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INTRODUCTION

INTRODUCTION

ABOUT THE COMPANY:

Health care concepts are a consultancy providing strategic business solutions to other business organizations in the FMCG, HEALTHCARE and PHARMA sectors. One of the current clients of the health care concepts is a Tirupur based export-oriented company called **Stallion garments**, a business venture with a turnover of 20 million USD, and 200-strong manpower. Its vertical manufacturing facility houses the latest in terms of machinery and ecofriendly processes. The company has the ISO and WRAP certifications to its credit. It was established in 1987 and is the manufacturer for some of the World's biggest multinational brands. Primarily into export of inner wear and outer wear garments, the Company is currently exploring the domestic market, the reason being:

- Increase in the disposable income of people
- An untapped generic market with a vast potential
- Increased brand awareness amongst the people
- Higher education and personal hygiene levels
- A fast-expanding middle class and upper class in terms of economy

The inner wear market in India is currently valued at Rs 8000 crore in value terms and 80.16 crore in volume terms. The Indian Lingerie industry is poised for a great leap ahead due to the growing domestic demand coupled with huge export potential. There are more than 1000 Indian brands present but only 200 to 300 are active nation wide, remaining cater to markets in the vicinity of their manufacture. The last 15 years has witnessed an increased inflow of many multinational brands in the Indian inner Wear market. Many foreign companies

companies have already setup or are in the process of setting up their manufacturing units in India in collaboration with local players. India's vast resources, skilled man power and infrastructure attract a lot of foreign investment in the inner wear segment. The information presented in this report would benefit industries/ organizations, that plan to enter this segment, in terms of market segmentation and consumer preferences.

MARKET PLAYERS

The inner wear market is flooded with the best of Indian as well as international brands.

- a) Associated Apparels Pvt. Ltd launched the world's famous Maiden form bra Jockey men's underwear and swim wear in 1962 in India.
- b) Peter pan from dawn mills in the 70's entered the market, (lingerie bandwagon), it was one of the favorites in the Indian market, but two decades later it vanished from the market.
- c) VIP: - a major player in the men's segment launched Petals, a lycra moulded cup bra with motifs, which was considered a head of its time and was discounted, but its lovable launch in 1996 proved a success when they brought in a foreign brand but made in India Lovable was followed by feelings, a domestic offering along with Daisy Dee. Vanity Fair was launched in 2004 and woman innerwear also in 2004 and finally a Korean brand TRY for men and Women in 2004.
- d) Another big brand in the Lingerie market is Rupa and Co. started in 1985. its range of men's, woman's and children's under wear makes it India's largest manufacturer and seller of inner wear.
- e) Other brands that are making their presence felt in the Indian inner wear market are Amul, Luxcozi and Dollar club. The various local brands are Neva, Body care, Softy, Lady Care, little lacy, Red rose, sonari and many more.
- f) The foreign brands like Jockey, calida and Libertyblu. Then the very high fashion Gossard came for a limited period. The other foreign brands are Marks and Spencer, Triumph, Enamor and other entered through Gokuldas. Aubade opened its only outlet in Mumbai Lasenza and Hanes are the other brands in the sense.

KID'S WEAR MARKET GROWING

The kid's wear market in India including uniforms has seen a growth of 18.2 percent in the year 2007, while kid's wear market witnessed annual value growth of 22.5 percent in 2007 as

compared to 2006(SAYS INDIA APPAREL REPORT BY IMAGES F&R RESEARCH) which has been published in recently released images year book 2008.

According to the research, the kid's wear segment has grown at the rate of 15.6% in value terms and 4.36 in volume terms in 2007, so there is a great opportunity to the Indian companies to manufacture quality products by keeping the customers needs and preferences under consideration. The people of India especially the middle class are spending there disposable income very wisely by taking all the necessary and required information about the products. They always want a better quality at the reasonable price, also the needs and preferences of the people living in different areas are different so the firms should always manufacture there innerwear garments according to the preferences of the people.

The greatest obstacle to the healthy growth of this market is overwhelmingly large supply of unbranded kid's wear in the market. The volume share of kid's wear segment in the total apparel market stands at 24.5 percent as against 14.1percent share in value terms. The growth in value is exceptionally high in all kid's wear ranges. There is over 37% rise in the super premium range, 35% percent in the premium range and 21.5% in the mid range. The economy and mass range saw 13.4% and 6.7% growth, respectively.

The uniforms category has grown at the rate of 22.5% in value terms and 9.3% in volume in 2007. Out of this the school uniforms is a largely volume driven segment and its total volume share in the total apparel market stands at 9.7% as against 9.4 % share in value terms. The trend is towards a faster growth in value as compared to volumes, indicating that buyers are willing to shell out more for comfortable and quality offerings if, available.

Uniforms are dominated by tailor made garments as against ready-mades, but branded offerings are fast increasing their market share within this category. Thigh value and volume growth in 2007 in the uniform segment is suggestive of a high potential for acceptance to branded uniforms.

Two major factors have contributed largely to the growth of the designer market for kid's. The first is the emergence of children as independent buyers and second is their obvious preference for brands. This shift could be because of the rise in income of the parents their awareness of the world of fashions as flashed by mass media especially TV, and also peer pressure. Today children are so far more informed and aware of the latest trends in clothes compared their counter parts of yore. As a result children apparel (clothing for kid's between 1 and 14 years of age) is a market rapidly growing. According to one of the sources the market for kid's apparel in India exceeds rupees 13000 crore of which around Rs 3000 crore belong to

branded kid's wear growing at the rate of 18.2 percent (including uniforms) per annum, it is now one of the fastest growing markets.

Some of the leading global brands in children's clothes today include Armani junior, Burberry kid's, DKNY kid's, Baby Dior and many more. More than ever before, clothing is about effortless pairing forgotten trying to match color to color or even mood to mood. Ease is interpreted in the softness of these seasons' fabrications.

BABY SEGMENT

Karnataka is a market with good buying potential due to the presence of more rich people and a mix of different cultures with different preferences and because of this there is a huge kid under wear market. People now and then want to buy a quality under wear for their kid's. The market of Karnataka is full with potential and avid shoppers. In Bangalore Kanz, the leading German kid's wear was launched in the last September. Esprit is another popular brand present in the market with price starting from Rs 450 and going up to Rs 2000, in keeping with other premium kid's wear brands available in India. Bossini has launched the "pop star" collection for kid's. "Ruff kid's" is yet another large selling brand complemented by wide variety of accessories such as socks, under garments etc. Raymond has launched its first store for kid's apparel called "Zapp". In a nutshell, today the sky is the Limit was kid's wear is concerned.

GENERIC MARKET

The future of inner wear market is very bright but it needs a deep survey of the various marketing Channels in order to promote the product and develop market image. Most of the market in the inner wear sector especially for kid's is unbranded, and only some brands are used by the people of high Income. In men's inner wear market the top brands comprise only 24% of Sales volume, other brands only 8% and 68% is unbranded. In women's inner Wear market top brands comprise only 2% other brands consists of 24% and 74% is unbranded, while the kid's inner wear market is almost 80% Unbranded.

The modern India's economy's rising last year the GDP touched 9.4% and in this it is forecasted to be 9% app. and the disposable income is creeping and Provides a good opportunity to the inner wear manufactures to manufacture quality products maintain a good value chain in order to be the leader and gain the maximum market share. Coming out of shadows of men and women branded clothing, the kid's wear branded clothing is growing faster and bigger. Dressing up kid's has taken a whole new route in urban India today. New brands, fresh

colours, designs and fabrics that suit your little ones is being taken very seriously, making branded kid's wear an imperative segment for retailers today. Retailing of kid's wear, which has been overshadowed by the overpowering apparel brands of men and women, is now evolving as a major market dominated by the unorganized players, the kid's wear market is now seeing a slew of domestic and international labels joining the bandwagon. The market which had a hand full of brands such as Gini and Jony, Weekender, and Lilliput the kid's wear segment now has new entrants like Raymond, Esprit, Barbie collection, Mother Care and Kanz in the arena.

GLOBAL BRANDS:

The fashion and brands are driving the kid's wear section; the market has attracted several players including many international labels. Kid's can now live it up with the international fashion and in their favorite global brands such as Mothercare, Esprit, Kanz, Bossini, Benetton and Mona Lisa." As per plans in five year's time, India begins such a huge market, Kanz's turnover out of India would be better than the other countries. As of now Kanz retails in about 30 countries, India would contribute maximum in about 3 year's time", says Abishek Chandra saroj, business Head, Kanz (Prateek lifestyle Ltd). Another premium life style brand Esprit too has entered the kiddie's world with its exclusive collection of kid's wear. Esprit kid's offer products of International fashion, that uses natural fibers and products which are safe to suit the sensitive skin of children. Manjula Tiwari, country Head-Esprit, India explains, "Esprit kid's will now complete its brand product portfolio, now offering stylish look for the entire family." While the international labels are making their presence in India, even domestic apparel brands are extending products for kid's. Raymonds, which offers fashion for a complete man, recently launch its kid's wear collection "Zapp". Zapp is not just an add brand, but an integral segment to bring international fashion into kid's wear. New entrants are definitely hotting up the branded kid's wear area, and even existing players are also pepping up their merchandise and providing value added services to woo customers. As for Lilliput kid's wear, a leading kid's apparel brand which came out with its first store in 2002, competition is always welcome as it is constantly gives scope for improvement.

Gini and Jony recently launched an exclusive kid's retail concepts called Freedom fashions, which has a whole range of accessories and clothing brands for kids from the age of 0 till 14 years." Freedom Fashions is a unique concept for the first time ever to be launched in India. The store will be a one stop complete wardrobe solution for kid's, with services like

designer wear, wardrobe consultant, juice Hair saloon and many more such unique services.” Besides, large brands even small players are entering this area, for example the store christened Appleomyiis an innovative format speciality store that offers products and services for pregnant woman, young mothers, infants & children between the ages of 0-6 years. The 4000 sq ft flashing store located in various varities. Brands including Espirit, Giny & Jony, Lilliput, Zapp and Kanz are increasing their presence and opening more exclusive stores. “The expansion of Kanz would happen predominately through multi brand out lets and large format stores including Lifestyle. Zapp of Raymond’s, which currently has 18 stores, plans to increase to 24 in the next few months. While some retailers are increasing the number of outlets to each more customers, few brands are giving more importance to enhancing their product portfolio, in order to stand out.

DOMESTIC BRANDS

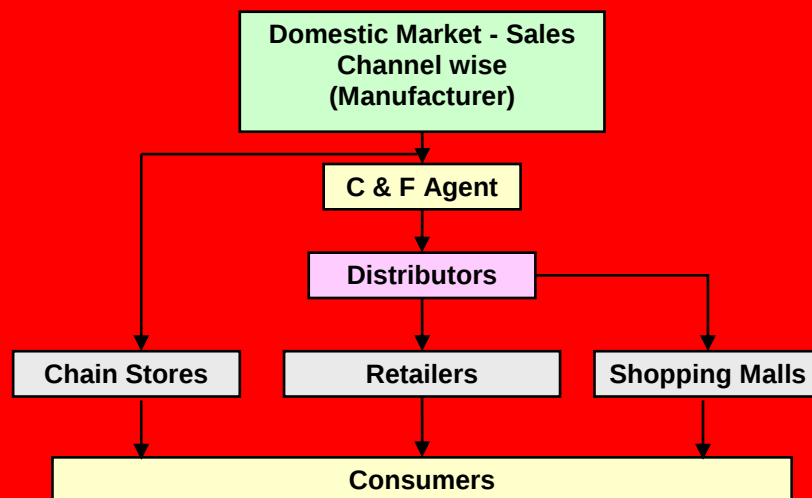
These are the brands that have a domestic base for manufacturing and marketing. There are various domestic brands which have a very good image in the market and are getting good market share. The people have shown a very good interest in buying these brands and are very happy about the material, quality, and comfort level of these products. Some of the brands that are manufactured and marketed in India are VIP, RUPA, EURO, LUX Etc. Among these brands VIP, EURO, also produce the products for kids. Some other domestic brands that are made for kids are, little kids, Bratt, Cucumber Zero, Mums, inimals, Mushroom, Chariot, Chicita, John, bravo, Fundeez Redrose. These products for kid’s are of better quality, good comfort level, varieties in shapes, colours, designs, and the parents are happy with these brands but still there is a large market which is unbranded, and the parents are not willing to buy the branded products because of the various reasons.

- a) The unbranded are also of better quality.
- b) They are available in various shapes, designs, colours etc.
- c) They are economical.
- d) They are easily available.
- e) Children out grow very quickly.

The children’s inner wear market of the Indian retail is set to boom with international brands such as Monalisa, Disney, Mother care. The children’s inner wear market in India is estimated to be worth rupees 130.85 billion, and is 15% of the total apparel market of India showing the

potential of its growth. Every parent thinks that the inner wear is a need for the children as it is the part of personal hygiene, keeps the child fit and comfortable. Mostly they prefer the material cotton, with soft texture, good absorption, and availability in the different patterns. The average annual spend on the children's innerwear is 400-600 rupees and the frequency of purchase is three months to six months. The parents are facing various problems in their Children's inner wear like the inner wear loses shape after few washes, it is not durable. The innerwear is not very absorbent and the elastic is rough that hurts the child's tender skin. The people of Karnataka especially the middleclass and the upper class people always look for the better quality, better fit and no matter what the price of the product is. The branded inner wear for the kid's are usually bought from the retail stores and malls and mainly mother is responsible to buy the child's inner wear.

Innerwear Value Chain: Structure



PROFILE

COMPANIES MANUFACTURING INNER WEAR FOR CHILDREN.

There are a no. of companies that are manufacturing kid's inner wear, some of the companies are

DS Corporation.

Body care international ltd.

Gini and Jony ltd.

Lilliput kid's wear ltd.

Raymond apparels ltd.

Trent ltd.

The profiles of some of the companies are as under:

BODY CARE INTERNATIONAL LIMITED.

About the company: -It was established in August 1992, body care is one of the most popular names involved in the manufacturing and supply of intimate apparels and garments in India. They are manufacturing men's Undergarment, women's undergarment, panties, camisoles, vests, Underwear and kid's undergarments. The company is promoted by Mr. Satish Gupta and Mr. Sanjay Dawar. Mr. Sachin gupta is the director of the company. The company is located in pataparganj Delhi. Bodycare name is renowned for its vibrant, cutting edge colours quality fabrics and trend inspired designs. The collection ranges from comfortable, stylish innerwear and easy wear to sensuous lingerie.

Kid's underwear

The kids wear is manufactured under:

Basic- bloomers, vests, underwear sets, micky mouse under wear. Premium- Briefs, vests, Disney range, new born baby under wear, infant under wear.

Quality

From choice of fabrics and raw materials to the creation of lines every piece is controlled by adopting severe quality control criteria.

Emphasis

Eco friendly production process

On time delivery

Prompt customer service

Excellent export packing.

Infrastructure and Marketing:

The company is equipped with five fully automated state of the art plants with sophisticated technology and machinery. The company bears 450 workers who are well trained and skilled. The monthly production is about 10 million pieces, and in this span of time body care is established an impressive all India marketing and distribution network of 160 distributors that cater to more than 800 retailers all over India.

Clients

The company believes in customer satisfaction and they are known as the customer savvy company and the company has developed a firm customer base in the markets of South America and UAE and also involved in directed exports to Russia and Tanzania.

Business type

Exporter, manufacturer.

Total capital: 8-10 crores

Sales volume: 300 million rupees.

GINI AND JONY:

Promoters of Gini and Jony The company is promoted by three dynamic brothers, Mr. Prakash Lakhani- directly involved in the marketing, retailing and distribution of gini and jony. Mr. Jaikishan Lakhani- with a prudent vision and an eye for detail looks after the purchasing and manufacturing of the products. Mr. Anil Lakhani, he looks after the creation of designer wear for kid's and works closely with the comparative designers.

Professional team at work.

Gini and jony strongly believes in empowering people so that they can produce their life's work in creating day in day out. It is a flat organization and seamless interaction between every one of our 2100 employees and ensures that the company is focused on delivering the very best on time, every time. The products define the future fashion statements of kid's and young adults. The companies cater the needs of both boys and girls group from 6 months to 14 years and the company has a wide range of products.

Quality.

The company believes in quality and the team is fully focused on quality and timely deliveries. Every material used in the manufacturing is checked by the quality control board. The company has some of the most advanced manufacturing plants in the country; capable of high quality, high volume manufacturing and they are manufacturing around 150,000 pieces per month. The company has 54 franchisees, 116 shops in shops, 32 factory outlets and more than 600 out lets in India and they believe that their journey has just started. The brands are available at all the leading premium departmental stores like shoppers stop, pyramid, life style, ebony etc at all their

locations throughout the country. The brand is available in all the up market stores at all the metro cities.

Products:

The company has a wide range of products; T-shirts, shirts, jackets, trousers, Cargos, capris, dungaree, skirts, Jamaicans, jeans and pants for girls.

LILLIPUT KID'S WEAR LIMITED

1991. The Company originally manufactured and exported women and children wear and today it has a strong base in both domestic and international markets in kid's wear. The brand Lilliput enjoys an enviable revenue in the kid's wear market with a prominent market share. Lilliput has entered domestic retail with the launch

of the first retail store in August 2002. The brand outlet's has rapidly grown and currently stands at 130 and have 150 large format multibrand outlets like shopper's stop, life style, reliance trends, pyramids and 450 point of sale. Lilliput has its presence in Bahrain and China and will expand by opening in the Middle East and 100 stores in China by 2010-11. The Company's annual

turnover is 182 crores in the finance year 2006-07 and in the same year the revenue generated from the exports was Rs 111 crores.

Manufacturing

The company has 8 manufacturing units in New Delhi and NCR with machines producing 6,00,000 units per month. According to recent studies out of the total Indian population, 30% are under the age of 12. The apparel in India exceeds Rs 15000 crore of which Rs 3000 crore is kid's branded wear, which is growing at the rate of 20% per annum which makes it one of the growing markets. Lilliput exports to some of the world's best retailers fast growing and large chains like

Gap, Wrangler, Mother care. The products consists of kid's wear for infants, toddlers, boys and girls like inner wear, night wear, ethnic wear for the children up to 12 years. Lilliput was recently, Awarded as the Reid and Taylor retailer of the year 2007, by Reid and Taylor awards for retail excellence and brand of the year award 2007 by clothing manufacturers association of India.

Aim of the company

The company believes the children are the future of the society and their well being is of prime importance to them, for which they have developed a phenomenon that concisely caters the children and weaves not just clothes but optimum care keeping in mind the sensibilities of the modern day parents.

Vision

“To be globally renowned kid's fashion leader providing with unique and comfortable styling”.

Mission

To grow as an international brand and emerge as an exclusive fashion destination for kid's.

Quality policy

Lilliput follows objective standards to maintain quality from fabric to finishing. Each garment undergoes several quality tests and is put through needle detection machine as well. The objective is to manufacture flawless garments that are accepted by the global consumers for their design, fabric, quality and feel.

Compliance and social issues

Lilliput's manufacturing facilities has been duly audited by big names like Gap, Marks & Spencer, Sears, and a host of other agencies like ITS, CSCC,STR and MTL for social and ethical norms. The company has pride in being people friendly company and an equal opportunity employer. We provide our people a healthy and hazard free work environment and reward the hard work of the people.

SAMPLE PRODUCT LAUNCH

The company is going to launch the new inner wear product for the kid's in the market and for that the careful and valuable survey was conducted and a particular process was followed. The steps involved in the process are:

Need recognition:

Need recognition is a very important step in the product development process. In this step a valuable information was collected from the parents of kid's through the questionnaires and schedule in order to what type of colour , material, designs and the price range the parents actually look for when buying the kid's innerwear.

Information search:

The information about the various products that are presently in the market was mainly collected from the various sources like news papers, internet and the primary data was obtained by questionnaires and schedules to know what type of product for the kid's is available in the market, what is the price range, quality, colours, patterns and the material as this will help the company to create a product which can bear all these attributes.

Evaluation of the alternatives:

There are a number of products in the market available at different prices, colours, shapes, sizes, material for the different segments of the people based on the income and because of the evaluation of the primary data the concept was achieved and the best result was obtained to make the product which can be ahead against its competitors.

Concept development:

End users do not buy product ideas buy product concepts, so it should be kept in mind who is going to buy the product, what are the benefits of this product which can make it ahead against the competitors and then it should be tested to target end users to know their reactions as it will help in the success of the product.

Business analysis:

After the development of the product concept the management needs to prepare sales, cost and profit projections to determine whether they satisfy the company needs and if they do the concept can move to the development stage.

Product development:

After getting all the necessary information about the successful launch of the product the company should manufacture the product with all the inputs in the product and target a selected segment in the initial period.

Commercialization:

Once the product is developed then it depends to the company how many markets they want to serve and it also involves promotion of the product so that sales can be increased. Whether the company first wants to cater the single market and then later on to other areas that depends on the size and capital structure of the company.

Different strategies that I can use to launch a new product:

1. **Product strategy:** My kids inner wear product will be available in the different designs like there will be different colours, different patterns in the market under the same brand name but having different line extensions i.e. different products of the same brand.
2. **Pricing strategy:** The price range will be (300-400) for the upper class people and the upper middle class people and the price range are going to be (100-150) rupees for the middle class people. Also my strategy is to give allowances to the retailers for the positioning of the product in a short period of time and the offers will be available so that growth can be achieved.
3. **Promotional strategy:** Mainly the products are to be promoted by media like TV and News papers because every person is used of these things so that awareness can be created by giving some beautiful advertisements on children which can help me to place the product very well.
4. **Positioning and Packaging of the product:** Positioning plays an important role in the growth of the product. The products will be available in different designs with soft texture with more comfort level then the existing ones in the market. Mainly it the advertisement that will help me to position my product, the advertisement is mother and a baby in which the baby is crying loudly and the mother didn't know the reason for it. She is giving a child a lot of things to keep him/her silent but child didn't stop and then suddenly the mother changes the inner wear of the child and the child feels happy expressing the comfort and quality of my product at the reasonable price.

RESEARCH METHODOLOGY

RESEARCH METHODOLOGY

Statement of problem

Indian innerwear market is growing at fast rate with the global market. It shows increasing trends in its sales from previous years. Many competitors have come in the market to grab this growing market. So there exists a fierce competition where only the strongest can survive.

