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Study of Consumer Clothing Behaviour and its Relevance to Successful Fashion Product Development

Study of Consumer Clothing Behaviour and its Relevance to Successful Fashion Product Development

A PhD Thesis submitted by

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to

University College for the Creative Arts / University of Kent in partial
fulfilment for the
Degree of Doctor of Philosophy in Fashion

August 2007

ABSTRACT

Previous research highlighted consumer dissatisfaction with the fashion clothing products on offer. There is a lack of information about real consumers needs due to the industry standards of beauty and behaviour as well as a constant rush for innovation that feeds fashion cycles.

This research identifies the elements that will enable fashion clothing companies to become more inclusive, and aims to find a methodological relationship between the stakeholders in the fashion industry: consumers, designers and companies. The research considered the difference between a mature market as opposed to emergent ones, and addressed differences between Western and Eastern cultures.

An investigation of the elements that determine the choice of fashion clothing products was carried out among British, Brazilian and Chinese consumers. Designers from the three countries were interviewed and their creative practices were compared and analysed in relation to consumers' expectations. Companies from fashion and clothing industries were investigated in respect to their practices, strategies and responsiveness to consumers.

A new conceptual framework is proposed – the Physical, Identity and Lifestyle (PIL) model providing a tool for effective and more focused decision-making to develop better fashion products. The Means-End Chain model – Attributes, Consequences and Values (ACV) was added to the framework, resulting in a six elements model, shaped and named as the Fashion Polyhedron.

British, Brazilian and Chinese consumers have different requirements for fashion clothing products based upon socio-cultural and physical variations. The survey data came from three different continents, thereby providing rich perspectives into global consumption. The evidence suggests that the fashion industry needs to be more aware of consumer diversity. Designers should review their role as mediators between consumers and companies and changes in the educational curriculum are recommended. Companies can use the results to target advertising better culturally. Companies who currently operate within a domestic market and want to enter new global markets, could use the outcomes to improve their product design development decisions. The usage of the Fashion Polyhedron in all stages throughout the fashion clothing product development may guarantee better results to all stakeholders.

Key Words

Fashion, Clothing, Design, Marketing, Management, Consumer Behaviour, United Kingdom, Brazil, China, Design Management, User Needs, Inclusiveness, Fashion Product Development.

i

ACKNOWLEDGEMENTS

ABREVIATIONS

ACV   Attributes, Consequences and Values

BMI   Body Mass Index

BR   Brazil

BRIC   Brazil, Russia, India and China

CEO   Chief Executive Officer

CMPN   Company

CN   China

CSMR   Consumer

DSGN   Designer

DTI   Department of Trade and Industry

GMNT   Garment

GATT   General Agreement on Tariffs and Trade

GBP   Great Britain Pound (Sterling)

GDP   Gross Domestic Product

IFCC   Indicators for Fashion and Clothing Consumption

IT   Informational Technology

KSA   Kurt Salmon Associates

OBM   Original Brand Manufacturer

OEM   Original Equipment Manufacturer

PIL   Physical, Identity and Lifestyle

PR   Public Relations

SME   Small and Medium Enterprises

UK   United Kingdom

WHO   World Health Organization

WTO   World Trade Organization

CONTENTS

FIGURES

Chapter 5

xiv

TABLES

FOR

Risalva and Albérico, my parents, who taught me that knowledge is the most precious wealth;

Mohand, my husband, for believing in the same principle.

Maria Severo, my grandmother, and Érina (Zizi), my aunt, as both had accompanied my journey with this project but due to God's will are unable to see this final outcome.

CHAPTER 1 - INTRODUCTION

**I feel so uncomfortable about having no choice in shops with low waisted trousers.
It's not my style.**

(Consumer comment, Csmr-BR-2004 database)

The fashion industry is one of the fastest growing sectors in the world, and is at the forefront of the economic globalisation process. There are a number of factors affecting the competitiveness of fashion companies from demographic changes to cultural integration and subsequently their financial performance. This has compelled companies to review their business strategies in order to maintain their competitive advantage and market position. Companies have been forced to operate in the global market place in order to maintain their sustainability, but to be successful they should also consider local influences.

A significant factor, as a consequence of globalisation, is rapidly changing market environments, and increasing consumer demand for high quality products at affordable prices. The consumer's appetite for variety has led to increased rates of product proliferation and shortened product cycles (Abernathy et al., 1999). Companies are responding to these challenges through fast fashion, throwaway products and using celebrities to endorse weak products.

Societies are dynamically changing and new identities are emerging through multi-cultural environments and lifestyles. Technology has allowed greater mobility in travel, communication and behaviour and new cross-cultural groups are forming. Standards of beauty are being redefined in terms of body shapes, physical differences, and personal identity by the meeting of Western and Eastern cultures. Fashion is concerned with multidisciplinary perspectives, and is often criticised for apparent irrelevance in a constantly changing world.

Another contributory factor in the need for change in the way companies operate is issues related to the consumers' high levels of dissatisfaction with products and services. According to KSA European Consumer Outlook (1999), 75% of Germany consumers felt that retailers care little about their expectations, followed by 69% of UK consumers, 56% of French and 41% of Italians. On average 60% of European consumers felt neglected by retailers.

Within the same report, 54% of European consumers noted that they did not buy clothing products because they could not find their size, 53% of consumers declared that they did not find their style in the shops, 45% of the survey could not find the item they were looking for and 37% of them said the shop did not have the colour they wanted. These are just illustrations of the high rate of frustration and dissatisfaction experienced by consumers, as 66% of European respondents say they go shopping knowing exactly what they want to buy.

1

The majority of consumers are unable to afford luxury goods that have strong, desirable attributes combined with high price points, and this has resulted in buying barriers and personal frustration. An exclusive product means a limited consumer group, and that has now led to fashion diffusion brands. These diluted fashion product ranges offer affordable prices and allow some democratisation of brands for fashion followers to enhance their dressing style and confidence.

A recent report by KSA (2004a) showed that consumers in the United States are also dissatisfied, and introduced the concept of Mindshare as "consumer awareness of a product or brand as opposed to market share". The 21st century consumer faces a large number of choices, and companies should strive to capture consumer mindshare to answer their target consumer's specific needs.

Companies are failing to meet consumers' needs with their product offerings. The KSA report (2004a) highlighted that 73% of north-American consumers stated that when they see an item they like, they usually don't leave the shop empty-handed.

However, according to KSA (2004a), the most often heard consumer complaint in the United States is about the inappropriate youthfulness of the majority of fashion clothing items. The alarming number of overweight consumers and the ageing of the developed countries' populations should be considered more seriously within the fashion industry. Summarising: style matters and so does size.

Moving to an Eastern analysis, KSA (2004b) found Chinese middle-class consumers more sophisticated, moving out from 'wet' markets[1] and state-owned department stores into modern fashion multinational chain stores. Clothing and footwear is the second largest spending item in China, after food. But KSA's Chinese respondents declared that they did not believe that their voices were being heard. Only 13% of the sample declared that they bought another colour/size/style when their choice was unavailable. As China is an emerging market, companies investing in these environments should rethink both their strategy and business plan.

In general, consumers are not satisfied with the range of core product attributes, such as functional efficiency, ease of use, comfort, quality, and protection and often are disappointed with fitness for purpose. Products are not meeting intangible and tangible aspects together and this provokes discontent.

Moreover, even though the fashion industry and the clothing industry have some key distinctions, consumers tend to consider the product garment as a combination of both

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[1] Wet markets are the traditional way Chinese buy supplies on the street pavement, and where fresh food (live) is sold in aquariums beside perennial goods.

approaches[2]. Fashion industry is closer to style and trends, and needs to hold exclusivity as a catalyser of new product life cycles. Clothing industry is concerned with the social and physiological need to be dressed and the pertinent relations between the body and the garment, from textile fibres to mobility.

Due to its uniqueness, the fashion clothing industry can be seen to be in a transcendent position among fields of knowledge, not considering an analytical viewpoint, but a systemic one. This research investigates the product development process and its relationship with three main stakeholders, and in particular the fashion clothing product.

1.1 RESEARCH PROBLEM

Currently, understanding consumer behaviour is not the responsibility of fashion product development teams and fashion designers. Fashion designers seem to be more concerned with their own personal expression than with understanding consumer needs and their decision-making process. Possible reasons for this situation could be related to their subjective design approach, leading to inaccuracies in design solutions for highly complex consumer groups and competitive global markets.

Traditionally, the marketing department has had the specialist knowledge of consumption processes and sales performance figures, but has lacked in-depth knowledge of product attributes, benefits and values. They tend not to be aware of successful or unsuccessful product attributes that could enhance the relationship between companies and consumers. These professionals are also not considering product innovation as part of the whole strategy of the company and rarely consult designers in the decision-making processes.

Companies tend to measure consumption by the number of pieces sold or profit made. However, an increment on sales seems not to have a direct relationship with satisfaction. It is important to consider as a possibility the recent phenomenon of 'over buyer' consumers as a consequence of the hunt to find a product more appropriate to their needs. Consumer satisfaction should be measured not only by the number of pieces circulating inside a wardrobe, but how frequently those pieces are worn and preferred.

Consumers have a set of requirements that determine their consumption behaviour, and these values affect their attitudes towards fashion products. Fashion companies tend to target the 'ideal consumer', who is affluent, young and beautiful and they do not consider wider market opportunities for their product offerings. The choice and variety is limited to these idealised niche markets, and dismisses the majority of real consumers.

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[2] Considering the consumer point of view, this study will adopt the term fashion clothing to express the combination of both industries.

This study is not about buying behaviour, but about consumption, the act of wearing garments. Even consumers who have an overfull wardrobe often face persistent difficulty in finding something appropriate for the occasion. Some investigation and explanation about this phenomenon is one of the reasons for this research.

This research seeks, though addressing a series of research questions, to understand the needs, expectations, wants and wishes of the consumers as a means of enhancing the performance of designers and companies in a globalised market. In order to investigate these subjects, the research questions are introduced in the next section.

1.2   RESEARCH QUESTIONS

The key research question is related to improving fashion product development processes and strategies so they become more efficient and effective. The study addresses the central question of whether fashion product development strategies can become more effective so as to raise levels of consumer satisfaction, design innovation and company profitability.

The research questions have been classified under three headings, and correlate to the research methodology as shown in Figure 1.1 below.

a) Consumer Questions:

Which elements inside a fashion clothing product could give more satisfaction to consumers considering their diversity? How to identify them and measure their importance?

Companies tend to compete in the same 'profitable' market. Market research tends to concentrate on affluent consumers and those aspiring to climb socially. Are designers and companies sufficiently informed about the majority of the population that do not fit this profile?

The number of consumers that feel excluded seems to be immense, yet they should be included, perhaps using a new model for product development. It is necessary to find out how to combine individual, cultural and socio-economic consumer differences.

b) Designer Questions:

Are designers using market and consumer intelligence when developing fashion clothing products? Are designers taking into account consumer expectations when developing products?

Are designers influencing decision-making processes inside companies? Decisions in fashion companies are not often heavily influenced by the designer's contribution and/or the

4

product concept. Designers are often more committed to creativity. Decisions tend to originate from marketing teams and are more closely related to financial issues. This makes the *product* less important than the *brand*. As a result, combined with the naturally artistic side of creative professionals, designers tend to build a consumer profile that pleases them more.

c) Company Questions:

Are companies responding effectively to consumer demand and requirements? Is the fashion clothing industry consumer-driven? How to improve the success of a product by listening the consumer?

Globalisation and market internationalisation has made business very difficult for domestically oriented fashion clothing companies. Fashion industry products seem not to give satisfaction to the majority of potential consumers as the industry sets a target standard for beauty, lifestyle and 'must have' items. These generalised standards have been making consumers feel excluded. Companies that compete by economy of scale and low prices, do not seem to input properly added value that consumers could appreciate. On the other hand, companies that compete by differentiation often offer the same sort of products with a distinctive portfolio of services.
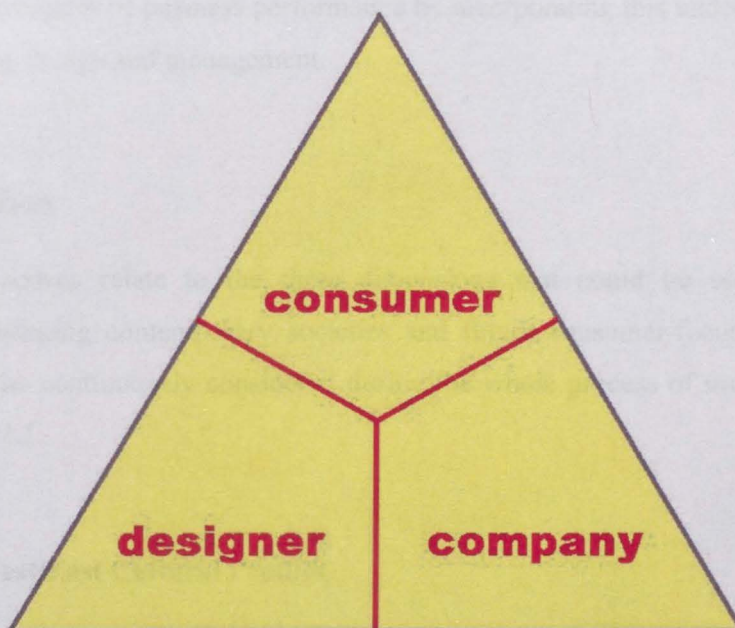
Figure 1.1 – The Three Headings for the Research Questions

These three headings, corresponding to the main stakeholders of the product development processes in fashion clothing are the core targets of this research. Consumers,

Designers and Companies will be extensively investigated and their actions are the guide for the aims and objectives of the research stated in the next section.

1.3   AIMS AND OBJECTIVES OF THE RESEARCH

Consumers, Designers and Companies lead the aims and objectives of the research. It is true that behind the pursuit of consumer satisfaction, design innovation and company profitability there are a lot of factors involved. Considering this, the overall aim of this research and the specific objectives are stated below.

1.3.1 Aims

The study aims to identify core elements necessary to be considered in fashion clothing product development, taking into account the considerations of consumers, designers and companies. In addition, it aims to evaluate how these elements may vary in three separate markets: UK as a mature Western society, Brazil as an emergent Western society and China as an emergent Eastern society. Moreover, an overall aim of the research is to provide for designers and companies a means of understanding their approaches and evaluating how effectively they are catering for the needs of consumers in various markets. The objective for them is the improvement of business performance by incorporating this understanding into their strategic planning, design and management.

1.3.2 Objectives

The objectives relate to the three dimensions that could be seen as relevant to understanding changing contemporary societies and future consumer-focused studies. These dimensions will be continuously considered during the whole process of investigation and are shown in Figure 2.1.

Dimension 1: West/East Cultural Profiles

- To compare UK, Brazil and China's socio-cultural and demographic consumer distinctions in accordance with their profiles and needs.

- To investigate the degree of importance physical characteristics may have in consumption choices for fashion clothing products.

- To develop knowledge of the nature of consumer cultural preferences and their impact on fashion clothing products.

Dimension 2: Local/Global Influences/Competitive Strategies

- To improve the decision-making strategies of fashion companies competing in global markets.

- To enable designers and companies to deal with local specificities in new markets.

- To strengthen the marketing policies that support focused promotion and advertising campaigns, together with the design concept and strategic management.

Dimension 3: Mature/Emergent Markets

- To compare the degree of consumer demand mature and emergent markets have in relation to fashion clothing products.

- To develop better benchmarking tools to identify core and focused product attributes, consequences and values, and from that improve consumer satisfaction.

- To recommend future curriculum and pedagogic practices to enable a new generation of fashion designers to succeed in their field, considering more market distinctions.
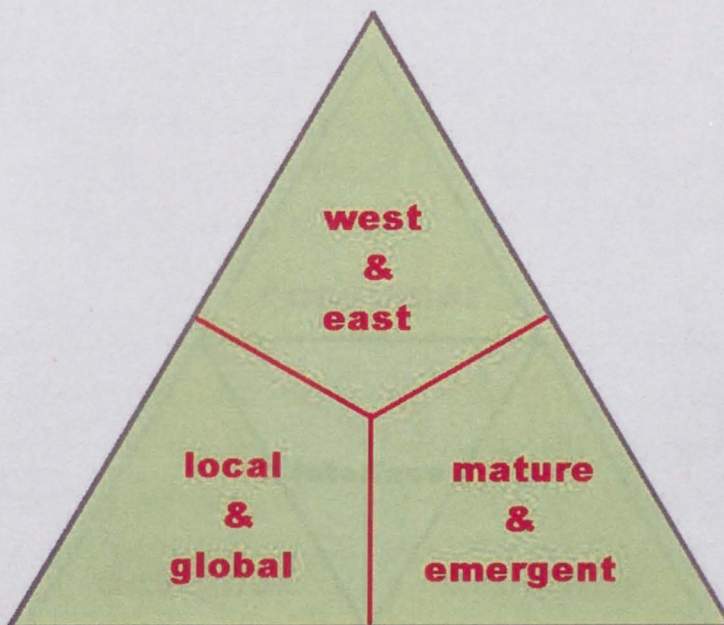
Figure 1.2 – The Three Dimensions for the Research Objectives

The dimensions selected to act as layers in the analyses are justified by the specificities of the targeted markets. Besides, the current changes in the economy and environment, especially within the fashion and clothing industries, were also a part of the motivation to consider Western and Eastern cultures, Global and Local environments, and Mature and Emergent markets. The next section considers further the reasons for this research.

1.4 RATIONALE OF STUDY

There are currently a limited number of studies and research projects that address the complex and diverse relationships that exist between the consumer, the designer and the company. These three should be acting in a coordinated manner in order to achieve higher levels of compatibility and synergy.

Fashion clothing products can lead to better quality of life for consumers, creative opportunities for the designers and business openings for the management of companies. The level of complaints from consumers does imply that there is a gap between what the consumer wants and what the company is offering.

This study is important in beginning to identify and understand these complex elements, building tools to help in innovating products in a more systematic manner, and improving the interface between the stakeholders (Figure 1.3).
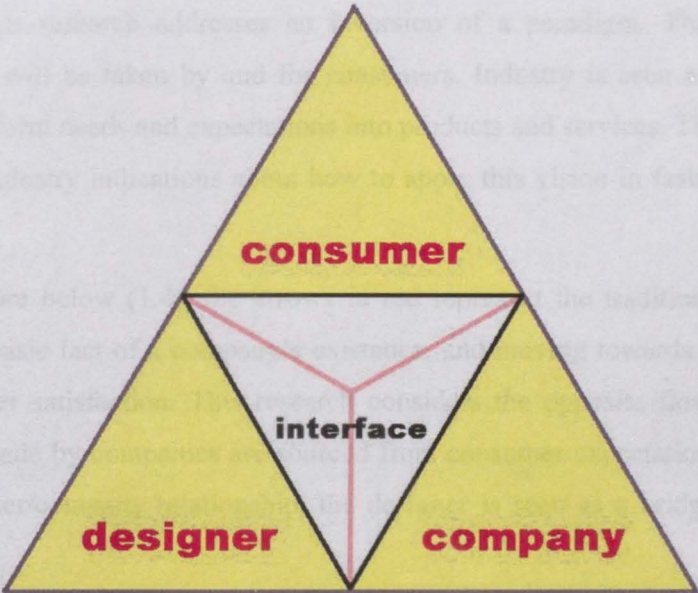
Figure 1.3 – The Three Stakeholders and the Interface

It is true that the three stakeholders selected have distinct interests in the fashion clothing product development process, but it is also true that they should have some affinity and harmony.

It seems to be worthwhile to adopt a consumer viewpoint for this research, due to the nature of the process: without consumers, designers and companies have no reason to exist. This conceptual approach is explained further in the following section, where the research methodology is introduced.

1.5 RESEARCH METHODOLOGY

The ontological approach adopted by this research has been based on the belief that the findings could help consumers and support society to act in a more human-led manner. The research takes into consideration society's dynamic nature and the implications for how consumers socialise through what they wear. There is growing interest in improving our social responsibility, developing inclusive policies, and in ethical trading practices.

This way of seeing society is not new. The industry commitment to put the consumer at the forefront of their decisions is largely explained at a strategic management and marketing level. Even though the approach is not unique, it is not easy to find literature about how to put it into practice, especially due to a lack of indicators and quantifiers.

In fact, this research addresses an inversion of a paradigm. The industry decision making processes will be taken by and for consumers. Industry is seen as the means to get, translate and transform needs and expectations into products and services. This work attempts to give the fashion industry indications about how to apply this vision in fashion clothing design and consumption.

In the figure below (1.4), the arrows in red represent the traditional flow of actions, starting from the basic fact of a company's existence, and moving towards the ultimate aim of providing consumer satisfaction. This research considers the opposite flow (in blue arrows), where decisions made by companies are sourced from consumer expectations. In both ways of seeing the consumer/company relationship, the designer is seen as a bridge between the two sides.
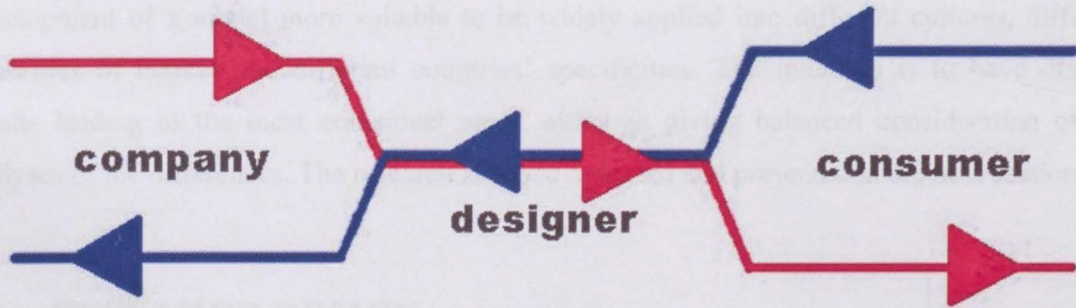
Figure 1.4 – The Distinct Flow of Actions

In addition, the critical postmodern perspective adopted is related to achieving an optimum balance between the three stakeholders, the consumer, the designer and the company. The researcher acknowledges that there is a dialectic relationship between the three stakeholders, as it is not possible to make changes in one without affecting the others. Consumers are known to want to receive the maximum value for minimum cost. Designers are known to want a high profile conceptual outcome rather than dealing with commercial and production constraints. Companies are known to limit the product offer and at the same time want high commercial returns.

It is true that a there is a fourth stakeholder that is indirectly benefited by this research: the marketer. In this research, the market area is considered inside the business, or the company side as the literature related to this area is vast and abundant. The approaches that have been taken by managers, marketers and designers are slightly different as regards their relationship to consumers. The managers, responsible for the financial health of the company have the role of making sure that products exist and are sold. The marketers should understand consumers' behaviour and find out how to stimulate sales. On the other hand, the commitment of designers to consumers seems to be related to usability and aesthetic issues.

The adoption of qualitative, quantitative and quali-quantitative methods in the development of this research was in order to offer an appropriate combination of different research methods to achieve the expected results, and to study the reality of the fashion industry. The data has been provided by surveys, questionnaires and interviews and were treated in different ways and based on different theories in order to extract the common *indicators*.

In fact, the common *indicators* summarize real consumer behaviour, based on diverse fields of knowledge, and ensure a composite theoretical view of consumption, that can be applied by designers and companies in their product development processes.

The decision to study three very diverse markets was made in order to contribute to the development of a model more suitable to be widely applied into different cultures, different maturities of market and different countries' specificities. The intention is to have distinct results leading to the most coincident areas, although giving balanced consideration of the analyses of the differences. The research is hence designed and presented in the next section.

1.6   RESEARCH DESIGN

The research design has been developed from the research objectives that explore the three dimensions of West/East; local/global; and emergent/mature markets (Figure 1.2).

The basis for analysis has been derived from the literature review that will be introduced in the subsequent Chapter 2 that outlines the key concepts for fashion and clothing. Three of the concepts are directly related to consumers, three to designers and three to companies (Figure 1.5).

- Consumers have been investigated through the use of theoretical frameworks on needs, motives, and pleasures. The literature explored is related mainly to culture, communication and consumption.

- Designers have been investigated through artist, brand and product focus. The main subjects of literature reviewed are clothing, design and art.

- Companies have been investigated through market, strategy and value. The theories discussed in the literature are linked to manufacturing, marketing and business fields.
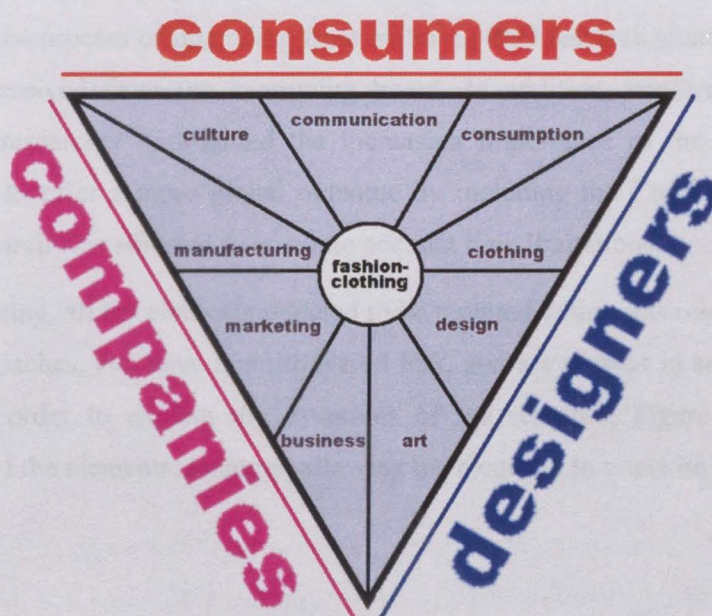
Figure 1.5 – The Literature Review Approaches

Chapter 3 explains in more detail the research methods and instruments used in the data gathering stage, and the analytical methods of the study. To investigate the global dimension, three countries, the UK, Brazil and China, have been selected as case studies to represent the mature and emerging market perspectives (Figure 1.6).
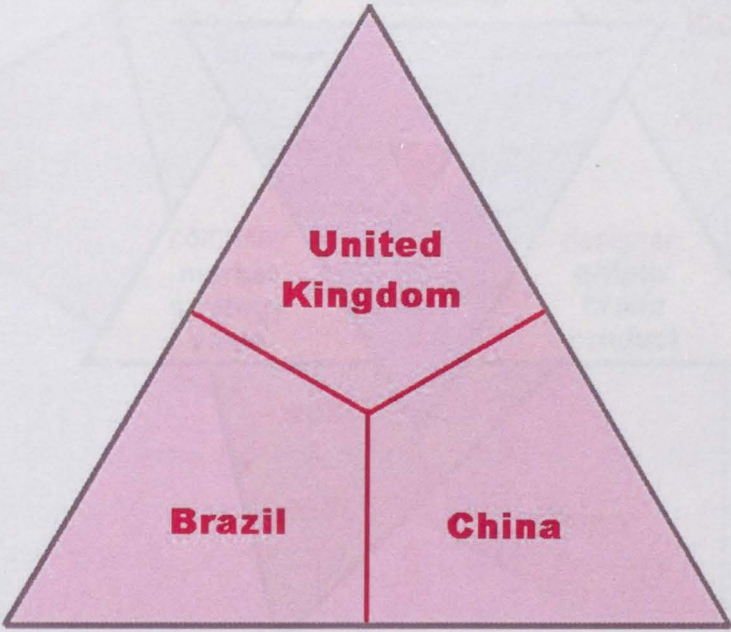
Figure 1.6 – The Three Targeted Markets

It is important to highlight that in the early stages of the research a Chinese analysis was not planned. The original project included a comparison between only UK and Brazilian markets. During the process of upgrading from MPhil to PhD research some suggestions in this direction were received from the examining board. In addition, conferences and seminars attended by the researcher highlighted the increasing importance of the Far-East consumer market. In order to offer a more global outcome by including the Chinese investigation, the design of the research was adjusted to take into account time limitations.

