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RENAISSANCE man

COURTING TODAY'S MALE SHOPPER

THE FUTURE OF
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SPECIAL REPORT:
**KRS consumer
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RENAISSANCE man

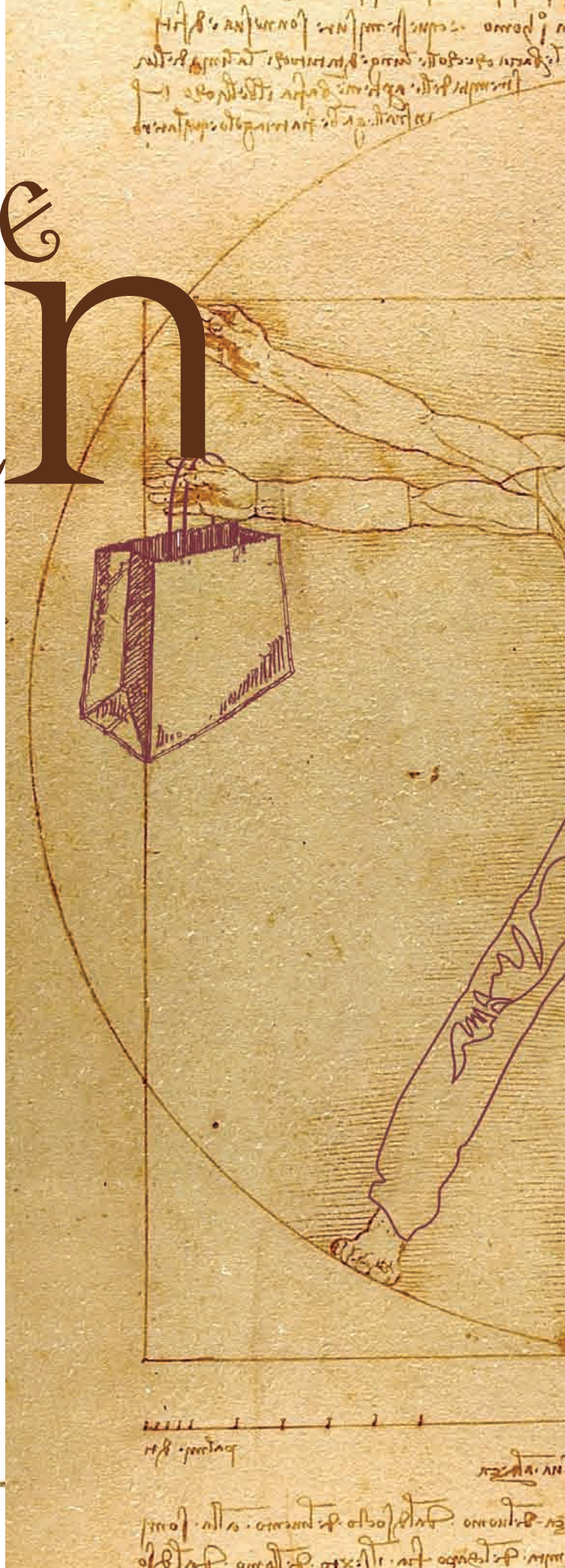
**TODAY'S MALE SHOPPER IS SAVVY
AND SPENDING MORE THAN EVER.
HERE'S WHAT RETAILERS ARE
DOING ABOUT IT. BY ROBERT NIEMINEN**

While we laugh at the truism revealed in the meme at right (some of which still holds true), today's male shopper is quite different from his predecessors. Men are doing much more shopping these days, both in-store and online, and retailers are taking notice and adapting their strategies to embrace the new renaissance man of retail.

Men's retail sales have leapt 4.1% to \$101.8 billion in the past two years, surpassing growth in women's sales, which grew just 2.8% to \$150.1 billion, according to a recent *L.A. Times* article. The article predicted that by 2017, menswear will climb 8.3% to \$110.3 billion. To grow their share of this market, brands from Prada to Guess have opened boutiques for men, while Nordstrom recently purchased online men's styling service Trunk Club.

Online, menswear has outpaced every category from alcohol to auto parts in the past five years, with an annual sales growth of 17.4%, with similar projections expected through 2020, according to research firm IBISWorld. While 57% of online purchases were made by women in 2013, 22% of men made purchases on their smartphones last year compared to 18% of women, according to a recent Business Insider study.