Hence a knowledge of consumers awareness, present buying habits, user behavior attitude and opinions about innerwear's and there sales performance help in formulating an appropriate marketing strategy to grab a good share in the market. Innerwear market has been classified into men's and women's and kids wear segment. Here the research study is done on estimation of market potential for kid's innerwear with particular reference in Karnataka .A study of this aspect would enable the company to take necessary actions to improve their product.

Objectives of study:

The main objective of study is to analyze the different brands of kid's innerwear and its overall market scenario with present competition.

Specific objectives:

- 1) To know the overall impressions of consumers in Karnataka.
- 2) To analyze the purchased decision of customers based on their income.
- 3) To know the response of different retailers selling the innerwear products.
- 4) To evaluate the customers and retailers satisfaction.

Methodology

The study is conducted through both secondary and primary research. Secondary data are those which are collected by someone for the same purpose and are available for the present study.

The first step is to collect the relevant information for the study to be conducted by referring business magazines, books, project reports and other articles from the news papers etc.

Primary data are those which are collected for first time and their original in nature.

There are two basic methods of collecting primary data. One is the questionnaire and other is by observation or interview. The former was chosen because it is more reliable and time saving. The answer of the respondents forms the primary data of this research. Their answers and feedback provide the necessary details for tabulation of result.

A census survey of all respondents would be impossible, taking into account the time and cost involvement. Hence a sample survey was conducted by use of questionnaire.

Questionnaire as a tool

Questionnaire is one of the powerful tools to collect the required data for market research. It is to be prepared consciously asking specific question for the customers and retailers to answer.

The questions should be well thought of after defining the problems and motto of research. The other advantage of a Questionnaire is it can be personally conveyed or by friends or through mail also and get a direct feedback. It can be updated as when required. It can be stored for any future analysis.

Sampling Techniques

Karnataka is the major center chosen for survey and information is collected from sampling technique. The method of sampling is based on random sampling and judgments sampling and categorized them into retailers and customers. The sample is merely selected on discretion and the main center is considered.

Sample size

In choosing a sample size stability of information has to be kept in mind. Keeping in view the time factor. Budget and other resources, a sample size of one hundred ten respondents were selected. The sample size was divided into 50 customers and 50 retailers and 10 distributors. The information provided by these respondents served as basis for data tabulation.

Field Work

The prepared questionnaire was selected among the respondents. The field work activities involved the data collection by contacting the respondents. The places for data collection were chosen at various areas under stratum namely Bangalore, Hubli and Mangalore for 14 days. Briefing was made where ever necessary to clear doubts and explains the concept to get a better response.

The respondents covered were from various income groups and age groups. They were chosen randomly giving no particular attention to a certain age group and in this way a broader and wider coverage could be achieved.

Plan of analysis

After field work activities are over the data collected was properly classified for further analysis. The main aim of this is to study the various domestic, global and transnational brands. Defining the product range and mix of different innerwear manufacturing companies. Creating a profile/data base of these companies. Also to study the performance analysis of companies providing different brands. Analysis is done through percentage method.

Assumptions

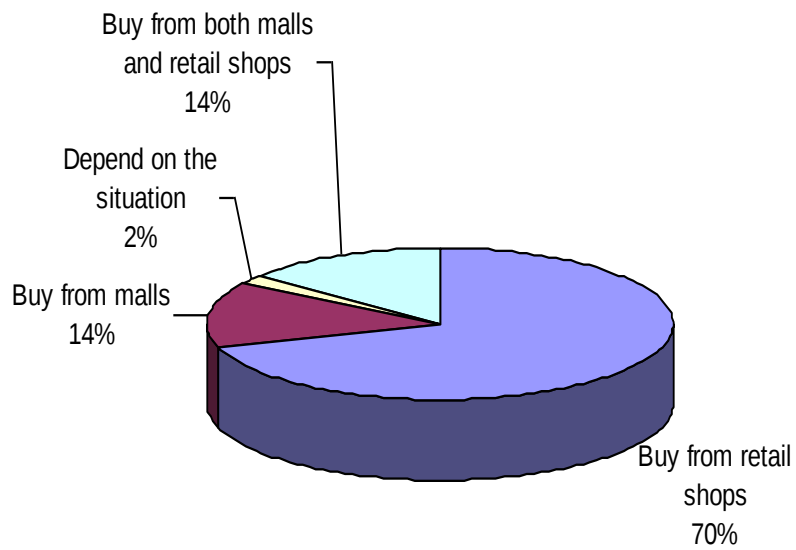
The data collected from the consumers i.e., their attitude and perception, feeling whatever they have expressed is assumed as perfect their knowledge. Since the study is mainly done based on schedule, it is considered primary data and summed i.e., complete.

DATA ANALYSIS

RESPONSE OF THE END USER (PARENTS OF KID'S)

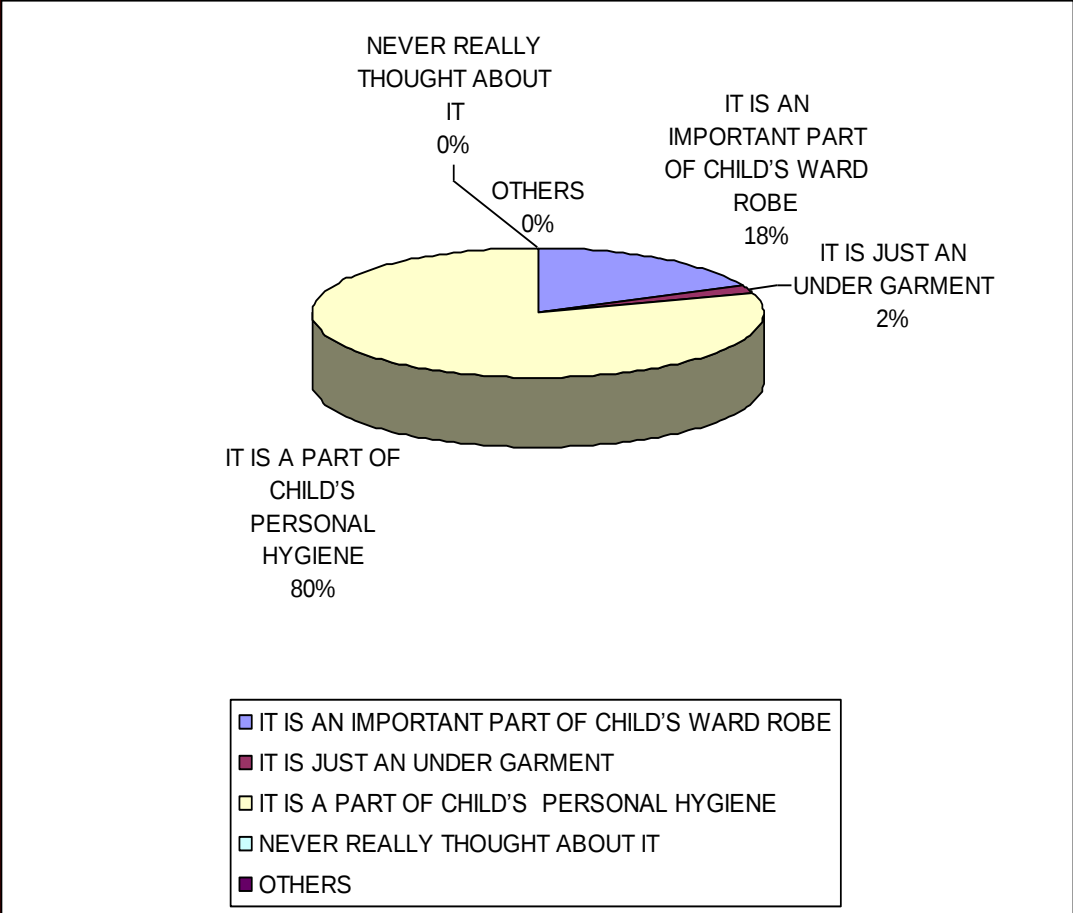
Analysis of places, end users buying the kids innerwear

Buy from retail shops	Buy from malls	Depend on the situation	Buy from both malls and retail shops
35	07	01	07



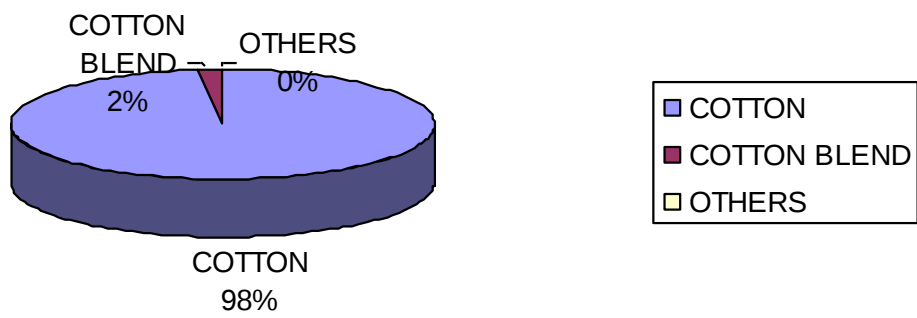
Analysis of end users perceiving the kids innerwear

IT IS AN IMPORTANT PART OF CHILD'S WARD ROBE	IT IS JUST AN UNDER GARMENT	IT IS A PART OF CHILD'S PERSONAL HYGIENE	NEVER REALLY THOUGHT ABOUT IT	OTHERS
09	01	40	0	0



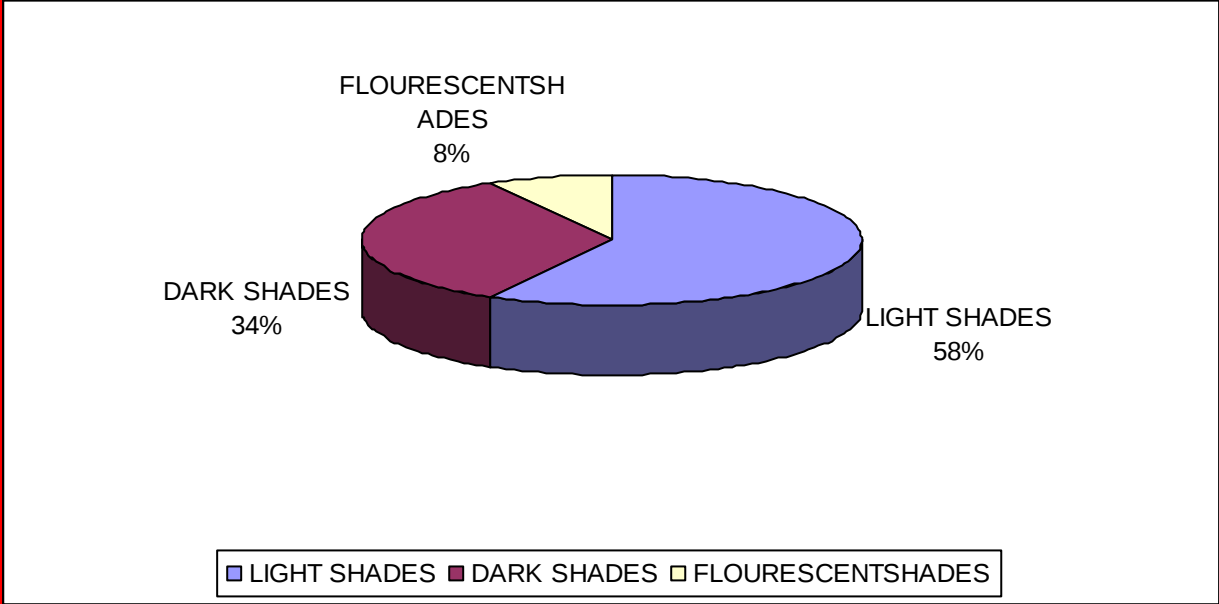
Material used for kids innerwear

COTTON	COTTON BLEND	OTHERS
49	01	0



Specific colours preferred for childs innerwear

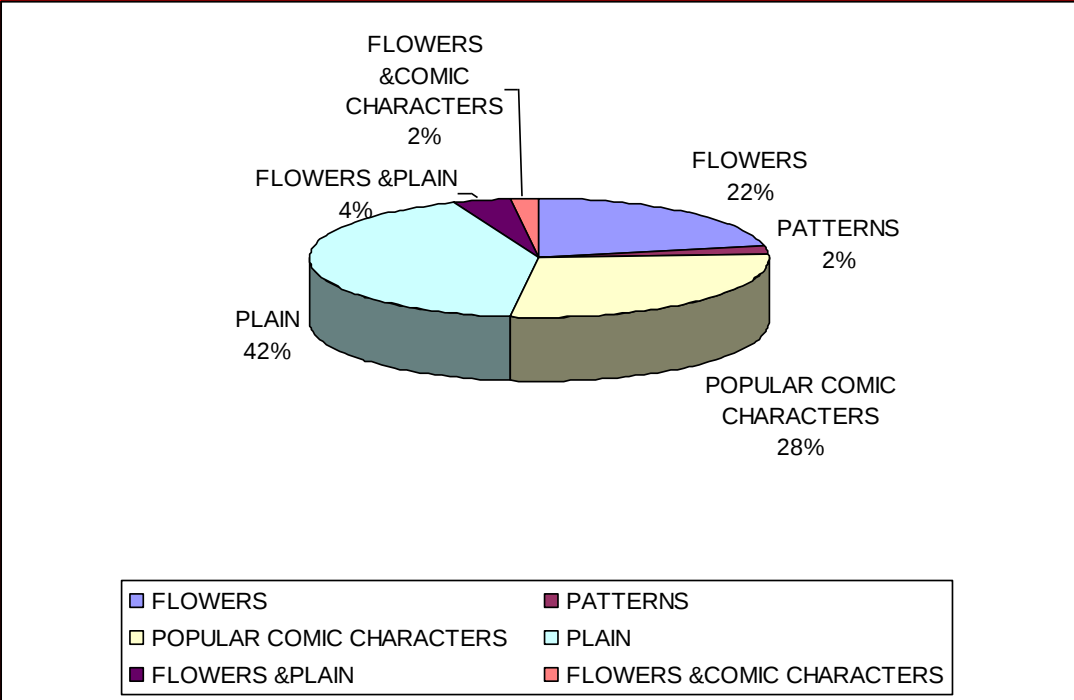
LIGHT SHADES	DARK SHADES	FLOURESCENTSHADES
29	17	04



Different types of patterns preferred

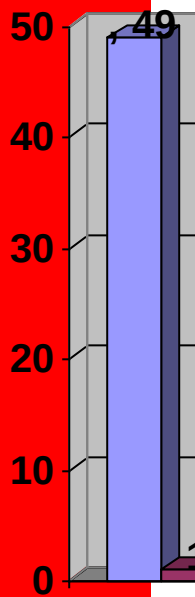
FLOWERS	PATTERNS	POPULAR	PLAIN	FLOWERS	FLOWERS
---------	----------	---------	-------	---------	---------

		COMIC CHARACTERS		&PLAIN	&COMIC CHARACTERS
11	01	14	21	02	01



Analysis of attributes for buying kids innerwear

MATERIAL COTTON,COTTON BLEND, OTHERS	TEXTURE SOFT,MEDIUM AND ROUGH	ABSORPTION GOOD, AVERAGE & POOR	EVAPORATION QUICK,MEDIUM&SLOW
49,1,0	42,8,0	43,07,0	37,13,0



INFERENCES

49 parents prefer only cotton material where as only 01 prefer cotton blend.

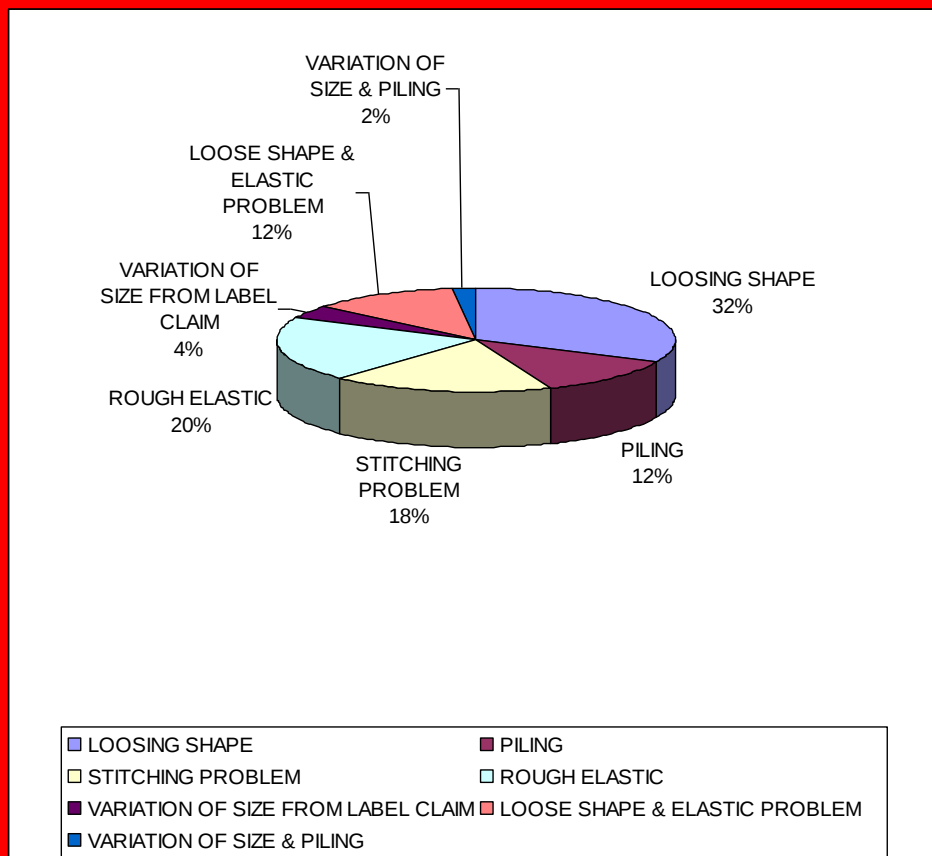
42 parents prefer soft texture and 8 prefers medium.

43 parents prefer good absorption, 07 prefer average.

37 parents prefer quick evaporation & 13 prefers medium.

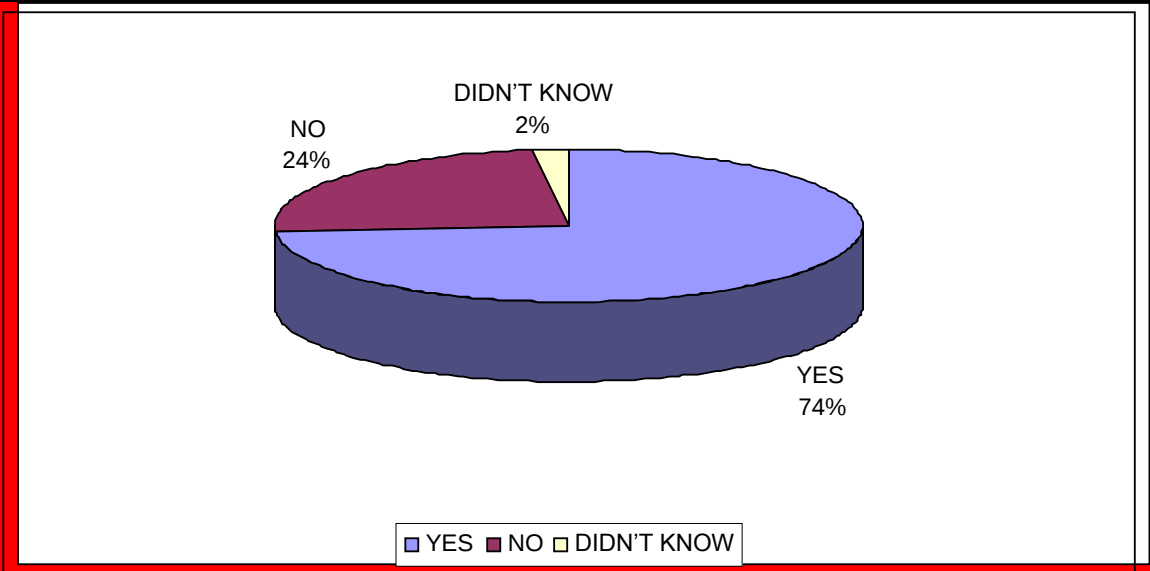
Common problems faced in kids innerwear while washing

LOOSING SHAPE	PILING	STITCHING PROBLEM	ROUGH ELASTIC	VARIATION OF SIZE FROM LABEL CLAIM	LOOSE SHAPE & ELASTIC PROBLEM	VARIATION OF SIZE & PILING
16	06	09	10	02	06	01



