Abstract

Triumph came to Sri Lanka when the term lingerie was not even commonly used. Lingerie was referred to as 'under garments' and not mentioned or discussed in public. They were hidden in a corner of the closet, tucked away in shelves in a store, and worn only as a means of fulfilling a functional need. There were no established players with a distinctive personality in Sri Lanka, and the market was a commodity market. To tap into this, Triumph had to redefine the market itself. It created new dimensions in the functional value placed by women on lingerie, and also attached an emotional value. In doing so, it had to break established taboos in the Sri Lankan cultural context by advertising lingerie, open display in stores, measurements for lingerie, availability of 'fit-ons' etc. The underlying theme of the study is how Triumph International Lanka (Pvt) Ltd managed to establish the Brand through introducing new dimensions to 'Consumer Value' and capture a large market share in Sri Lanka. The entry of Triumph created a paradigm shift in the way intimate wear is treated, worn and perceived. The company changed the face of lingerie marketing in Sri Lanka and veritably shook a market that was in hibernation. It managed to create a brand image where a bra is no longer seen as a garment worn out of necessity, but as a fashion accessory that is essential for your personal grooming and outward appearance, and also make you feel good about yourself. Thus, the ambience for lingerie shopping was created.

Key Words: Branding, Commodity, Value

1. Introduction

Consumers have come a long way in being an economic man, taking rational decisions when it came to how his life is conducted. They have become progressively sophisticated, and their needs have grown to be increasingly diverse, and difficult to decipher. To complicate things further, these needs change at regular intervals. Hence, in today's
dynamic market place, it is becoming increasingly important to identify and continuously meet the needs of the consumers and consistently be in touch with the values sought by them.

The success of a business organization lies in the extent to which it meets the needs of the target consumers. However superior your product is in terms of quality as compared to that of your competitors, however attractive your price points or the advertising campaign are, they will fall short of capturing a place in the consumer’s mental filing system, or the mental schema, and also will not make a big impact on the bottom line, if you are not delivering the value the consumer seeks.

The key to being included in this mental filing system would be to meet the consumer value sought. The values delivered will distinguish that brand from the rest of the players in the market. In a market that comprised products or commodities, establishing and communicating the values that are attached to a brand will no doubt push that brand far ahead of the others.

2. Categorization

A category is defined as "The process of understanding what something is, by relating it to prior knowledge".

Categorization could be performed in two ways:

- Taxonomic: An orderly classification of objects, with similar objects in the same category
- Goal Derived: Assignment of things to a category because they serve the same goals, even though they may have very different features

There are associations inherent in each of the categories. The objects that fall into the categories are perceived to possess these associations and are comprehended with the help of these associations. These associations are termed schema. Schema plays a major role in marketing an object to appeal to consumers. As long as the consumer can identify an object as belonging to a particular category, and hence will not be lost in identifying it, marketers may opt to introduce new associations for that object to make it more attractive to the consumer. Sub categories may exist, sharing associations of the main category, and having associations of its own.

3. Commodity

Liyanage (1997) describes a category or set as a commodity. This category or set will include all the products that are perceived to be of that commodity type. It can have sub categories based on form or purpose. These inherit the associations of the category. A brand is an entity, a referent or a point in that defined category.
In the above example, soap is a category, toilet soap is a sub category and 'Lux' a brand under the sub category toilet soap. In the formation of categories, intra-category homogeneity and inter-category heterogeneity are normative. Clearly, a brand possesses some characteristics of its immediate sub-category and, to a lesser degree, those of its larger category. The brand-specific characteristics may dominate the identity of the brand, or, the category specific characteristics may dominate. In the latter case, the brand may not be that distinguishable from the commodity, whereas in the former, it has distinctive characteristics that identify it as unique.

4. Brands and Branding

The American Marketing Association (AMA) defines a brand as a "name, term, sign, symbol, or design, or a combination of them, intended to identify the goods and services of one seller or a group of sellers and to differentiate them from those of competitors". These different components of a brand that identify and differentiate it can be called brand elements. Consumers associate the product with the brand through these brand elements; this is a psychological response. If they are removed from a product, only the physiological response to the product remains. In a holistic sense, Liyanage (1997) defines a brand as "a market entity whose identity and personality are tangible in the mind of the consumer".

Branding is a fundamental concept within the marketing discipline. Branding has become so strong that hardly anything goes unbranded, even fruits and vegetables. Consumers view a brand as an important part of a product, and branding can add value to a product. The difference between a brand and a commodity can be summed up in the phrase 'added values'. (Chernatony & McDonald, 1998)
Branding is a two-way street as it helps the consumer to make a purchase decision and stick with it each time they make a purchase of the same good, rather than make the decision by considering a series of facts each time they visit the store. The brand assures that they will get the same features, benefits and quality each time they buy the branded product. It also helps the supplier as it assists them in communicating the values attached to the product to the consumers more clearly.

