IN THE RESEARCH.

# AROSCOPI INSIGHTS SOLUTION SUITE – FEW USE CASES

## BRAND

- Brand Recall
- Brand Recognition
- Brand Identity
- Brand Image
- Brand Loyalty
- Expansion Analysis
- Customer Profile
- Consumer Sentiments
- Brand Affinity

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compass

dart

INTERACTIVE CREATIVES TO RECORD RESPONSES

FIND THE RIGHT CONTENT & CONTEXT OPPORTUNITIES

MAP RESPONSES TO INDIVIDUALS USING DMP & DATA SCIENCE

AROSCOPI DEMAND SIDE PLATFORM (DSP)

## INDUSTRY

- Market Segmentation
- Product Testing
- Gap Analysis
- Competitor Research
- Identifying New Segments
- Trend Analysis

## CAMPAIGN

- Advertising Testing
- Channel Efficacy
- Creative Testing
- Brand Lift Study
- Reach Analysis
- Location Analysis
- Ad Recall Study
- Audience Mix
- Sentiment Analysis



## GET IN TOUCH

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