



The Boutique@Ogilvy 2016 Men's Shopping Report

BACKGROUND

On behalf of The Boutique@Ogilvy, the Research Group conducted quantitative research to gauge American men's fashion trends and shopping habits. This survey was conducted online within the United States by TNS on behalf of Ogilvy from January 7-11, 2016 among 1,232 American men ages 18+.

Audience	N=	Field Period
American Men 18+	1,232	January 7-11, 2016

Data has been rounded, so 'select one' questions = 100%. Whereas, 'select all that apply' questions will add to over 100%.

In the media highlights, findings related to Millennial men as well as age[^] and generation^{^^} differences are *italicized*. When an audience is significantly higher than the corresponding group, the number is denoted with an asterisk (*).

A (NET) is an unduplicated view at the percentage of respondents that selected designated attributes [e.g., Store & Product Policies/Conditions (NET)]

[^]Age: *Younger Men (under 35), Older Men (over 35)*

^{^^}Generations: *Millennials (ages 18-33), Generation X (ages 34-49), Baby Boomers (ages 50-68), Silent Generation (ages 69-86)*

MEDIA HIGHLIGHTS

Vast Majority of American Men Have a Defined Personal Style

94% of American men report they have a defined personal style.

Casual/Relaxed = American Men's Most Common Personal Style

Over half (53%) of American men report casual/relaxed best describes their personal style. Less than one in ten (6%) report their personal style is a work in progress.

Millennial Men More Likely to Associate With Athletic/Athleisure Style

Millennial men are significantly more likely than other generations to describe their personal style as athletic/athleisure (Millennials, 9%; Gen X, 4%; Baby Boomers, 2%; Silent Generation, 2%).*

Many American Men Look For Inspiration When It Comes to Wardrobe Style, With Retail Stores Being Top of Mind

Four in ten (40%) American men report they look for inspiration from others when it comes to their wardrobe style. Specifically, when it comes to their wardrobe style they are inspired by:

- 17% friends
- 16% retail stores
- 14% family
- 11% street style (i.e., stylish people you see on the street)
- 10% magazines/catalogs

Men Under 35 More Likely to Report They Have Influences When It Comes to Wardrobe

American men under 35 are significantly more likely than their older counterparts to report they look for inspiration from others (64% vs. 34%).*

Specifically, Millennial Men More Likely to Look To Friends, Instagram, Celebrities, and Blogs For Inspiration

Millennial men are significantly more likely than other generations to report they look for inspiration from the following when it comes to their wardrobe style:

- *Friends (Millennials, 35%*; Gen X, 20%; Baby Boomers, 10%; Silent Generation, 8%)*
- *Instagram (Millennials, 18%*; Gen X, 4%; Baby Boomers, 0%; Silent Generation, 0%)*
- *Celebrities (e.g., musicians, artists, actors, etc.) (Millennials, 15%*; Gen X, 7%; Baby Boomers, 2%; Silent Generation, 0%)*
- *Blogs (Millennials, 9%*; Gen X, 3%; Baby Boomers, 0%; Silent Generation, 0%)*

When It Comes To Making an In-Person Wardrobe Purchase, American Men Most Persuaded by Value, Looking Good, and Sales/Promotions

When it comes to making an in-person wardrobe purchase, many American men report they are persuaded by:

- Value (i.e., item is worth the money) (53%)
- Looking good (i.e., feeling good in the item) (45%)
- Good sales/promotions (42%)

Other ways American men are persuaded to make an in-person wardrobe purchase include:

- Ability to try items on (33%)
- Touch and feel of an item (32%)
- Flexible return policy (15%)
- Great customer service (14%)
- Quick check-out process (12%)
- Knowledgeable sales staff (i.e., providing product information) (8%)
- Engaging sales staff (i.e., offering tips/suggestions) (6%)

Men Under 35 More Likely To Be Persuaded by Sales Staff/Customer Service

American men under 35 are significantly more likely than their older counterparts to report they are influenced by people (specifically: customer service, knowledgeable sales staff, engaging sales staff, pressure/guilt from sales staff) when making an in-person wardrobe purchase (27% vs. 18%).*

Being Persuaded By Others In Making Wardrobe Choices Is Also Common

Nearly four in ten (36%) American men report their wardrobe choices are influenced by others (i.e., they are “dressed by” others) on a regular basis. Specifically:

- 27% are “dressed by” their spouse/significant other
- 7% are “dressed by” their friend(s)
- 5% are “dressed by” another family member
- 3% are “dressed by” their colleague(s)
- 3% are “dressed by” sales associates at retail stores
- 3% are “dressed by” their mother
- 2% are “dressed by” a personal shopping website (e.g., Trunk Club)
- 1% are “dressed by” their stylist

Millennial Men are More Likely to be Influenced by Colleagues

Millennials are significantly more likely than other generations to report their wardrobe choices are influenced by (i.e., they are “dressed by”) their colleagues (Millennials, 10%; Gen X, 4%; Baby Boomers, 1%; Silent Generation, 0%).*

Among Millennial Men Specifically, Mom is an Influence

About one in ten (8%) Millennial men report their wardrobe choices are influenced by (i.e., they are “dressed by”) their mother.