5. Value

The concept of customer value is central to the design and development of brands (Liyanage, 2003). A brand provides differentiated value to its customers through the brand attributes of association (Doyle, 2000). In sum, a brand is a promise; it is a value offering to the customer.

Sheth et al. (1991) refer to functional and emotional value as two of the five values that influence consumer choice behaviour. Numerous marketing literatures refer to this concept in different ways. Functional dimension relates to what the product or service does. The emotional dimension relates to the feelings held about a brand. This is the dimension that is concerned with feelings, sentiments, moods and emotions about the brand. Aaker (2002) brings a third dimension into the equation, a value proposition based on self-expressive function. Here, functional value refers to the 'Use Value' and the non-functional value refers to the 'Sign Value'.

Some refer to these two dimensions as stemming from the two hemispheres of the brain. That is, think products that are usually processed logically and analytically, implying rational sequential thinking; hence left brain processing. Feel products that usually use a synthetic, holistic, and intuitive approach are, characteristic of right brain processing.

It is further perceived that intrinsic product attributes (attributes that are tangible and intrinsic to the brand, and those that produce its performance) lead to functional value which have a relatively weak emotional response, whereas extrinsic brand attributes (attributes that connote meaning or are derived from associations of the brand) lead to non-functional value, which have a typically strong emotional response. From this distinction, it is clear that it is not the brand attributes nor the cognitive process that leads to the functional or emotional value, but it is rather a perceived value, which may motivate a consumer to act.

Gutmen, 1982; Reynolds and Gutmen, 1988, provide a more comprehensive explanation of the concept value through the means-end chain. Here, personal values are the ends people seek and means are the things people use to reach those ends. Means refer to the product attributes and benefits or consequences that flow from those attributes. Personal values are described as motivating end-states of existence that individuals strive for in their lives (Gengler and Reynolds 1995). As one moves up the ladder of the means-end chain from attributes to end values, the level of abstraction increases, and the value sought changes from instrumental to terminal. These two levels of abstraction are referred to as 'Use Value' for the functional value and 'Sign Value' for the non-functional value. Use Value is further classified as "value for me" and Sign value as "value of me". These are the two broad value paradigms.
By expanding the above, Liyanage (2003) defines five value domains with a hierarchical ordering. In this classification, brand types, central meanings, core purposes and roles are assigned to the consumer for each value domain. This still has relevance to the Means-End chain, as the five values could be placed in the chain with an increasing level of involvement on the part of the consumer.

It is argued that with an increasing level of branding, the place of representational or "of me" value becomes more important, and so does the role of branding.
6. The Company

Triumph International started as a family company in Heubach (Württemberg), Germany, in 1886. One hundred and fifteen years later, Triumph International Group is represented in almost every country in the world. The company produces and markets foundation garments, lingerie and nightwear, swimwear and beachwear as well as men’s underwear, swimwear and home wear.

Triumph, a world leader in manufacturing and marketing of Intimate Apparels, set up operations in Sri Lanka in the year 1995, under the name of Triumph International Lanka (Pvt) Ltd. A privately owned, international company created a paradigm shift in the way intimate wear was worn, treated, perceived and marketed, with its entry to Sri Lanka.

Triumph’s signature presence is evident through open displays, strong branding and innovative and colourful range of styles. Triumph in Sri Lanka is known as a company that markets innovative and fashionable intimate wear and is perceived as the “aspiration brand” in the lingerie market. On commencing the second decade of existence in Sri Lanka, Triumph continues to delight customers with an array of new styles and more exclusive locations for lingerie shopping with an incredible ambience and service that you need to experience.

Triumph enjoys a 15% penetration in the urban market. Lingerie marketing is still in its infancy, and the market comprises a significant percentage of young adults. In the fashion segment, value growth generally outstrips volume increases. Triumph enjoys an estimated 27% value share in Sri Lanka.

The vision of the company is “To be the fashion brand that every Sri Lankan woman aspires to experience”, the brand positioning being “An ‘innovative fashion brand’ that offers ‘ultimate wearing pleasure’ for ‘contemporary women.”