Summarizing, all the elements selected to be targeted within this research: stakeholders, dimensions, approaches, etc. have a multilayered link, and are present in several phases of the investigation. In order to explain the dynamics of the research, Figure 1.7 illustrates the superimposition of the elements, although allowing the elements to rotate on its axis.
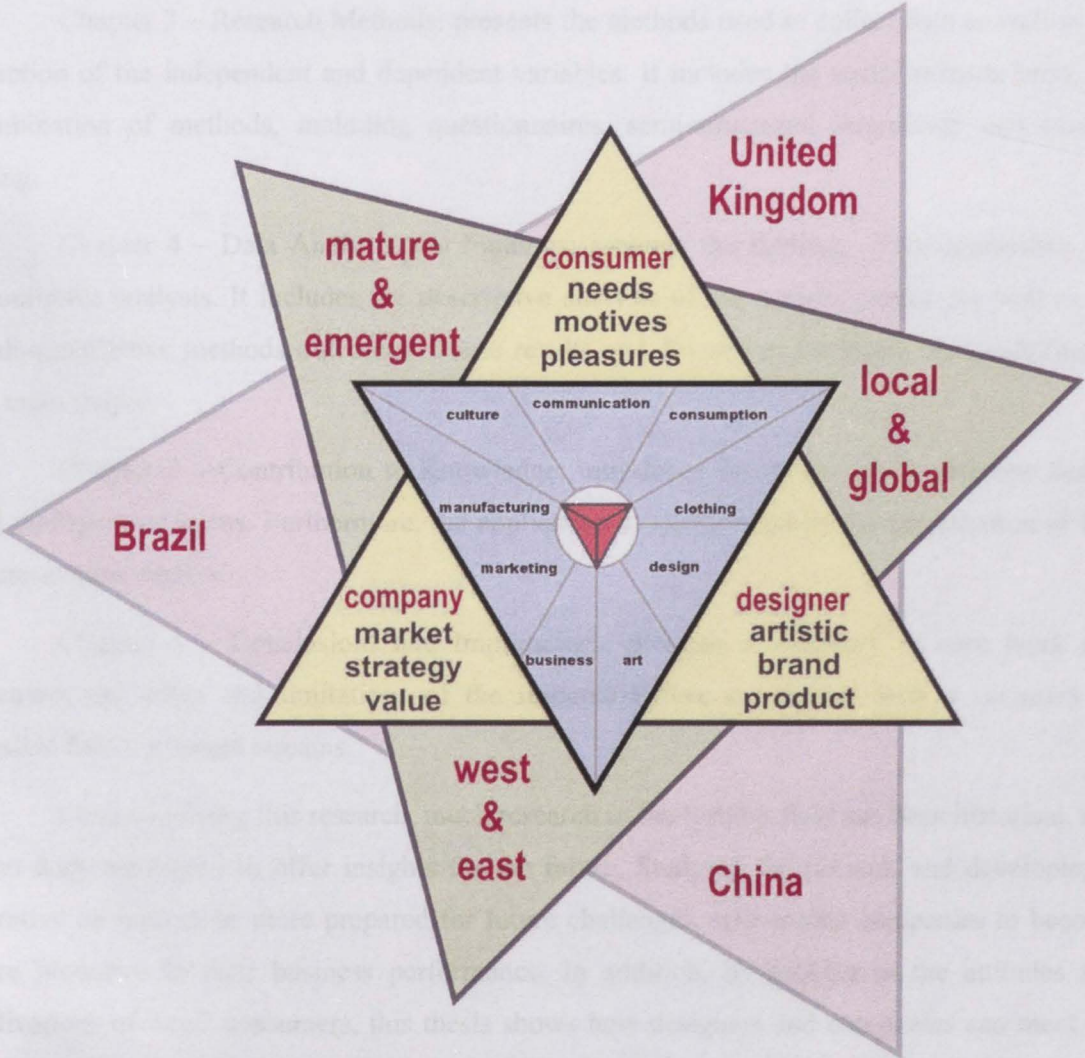
Figure 1.7 – The Research Design

The investigation took place considering the blend of concepts and methods, always having the research questions in mind to be answered. In order to better explain phases, methods and levels of outcomes acquired, the thesis structure is detailed in the next section.

1.7   STRUCTURE OF THE THESIS

The thesis is structured in six chapters as follows:

Chapter 1 – Introduction: presents the motivation for the research and context, and details research methodology and structure.

Chapter 2 – Literature Review: reviews relevant literature within the key concepts for fashion linked with the nine elected approaches, introduces the focus development related to the three dimensions of the research questions, as well as presenting information about the three targeted countries.

Chapter 3 – Research Methods: presents the methods used to collect data as well as the selection of the independent and dependent variables. It includes the social science basis, the combination of methods, including questionnaires, semi-structured interviews, and sample sizing.

Chapter 4 – Data Analysis and Findings: presents the findings of the qualitative and quantitative analysis. It includes the descriptive analysis of the sample profiles as well as the quali-quantitative methods outcomes. These results and discussion facilitates the modelling of the main output.

Chapter 5 – Contribution to Knowledge: introduces the model which supports design and management teams. Furthermore, the application is exemplified by the presentation of five fictitious case studies.

Chapter 6 – Conclusions and Implications: presents a summary of core work and discusses the value and limitations of the research before concluding with a summary of possible future research streams.

Contextualising this research, much research in the fashion field has been historical, and often does not intend to offer insights for the future. Studying the present, and developing a narrative on how to be more prepared for future challenges, will enable companies to become more proactive in their business performance. In addition, by looking at the attitudes and motivations of 'real' consumers, this thesis shows how designers and companies can meet the needs of a large section of the market that is currently neglected and under exploited.

The next chapter brings to the reader the key theories and approaches this research considered and upon which it is based.

CHAPTER 2 – LITERATURE REVIEW

This chapter presents both the theoretical background to this research and a review of relevant literature. The chapter is divided into sections and subsections to facilitate understanding of a diversity of points of view from different fields. The aim of the chapter is to promote a discussion using an interdisciplinary approach.

The first section (2.1) presents a number of relationships between fashion and a diversity of different knowledge fields. The intention of this is to introduce the reader to a multidisciplinary approach to thinking about fashion and clothing issues.

The second section (2.2) explains the approaches adopted in the analysis of this work. This section supports understanding of the fashion system from a holistic perspective.

The third part (section 2.3) introduces some key information about the fashion industries of the three countries chosen for this research. The fourth and last section (2.4) attempts to summarize the issues discussed in the chapter.

2.1   FASHION AND CLOTHING DEFINITIONS

There is no unanimity about a definition of fashion. Throughout history, fashion has been regarded with a great deal of prejudice from government and other authorities (Barnard, 2002).

According to Lauwaert (2006), 'clothing does not represent, it presents. Clothing does not define, it positions. Clothing is pragmatic, not semantic. Clothing does not lie, but irrevocably betrays you.' (p.17).

Hoeks and Post (2006) say that the complementary aspect of fashion and clothing is clear from season to season: fashion is always in fashion and the only thing that changes is clothing. According to the authors, while the clothing industry is selling products, the fashion industry is not selling objects but meanings. That is the way the consumer's desires have been fulfilled.

At the same time, fashion and clothing are the 'most fetishised commodities produced and consumed within capitalist society. …Fashion and clothing may be the most significant ways in which social relations between people are constructed, experienced and understood.' (Barnard, 2002, pp.8-9).

People (consumers) have a need to be both social and individual simultaneously, and fashion and clothing seem to be a good way to negotiate this complexity. Fields such as aesthetics, social sciences, cultural studies, psychology, production, design, economics, management, marketing and communication all have some relationship to fashion and clothing at every level.

As fashion and clothing encompass a diversity of disciplines, each discipline should be considered when analysing fashion and clothing. In addition, each discipline attempts to find a specific way to explain fashion and clothing, using precise terms and analyses. The challenge is to blend all this as the consumer normally sees and experiences all of these concepts together. Considering this, the concept of *Complex Thought* developed by Morin (2003) seems to be an appropriate basis for consideration of this development.

Morin (2000) explained that scientific knowledge, for methodological reasons, is fragmented. These divisions evolved to facilitate deep understanding of phenomena, but the western and scientific way of thinking has taught researchers to separate fields, and there is a lack of movement to re-engage these fields with each other. The author claimed that separated 'things' are both linked and distinct and necessary for the development of society.

Individuals, societies and all 'specimens' are distinct entities, and they cannot be split due to their co-operative role in the understanding of humanity. Hence, *Complex Thought* is based on distinction (not separation) and liaison. It is not comprised only of science, or just philosophy, but allows for communication between them, acting as a bridge. The paradigm of complexity should be considered as one that joins while it distinguishes.

Following the *Complex Thought* approach, a diagram was designed in order to identify some of the factors that turn fashion into a subject of current complexity. Figure 2.1 presents a set of issues such as product life cycle, environment, individuality, psychology, physical adequacy and strategy to influence or promote consumer satisfaction.

The Fashion System is based on stages of diffusion that are influenced by the local and global cultures and environments. The act of consumption is comprised of seven phases that are affected by Environmental Influences and Individual Differences.

Frequently, fashion consumption is divided into two distinct 'universes': firstly what might be called 'trends', 'style' or 'vogue', and secondly clothing. The former is more likely to receive attention from the fields of Psychology, Sociology and Anthropology. The latter is analysed more fully through Ergonomics, Anthropometrics and Human Physiology.

It is the coming together of Trends and Clothing that creates the fashion clothing product that this research refers to. Moreover, this research considers the relations between the stakeholders and the product designed as the core object of study. This approach enables business to be added to the equation, enhancing the complexity of the understanding of consumption.

The consumption cycle, when finished, will generate satisfaction or dissatisfaction from the consumer, and this result will influence the forthcoming cycles of consumption, in a continuous cycle of development.
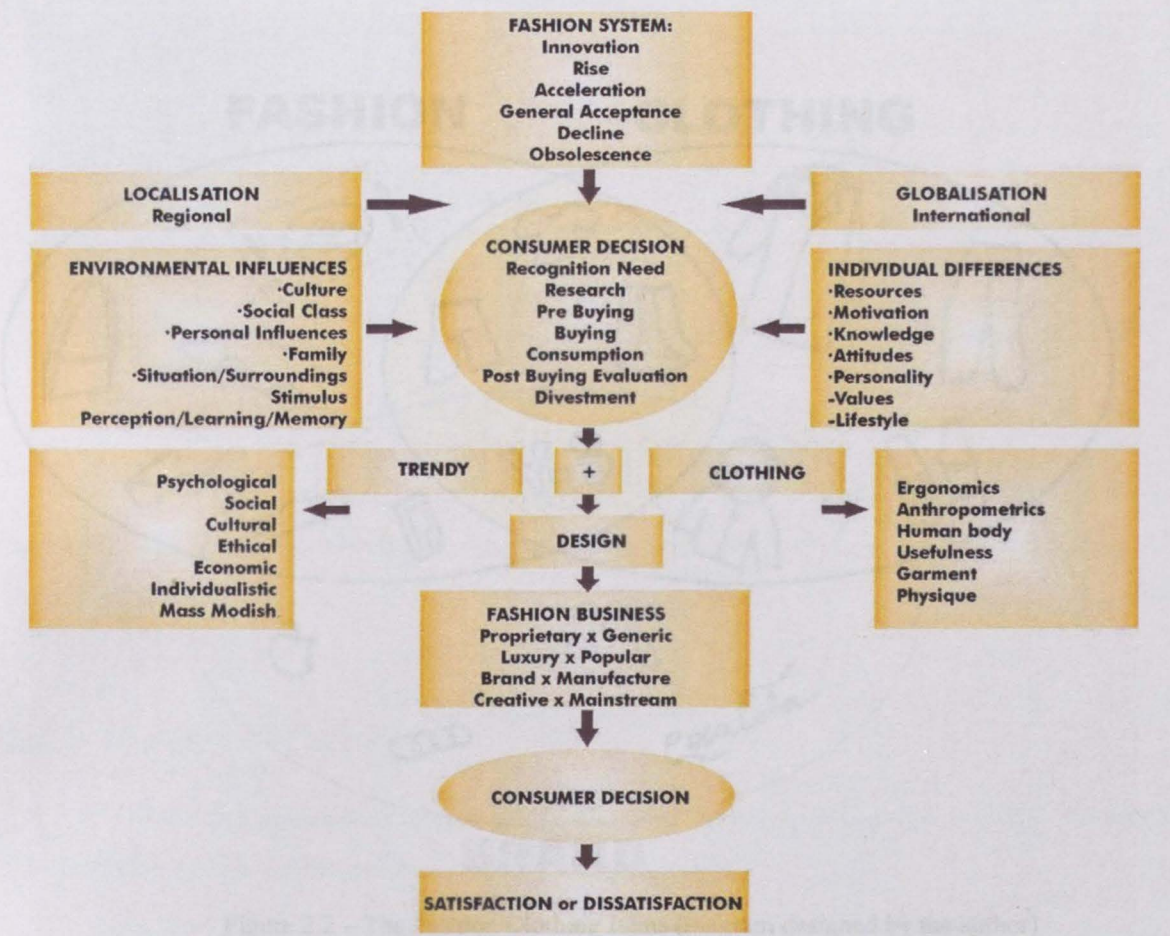
Figure 2.1 – The Complexity of Fashion (diagram designed by the author)

All of the elements present in Figure 2.1 were extracted from theories or an insight from an existing theory. The theories used to build the diagram displayed above are fully presented in the next section of this chapter. As these theories come from very diverse fields, they are classified into key areas of investigation that comprise the Fashion System diagram.

2.2   KEY CONCEPTS FOR FASHION

Quoting Barnard (2002), this thesis is about 'all these things: it is about fashion, clothing, dress, adornment and style.' (p.9). As explained, the reader will find in this section some concepts that can clarify the complexity of fashion. This study was strategically designed to provide input towards a holistic way of viewing fashion.

For methodological reasons and respecting the aims of the research, all explanations related to fashion products refer to fashion clothing items as opposed to accessories, shoes, bags, furniture, cars, etc. Figure 2.2 below, illustrates the area of products that this research investigates (in yellow).

FASHION   CLOTHING

BRAND

Figure 2.2 – The Fashion Clothing Items (diagram designed by the author)

It is important to say that fashion has a very complex system of relationships. Fashion theory, as a field of research, is immensely relevant, but not explored enough to fulfil all the directions in which it has evolved. For that reason, the subjects in the following subsections will be presented separately. Some established theories will be discussed, putting them in the context of this research (see Table 2.1).

The first three subsections are dedicated to the relationships between Fashion & Culture (2.2.1); Fashion & Communication (2.2.2) and Fashion & Consumption (2.2.3). They are the subjects that have a very close direct link with consumers.

18

The second three subsections discuss issues related to Fashion & Clothing (2.2.4); Fashion & Design (2.2.5) and Fashion & Art (2.2.6). These areas have a very straightforward relationship with designers' practices, although they can influence consumers as well.

The last three subsections relate to the relationships between Fashion & Marketing (2.2.7), Fashion & Business (2.2.8) and Fashion & Manufacturing (2.2.9). These elements have a major impact on companies.

Table 2.1 – Links between Stakeholders and Fields of Knowledge

		consumers	designers	companies
2.2.1	Fashion & Culture	Crucially important	Very important	
2.2.2	Fashion & Communication	Crucially important	Very important	
2.2.3	Fashion & Consumption	Crucially important	Very important	
2.2.4	Fashion & Clothing	Very important	Crucially important	Important
2.2.5	Fashion & Design	Very important	Crucially important	Important
2.2.6	Fashion & Art	Very important	Crucially important	Important
2.2.7	Fashion & Marketing	Important	Very important	Crucially important
2.2.8	Fashion & Business	Important	Very important	Crucially important
2.2.9	Fashion & Manufacturing	Important	Very important	Crucially important

■ Crucially important　　　■ Very important　　　□ Important

The three first themes shown in Table 2.1 are closer to Consumer studies; the three middle themes are more familiar to Design studies and the last three themes are related to studies of company management.

2.2.1 Fashion & Culture

This section is concerned with the contributions that cultural issues make to clothing. The discussion starts with the influence of society on fashion.

The distinction between a leisured and a working class came as a derivation of a division between men's and women's work in the lower stages of barbarism, according to Veblen (1994 *in* Clarke et al., 2003). The ownership of women as trophies was originated by 'the desire of successful men to put their prowess in evidence by exhibiting some durable result of their exploits' (p.233).

Veblen (1994 *in* Clarke et al., 2003) explained that the motive that lies at the root of ownership is emulation: 'the possession of wealth confers honour; it is an invidious distinction.' (p.234). According to Veblen, an invidious comparison is 'a process of valuation of persons in respect of worth' (p.237).

19

The structure of the social world is defined by Bourdieu (1986 *in* Clarke et al., 2003) as pairs of antagonistic adjectives commonly used to classify and qualify persons or objects in the most varied areas of practice.

The ultimate opposition between the 'elite' of the dominant and the 'mass' of the dominated, is behind the whole social order. The prevalence of the homogeneous is the undifferentiated threat to the private spaces of exclusiveness.

Commonly, fashion trends are nurtured by the dialectical opposition of what has been diffused in the last season. The phenomena of 'fads' have their place explained when many people adopt the new trend, and the exclusive element of the trend completely disappears. Hence, the fad fades and dies.

Figure 2.3 below shows the fashion cycles developed by Kaiser (1985). It is interesting to note that in fashion, the lifecycle of a product is more related to the number of adopters than the durability of the product itself. On the other hand, clothing (identified as 'classic' by the author) lasts longer than the other two modalities and at the same time is adopted continuously by the highest number of consumers,
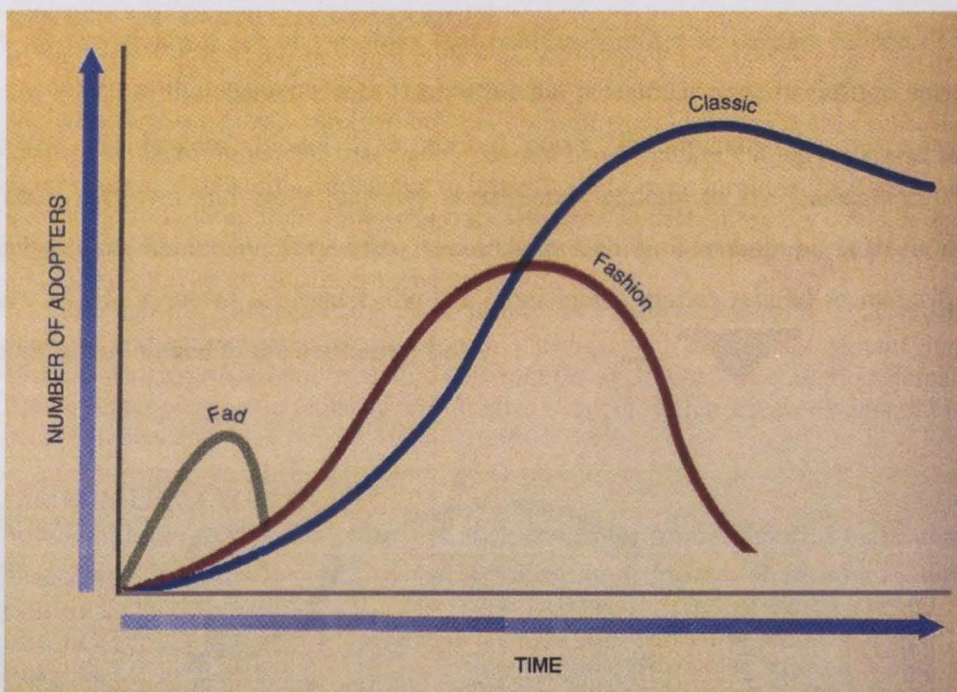
Figure 2.3 – Acceptance Cycles of Fads, Fashions and Classics

In her work, Kaiser (1985) also explained how the process of adoption occurs inside each of the categories; from introduction stages to regression stages in what she called a fashion cycle. The interval of time between the innovation and the obsolescence stage is the one which characterises fads, fashions and classics (Figure 2.4).

It is important to note that in the literature it is less common to find studies about the acceptance stages of Classics than the similar phases within Fashion and Fads. However, the number of adopters of Classics is much greater than within the Fashion and Fads cycles.
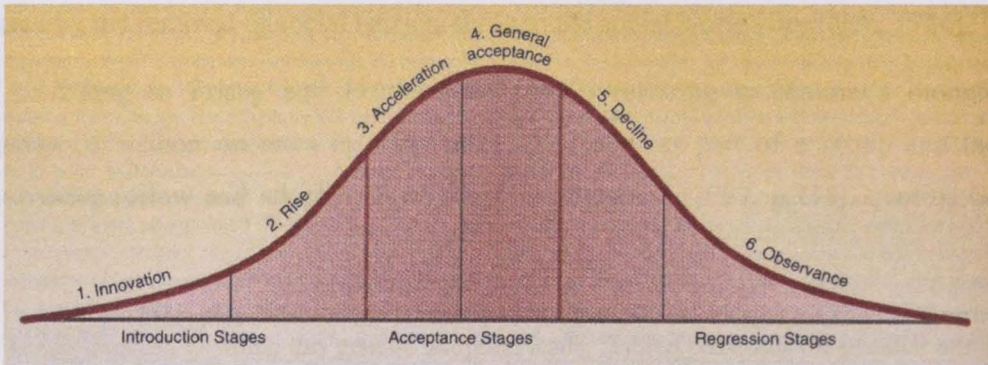
Figure 2.4 – The Fashion Cycle

In an attempt to explain better the phenomena of fashion adoption, another study that corroborates Kaiser's work is Rogers' model of innovation adoption (1983). The author classified the consumer population into five groups (Figure 2.5), according to their acceptance of a new product: innovators, early adopters, early majority, late majority and laggards.

Each consumer has a set of variables that enables him/her to be part of one of these groups. Culture is one of the characteristics that define the individual stage of fashion adoption. Considering that the Rogers' model is a normal curve, theoretically the percentage of innovators, early adopters and early majority corresponds exactly to the percentage of late majority and laggards. Curiously, very often, research in fashion consumption is dedicated to the first stages of life cycle of a product. On the other hand, studies related to maturity and decline of adoption are linked to the marketing field.
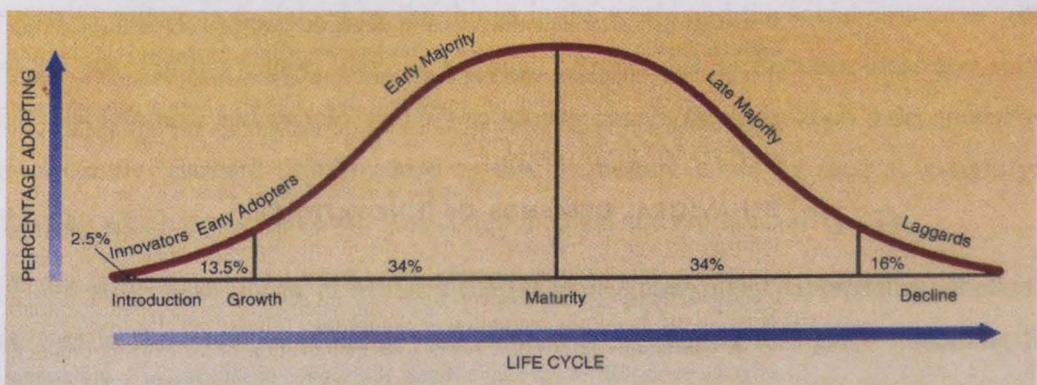
Figure 2.5 – Types of Adopters

Additionally, there are the phenomena of social class and status that also influence fashion. The term class is as much a matter of perception as of reality. Individual or collective classifications are involved in a system of dynamic inter-dependence in the class structure and are affected by the removal of social barriers through the social world (Bourdieu, 1986).

According to Frisby and Featherstone (1997) referring to Simmel's thoughts, the phenomenon of fashion operates in a dynamic sense only as part of a group and the great majority merely follow and adopt it. Frisby and Featherstone (1997, p.238), quoting Simmel, explain:

> By reason of this play between the tendency towards universal acceptance and the destruction of its significance, to which this general adoption leads, fashion possesses the peculiar attraction of limitation, the attraction of a simultaneous beginning and end, the charm of newness and simultaneously of transitoriness. Fashion's question is not that of being, but rather it is simultaneously being and non-being; it always stands on the watershed of the past and the future and, as a result, conveys to us, at least while it is at its height, a stronger sense of the present than do most other phenomena.

According to Frisby and Featherstone, (1997) Simmel developed this idea further: after the French Revolution and the rise of the third estate (commonality) to power, fashion became more animated and broadened its limits. 'Classes and individuals who demand constant change – because precisely the rapidity of their development secures them an advantage over others – find in fashion something that keeps pace with their own inner impulses.' (p.244)

Returning to the definition of the word 'culture', Williams (1988) relates it to the 'process of human development'. Considering this process as dynamic, Williams (1988) describes fashion as a perpetual cycle, an endless process of innovation.

