

Global survey reveals consumers' jeans joy and denim blues

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HONG KONG – Leading global research firm today released survey results that show Levi's global dominance in denim; the cheapest jeans buyer (Americans!) and the most lavish (Russians!); and that 16% of women would rather shop for a swimsuit than try to find the perfect pair of jeans.

Synovate surveyed around 7,700 people in the United States, Canada, Brazil, France, Taiwan, Korea, Malaysia, Serbia, Russia and South Africa on all-things denim: fit, quantity, brand preferences and the amount people are willing to spend to achieve jeans nirvana.

Brands making the cut

Price aside, Synovate asked respondents which brand they would most like to own. With no restrictions on answers - brands could be global or local - a third of all people chose a global and / or designer brand.

The clear global favourite is Levi's with more than one in five respondents nominating the classic brand as their most preferred choice. This was as high as 45% in France. Around a third of all people in Malaysia, the United States, Serbia and South Africa also chose Levi's.

Synovate's Managing Director of France, Thierry Pailleux, said that in France, Levi's is not just any brand.

"Levi's is the jeans brand in France. It is seen as the authentic US brand. The brand has an almost mythical status. In fact, one would say 'I am going to buy Levi's', not 'I am going to buy a pair of jeans'."

Streetwear and the celebrity effect

The Synovate jeans survey also looked at whether people noticed jeans brands on the street or those worn by celebrities. A total of 26% agreed they keep an eye out for brands on the street, with South African respondents particularly focused on street fashions (62% agreed). Malaysians are also brand-aware with 44% agreeing they pay attention to streetwear.

The least likely to notice what others are wearing are the French (89%), Canadians (82%) and Americans (80%).

This pattern was maintained when people agreed or disagreed with the statement 'I notice the brands of jeans that celebrities wear in magazines'. An overall 26% agreed, with the highest results in South Africa (60%) and Malaysia (42%).

Again, the people who disagreed were intriguing, with the French topping the list at 94%, US at 84% and Canada at 88%.

Global Head of Decision Systems for Synovate and a specialist in retail research, Hans Raemdonck said: "Perhaps with US magazines full of celebrity endorsements and 'style watches', people have become somewhat desensitised to the brands on famous bottoms."

I'll take them in blue, black and bootleg

When it comes to jeans, it seems one pair is not enough for most respondents. Across the 10 markets surveyed, 31% of people own three or four pairs of jeans and another 29% own from five to 10 pairs. Drawers are fullest in Brazil, with 14% of respondents in that market saying they own more than 10 pairs of jeans and 40% with five to 10 pairs.

Ignacio Galceran is CEO of Synovate in Latin America and says this is not too surprising.

"Brazilians have a relaxed, but sexy, sense of style and denim is a good fit with the lifestyle. Owning many pairs gives clothing options for most occasions."

At the other end of the scale, 29% of Malaysians do not own any jeans at all with the next closest jean-free groups at 13% in Taiwan and Russia. Synovate's Managing Director for Malaysia, Steve Murphy, attributes this to the local culture.

"We have many distinct cultural groups in Malaysia which means a greater diversity in overall wardrobe choices. Many Malays and Indians, especially women, choose traditional attire. More and more young people are choosing jeans though and it's not at all uncommon to see traditional head scarves teamed with denim," he said.

The jeans blues (or.... does my butt look big in these?)

A great pair of jeans can elevate an outfit from drab to fab; and a person from woe to wow. Why, then, is it such a challenge for people, especially women, to find flattering jeans?

Forty-five percent of all respondents agreed with the statement 'I find it very difficult to find a pair of jeans that fits perfectly'. People who have the hardest time are Serbians (59%), Americans (57%) and Canadians (53%).

Raemdonck said that manufacturers may have challenges even getting people into the fitting rooms as many are discouraged before they even start their jeans search.

"The survey showed that, not surprisingly, more women (55%) than men (37%) reported difficulties in getting a perfect fit. This may be because women have higher expectations of how jeans should make them look and, potentially, lower self-esteem."

Synovate also asked female respondents to rank the jeans search against the similarly challenging quest for a swimsuit. Expecting the swimsuit search to inspire far greater despondency, we were surprised to find that 16% of women across the 10 markets find this easier than buying jeans.

