

SUMMARY OF FINDINGS

Indian Apparel Industry

- > As of 2013, India's apparel market is estimated to be \$41 billion and is projected to reach \$120 billion by the end of 2020.
- > 24% of online users in India access apparel websites. Of which 50% purchases happens through mobile as opposed to 34% in the US.
- > Increase in high speed internet connectivity and use of mobiles has attracted lot of young Indians to buy apparel online.
- > Access to international clothing by e-commerce sites like Jabong, Amazon and Myntra has led to increase in many foreign brands to open brick & mortar stores/websites in India.

Why people prefer online shopping?

- > Easy to purchase from the comfort of their home and save valuable time.
- > Deals and offers, ability to buy clothes cheaper than in stores at all times.
- > Different styles & variety, size availability while simultaneously comparing prices is better online.

Challenges faced by brands

Rise in e-commerce platforms with competitive pricing, flash deals pose a threat. (Flipkart's - Big Billion Day, Amazon - Great Indian Sale)

Myth busters

- > Indians are using internet more for shopping than for social media.
- > 98% of women use apps for shopping compared to 81% of men.
- > Men's clothing and footwear are the most frequently purchased products online compared to women in India.

DIRECT COMPETITORS



STRENGTHS

- Easy navigation, clean UI.
- Try & Buy (Option to book a clothing for trial in nearest store)
- Quick buy feature.
- Microsite blog (Friday Living) for shopping inspiration and fashion tips and trends.

WEAKNESSES

- Lack of chat agent/chatbot.
- No option to clear filters.
- Difficult to use check size feature.
- Too many product suggestions (similar products, recommended products, favorite products).

PROVISIONAL PERSONAS



BUDGET BUYER
18 - 25 years

GOALS

- Buys decent clothes at low price.
- Saves up money to buy clothes during sale.
- Values trendy clothing at affordable price.

PAINS

- Not finding desired style in the expected price range.
- Spends time browsing.
- Won't buy products immediately.
- Hesitates to pay for shipping.



STRENGTHS

- Excessive collection for all age groups.
- High quality images for clothes.
- Accessory suggestions for outfits.
- Search in store option to see if a product is available in stock in the nearest store.

WEAKNESSES

- No grid view option, takes time to scroll through each listing.
- Poor legibility of fonts.
- Registration has too many fields.
- Lack of colors to identify important functions.
- High shipping costs.



WISHLISTER
25 - 35 years

GOALS

- Makes a purchase only when its needed
- Browses lot of websites/apps for best prices

PAINS

- Almost never purchases wish-list items.
- Afraid of making wrong choices for purchase
- Buys only on payday



STRENGTHS

- Wide variety of collections.
- Search feature carries high level filters to narrow down results quickly. (Color, Budget, Occasion)
- Pop-up in UI to differentiate products on sale.
- Free shipping on all order values.

WEAKNESSES

- Doesn't have an exclusive website. (A micro-site under nnow.com)
- Filter options covers more screen space / too many filters.
- Product categorization/terminology is incorrect in many pages.
- Product page does not have breadcrumb for easy navigation.



DEAL HUNTER
18 - 30 years

GOALS

- Uses coupons/codes for discounts.
- Compares offers across different sites/apps.
- Always gets the best deals.

PAINS

- Won't purchase without an offer.
- Spends a lot of time browsing for offers.
- Buys only during a sale.

OTHER COMPETITORS



STRENGTHS

- Sells variety of international + regional clothing brands, accessories.
- Flash sales 'round the clock.
- App/Browser notification to show sale and offers.
- Referral bonuses.

WEAKNESSES

- Listing sub-standard brands with cheap quality apparel.
- No option to view list of all brands.
- Listing pages load from the beginning after viewing a product.
- User's can lost in the sea of listings/can easily get distracted with too many options.



FASHIONISTA
18 - 25 years

GOALS

- Is up-to-date on fashion trends.
- Prefers stylish clothing.
- Buys expensive merchandise.
- Shares purchases on social media.

PAINS

- Dependent on parents to buy clothes.
- Highly selective and prefers variety.
- Prefers high quality photos of products on sites/apps



STRENGTHS

- Variety of brands sold.
- Amazon prime subscription for free delivery/ other perks.
- Cashback offers and deals.
- Order tracking
- Customer reviews increases loyalty and attracts other users.

WEAKNESSES

- Unverified sellers list sub standard clothing.
- Cheap knock offs of branded clothing
- Too many listings lead to more browsers than buyers.



FAMILY SHOPPER
35 - 55 years

GOALS

- Seeks value clothing for themselves/kids at a decent price range.
- Values discounts/deals.

PAINS

- Doesn't have time to browse.
- Spends time reading reviews.
- Shops under a budget.
- Hates to return products.
- Prefers in-store purchases.