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Table 1: A Brand Value Typology

<table>
<thead>
<tr>
<th>Value Domain</th>
<th>Brand type</th>
<th>Central Meaning</th>
<th>Core Purpose</th>
<th>Customer Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functional</td>
<td>Think</td>
<td>“What it does for me?”</td>
<td>Solves problems</td>
<td>User</td>
</tr>
<tr>
<td>Experiential</td>
<td>Sense</td>
<td>“What it does to me?”</td>
<td>Creates pleasure</td>
<td>Experiencer</td>
</tr>
<tr>
<td>Relational</td>
<td>Relate</td>
<td>“What it does with me?”</td>
<td>Helps belong</td>
<td>Member</td>
</tr>
<tr>
<td>Social</td>
<td>Project</td>
<td>“What it says about me?”</td>
<td>Enhances status</td>
<td>Communicator</td>
</tr>
<tr>
<td>Psychological</td>
<td>Reflect</td>
<td>“What it says to me?”</td>
<td>Heightens self-worth</td>
<td>Actualizer</td>
</tr>
</tbody>
</table>


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Triumph in SL adopts a multi-channel distribution strategy in order to effectively reach a wider group of customers. The three main shopping malls in Colombo—Crescat Boulevard, Majestic City and Liberty Plaza—have exclusive lingerie boutiques and there are counters in all key locations such as Odel, Nolimit, Beverly Street, Fashion Bug and fashion retailers island-wide. These outlets serve as direct sales points. There is a dedicated sales counter at the head office to serve the dealers from the network marketing channel, the retailers and any customers who walk in for purchases.

7. The Triumph Story

The transformation of Triumph International into one of the world’s leading manufacturers of lingerie and underwear is a global success story. The owner-operated company with 48 subsidiary companies now enjoys a presence in over 120 countries. For its brands Triumph, Sloggi, Valisere and HOM, the company develops, produces and markets underwear, sleepwear and swimwear both wholesale and through its own retail establishments.

In Sri Lanka, Triumph International Lanka (Pvt) Ltd mainly focuses on the lingerie (underwear) market. At the time of the Triumph launch, the market was underdeveloped and very narrow. It was a commodity market and associations that existed with the sub category ‘underwear’ as it was known, back then within the category ‘Clothing’ were very limited. The main attribute of the category was to ‘provide support’. A main aspect of lingerie—‘Fit’—was measured in a one-dimensional space, where only the band size was taken into consideration. ‘Fashion’ was unheard of.

When Triumph did its launch, the first uphill task it had to face was to define the market. Earlier, the bra was known as an item of clothing that was ugly, and worn just to serve a functional need, less comfortable and literally thrown to or hidden in a corner of the wardrobe. There was just one style available that has penetrated the entire market, suitable only for the saree jacket. They were available only in a restricted colour range, black and white. Sizing was based on band size, and was available only up to size 34.

Triumph had to transform the unglamorous ‘underwear’ category into a much more glamorous ‘lingerie’ category. To do so, they opted for the method of communicating the different attributes or associations that exist to lingerie. In other words, Triumph made its broad consumer base, 16 to 60 years, middle and upper income earning females, aware of the different associations that exist with the word lingerie, and what they were lacking so far with the products in the Sri Lankan market. Hence, the first brand values were launched: Comfort, Fashion, Quality and Innovation (Figure 5). These initial brand values are, in essence, intrinsic product attributes, and defined the category ‘taxonomically’.

Moreover, these attributes not only defined the category but also defined the foremost player in that category, the brand ‘Triumph’.

The first set of brand values launched by Triumph concentrate more on the ‘Use Value’ component of consumer value, of ‘Value For Me’. As their knowledge of the consumers grew...
with time, they would realise the importance of the 'Sign Value' or 'Value Of Me' to the consumer and, change these values accordingly to reflect it.

*Figure 4: Initial Changes to the Value Domains at the Launch*

By changing the values associated with the word 'lingerie', Triumph redefined the benefit women derived from wearing lingerie.

*Figure 5: Values to Benefits*

Source: Triumph International Lanka (Pvt) Ltd.
The company strived, as illustrated in Figure 4, to transform these values into providing the consumers with an end benefit that is to be ‘Fashionably Confident’. Therefore, value, was just means to an end, the end being to make women feel ‘Fashionably Confident’.

A consumer’s buying behaviour reflects his/her innermost feelings, passions and emotions. Therefore, how much a brand appeals to the emotions of a consumer will have a great impact on the purchase behaviour in relation to that brand. On the other hand, consumers will seek information about the products they feel emotional about.

Great brands strike a personal chord with you. They make you feel better, different, bigger, smaller, happier, more comfortable, warmer, more confident. They reach parts other brands only dream about. From being physical, brands have become psychological. Brands are about hearts and minds, feelings and emotions. They touch us.