As fashion and clothing are not used only to indicate social and cultural positions, the concept of material culture seems to be a necessary part of this discussion. According to Dant (1999) material culture is explained by the things in the world and the social structures within which we all live. For the author, 'there is a system of relationships between ideas and values, material things (clothes) and people' (p.107) as society cannot be understood independently of its material culture. Barnard (2002) added to this: '…culture could be seen as a signifying system through which that social order was communicated and reproduced' (p.41).

There is much criticism in Miller's (2005) work about many 'approaches labelled as "semiotic"' as in these studies clothing was reduced to 'its ability to signify something that seems more real – society or social relations – as though these things exist above or prior to their own materiality' (p.2).

In summary, a fashion phenomenon is directly linked with a cycle of adoption and human development. Moreover, the intensity of adoption is related to the social relations the adopters build with their material things. The subsequent point of discussion between adopters and things is related to the meanings in this relationship. The next subsection is dedicated to this issue.

2.2.2 *Fashion & Communication*

This subsection discusses the links between fashion and communication. Moreover, these relations present meanings and the discussion of how fashion and clothing products can embody meaning to the sender and receiver of the message is also discussed. The following paragraphs show selected theories and thoughts that helped in the development of this research.

Fashion and clothing are non-verbal forms of communication (Barnard, 2002, p.29). According to Lurie (2000), there are many different languages of dress, each with a distinct vocabulary and grammar: clothes are the equivalent of words and may be combined to form 'sentences'.

Rouse (1989), who, like other authors, agrees that garments refer to protection, modesty and attraction, also includes communication as a major function of clothing.

One way to explain this phenomenon is by considering a garment as a medium or a channel by which one person would 'say' something to another person, with the intention of affecting some change in that other person (Barnard, 2002). The message is the sender's intention and it is this that is transmitted by the garment in the communication process. The important stages in this process of communication are: the sender's intention; the efficiency of the transmission process and the effect on the receiver.

Barnard (2002) also explained that this explanation is not enough to explain the phenomenon of communication through clothes. The first question is related to the identity of the sender: who is the sender of the message? Although common sense would suggest that is the user of the garment, the designer could claim that s/he sent the message. The controversial answer that user and designer are co-senders is not a sufficient explanation and Barnard (2002) introduces the concept of semiotics to try to find a better explanation of the phenomenon. Quoting Fiske (1989), he writes: 'semiotic… defines social interaction as that which constitutes the individual as a member of a particular culture or society' (pp.2-3).

Adding Douglas and Isherwood's work (1979) to the analysis, Barnard (2002) says that the real communicative phenomenon is to make sense of the world and the things through the people in it. Moreover, the structured system of meanings - a culture - enables individuals to construct an identity by means of communication.

23

In this way, communication by semiotics is more effective in the production and exchange of meanings than anything else. The role of the sender becomes less important than the production of the meaning. Moreover, if the production of meaning is a result of negotiation between sender and receiver, their different cultural experiences may produce different meanings. As a consequence, in as far as meanings are generated, the process of communication establishes positions of relative power.

It is helpful to note Saussure (1974), whose *Course in General Linguistics* defines semiology as 'a science that studies the life of signs within society' (p.16). For the author, the sign is comprised of two parts: the signifier (the physical part of the sign) and the signified (the mental concept to which that signifier refers).

According to Saussure (1974), there are two ways that a sign can differ: the syntagmatic difference and the paradigmatic difference. The syntagmatic difference is related to the order of the signs, its position before or after one other and the paradigmatic difference is allied to the replacement of one sign by another. A figurative explanation of this concept can be related to clothes: the sequence of garments when dressing (underwear, top and bottoms, coat) and the style of the garments everyone chooses to wear. The syntagm is the sequence of layers involving the body and the paradigm is the set of options available in, for instance, underwear.

Barthes, in *The Fashion System* (1990) introduced the concept of a vestimentary code, the rules for an acceptable way of wearing clothes in society. The author also discussed the manner in which fashion magazines communicate this code, adding their vision of the world and their ideology. The most utilitarian objects such as food, clothing and shelter that have been used by the press and the advertising industries stimulate researchers to semiological analysis.

In investigating fashion products, it is important to understand the meanings a product can carry. In addition, it is important to know that the message emitted by the same product can vary depending on the user, the viewer and the environment. One more issue is crucial to the understanding of fashion products by consumers: the next subsection introduces the phases of the consumer decision-making processes.

2.2.3 *Fashion & Consumption*

One of the reasons for the existence of fashion is the consumption process. This subsection will discuss key theories related to consumer behaviour in order to sustain further stages of this research.

A person consumes any good or service when they are motivated, and his/her behaviour is connected to a desired goal. The biggest challenge for companies is to discover the primary influences of this motivation and to plan strategies to activate and satisfy this necessity.

24

For Blackwell et al. (2002) the consumption motivational process is initiated with the recognition of need. This need is felt when there is enough discrepancy between the desired state and the current state of the human being.

The 'need feeling' may be activated in different ways, from the entirely physiological to the completely psychological. Consumption 'necessity' can be classified in two different groups: (1) utilitarian necessities, in which are considered the objective and functional attributes or benefits of a product or service, and (2) hedonistic necessities that include subjective answers, pleasures, dreams and aesthetic considerations. However, in general, utilitarian and hedonistic necessities, appear simultaneously in a decision regarding consumption.

According to Blackwell et al. (2002), the evaluation process of a consumer is composed of seven distinct stages: (1) Recognition of Need, (2) Search, (3) Pre-Buying, (4) Buying, (5) Consumption, (6) Post-Buying Evaluation and (7) Divestment. The process can be better visualised in Figure 2.6 below.
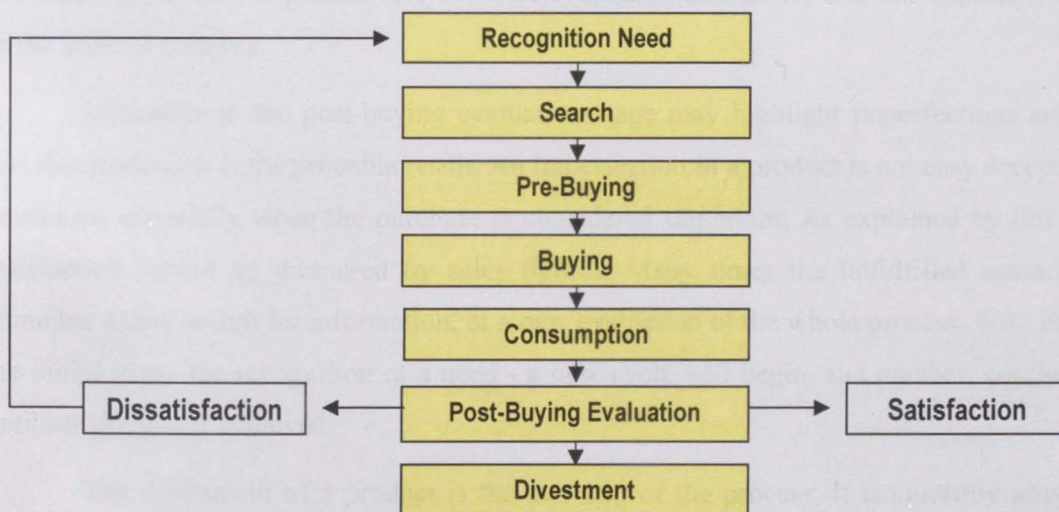
Figure 2.6 – The Consumer Decision Process Model

The recognition of need is the initial step of the *Consumer Evaluation Process*. It occurs when a person compares his/her current state in relation to an ideal product or service offer. This *Consumer Evaluation Process* might incorporate individual influences from the environment and social difference.

The search is the following stage, where the consumer searches in his/her memory (an internal look) for solutions to supply the perceived need. This stage may also consider external information from a diversity of sources, e.g. advertising, window-shopping, news, friends' comments, etc.

At the pre-buying stage the consumer examines the attributes offered by a product or a service and compares them with his/her expected models and specifications. This process uses evaluation criteria to compare different brands and solutions.

The purchase is the next step. This stage does not have any deliberation or evaluation of a product or a service, as the consumer has already made his/her choice.

During the period of consumption or use the consumer is really satisfying his/her need. Although this is the core of the process, many marketing professionals do not recognize its importance. The consumption stage is the one where consumers can actually test, judge and approve design features.

The degree of consumer satisfaction is defined during the evaluation post-buying. The consumer's comments are valuable for designers and companies. What did the consumer like most about that product? What suggestions would he/she give to modify/improve the product? Have his/her expectations been fulfilled? If they have been, and the product gave satisfaction, this fact will have an important role in future evaluation and choice and this experience is kept in the internal memory.

Hesitation at the post-buying evaluation stage may highlight imperfections and mean that dissatisfaction is the probable result. An imperfection in a product is not easy accepted by a consumer, especially when the purchase is considered important. As explained by this model, satisfaction cannot be measured by sales figures. Many times the unfulfilled sensation can stimulate a new search for information, or a new evaluation of the whole process. With regard to the initial step - the recognition of a need - a new cycle will begin, and another, continuously, until satisfaction is achieved.

The divestment of a product is the last step of the process. It is currently growing in importance as environmental and social problems become increasingly important. The popularity of second-hand stores and the recycling process has increased the necessity of considering this stage.

Each stage of the consumer decision-making process has a distinct level of interest for stakeholders. Consumers are interested in satisfying their needs. Companies are aware of the need to know consumer preferences and sell products. Designers have a professional commitment to enhance the quality of life for users.

Press and Cooper (2003) addressed this issue, as can be seen in Figure 2.7 below. The authors explain the relationship between the product life cycle (yellow rectangles) and design responsibility (green rectangles). A comparative analysis was carried out with regard to the level of socio-environmental responsibility a designer should show in a product's development.
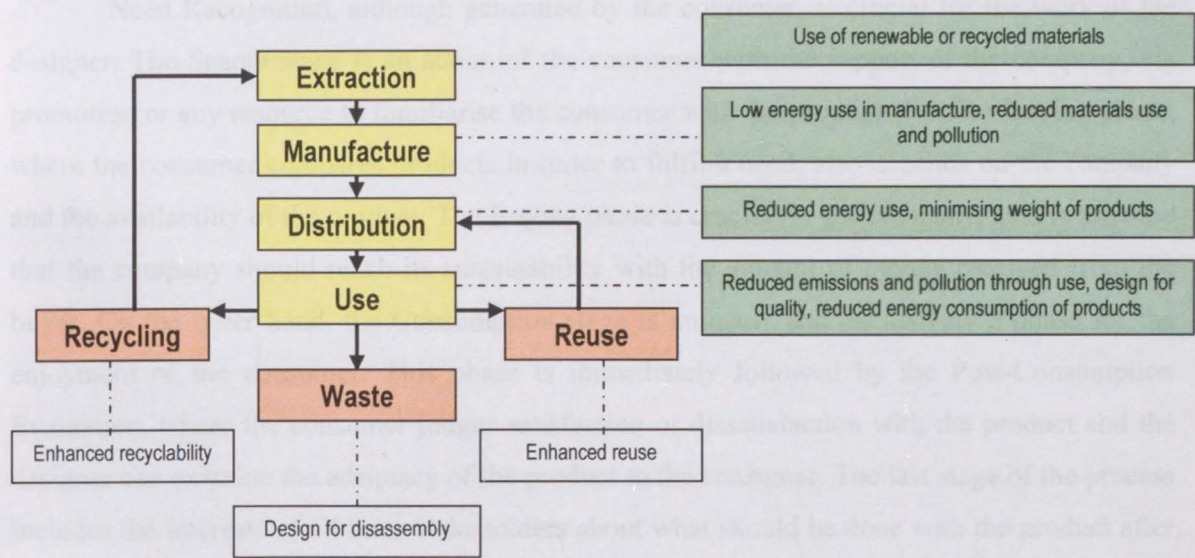
Figure 2.7 - Design Issues within a Product Life Cycle Analysis (adapted)

The Press and Cooper model (2003) shown above is simpler than the Blackwell et al. one, and it also brings the designer closer to the consumer (user). Moreover, the company also needs to be involved into the consumer decision process. Hence, considering the Consumer Decision Making Process outlined by Blackwell et al. (2002), Figure 2.8 presents a comparative analysis of the primary interest of each stakeholder within the seven stages of the model.
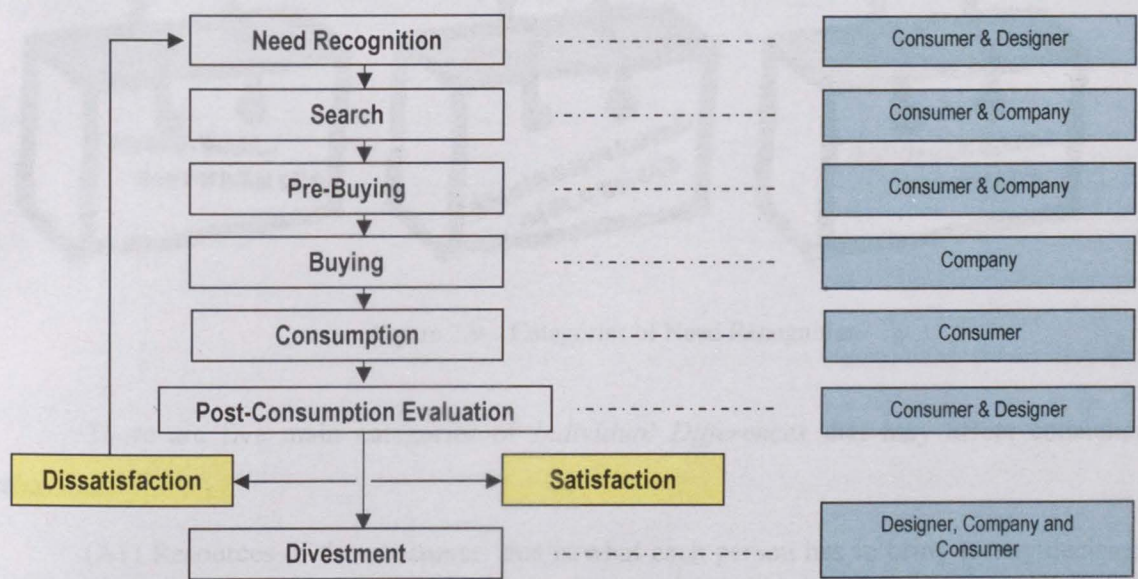
Figure 2.8 - Stakeholder Issues within the Consumer Decision Making Process

Taking into account the definitions of each of the seven stages of the Consumer Decision Making Process previously explained, there are some phases which are more important for each of the three stakeholders considered by this research.

Need Recognition, although generated by the consumer, is crucial for the work of the designer. The Search stage is an action of the consumer with the support of the company, via promotion or any resource to familiarise the consumer with the product. The Pre-Buying phase, where the consumer compares products in order to fulfil a need, also depends on the company and the availability of the product. The Buying phase is crucial for the company, as it is the time that the company should reach its sustainability with the amount of money received from the buyer. On the other hand, the Consumption stage is uniquely and exclusively a phase for the enjoyment of the consumer. This phase is immediately followed by the Post-Consumption Evaluation, where the consumer judges satisfaction or dissatisfaction with the product and the designer can examine the adequacy of the product to the consumer. The last stage of the process includes the interests of all three stakeholders about what should be done with the product after the need is or is not satisfied.

As each stage of the Consumer Decision Making Process denotes further investigation[1], the motivation for the whole process is given by the first of the phases: the Recognition Need.

According to Blackwell et al. (2002), the consumer's decision-making is informed by three categories of recognition of need: (A) Individual Differences, (B) Environmental Influences and (C) Psychological Processes (Figure 2.9).

Figure 2.9 – Categories of Need Recognition

There are five main categories of *Individual Differences* that may affect consumer behaviour:

(A1) Resources of the consumer: this is what each person has to bring to any decision making situation: eg. time, money, reception and the capacity for processing information.

(A2) Knowledge: this is the information stored in a consumer's memory, from availability, to characteristics of products and service, where and when to buy, how to use, etc.

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[1] This research does not examine all the seven phases of the Consumer Decision Making Process.

(A3) Attitudes: behaviour is influenced by attitudes to a brand or product. An attitude is simply a general evaluation of an alternative, classifying it as positive or negative. Once established, the attitude plays a role in future choice and reacts to changes.

(A4) Motivation: in the majority of cases, needs and reasons affect all phases of the decision process.

(A5) Personality, values and lifestyle: known as psychographic research, this characterizes segments of the market through individual treatments, values, creeds and standards of model behaviour.

Consumers live in a complex environment. Their behaviour in the decision making process is modified by the following *Environmental Influences*:

(B1) Culture: this relates to the significant values, ideas, devices and other symbols that assist communication between people and are interpreted and evaluated by members of a society.

(B2) Social class: this means categories of society within which people share similar values, interests and behaviours. This is different from economic status which varies from low to high.

(B3) Personal influence: the consumer, will frequently be affected by other people, mainly through relationships and proximity. This influence takes place when the consumer is involved in a comparative reference group or is susceptible to pressure from others.

(B4) Family: the family is often the primary unit of decision-making, with a changeable and complex model of roles and functions.

(B5) Situation: behaviour tends to change as situations alter. Sometimes these changes are erratic and unexpected, as in a resignation. Other times they can be predicted through previous research and be strategically influenced.

Finally, for a thorough understanding of consumer behaviour it is necessary to comprehend three basic *Psychological Processes*:

(C1) Information processes: communication is the key process in marketing activity. Therefore, it is important for researchers into consumption to analyse how people receive and process marketing communications.

(C2) Learning: influencing consumers involves offering information and changing knowledge and behaviour, especially with products and services acquired by these reflections and evaluation processes.

(C3) Attitude and behavioural changes: changes in attitudes and behaviour are important objectives for marketing; they reflect influences based on psychological aspects that can be used as an effective promotional strategy.

Knowing the variables that can interfere in the Need Recognition phase, as explained above according to Blackwell et al. (2002) is a first step to investigate the reasons why a consumer prefers one specific product in preference to another one. The next subsection introduces the theory of Needs in order to sum up and give support to the investigation of consumer behaviour in fashion clothing products and its variations.

2.2.3.1   *Human Needs*

Many researchers have attempted to classify needs during the last 100 years. But, the most influential, and the one most frequently referred to is the proposal put forward by Abraham Maslow in 1954 in his work *Theory of Human Needs* (Stephens and Heil, 1998).

The *Theory of Human Needs*, defined by Maslow, in the third edition of his work in 1987, relates to a set of necessities that are organised in a hierarchical format of priority of satisfaction for all people. In accordance with this hierarchy, a new necessity is created just after one is fulfilled, even if only partially.

Homeostasis, the automatic function of the human body to maintain stability, is the overriding principle. According to Maslow (1987), this self-regulating property of a system is the main motivator for needs. Each time that an external variable modifies the standard motivational balance, a new condition needs to be satisfied and a new cycle of balancing begins.

According to Maslow, individual behaviour is determined, usually, by the most urgent need. Therefore, it is important to study needs, since these can define a person's individual behaviour.

Maslow's hierarchy theory recognizes five needs: (1) Physiological: associated with the state of being alive, prevention of starvation, freezing, etc.; (2) Safety: linked to the guarantee of being alive; physical risk, freedom from risk, etc.; (3) Social: allied to love and belonging to a social or tribal context; (4) Esteem: affiliated to recognition by a social group and (5) Self actualisation: the subjective need to do your best.

For Maslow, there is a natural order for needs. Initially, the person's only worry is satisfying his/her physiological needs related to the basic necessities of humankind such as: food, shelter and clothing. But when these needs are satisfied, the person feels motivated and makes an effort to satisfy the next necessity in the hierarchy. A model of this hierarchy is presented in the following figure (2.10).

PHYSIOLOGICAL
SAFETY
SOCIAL
ESTEEM
SELF-ACTUALIZATION

Figure 2.10 – Maslow's Human Needs

After satisfying physiological needs, the person will look to satisfy his/her needs for safety. Here, safety relates to freedom from both physical danger and the privation of physiological needs. In a general way, the effort is to ensure the level of need satisfaction achieved previously.

In Maslow's model, when physiological and safety needs are reasonably satisfied, social needs become predominant. Social needs consist of an individual's necessity to participate in social groups, and gain acceptance by the members of these groups.

Then, after satisfying the three previous needs the person will prioritise the realisation of esteem needs. Esteem need incorporates the necessity for recognition and respect from members of his/her groups. These needs also refer to selfishness, the necessity of a personal valuation.

When esteem needs have been satisfied, self-actualisation needs will be prioritised. In this model, self-actualisation needs mean the necessity that each individual has to fulfil his/her potential.

According to Maslow (1987) what a man/woman can be, he/she must be. Thus, this satisfaction relates to the desire of a person to achieve what he/she is truly capable of. This capacity can be presented via diverse forms such as the desire to be a mother, or a top executive, for example.

It is necessary to remember that even Maslow recognizes that this model does not have a universal pattern. Moreover, the author acknowledges that economic and social differences may present variations in relation to the natural order established in the model, due to such characteristics of post-modern society as consumerism, and the resulting importance of social status.

It is important to point out that Maslow is considered by some researchers throughout world to have been a scientist ahead of his time. This can be evidenced by recent publications of his revised works, as well as the numerous studies developed by other researchers that strengthen his theories and prove their present relevance (Stephens and Heil, 1998).

Rowan (1998) comments in the Journal of Humanistic Psychology on the use of the pyramid, not present in Maslow's work, which distorts the original theory, as it shows what Rowan calls the erroneous idea that the end point of personal growth is self-actualisation.

In 1999 Rowan introduced the idea of a hierarchy of needs which does not progress in a linear manner in one direction from the lower levels to the higher levels. Rowan proposed that an abundance of motivation or an absence of motivation splits each need in opposing directions. For Rowan, one of the most interesting of Maslow's ideas is that motivation is guided equally by deficiency and abundance, as a complementary system for the satisfaction of needs. Each person, in theory, may choose between security (to remain in the current level) and growth (to go up a level). This option for change must stimulate the motivation for new necessities, in an ascending or descending direction, which turns the model into one which is both dynamic and continuous.

As Maslow's theory was not specifically conceived to be applied to garments, a specific theory concerning the reasons for the 'human creation' of clothes is described in the next section. The main purpose is firstly to define clothing, followed by an attempt to link motivation to clothes, and subsequently to fashion.

2.2.4 *Fashion & Clothing*

The most direct link fashion has with a product relates to clothing. This section will address important theories about dressing that were selected to support this research. Clothing is an essential item in human life and has an important link with the design professional. In the first subsection the motives for dressing will be discussed and in the second subsection the support of the garment, the human body, will be the key point of discussion.

It is rare to find studies about clothing with relation to fashion. These works are more related to functionality, ergonomics and the special demands of the body.

But, from the consumer's point of view, clothes are the easiest way to represent fashion. In addition, as Lipovetsky (2004) has said, garments are the most popular way for companies to stimulate fashion consumption. Although several works credited seasonality as the main catalyst of garments' short life cycles, the next subsection presents one of the most well known and recognised studies related to the motivation to be dressed.

2.2.4.1   The Motivation for Clothes

As this study is concerned directly with clothing, it is important to introduce the work of Flügel in the 30s. As defined by Flügel, protection, decoration and modesty are the basic, original motivations for the wearing of clothes (Figure 2.11). The way the author discusses the transition from naked to clothed involves a journey from nature to culture (Carter, 2003).

PROTECTION — Against unpleasant sensations related to climate changes and/or strange organisms

MODESTY — The control of physical and psychological characteristics related to the eminence of an individual inside a group

DECORATION — Enhance and differentiate physical appearance and attract the attention of others
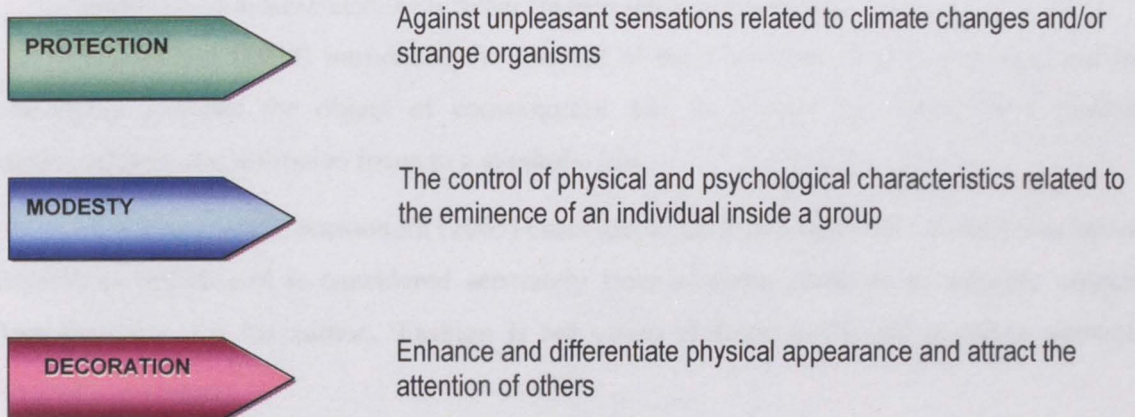
Figure 2.11 – Flügel's Motives

According to Flügel's (1930) concept, the protection of the body against the unpleasant sensations of cold in the prehistoric period, and later, against any elements or organisms harmful to health, is one of the fundamental motives for dressing. Due to scientific developments, ideas on hygiene have changed and clothing tends to have a strong link with both physical and psychological protection. Accordingly, clothes can be used as:

> … a protection against the general unfriendliness of the world as a whole; or, expressed more psychologically, a reassurance against a lack of love. If we are in unfriendly surroundings, whether human or natural, we tend, as it were, to button up, to draw our garments closely round us. (p.77)

Even earlier, in tropical civilisations, the original function of decoration, described by Flügel, is related to its essential purpose of distinguishing physical appearance in order to attract admiring looks from others. The author cited indigenous inhabitants to explain the exhibitionistic natural instincts of mankind. Hence, the work showed some of the contemporary realities of decoration: sexual display, political rivalry, ceremonial costume and social status among others.

The function of modesty, according to Flügel (1930), is to hide physical characteristics, generally affecting the prominence of a person inside a group. The direction can come anywhere from allowance to prohibition. Flügel explained modesty as something which is not genetically determined, and varies between societies.