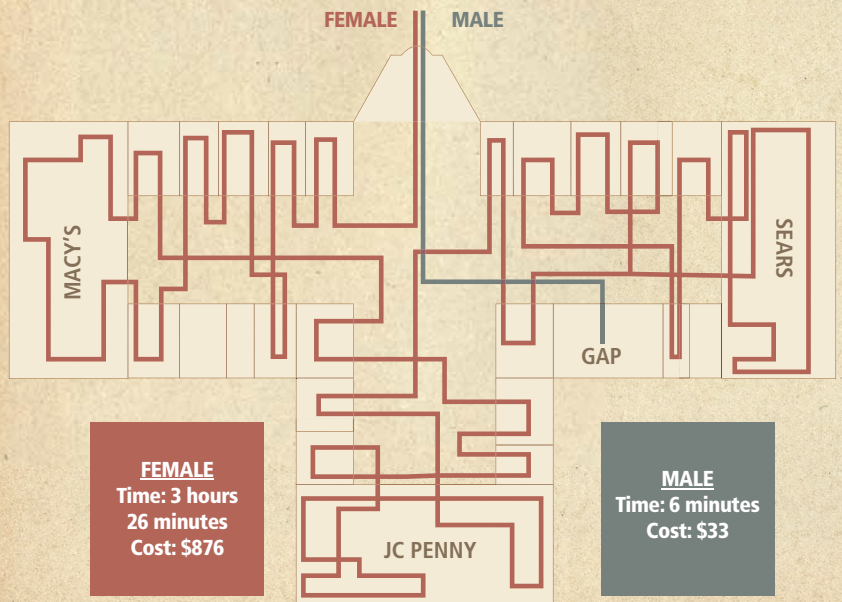
To borrow from the old Virginia Slims slogan, "You've come a long way, man."





An amusing meme that made the rounds a few years ago explains a fundamental difference between how men and women shop. The diagram illustrates the typical route men and women make on a trip to the mall to buy a pair of pants from The Gap.

MISSION: GO TO GAP, BUY A PAIR OF PANTS



Left to right: Rather than overtly masculine design changes, subtle references such as antlers over the fitting room door mark this department as distinctly male in a Lord & Taylor in Albany, N.Y. Schwitzke's updated design for the menswear department of Ludwig Beck in Munich, Germany, defies stereotypes with a light neutral palette. GUESS opened its first shop just for men at Miami International Mall in 2013—an oversized light box calls attention to the small storefront across from an existing GUESS, while metalwork by idX brings a masculine feel.



A SHIFT IN SHOPPING HABITS

While men may not spend as much time shopping as their female counterparts, they are definitely venturing out into retail stores more frequently and, surprisingly, without a female companion.

"Walk any mall or shopping district and you can see more men out on their own not just shopping, but more impor-

tantly, shopping for themselves," says Carm McCormick, director of design and store planning for Canada's Best Store Fixtures in Woodbridge, Ontario.

Joan Insel, associate principal at Callison in Seattle, agrees and says men's purchasing patterns are changing noticeably. "We now have more access to data about men's shopping habits. Technology gives men greater control over the shopping

Lord & Taylor photo: Mark A. Steele

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“Technology gives men greater control over the shopping experience as well as privacy and access to information. They like shopping online that way.”

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Online shopping seems to be well-tailored to men’s shopping preferences, which helps to explain the robust growth in online menswear sales and mobile purchasing trends.

“What retailers are realizing is that women shop, whereas men buy,” says Insel. “So women are more interested in just

wandering around, discovery, and things like that. But men need a little bit more confidence. They’re not recreational shoppers like women are.”

As a result, many retailers are catering to this straightforward approach to men’s buying habits that they’ve become comfortable with online, according to Ji Rook Kim, founder of New York-based design firm Unspace. “Men, when they



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"It's all about getting like-minded people and like-minded brands into one lounge area."

shop online they just type what they want, they get the direct answer, and they make a purchase right away. If they can have a private interaction, private shopping without having to wander from shop to shop, [retailers] might actually make guys enjoy the experience," he adds.