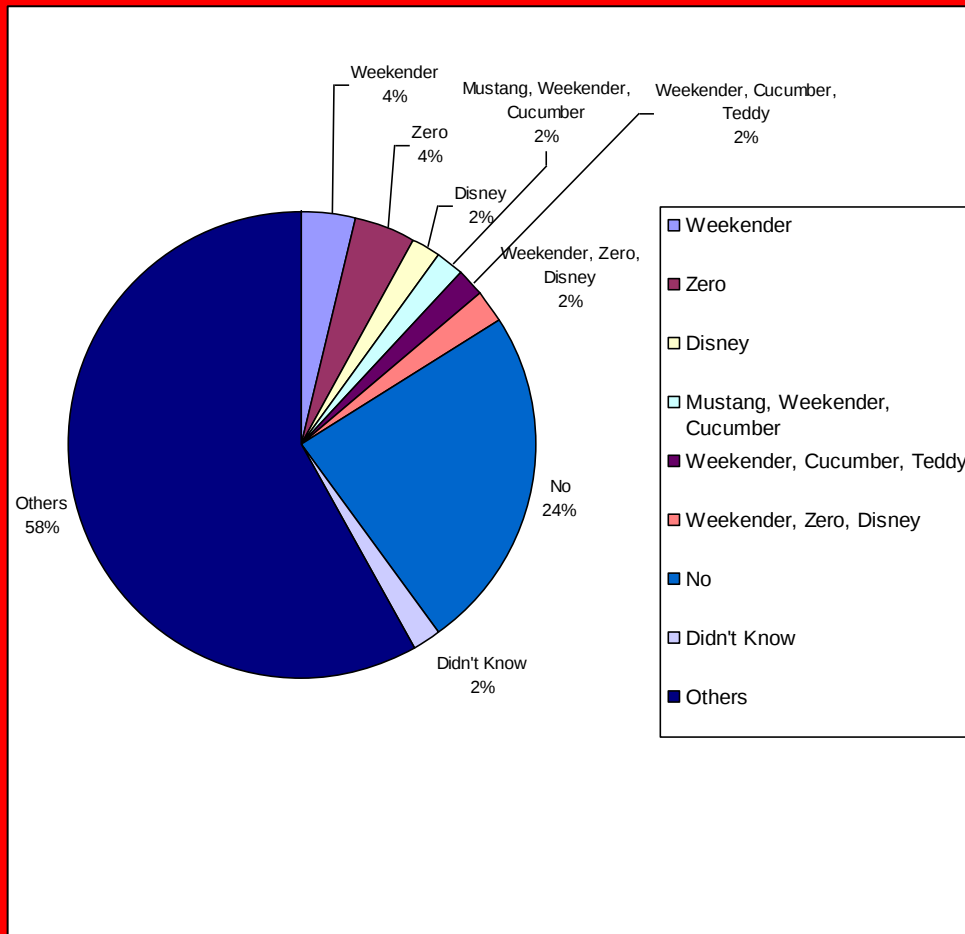
Analysis of preferred brands

YES	NO	DIDN'T KNOW
37	12	01



Factors preferred In purchasing brands

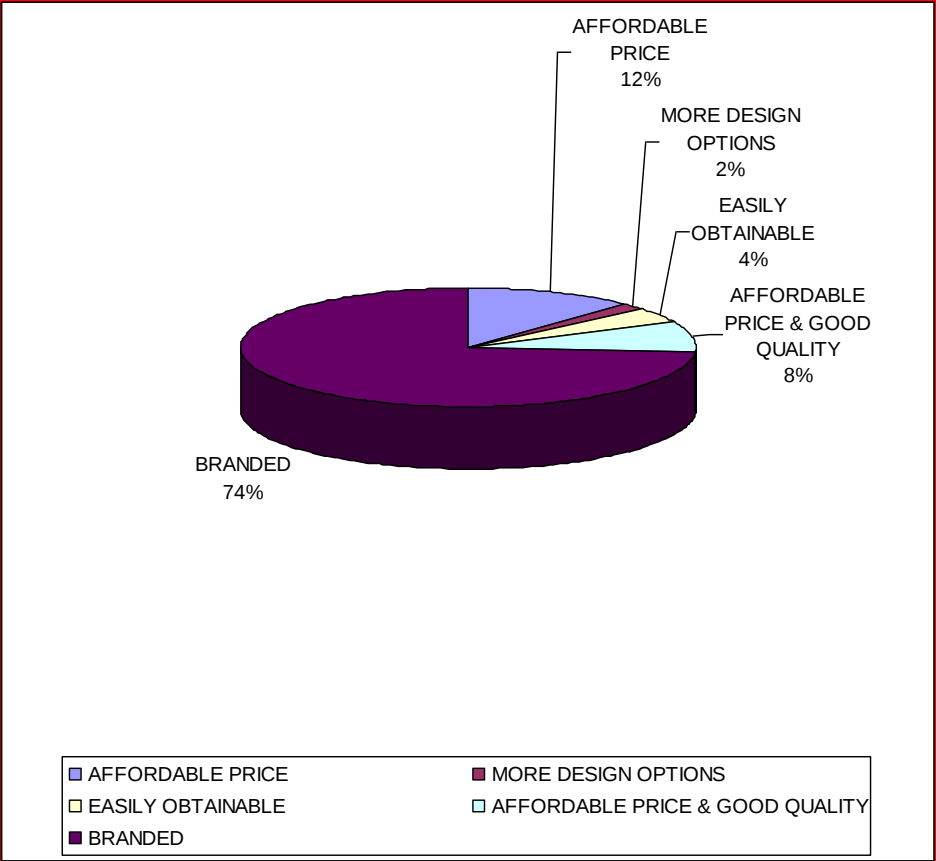
Must -ang	Week ender	Cucum -ber	Zero	Kids Studio	Teddy	Disney	Mustang Weekender Cucumber	Cucumber Weekender Teddy	Weekender Zero Disney	No	Didn't Know	Others
	2		2			1	1	1	1	12	1	29



Inferences : Others Rupa, VIP, Essa, Jockey, Euro, Lux, Zero, Cucumber, Child World, Childhood, Minimaes, Mushroom and Zapp.

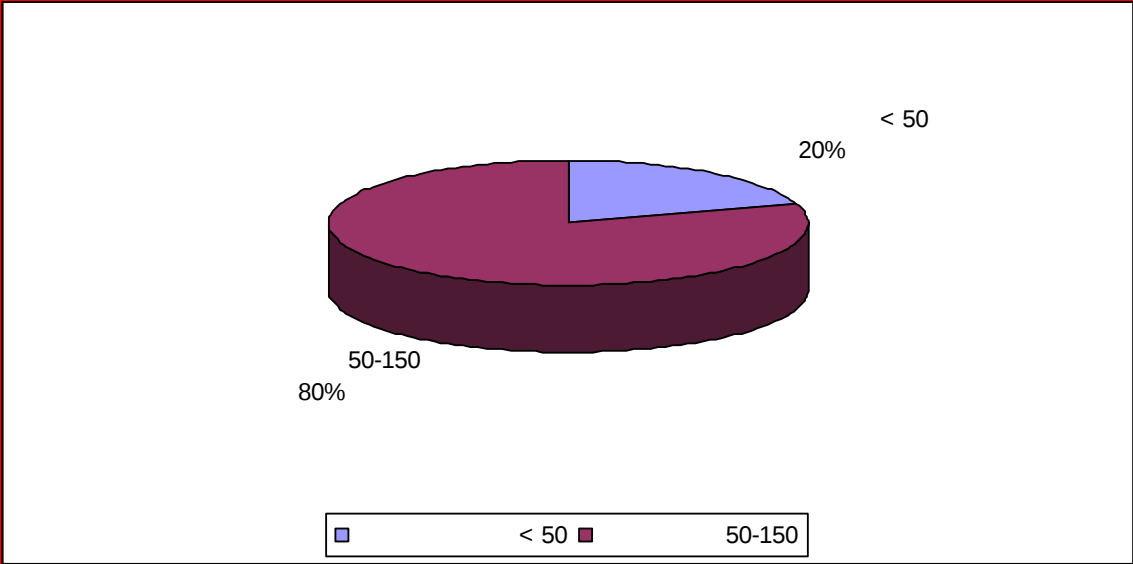
Analysis showing parents buying unbranded products

AFFORDABLE PRICE	MORE DESIGN OPTIONS	EASILY OBTAINABLE	AFFORDABLE PRICE & GOOD QUALITY	BRANDED
06	01	02	04	37



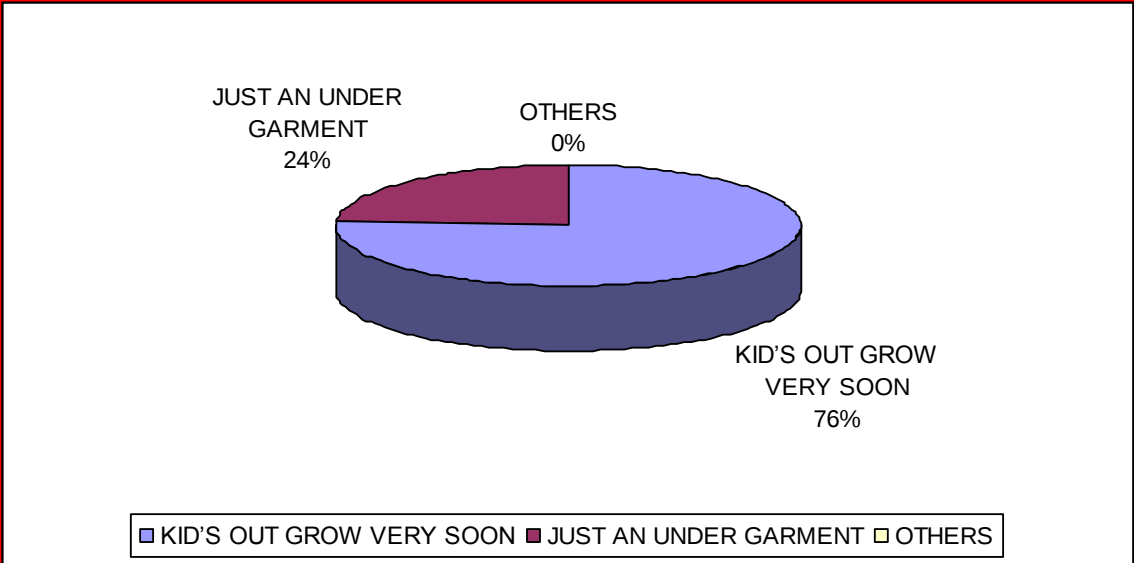
Range preferred for kids innerwear

< 50	50-150
10	40



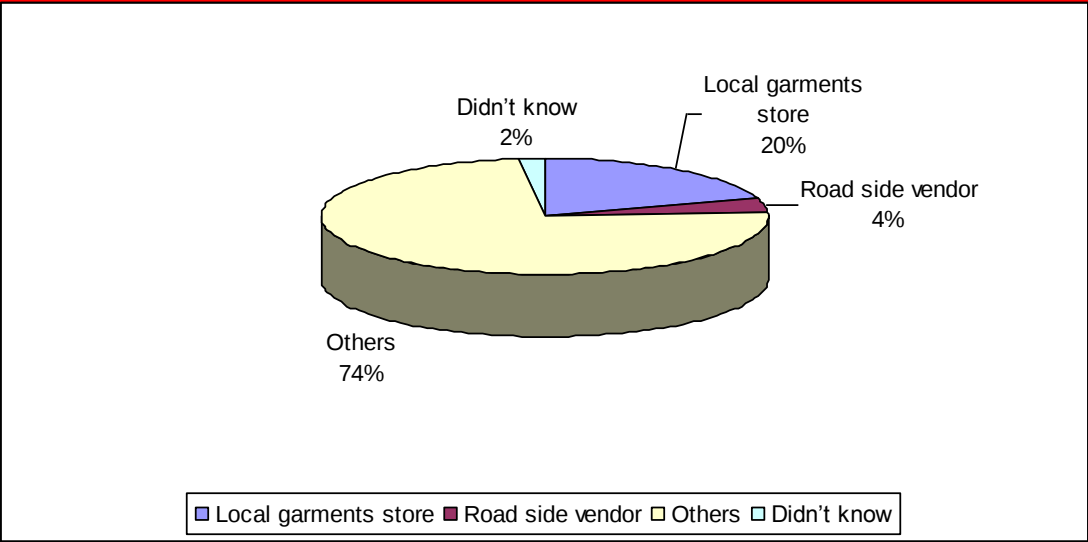
Analysis of end users for not going to high range products

KID'S OUT GROW VERY SOON	JUST AN UNDER GARMENT	OTHERS
38	12	0



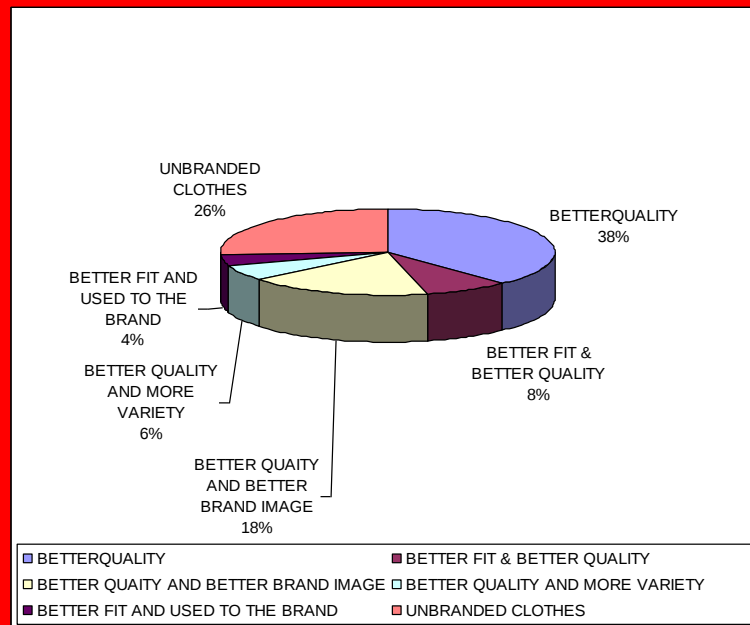
Places preferred for purchase of unbranded products

Local garments store	Road side vendor	Others	Didn't know
10	2	37	1



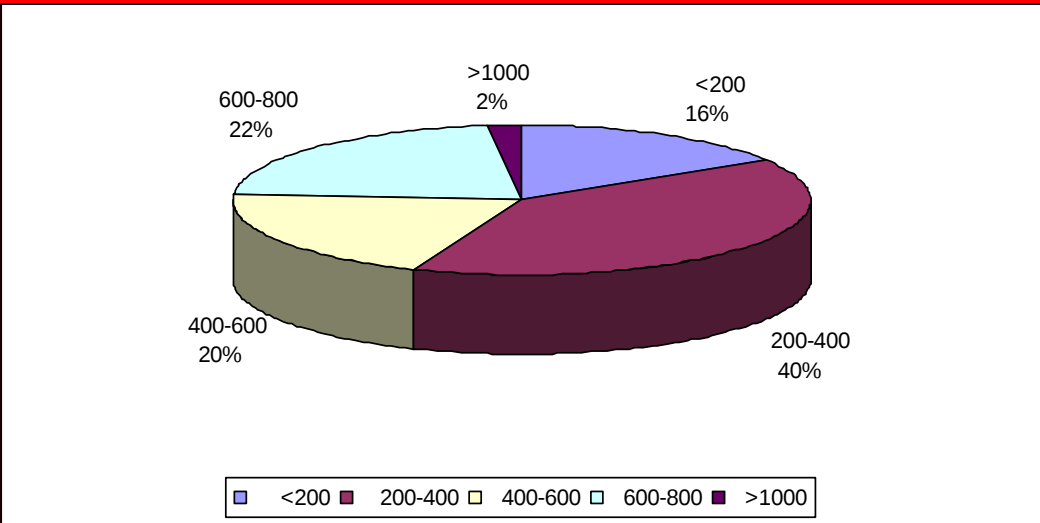
Analysis of the brands indicated

BETTERQUALITY	BETTER FIT & BETTER QUALITY	BETTER QUAITY AND BETTER BRAND IMAGE	BETTER QUALITY AND MORE VARIETY	BETTER FIT AND USED TO THE BRAND	UNBRANDED CLOTHES
19	04	09	03	02	13



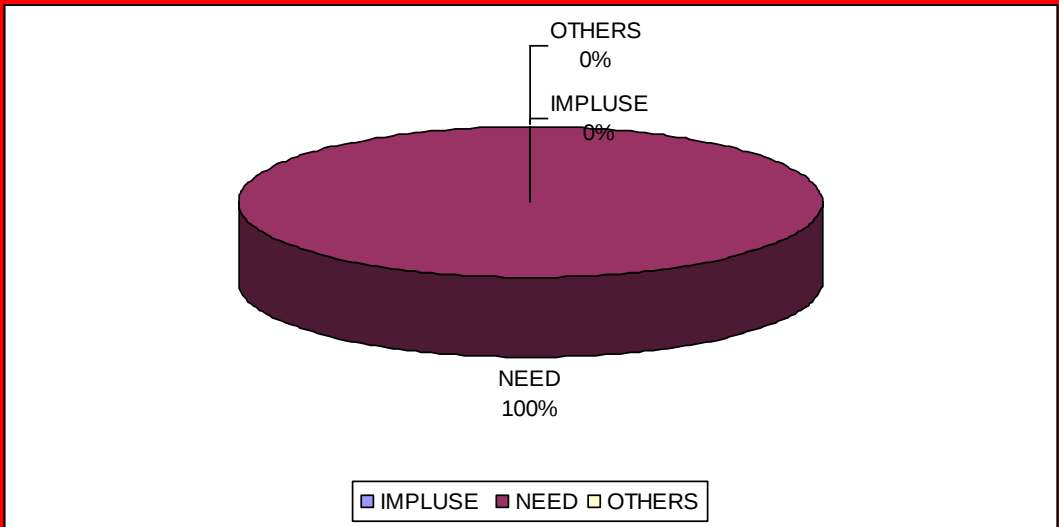
Average annual amount spend by parents on kids innerwear

<200	200-400	400-600	600-800	>1000
08	20	10	11	1



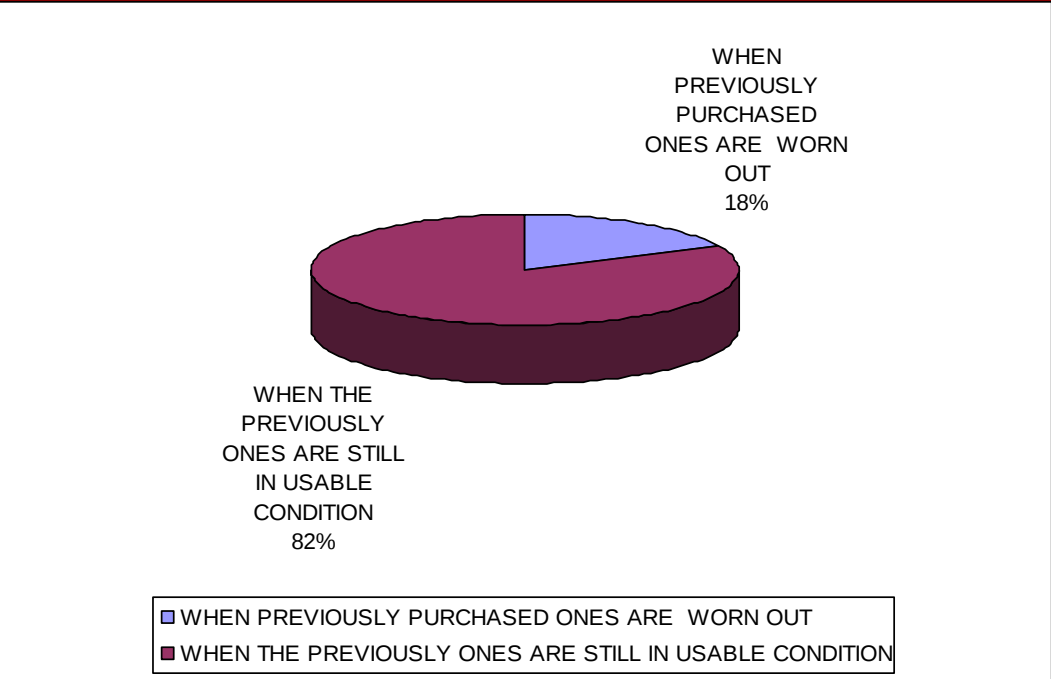
Factors that induces parents for kids innerwear purchase

IMPLUSE	NEED	OTHERS
0	50	0



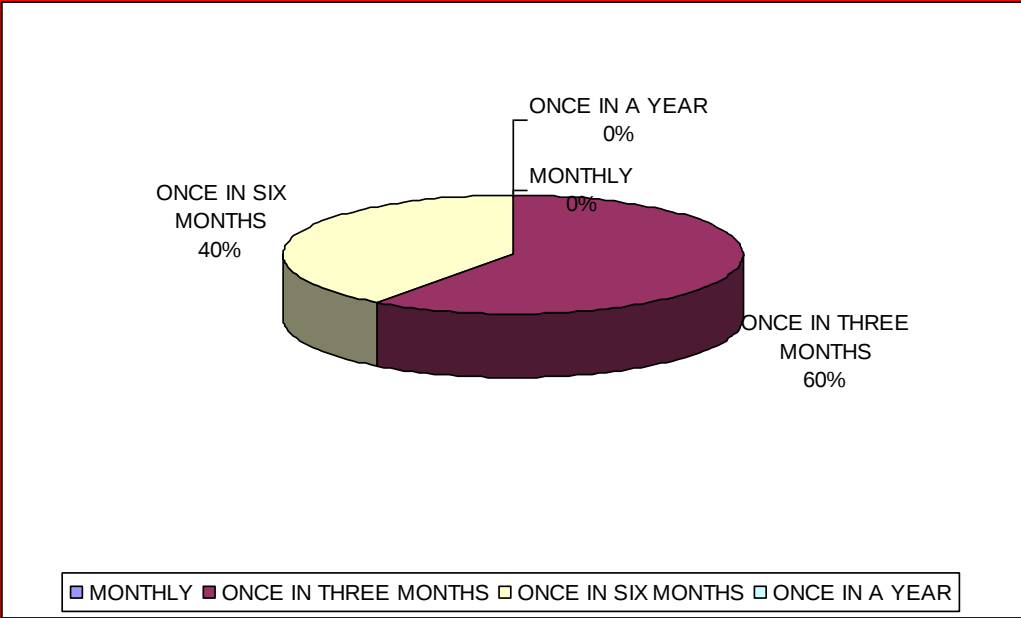
Analysis of the need for purchasing kids innerwear