33

According to Flügel, in 'civilised' societies, protection, decoration and modesty play roles simultaneously, although the antagonism between decoration and modesty is a major issue the author defended as a 'concept of human life'. It is interesting to state that in the natural world, animals already demonstrate all these attributes.

Flügel *in* Carter (2003, p.84) identified different attitudes towards clothing:

Some see clothes as equivalent to the outmost layer of their selves and so incorporate them into their life-world with little difficulty. Others locate their clothing almost wholly within the external environment; clothing is "other" to their sense of themselves.

Baudrillard (1998) introduced the concept of the *Consumer Society* and analysed the relationship between the object of consumption and its utility. The need for a product transferred from the utilitarian focus to a symbolic one.

In a recent study, Kawamura (2005) classified fashion as a symbolic product that has no physical substance and is considered separately from clothing products as tangible objects. More than this, for the author, 'Fashion is not visual clothing but is the invisible elements included in clothing'.

The challenge in this study is to keep symbolic and utilitarian elements associated, as they are both important and not passively dissociated by consumers.

Other theoretical models consider functionality, ergonomics, and aesthetic factors as separate issues, and provide limited overviews that link these psychological, social and cultural dimensions to fashion product development for the grey market (Lamb and Kallal, 1992; Benktzon et al., 2003).

Ballin, in her early study of the science of dress (1885) was aware of the damage that clothing can do to a healthy body and wrote this about ideal garments: 'They should be light, warm, permit free transpiration, or, in other words, ventilate well; they should exert no pressure on any part, and they should be free from all poisonous particles, whether of dirt or of dye.' (Ballin, 1885 *in* Johnson, 2003)

Another study from Barr (1934) notes fundamental attitudes in the psychology of choice of dress: (1) the desire to conform inside a group; (2) the desire for comfort in respect of temperature and tactile sensations; (3) modesty, resistance to a new fashion; (4) the desire for economy, when and what to buy and (5) the aesthetic impulse, the desire to be beautiful (Barr, 1934 *in* Johnson, 2003).

Barr (1934), moreover, explains further the desire for self-expression: a blend of awareness of the physical self, the expression of different personality, the desire to appear distinctive, dignified or youthful, and the desire to appear competent or prosperous (Barr, 1934 *in* Johnson, 2003).

34

Considering the appropriateness of Flügel's model for clothing motivation, it is necessary to add one more variable to the equation. Individuals differ in their physical and psychological characteristics. The next subsection is dedicated to the discussion of the variations of the human body and its implication for garments.

2.2.4.2 The Body Shape

The fashion product – clothing – acts on the body as a second skin and must perform according to the body shape of the consumer. One of the most ignored variables in fashion product design is body shape, due to the dictatorial trend of the tall and slim. Body shape may vary not only by genetic factors, but also is determined by diet, lifestyle, level of fitness and age (Li, 2003).

According to Pheasant (2006), the product should match the user's characteristics. The author presented some criteria to be taken into account to achieve fit: functional efficiency, ease of use, comfort, quality of working life and health and safety.

In the design field, fashion clothing products are one of the few developments for which it is possible to have a truly tailored approach, using sizing, rather than for example the production of cars or chairs.

The use of anthropometrics is relevant, especially due to the variations of body. Body shape varies, firstly between sexes, secondly via ethnicity, and continuously, due to ageing.

All these changes affect not only the visual identity of a consumer, but his/her behaviour and attitudes as well. Some distinctions in body shape certainly have implications for fashion consumption.

Rasband (2002) recommends great attention to fit in wearing clothes. When garments fit well they: (1) enhance appearance and attractiveness; (2) contribute to thoughts of self-confidence; (3) fall smoothly over the figure; (4) improve the relationship between the garment and the shape of the body; (5) emphasize the most attractive areas of the body; (6) draw attention away from the negative; (7) adjust naturally to body movement and (8) support an active lifestyle.

Furthermore, according to Rasband (2002), body shape can vary due to six characteristics: height (shorter, medium and taller), bone structure (small, medium and large), weight (there is an ideal proportion between weight, bone frame and height), proportional body areas (a diagram of joint lengths), figure type (the polygon formed by your shoulders, waist and hips) and posture (the alignment of your body parts over one another).

Sheldon (1940), in the 40s, introduced somatotype research, derived from physical anthropology. The author defined three different classifications of body types, as a combination of size, weight and shape. The three types are endomorph, mesomorph and ectomorph.

Although it is rare for any individual to fall entirely within one classification it is possible to identify the preponderant characteristics of each person in this system. Classification is based on physical measurements using a scale from one to seven for each of the types, and having a combination of the three options as a result.

The endomorphic body type is characterised by narrow shoulders, wide hips, large head and a tendency to body fat, especially on arms and legs. The mesomorphic body presents broad shoulders, narrow hips, square head, low body fat and muscular arms and legs. The ectomorphic body type comprises narrow shoulders and hips, little body fat, little muscle, thin face, and thin arms and legs.

A practical way to classify body shape is based on a combination of three basic measurements: bust, waist and hips for women and collar, thorax and waist for men (Figure 2.12).

Women's shape varies from the pear 'A' figure (narrow top, large bottom), the upside down triangle 'V' figure (large top, narrow bottom), the apple 'O' figure (large waist), to the hourglass 'X' figure (narrow waist).

Men's body shape varies from the triangle figure 'V' (large top, narrow bottom), the upside down triangle 'A' figure (narrow top, large bottom) and the apple 'O' figure (large waist).
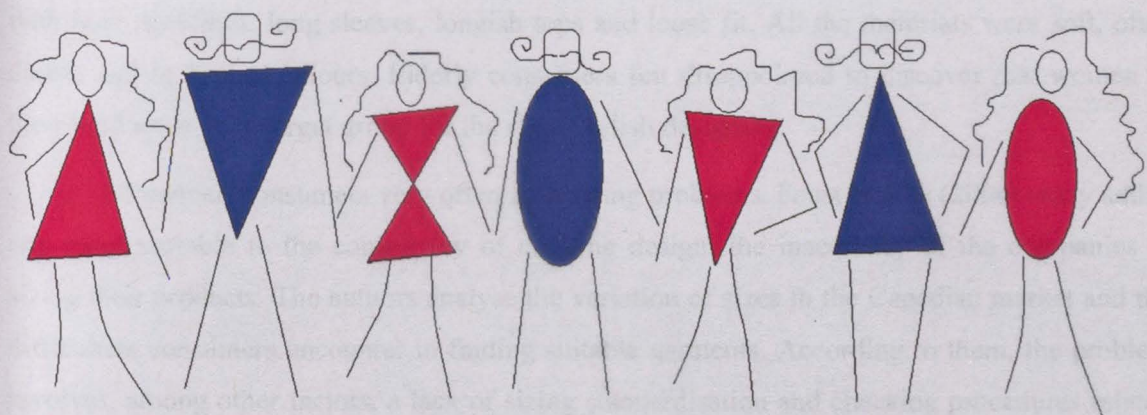
Figure 2.12 – The Body Shapes

Although garments are supported by the body, it is not usual to find products considering body shape differences within the market. The standards presented in catwalk shows and promotional images are the ectomorph "X" shape for females and the mesomorph "V" shape for males. In both cases, younger images are usually preferred.

It is known that older people have limited product choices in the fashion market place. A research study into older female consumers in Finland conducted by Iltanen (2003) stated:

> Middle-aged women often complain that they cannot find clothes that would please them. They say that their body has changed and fashion designers seem to ignore that. If the clothes fit the ageing body the style is not right, but seems to be designed for an older generation. (p.3)

Despite the increase in disposable income and leisure time of this segment of the population, there is still limited market response to their needs (Li, 2003). In a study conducted by Li (2003) with the female grey market, there was a high demand for quality, comfort, function and aesthetic elements in garments - ironically, some of these characteristics are commonly linked to the youth market.

> There is a need for developing a new business theory to cater for the entirely different older people that we have seen emerge in the last decade. That means the basic structure of designing, manufacturing and retailing has to change. (Li, 2003, p.5)

These findings are also reflected in Zhang's (2002) work. Research also indicates that fashion designers need to become more aware of the ageing population's psychological need to express their individual style and taste through a choice of better quality products (Iltanen, 2003).

Iltanen's (2005) research explored this relationship between fashionability and stereotypical views that designers have in relation to older consumer taste. In the study, designers described garments for the grey female market in Finland as having to cover the body, with high necklines, long sleeves, longish tops and loose fit. All the materials were soft, often elastic and in neutral colours. Elderly consumers felt disappointed to discover that women of their kind were not a target group for the more stylish designers.

Moreover, consumers very often face sizing problems. Faust et al.'s (2006) study added one more variable to the complexity of clothing design: the inaccuracy of the companies in sizing their products. The authors analyse the variation of sizes in the Canadian market and the difficulties consumers encounter in finding suitable garments. According to them, the problem involves, among other factors, a lack of sizing standardisation and checking procedures related to the specifications.

As specification is an action directly linked to the design activity, the next section introduces concepts and theories that can support this research into better product development processes in fashion clothing design.

2.2.5 *Fashion & Design*

This section introduces some key concepts for product development in the fashion industry. The design activity is crucial to input creativity into fashion. The section will discuss both the technical and emotional aspects of the design brief.

There are two different aspects to consider when analysing fashion design, as shown in Figure 2.13 below. The first – the intangible – concerns trends, attitudes, values and lifestyle (Solomon and Rabolt, 2004). The second – the tangible – concerns the body, its shape and sensorial factors (Cooper and Press, 1995). There is a tendency within the fashion design industry to minimise the tangible aspects.

Intangibles

TRENDS
ATTITUDES
VALUES
LIFESTYLE

Tangibles

BODY
ANATOMICAL FACTORS
SHAPES
MATERIALS RESOURCES
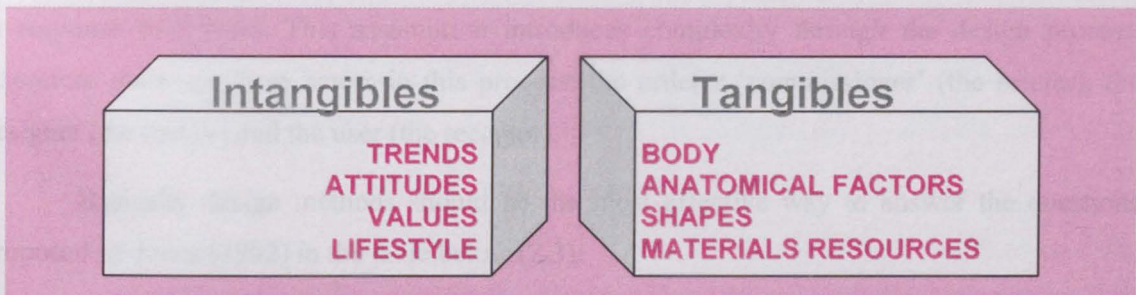
Figure 2.13 – Fashion Design

According to Cooper and Press (1995), 'Design lies between the worlds of culture and commerce, between passion and profit.' (p.4) In the words of Japanese fashion designer Issey Miyake, 'we dreamed between two worlds'.

Adapted by Cooper and Press (1995), Walker (1990) suggested a lack of analytical attention to pleasurability in the act of consumption. This question departs from Marx's notion of commodity fetishism as justification for a post-modern increase in consumption: to gain pleasure. Walker identified five sources of pleasure in the act of consumption. Cooper and Press (1995) adapted these principles to design's contribution, as can be seen in Table 2.2 below:

Table 2.2 – Design Pleasure Principles

Source of pleasure	Design contribution
Desire	Conceiving and expressing the myth or fantasy Advertising
Purchase	Packaging Display Retail environment
The object	Qualities of newness Tactile qualities Aesthetic appeal
Use	Performance Ergonomics Ease of use
Perception by others	Symbolic value

When considering the consumer's point of view, the approaches traditionally used by designers seem to be the most effective in their search for satisfaction. Designers have user-based knowledge and attitudes. This approach also makes the relation between companies and consumers more human led.

According to Jones (1992), the designer's objectives are less related to products themselves and more to the making of a long chain of interrelated predictions and specifications in response to a brief. This assumption introduces complexity through the design process. Therefore there are three actors in this process: the orderer 'commissioner' (the briefer), the designer (the maker) and the user (the receptor).

Basically design methods should be the most effective way to answer the questions proposed by Jones (1992) in the table below (2.3):

Table 2.3 – Design Team Questions

Question about product	Sources of answers
Will the sponsor like it? Is it his interest to invest in it? Will it be put into effect?	Sponsor and financier.
Does it make the best use of available materials and components?	Suppliers.
Can it be made cheaply enough with available resources?	Producers.
Can it be distributed through available channels?	Distributors.
What appearance, performance, reliability, etc. is required?	Consumers and sales organisations.
To what extent will it be compatible with, or competitive with, other products?	Other sponsors.
To what extent will it restructure the existing situation to create new demands, opportunities and problems?	Large scale system operators.
To what extent are its effects, and side-effects, acceptable to al concerned?	Political institutions and pressure groups.

For Mayall (1979) 'Design conceives and defines all the means we employ to satisfy our many and increasingly intricate needs.' (p.9). The principle of totality is fundamental to any design task and yet is sometimes overlooked by designers themselves. It is based on the identification of the features to be considered for the project, and the way to describe these characteristics. The totality of the design is the core task to integrate all these characteristics (Fig 3, p.46).

In this research, the principle of totality has been pursued through the *Indicators for Fashion and Clothing Consumption*. These indicators will be presented in Chapter 3.

Another important principle for the design process stated by Mayall (1979) is the principle of value which will be more fully discussed in Section 2.2.8.3.

Consideration is necessary that is specific to the fashion industry. The product of fashion – clothing – is composed of three strands: ergonomics, trends and subjectivity. Specifically in the fashion industry, where the lifecycle of a product is so short, the market requirements must be directly linked to design teams.

Sinha and Studd (2005), in a study of an integrated fashion design process, defined five essential activities for the completion of the whole cycle of creating a new collection: Research and Analysis; Synthesis; Selection; Manufacturing and Distribution. Figure 2.14 below shows the diagram presented by these authors, indicating inputs, outputs and people for each of the five phases.

According to Sinha and Studd (2005), a general fashion design process starts from business or market requirements. It is important to stress that market requirements reflect the needs and expectations of consumers. For the proper development of the activities, it is necessary to supply inputs to the process (text to the left of the rectangles) and to be aware of the constraints (text to the right of the rectangles) of each phase.

Observing the five phases, the designer is involved in three of the phases: Research and Analysis, Synthesis and Selection. The creativity and the artistic side of the designer is more present on the first phase. The rational attitude due to the specifications of the product and quality control are stronger at the second of the phases. The last of the three phases that the designer is responsible for is composed of market and brand elements, although also defined by the restrictions discovered during the sampling.

business/market requirements

personal taste
inspirations
market trends

A0
design of a
new
collection

no. of designers
available finance,
time

A1
research
and analysis

designers,
company directors

arrival of fabrics,
expertise of sample-making team,
company quality control
requirements,
market requirements as perceived
by designers/company

last season's retail
figures
general, current market
trends for colour, fabric
and shape
fabric exhibitions and
future trends information

A2
synthesis
designers,
pattern cutters,
sample-machinists,
directors

method of distribution
market requirements as
perceived by retailers

repeat styles,
new styles,
repeat/new fabrics,
repeat/new
directions for colour,
new designs,
fabric samples

A3
selection
designers,
directors,
models

arrival of fabric
market requirements for quality
manufacturing locations

samples
patterns
costings

A4
manufacturing
production team
company directors
factories

market requirements
for novelty
market enthusiasm for
clothing purchases

production numbers for
selected garments
production patterns
laymarkers
bulk fabric
production
specifications

A5
distribution
retail staff
design studio
/company
headquarters

garments to
appropriate
retail site

retail
figures

Figure 2.14 – The General Fashion Design Process (adapted)

The first three phases of the Sinha and Studd model (2005) when more deeply examined suggest that consumer needs, expectation, requirements, desire or want is present throughout the whole process. Considering that the diversity of consumers - their cultural and socioeconomic backgrounds, as well as the environment – guide the demands, this suggests a wider approach for the consumer's viewpoints. The next subsections introduce two new theories for developing better products from design theories that seem to be suitable to this investigation in the field of the fashion clothing industry.

2.2.5.1 Pleasure with Products

In the fashion industry, both the consumption process and the product itself can be pleasurable. For Jordan (1999), a product may affect a person's mood and bring emotional benefits. Hedonistic benefits, pertaining to the sensorial and aesthetical elements of products and practical benefits, are the ones linked with the tasks that the product is expected to perform. The pleasure approach considers and combines all potential benefits.

A theory that links consumption with product design arose from Jordan's (2000) thoughts on an adaptation of Tiger's theory (1992). The author extended the consumer interaction with products from functionality to pleasurability, considering usability as the middle point. Understanding people holistically became a complex task in product development.

The framework models four types of pleasure (Figure 2.15): (1) Physio pleasure: connected with touch, taste and smell as well as feelings of sensual pleasure; (2) Socio pleasure: enjoyment derived from relationships with other people. Society; status and image may play an important role; (3) Psycho pleasure: pertains to people's cognitive and emotional reactions. It includes issues relating to the cognitive demands of using the product and the emotional reactions engendered through experiencing the product and (4) Ideo pleasure: pertains to people's values. It relates to the aesthetics of a product and the values that a product embodies.

PHYSIO   SOCIO   PSYCHO   IDEO

Figure 2.15 – Tiger/Jordan's Pleasures

Design research, as a scientific field, has to consider a variety of issues: the environmental impact and consequences, the search for sustainability, the interconnectivity between economic and cultural globalisation and the increased exchange between potential conflicts in accumulated information.

Csikszentmihalyi and Rochberg-Halton (1981) focused on the quality of the subjective experience in human behaviour in order to feel rewarded and they defined the flow experience as a state of being where all the contents of consciousness are in harmony. The subjective experiences of pleasure, happiness, satisfaction and enjoyment are manifestations of flow.

Moving further to the subjective aspects a design can enhance, the subsequent theory presented relates to the emotional relationship a consumer can establish with a product.

2.2.5.2 *Emotion with Products*

It is common sense that design is about conceiving things which meet specific needs (Cooper and Press, 1995 p.16). Some needs may be merely functional or decorative perhaps. As products should fulfil a specified function, design is a problem-solving activity.

According to Norman (2002), there are three basic reasons for design failures as a problem solving activity: (1) often the design community seems to put aesthetics first aiming for the award of prizes and status; (2) designers predominately design for themselves, and assume that familiarity with the problem is general to all users; and (3) designers frequently do not work towards the final user.

Companies are investing in personalisation and mass customisation, with the result of improved consumer interfaces within products and services. The challenge for designers is to capture consumer feelings and emotions through their creations and to ensure a continuous interaction between consumers and products. Thinking about clothing, customisation not only produces garments that fit better, but also allows the consumer to have a sense of ownership, pride, individualism, and to choose things based on emotional value (Norman, 2004).

Quoting Csikszentmihalyi and Rochberg-Halton (1981), Norman (2004) observed the attachment people have to some objects and investigated the meanings and feelings such articles represent. As a consequence, the author introduced a framework to explain emotional design (Table 2.4). Norman (2004) presented three levels of processing emotional design: (1) Visceral, related to natural and instinctive preferences; (2) Behavioural, which considers the functionality and performance of the product as the core issue; and (3) Reflective, linked with the subjective meaning of the product. The consumer affective process with a fashion product should enhance considerations of new product development.

Table 2.4 – Norman's Emotional Design Theory

	VISCERAL	BEHAVIOURAL	REFLECTIVE
keywords	Instinctive preferences; How it looks	Functionality; Performance; How it works	Subjective meaning of product; What it means

43

Increasingly, human factors are being taken seriously as an issue within product design. There is an urgent need for designers and product development teams to have a better understanding of consumption, especially in saturated markets and with declining brand loyalty. Consumption should incorporate pleasurable experience as well as the fulfilment of consumer needs.

Krippendorff (1995) described a relationship between the consumer (user) and the designer. In his proposition, design is a key to making products (things) have a form to be seen, make sense to be understood and be used (Figure 2.16).
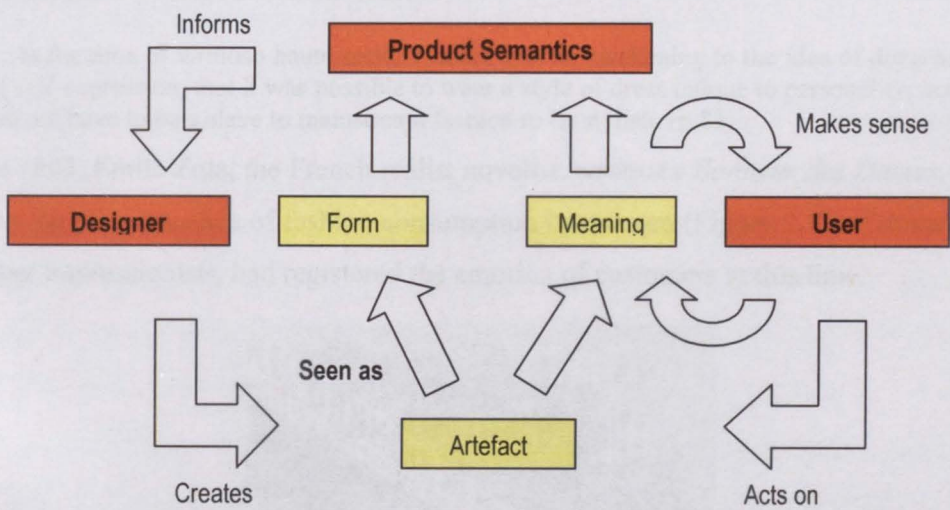
Figure 2.16 – The Relationship between Designer and User

To sum up, the theories discussed in this section demonstrated, from a number of different viewpoints, the natural and necessary interaction between the designer and the consumer. The balance between rationality and subjectivity is a key issue to this relationship. The discussion until this point was more related to the subjectivity of the consumer. The next subsection introduces the question of designer subjectivity.

2.2.6 *Fashion & Art*

Art, like fashion, has an aesthetic content. This section presents the links and joint developments between artistic activity and design practice.

For a long time, the liaison between fashion and art was limited to the artist's ability to provide valuable information about the garments worn by elites (Mackrell, 2005). The artisan who used his or her skills to create the clothes was anonymous. The second link between fashion and art came with fashion illustrators in the late nineteenth century. Newspapers and magazines started to influence consumption and the beginning of trend diffusion was a consequence.

The first signs of identity came with writers and poets when describing the characters of their stories. The first report of a dressmaker's monopoly being created is given to Charles Frederick Worth (1825-1895), considered the 'the father of haute couture' (Mackrell, 2005, p.81). Worth considered his gowns as art pieces and extensively used art history as a source of inspiration for his creations. Mackrell adds:

> …At the time of virtuoso haute couture, there was an awakening to the idea of dress as a means of self-expression, that it was possible to wear a style of dress unique to personality, and that one did not have to be a slave to mainstream fashion to be stylish. (p.83)

In 1883, Emile Zola, the French realist novelist, wrote *Au Bonheur des Dames*, a classic story about the effervescence of fashion consumption by women (Figure 2.17). Edouard Degas, among other impressionists, had registered the emotion of customers at this time.
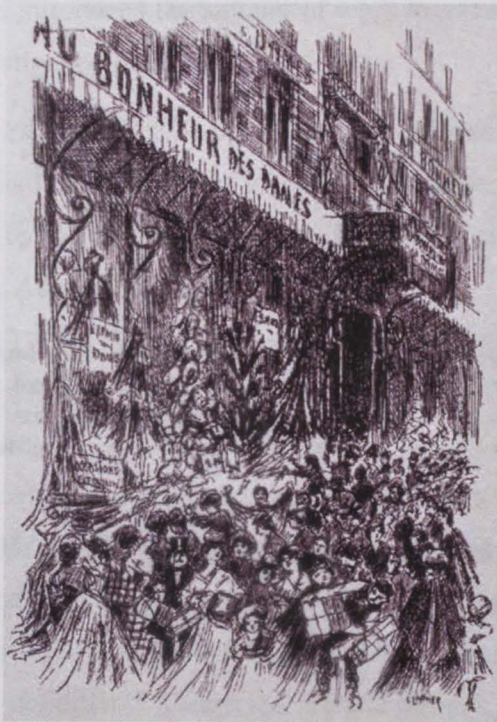
Figure 2.17 – *Au Bonheur des Dames* by Edouard Degas

Moving from Paris to London, in 1884 the famous department store Liberty, introduced a Costume Department, aiming at leadership in art and fashion and creating a recognisable style brand.

One of the major transformations in fashion in the early 20th century was the invention of the 'couturier'. This profession shed its identity as a trade, and couturiers came to be regarded instead as artists (Mackrell, 2005). Paris emerged as a centre of fashion due to the number of new fashion houses established by designers there. In addition, some fashion designers were involved with the art sector as curators of exhibitions.

In the intermediate period between the two World Wars, French fashion consolidated its leadership with the 'Pavillon de l'Elegance' in which fashion designers had a prominent role within the arts. Mackrell (2005) described the '*l'air du temps*':

> Millions of Americans and Europeans and hundreds of international manufacturers visited the Exposition, which has often been called a 'shoppers's paradise'. French department stores ('museums for people') and a 'rue des Boutiques' ('shopping centres for modern women') along the Pont Alexandre III were represented, with carefully orchestrated window displays intended to underline Paris's position as a world centre for shopping. (p.128)

From Surrealism to Postmodernism, modern art periods have been associated with fashion. Artists have been involved with designing garments, fashion designers have been inspired by art works, and the boundary between 'dressmaker' and artist has completely disappeared. The personal understanding/interpretation of reality became a must for fashion designers and the ephemeral fashion show spectacle has become something of an artwork itself. A recent exhibition in Paris introduced the amount of work involved before and after a catwalk show as a new field of investigation itself [2].

In the late 1960s Papanek (1995) compared the creative individual expression of a designer with the dissemination of the artist's egocentric output. He presented examples of home furniture inspired by Mondrian and Van Doesburg paintings as expensive and uncomfortable 'art objects'. According to him:

> With new processes and an endless list of new materials at his disposal, the artist, craftsman, and designer now suffers from the tyranny of absolute choice. When everything becomes possible, when all limitations are gone, design and art can easily become a never-ending search for novelty, until newness-for-the sake-of-newness becomes the only measure. (p.42)

The 80s brought official recognition of fashion as a 'worthy form of cultural expression' (Mackrell, 2005, p.153). The Yves Saint Laurent retrospective exhibition at the Metropolitan Museum of Art in New York in 1983-84 confirmed fashion's importance in museums. Many initiatives followed, including the 1996 *Biennale di Firenze* exhibition *Il Tempo e la Moda*, which definitively connected art and fashion. The exhibition of fashion designers' work in museums is now commonplace and a growing number of contemporary fine artists have used textiles and fashion as a key element in their creations.