Others don't think men need any more convincing, however. Some believe men are already enjoying the shopping experience in ways akin to female shoppers.

"Men do shop more for themselves now, and they are shopping more like women like to shop with their friends as a social activity," says Charles Sparks, president and CEO of Charles Sparks + Co. in Westchester, Ill. He suggests that men are even shopping for pleasure and as a creative outlet the same way women do.

"Men are basically just falling in line. They're not as afraid to do that as they may have been in years past," he says.

TAILORED SPACES

As a result of the steady increase in men's sales, retailers including J. Crew, Ugg, and Saks Fifth Avenue are not only rethinking men's departments, but also are building completely separate spaces to accommodate a new breed of shopper, according to a recent *Business Insider* article. "Retailers are putting a lot of thought into the layouts of these spaces too—think: places to sit, darker colors, gadgets, and reading material lying around," the article notes.

In other words, brick-and-mortar shops are evolving into a kind of hybrid between a man cave and a social club where man can also buy their favorite items. To that end, international cigar brand Dunhill opened up a stylish gentlemen's tobacco lounge in London where customers can purchase a private humidor, enjoy a casual cup of coffee, host business meetings, attend catered events, and of course, learn about the fine art of smoking stogies, according to Insel. Similarly, she points out that Lexus introduced a series of branded Intersect Lounges around the world (in Tokyo, New York, and Dubai to date), which blend the best parts of a hotel lounge, art space, café, and retail shop with a car dealership.

"It's all about getting like-minded people and like-minded brands into one lounge area," Insel says.

To do that, retailers are doing more than just selling products—they are promoting lifestyles and building social communities both online and through in-store and out-of-store events to promote the brand, according to McCormick.



Leveraging men's penchant for technology and solution-oriented shopping, UnSPACE designed this first My.Suit store, on NYC's Madison Avenue, based on its website customer experience. Today, five offline stores complement the brand's online presence.

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hat perfection
it.

MySuit photo: Chris Randall Photography; Saks photo: Waldorf Photographic Art; Macy's photo: Charlie Mayer Photography; Strellson photo: Canada's Best



Clockwise from above: Dubbed The Fifth Man, this men's store in Saks Fifth Avenue's Chicago flagship features revolving art installations and made-to-measure suiting; fixtures by NicoNat Manufacturing and metalwork by Amuneal Manufacturing contribute to the sophisticated vibe. Men's departments also are getting more visual merchandising attention, with displays like this one at Macy's Herald Square. Menswear brands like Strellson are broadening their reach; this temporary Toronto shop was designed and built by Canada's Best in eight weeks.





Clockwise from above: In its redesign for the 4th floor of Macy's Herald Square, Charles Sparks + Co. used digital signage, action-posed mannequins, and geometric neon for an urban sensibility. Men's stores like Wormland in Berlin are increasingly featuring seating, reading material, and amenities such as coffee. Technology plays a significant role in appealing to the male shopper at Macy's Herald Square.



"As a society we have genderized dark woods and metals as being masculine. We see it in many store formats take shape in classic sleek to industrial punk looks with the addition of raw woods."

"What is different is they are selling the dream, selling the lifestyle, and they can do that by being able to offer not only the clothes but also the accessories to finish the look. Menswear brands in particular are leveraging the ongoing trend of affordable luxury, bringing the custom tailored look and feel to ready to wear."