Richard Branson, Thomas Gad, 4-D Branding, Cracking the corporate code of the network company, 2000)

Changes to the attributes consumers identified with when it came to lingerie and expansions to the associations of the word lingerie were not done over night. This uphill task was achieved as a result of a series of brand communication strategies that was aimed at transforming old-fashioned, functional lingerie into a piece of clothing that had an emotional impact on the women who wear them.

Figure 6: Transformation of Impact on Consumers

<table>
<thead>
<tr>
<th>Functional Impact</th>
<th>Experiential Impact</th>
<th>Emotional Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduce Different cup sizes to suit any woman</td>
<td>Serve a functional need or Appeal to the aesthetic</td>
<td>Make shopping for a bra into a pleasurable experience in finding the perfect fit, as well as finding the bra that is suitable for the exact need.</td>
</tr>
<tr>
<td>Eg: Cup size A to F</td>
<td>Eg: bras for different occasions and bras of different colours</td>
<td></td>
</tr>
<tr>
<td>Basic Utility</td>
<td>Vibrant Fashion</td>
<td>Emotional Satisfaction</td>
</tr>
</tbody>
</table>

Source: Triumph International Lanka (Pvt) Ltd.
Initially, the company did not target a specified target segment, but tried to pitch into all the different facets that existed within the broad consumer base. However, it soon realised that this approach makes their differentiation tactics weaker, and proceeded to identify the different types of consumers, so that it could pitch to the selected segments based on the need, and not on price points. As such, three primary segments were identified.

- **Culture Custodians**: More conservative, traditional women
- **Wannabes**: People who want to be fashionable, and look smart, but do not have a large pool of disposable income to spend on being so. This segment has potential for future sales
- **Career Warriors**: This segment is the main market, they are career oriented women who thrive on being fashionable, and who have large amounts of disposable income to spend on being so.

Out of these three segments, the target group was reduced to ‘Wannabes’ and ‘Career Warriors’. The basic profile of these two segments was 18-35 years, strong, independent, empowered women with a defined sense of fashion.

In the traditional lingerie market that prevailed, a bra could only be distinguished by band size, and had a minimal colour range of two (black and white). However, Triumph came and redefined what was known as a ‘fit’ in a bra; that there are two dimensions to it rather than one. (band size as well as cup size) They introduced bras that had a superior fit.

They invited the women and young girls to come and check out the fit that is ideal for them, and how wearing the bra with the correct fit enhances your outer appearance and posture. In short, they communicated to the market that ‘There’s a bra for you’. Triumph repositioned the lingerie and bras, in particular as a fashion accessory. The channel chosen to distribute the products was ideal for this approach - Exclusive Boutiques. This revolution in the functional dimension is the first peg through which they drove home their competitive advantage of being an international level lingerie producer.

Once the key customer group was identified, Triumph went on to identify the different product categories that are needed when servicing these consumers. The distinct product categories that were identified in this study are highlighted in Figure 7.

The current products that were in the market clearly did not cater to these distinct product categories required to satisfy the needs that existed in the market. Although they provided the basic need of assisting to maintain form and beauty, they were in no way suitable for the other needs that were present. Triumph had to educate the consumers that there is lingerie designed for different functions or purposes, such as Sports and Feeding, briefs designed with different functionality, and also speciality bras in the form of t-shirt bras depending on the outerwear, maximizers, minimizers, etc.

They also brought forward the more glamorous ‘fashion’ attribute into lingerie. While women were used to only one style of bras in a limited colour range of black and white and basic
briefs, Triumph presented an exciting range of vibrant colours and different styles of bras and briefs to suit the occasion and need. Their lingerie was adorned with exquisite laces and high quality fabrics mostly sourced within Europe, under-wire Bras were introduced to provide additional support and form alluring figures, party bras were introduced that could be worn with evening wear of different styles. This helped women to expand their horizons of fashion and look attractive and glamorous in whatever the outerwear they wish to be dressed in.

While they introduced the attribute of glamour into the market, they were also careful not to completely ignore the more traditional women, who preferred to wear the conventional attire of the saree. For them, Triumph has a classic collection to suit their purpose. This range is mostly locally produced in the MAS apparel factory Bodyline, and is relatively priced lower than the imported range. This range offers the same support and shape that is provided by the most patronized player in this segment 'Senorita' while offering the additional benefits of comfort and a better fit, and also an improved colour range. The look and feel offered by Triumph in this range is also by far superior to the other local players, and the quality too is unmatched.

Triumph’s successful entry and acceptance in the market place is based on two key differentiators:
• Innovative Fashion Styles - Innovative designs, vibrant colours;
• Revolutionizing the retail landscape in Sri Lanka in-order to provide a complete brand experience, using a multi-channel distribution strategy.