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[2] *Showtime, le défilé de mode* is an exhibition held at Palais Galliera - Musée de la Mode la Ville de Paris, from 4 March to 30 July 2006.

The phenomenal general interest in fashion within society, reflected in museums, fulfils a social duty to offer retrospectives of fashion designers. Reports evidence the increase in visitors when a fashion exhibition opens, suggesting fashion in museums is a profitable subject[3].

The artist's historic freedom to demonstrate individuality and eccentricity has now been extended to the domain of designers. The combination of high cultural status from association with art, and the mainstream power of communication has helped the appearance of this art-fashion movement.

Taylor (2005, p.448) wrote: 'Divisions between artist and fashion designer could be deemed as unnecessary in this climate of creativity, in which boundaries are crossed into other production areas.' Some boundaries for fashion designers have been removed, and now both art schools and traditional technical schools are extremely close. All expressions of creativity are now welcomed in both fields.

Taylor (2005) highlights this ambiguity:

Fashion is now involved in a creative world in which artists are no longer confined to a chosen classification but work across the disciplines of creativity. As another effect of the post-modern society, cultural theorists would argue that this signifies a breakdown of high culture into popular culture, where art has become associated with popular culture, and with the associations of commerce. (p.452)

The curriculum of fashion degrees nowadays has more content related to curatorship than sewing and pattern cutting. According to Muller (2000, p.15), 'The vocabulary of fashion adopted the language of art and began to include expressions such as "concepts", "happenings", "installations" '. As a consequence, designers are moving further away from the consumers.

Another aspect of that dialectical relation between art and design is the fact that fashion has an ephemeral status in comparison with an art artefact (Lipovetsky, 2002; Taylor, 2005). The mass produced character of fashion is something that should be a parameter to separate 'art fashion' from 'simply fashion'. But the 'vintage' trend within fashion has responded to this. Vintage is a word from oenology to designate the best selection of wines from each season. In fashion it means the 'old-fashioned' items that could be worn, collected and considered as 'cool fashion'.

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[3] Some controversy about place of fashion within traditional museum and commercial reality and cultural snobbery was on of the points discussed at "Fashion on Display" Symposium held at Victoria & Albert Museum in association with London College of Fashion, University of the Arts London on 25 February 2005.

47

The discussion has become more widespread in recent years and the Director of the London Design Museum has said: 'Quibbling over whether fashion is more or less important than art is just as pointless as questioning whether or not it is art. Of course it's not, it's fashion.' (Rawsthorn, 2003 *in* Taylor, 2005, p.446). The discussion is never ending, and the understanding of fashion as a complex multidisciplinary field is the way to explain its fascination.

According to Cooper and Press (1995), the nature of design is changing continuously, as the boundary between art and everyday life diminishes. As goods symbolise more meaning and increased value to consumers via exclusivity, it has become a very desirable marketing tool. 'Design as art' can actually be an effective marketing strategy, as all cultural definitions of art, design, craft and commodity are changing.

Potter (1989) in his book *What is a designer: Things, Places, Messages*, quoted by Cooper and Press (1995) said: 'The artist's responsibility is to the truth of his (her) own vision', whereas a designer works with, and for, other people (p.15).

Moving forward within the complexity of the fashion system, next section introduces marketing issues, strategies and theories to the equation of a better fashion clothing product development process.

2.2.7 *Fashion & Marketing*

This section presents some of the key issues that ensure a close link between fashion and marketing. The practices to promote consumer awareness of new trends and product launches are critical subjects for the popularity of fashion brands. The section is organised in five parts, covering environment (section 2.2.7.1), strategy (section 2.2.7.2), promotion (section 2.2.7.3), lateral marketing techniques (section 2.2.7.4) and marketing management (2.2.7.5).

Cooper and Press, (1995) suggested that the link between fashion and marketing is more visible than that between marketing and design (p.148).

Currently, there is a debate to find where best to place design activity. Some writers have identified design as a strategic tool, while others define it as an essential part of the product development process. There is one side towards arguing that design should be managed by marketing and another defending the full integration of both fields (Bruce and Roy, 1991).

The corporate orientation towards the consumer is known as 'marketing concept' (Cooper and Press, 1995, p.150). This concept argues that in order to be successful, a company should identify and respond to consumer needs. Although market research is an important tool for marketing activity, it is also crucial to design.

Trends, expectations, desires and needs, whether intangibles or tangibles, are expected to be transformed into products by designers. Moreover, designers are creative professionals and have the skills and ability to invent new concepts and solutions. Although the information provided by market research helps designers to focus on sensorial or functional problems, it does not solve them.

According to Cooper and Press (1995, p.228) quoting Lorenz (1987), there is often a 'misalliance between marketing and design' inside companies. Usually, design is surrogated to marketing instead of being an equal partner. Design can express visually the corporate identity of a company as well as its social responsibility and should be included in any decision-making activity.

Considerable progress needs to be made in the whole area of communication by the fashion industry leaders in order to maintain their market position. One of the greatest difficulties that this industry has is related to communication between stakeholders. While designers appear to create collections based entirely upon their own view of customer requirements, marketing teams display and advertise what they understand to be more profitable, and manufacturers prioritize a reduction in both cost and production complexity. The consumers, on the other hand, feel tired of overexposed products and services that do not fulfil their expectations.

Considering the diversity of variables and viewpoints in fashion design and marketing, the next subsections present specific theories in order to support the analysis aimed at by this research.

2.2.7.1 *Marketing Environment*

There are many variables that operate within a company's environment that have a direct or indirect influence on their consumer strategy. A successful company is one that understands and can anticipate and take advantage of changes within their environment.

Environmental analysis should look at both external forces (those factors that a company has no control over) and internal forces (factors that a company has direct control over).

A very efficient way to manage external forces is to use the PESTEL model, comprised of Political, Economical, Social, Technological, Environmental and Legal factors.

Political factors can have a direct impact on the way a business operates. Decisions made by government affect our everyday lives and can come in the form of policy or legislation. The government's introduction of a statutory minimum wage affects all businesses, as do consumer and health and safety laws, and so on.

All businesses are affected by economic factors nationally and globally. Interest rate policy and fiscal policy will have to be set accordingly. Within the UK, the climate of the economy dictates how consumers behave. Whether an economy is in a boom, recession, or recovery will also affect consumer confidence and behaviour. A truly global player has to be aware of economic conditions across all borders and ensure that they employ strategies and tactics that protect their business.

Population changes also have a direct impact on all organisations. Changes in the structure of populations will affect the supply and demand of goods and services within an economy. As society changes, a company must be able to offer products and services that aim to complement and benefit peoples' lifestyle and behaviour.

Changes in technology are affecting the way business operates. The Internet is having a profound impact on the marketing mix strategy of organisations. Consumers can now shop 24 hours a day comfortably from their homes. The challenge these organisations face is to ensure that they can deliver on their promise. Those businesses which are slow to react will fall at the first few hurdles. This technological revolution means a faster exchange of information, that is beneficial for businesses as they can react quickly to changes within their operating environment.

Environmental concerns are widespread and increasing. Any action by a company can influence consumer understanding about its commitment to the environment. Green brands are also increasing in size and scope. Legislation and world organisations try to address factors in different types of markets and business. Fair trade is a trend for the future in all companies. Social responsibility also is increasing.

To sum up, the variables inside the PESTEL analysis can be very useful within the company decision-making process when leading within the fashion industry. As already explained, the fashion environment is one of the most dynamic within all industries. Moving forward, the next subsection presents the marketing mix tools that can help in the product and company strategy.

2.2.7.2   Marketing Strategy

One way a company can manage internal forces to gain competitiveness, is using the marketing mix analysis introduced by McCarthy and Perreault (1995). Initially marketing was known as 'the four P's': Product, Place, Price and Promotion. This theory was extensively applied and the content was expanded by Booms and Bitner (1981), who added three more 'P's': People, Processes and Presentation.

The first 'P' (*Product*) has already been discussed in a previous section and has its primary focus with the design team. Marketers should engage with and understand the design concept to be able to better communicate to the consumer.

Place is related to the location of the sales point. Although an analysis is not within the scope of this research, it is important to stress the direct link this decision has with consumer accessibility.

The amount of money the consumer is ready to pay for a product is an issue to be critically considered throughout internal analysis. *Price* can give competitiveness to a company, although low price does not necessarily mean easy sales. The value added to a product can offer profit potential for a company.

The way the company communicates their products to the consumer and the tools used to get his/her attention are part of the promotional strategy. This subject will be considered further in the next subsection.

Everybody involved in the entire consumption chain, from product development to sales actions, must be committed and motivated. The sales team is the key for a successful relationship with the consumer.

Processes have a crucial impact in consumer decision-making. The co-ordination of procedures, mechanisms and actions of the company towards marketing advantage enhance the leadership position of a product or service.

Especially in the fashion industry, where aesthetics is an essential component of awareness, the *Presentation* of the company and its products or services can make an immense difference. The display of the product and its environment can enhance the concept and consumer interest.

2.2.7.3   Marketing Promotion

Promotion is part of the marketing mix. Promotion involves disseminating information about a product, product line, brand, or company. It is comprised of five subcategories:

Advertising: the purpose of advertising is to stimulate demand for a product, service or idea. Other factors influencing demand are price and substitutability. A major way advertising may stimulate demand is to create a brand franchise for a product.

Personal Selling: sales, or the activity of *selling*, form an integral part of commercial activity. As a practical implementation of marketing, it often forms a separate grouping in a corporate structure, employing separate specialist operatives known as *sales people*. The primary function of sales is to find and close leads, turning prospective into actual consumers.

Sales Promotion: sales promotions are non-personal promotional efforts that are designed to have an immediate impact on sales. Sales promotion is media and non-media marketing communication employed for a pre-determined, limited time to increase consumer demand, stimulate market demand or improve product availability. Examples include: coupons; discounts; contests; point of purchase displays, etc. Sales promotions can be directed at either the customer, sales staff, or distribution channel members (such as retailers).

Publicity: Publicity is the management of product or brand-related communication between the firm and the general public. It is primarily an informative activity (as opposed to a persuasive one), but its ultimate goal is to promote the company's products, services, or brands. A publicity plan is a planned program aimed at obtaining favourable press coverage for a company's products. The most basic tool of the publicist is the press release, but other techniques include telephone press conferences, in-studio media tours, video news releases, newswire stories, and internet releases. For these releases to be used by the media, they must be of interest to the public (or at least to the target market segment). The releases are often customised to match the media vehicle that is being used. Getting noticed by the press is all about saying the right thing at the right time. A publicist continuously asks 'what is going on', provokes the reader's curiosity and makes a good story.

Public Relations: Public relations (PR) is internal and external communication (use of symbols and symbolic acts) to inform or influence specific segments of the public using writing, marketing, advertising, publicity, promotions, and special events. Some public relation specialists work as full-time employees of companies, politicians, non-profit organisations, or governments, while others work for PR agencies or as free-lance PR consultants that contract their services to clients (usually corporations, wealthy individuals or other special interests) who pay for their expertise at keeping them in or out of the spotlight, whichever is necessary.

Afterwards, the promotion as well as the other three components of the marketing mix can be analysed and balanced according with the vision of the marketing strategy the company adopts. In this way, next section introduces the concept of lateral marketing as an approach to enhance consumer satisfaction and competitiveness.

2.2.7.4 Lateral Marketing

The selectivity of the consumer when searching for products and services is a sign that marketing should evaluate its performance in order to gain competitiveness.

Kotler and Trias de Bes (2003) proposed an upgrade in marketing practices. The authors named conventional processes as vertical marketing and created a new complementary one: lateral marketing - which implies an important analysis and consequently transformation in a product.

The idea consists of the evaluation of the product or service by its non-logical paths, stimulating new needs, people, situations or uses. According to Kotler and Trias de Bes (2003), the technique is most effective in mature markets or in very fragmented ones. Table 2.5 shows the comparison between the two approaches:

Table 2.5 – Comparison between Vertical and Lateral Marketing

	Vertical Marketing	Lateral Marketing
It is based on...	The set of needs, persons, and situations or uses of our product. Our mission, innovating from what to be as a company.	The discarded needs, persons, situations, or uses of our product. Being open to redefine our mission if necessary, but innovating from our current offer.
It works...	Vertically, following the marketing process.	Laterally, out of the marketing process.
In an early stage it allows...	Development of markets and conversion of potential customers into current customers.	Creation of markets, categories, or subcategories, and capability of reaching targets/situations nonreachable with the existing products.
In a later stage it allows...	Low incrementality, but it is an easy-to-sell novelty.	High incrementality, but it is a more risky option.
Its source of volume is...	Market share of product competitors, and the conversion of potential customers and situations into current ones.	Totally incremental, without affecting other markets, or by taking from many other categories market share of generic competition.
It is appropriate when...	Early stage of the life cycle of a market or product (growing phase). Low-risk strategies. Low resources available. For defending markets by fragmenting them.	Mature stage of the life cycle of a market or product. High-risk strategies. High resources available. For attacking markets from the outside (with substitutes).
It is the current responsibility of...	Marketing departments.	Not always marketing departments, but of: Creative agents, Entrepreneurs, Small and medium companies, Engineers, R&D departments.

In the fashion industry, the degree of variety around the same 'product formula' is immense. The challenge resides in adding different approaches for clothing, or in innovating new uses for it.

Wellington boots are known in the countryside by hardworking consumers as a utilitarian product. The introduction of colours and pattern brought a fashionable appeal to the product, which became a desirable product for girls and trendy outdoor lovers. The broken paradigm in this example was the enhancement of the aesthetics, as hardwearing and safe were already in the 'product formula'.

Lateral marketing departs from the wide brief of product development process, analysing especially the items discarded during the brainstorm phase. This posture breaks the traditional process for innovation and changes a company's culture to multidisciplinary teams. This practice is expected to lead to better competitiveness and growth.

After discussing tools that support the company in relation to its management and its external environment, it seems necessary to introduce a marketing management theory that supports analysis of consumer preference in relation to products. The next subsection explains the Means-End Chain theory.

2.2.7.5 *Marketing Management*

As previously explained, marketing management can be analysed from two distinct perspectives: macro and micro approaches. They differ, mainly, by a sort of zoom in and zoom out through products and consumers.

According to Reynolds and Gutman (1988) the Means-End Chain theory focuses the micro level by examining the linkages between the attributes that exist in products (the 'means'), the consequences the attributes provide for the consumers and the personal values (the 'ends') reinforced by the consequences.

The *Means-End Chain Model* theory (Gutman, 1982) is a way of systematically representing the hierarchy of attributes, consequences and values. The first level (attributes) is formed by the characteristics, components and parts of the product. The following level (consequences) is dedicated to the way consumers will benefit from the products. At the top of the chain are the values, which represent the aims of the consumers.

The levels represent many factors from the physical aspects of a product to personal values related to it. This theory offers a better understanding of the consumer's rationale behind his/her feelings towards the product. The technique can help measure the relevance that a consumer gives to a product in relation to his/her life as well as its functional properties. The theory is based on the supposition that consumers see products as means to important ends (Mulvey et al., 1994).

The most common way to achieve a Means-End Chain Model analysis is using the laddering technique. It is know as a tool to describe a cognitive structure of a person or groups, mainly based on individual interview. Laddering is an effective method of analysing simultaneously all aspects of consumer behaviour affecting product choice. The model adopted offers the opportunity of comparing the degree of importance that designers and companies give to value, consequence and attribute indicators, and then comparing these to the opinions of consumers.

The Means-End Chain is largely used in marketing management within companies, especially when dealing with decision-making processes. Despite this, no studies were found using this theory for fashion products.

Furthermore, the theories presented in this section attempted to give the reader a wide overview of ways to analyse the linkages between fashion and marketing. These approaches give support for the development of this research, although the panorama is not yet completed. The next section is dedicated to the discussion of business issues, followed by a section related to manufacturing topics.

2.2.8 Fashion & Business

This section examines essential theories related to management. Due to the complexity of the fashion system and the diverse interests of all stakeholders, from suppliers to buyers, a clear business analysis with a position and aims seems to be crucial for sustainability. The forthcoming subsections introduce detailed explanation of management direction, strategic management, value analysis and strategic groups.

It is especially true in the fashion industry, where the lifecycle of a product is so short, that the market needs to be directly linked to cross-functional product development design teams. From the same perspective, because of the dynamism of the fashion process, decisions need to be made at a management level according to market and design levels.

Globally the fashion industry is at the forefront of emerging industries. Even in mature European markets, the approach of using trend forecasting and the emphasis on short product lifecycles allows for continuous growth and development within the industry. The consumer's appetite for variety has led to increased rates of product introduction, product proliferation and shortened product cycles (Abernathy et al., 1999). This means that companies have to respond much faster to rapidly changing markets; however this is much easier within local markets than global markets.

Originating from textile production, the clothing and fashion industries have operated within the arena of global design, and information about them is accessible via the internet, or via laboratories and the personalised services provided by diverse specialised agencies. Studies about consumption provide interesting access to the type of information that the firms lack, on tastes, needs, desires, attitudes, opinions and the interests of consumers and the most relevant social groups (Branco et al., 2000).

2.2.8.1 *Changing the Direction of Management*

The traditional approach to developing and offering products is based upon the capacity of companies to produce and offer something based on their past record of success, or their production capacity. In this respect, the marketing function is there to stimulate the consumption of goods or a service.

The increasing power of the consumer in contemporary marketplace dynamics, and the pace of change enabled by faster and more effective communication and information technologies, requires companies to adopt new approaches. The day of the naïve consumer has ended and respect for their rights and priorities has become a must for companies searching for the right approach.

One of the firsts things a company should examine is the rationale for the very existence of the business. According to Abell (1991), nowadays there is a clear need for change from the product-oriented business to the consumer-oriented one. This decision has a strong impact not only on the way the company deals with the market, but also influences internal changes, especially within the company culture and team profile.

From the consumer's point of view, the approach traditionally taken by designers seems to be one of the most effective in their search for product satisfaction, because designers have a user-based approach and attitude. This approach also makes the relationship between companies and consumers more human-orientated. To ensure that the design process most effectively takes into account the needs of users, the value of studies such as this one is in identifying and prioritising issues, preferences and directions, based upon evidence, which otherwise would not be available to or accessible by individual designers.

Taking into account that companies should review their strategy frequently in order to maintain or increase their market share, substantial theories for changes and adjustments in strategy are detailed in the next subsection.

2.2.8.2 *Strategic Management*

A strategic analysis precedes strategic planning. In this research the models of Porter (1998a, 1998b) and the theories of Hill and Jones (1998), in particular, have been used to guide the following insights.

For a strategic analysis of any industry, it is appropriate to consider Porter's definition of an industry as (1998a): 'a set of companies that supply products and services to satisfy the same consumers needs'. (p.8)

Another important step towards a strategic vision is Abell's (1991) definition of business. According to the author, three dimensions define a business: the group of consumers (who are being satisfied), the distinct needs of consumers (what needs are being satisfied) and abilities (how the needs of the consumers are being satisfied).

In its conception, the definition of a business comes increasingly from a consumer orientation rather than from a product orientation. The choice for a consumer-oriented business gives the company a certain security in consumer demanded changes. In effect, it allows the company to anticipate changes in demand and changes in the business and social environment.

However, for a long period of time, the consumer-oriented vision was ignored. The process of globalisation of markets and strong competition with imported products has changed this scenario. Now, it is urgent to consider the consumer as a starting point for any strategic planning for an industry, or company.

Especially in the fashion industry, where it is added value that has the capacity to conquer new consumers; it is necessary to clarify the amount of value the company offers to the consumers. The next subsection explains several viewpoints and definitions of distinctive ways to understand values.

2.2.8.3   Value Analysis

According to Cooper and Press (1995), a consumer society is based on status. Moreover, status is a reflection of consuming more and higher priced goods and services. The values of the products have changed within the development of consumption, from use-value to exchange-value and then to symbolic-value.

When considering strategic management, value creation is one of the most important analyses to take place. Although the first study found in the literature was the Aristotelian description of seven different classes for value 2,000 years ago (economics, political, social, aesthetics, ethical, religious and judicial), the most famous definition directly linked with the companies interest was developed by Marx - The Labour Theory of Value - which is comprised of two categories: *exchange value* and *use value*.

In *Capital (Das Kapital)* by Marx (1946/1867), quoting Adam Smith and David Ricardo, the development of the labour theory of value took place to explain social relations. Unlike Smith and Ricardo, who considered value as a natural price or a production cost, Marx's theory of surplus value is based on the product. The theory equates the 'value' of an exchangeable good or service with the amount of labour required to produce it.

According to Marx (1946/1867), the value that is inside a product or service (commodity) is the 'entity' that regulates production. In his work, a product has four major attributes: a *Value*, a *Use Value*, an *Exchange Value* and a *Price*. The value is the socially-necessary labour time that it embodies, the *Use Value* is what a commodity provides to its buyer, the *Exchange Value* is how much labour-time the sale of the commodity can claim and *Price* is the cost of production (labour time) added to profit (the *Surplus Value*).

Marx emphasizes that the *Use Value* of a labour-product is practical and objectively determined. The *Use Value* of a product therefore exists as a material reality vis-à-vis social needs regardless of the individual need of any particular person.

The concept is introduced at the beginning of *Das Kapital*, where Marx wrote:

> The utility of a thing makes it a use value. But this utility is not a thing of air. Being limited by the physical properties of the commodity, it has no existence apart from that commodity... Use values become a reality only by use or consumption: they also constitute the substance of all wealth; whatever may be the social form of that wealth. In the form of society we are about to consider, they are, in addition, the material depositories of exchange value. [4]

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[4] http://www.marxists.org/archive/marx/works/1867-c1/ch01.htm ; accessed on 20 April 2006.

For Marx, *Exchange Value* is the way the value manifests within a product (commodity). His view of commodities in *Das Kapital* is illustrated by the following quote:

> We have seen that when commodities are in the relation of exchange, their exchange-value manifests itself as something totally independent of their use-value. But if we abstract from their use-value, there remains their value, as has just been defined. The common factor in the exchange relation, or in the exchange-value of the commodity, is therefore its value. (Vintage/Penguin edition, p. 128)

In his work *For a Critique of the Political Economy of the Sign*, Baudrillard (1981), referred to and developed an idea based on Marx's works. He adds to the equation of consumption the concept of symbolic exchange value as a construct of the unconsciousness. An object of consumption has embodied to itself differential connotations of signs. This singularity can be status, prestige, fashion, love, or anything emotionally related which gives the object a distinct meaning. This social relation creates a hierarchical code of signification and the constraints of the code that regulates the social logic of exchange.

According to Baudrillard (1981), to understand the logic of consumption it is necessary to explain the logic of the sign value. From his thoughts there are four logics to be concerned with: (1) a functional logic of the use value – the logic of the utility, the instrument; (2) an economic logic of exchange value – the logic of the market, the commodity; (3) a logic of symbolic exchange – the logic of the gift, the symbol and (4) a logic of sign value – the logic of status, the sign. Finally an object is not autonomous and is not an object of consumption unless it is exclusively a function of the logic of significations.

In the 50s a new theory regarding value was set up by Lawrence Miles, an engineer at General Electric: *Value Engineering*. The theory formalises a team-oriented technique that determines the 'value' of each part and each product. *Value Engineering*, thus, critically examines the contribution made to product value by each feature of a design. The innovative approach noted by Miles is the definition of *Esteem Value*.

According to Mayal (1979) *Esteem Value* is the amount of value placed upon the product or service over and above how well it achieved its basic purpose. 'We might "esteem" our chair for its particular appearance, its suitability to a particular environment, its quality of finish and, perhaps, the social standing it might bestow upon us.' (p.67)

Although *Value Management* is an area of engineering best known as related to production and decision-making, it is crucial for the product development process. According to Csillag (1995), since the introduction of *Value Analysis*, a lot of improvements have been made and nowadays it is considered a vital tool for many management teams around the world.

The methodology for *Value Analysis* requires multidisciplinary efforts, from marketing professionals responsible for the customer definitions towards engineering and manufacturing conformed production with the design plan. Creativity is not explicitly considered within the process.

The basic principle is a comparative analysis of the different nature of values within a product and service, and based on this evaluation, defining the output. *Function Value* is defined as a ratio between the satisfaction of needs (what is necessary for a user) and the use of resources (everything that is required to satisfy needs).

The assertion of greater value is based on fewer resources used or more satisfaction of needs. It is important to notice that stakeholders inside the process have, sometimes, incorporated different aspects about the meaning of value. The proposal is to blend these differences and take advantage of subsequent benefits.

Csillag (1995) presented four types of value to be included in the methods for value analysis: cost value, use value, esteem value and exchange value.

Use Value relates to those attributes of a product that enable it to perform its function. *Use Value* is also a monetary unit of the item's properties or qualities that enable its use, work or service performance.

Cost Value is the total cost of producing the item. *Cost Value* is more a measure of the amount of financial resources necessary to produce or get an item. In this study, *Cost Value* will not be analysed as it is related to its production process rather than being an intrinsic feature of the product.

Esteem value is the additional premium price that a product can attract because of its intrinsic attractiveness to purchasers. *Esteem Value* is also associated with features or attractiveness that makes an item desirable.

Exchange Value is the sum of the attributes that enable the product to be exchanged or sold and is connected with the capacity of the item to be exchanged with other goods or services, characterising a trade act.

Although the relative magnitude of these different types of value will vary between products, and perhaps over the life of a product, Value Engineering attempts to identify the contribution of each feature to each type of value through systematic analysis and structured creativity enhancing techniques.

There is a crucial difference of views between the supplier and the customer that needs to be discussed. According to Csillag (1995), for suppliers, the value is a ratio of function with cost, while for customers it is a ratio of perceived value with price. From this, arose a need to establish a standard value, also known as the necessary fair value.

Some of the benefits in using this method of analysis are related to the achievement of a common value culture between stakeholders, to the enhancement of communication inside a multidisciplinary team and the act of supporting competitiveness.

Competitive advantage, according to Hill and Jones (2004) is related to profitability. This issue depends on: (1) the amount of value consumers place on the company's products; (2) the price that a company charges for its products and (3) the costs of creating that value. For these authors, the value that consumers are able to pay above the price is the consumer surplus.