"Jeans brands already put a great deal of time and effort into making the fitting process as easy as possible for their customers. Clearly there are further opportunities to stand out in consumers' minds. It must be said, though, that people come in a vast array of shapes and sizes, so this is no mean feat," he said.

The Synovate jeans survey showed that 63% of women said buying jeans was easier than a swimsuit - and 10% said neither was! Canadian and American women faced the greatest difficulties with 30% and 28% respectively saying neither purchase was an easy one.

Picking the perfect pair

People love jeans, own many pairs, but find it hard to get a perfect fit. Given all this, Synovate asked respondents to choose one factor above all others, which would influence their purchase of jeans.

Quality appears to be the highest determinant of purchase with 39% of all respondents choosing 'They are good quality and will last a long time'. This factor won out over cost with 22% selecting 'The cost is reasonable'.

The survey found differing priorities across markets. Fifteen percent of Serbians chose 'They camouflage my flaws' and 15% of Koreans went for 'They make me look slimmer'. Koreans were also most likely to be influenced by brand with 17% choosing 'I like the brand' above all other factors.

When it came to style, the Russians and the French were ahead of the pack with 11% and 10% respectively choosing up-to-the-minute fashion as the most important purchase factor.

Priorities changed somewhat when analysed by gender. While quality remained top priority across gender, women were far more likely to want their jeans to camouflage flaws or make them appear slimmer.

What price perfection?

Jeans nirvana has been achieved and the perfect pair is in the hands of the consumer. Now, what are they prepared to pay?

Hans Raemdonck explains that price will obviously change from market to market according to standard of living.

"For the sake of easy comparison, we asked people to name their top price in US dollars for jeans they considered perfect for their needs. A whopping 37% globally expect to pay less than US\$40 - and this is not just confined to lower income countries.

"Seventy-six percent of respondents in the States selected US\$1-40 as the most they would pay - making Americans by far the lowest spenders for denim. Jeans companies have their work cut out for them in the States. People expect a great

deal for their \$40."

At the other end of the scale, 26% of Russians surveyed said that they would spend US\$120 or more for jeans, with 10% prepared to spend more than US\$200.

Maria Vakatova, Director of Marketing Communications for Synovate in Russia, said this was all wrapped up in the fact that people like to get attention at any price.

"When Russians go to an exclusive club, for example, they will not be accepted by their circle if they wear cheap jeans. This is the 'glamour' disease, and it is widely spread in Moscow.

"In fact, it is not uncommon for women in particular to spend a large part of their monthly salary for a brand they like. The reason? To attract men, of course! A Russian woman puts a great deal of effort into this.

"Another factor is the Russian propensity to splurge - Russians have a tendency to waste money and prefer to live in the here and now," she said.

At the very top-end, 5% of Russian consumers are willing to lay down US\$280 plus, as would 3% of Taiwanese. Thirteen percent of Koreans are prepared to spend over US\$200. Serbians are willing to invest in their 'dream jeans' too with nearly a quarter prepared to spend US\$120 and over.

The survey found that overall, seven in 10 people expect to pay somewhere under US\$80.

The skinny on style

When are jeans stylish and when are they inappropriate? Synovate asked people whether jeans were OK for the office or passÂ© for parties and found that the style-conscious French have a different perspective from most others.

An overall 37% agreed that 'jeans are appropriate office attire' but this shot up to an amazing 87% in France. Despite this strong French acceptance of jeans as office-wear, denim is clearly not party attire in France, with 74% of respondents disagreeing with 'I almost always wear jeans to parties'. Again this is in considerable contrast to the overall results, with 39% happily donning jeans for parties, with up to three quarters of all South Africans doing so.

Curiosities

- Around two-thirds of all American women have kept a pair of jeans that are too small for them in the hope that one day they will fit again.
- 45% of all respondents agreed that, given a choice, they would wear jeans every day. This figure rose to 68% in Serbia and 65% in South Africa.
- Of all women, Koreans have the easiest time buying jeans with 52% disagreeing with the statement 'I find it very difficult to buy a pair of jeans that fits perfectly'. Of men, Brazilians have the fewest hassles (67% disagree with the statement).

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