When Triumph entered the Sri Lankan market to introduce high value lingerie to the market, the first channel chosen was its own boutique in Majestic City, a shopping mall patronised by the majority of the urban population in Colombo. Exclusive lingerie boutiques were an innovative and revolutionary concept for Sri Lankan women. In these boutiques, women could be free from prying eyes and be among others from their own gender and check out lingerie that makes you look good. Triumph revolutionised the dormant lingerie market through the use of bold product-marketing strategies that differentiated its products from those of competitors.

The setting up of the Triumph Boutique enabled the company to continue to test new challenges such as price resilience, style acceptance and colour preferences, before rolling out to broader retail markets. It also helped drive its fashion positioning, through the concurrent introduction of innovative concepts launched regionally at its boutiques.

Unlike in a retail store which has poor lighting, store layouts, and poor merchandise display when it comes to lingerie, in a boutique Triumph is in control of the atmosphere.

They could make it as pleasant to the consumer as possible to transform the chore of lingerie shopping into an "experience".

As brand awareness was being created in the market, the company put yet another innovative idea into practice. They launched a direct sales network. Triumph being a premium brand that required a certain level of education, a network-marketing channel was an excellent means to penetrate the market, and was an excellent channel to reinforce brand benefits to customers. It also offered self-employment opportunities to Sri Lankan women.

While both these delivery channels were in progress, Triumph went into a third channel with the mass market in mind, that is, to make their products available through the established retailer network. This was carried out keeping in mind that the majority of the market do not patronise the exclusive lingerie boutique or have access to the direct sales network dealers, but did their clothes shopping with organised retailers.

Figure 8 illustrates the exponential rise in boutiques sales very clearly. This confirms that the company is on the right track. Triumph themselves believe that the most valuable distribution channel for them currently shows most potential for the future, and the one that provides most value to the end consumers is exclusive boutiques.

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Brand values play an essential role in building the brand and as a result create Brand equity. These summarize how the company personifies the brand or what the brand stands for. The initial brand values projected by the company from the launch in Sri Lanka back in 1995 were Comfort, Fashion, Quality and Innovation. Functional value was given priority. However, the global company soon realized that the continuity of these values over a long period of time led to Triumph being categorized as an old-fashioned brand that is not in tune with the contemporary woman. In fact, the company later realized that the initial brand values are, in essence, the production engineer’s idea of marketing: communicating product attributes. Thus, they kept the first steps of changing the category they fit based on features of the product to be categorized based on the ‘Goals Derived’.

Hence, while maintaining the superiority the brand had in terms of the old value attributes, Triumph launched a new set of values in 2007, to be associated with the brand that are more in line with the end-benefit derived. These were slightly changed in 2009.
Communication of these brand values starts from how Triumph approaches a collection at its inception and is driven down to how the collection is marketed. The new brand communication would demonstrate women who are in control of themselves and their environment.

However, in Sri Lanka, sometimes the changes introduced to brand values are a little ahead of our market. Therefore, the response of the Sri Lankan market to these changes is comparatively lesser than that of the Western markets. There is also another crucial factor that affects these brand values from being projected to the Sri Lankan market, that is, the cultural taboos that exist against nudity. Hence, the company has restricted themselves to use imagery exclusively within the boutiques and within the retail enclosures where the products are on sale.

In order to communicate the values and attributes of the brand to the market and create awareness, Triumph has carried out various brand communication strategies. As they launched the product in the Sri Lankan market, the biggest billboard for them was the Triumph boutique at Majestic City. This announced their presence very loudly to the shoppers patronising the shopping mall, who represented a large portion of their target consumer base.

Triumph also used another novel way of communicating the superior value offered by the brand. It adopted a premium pricing strategy that reinforced the brands positioning of being an "innovative fashion brand". This strategy, although acting as a deterrent to some segments of the market, sent a very strong message that here is a brand that is superior to all other generic products available in the market in terms of the traditional yardsticks, and offers much more than any other product in the category by providing superior value.

The 'schema' or the salient associations with the brand could be identified as follows.

Figure 10: Schema of brand 'Triumph'

At the point of entering the market, Triumph found it very difficult to grasp the needs and wants of the market, as there were no tracking studies available for this particular market, viz. lingerie. As an international lingerie manufacturer and retailer, Triumph realized the need to fill this knowledge gap, and the importance of understanding the consumer. The most important endeavor that stands above the other efforts in understanding the consumer has been the Brand Equity Studies (BES) carried out by Quantum Strategic Services (Pvt.) Ltd, on behalf of Triumph, first in 2003 and next in 2007.