WHEN PREVIOUSLY PURCHASED ONES ARE WORN OUT	WHEN THE PREVIOUSLY ONES ARE STILL IN USABLE CONDITION
09	41



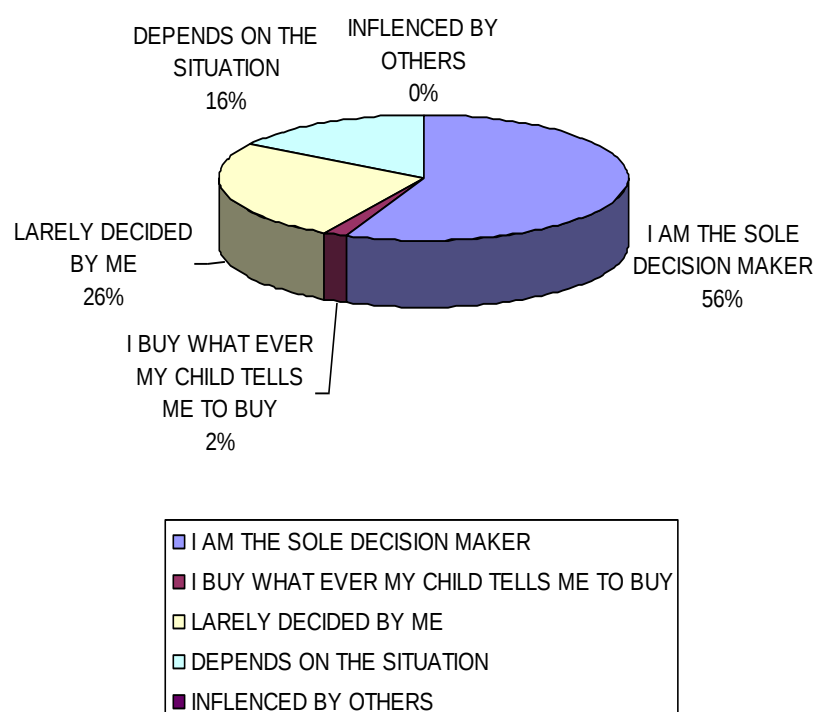
Analysis of the frequency of purchase

MONTHLY	ONCE IN THREE MONTHS	ONCE IN SIX MONTHS	ONCE IN A YEAR
0	30	20	0



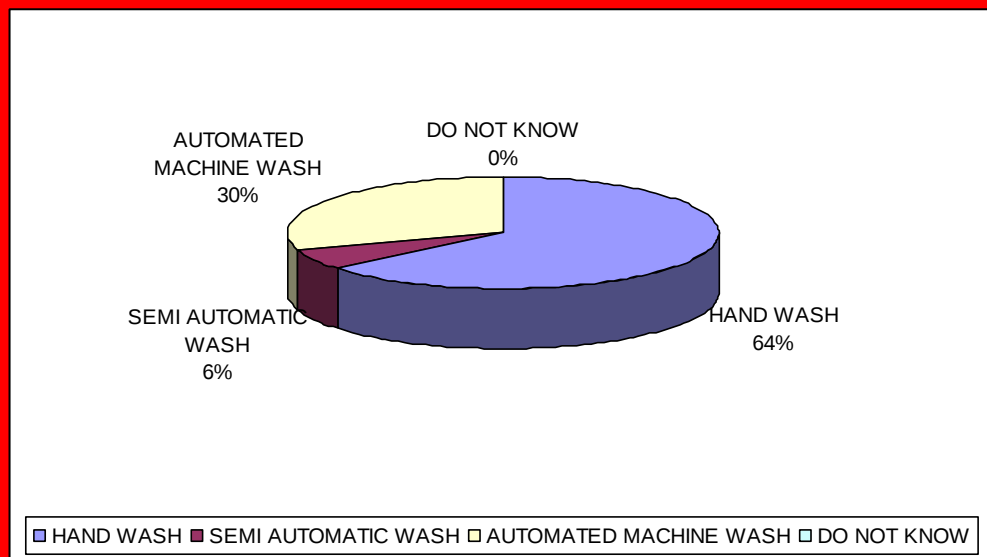
Analysis of the decision taken while buying kids innerwear

I AM THE SOLE DECISION MAKER	I BUY WHAT EVER MY CHILD TELLS ME TO BUY	LARELY DECIDED BY ME	DEPENDS ON THE SITUATION	INFLENCED BY OTHERS
28	01	13	08	00



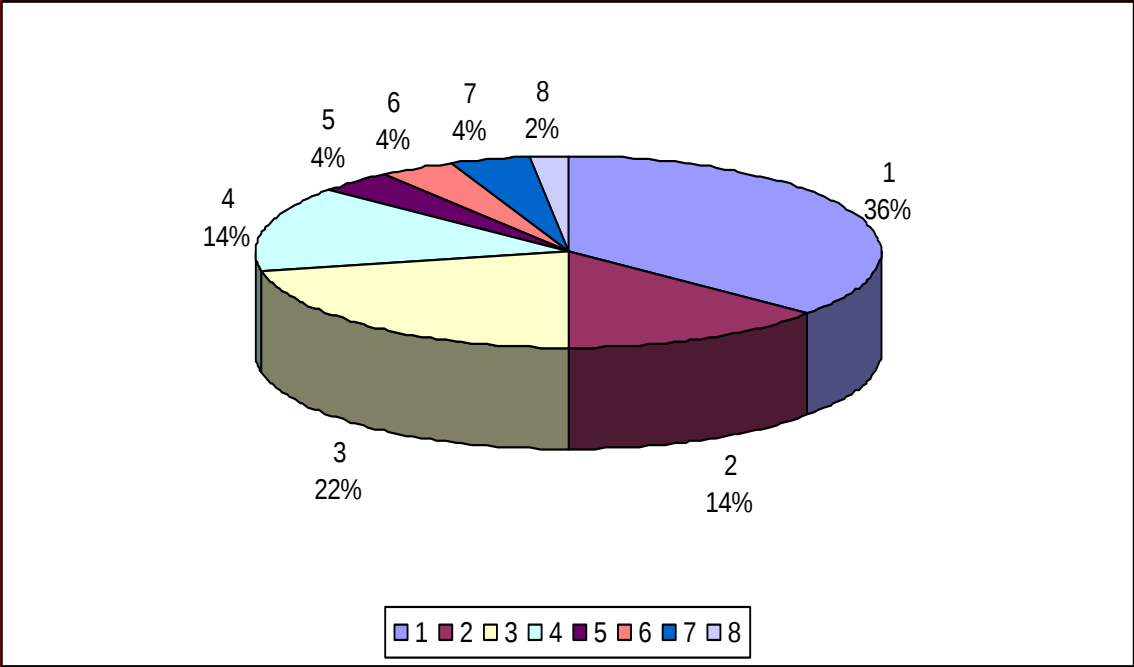
Washing of the childs innerwear

HAND WASH	SEMI AUTOMATIC WASH	AUTOMATED MACHINE WASH	DO NOT KNOW
32	03	15	00



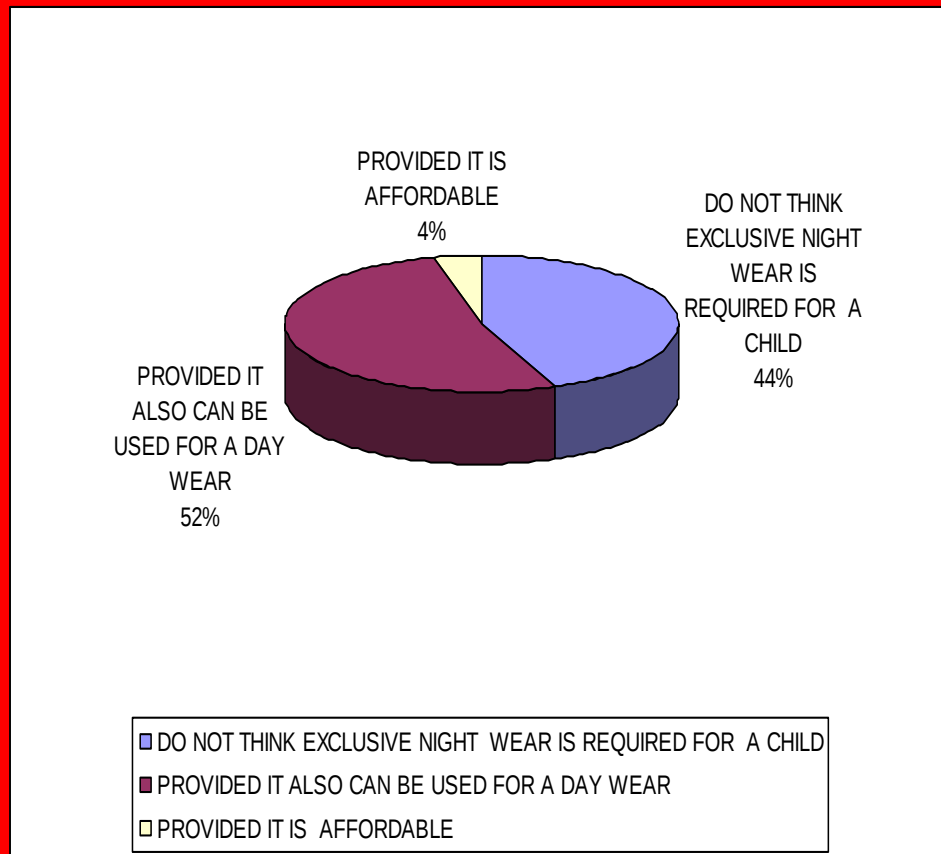
Analysis of the availability of high quality branded innerwear at reasonable price

HAPPY WITH THE EXISTING BRAND	BETTER QUALITY	BETER QUALITY AND COMFORT	PRODUCT IS ON PAR WITH THE PREVIOUS ONES	QUALITY AND UNIQUENESS	MORE VARIETY AND BETTER QUALITY	UNBRANDED ARE OK FOR ME	DO NOT THINK CHILD NEEDS BRANDED CLOTHS
18	07	11	07	02	02	02	01



Analysis of specially designed night wear

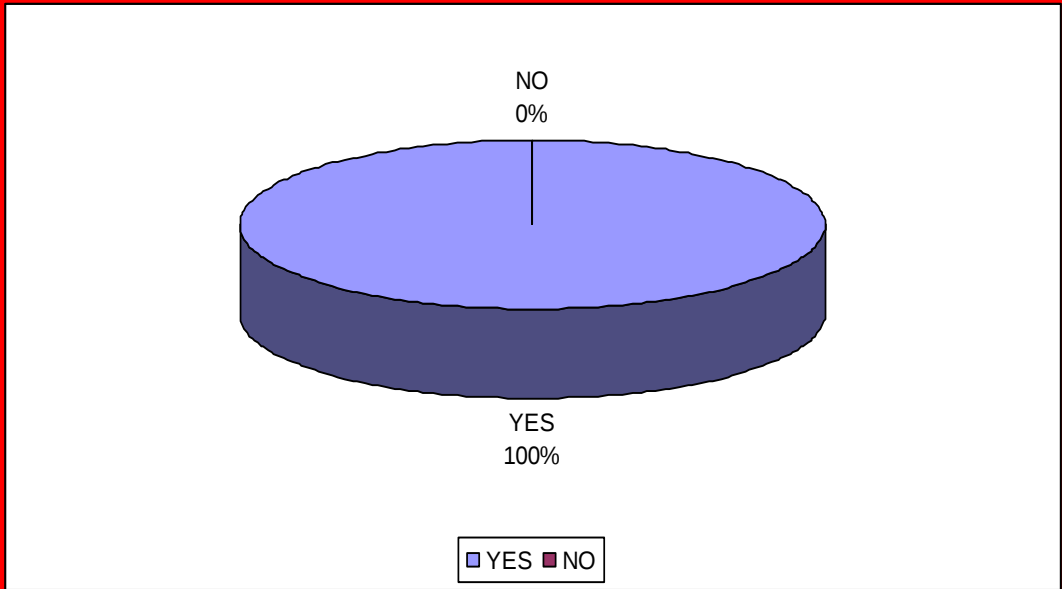
DO NOT THINK EXCLUSIVE NIGHT WEAR IS REQUIRED FOR A CHILD	PROVIDED IT ALSO CAN BE USED FOR A DAY WEAR	PROVIDED IT IS AFFORDABLE
22	26	02



Response of the retailers:

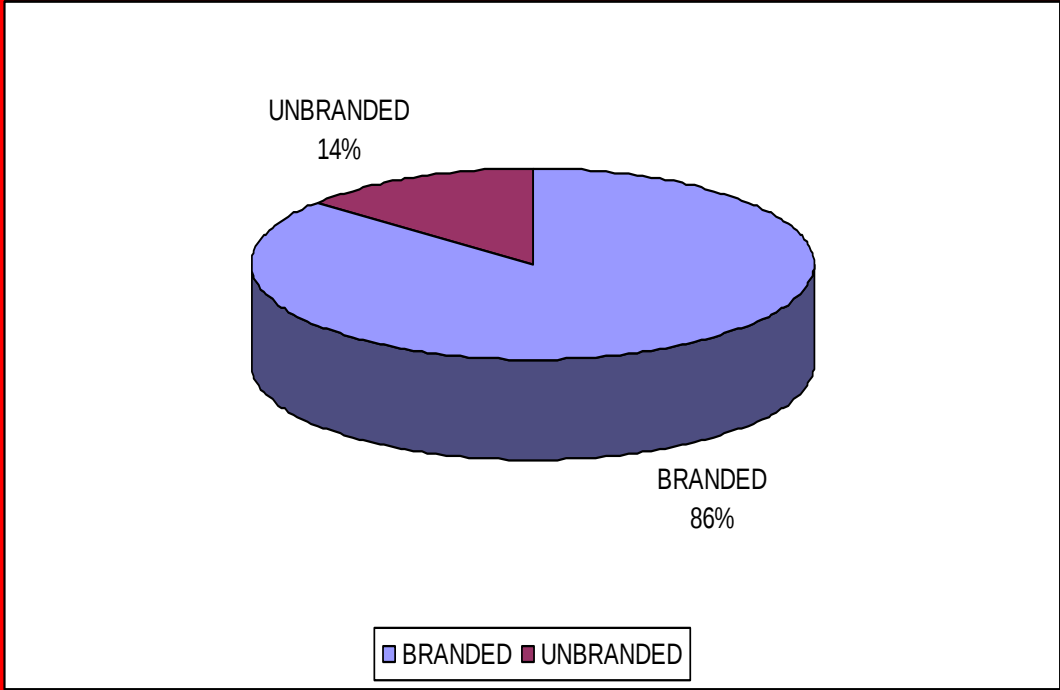
Retailers selling kids innerwear

YES	NO
50	00



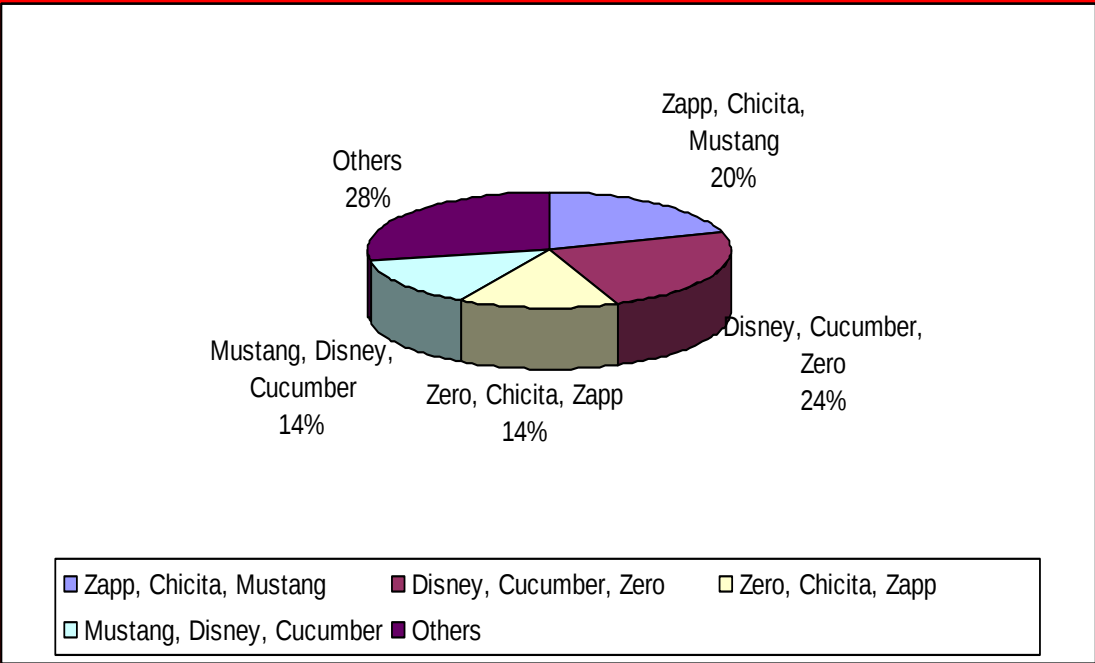
Retailers dealing with branded and unbranded goods in kids innerwear

BRANDED	UNBRANDED
43	07



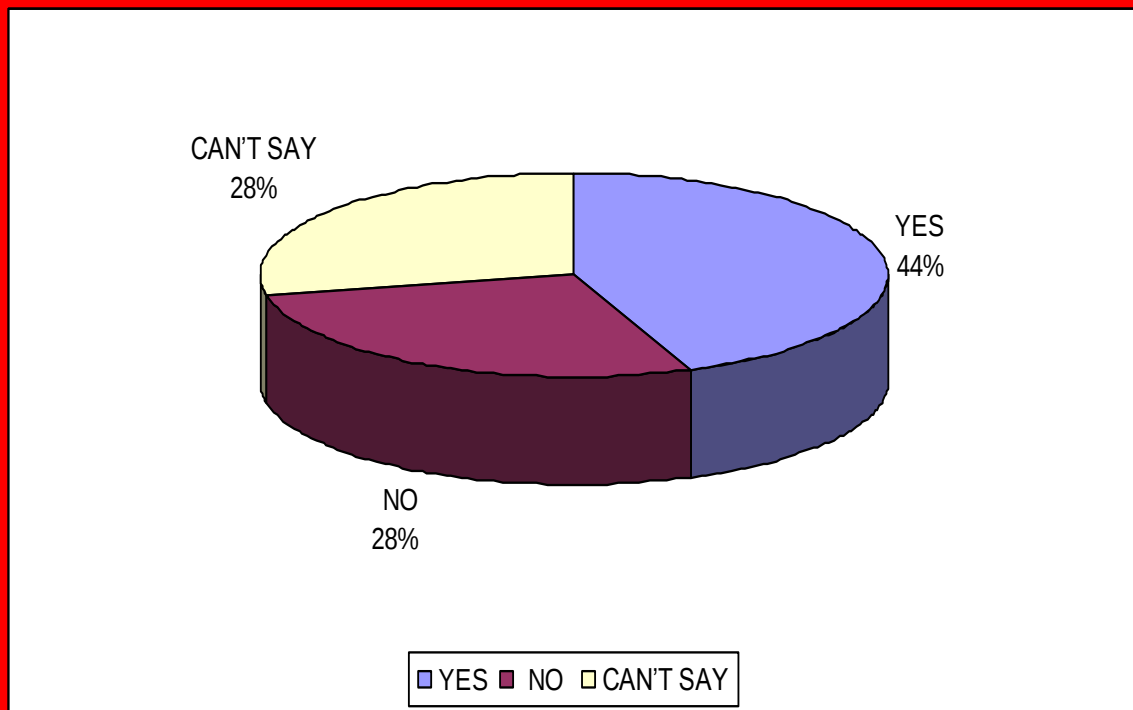
Different brands that retailers deal with

Zap, Chicita, Mustang	Disney, Cucumber Zero	Zero, Chicita, Zapp	Mustang, Disey, Cucumber	Others
10	12	7	7	14



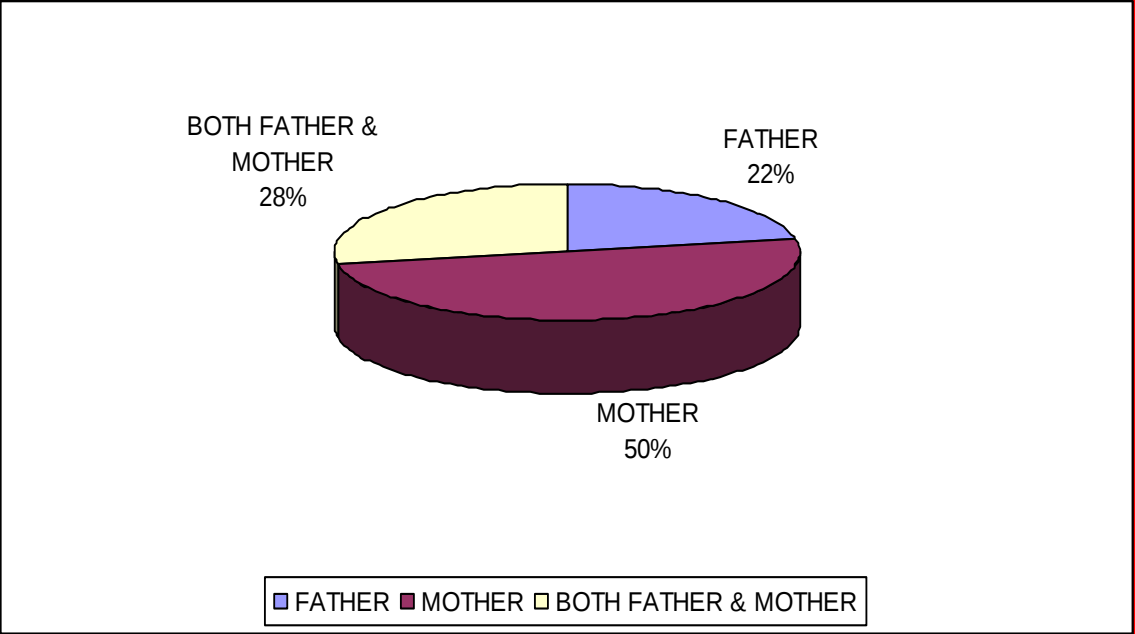
Observation of an upward trend in market

YES	NO	CAN'T SAY
22	14	14



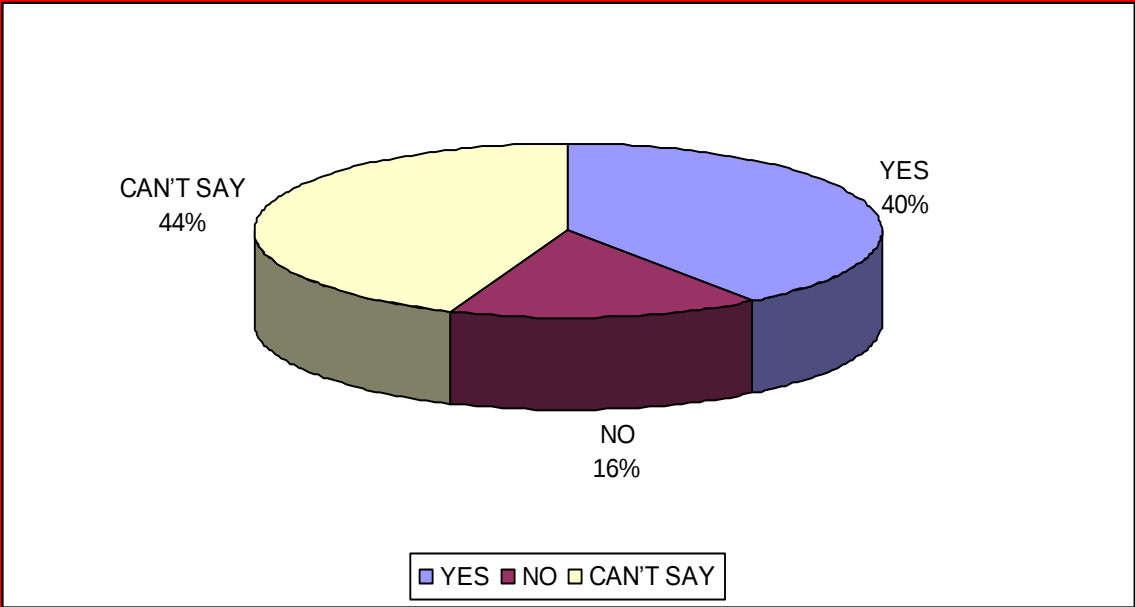
Analysis of customers coming for kids innerwear purchase