Companies can increase their consumer surplus value by adding superior performance, design or service, amongst other things. Hill and Jones described the way to create value as a blend between the resources and capabilities of a company. The resources can be tangibles or intangibles, and the 'most wanted' is the unique resource, the one that no other company has. The capabilities refer to the company's skills at coordinating its resources in the most productive way possible.

Moreover, competitive advantage is reached by the analysis of the four distinctive competencies according to Hill and Jones (2004): efficiency, quality, innovation and customer responsiveness. Figure 2.18 illustrates the roots of competitive advantage below.
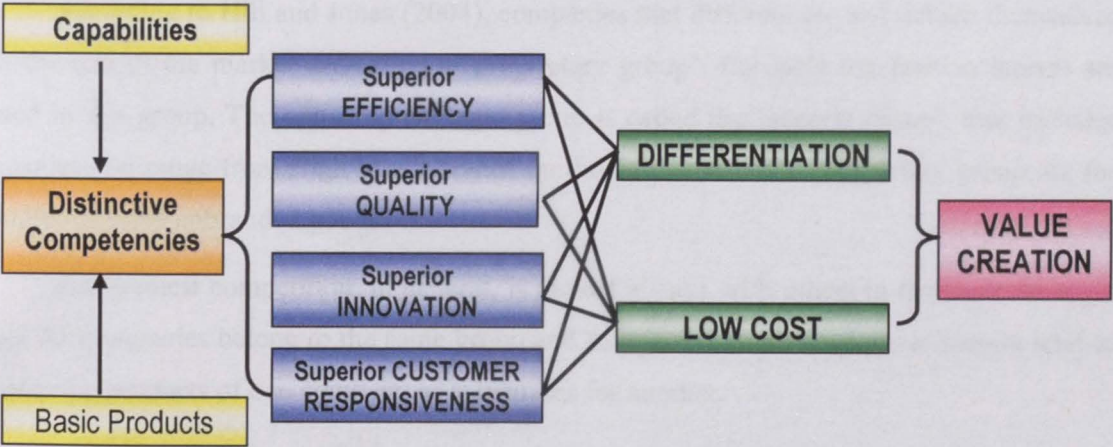
Figure 2.18 – The Roots of Competitive Advantage

Efficiency is measured by the ratio between the outputs and the inputs a company takes to produce wealth. Superior Efficiency is reached when fewer inputs are necessary to produce a given output.

Superior Quality has two impacts upon competitive advantage: firstly, the provision of high-quality products increases the value in the eyes of the consumers; secondarily, as a result of the greater efficiency and lower unit costs it brings.

Superior Innovation is defined by the capacity of a company to produce anything new. The uniqueness of an innovation method or product gives competitive advantage, as it allows the company to charge a premium price until its rivals are able to imitate it.

Customer Responsiveness is analysed by the ability a company has to identify and satisfy consumer needs better. A very common way to reach superior Customer Responsiveness currently is to adopt a customisation approach with consumers.

Furthermore, all these variables and the consequent decisions a company makes are also related to the industry and the group inside the industry where the company is located. The next subsection explains the definition of strategic groups and shows an adaptation for the fashion industry.

2.2.8.4   The Strategic Groups

Groups of companies that follow different strategies inside an industry are called strategic groups (Hill and Jones, 2004). Frequently, inside an industry there are differences in aspects such as the distribution chain, market segments, product quality, technological leadership, consumer services, pricing policies, advertising and promotions.

According to Hill and Jones (2004), companies that differentiate and detach themselves from the rest of the market are called a 'proprietary group'. Europe's top fashion brands are located in this group. The opposing strategic group is called the 'generic group', that includes companies that range from High Street brands on the threshold of the proprietary group, to, for example, Chinese unbranded goods.

The greatest competition, in general, is almost always with others in the same strategic group. As companies belong to the same group and follow similar strategies, consumers tend to consider the products of one company as substitutes for another.

Linked to a low level of threat and a high level of opportunity some strategic groups are more successful than others inside an industry. It must be remembered that if the environment provides a change of strategic group, it does not occur without costs, due to the barriers to mobility between groups.

For Porter (1998b), lack of competitiveness can be seen as a great motivator for change and therefore increased company profitability. The task is to know how to recognize a change in the environment. This recognition allows emerging opportunities or threats to be considered in strategy and planning.

Table 2.6 below shows the results found in previous research (Rocha, 1999) concerning strategic group management recommendations for the fashion and clothing industries. These outcomes were based on the theories previously noted in this study.

Table 2.6 - Strategic Groups' Management Recommendations for Fashion and Clothing Industries

	GENERAL	
	Proprietary Group	Generic Group
COMPETITIVE STRUCTURE	Fragmented	Consolidated
COMPETITIVE ADVANTAGE	Differentiation	Costs leadership
COMPETITIVE DIMENSIONS	Consumer responsiveness product quality innovative design	Efficiency manufacturing quality innovative distribution
VALUE CREATION	Research and development Services	Production Marketing and sales
DISTINCTIVE COMPETENCES	Intangible resources Contracted production Avant-garde R&D Portfolio unlimited Limited products offer Selected marketing and sales Unit economic batch	Tangible resources Owner production Basic R&D Portfolio limited Unlimited products offer Extended marketing and sales Economic batch

	SPECIFIC FOR FASHION CLOTHING INDUSTRY	
	Proprietary Group	Generic Group
RESEARCH & DEVELOPMENT	High investment	Low investment
COMPETITIVE ADVANTAGE	Differentiation	Costs leadership
PROFITABILITY	High return per product	Low return but by quantity
VALUE CREATION	Branded products	No branded products
GROUP PROFILE	Big groups of luxury goods	Multibrand companies
STRUCTURE	Fragmented	Consolidated
DISTINCTIVE COMPETENCES	High consumer responsiveness Low efficiency Quality of product Innovation in design	Low consumer responsiveness High efficiency Quality of processing Innovation in distribution
TARGET	Elite	Mass market

Although all these recommendations are worthwhile, there is one more field to explore concerning the enhancement of the fashion clothing product development process – the manufacturing process. The next subsection discusses the role manufacturing can play within the whole process of fashion product development in order to produce better results.

2.2.9 Fashion & Manufacturing

This last subsection introduces theoretical aspects to this research related to the manufacture of the product – clothing.

63

It seems important to discuss the complexity of the clothing production process. In some ways the whole textile chain is involved, and from the initial fibre extraction processes to the boutique shop floor, a minimum of 18 months is necessary.

The apparel industry needs to consider the variety of products with shortened product lifecycles and a much faster response to market changes.

Abernathy et al. (1999) represented the growing product diversity as a 'fashion triangle' (Figure 2.19) and explained:

> Apparel items at the very top of this triangle include dresses from Paris, Milan and New York runways, which represent a very small share of apparel sold. The majority of fashion products also have a short selling life – usually one season – but are produced for a broader market. At the triangle's bottom are basic products that remain in a retailer's or manufacturer's collection for several years, such as men's white dress shirts or underwear. Basics historically constituted the majority of apparel products sold. In the middle of the triangle are fashion-basic products, typically variants on a basic item but containing some fashion element (such as stonewashed jeans or khaki pants with pleats or trim). This expanding centre of the fashion triangle indicates where the industry is headed. Because a growing percentage of basic apparel items have some fashion content, fashion-basic products are driving product proliferation. (p.9)
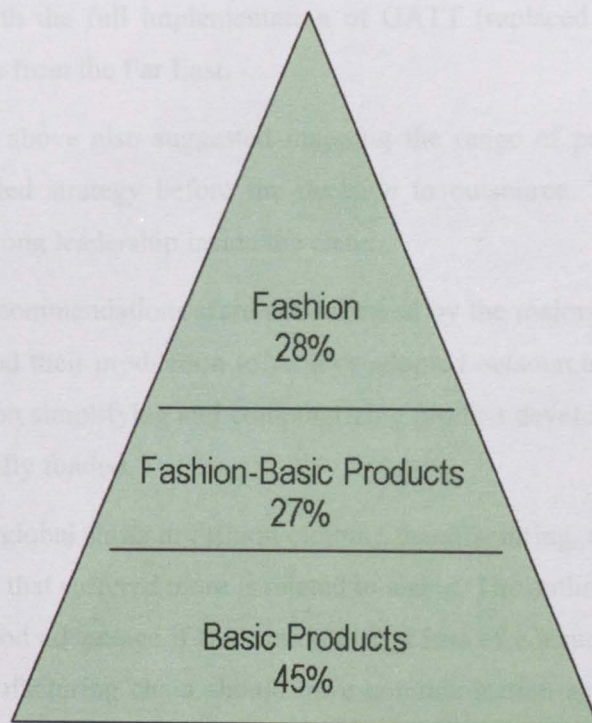
Figure 2.19 – The Fashion Triangle

In consonance with Abernathy et al. (1999), it is important to highlight that apart from the shortness or longevity of a product lifecycle, consumer preferences also need to be understood. Normally the Fashion product is more embodied with the personality and individuality of the consumer, in opposition to Basic products, where standardisation is very common. Between both, the Fashion Basics category is where brands can most easily increase their market share, due to the emergence of fashion elements everywhere.

Even considering global differences between societies, recently information technology has supported the awareness for fashion items. Moving further, shifts in manufacturing have also happened, as explained in the subsequent subsection.

2.2.9.1   The Global Shifts

According to Abernathy et al. (1999), the rise of Asian manufacture in the global environment motivated companies to search for more competitive advantage within the fashion clothing industry. Their study presented five propositions for U.S. industry: (a) closer integration inside the channel through information and distribution by retail, apparel and textile sectors; (b) the introduction of sophisticated information links, forecasting capabilities and management systems inside apparel manufacturers as a shift away from price competition; (c) fundamental changes in manufacturing practices, especially at the assembly room; (d) focus on basic and fashion-basic instead of fashion products will provide long-term survival; and (e) keeping a range of production processes in the U.S. and Americas, especially Mexico and the Caribbean Basin, even with the full implementation of GATT (replaced by WTO later) and lower labour cost pressures from the Far East.

The authors cited above also suggested mapping the range of products by assembly complexity and value added strategy before the decision to outsource. This action helps to maintain sensitivity and strong leadership inside the chain.

However, these recommendations were not followed by the majority of companies and a significant number moved their production to Asia or adopted outsourcing, dismantling their plants. Anyhow, research on simplifying and computerizing product development and assembly continued to be incrementally funded.

Considering these global shifts in fashion clothing manufacturing, according to Faust et al. (2006), one of the areas that suffered more is related to sizing. The authors suggested that the gains in costs are not a good advantage if this action brings loss of consumer satisfaction. The parts involved in the manufacturing chain should have communication as clear as possible as well as the same level of commitment in relation to aims and benefits.

2.2.9.2   The International Production Systems

The apparel industry is identified as a buyer-driven value chain in contrast to a producer-driven one such as automobiles and computers. Moreover, the fashion industry is clearly a consumer-driver value chain.

In the clothing industry, the analysis of the development implications of global value chains is spread between standardised (basics) and differentiated (fashion-orientated) products.

The most important characteristic of production in the apparel industry is its dependence on intensive labour, due largely to the total fluidity of the material used, that makes the use of automation unfeasible.

As Gereffi (2004) explained:

The spread of global value chains has created a new level of fluidity in the international economy that appears to be having a profound impact on the quantity and quality of jobs generated throughout the world. The acceleration of outsourcing in the 1990s signalled the 'de-verticalisation' of the modern corporation, as defined in the 1970s by Alfred Chandler. Instead of continually growing in size and scope, the trend was for greater specialisation and focus on "core competencies". This process created new interdependencies between lead firms and suppliers as each value chain actor learned how to quickly and effectively combine district and complementary sets of capabilities with other actors in the chain. (p.2)

The analysis of value chains is especially suited to the apparel industry owing to the dynamic nature of the system. Gereffi (2003) classified the apparel value chain into five main parts: raw material supply, provision of components, production networks, export networks and marketing networks (Figure 2.20).
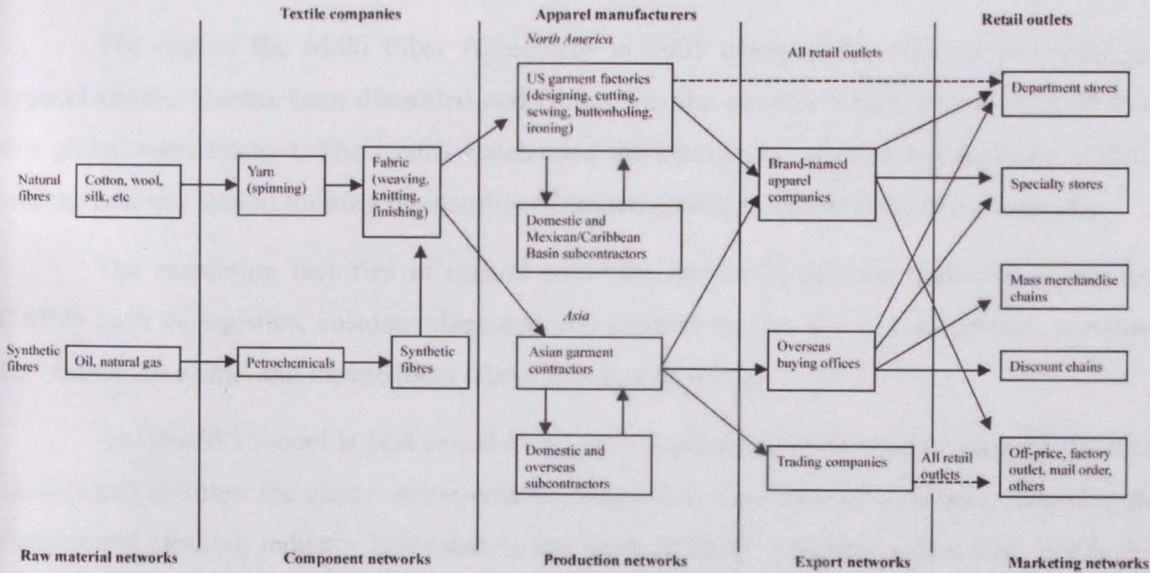
Figure 2.20 – The Apparel Value Chain

It is important to note that quite often the fashion value chain and apparel value chain have no correspondence. The field of knowledge also influences the specificity of the value chain. Fashion and design activities appear in marketing and management fields, as well as in art and the humanities. Clothing and apparel particularly relate to production and accountancy practices.

Figure 2.20 above, clearly ignored design activity inside any stage of the chain. The five parts of this value chain, although not stated in the study, are embodied in design activity and cannot be successful without its value.

Due to market globalisation, most companies have modified their strategy to become more competitive. The most common result in recent years has been the disassociation between creation and production known as 'de-verticalisation'. In an attempt to encompass both approaches (i.e. creation and production, which could be equated with 'fashion' and 'clothing') further theoretical material has been explored.

Gereffi (2003), in a study of the global apparel industry, has classified different international production systems into: (1) Original Equipment Assembly – OEA - a form of industrial subcontracting, in which the inputs for sewing the garment are provided by the buyer; (2) Original equipment manufacturing – OEM – a form of commercial subcontracting, in which a company makes a garment according to a design specified by the buyer; (3) Original design manufacturing - ODM – a form of upgrading from manufacturing to design and (4) Original brand name manufacturing - OBM – a form of upgrading from design to putting their own brand in the market.

The end of the Multi Fiber Agreement in 2005 changed the markets in textile and apparel chains. Quotas were discarded and China was the country which benefited most from this global consolidation. The results accelerated the emergence of more big factories (OEM), and the retailers started limiting the number of source countries due to costs and geography.

The remaining factories in central countries moved to provide higher-level services (OBM) such as logistics, customs clearance and product design. As a consequence, pressures for 'ethical sourcing' and independent labour monitoring arose.

As Gereffi's model is best suited to big organisations, another model can enhance local identity and abilities: the cluster arrangement. The most famous case of clustering related to the fashion and clothing industry is located in the north of Italy. The next subsection details this approach.

2.2.9.3 The Cluster Strategy

Porter (1990) introduced the concept of Cluster Analysis in his work *The Competitive Advantage of Nations*. Although this model is generic, focusing on the natural abilities and resources of countries or regions, it is particularly applicable to competitive advantage within Small and Medium Enterprises (SMEs).

The foundation of the model is based on the determinants of national advantage: factor conditions; demand conditions; related and supporting industries; and firm strategy, structure and rivalry. The combination of these four determinants, not in equilibrium but in a perpetual state of change, is named by Porter the 'diamond'. The systemic nature of the 'diamond', according to Porter (1990) 'promotes the clustering of a nation's competitive industries'. (p.12)

Often SMEs lack the capability to participate effectively and fruitfully in global markets (Pietrobelli and Rabellotti, 2004). The cluster model suggested that local companies cooperate regionally and network to gain strengths. Evidence from the authors showed that small enterprises located in clusters are able to overcome some of the major constraints they usually face: lack of specialised skills, difficult access to technology, inputs, market, information, credit, external services, etc.

Pietrobelli and Rabellotti (2004) said more:

Nonetheless, clustering can be considered a major facilitating factor for a number of subsequent potential developments, including division of labour and specialisation; and the emergence of a wide network of suppliers, of agents who sell to distant national and international markets, of specialized producer services, of a pool of specialized and skilled workers; and the formation of business associations. (p.4)

As the fashion industry is considered to be a fragmented one, clustering can be a valuable framework for communication between stakeholders and in the pursuit of competitiveness. Especially for small companies, participation in value chains can enable them to obtain the necessary information for upgrading and gaining access to global markets.

The upgrading processes can be one of four distinct types: process – the efficient transformation of inputs into outputs (implanting cad-cam systems); product – moving into more sophisticated lines (from basic clothing to fashion products); function – acquiring superior functions inside the cluster (from assembly to manufacturer); and intersectorial – moving acquired competence from one sector to other (from fashion clothing to accessories).

Hence, cluster analysis is important not only because it provides a precise way to define industrial landscapes, as argued by Feser and Luger (2003), but also due to the sustained industrial growth by groups of interconnected companies, suppliers, related industries and regional institutions.

According to Reinach (2005), the fashion industry is currently changing the paradigm with the emergence of Asian economies. The models of production are cultural and consumption models, and are moving from high creativity (prêt-a-porter) to low creativity (fast fashion). This fact can explain the rise of local small brands as opposed to global players. This discussion is pursued in greater depth in the next part of the chapter, in an analysis of the studies, theories and reports concerning change in the market that gave support to the framework pursued by this research.

As discussed in all subsections above, the complexity of the fashion clothing industry is high, especially due to the different fields of knowledge the industry should deal with in order to perform better. Culture, Communication and Consumption have important elements to consider in the equation for design products as they reflect directly the needs, wants and expectations of consumers. Clothing, Design and Art lend important features to the process of developing new products for the fashion industry as they have substantial impact on the performance of the designers. On the other hand, the equation is not complete without consideration of ideas taken from Marketing, Business and Manufacturing approaches, as they have crucial importance for company management.

The theories presented up to this point have been intended to clarify the viewpoint for the development of this research, and several of them will be used in forthcoming stages of the research. Furthermore, the concepts are not yet extensively introduced, and the next sections present two important considerations: focus development (section 2.3) and the national industries (section 2.4).

2.3   FOCUS DEVELOPMENT

This section presents the focus for research development. The first part (Section 2.3.1) discusses the reasons why case study is appropriate to reach answers for the research questions. Studies about the differences between Western and Eastern societies are presented in Section 2.3.2. The environment, and the changes in global exchanges are compared with local values in Section 2.3.3 and the distinctions between mature and emergent markets are discussed in Section 2.3.4.

The designer fashion sector is important as it responds to increasing consumer affluence and the subsequent global consumption of fashion products and services. Increasing global market competition has compelled organisations to be more responsive to the needs of the consumer.

No longer can they assume that markets are stable, or that the demand for their products and services will be reasonably predictable. Product Life Cycles have shortened and profit margins declined in many economic sectors. Customers, where they are manufacturers or consumers of finished goods, are more demanding in their requirements, forcing businesses to be more responsive to their needs (Davis and Scase, 2000, p.15).

The fashion industry has undergone significant restructuring and modernisation over the last ten years and has reinvented itself and adapted to many circumstances. Jackson and Shaw, in 2001, outlined the 8 drivers of fashion change: globalisation; greater media communication; pressured lifestyle; technology, democratisation of fashion; ecology; androgyny; health and wellbeing (Jackson and Shaw, 2001).

Clearly, further developments have occurred since Jackson and Shaw's work and these social and economic changes have affected the approach and practices of companies involved in these sectors and therefore should be incorporated into fashion education. The impact upon business structures and product development strategies has been dramatic, and continues to have far reaching effects upon all those involved in the business of supplying creative products. The forces of change have been strong, arising from increasing competitive infiltration from international sources into the national environment, rapid technological advancements and the demands of the increasingly sophisticated consumer (Abernathy et al., 1999).

Despite fashion industry claims, studies reveal that the consumer is not satisfied. A report from Kurt Salmon Associates (1999)[5] stated that European consumers feel that retailers do not care enough about them and neglect their needs. As explained in Chapter 1, the most dissatisfied consumers are the Germans (75%) and the least are the Italians (41%). The percentages are high and some investigation about the nature of these complaints is urged.

In the same research, when asked about their spending experience, the majority of European consumers (66%) stated that when they go shopping for fashion and clothing they already have a clear idea of what they are looking for. Surprisingly, 45% of the respondents said that they leave the shops empty-handed. The reasons given for this situation highlight, as a priority, sensitivity towards sizing and style as can be seen in Figure 2.21 below.

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[5] The research KSA European Consumer Outlook Survey 1999 investigated shopping and spending habits and attitudes of 2,500 women and men, aged 21 or plus, in Germany, France, the UK and Italy.

Figure 2.21 – Consumer Reasons for Leaving Empty-Handed

One of the problems that companies need to address is that variety does not mean diversity. If the majority of companies are offering the same range of products, or developing a new collection based on the same consumer needs brief, or even the same product attributes, a significant number of the consumers will feel frustrated that they cannot find anything in the market that they want. This kind of attitude just reinforces the lack of belief consumers have in companies, and their subsequent degree of dissatisfaction.

Jacobs and Stockert (2004) stressed the fact that 2/3 of fashion consumers from England, France, Germany and Italy know exactly what they want to buy and are willing to spend money. But only half of them can be satisfied.

According to Jacobs and Stockert (2004) the instrument called the 'target consumer' is an 'invention' that does not work efficiently. The authors said more, highlighting that market research as such does not lead to innovation:

> The target consumer is a guideline and a profile for the identification of customers of a brand. She should be like this artificial urban girl. In reality this target consumer constitutes just a small minority of all customers buying or willing to buy these brands, and the profile doesn't provide any information about their requirements. (p.7)

As there is already a considerable amount of research about Europe and the United States more investigations into emerging markets are urged. This emphasis on the mature markets is reflected in investment, although changes are happening constantly in relation to new markets.

Cultural values and demographic profiles also affect the way companies plan their business strategies. It seems to be necessary to explore both the differences and similarities between fashion consumers, in both mature and emergent markets.

As stated in the previous section (2.2), valuable studies have taken place, but the scope of this research is often very limited or does not include a comparative analysis between markets and consumers preferences. The subsequent subsections introduce literature that gives support to the design of the research and its scope.

2.3.1 A Case Based Approach

According to Yin (1994), case studies are the preferred strategy when the focus of the research is on a 'contemporary phenomenon within some real-life context' (p.7). The author made a parallel between the form of research questions and the research strategy. For him, case study is the most appropriate when the researcher investigates 'how' and 'why' things happen.

In this study the research questions lead to answers related to the way consumers behave towards fashion and clothing products and the reasons they have for preferring or disliking certain products.

The approach is based around investigating three different targets: consumers from the United Kingdom – a north-western developed society with a mature market; from Brazil – a south-western developing society with an emergent market; and from China – a north-eastern developing society with an emergent market (Figure 2.22).
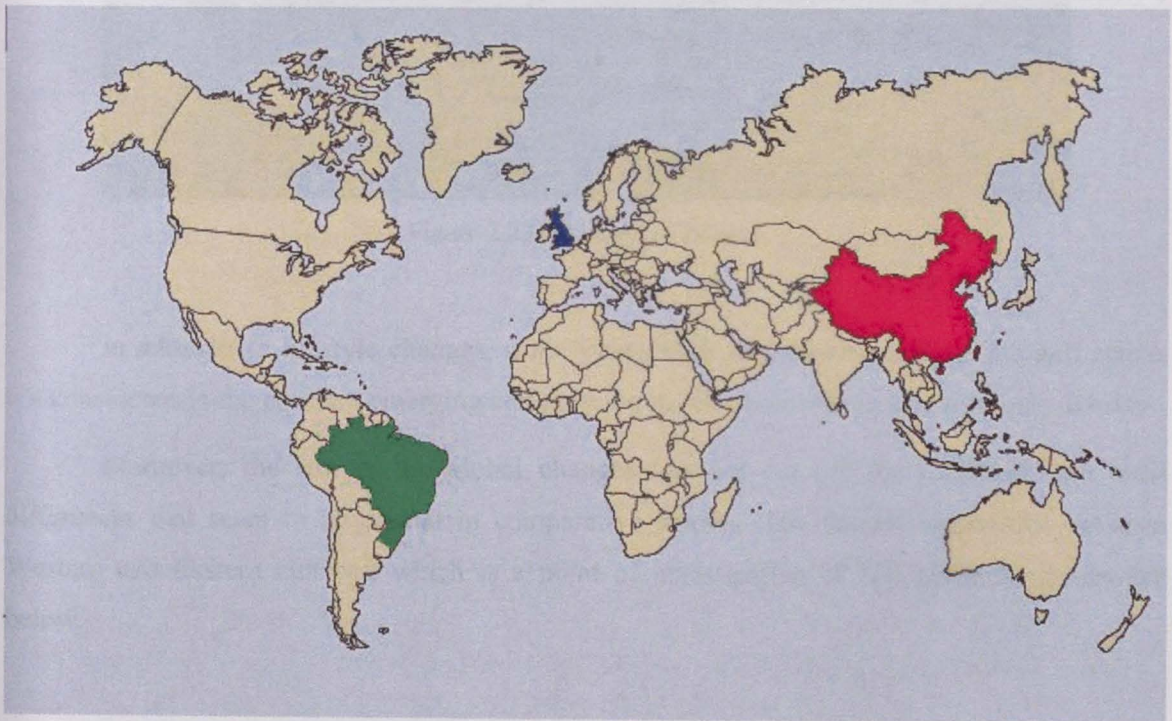
Figure 2.22 – The Three Case Studies: United Kingdom, Brazil and China

Despite other studies previously mentioned, this research aims to investigate a wider profile of consumers in order to find elements in fashion consumption that could be inferred and used in relation to a more inclusive and culturally diverse target market.