The Brand Equity study mainly focussed on evaluating the brand recallability and understanding of the brand attributes among the consumers. This study confirmed the fact that Triumph is perceived as a high value brand without a doubt. However, the brand is restricted to a niche market penetration.

From an Expert image (Brand Equity study 2003), the brand relationship with Triumph has now grown into a bonding relationship with a Mother. The relationship with the ‘Mother’ is projecting a multi-faceted experience to the user through which the relationship is taking a turn towards becoming My mother = My lifetime friend. The relationship is opening up to an understanding of a two-way dialogue between the two. This is the same characteristic of the brand relationship between Triumph and the consumer.

*Figure 11: The Qualities of a Mother, Associated with the Brand*

Another part of this study compared the brand with its competitors in terms of Factors that Affect Brand Loyalty. It was revealed that Triumph has a high appeal in terms of ‘Durability’, ‘Comfort’, ‘Body shape’, ‘Value for money’, ‘Colours/Designs’ and ‘Good-fit’, the only factor with
low appeal being 'Price'. Although the consumers are convinced of all the factors that build up Triumph as the ideal lingerie, the price may stand in the way of them being loyal to Triumph.

The most important observation is that Triumph users take the overall finish to their hearts, and derive satisfaction from using a superior product. Other users derive satisfaction mainly by purchasing a product that is 'value for money'. Triumph has a clear identity of being a 'Premium Brand'.

Every company endeavours to create a positive attitude in the consumer’s mind with regard to their brand. The cognitive portion of attitudes affects the ultimate purchase decisions, as the majority of our purchase decisions take the think, feel, do path. Therefore, positive attitudes will go a long way in setting the thinking process in motion and making the brand popular among the consumers. Attitudes do not stagnate; they evolve over time as a reaction to the environment. Triumph had to take this attitude creation one step further; as they had to create and drive forward the attitude that is attached to the category as well. They are largely responsible for the attitudinal change in the consumers mind with regard to lingerie.

Figure 12: Attitude Progression towards Lingerie

This attitudinal change clearly reflects the transformation in value paradigms in the consumer’s mind from "Value for me" (Functionality) to much more private and intimate "Value of me" (Sensuality). The attitude transformation led by Triumph has predominantly assisted the company to put its stamp very clearly in the Sri Lankan market, and establish its name as the number one lingerie Brand in the country.

8. Validation of the Study

Sri Lanka is a country that is heavily influenced by Eastern culture. Therefore, the subject 'lingerie' is still considered as taboo by most parties. Hence, independent reviews performed of the lingerie market or the company in particular without their involvement are very rare. Therefore, the authors decided to employ the best method of capturing the dimensions of consumer value and the sentiments towards the brand 'Triumph'; a consumer survey and a
field study covering three key stakeholder groups. This permitted the authors to gain first hand information about the consumer base.

1. Consumers
2. Boutique sales personnel
3. Direct Sales network dealers

The survey was done through a questionnaire on a convenience sample that was exclusively female. One might consider this fact as being a restriction in the survey. However, the authors’ intention was to capture the rationality behind why females who ultimately become the end user, purchase lingerie. From the demographic details, it could be deduced that the average profile of a respondent was females of 25 to 30 years of age, graduates who hold executive level jobs and earn a monthly income of Rs. 50,000 to 100,000. This coincides with the key target group of Triumph.

The survey was designed to capture the preference of consumers towards branded lingerie vis-à-vis generic lingerie. 85% of the respondents preferred Branded lingerie in contrast to the 15% who preferred generic products. This is a long way forward from a commodity market that only comprised unbranded products. 97% mentioned Triumph as the salient brand, while some coupled it with the local brands; two respondents did not specify a salient brand. Nine respondents (14%) out of the 63 who mentioned a salient brand stated that they do not patronize the brand in the local market, while 54 respondents (86%) stated that they do.

The majority (21 or 39%) of the consumers who purchase the brand do so more often than not, 28% (15) patronize the brand exclusively, while 28% (15) do so occasionally. By observing the results of who introduced the respondent to the brand, it was seen that the "Mother to Daughter" link does not hold any more when it comes to branded lingerie. Only 28% claimed that their mother introduced them to the brand, while the other 72% claimed other sources such as advertising, friend, colleague and other.

The main reason for not patronizing the brand is the premium price, as was highlighted in the brand equity study. Only a small fraction (1/9) of respondents believed that the brand does not offer anything special in terms of value (quality, fashion etc.) delivered. Three respondents felt that the value proposition offered by the other products in the market is more agreeable.