FATHER	MOTHER	BOTH FATHER & MOTHER
11	25	14



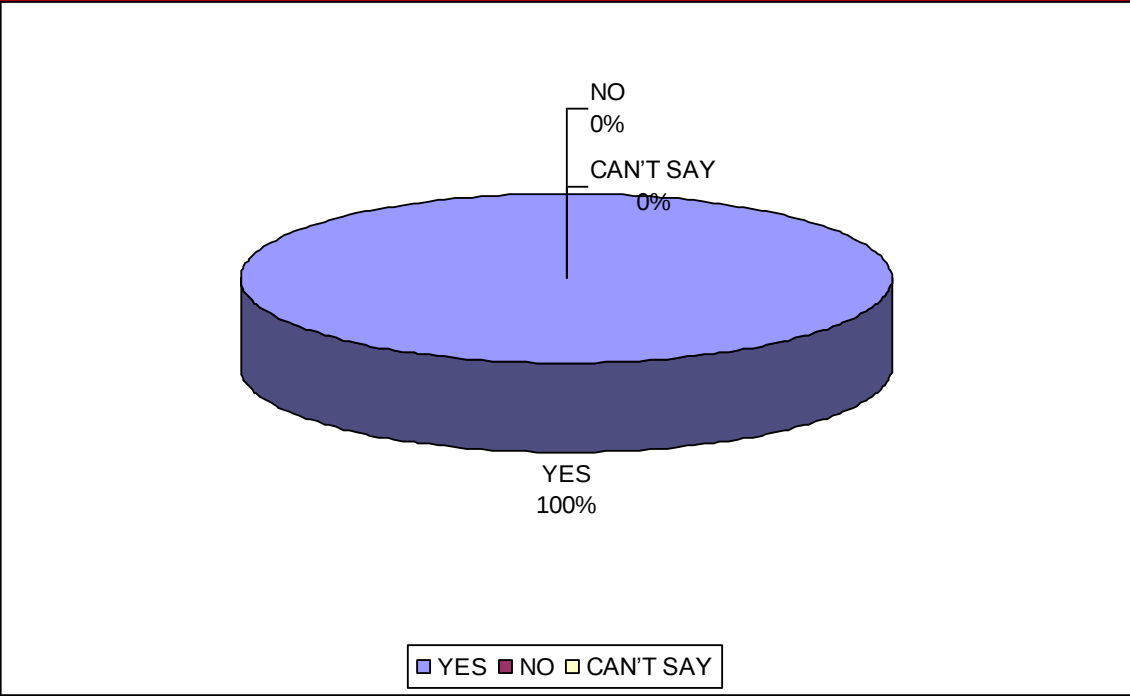
Analysis showing the influence of kids in innerwear purchase

YES	NO	CAN'T SAY
20	08	22



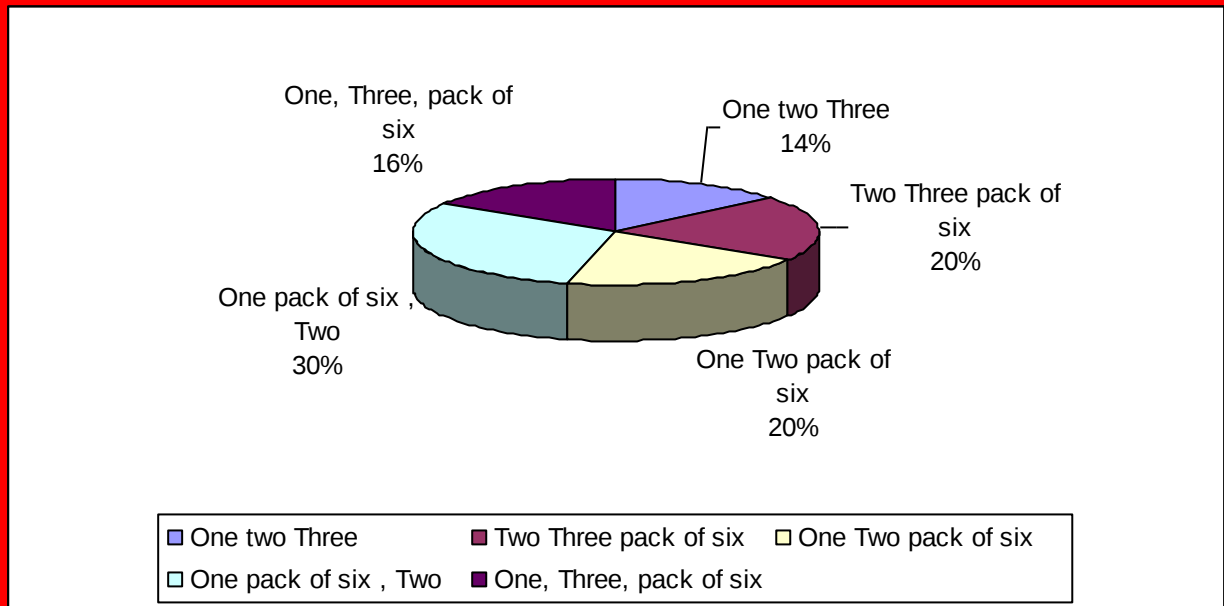
Analysis of specific patterns/colours of kids innerwear

YES	NO	CAN'T SAY
50	00	00



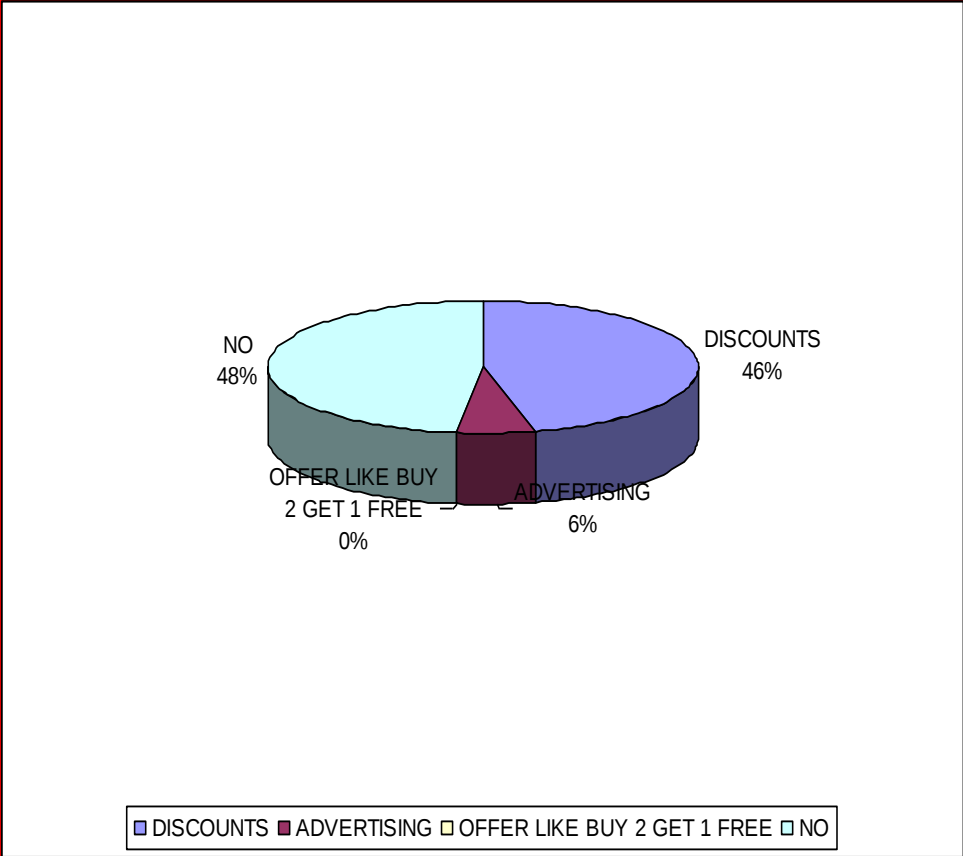
Retailers normally deal with packaging of kids innerwear

One two Three	Two Three pack of six	One Two pack of six	One pack of six , Two	One, Three, pack of six
7	10	10	15	8



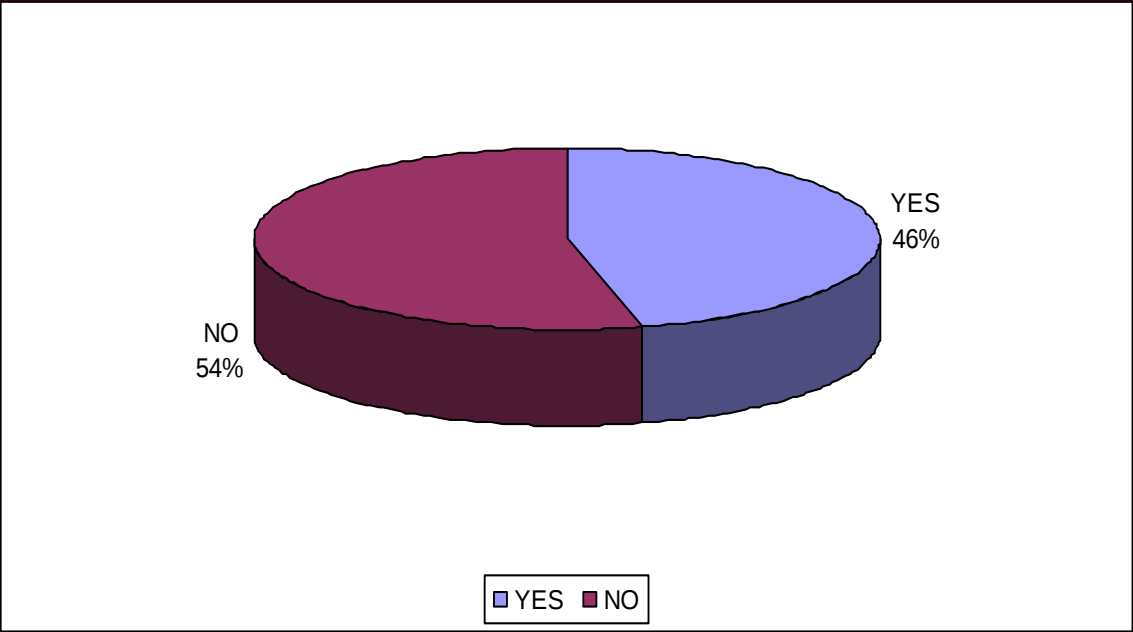
Retailers taking special efforts to increase the sale of kids innerwear

DISCOUNTS	ADVERTISING	OFFER LIKE BUY 2 GET 1 FREE	NO
23	03	0	24



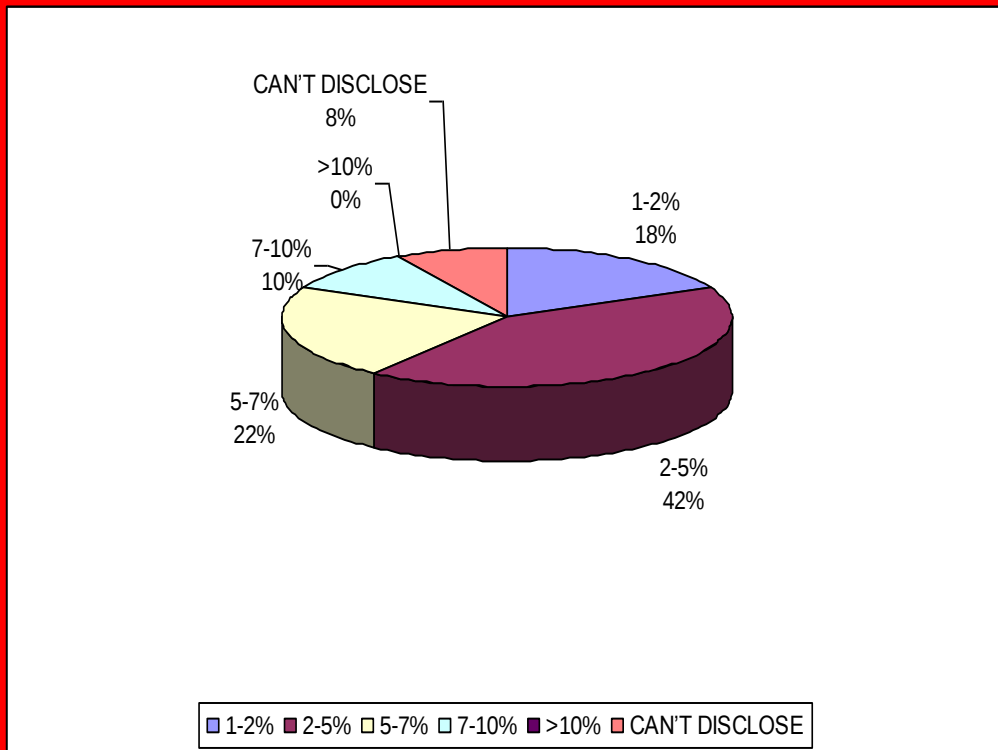
Analysis showing retailers giving any discounts on kids innerwear

YES	NO
23	27



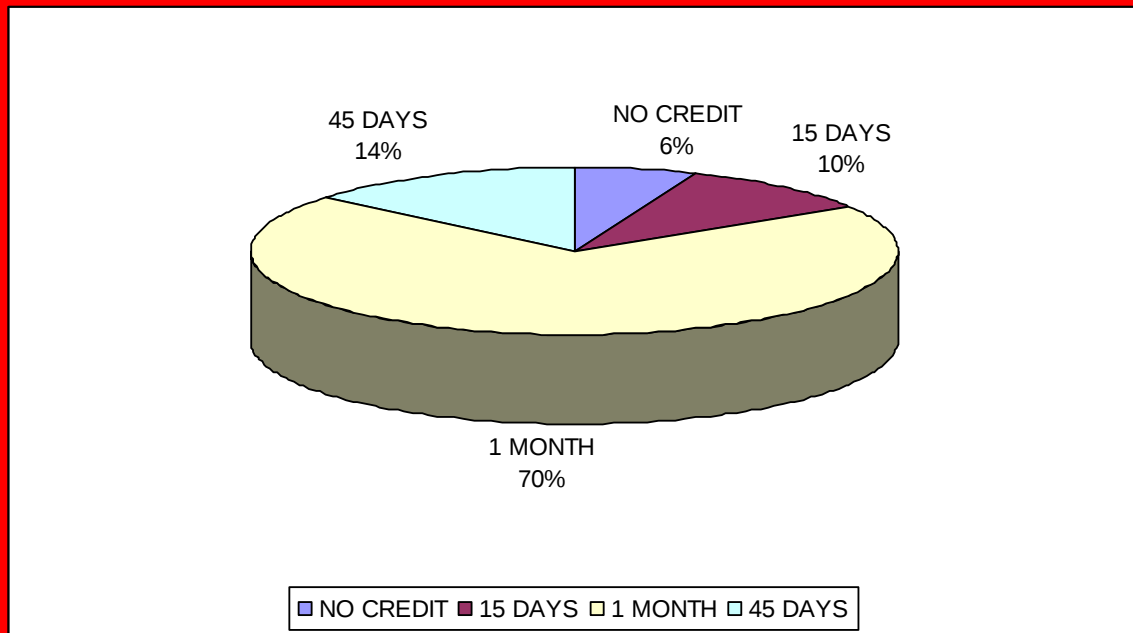
Analysis showing the approximate percentage given on kids innerwear

1-2%	2-5%	5-7%	7-10%	>10%	CAN'T DISCLOSE
09	21	11	05	00	04



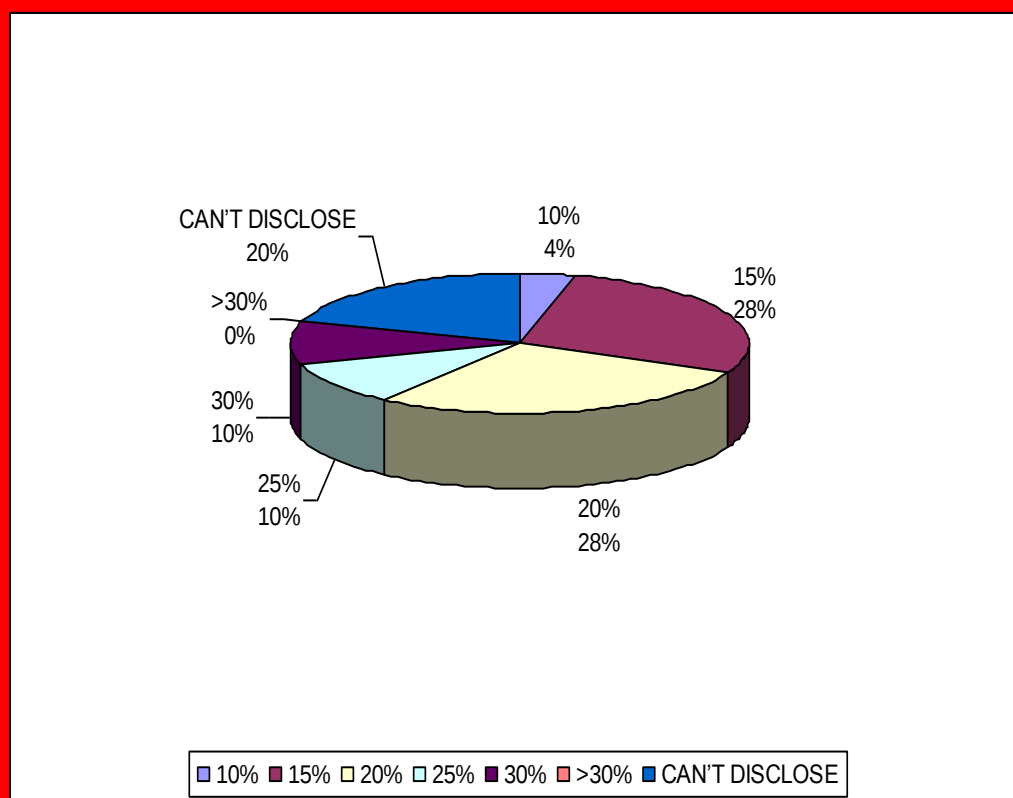
Credit period given to the retailers

NO CREDIT	15 DAYS	1 MONTH	45 DAYS
03	05	35	07



Approximate margin that retailers operate on

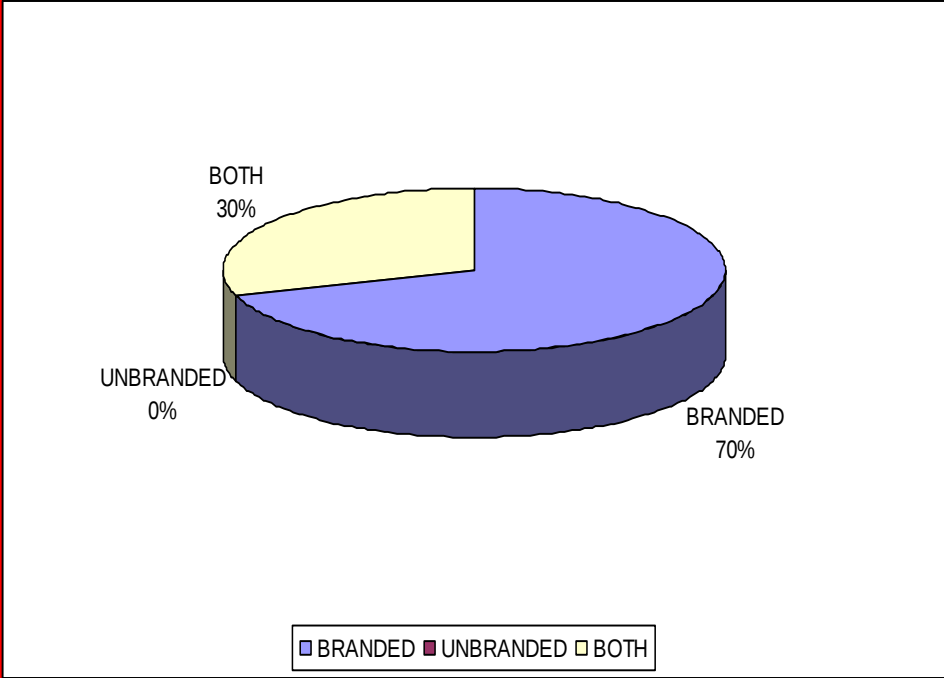
10%	15%	20%	25%	30%	>30%	CAN'T DISCLOSE
02	14	14	05	05	00	10



RESPONSE OF DISTRIBUTORS

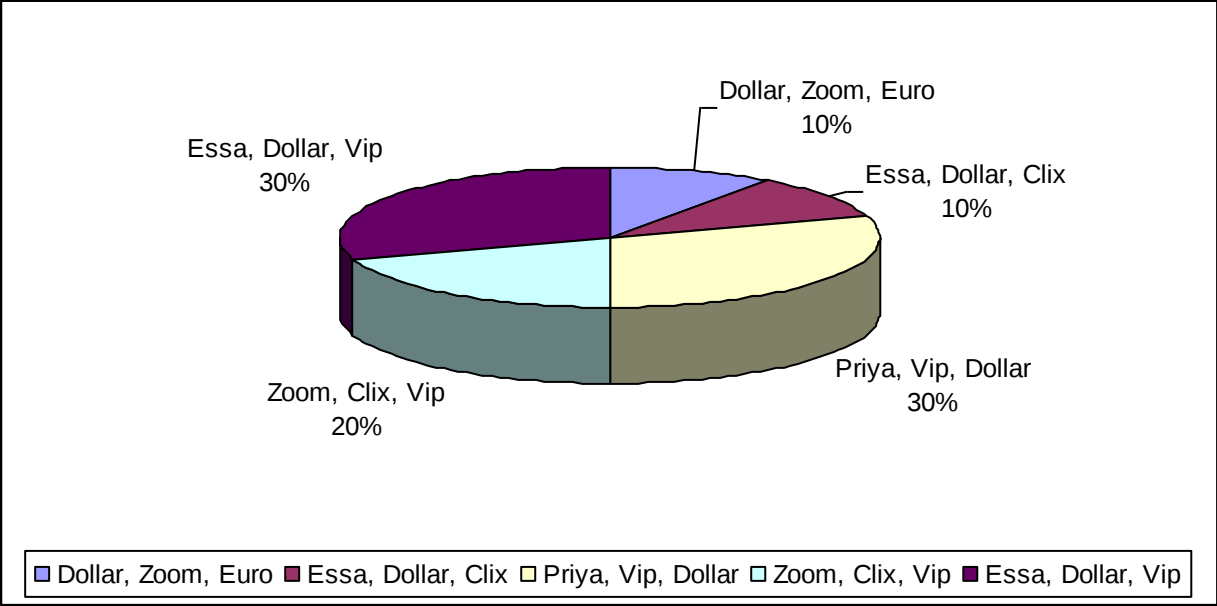
Goods that distributors are dealing with