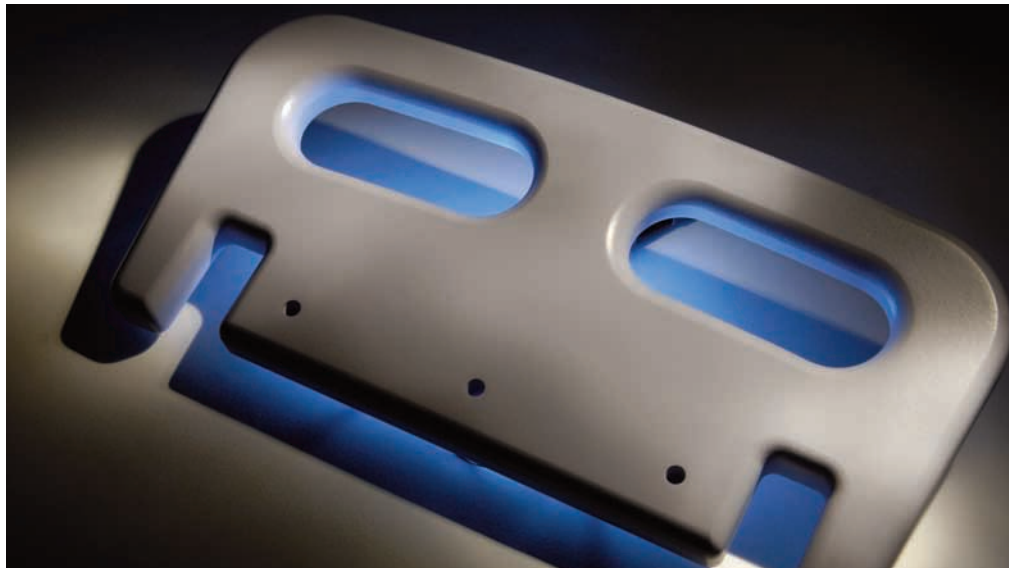
Creating a unique shopping experience tailored to men can be a challenge, however, especially for department stores such as Macy's that bring multiple brands under one roof. But that's exactly what Macy's set out to do (and accomplished) in a four-year, storewide renovation of its iconic Herald Square location in Manhattan. In the most extensive renovation and reallocation of space in the history of its Herald Square store, Macy's and interior design and planning firm Charles Sparks + Co. totally expanded and revamped the men's department,

picking up an additional 53,000 sq. ft. of sales area and a total of 180,000 sq. ft. of men's merchandising across seven floors.

Charles Sparks + Co. systematically removed walls that hid escalators, exposed ceilings, staged worlds of related merchandise, and added an urban feel with design, materials, and new lighting. The change not only makes the store more understandable and accessible, but re-energizes the Macy's experience for its male clientele.

"We have realigned and re-layered it by floor and made better connectivity and logic between merchandise and the flow for wayfinding and so forth because men's is selling on seven floors," Sparks says of the extensive renovation. "It was all about applying best practice principles of clarity, of circulation, of having the proper width of aisle, and opening up the space."

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Left: Like Macy's, Saks Fifth Avenue is getting just as creative in visual merchandising for men as it does for women. **Right:** Nordstrom's recent purchase of the online Trunk Club illustrates the retailer focus on the male shopper.

“The environment has to support the DNA of the brand vs. following any specific trend.”



AESTHETICS DEBATE

While the masculine aesthetic in retail environments has typically been expressed in colors, materials, and finishes that are darker or metallic in nature, reducing the equation to such simple terms is not only ineffective, it's also stereotypical. Dark woods and metallic finishes may be used effectively in the design of spaces that appeal to men. But what should drive the design process is ensuring that the space accurately represents the brand as a whole.

“As a society we have genderized dark woods and metals as being masculine,” says McCormick. “We see it in many store formats take shape in classic sleek to industrial punk looks with the addition of raw woods.”

While McCormick notes that such design elements can offer a safe approach and neutral backdrop for menswear, Sparks cautions that retailers should avoid being cliché and using materials in such a broad context. “The environment has to support the DNA of the brand vs. following any specific trend,” he says.

McCormick echoes that sentiment, saying, “The store environment takes its form from the brand. If the menswear brand is known for its vibrant prints and is not shy of color or pattern, then dark woods and dark metals may not necessarily do the brand or clothing justice. With this new surge in men shopping, men are more aware of style, trend, and color. They now expect designers to be more careful in what materials and looks they choose to make the stores appealing to them.”

Still, some aesthetic choices obviously won't resonate with brands or the men who are loyal to them. Painting a motor-



cycle showroom pink, for example, is counterintuitive, according to Kim. "It's a very simple idea, but we definitely want to make a bolder statement and give the physical [environment] more weight, texture, and something you won't see in the digital world in terms of scale and pattern." Sparks says there's no magic panacea for creating environments that appeal to men, or any other consumer segment for that matter. What is needed, rather, is an approach that is executed "with great detail and authenticity, because a lot of people are experiencing a lot of different spaces now, and they have all these different channels and ways to access goods, so you have to follow through consistently with what your brand value really is."