The second component of the analysis on consumer value comprised a set of statements, to which the consumers were requested to state their preference on a Likert scale. The statements included in the questionnaire were an assortment that represented the paradigm 'Value for me' as well as 'Value of me'. 11 statements represented the paradigm 'Value for me'; whereas 17 statements represented 'Value of me'. The analysis of the answers given is summarized in Table 2.

The summary of information indicates that the emotional values take a higher place in the consumer’s mind when purchasing lingerie. This is demonstrated by the average scores for
Table 2: Summary of Results on Consumer Value, Value Paradigms

<table>
<thead>
<tr>
<th>Category</th>
<th>Average Score</th>
<th>Value For Me</th>
<th>Value For Me</th>
</tr>
</thead>
<tbody>
<tr>
<td>For consumers who purchase Branded lingerie</td>
<td>44.8</td>
<td>52.5</td>
<td></td>
</tr>
<tr>
<td>For consumers who do not purchase Branded lingerie</td>
<td>43.1</td>
<td>47.1</td>
<td></td>
</tr>
<tr>
<td>Entire Sample</td>
<td>44.5</td>
<td>51.6</td>
<td></td>
</tr>
</tbody>
</table>

Source: Consumer Survey Data

'Value For Me' being 44.5 as compared to the score 51.6 in 'Value Of Me'. Triumph can claim the credit for most of this attitude change, since they are responsible for educating the consumers about the different aspects of lingerie, and providing the consumers an idea of a 'Total Experience' with lingerie.

The survey results further highlight the fact that the emphasis placed on 'Value For Me' is very similar among the two categories of consumers. However, a clear emphasis could be placed on 'Value Of Me'. The score for this is considerably lower for the consumers not purchasing Branded lingerie at 47.1. For those who do, the score is as high as 52.5. Therefore, from these results, we could conclude that although 'Value for Me' criteria (Functional and Experiential value) needs to be met, the consumers who purchase Branded lingerie place more prominence comparatively on the Value Of Me, or emotional values such as Relational, Social and Psychological.

A further analysis of the data to observe the pattern of consumer value in relation to these five value domains (Functional, Experiential, Relational, Social and Psychological) exhibited very interesting results. This analysis is summarized in Table 3 below.

Table 3: Summary of Results on Consumer Value, Value Domains

<table>
<thead>
<tr>
<th>Category</th>
<th>Average Score</th>
<th>Value For Me</th>
<th>Value For Me</th>
<th>Value For Me</th>
<th>Value For Me</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Functional</td>
<td>Experiential</td>
<td>Relational</td>
<td>Social</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Max = 45)</td>
<td>(Max = 15)</td>
<td>(Max = 20)</td>
<td>(Max = 30)</td>
</tr>
<tr>
<td>Branded</td>
<td>33.11</td>
<td>11.72</td>
<td>13.19</td>
<td>17.41</td>
<td>21.93</td>
</tr>
<tr>
<td>Generic</td>
<td>32.09</td>
<td>11.00</td>
<td>9.64</td>
<td>16.09</td>
<td>21.36</td>
</tr>
<tr>
<td>Total</td>
<td>32.94</td>
<td>11.6</td>
<td>12.58</td>
<td>17.18</td>
<td>21.83</td>
</tr>
</tbody>
</table>

Source: Consumer Survey Data

It could be observed that for all five value domains, the values sought are higher for those purchasing Branded lingerie. However, for the two domains for 'Value For Me', a distinction cannot be made on the score. This indicates that both these categories are equally conscious about what the lingerie they purchase can do 'For' them. However, when analyzing the results for the value domains that belong to the paradigm 'Value Of Me' the results are different. A clear difference can be observed for the value domains 'Relational' and 'Social'. The scores for
consumers purchasing branded lingerie are considerably higher for these two value domains. This highlights that they are more concerned about what the product or brand does 'With' them, and what it 'Says about' them. Although it was expected that this pattern would be extended to the 'Psychological' value domain, this was not so. From the consumer survey results, it could be observed that both these categories are emotionally attached to their lingerie and derive personal satisfaction from them. Whether 'Branded' or 'Generic', lingerie whispers the same message 'To' them.

The second segment of the study was carried out by meeting with the sales staff attached to the exclusive boutiques. Since the exclusive boutiques are not visited by a large portion of the consumer base, the intention was to capture the sentiments of the consumers who do patronize the boutiques.

Based on the results, customers spend 10 to 20 minutes in the store on average. This indicates that the customers are willing to spend some time in comparing different styles and trying out the lingerie for the perfect fit. They visit the store mostly with their friends/partners, indicating that Triumph has managed to break through the barrier where women were embarrassed about lingerie and preferred to do lingerie shopping alone. The boutique staff have reconfirmed that the customers are indeed attracted to the ambience in the stores. The encouraging atmosphere that is created by the layouts, lighting, music, variety offered by the complete range, and the specialized staff, all contribute to drive sales in the exclusive boutiques.