BRANDED	UNBRANDED	BOTH
07	00	03



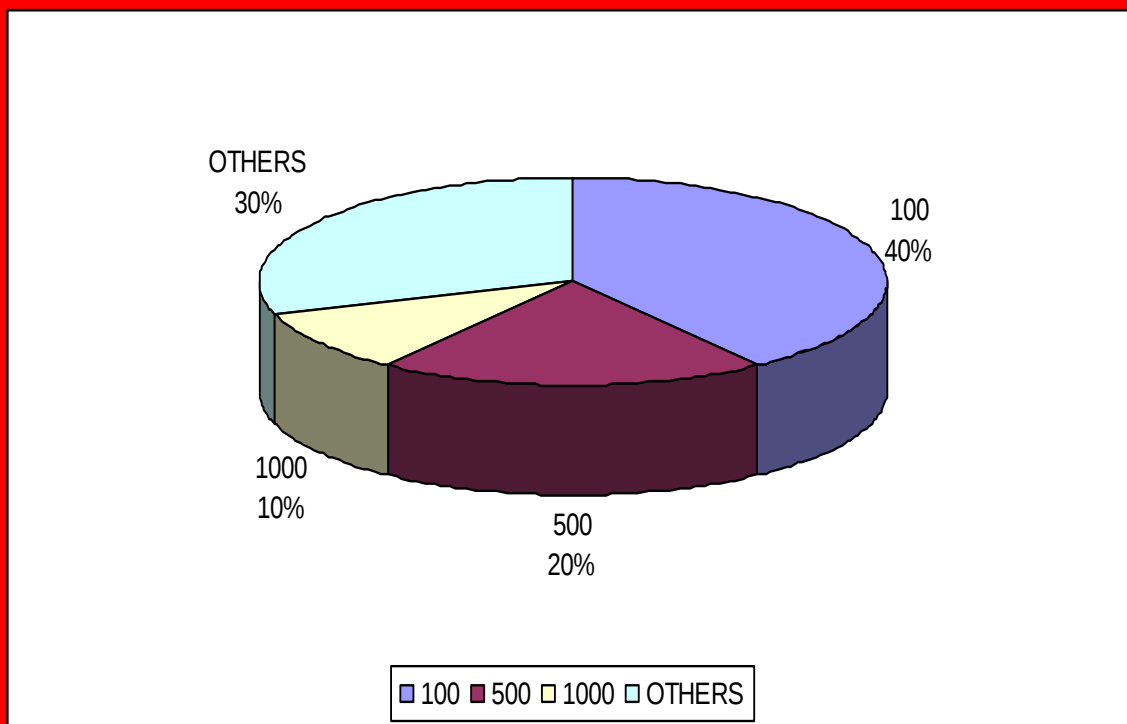
Distributors dealing with different kids innerwear brands

Dollar, Zoom, Euro	Essa, Dollar, Clix	Priya, Vip, Dollar	Zoom, Clix, Vip	Essa, Dollar, Vip
1	1	3	2	3



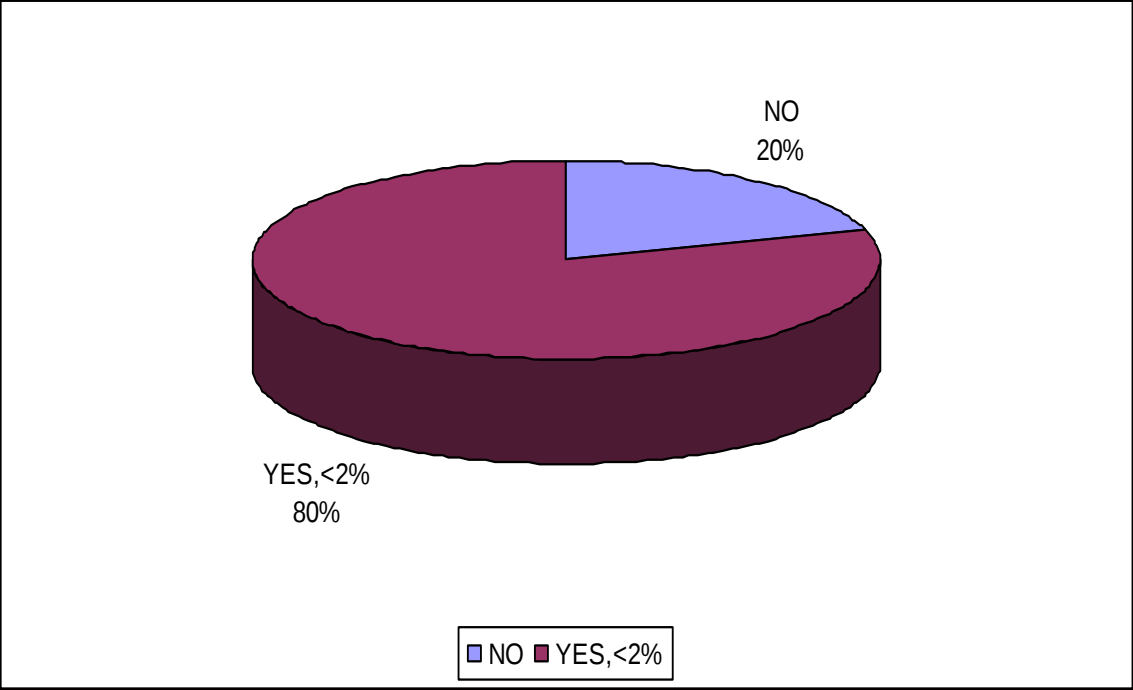
Analysis showing shipment size

100	500	1000	OTHERS
04	02	01	03



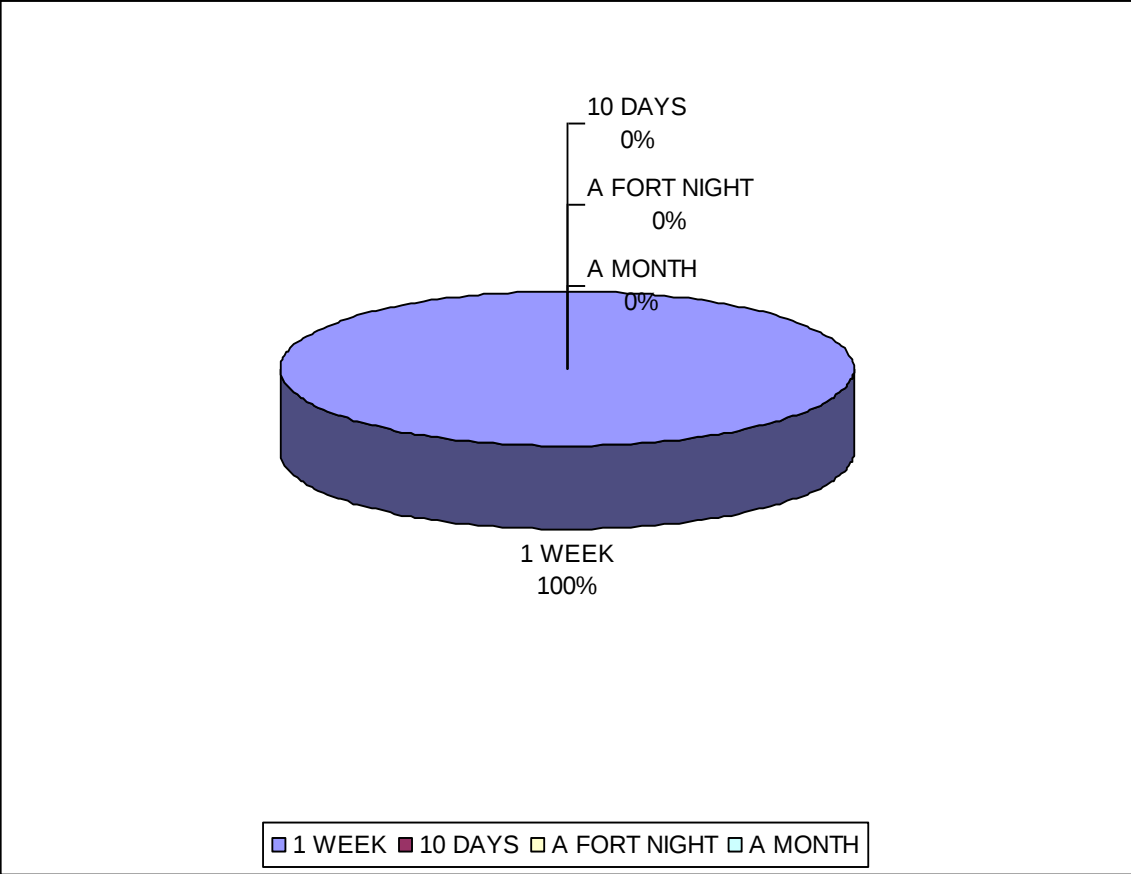
Analysis showing damage of goods in transit

NO	YES,<2%
02	08



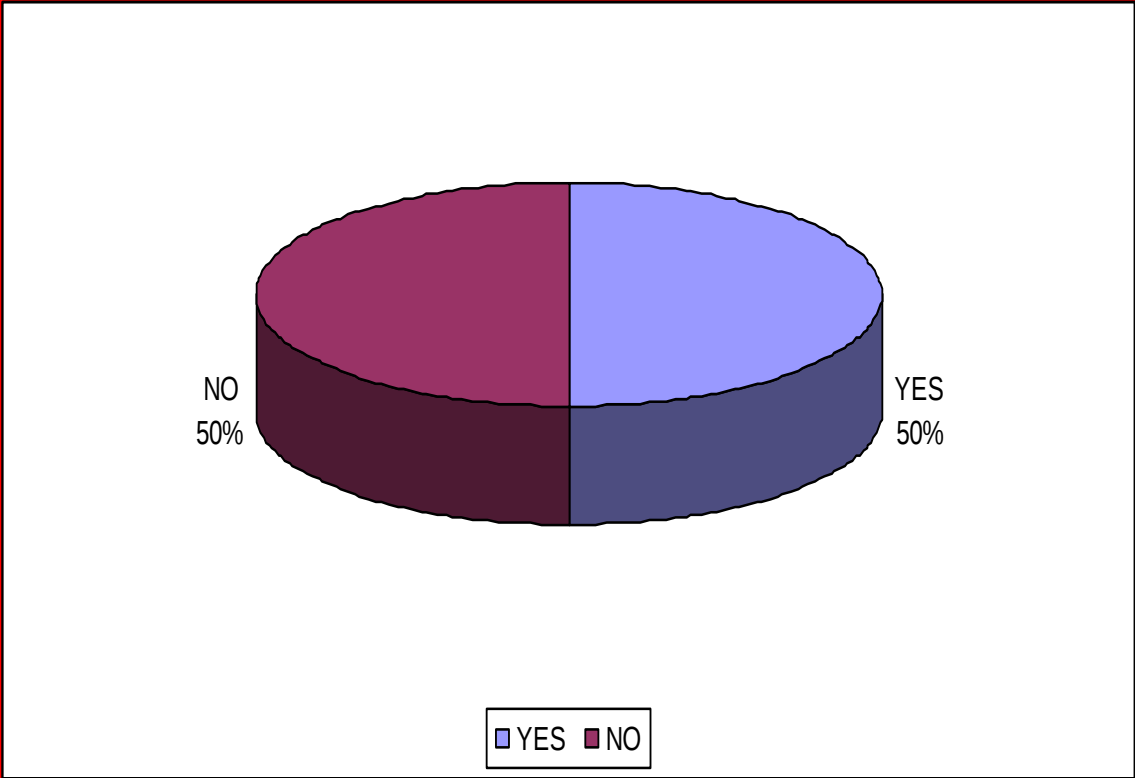
Analysis of placement of orders and time of goods reaching to distributor

1 WEEK	10 DAYS	A FORT NIGHT	A MONTH
10	00	00	00



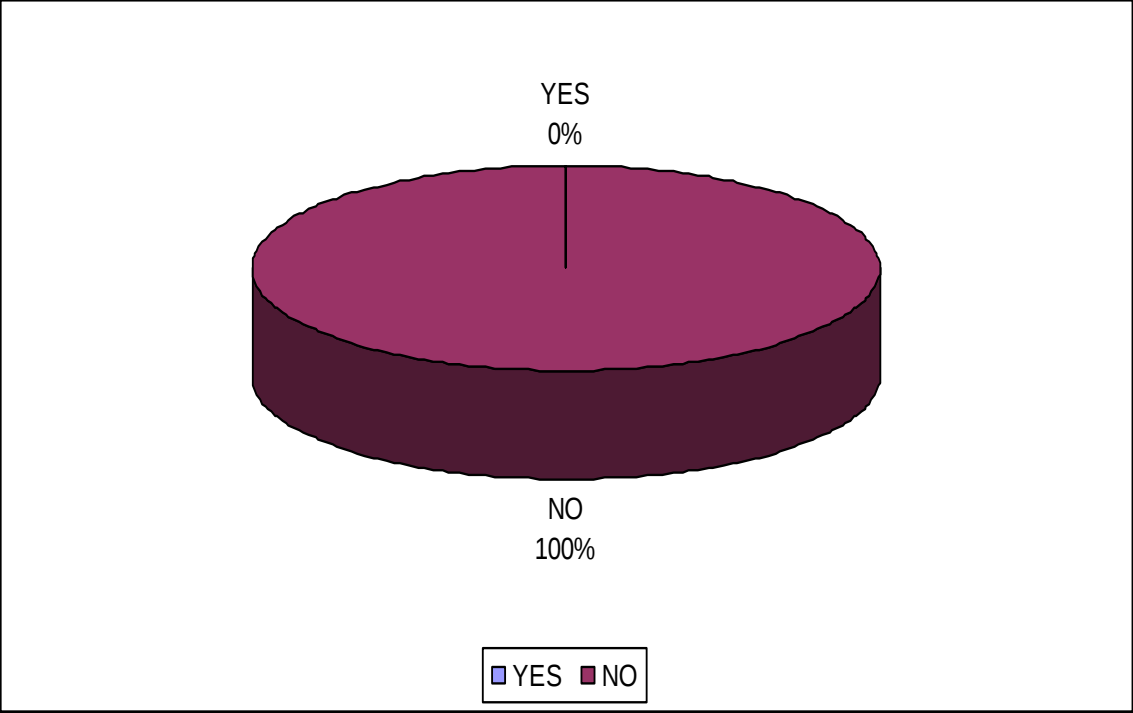
Analysis showing minimum order quantity

YES	NO
05	05



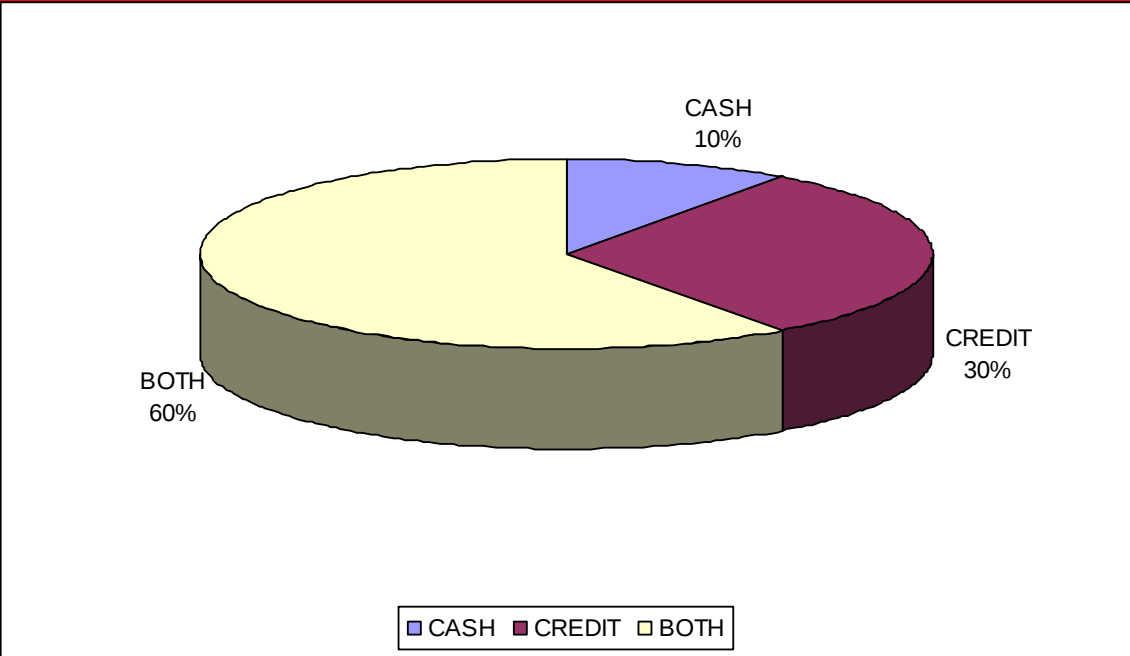
Analysis of the upper ceiling for the amount of stock

YES	NO
0	10



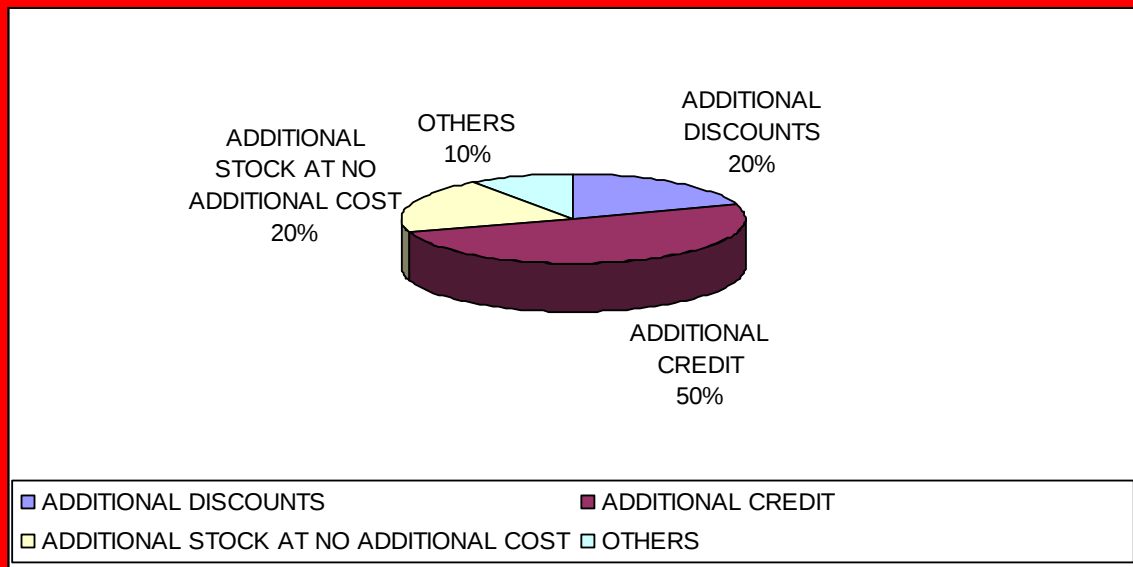
Analysis showing mode of payment

CASH	CREDIT	BOTH
01	03	06



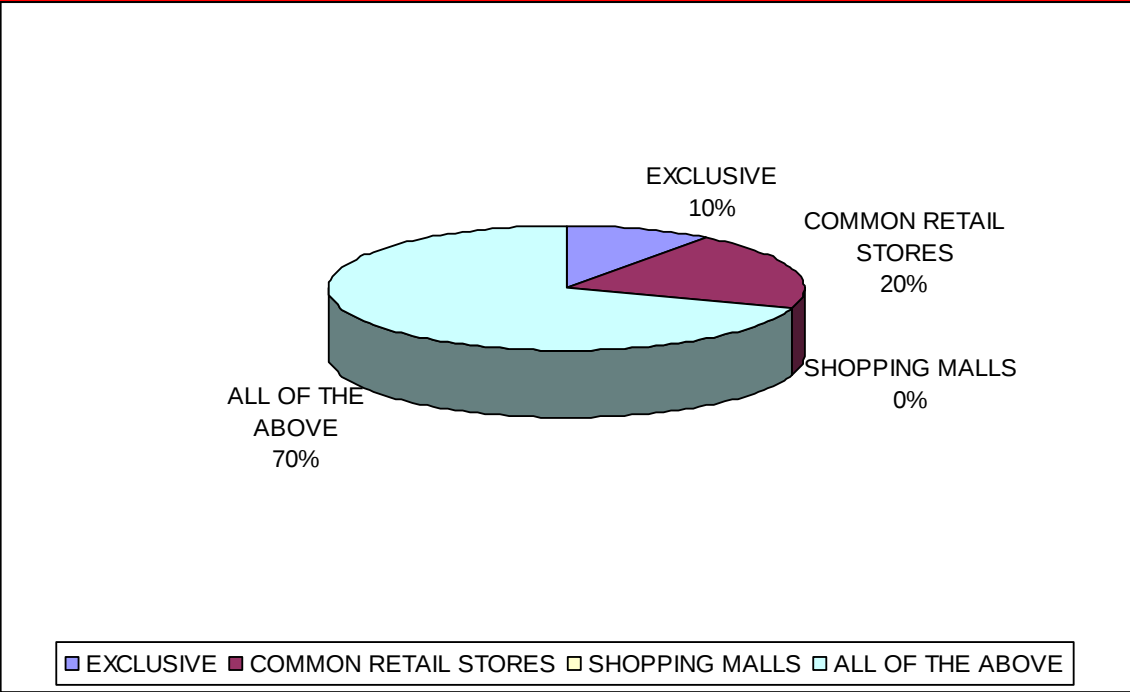
Privileges given to the distributor by manufacturer