One of the reasons for this broader approach was the change that society has been undergoing recently. The advent of globalisation suggests an easier exchange between groups, but also may precipitate local nationalist attitudes.

Post-modern society, especially in Western cultures, has modified its values and lifestyle in such a way that consumption has also been influenced. A study from The Henley Centre (2002), as shown in Figure 2.23 below, stressed the distinctions between the traditional and contemporary ways of life.
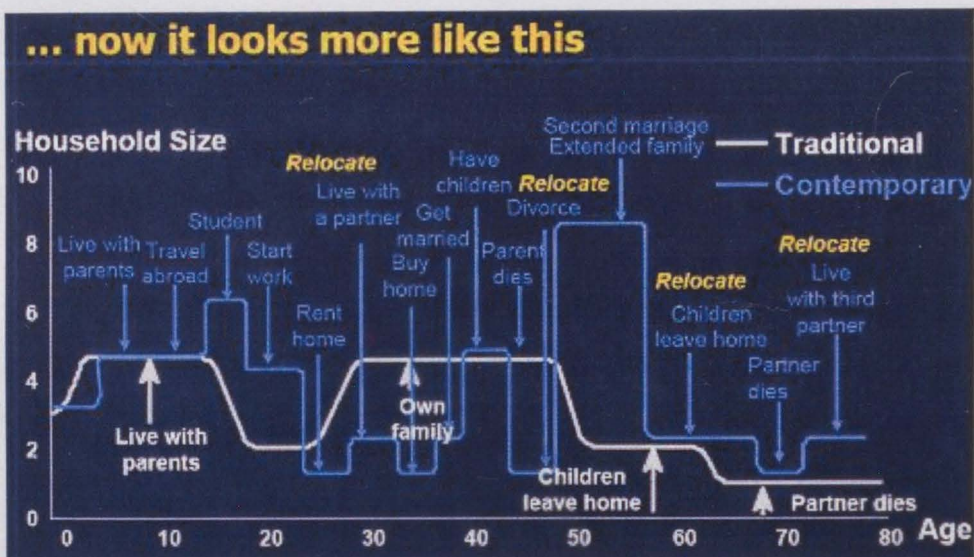
Figure 2.23 – Lifestyle Changes

In addition to lifestyle changes, some issues such as inclusiveness, ageing and ethics, not considered in the past, are emerging and growing in relevance within contemporary society.

Moreover, the rise of the global changes has not cut off the traditions and local differences that seem to be crucial in comparative studies. The 'stated' opposition between Western and Eastern cultures, which is a point of investigation of this research, is detailed below.

2.3.2 West versus East

In Germany, everything is forbidden unless it's allowed. In Britain, everything is allowed unless it's forbidden. And in France, everything is allowed even if it's forbidden. (Mowen, 1995, p.780)

The above quotation says a lot about cultural differences within three developed western European countries. The recognition of these distinctions in attitudes is one of the motivations for this research.

If within even a relatively narrow area of the globe such preferences and tastes differ, the distance is likely to be greater between Western and Eastern cultures. However, Mowen (1995) stressed that cultures are different from nations and while the latter can be precisely identified, the former cannot.

Broadening the vision and considering the Western view of the world, there is an opposite 'named' East, even if the boundaries are controversial. For centuries there has been contact between West and East. According to Partridge (2004), Eighteenth and Nineteenth Century Western philosophers were attracted to Eastern philosophies. The author added that this movement did not have an echo as an influence of Eastern ideas by the West but in an exotic parallel of the philosophers' own ideas.

Due to the establishment of fundamental dichotomies between Eastern and Western thought, relevant studies took place to map these differences. Krus and Blackman (1980 *in* Partridge 2004) categorised crucial distinctions in ideology using keywords, as can be seen in Table 2.7.

Table 2.7 – Distinction between Western and Eastern Ideologies

West style of thought	East style of thought
Analysis	Synthesis
Generalisation	Totality
Differentiation	Integration
Induction	Deduction
Objective	Subjective
Intellectual	Dogmatic
Reason	Intuition
Science	Anti-Science
Impersonal	Personal
Legalistic	Moralistic
Assertive	Non-Discursive
Power	Affiliative
Order	Ecstasies
Rational	Irrational
Critical	Imaginative

It is true that nowadays heterogeneous plurality in both West and East has increased and some of these extremes have been blurred. Globalisation brought the Easternisation of the West, and more recently the Westernisation of the East. Although the 21st century is characterised by information and economic exchanges, culture and tradition are far harder to change.

Another western 'invention', according to Rufin (1991) was World divisions. The first world was the capitalist, developed one, the second world was comprised of the communist nations – the Soviet Block and its satellites such as Vietnam and Cuba, and other communist nations such as China and Albania. The third world represented all of the other nations that could not fit into the previous two definitions. Although its geographic dispersion was immense, there was a large concentration in the Southern Hemisphere.

Although these nomenclatures no longer exist in practice, the reality shows clear discrepancies between West and East, North and South (Figure 2.24), especially towards wealth (north v. south) and attitudes (west v. east).

Figure 2.24 – The Two Lines that Define the World

In the consumption area and thinking about fashion products globally, the understanding of foreign cultures is a key consideration for competitiveness, resulting in consumer satisfaction. Considering the fact that in the near future more eager consumers will be joining the 'important' markets, some studies should be introduced, especially those involving consumption and culture comparisons.

According to O'Connor (2005), there is a straight correspondence between social and political shifts and changes in fashion since the studies of Richardson and Kroeber in the 40s. The author, however, pointed out the use of a simplistic modernity paradigm created in the 80s that said: 'Western fashion changes and is modern. Non-Western clothing is fixed, traditional and does not change.' (p.41). The author stressed that this argument cannot be sustained.

The term 'fashion' – that embraced elite and reactionary streetwear - was normally considered to matter more than 'clothes' – related to everyday wear or ordinary people – and not well studied in depth. O'Connor added more: there is a disproportionate number of studies about 'alternative areas' than the ones analysing mainstream culture. The privilege of some groups and subjects in contemporary studies or the approach based on old-style costume history created an analytical black hole.

Various reports, such as the one released by Goldman Sachs in 1999, alert the developed countries to the rise of some 'neglected' markets. The report created the acronym BRIC which stands for Brazil, Russia, India and China; the four nations that together, according to the authors, 'will outdo the current G7 in economic output in the next three to four decades.' (p.6)

Therefore, this research includes two of the BRIC's markets to investigate and compare with a European developed country. Moreover, the polarisation between global versus local is also a point of interest for this research. The next subsection introduces some of the literature on this subject, especially in relation to the fashion clothing industry.

2.3.3 Global versus Local

One of the strongest effects of globalisation was the dialectical rise of localisation to balance the equation. The fear of the homogenisation of culture as a consequence of the neo-liberal capitalist homogenisation of the world became an important issue.

According to Gereffi (1999), the economic activity in global capitalism is not only international in scope, but also in organisation. The author highlighted the difference between internationalisation and globalisation defined by Dicken (1998). The former referred to the geographic spread of economic activities across national boundaries, especially prominent with discoveries and colonial empires. The latter is more recent and implied the functional integration and coordination of internationally dispersed activities.

The model currently in use splits the economy by the horizontal line mentioned by Rufin (1991). The northern part could improve development by concentrating their efforts on technology and knowledge while the southern half struggles to develop through the use of intensive labour and use of natural resources.

Another approach was to consider the North as central nations with the active role of donor in opposition to the South as peripheral nations with a passive attitude, described as receivers. This vision, although it created a 'balance' for the world, created also a principle of dependence from the south in relation to the northern hemisphere (Figure 2.25).
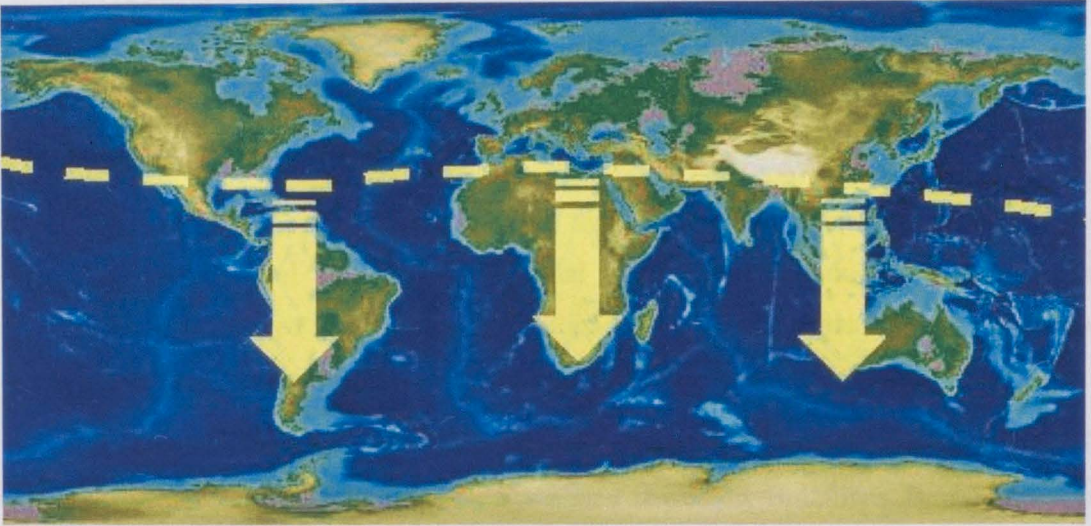
Figure 2.25 – Central and Peripheral Regions

According to Hines (2001), the phenomenon of globalisation is probably more transparently evident in the textile chain than in other sectors. The current structure of the fashion industry promotes shifts from Manchester to Manchuria, from Singapore to Sacramento (Figure 2.26).
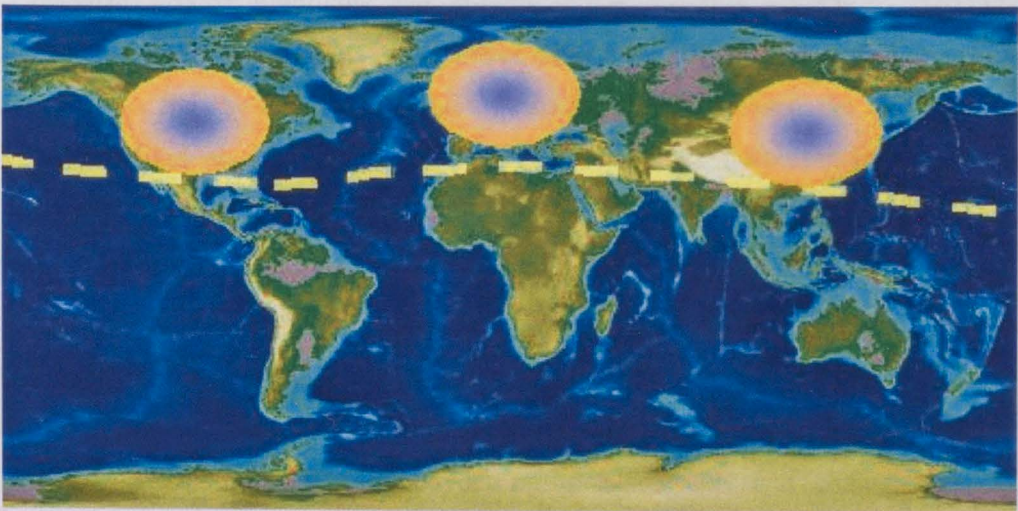
Figure 2.26 – The Big Economic Blocks

On the other hand of the globalisation phenomenon, where products and services have been 'standardised' by the Northern vision of the world, inspirations are coming from the most remote areas. This tendency of interest in tribes and exotic cultures seem to be a search for a 'new balance' in the world. Latin American, African and aborigine cultures, aesthetics and objects are often sources of inspiration for fashion and design trends.

This opposition of 'civilised' and 'barbaric' is also a sign of the level of consumption a society has. The next subsection discusses the concepts of mature and emergent markets.

2.3.4 Mature versus Emergent

According to Cooper and Press (2003), the textile chain is one of the most mature industries, and its survival depends on continual innovation in production technology and design. The authors stressed also that the textiles market in the UK is also mature[6]. In contrast, countries with emergent economies tend to have potential emergent markets.

In the last two decades globalisation has become an increasingly important issue. Top European brands are setting up their businesses aimed at wealthy Brazilians. Brazil joined with Russia, India and China is called BRIC, the four nations that together -- according to a Goldman Sachs report (1999) - will outdo the current G7 in economic output in the next three to four decades. This means that even more eager consumers will be joining the mass buying class (Trendwatching, 2005).

Cooper and Press (2003) explained the important and strategic role design activity can take on these dimensions by innovative approaches, offering integration and providing a coherent focus for the diversity of markets.

Prahalad (2005) highlights the starting point for this transition: 'talking about underserved consumers and markets'. The author named the potential for global growth in trade and prosperity as the 'bottom of pyramid'. Prahalad (2005) stressed the need to recognise consumers as individuals, as the four to five billion 'poor' are becoming part of a system of inclusive capitalism. The process of creating an involved and activist consumer is already emerging.

The idea is no longer to transfer the 'exceeding' of mature markets to the emergent ones, but to engage specific needs with global concerns. The growth of 'alternative' or 'ethical', 'critical' or 'political' modes of consumer action is rising everywhere. Sassatelli (2006) highlighted some examples such as boycotting global brands and chains, and classified consumerism as a 'negative' and 'positive' political action.

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[6] A mature market is the one with stagnated growth projections.

The 'green consumer' is already a reality, as 30% of the population of Denmark, the United Kingdom, Germany, Italy, Norway and Portugal are engaging in some form of consumer activism (Sassatelli, 2005). In the fashion industry, with garments being designed and offered to last no more than 3 months, how can anyone be environmentally friendly?

In summary, the fashion industry wants to expand into new markets as the original/traditional markets that understand the symbolic meanings of fashion become stagnated and demand more ethical products. On the other hand, the expansion of the fashion industry needs to understand the local specificities and be able to adapt to them. A blend of Global, Local, West, East, Mature and Emergent elements seem to be crucial to the development of better fashion clothing products in the current conjuncture.

The choice of the three countries – United Kingdom, Brazil and China – as the case studies of this research reflects the need of the fashion clothing industry to include more diversity in all sorts of visions to its decision-making processes: cultural, economic, aesthetics, anthropometrics, etc.

In order to supplement the build up of the research, the next sections introduce selected literature related to the countries chosen to be part of the investigation. The discussion includes each country's environment, its markets and its fashion clothing industry.

2.4 NATIONAL INDUSTRIES

Dress is a basic need like food and drink. Any country that cares about the independence of its strategic resources should be aware of this, in relation to the fashion and clothing industries; there are both cultural and economic risks in becoming dominated by importing companies.

Every country, although having its own specificities, needs to be competitive to raise its standard of living. Porter in *The Competitive Advantage of Nations* (1990) stressed that the premises of competition are dynamic and evolving. Competition is constantly changing due to new products, new ways of marketing, new production processes and the emergence of new market segments.

In the next three sections (2.4.1; 2.4.2 and 2.4.3) key points of the nations targeted by this study, United Kingdom, Brazil and China, will be discussed.

2.4.1 British Environment

Great Britain is a traditional country with a long historical background (compared to Brazil) and an acknowledged role around the world. Its empire, until the last century, enabled British influence to penetrate different societies. As a consequence of its former colonies, the United Kingdom nowadays has a multicultural society, with a population of 60 million, incorporating people from a wide variety of different backgrounds (Census, 2001).

According to Mintel (2005), the UK economy has slowed down. Retail sales have become very limited, having a growth rate of 0% to 1%. Although consumer debt reached a trillion pounds in late 2004, the UK is not in recession. In comparison with ten years ago, British consumers are able to afford higher levels of debt and they have borrowed to the limit.

Recently it was announced that the UK is the first country in the world to have more credit and charge cards in circulation - 75 million units - than the entire British population of 60 million (BBCnews, 26jun2006).

2.4.1.1 British Market

Not only British consumers, but also the majority of Western Europeans, have become more demanding in recent years. The market has reached a mature stage where innovation needs to be incorporated everywhere in order to stimulate demand.

European retailers such as M&S, C&A and Vroom & Dreesmann among others are experiencing some difficulties due to consumers demanding a product offer that is tailored for them (Mintel, 2005a). Department stores have broadened their products, presenting a wide range of goods and brands, or even creating exclusive brands targeting distinct lifestyles.

Traditional home shopping by catalogue is shifting to something more dynamic. The products have to be presented in a more fashionable way, and online home shopping is now very important.

The big challenge in the British fashion market came from the grocery sector. ASDA, Tesco and Sainsbury's launched their own brands (George; Florence & Fred and Cherokee; and Tu) and combined these with food essentials and electrical and other consumer products.

According to the Mintel report (2006b), the challenge for retailers is to offer a premium product: interesting enough and distinct from its competitors. The focus needs to be moved from price to product, shop environment and services. In addition, companies need to separate and identify their consumers better, as the same individual can be more than one type of consumer, depending on occasion or mood.

The proportion of disposable income of British consumers spent on clothing dropped from 7.5% in 1986 to 5.9% in 1997, and the fashion industry experienced competition from other consumer goods and services, such as computers, education, entertainment, and leisure pursuits (Infomat, 2004).

2.4.1.2 British Fashion Industry

The boldness of young British designers determines its avant-garde position in the fashion world. London Fashion Week is the major showcase event in the UK's fashion industry calendar and it has a significant impact on the European market (DTI, 2004). Graduate Fashion Week also helps to present new talents and an impressive amount of competition such as Topshop New Generation Designers, Fashion Fringe and Profile, among others, support emerging professionals.

According to Malcom Newbery's report (2003), there are approximately 91 fashion design courses in the UK, delivering around 3000 graduates every year.

The current British industry cannot absorbed all these professionals, creating an over supply situation. Initiatives in supporting these new generation designers to set up their own businesses is in current development, with remark to the Centre for Fashion Enterprise[7], the Fashion Retail Academy[8], regional development agencies and incubator programs.

On the other hand, the number of technicians has decreased and manufacturers in the UK claim difficulty in finding the professionals they need.

London Fashion Week is held twice a year and is known for showing established designer names in the UK fashion industry, and it is also recognised as a platform for launching new talent. British and European designers have traditionally dominated the UK's fashion market although American brand identities have become a major contributor to this market in recent decades (InfoMat, 2004).

Globalisation has resulted in the majority of the labour skills activities moving to the Far East, or closer, to Eastern European countries. The industry, nowadays, is essential outsourced, and the activities related to product development stop, sometimes before the samples, in the specification stage.

In summary, the British fashion industry is strong in creativity and offers, seasonally, several of the most 'wanted' products on Earth. The British market is one of the most mature in Europe and consumers are demanding ethical, inclusive and green approaches from brands.

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[7] http://www.fashion-enterprise.com/main.html
[8] http://www.fashionretailacademy.ac.uk/

2.4.2 Brazilian Environment

Brazil is a comparatively young country in South America with a population of 180 million. Brazilian cultural roots are predominantly from Portugal, but influenced by other European societies, as well as African and indigenous peoples. After World War II, North America became the foreign reference point for Brazilian people (Caldas and Alcadipani, 2003).

Some recent changes in internal politics and the recognition of Brazilian multiculturalism abroad seems to have reinforced the creation of a Brazilian style, but it is acknowledged that its society has a long way to go in trying to minimize the foreign influence on its own consciousness.

2.4.2.1 Brazilian Market

In Brazil, clothing consumption has been growing in direct relation to demographic growth (Bastos, 1993). In the past ten years a great change has occurred in the domestic market due to the Real Plan (change of currency) that promoted the increase of a low-income consumer demand. Also, due to the stabilisation of the currency, the price of clothing products has decreased and this has coincided with the arrival of Asian products, which, in turn, forced a lowering of prices. It is acknowledged that the Brazilian market is an emergent one, as the per capita consumption of textiles is almost a third of the average of industrialised countries (IEMI, 1998).

Although Brazil has a low rate of wealth distribution, the Brazilian middle class is large and corresponds to the markets of France and Canada together (Marins, 2000).

It was observed that the Brazilian clothing market is served by two main types of companies: (1) large corporations that operate in more than one strategic group (multi-brand companies), the majority of which are characterised as being foreign investment corporations; (2) small and micro companies which operate in only one strategic group, but vary in their market share, from luxury products to those without brand.

In the clothing industry, branded companies are those that act in proprietary strategic groups, and invest large amounts in research and development and product image, but have high profit return per product. Companies in generic strategic groups with no branded products are seeking new mass markets in order to expand through large volume production.

2.4.2.2   Brazilian Fashion Industry

In recent years, the Brazilian fashion industry has nurtured new professionals, exported burgeoning talents, and consolidated its design and textile industries.

Brazil is increasing in prominence as an important player in the global market. The Brazilian Textile Chain turns over around US$ 25 billion/year and includes the Brazilian Clothing and Fashion Industry (ABIT, 2003). The Clothing Industry is traditional and mature whilst the Fashion Industry is avant-garde and emergent.

One of the strongest characteristics of these two industries is that their production is directed towards the domestic market. There are approximately 60.000 companies within these industries and they are mainly established around traditional locations. The Clothing Industry in Brazil is the largest employer amongst all of the transforming industries (ABIT, 2003). Its size and rate of growth support arguments for a national policy aimed at the maintenance and enlargement of this industry.

The result is an industry which employs 1.4 million workers and had created 70 thousand new jobs by the beginning of this decade. Linked to these figures, there are initiatives from the Brazilian government and private associations aimed at connecting, promoting and strengthening self-sufficiency and a totally integrated solid production chain, from raw material development to a strong domestic market.

Brazilian brands have been developing a unique identity and adding extra value to the national textile and apparel industry. During the last few years, Brazilian fashion has become more modern, developing new professionals, exporting talent, consolidating its design, and integrating its textile industry. The creativity of designers, and company competitiveness is having an impact internationally, conquering the main retail markets and getting Brazil noticed on international catwalks (Sobotta, 2003).

Fashion professionals are not only self-taught entrepreneurs - they can also gain vocational education at 50 fashion colleges and technical courses spread over the country. These efforts to provide education are yielding significant results with regard to not only the international perception of Brazil and its products, but above all, giving the country the status of a new launch pad as producer and a potential exporter of fashion to the world.

In summary, the Brazilian market, although considered as an emergent country, is strongly influenced by European and North American brands. The local fashion industry is recent but presents signs of growth and international interest due to its creativity and the natural diversity of the Brazilian environment.

2.4.3 Chinese Environment

China, the most populous country in the world (1.3 billion people), has experienced continuing growth since its open market policy from 1978 with a current rate of 8% GDP per year (Ann, 2002). The immense market and growing demands have made companies review their attitude towards Asia. Urban concentrations are increasing, with new cities or developments boosting the market.

Cultural differences are significant between China and Western societies. The value placed on relationships in Chinese society overrides any monetary returns. Design activity is more graphics-led than creativity or concept-led, with an emphasis on drawing, painting and calligraphy, rather than problem-solving. Language structure and communication differ enormously from Anglo-Saxon or Latin styles. Both imperial and communist histories are respected in China and tradition is an important aspect of heritage.

2.4.3.1 Chinese Market

China is growing into the largest target market into which any company would like to offer products. The last two decades, in particular, have seen the rise of a middle class and a massive interest in Western products. However, inside China, there are currently many distinct groups of consumers that are geographically widely spread over this densely populated country. Cui and Liu (2000) suggested that consumers from different regions in mainland China have a diversity of attitudes, lifestyles and consumption patterns. The Chinese clothing industry is a world leader and there are some initiatives, albeit still limited, inside China to ensure that design is as strong as the ability to produce.

According to the KSA report Consumer Outlook Survey China (2004b), the Chinese consumer is becoming more aware about product quality and discerning about added value and pricing. The same study revealed that, in relation to clothing and footwear, the common consumer did not show any preference between foreign or local brands. But the scenario changes in relation to younger or affluent consumers who very clearly prefer foreign brands.

Another interesting point highlighted by the KSA report is that the majority of Chinese consumers do not consider shopping to be a pleasant activity. Both female and male consumers declared they did not enjoy shopping and try to avoid it, buying electronics and clothing just once a month or less frequently.

The profile of regular consumers in China is the new young generation, who have the opportunity to graduate. The ambitions of poor and less educated people are often restricted to survival levels or, at a maximum, the infrequent purchase of a new piece of clothing (Macartney, 2006).

2.4.3.2 *Chinese Fashion Industry*

China's global market share for clothing products has been rising rapidly. In the United States, for example, Chinese market share has increased from 10% to 70% in the last four years. China has an estimated 15 million employees and is the world's leading clothing manufacturer and exporter. The Open Door policy established in 1978 enabled western companies to move factories and start outsourcing contracts with locals or even in partnerships. Initially located in economic centres on the Pacific coast this industry has been encouraged by government to move operations to interior regions in order to prevent overload within the coastal cities (Garner, 2005).

Although the Chinese garment industry has great economic power, this is founded largely upon its sheer size. It is not technologically advanced, with an emphasis on a large labour force rather than automation, and brand and added value are not well developed in comparison with companies in developed countries. According to the report, China is an emergent market and people need some time to get used to luxuries (People's Daily, 2006).

When considering the role of education in the enhancement of clothing manufacturing towards a fashion industry, statistics reveal that China has a high number of design schools (in all fields) and 10,000 graduates each year (Tharp and Munson, 2005). However, finding employment in design is not an easy task. Many manufacturers do not see a need for talented designers and the culture of 'made in China' is far stronger than that of 'designed in China'.

The China Fashion Week has been held in Beijing since 1997, as a biannual event, and some initiatives are being implemented to nurture new talent. At the same time, the western style fashion culture is being introduced by fashion magazines such as Elle and L'Officiel, and recently, in September 2005, Vogue China magazine was launched with a massive campaign and slogan 'The fashion bible' hinting at religion, an issue not open to discussion in the country.

In summary, the Chinese market presents significant recent changes, as it has developed from a mainly rural economy to become completely industrialised in some regions. These changes have also occurred in the fashion sector, with the partnership of European and North American brands. The new generation of consumers represents a potential 'boom' for the fashion clothing industry, especially when linked to Western values.