THE PROMISE OF A GOOD EXPERIENCE

Ultimately, retailers will be effective in reaching a more sophisticated male demographic using the same principles that work with any customer, says Sparks. "Regardless of age or gender or location or even economic strata, retailers are seeking better ways to connect through all forms of touchpoints—whether it's digital media or the physical store, mobile devices, and everything else. The physical

store has to make sure it's following through on its promise of a good experience."

According to McCormick, that can be accomplished in three ways: by offering extended services, paying attention to details, and providing exclusivity. While it might seem counterintuitive to drop off a customer's purchases at their home or place of business, McCormick says this approach "can drive more brand loyalty and create the desire to come back when they are ready to spend."

When it comes to details, "everything from the physical environment of the store to the clothing and accessories itself, and the staff supporting it—when it all is cohesive—will run like a well-oiled machine and create the comfort for your customer to get the assistance he needs to complete his shop," she says.

McCormick notes that everyone—male or female—loves to be part of something exclusive. Inviting customers to become part of a group can help create a positive, meaningful experience. "Offering your customers insider sneak peeks to new collections, all access to in-store events, etc., can go a long way toward encouraging the share of wallet that customer spends on clothing goes to your store vs. another." 🌈

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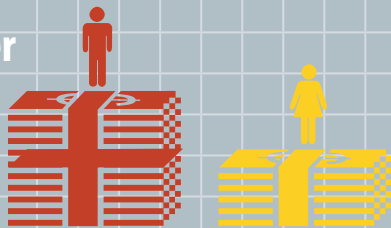
TARGETING

Whether or not men still hunt and women still gather, retailers should be paying attention to the male shopper. Sort through the stats we gathered for you and devise a strategy for targeting the mansumer.

WHY TARGET MEN?

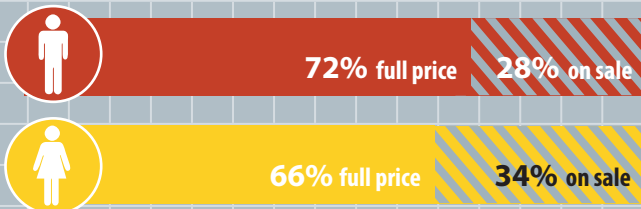
Spending power

Men have **50% more** disposable income than women have



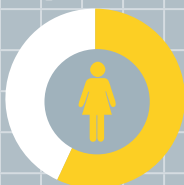
Higher margins

They spend **72%** of their retail purchases on full-price items compared with 66% of women's retail purchases.



Desire to shop

57% of women view shopping as entertainment



But so do **44%** of men.



WHAT ARE THEY BUYING?

APPAREL

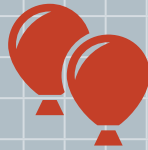
In 2014, sales of menswear items **grew 4.5%** compared with 3.7% growth for womenswear.

FOOD

Men represent **43%** of primary food shoppers.

THE HUNTERS

HOW TO REACH THEM



Entertain them

Men get bored after a mere 26 minutes of shopping vs. 2 hours for women.



Show them products

29% of men aged 18 to 40

21% of older men

complain of insufficient wayfinding and product information compared with 16% of women aged 18 to 40 and 18% of older women.

Get them in and out

Men only require two things to frequent a store:

68%

Interest in helping you find what you're looking for

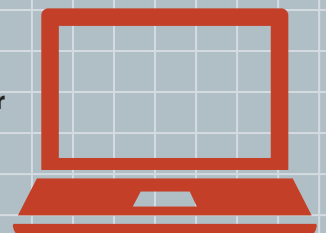
32%

Effort in getting you through checkout quickly



Email the receipt

Men are much more likely to hide purchases from their partners (41% vs. 22% of women), and of those who do, 59% shred the incriminating receipt.



BEAUTY ITEMS

50% of men aged 48 to 67 feel no shame in using moisturizer and eye cream.

INCIDENTALS

Male shopping trips in C-stores lead female trips 57% to 43%.

Sources: CSNews; DDB Life Style Study; Euromonitor; Food Shopping in America 2014; He Buys, She Shops; JWT; Monolith; Nielsen; Voucher Cloud