ADDITIONAL DISCOUNTS	ADDITIONAL CREDIT	ADDITIONAL STOCK AT NO ADDITIONAL COST	OTHERS
02	05	02	01



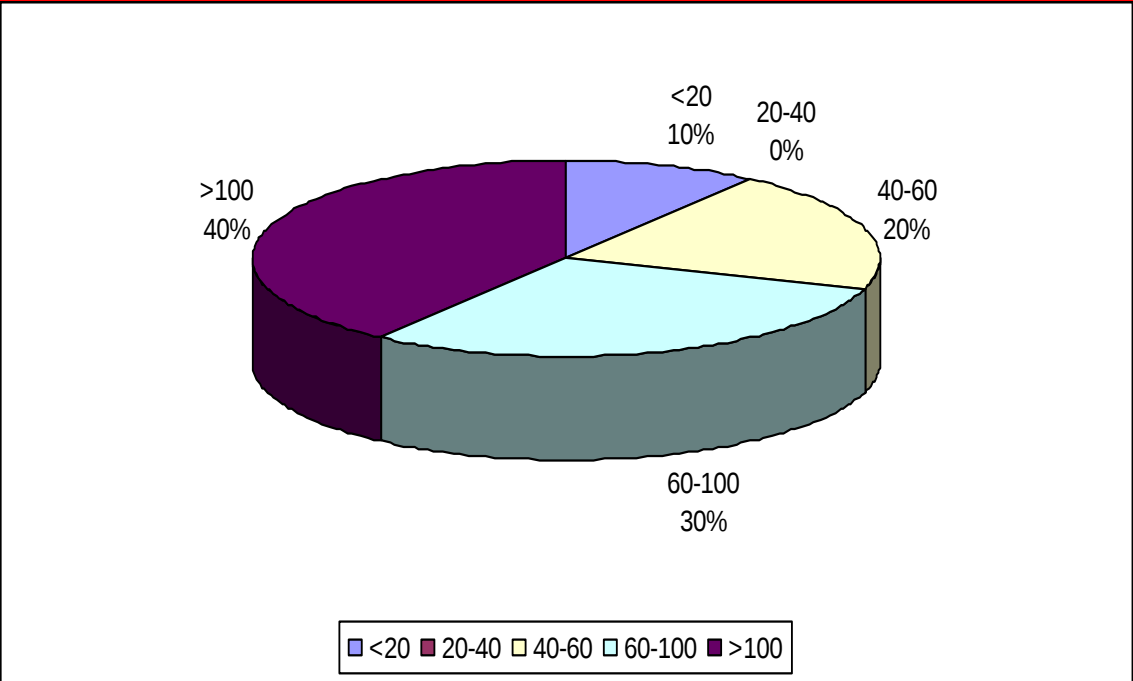
Analysis showing retail base of distributors

EXCLUSIVE	COMMON RETAIL STORES	SHOPPING MALLS	ALL OF THE ABOVE
01	02	0	07



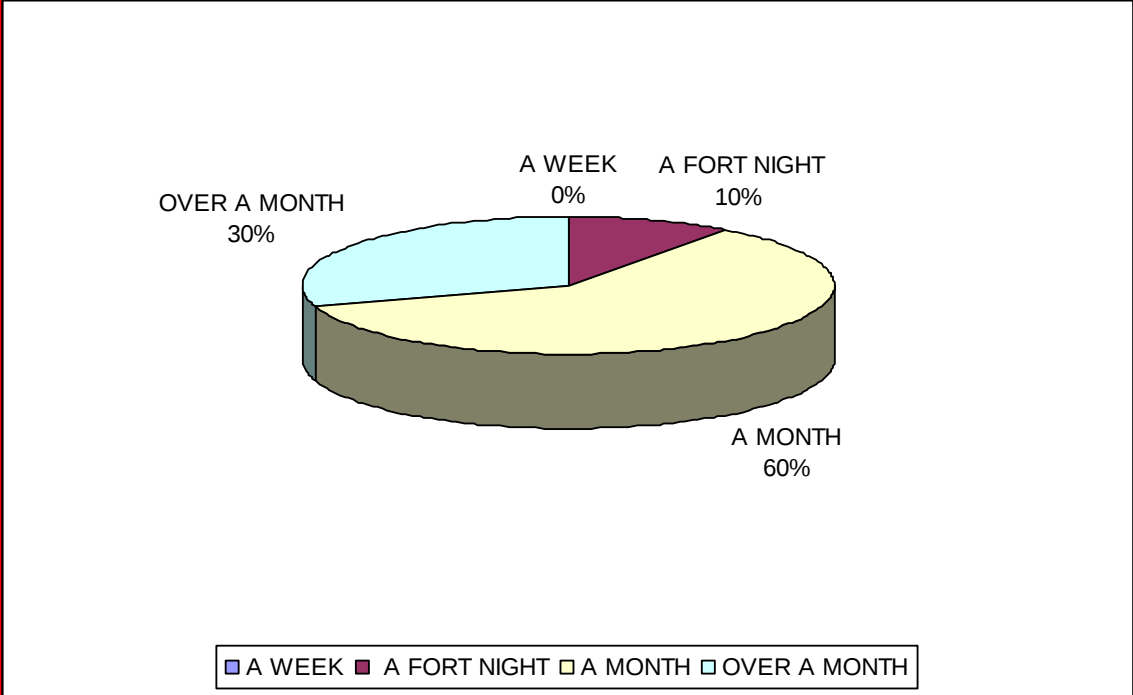
Number of retailers that distributors cater

<20	20-40	40-60	60-100	>100
01	0	02	03	04



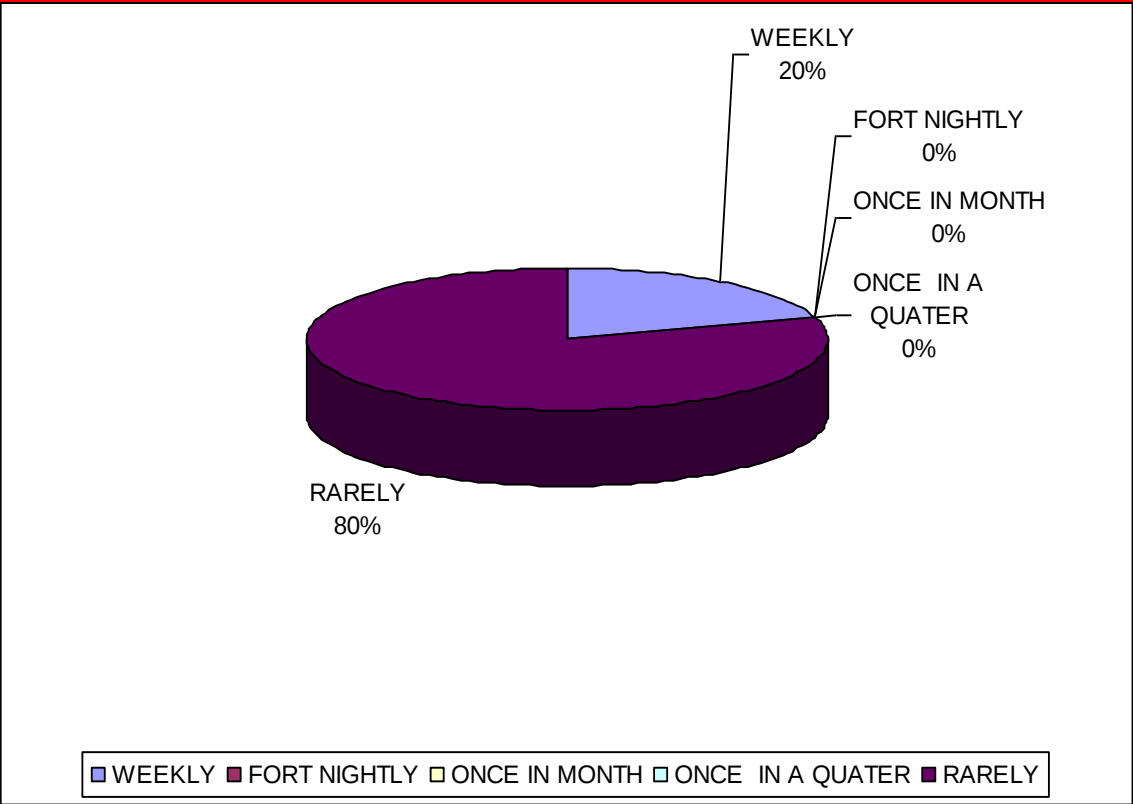
Analysis showing the credit period to retailers

A WEEK	A FORT NIGHT	A MONTH	OVER MONTH
00	01	06	03



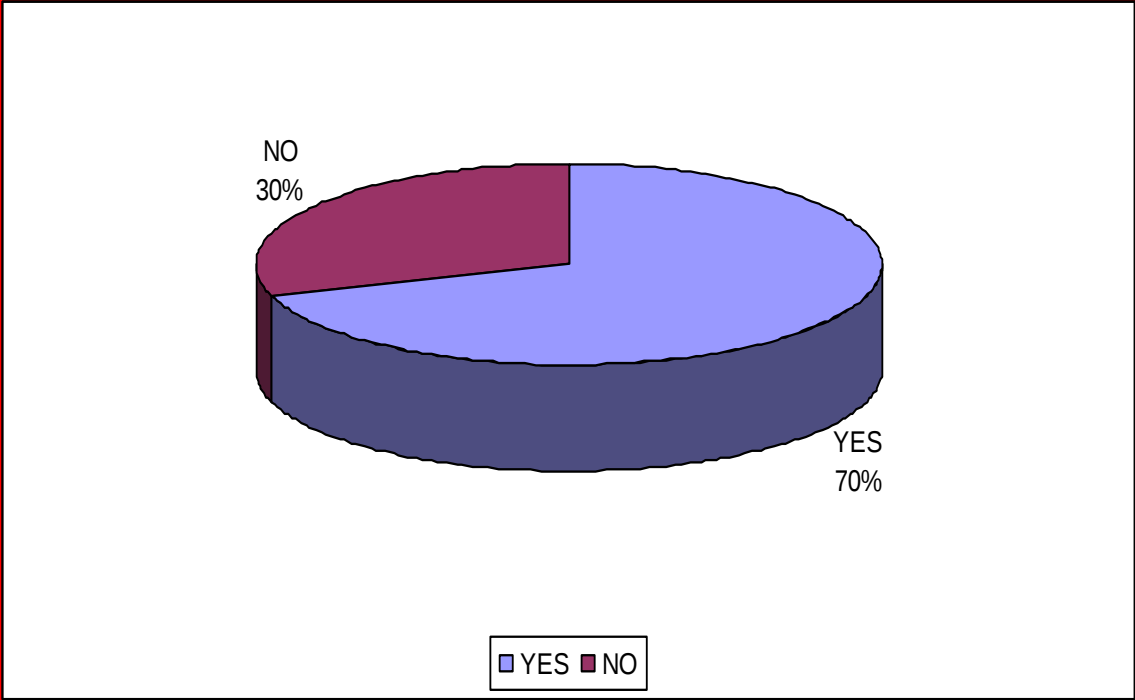
Analysis showing the emergency goods dispatch

WEEKLY	FORT NIGHTLY	ONCE IN MONTH	ONCE IN A QUATER	RARELY
02	00	00	00	08



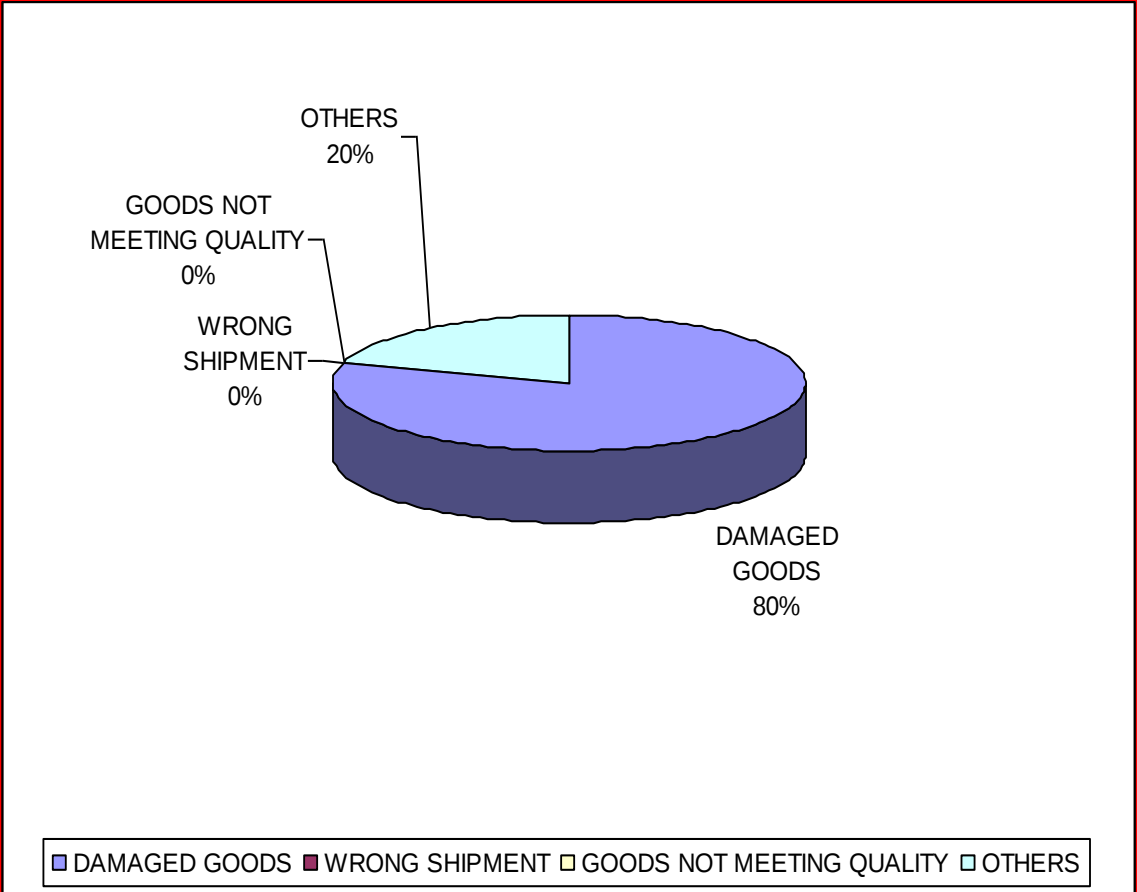
Analysis showing the goods returned by the retailers

YES	NO
07	03



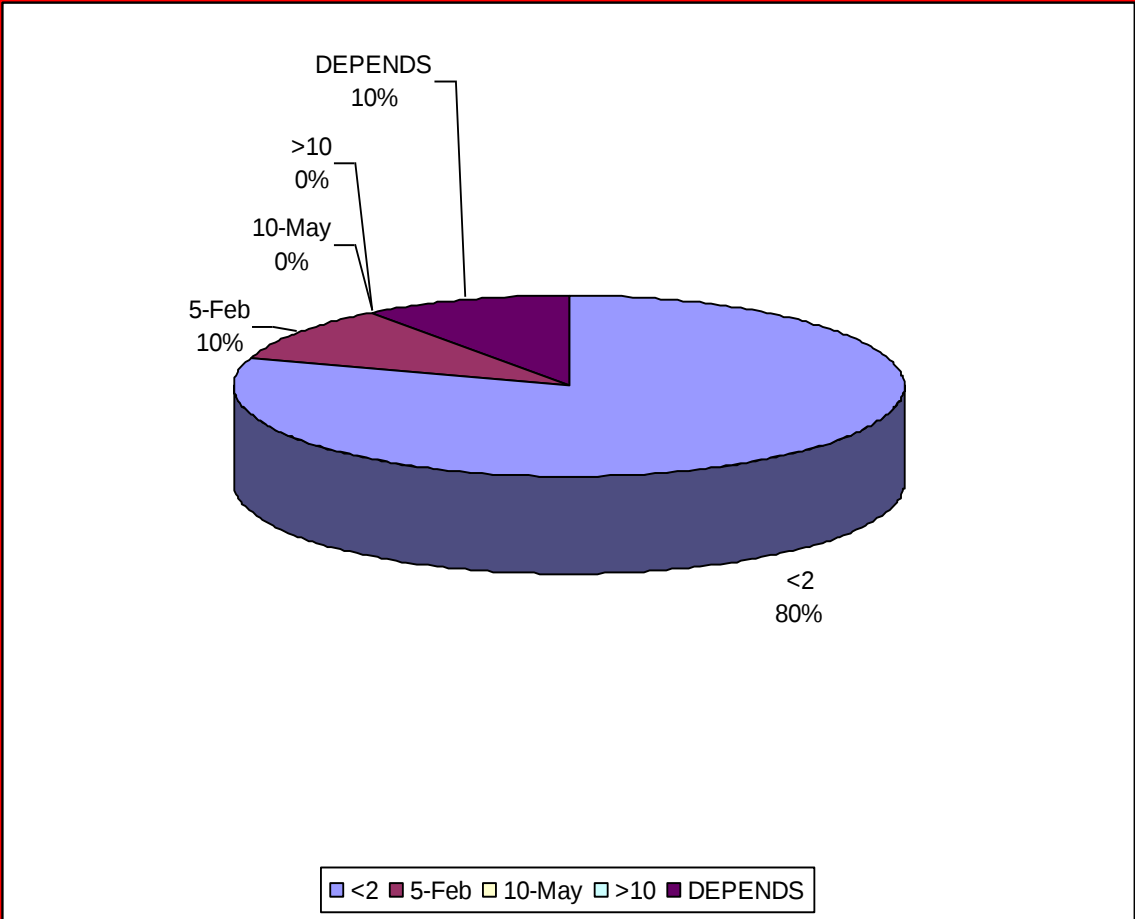
Reason for return of goods from the retailer

DAMAGED GOODS	WRONG SHIPMENT	GOODS NOT MEETING QUALITY	OTHERS
08	00	00	02



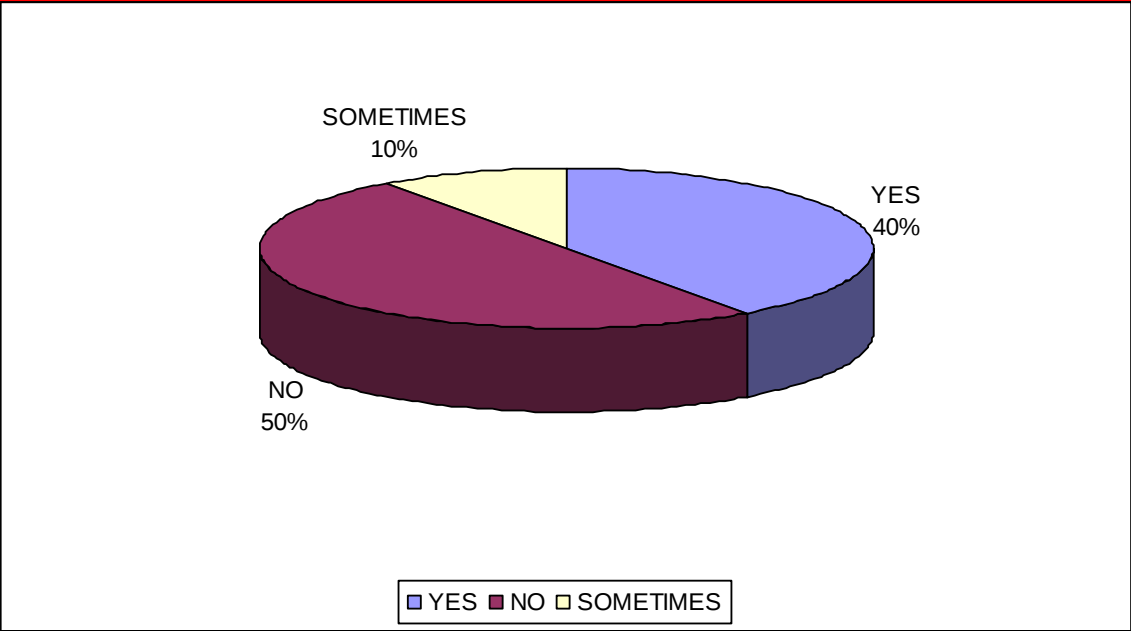
Number of returns that happen in a year on an average

<2	2-5	5-10	>10	DEPENDS
08	01	0	0	01



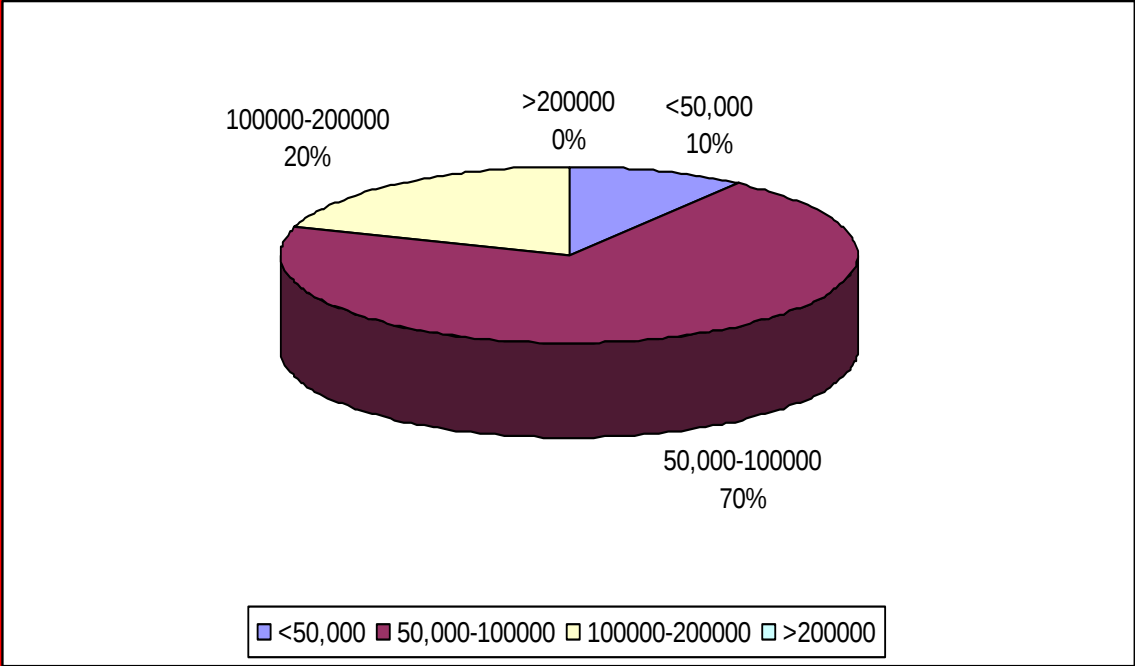
Analysis of additional packaging of goods dispatched to retailer