When It Comes to Updating Wardrobe, Replacing Worn Out Clothing/Items Is Top Driver; Treating Themselves, Seasonal Change, and Sales/Promotion Are Other Common Reasons

Nearly two-thirds (63%) of American men report they go shopping to update their wardrobe because of worn out clothing/items.

Other common reasons American men report they go shopping to update their wardrobe include:

- A treat for themselves (30%)
- Sales/promotion (26%)
- Seasonal change (24%)
- Weight change (i.e., losing/gaining weight) (22%)
- Career-related (e.g., job interview, new job, important work meeting/presentation, etc.) (16%)
- A vacation (15%)
- Boredom with current wardrobe (13%)

OMNIBUS QUESTIONS

Q1. Which of the following individuals influence your wardrobe choices (i.e., “dresses you”) on a regular basis?
Please select all that apply.

	Total American Men 18+
n=	1,232
ANY (NET)	36%
FAMILY (NET)	31%
FRIEND/COLLEAGUE (NET)	8%
OUTSIDE CONSULTANT (NET)	5%
My spouse/significant other	27%
My friend(s)	7%
Another family member	5%
My colleague(s)	3%
Sales associates at retail stores	3%
My mother	3%
Personal shopping website (e.g., Trunk Club)	2%
My stylist	1%
Other	2%
No one influences my wardrobe choices (i.e., “dresses me”) on a regular basis	64%

Q2. Which of the following do you look to for inspiration when it comes to your wardrobe style? *Please select all that apply.*

	Total American Men 18+
n=	1,232
ANY (NET)	40%
OFFLINE (NET)	38%
FRIEND/COLLEAGUE (NET)	19%
DIGITAL/ONLINE (NET)	13%
SOCIAL MEDIA (NET)	8%
Friends	17%
Retail stores	16%
Family	14%
Street style (i.e., stylish people you see on the street)	11%
Magazines/catalogs	10%
Brand websites	8%
Colleagues	7%
Celebrities (e.g., musicians, artists, actors, etc.)	5%
Instagram	4%
Brand-specific social media pages (e.g., brand Facebook, Instagram, etc.)	3%
Blogs	3%
Pinterest	2%
I do not look for inspiration when it comes to my wardrobe style	60%

Q3. For which of the following reasons do you go shopping to update your wardrobe? *Please select all that apply.*

	Total American Men 18+
n=	1,232
ANY (NET)	87%
PERSONAL DRIVERS (NET)	82%
EXTERNAL DRIVERS (NET)	43%
Worn out clothing/items	63%
A treat for yourself	30%
Sales/promotion	26%
Seasonal change	24%
Weight change (i.e., losing/gaining weight)	22%
Career-related (e.g., job interview, new job, important, work meeting/presentation, etc.)	16%
A vacation	15%
Boredom with current wardrobe	13%
New fashion trend(s)	9%
Life change/milestone (e.g., relocation, birthday, etc.)	7%
Date-related (e.g., first date, date night with significant other, etc.)	7%
None of these	13%

Q4. Which of the following best describes your personal style? *Please select one.*

	Total American Men 18+
n=	1,232
ANY (NET)	94%
Casual/relaxed (e.g., t-shirts and jeans, shorts, etc.)	53%
Practical/utilitarian (e.g., simple, function over fashion)	16%
Professional (i.e., suits, office attire, etc.)	6%
Rugged/Outdoorsy (e.g., cargo pants, plaid shirts, etc.)	5%
Preppy (e.g., cardigans, polo shirts, etc.)	4%
Athletic/athleisure (e.g., workout gear, sneakers, etc.)	3%
Unique/Bold (e.g., clothes that make me stand out, graphic tee, etc.)	2%
Other	5%
It is a work in progress (i.e., I'm still trying to define my personal style)	6%

Q5. Which of the following persuades you to make an in-person wardrobe purchase? *Please select all that apply.*

	Total American Men 18+
n=	1,232
ANY (NET)	84%
INTERACTION WITH PRODUCT (NET)	75%
STORE & PRODUCT POLICIES/CONDITIONS (NET)	52%
PEOPLE (NET)	20%
Value (i.e., item is worth the money)	53%
Looks good (i.e., feel good in the item)	45%
Good sales/promotions	42%
Ability to try items on	33%
Touch and feel of an item	32%
Flexible return policy	15%
Great customer service	14%
Quick check-out process	12%
Knowledgeable sales staff (i.e., providing product information)	8%
Engaging sales staff (i.e., offering tips/suggestions)	6%
Pressure/guilt from sales staff	1%
Other	4%
None of these	16%