



## **When It Comes To Fashion, Brands Matter More – Up 10X In 10 Years**

### **Nike, Burberry and J. Crew Move Up, Ralph Lauren and Banana Republic Down in the 2013 Brand Keys Fashion Brand Index**

NEW YORK NY September 9, 2013 – Fashion brand importance is up again. When the the first wave of the Brand Keys Fashion Index was conducted in 1996, only 3% of US apparel buyers felt fashion brands and their associated logos were of increasing importance to consumers in differentiating their wardrobes.

However, annual research conducted by Brand Keys, the New York-based brand and engagement research consultancy ([www.brandkeys.com](http://www.brandkeys.com)) has revealed a very different story this year. The importance of brand has increased tenfold for consumers, currently at 30%. Consumer expectations continue to rise as shoppers increasingly seek uniqueness in their choice of fashion brands and more emotional engagement with their fashion brands. Taking the top spots this year is one's Favorite Sports Team, Armani, Nike, Ralph Lauren/Polo, and Burberry.

“While it’s true that consumers are cautious about spending, that very reality is what drives them into the arms of true brands,” said [Robert Passikoff](#), president of Brand Keys, Inc. “The more considered a purchase, the greater the role a strong brand plays in the decision making process, especially in the very personal category of fashion, where the brand is the source of emotional engagement, and a surrogate for added-value that engenders positive behavior toward one brand versus another,” noted Passikoff.

#### **Luxury and Leisure, Sharing Space, Engaging Consumers**

“Brand Keys 2013 Fashion Brand Index findings demonstrate the continuing shared space between luxury and more casual, leisure apparel brands,” noted Passikoff. “ Fashion brands like Armani, Burberry, and YSL all moved up from an already respectable showing in the top 15, along with leisure brands like Nike (#3), J. Crew (#6) and Levis (#10). Uniqlo, which made the list for the first time in 2012, is in 14<sup>th</sup> place among male fashion buyers this year.

Ralph Lauren/Polo moved from last year’s #1 spot among women fashion buyers to #6 this year, but only 1 spot down on the men’s list to #4. “Ralph Lauren has always been the ‘gold standard’ in fashion brands,” noted Passikoff. “This year it seems as if casual brands have taken on greater import for men, and more *haute couture* brands for women, which proves that emotional brand engagement is a powerful tool for marketers to meaningfully connect with consumers.”

## **Methodology- The Brand Keys Fashion 15**

For the total audience of 7,500 men and women, 21 to 65 years of age, who participated in the annual Brand Keys Fashion Brand Index survey, the Fashion 15 – the top 15 fashion brands – were ranked on the basis of those brands mentioned most often by respondents on an unaided basis as being more important to them.

Percentages below indicate unaided mentions. Numbers in parentheses represent growth or decline in the percent of consumers mentioning the brand in 2012. Dashes indicate no change, and NA indicates the brand did not appear in the top-15 last year. This year's **Total Audience Fashion 15** rankings were as follows:

1. Favorite Sports Team 39% (+3)
2. Armani 38% (+4)
3. Nike 35% (+5)
4. Ralph Lauren/Polo 34% (-5)
5. Burberry 30% (+10)
6. J. Crew 29% (+5)
7. Calvin Klein 27% (+1)
8. Chanel 25% (-2)
9. Banana Republic/YSL 23% (+1, +4)
10. Levi's 22% (-2)
11. Hilfiger 21% (+3)
12. Coach 20% (NA)
13. Tom Ford/Dior 19% (+4, -)
14. Victoria's Secret/GAP 15% (+3, NA)
15. Brooks Brothers/Tory Burch/Kate Spade 14% (-2, NA, NA)

## **Men's Fashion 15**

1. Favorite Sports Team 40% (-3)
2. Nike 39% (+1)
3. Armani 38% (+6)
4. Ralph Lauren/Polo 35% (+6)
5. Hilfiger 32% (+2)
6. J. Crew 30% (+11)
7. Levi's 28% (+9)
8. Calvin Klein 27% (-2)
9. Brooks Brothers 26% (+3)
10. Burberry 25% (+7)
11. Banana Republic 22% (-1)
12. Lacoste 20% (-1)
13. Tom Ford 16% (-2)
14. Uniqlo 15% (+2)
15. Hugo Boss 10% (-2)

## Women's Fashion 15

1. Chanel 41% (+5)
2. Armani 40% (+5)
3. Favorite Sports Team/Coach 38% (-1, NA)
4. YSL 37% (+7)
5. Burberry 35% (+12)
6. Ralph Lauren/Polo 33% (-8)
7. Dior 32% (+1)
8. Nike 31% (NA)
9. Victoria's Secret/GAP 30% (+11, NA)
10. Kate Spade/Tory Burch 29% (+11, +11)
11. J. Crew/Calvin Klein 28% (-1, +5)
12. Banana Republic/Dona Karan 24% (+3, -1)
13. Tom Ford/Stella McCartney 22% (+6, NA)
14. Marc Jacobs 20% (+4)
15. La Perla/Guess/Levi's/H&M 15% (+5, -4, -7, NA)

"The rising importance of fashion brands generally, and Fashion 15 brands specifically, indicates that value – or the perception of value-via-brand – is of much greater import to consumers, and ultimately, to the success of fashion brands. It's not surprising consumers are looking to brands – and the emotional engagement that brands can create – to make a difference, to meet their expectations, and to delight," said Passikoff.

"In the context of fashion, value isn't just what consumers' dollars buy, it's how fashion fits consumers' lifestyle, self-perception, and expectations. This is especially true in a retail marketplace overflowing in excess of similar products, congruous distribution and bargain basement pricing," said Passikoff.

Brand value and meaning will have more leverage and engagement power than ever. "A lot of clothing labels re competing out there, but – just like the automotive and consumer electronics categories – retailers are going to be seeing more culling of fashion brands by consumers," predicted Passikoff.

### **Methodology**

Since 1996, Brand Keys has annually conducted a national Customer Loyalty Engagement Index survey of nearly 700 leading brands, currently assessing 83 product and service categories. The survey is conducted among 45,000 men and women, 18 to 65 years of age, with respondents drawn from the nine U.S. Census regions. The majority of interviews are conducted via telephone; 25% of the interviews are conducted via central location intercept so as not to exclude "cell phone-only" consumers.

Nearly 20% of respondents, 7,500 respondents (50:50 Men/Women, aged 21 to 65 years of age) also respond to questions about the value or importance they place on the fashion brands and of the clothing brands and logos they feel are important to them.

First, respondents are asked to indicate the importance to them personally of fashion brands, compared to how important they were over recent years. The respondent choices are: Much more important; More

important; About the same; Less important; or Much less important. Then, on an unaided basis, respondents are asked *which brands were* more important to them.

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