YES	NO	SOMETIMES
04	05	01



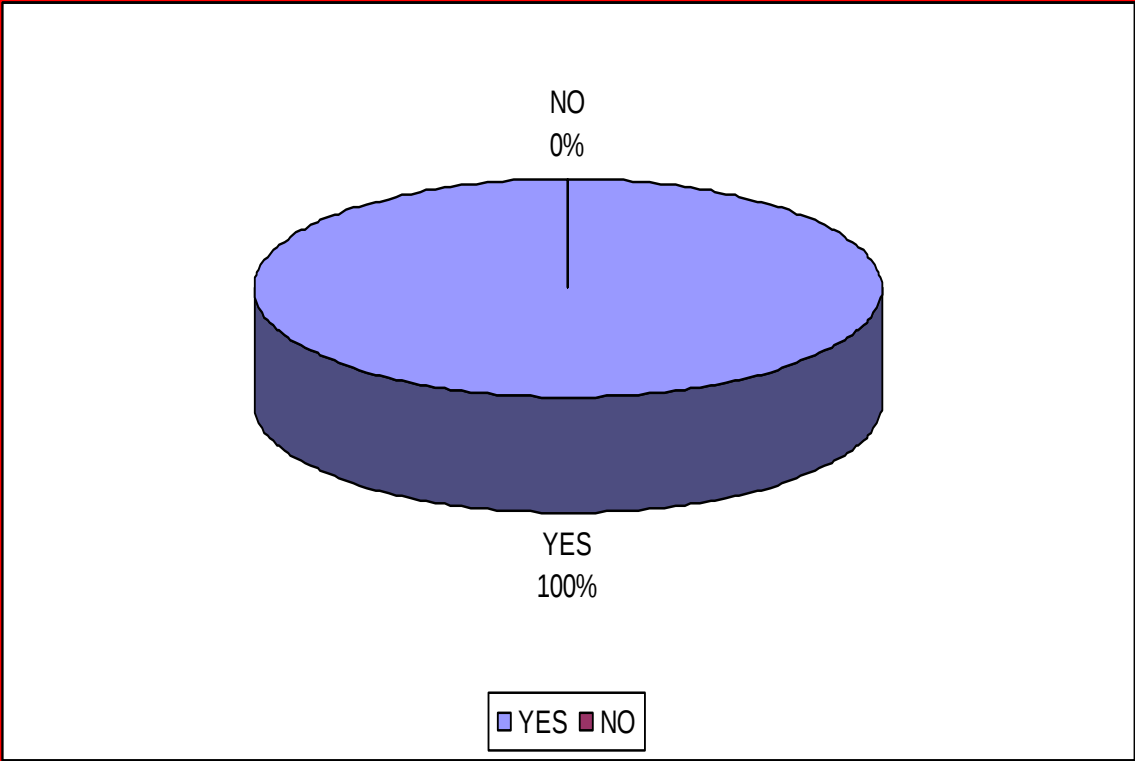
Approximate cost incurred towards transportation by the distributor

<50,000	50,000-100000	100000-200000	>200000
01	07	2	00



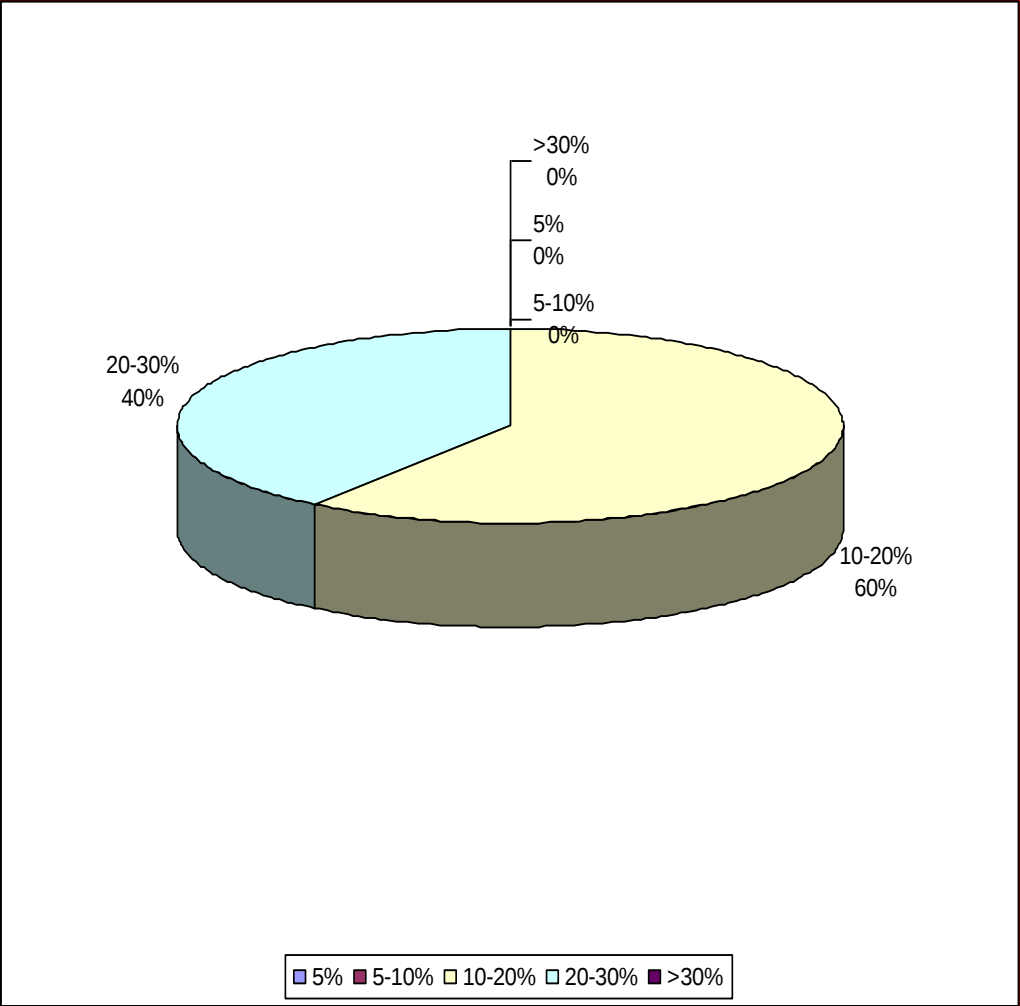
Distributors dealing with goods having Indian origin

YES	NO
10	00



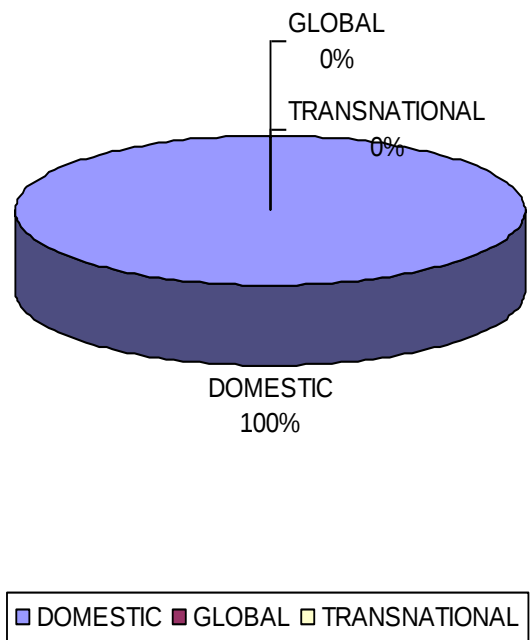
Distributors dealing with goods having Indian origin

5%	5-10%	10-20%	20-30%	>30%
00	00	06	04	00



Analysis showing the brands that move faster

DOMESTIC	GLOBAL	TRANSNATIONAL
10	00	00



FINDINGS

FINDINGS

- Top 6 brands are identified based on their market volumes and value and their overall presence across all areas of the Karnataka.
- Rupa, VIP, Jockey, Mustang, cucumber and zapp analyzed.
- Other branded category includes Mums,Kerokids, Ladybird,Weekender ,Disney,zero,chicita etc.
- Unbranded category includes products available on local retail store and roadside vendors.

Majority of respondents look for brand and quality.

Though overall market is generic in Karnataka and mainly customers buy the branded kids innerwear from retail stores and malls.

- Parents mostly perceive the kids innerwear as apart of child's personal hygiene.
- Parents mainly prefer cotton material with different colours and patterns.
- The parents mainly face the problem of loose shape, rough elastic and improper absorption.
- Some parents prefer unbranded kids innerwear because of affordable price and equally good quality.
- The frequency of purchase is 3 months to 6 months and it is normally washed by hand, automatic and semi automatic machines.
- Mostly the retailers sell branded kids wear like Zapp,Chicita,cucumber,Disney etc
- Normally it is both father and mother who goes for innerwear purchase and also look for different colours and patterns.

RECOMMENDATIONS

Recommendations:

1. In Bangalore parents usually go to the malls and retail stores to buy the kid's wear while in Hubli and Mangalore, they mainly purchase from the retail outlets, so the company should target both malls and retail stores.
2. The parents of the kid's are well aware, is a part of the child's personnel hygiene, so the company has a great opportunity to launch its products with more hygiene, so that it will give the edge over its competitors.
3. The parents of the kid's mainly prefer the cotton material should be 100% cotton.
4. The parents mainly prefer the light shaded innerwear, but should also come up with dark shades, because some parents also go for the dark shaded innerwear especially with blue color.
5. The company should produce a product in different pattern, like popular comic character, flowers etc and also with plain, because many parents want only plain underwear for their children.
6. The texture of the material should always be soft, unlike absorption and the evaporation should be different, either good or average or quick or medium.
7. Maximum parents claim the under wear is loosing shape after few washes and other claims, piling, stitching and elastic problems .so the company should take care of all these things and come up with a product with the lesser problems that will help the company in a great deal in its business.
8. Maximum parents go for the branded clothes, because of the better quality and better brand image, which becomes the real task to the company to come up with a product which is more better than its competitors and can give a good brand image in the market so the company have to promote its products in a unique way against its competitors.

9. Many people buy the unbranded products from the local retail stores and road side vendors, because of price advantage and various designs, the company can also target to these road side vendors and retailers by selling the product at economy price.
10. The company can target upper class people, upper middle class people in Bangalore because these people buy branded clothes, unlike in the Hubli and Mangalore. The company can target middle class and lower middle class and the upper lower class people.
11. In Bangalore, Hubli, and Mangalore - Most of the parents feel that undergarment is a need and most of them buy when the previous ones are still in usable condition and the frequency of purchase is 3 months to 6 months, so this also gives an opportunity to the firm to manufacture the products according to the needs of the customers.
12. Mainly parents of the kid's are responsible for the purchase of the underwear and sometimes children also influence so the company should promote the product very well so that the parents get influenced.
13. Out of 50 end users i.e. parents , 18 parents are happy with the existing brands and the remaining always look for better ones with best quality, good comfort level , hygienic and price. So the company should keep all the things in consideration before launching the product.
14. Many parents suggest that night wear is not required for the child, while some suggested that it can also be used as a day wear, so the company should only target the upper class people.
15. If the company wants to hold good market share, then it is very important it should manufacture the products that are best in quality, have more durability, and enormous variety.

BIBLIOGRAPHY

10. Research methodology by C. R. Kothari's

11. Marketing Management by Philip Kotler.
12. Sampling techniques by G.S. Berry.
13. News papers (Deccan Herald, Times of India)
14. Websites (www.lilliput-India.com, www.bodycareinternational.com)

ANNEXURE

Response schedule for the Indian kid's wear segment: End user--- parents of kid's. (1-8 years of age)

1. Please indicate the places you go for the innerwear purchase?

a) Retail stores

- b) Chain stores
 - c) Small sellers
 - d) Road side
 - e) Friendly neighborhood store
 - f) Malls
 - g) Depends upon the situation
 - h) Others\
2. How do you perceive the child's inner wear?
 - a) it is an important part of child's wardrobe
 - b) it is an under garment; nothing much more
 - c) it is a part of the child's personal hygiene
 - d) never really thought about it
 - e) others
3. Which material would you prefer for the child's innerwear?
 - a) Cotton
 - b) Cotton- blend
 - c) Others
4. Are there any specific colors you prefer for the child's innerwear?
 - a) Light shades
 - b) Dark shades
 - c) Fluorescent shades
5. Which type of pattern would you prefer?
 - a) Flowers
 - b) Patterns
 - c) Popular comic characters
 - d) Super heroes
 - e) Plain
6. What attribute do you consider most important in a child's innerwear?
 - a) The material cotton Cotton blend others
 - b) Texture soft Medium Rough
 - c) Absorption Good Average Poor
 - d) Evaporation Quick Medium Slow
 - e) Others (specify)
7. What are the common problems you face with your child's innerwear?

Problems:

- Variations of size from label claim
- Loses shape after the first or few washes
- Tears very easily
- Colored fabrics bleed leading to fading the colors
- Piling (formation of tiny cotton pellets on the surface) is high
- Stitching of the elastic to the garment
- Not very absorbent; makes the child's feel hot and sultry
- Elastic is rough and hurts the child's tender skin

8. Is there any preferred brand for your purchase?

- a) Yes b) No c) didn't know were branded products for kid's

9. If yes please indicate these brands:

- Zapp, Mustang, weekender, Cucumber, Zero, kid studio, Lady Bird
- Teddy, child world, childhood, Mushroom, Minimales, Disney
- Kero kid's. Others

10. If no, are there any specific reasons why you prefer unbranded Products?

- a) Affordable price b) more design options
- c) Loyal to specific shop d) equally good quality
- e) Easily obtainable f) never thought about it
- g) Others

11. What range do you prefer for your kid's innerwear?

- a) <50 b) 50-150

12. Why you don't prefer high range innerwear for your children?

- a) kid's out grow innerwear very soon

b) just an undergarment

c) others

13. Where would you normally buy these unbranded good?

a) Local garment store

b) Road side vendor

c) Others

14. Why do prefer the brand you indicated?

a) Better fit

b) better quality

c) more variety

d) Price advantage

e) better brand image

f) Used to the brand

g) others.....

15. What would be the average annual spend on the child's innerwear?

a) <200

b) 200-400

c) 400-600

d) 600-800

e) >1000

16. What is the factor that induces you to go in for the child's innerwear purchase?

a) Impulse

b) Need

c) Others

17. When do you actually consider purchasing the child's innerwear?

a) When previously purchased ones are worn out

b) When previously purchased ones are still in usable condition

18. What is the frequency of purchase?

a) Monthly

b) Once in 3 months

c) Once in 6 months

d) Once a year

19. Do you solely decide on the kid's innerwear to be purchased? Or does your child influence your decision?

- a) I am the sole decision maker
- b) I buy what ever my child tells me to buy
- c) Largely decided by me; sometimes my child plays a role
- d) Depends on the situation
- e) Influenced by others(friends, relatives, peers etc)

20. How do you normally wash the child's inner wear?

- a) Hand wash
- b) Semi automatic machine wash
- c) Automatic machine wash
- d) Don't know

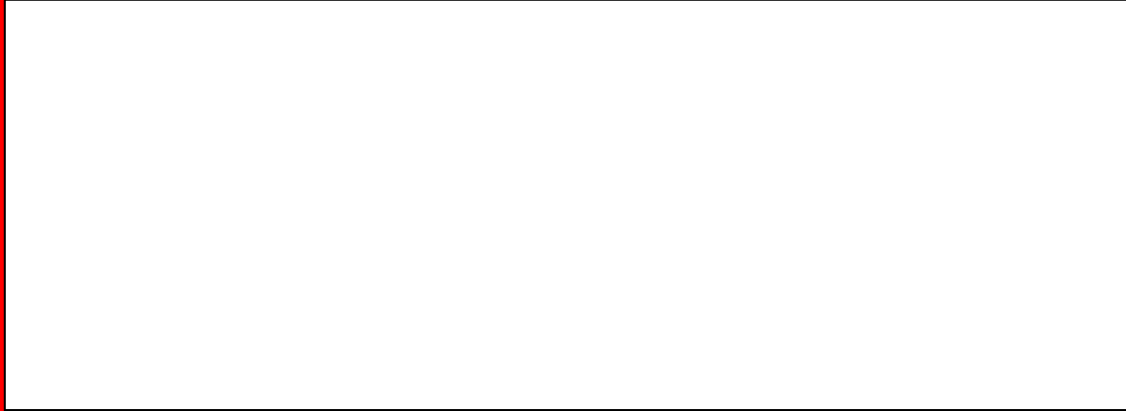
21. If a high quality branded inner wear for children are sold in the market for very reasonable price would you be willing to try the same?

- a) No; I am happy with the existing brand
- b) No; unbranded clothes are ok for me
- c) No; don't think a child needs branded products
- d) Yes, if the products are priced on par with the ones child currently uses
- e) If the quality is on par or better then the ones child currently uses
- f) If the comfort and fit are better than ones child currently uses
- g) If there is more variety and better than the ones child currently uses
- h) Yes, if there is something very unique and different about the product
- i) May be, can't say

22. What do you think about having comfortable night wear specially designed children?

- a) Don't think exclusive night wear is required for a child
- b) Provided it also can be used as a day wear
- c) Provided it is affordable (please note price range.....)

23. Is there any way you think a child's innerwear could be improvised to make it more comfortable and long-Lasting?



24. Which of the following best describes your lifestyle preferences (tick all that are appropriate)?

- | | | | |
|--------------------------|--------------|---------------|----------------------|
| a) Movies/Theater: | Multiplex | Theatre | Drama |
| b) Games | Adventure | Fun oriented | Physical |
| c) General | Beach | Park | Exhibitions |
| d) Shopping | Malls | Branded goods | Commercial complexes |
| e) Restaurants | Occasionally | Frequently | Rarely |
| f) Parties | Occasionally | Frequently | Rarely |
| g) Discotheques | Occasionally | Frequently | Rarely |
| h) Music concerts | Classical | Cine Music | Western |
| i) Library | Occasionally | Frequently | Rarely |
| j) Others (specify)..... | | | |

Response schedule for the kid's inner wear: Distributors.

1. What goods do you deal with?

- a) Branded b) Un branded c) Both

2. What are the kid's inner wear brands that you deal with?

3. What is the standard shipment size (from manufacturer)?

- a) 100 b) 500 c) 1000 d) others

4. Is there a possibility for damage of goods in-transit (from manufacturer)?

- a) No b) <2% 2-5% 5-10% > 10%

5. What is the approximate interval between the placements of orders and the time the goods reach the distributor?

- a) One week b) 10 days c) A fortnight d) A month

6. Is there a minimum order quantity that a distributor needs to place with a manufacturer (depot)/ C&F/ super stockiest, for goods to be dispatched? If yes, please specify the amount (either in value terms/ volume terms :

- a) Yes b) No

7. Is there any upper ceiling for the amount of stock that can be held at distributors place? If yes, please enter the relevant amount.

- a) Yes b) No

8. What system of payment exists between manufacturer (depot)/C&F/ Super stockiest distributor? If, cash, please indicate discounts (%) if any and if Credit please indicate the period.

- a) Cash b) Credit c) Both

9. Does the manufacturer provide any special privileges to an exclusive Distributor(in addition to routine discounts and credit)? If yes, what are these benefits?

- a) Additional discounts
b) Additional credit

- c) Extra stock at no additional cost
- d) Others -----

10. Which of the following describes your retail base?

- a) Exclusive
- b) Common retail stores
- c) Shopping malls
- d) All of the above

11. How many retailers do they cater to?

- a) < 20 b) 20-40 c) 40-60 d) 60-100 e) > 100

12. What is the usual credit period extended to the retailer?

- a) A week b) A fortnight c) A month d) Over a month

13. Do you undertake emergency goods dispatch (say, overnight)? How often do situations occur when such dispatches may be required?

- a) Weekly b) Fortnightly c) Once a month d) Once a quarter
- e) Rarely

14. Are there occasions where goods shipped to the retailer are returned? If yes, what would be the percentage (approx) of such stock returned (in terms of either volume or value)?

- a) Yes b) No

15. What are the usual reasons for return of goods from the retailer?

- a) Damaged goods
- b) Wrong shipment(in terms of size/ type of product)
- c) Goods not meeting quality standards
- d) Others -----

16. How many such returns happen in a year, on an average?

- a) <2 b) 2-5 c) 5-10 d) > 10

17. Does the distributor provide additional packaging to the goods when dispatched to the retailer?

- a) Yes b) No c) Sometimes

18. What would be the approximate cost(in rupees on an average/annum) incurred towards transportation / logistic charges to reach the goods to the retailer?

- a) < 50000 b) 50000 – 100000 c) 100000 – 200000 d) > 200000

19. What are the means of transportation of goods in the following situations?

- a) Under normal conditions -----
b) During a natural calamity -----
c) When goods are needed urgently -----

20. Do all the brands the distributor deals with, have an Indian origin? If yes, what is the approximate margin realized on these brands?(if yes move to Q.No. 23)

- a) Yes b) No

21. When dealing with brands other than Indian, what would be the approximate Margin realized on those brands?

- a) 5% b) 5-10% c) 10-20 % d) 20-30% e) >30%

22. Which brands , amongst the following move relatively faster?

- a) Domestic
b) Global
c) Transnational brands.

Response schedule for the Indian kid's inner wear segment: Retailers.

1. Do you sell kid's inner wear?

- a) Yes b) No

2. Do you deal with branded goods or unbranded goods in kid's Inner wear?
- a) Branded b) Unbranded
3. What are the different brands that you deal within kid's wear?
- a) Zapp b) Chicita c) Cucumber
- d) Mustang e) Zero f) Disney
- g) Others -----
4. Have you observed any upward trend in the kid's inner wear Purchase for the last five years?
- a) Yes b) No c) Can't say
5. Could you indicate who normally comes to your shop for kid's Inner wear purchase?
- a) Father b) Mother c) Others
6. Does the child influence the purchase decision for his/ her inner wear?
- a) Yes b) No c) Can't say
7. Do your customers look for specific colours/ patterns for the kid's Inner wear ?
- a) Yes b) No c) Can't say
8. What is the normal package size for the kid's inner wear that you deal with ?
- a) One b) Two c) Three d) pack of six
9. Do you under take any special efforts to increase the sale of the kid's inner wear purchase?
- a) Discounts b) Advertising c) Offer like buy two get one free
- d) Others

10. Do you give any discounts on the kid's inner wear?

- a) Yes b) No

11. If yes, then please indicate the approximate percentage?

- a) 1-2% b) 2-5% c) 5-7% d) 7-8% e) > 10%

12. What is the credit period extended to you by your manufacturers/
distributors?

- a) No credit b) 15 days c) 1 month d) 45 days e) Others

13. What is the approximate margin you operate on ?

- a) 10% b) 15% c) 20% d) 25% e) 30%

- f) > 30%