They are also enthusiastic about the in-store promotions that are done from time-to-time in the boutiques, and there is an increase of footfall when these promotions are carried out. They are also willing to be included in e-mail mailing lists so that they could be up-to-date with the latest news from Triumph. Consumer loyalty is also indicated by the repeated sales being in the 25% to 50% range. This represents the exclusive consumer base that is 100% loyal to Triumph.

The next section of the field study was dedicated to capture the value sought by consumers when purchasing Triumph lingerie through the direct sales dealer network. The dealers do not have samples of all the styles in possession.

From the results, it was observed that majority of the sales are driven by using the catalogues. It also can be seen that a larger portion of the enquiries are converted to sales. This pattern is a result of most of these dealers having a loyal clientele. This result is fortified by the repeated purchases being considerably higher in the exclusive boutiques.

The consumer survey and the field study enabled the authors to gain first hand experience of the consumer sentiments towards lingerie in general and Triumph in particular in the Sri Lankan market. If the results of the consumer survey and the field study are to be summarized, they would stand as follows.
It is interesting to observe the difference in key value attributes sought by the consumers in general and as seen by the boutique staff and direct sales dealers. The most noted absentee in the three most important value attributes for consumers is 'Fashion'. It could be assumed that this is a result of the sample comprising women who are not partial to branded lingerie and the additional value they offer together with the women who do place a great emphasis on these additional values. Quality features in all three sources as an important value attribute. The quality assurance delivered by Triumph could be one of the main reasons women purchase the brand while cheaper products are available with a much lesser price tag.

Boutique staff as well as the dealers have identified the importance placed by the customer on 'Price'. This is somewhat worrying for a brand that offers superior value for a premium price. Since Triumph adopts a Cost plus mark up to determine price, they cannot afford to price the product at a low price range. The company will have to work hard in retaining the existing consumers and gaining new customers due to this fact.

9. Conclusion

From the above case study and validation, it could be observed that Triumph has now managed to establish its brand soundly in the Sri Lankan market. In the process, it has managed to transform the dormant 'Underwear' market into a much more glamorous 'Lingerie' market; and hence change the commodity market into one that is aware of Brands.

Being the largest player in the lingerie market in the world, Triumph has extensive procedures in place to capture the value sought by the consumers. As a result, the values projected change from time to time to reflect the growing sophistication of contemporary women. While the initial values were concentrated on the functional value, the later values reflect the Emotional relationship women have with their lingerie, and are aligned with the confident woman who believes that she can conquer the world.

### Table 4: Summary of Results of Consumer Survey and Field Study

<table>
<thead>
<tr>
<th></th>
<th>Consumers</th>
<th>As seen by the Boutique Staff</th>
<th>As seen by the Direct Sales Dealers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most sought after value attribute</td>
<td>Comfort</td>
<td>Fashion</td>
<td>Quality</td>
</tr>
<tr>
<td>Second most sought after value attribute</td>
<td>Fit</td>
<td>Comfort / Colour / Quality and Price</td>
<td>Fashion</td>
</tr>
<tr>
<td>Third most sought after value attribute</td>
<td>Quality</td>
<td></td>
<td>Colour / Price</td>
</tr>
<tr>
<td>Subscribe to promotions</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Repeated purchases</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
</tr>
</tbody>
</table>

Source: Consumer Survey and Field Study
The main strategy adopted by Triumph in order to achieve this is to communicate the superior value attributes that are a part of the brand ‘Triumph’. This increased customer knowledge not only helped Triumph to establish itself in the market, but also forced the other players to expand their value attributes in order to retain the market share. However, it can be clearly seen that Triumph leads from the front by being innovative and offering superior customer value. By using various means, Triumph has managed to carve a niche for itself in the lingerie market of Sri Lanka.

In Sri Lanka, however, there are barriers to applying the values driven down by the mother company, as there are cultural taboos as well as a lesser level of sophistication of the female clientele compared to the European market. The Sri Lankan consumer base still places prominence on the functional and experiential values of lingerie. However, the growing number of brand conscious females signals potential for Triumph as they are also becoming aware of the emotional attributes or values of the lingerie they purchase.

Branding certainly has brought success to a multitude of organizations. The strange phenomenon of convincing the Sri Lankan consumer to purchase a brand for a commodity that is not on outer display is the cornerstone of the success of Triumph in Sri Lanka.

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