2.5 JOINT PERSPECTIVES

A lot of progress needs to be made in the fashion industry in order to maintain its leadership. One of the greatest difficulties that this industry has is related to communication between stakeholders. Designers seem to create collections based entirely upon their own view of customers' requirements. Marketing teams seem to display and advertise what they understand as more profitable. Manufacturers seem to prioritise their interest in lowering the cost and complexity of production. The consumer, on the other hand, seems to search for something that may give him/her satisfaction. Following careful research of the issues, it seems to be possible to offer useful guidance to fashion and clothing companies on how to maintain or increase their market share in a competitive and fast-changing marketplace.

Originating from the textile, clothing and fashion industries, companies have carried themselves recently into the universe of global design and are accessible via the net or through laboratories and personalised services provided by diverse specialised agencies. These studies provide interesting access to the type of information that the firms lack on tastes, needs, desires, attitudes, opinions and the interests of consumers and the most relevant social groups (Branco et al., 2000). The consideration of local differences and global similarities can give support to the development of a better model to guide product development processes within the fashion clothing industry.

This literature review has demonstrated the complexity of the fashion system and different ways to see and deal with the variables that form the process of design development for the fashion clothing industry. Moreover, the literature has also demonstrated the influence the environment can have within consumer choice. Besides, this chapter has shown that although fashion is increasingly studied from very diverse points of view, there are still gaps within the literature. In particular, the bodies and attitudes of 'real' consumers, need to be taken into account in order to design inclusive fashion, for all ages, incomes and body types.

The next chapter will explain the research methods developed in this study in order to fill this information gap. Moreover, the research framework will be detailed, from data collection to analytical procedures, with the intention to make possible a worthwhile contribution to knowledge.

CHAPTER 3 – RESEARCH METHODS

This chapter describes the methods of investigation used in this research. It is divided into sections and subsections in order to facilitate the reader's understanding of the way in which the research was conducted. The first section (3.1) presents current research in fashion consumer behaviour, followed by a brief presentation of the researcher's previous work, which is relevant to this study. The second section (3.2) is related to the analytical units adopted to develop the investigation, the following section (3.3) presents the qualitative and quantitative descriptions of instruments, variables and procedures. Section 3.4 presents a visual summary of the procedures and techniques, and the last five sections (3.5 to 3.9) relate to additional information necessary to ensure the accuracy of methods and approaches adopted in the development of the research.

As stated before, significant studies about fashion consumption, with a special focus on marketing, have enabled companies to draw on insights and recommendations made by previous researchers.

This research starts from the principle that one of the members of the triumvirate: consumers, designers and companies, cannot ignore the others without the risk of the common stakeholder's satisfaction objective, being lost.

In order to ensure the appropriateness of this research, the interests and practices of the three stakeholders were investigated through the collection and analysis of data. This set of actions demanded a holistic perspective and the interdisciplinary use of a wide diversity of theories. The nature of the variables under analysis, tangibles and intangibles, required the application of various qualitative and quantitative methods that are detailed in the subsequent sections.

3.1   CONTEMPORARY RESEARCH STUDIES

In the last two decades researchers have put considerable effort into defining fashion and clothing attributes. Research that is relevant to this study is that, which investigates any sort of need from the consumer's point of view. Although some of the work is considered to be extremely important, their sample focus is possibly subject to bias and inaccuracies in the use of qualitative methods of analysis. This is because of both the small number of interviewees involved and the emphasis on particular target groups.

Several studies also contributed to the motivation for this research. Relevant models consider functionality, ergonomics and aesthetic factors as separate issues, and provide limited overviews that link these psychological, social and cultural dimensions to fashion and clothing product development (Lamb and Kallal, 1992; Benktzon et al., 2003).

The work of Lamb and Kallal (1992) aimed to develop a framework for fashion design education, using consumers with special needs as the focus of the research. The outcome model, named FEA (Functional, Expressive and Aesthetic), according to the authors, can give support not only for consumers in specific targets, but for all activities related to apparel design. The work, although it used three distinct case studies (sports, professional and health constraints) does not present a specific dimension (variable) related to the human body, anthropometry or ergonomics.

On the other hand, Benktzon et al. (2003) researched female consumers with osteoporosis and mainly studied physical variables. The outcomes suggest shapes and awareness of Fit and Comfort in order to increase quality of life through clothing, even though social and individual aspects were not taken into account in this specific product design development process.

Research involving older consumers is increasingly a subject for investigation due to the ageing demographic profile of European societies and their high demands in terms of fashion product attributes (Li, 2003; Iltanen 2003, 2005).

The work of Li (2003), aimed to investigate clothing design for the active grey market, analysing the female body post menopause, which concluded that not only physical changes occur, adding emotional variation to the equation. Quoting secondary empirical studies, the author suggested that designers should pay attention to lifestyle, colour, fit, comfort, fabrics and styling.

Some research also indicates that fashion designers need to become more aware of the ageing population's psychological need to express their individual style and taste through a choice of better quality products. Iltanen's research (2003) explored the relationship between fashion designer practices and stereotypical views that designers have in relation to the taste of older consumers. In a subsequent study (Iltanen, 2005), a focus group was carried out with female Finnish consumers on their favourite clothing, these groups discussed selected garments chosen by designers for women aged 50 to 60. The outcome was that, the designers, tended to choose garments that covered the body: high necklines, long sleeves, longish tops, with all garments tending to be loose fitting. The investigation focused on aesthetic and expressive features of the garments, such as colour, texture, shape, fit and the visual, although the author stressed an equivalent importance needed to be given to functionality.

88

Another very interesting study conducted by Zhang et al. (2002) related to the importance of product attributes for casual wear garments, carried out with Chinese consumers from six distinct regions of the country. The authors identified 15 attributes and tested them out using questionnaires with around 3,500 consumers. The top five most important attributes were Fit, Comfort and Style, in contrast to Fibre Content, Warmness and Fabric Thickness. The attribute preferences were tested by geographical and demographic factors, as well as age, gender and income, amongst others. The authors suggested four factors as the determinants when making apparel purchase decisions: Function, Appearance, Symbolism and Price.

Very recently, a study from Canada (Faust et al., 2006) demonstrated the difficulties consumers face relating to body shape and sizing when choosing ready-to-wear trousers. The outcomes identified consumer frustration relating to ineffective company consideration of consumer diversity and physical characteristics, as well as the imprecise advertisement the companies used to promote products to their main target groups.

Finally, the number of studies that intend to offer better consumer satisfaction through product development within fashion and clothing industries is high and diverse in focus. A lack of studies was identified concerning national comparisons between consumers, which is especially important given the phenomena of market globalisation. Moreover, the complexity of the fashion clothing industry, sometimes due to methodological constraints is not fully considered.

The next section introduces motivation for the development of this research and the adoption of the methods used in previous related research.

3.1.1 Researcher's Previous Studies

Since 1995 the researcher has been exploring ways of better understanding consumer behaviour within the fashion clothing industry. An outcome of her Master of Science in Production Engineering was the creation of the *Indicators for Fashion and Clothing Consumption* (see Table 3.1 forward).

In this previous study into fashion and clothing consumption, Rocha (1999) revealed the most important influences on the outcomes of consumer choices in Brazil. These results were derived from qualitative and quantitative research carried out using a sample of 380 Brazilians from Recife, one of the largest regional capitals in the northeast of Brazil.

Subsequently, in 2002, a further sample of 820 Brazilians from four Brazilian cities (Rio de Janeiro, São Paulo, Curitiba and Recife) was collected as a comparative study of differences and similarities among other regions of the country.[1]

The results of this research stimulated the search for an understanding of consumer behaviour with a global perspective. All the changes within the product and business chain resulting from globalisation seem to have an influence on consumer choice and levels of satisfaction, and it is from this perspective that this research was designed.

3.1.2 Fundamental Research Design

The research was designed considering three phases; the first phase comprised of an extensive investigation of consumer behaviour for fashion clothing products. The data analysed supplied input for building a model.

The second phase related to an inquiry into practices by designers and companies, at this stage, a comparative analysis was made with the consumer's requirements in mind.

The last phase of the study was to find a way, through an interface, to facilitate the synergy between consumers, designers and companies. Figure 3.1 below illustrates the design of the study.

The motivation started with the previous studies carried out by the researcher in Brazil (light pink area in Figure 3.1). Afterwards, this research actually began with the consumer research task, firstly in the UK, followed by the Brazilian investigation and then carried out in China. This phase (light blue area in Figure 3.1) generated useful consumer databases linked to the achievement of several theory model tests introduced in Chapter 4.

The second phase of the research (light yellow area in Figure 3.1) comprised of investigations into designers and companies from the three targeted countries, producing specific data to assist in the analysis of the stakeholders and in the modelling of the theory.

The last phase (light green area in Figure 3.1), where the biggest contribution to knowledge is expressed, was made by the combination of results and the interpretation of an interface between the stakeholders. The result is the *Fashion Polyhedron* tool, presented in Chapter 5.

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[1] This study was sponsored by a Regional Research Support Agency (FACEPE - Fundação de Amparo à Ciência e Tecnologia do Estado de Pernambuco) in the northeast of Brazil.
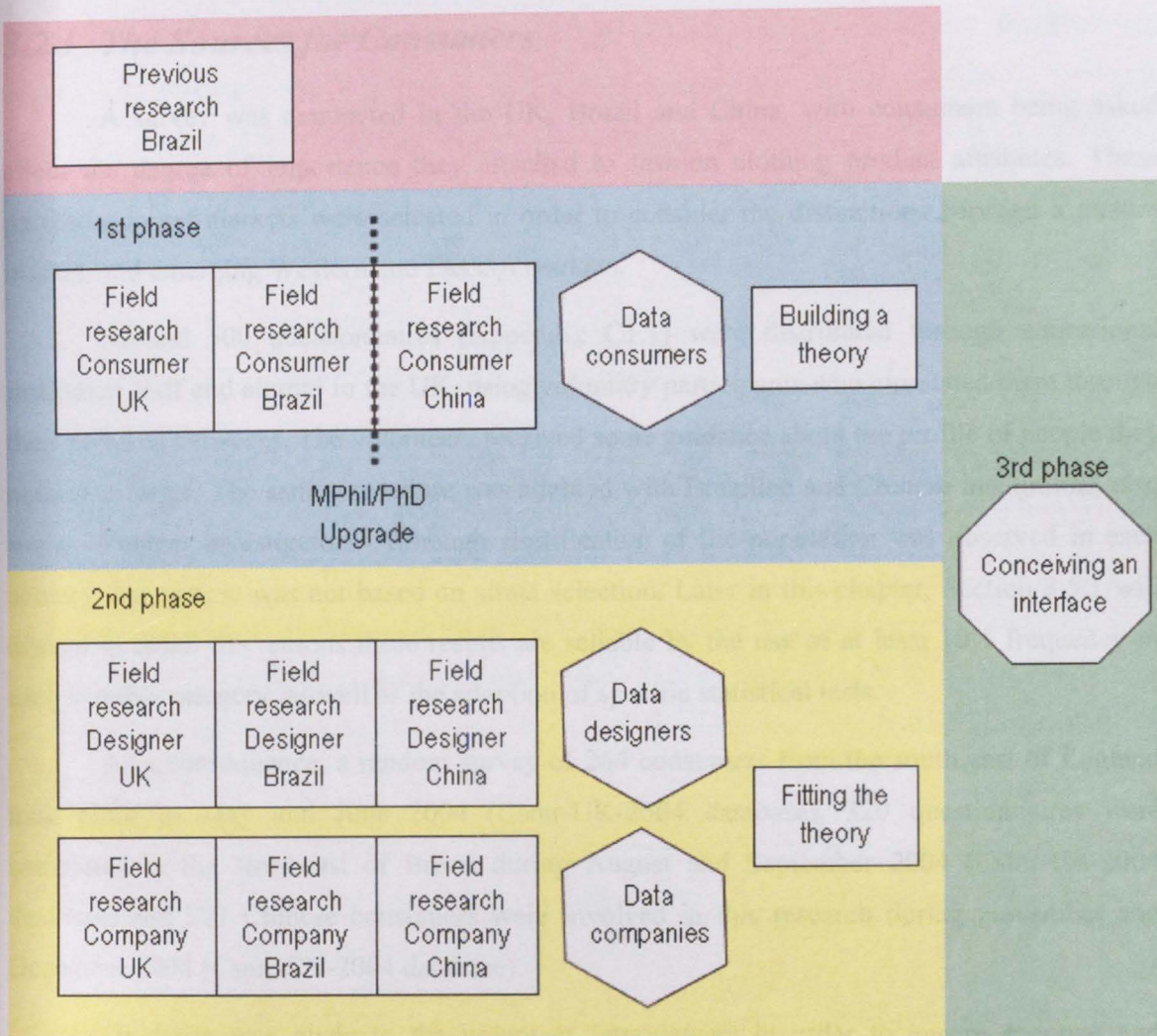
Figure 3.1 – Phases of the Research

As discussed in Chapter 2, theories with distinct backgrounds, from sociology to strategic management, were used to analyse the data and then provide support for a more balanced business/designer/consumer–led approach to fashion product development.

The next three sections explain the theoretical framework used to understand the distinct expectations of the three targets of this research: consumers (3.2); fashion designers (3.3) and companies (3.4).

3.2   CONSUMER SURVEY

This section presents the methods and subjects used in the analysis of consumer information acquired by using questionnaires. The first subsection will explain the sources of the data collected, followed by the tools, approaches, procedures and samples.

3.2.1 The Sources for Consumers

A survey was conducted in the UK, Brazil and China, with consumers being asked about the degree of importance they attached to fashion clothing product attributes. These particular target markets were selected in order to consider the distinctions between a mature market, and emerging Western and Eastern markets.

Around 500 questionnaires (Appendix C1.1) were distributed through educational institution staff and alumni in the UK, using voluntary participants who circulated them through their personal networks. The volunteers received some guidance about the profile of people they needed to target. The same procedure was adopted with Brazilian and Chinese institutions, also using volunteer investigators. Although stratification of the population was observed in each country, the sample was not based on strata selection. Later in this chapter, Section 3.5.1 will discuss in detail the reasons these results are reliable by the use of at least 10% frequency in each variable category, as well as the adoption of specific statistical tests.

As a consequence, a random survey of 264 consumers from the south east of England took place in May and June 2004 (Csmr-UK-2004 database), 320 questionnaires were completed in the Northeast of Brazil during August and September 2004 (Csmr-BR-2004 database) and 227 Chinese consumers were involved in this research during November and December 2004 (Csmr-CN-2004 database).

Guidance was given to the volunteer interviewers in order to ensure accurate and unbiased data collection. In all cases, distribution of the questionnaires needed to occur in a fashion and clothing consumption free environment.

All consumers were at least 15 years old on the assumption that most had some income and could choose without parental influence. The surveys included both genders and the consumers needed to have permanent residence in the country. The nature of the surveys was in no way selective and all consumers were welcome. The consumers' profiles were mapped based on socio-cultural, socio-economic and socio-physical information provided by them. All the survey profiles are presented in Chapter 4, section 4.1.

3.2.2 Tools for Consumers

A survey was conducted in the UK, Brazil and China, with consumers being asked about the degree of importance of fashion clothing product elements. The elements in study were the *Indicators for Fashion and Clothing Consumption*. This approach was selected to consider that the distinctions between a mature market, an emerging western market and an eastern market should emerge.

92

All the raw data gathered was stored into specific databases and later classified and treated. The database creation is one of the initial test phases according to Churchill (1999). At this stage it is possible to code and tabulate the questionnaire and to determine the codebook to be used when processing the questionnaires. The following subsections present the detailed procedures undertaken with the data, in order to assist the research investigation.

3.2.2.1   The Pilot Consumer Questionnaire

A pilot test took place from the 12th to 21st April 2004 to ensure the clarity of the language used in the questionnaire. Ten students from BA and MA courses in Fashion, Design and Photography at Kent Institute of Art & Design were involved.

Half of these students/consumers did not have British nationality but all could give opinions on some statements and suggest changes to the questionnaire. It was interesting to observe the curiosity and surprise experienced by these consumers about their own choices in relation to dressing.

Two different sections formed the pilot questionnaire; the first considered consumers' thoughts on fashion clothing (dependent variables) and the second considered the personal information of the consumers (independent variables).

The 28 indicators found in previous research (Rocha, 1999) guided the formation of the majority of the statements in section A. With the research carried out in the UK, for qualitative reasons, three more statements were added regarding the relationship between gender and dressing and exclusivity. In the first section of the questionnaire it was decided to use a five point Likert scale to classify the consumers' answers by level of agreement.

In the first section, the pilot consumers had difficulty thinking in a negative-positive way, as the pilot questionnaire gave options from totally disagree to totally agree. In addition, it was noticed there was a tendency for the consumers to mark the neutral answer (not aware of). It was decided, based on Churchill (1999), to change the direction of the options (and take care when decoding these answers into the database) and to remove the neutral option, reducing the scale from 5 to 4 (totally agree, partially agree, partially disagree and totally disagree).

Because of the feeling that a number of statements seemed to be superficially very similar, some of the consumers became bored due to the length of the questionnaire. As a result, at the beginning of the final questionnaire, more of an explanation was given on the importance of all the questions in order to validate the research.

In relation to the second section, the question about income remained unanswered by more than half of the respondents, demonstrating a natural resistance to answering questions on this subject. The anonymity and academic purpose of the information gathered was emphasised in order to try and break down this resistance.

In analysing the consumers' answers, some cultural differences about dressing were identified, so it was decided to add a question about religion on the final questionnaire form.

3.2.2.2   The Final Consumer Questionnaire

After the pilot test, adjustments were made to the questionnaire in order to provide a better understanding for consumers about what was being requested. The introduction to the questionnaire explained the purpose of the research and the ethical issues.

Section A consisted of the statements relating to fashion clothing consumption followed by two open questions about the respondent's favourite clothing and any other fashion issue considered relevant to the consumer. The statements corresponded to the 28 *Indicators for Fashion and Clothing Consumption* from the researcher's previous work (Rocha, 1999) with the addition of three new indicators (explanation on section 3.3.2.1). As a result of the content analysis of the British consumers' open answers, seven new indicators were added to the Brazilian and Chinese surveys.

Section B of the questionnaire, referring to the profile of the consumers, was built based on socio-cultural, socio-economical and socio-physical variables, adapted to the reality of each target group and the data available from government (Census) and local research institutes[2].

The multichotomous questions comprised of Gender, Ethnicity, Religion, Age, Education, Income, Weight, Height and Body Sizing. The questions about anthropometric data were divided into open questions about Height and Weight and three questions about sizing (top, waist and bottom measures) were based on fashion clothing retailers' websites and magazines with a wide circulation[3].

Next subsection presents in detail all the content of the consumer questionnaire, as well as the nature and purpose of each variable adopted by this research.

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[2] Census 2001, www.statistics.gov.uk; Censo Demográfico 2000, www.ibge.gov.br; National Bureau of Statistics of China – Census Data 2000, www.stats.gov.cn
[3] Marks and Spencer, Debenhams, Topshop.

3.2.3 Approaches for Consumers

This section presents the data elements (variables and constructs) collected from the consumers in order to make possible the analysis of differences and similarities between groups.

Section A of the questionnaire was dedicated to the *Indicators for Fashion and Clothing Consumption*, these are introduced and analysed in subsequent subsection 3.2.3.1. Section B of the questionnaire was designed to gather information about the profile of the respondent and is discussed in the following subsection 3.2.3.2.

3.2.3.1 Indicators for Consumption

The measurement of consumer preferences within fashion clothing products was made using the *Indicators for Fashion and Clothing Consumption*. Firstly, they were a group of 28 indicators that arose from previous research. Three more indicators were added during the first stages of the investigation of British consumers. After the application of the questionnaires within the UK survey, seven more indicators were added to the group. The explanation about these additions is discussed in Chapter 4, Section 4.4.1.

Table 3.1 presents the final 38 *Indicators for Fashion and Clothing Consumption* used in this research as well as the statements presented to respondents in order to measure their attitude toward fashion clothing consumption. Table 3.1 shows the explanation, representation (image) and interpretation used internally for the research in order to help clarify what was intended to be investigated. This approach also helped in the formatting of statements presented in the consumer questionnaire.
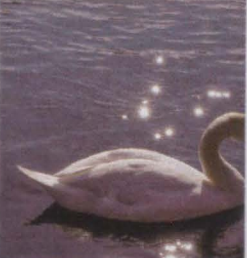
Table 3.1 – The Indicators for Fashion and Clothing Consumption

Indicator	Statement measured	Explanation	Representation	Interpretation
1. Age Appearance	**Some clothes make me feel/look younger or older.**	The attempt to get help from dressing to appear younger or older.		The lens represents an accurate way to check people's real age, sometimes hidden by dress style or behavioural attitudes.
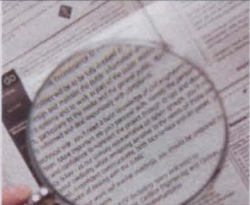
2.	Attraction to Particular Clothes	I cannot explain why I like some particular clothes.	The feeling of "falling in love" with a product and without any rationale to justify the choice.		The metaphor of buttons represents "I cannot live without it".
3.	Balance/Fit	I consider the shape of the clothes when I'm choosing them.	This indicates the relation between the product and the body.		The measuring tape represents the need for precise geometric skills and commercial sizing.
4.	Beauty	I believe that all clothes I wear make me look more beautiful/ handsome.	It is a complex concept related to the aesthetics of the product for the user.		Although beauty standards vary with groups and time, natural forms such as a flower are consensual examples of beauty.
5.	Beliefs*	My religion has an important role in my wardrobe choice.	This indicator is related to the user beliefs and its implications or recommendations on style of dress.		The sun, the brightness, the light, something that can lift believers to a higher level.
6.	Be Noticed	I love to receive compliments about my dress style.	This indicator measures the willingness to stand out from the crowd through dressing.		The joker is part of the pack of cards which always has a "special" appearance and can offer distinction to the player.
7.	Body Exposure	One of the functions of clothing is to hide or show my body.	It is related to how much a user wants to show or hide his/her body.		The spiral shell is a metaphor for garments using the mollusc's shelter.
8.	Boldness	Clothing/fashion has the function to shock and change minds.	Is related to the unexpected performance or appearance a garment can provoke.		A chip is an incredible small artefact with a wide and powerful application.
9.	Brand	In my opinion, brand is more important than product.	This indicator is related to the intangible aspects of the brand and its meanings.		The empty perfume bottle represents the absence of a real product in it.

10. Celebrity Influence*	I like to be dressed similarly to some celebrities.	This indicator refers to the endorsement that stars, VIPs or famous people can give to products and thus influence consumption.		A festive ball shows the glamour induced by a celebrity's influence and its ephemeral character.
11. Climate	I consider the weather when I'm choosing clothes.	This indicator is directly related to the temperature of the environment the user is in, independent of the season.		The heating element represents the possibility to have cold or hot water.
12. Colour	Colour is something very personal in a clothing-choice.	This indicator is related to the subjective preference for colour in garments.		The balloons show some combination of colours.
13. Comfort	I only buy comfortable clothing.	The state of being comfortable physically and the freedom to move without constraints.		Feathers lead to light and soft actions and movements.
14. Durability	I always look for clothing that is hardwearing.	It is related to the expected life of a garment.		The pocket watch shows the time running, with garments being washed or cleaned several times or becoming out of date.
15. Ease of Care	Easy care is an essential element in my clothing choice.	This indicator is related to the ease or difficulty the user can encounter when cleaning, washing and pressing a garment.		Clothes pegs are an image that immediately evokes the laundry environment.
16. Elegance	Some clothes can make me more elegant and influence my behaviour.	A refined appearance or graceful movement that the garment can give to the user.		The fable of the little ugly duck and the royal swan gives an example of prejudice and elegance.

17. Exclusivity	I hate to find someone dressed the same as me.	The uniqueness of a garment, measured by its scarcity.		A key should fit only in one lock as a metaphor for a garment to a user.
18. Fabric	I have some preferences about fabrics and fibres.	This indicator reveals the attributes of the raw material for any garment.		A nest of fibres illustrates different natures, woven constructions, textures, touch, finish appearance, etc.
19. Fashion	I think clothing cannot be separated from fashion.	Is related to trends and ephemeral aspects embodied in a product.		A ribbon cable can became a belt for a season and returns to be just an electrical item soon after that.
20. Functionality	Before I choose clothes, I think about what I want them for.	The functional aspects between the user, the garment and the activities that can be executed wearing that product.		A pair of pliers is a good metaphor for the precise characteristics that sometimes are required from a garment.
21. Health	I think some clothes may help or damage my health.	The effect that a garment can have on healing or causing body damage to the user.		Pills can heal as some undergarments promise to moisture and sanitize the body using nanotechnology.
22. Ideology*	Social projects for minorities inclusion is a supplier of my clothes.	A specific meaning or idea that can be "read" by the choice of garment.		A magnifier can "translate" the hidden idea behind a special way of dressing or style.
23. Image Judgement*	People are judged by what they wear.	It is a concern about what others will think about you based on your dress style.		A CCTV camera represents the never-ending surveillance within society.
24. Mood*	My mood can influence the way I choose to dress.	It is related to the state of spirit of a person and its reflection in clothing.		A pepper is expected to be hot, but can be sweet, depending on the type.

25.	Moral Conventions	I dress myself because I cannot go out naked.	This indicator is related to the unwritten rules in societies and the sensibility towards breaking them.		Rules not stated can be as slippery as a banana skin.
26.	Opposite Gender	I care more about what I wear in a "mixed sex" environment.	This indicator is related to the awareness of the user of members of the opposite gender around him/her. It includes a sexual awareness and desirability.		The plug adaptor shows a clear distinction between males and females.
27.	Personal style	My dressing style is unique.	This indicator is related to the user's individual choices.		A metaphor between add or delete in the keyboard.
28.	Physical Adequacy	I look for clothes that suit my body shape.	Everybody has a different set of features, classified by biotypes.		All stones naturally have different shapes, as bodies have.
29.	Price	Price is an important factor when choosing clothes.	This indicator is related to the amount of money the user is prepared to pay and its cost or investment benefit.		The Red currency box represents the savings spent or saved.
30.	Profession	I adopt my professional dressing style even when I'm not working.	This indicator is related to the occupation of the user, his/her status and job position and its implication on garments.		A paint brush illustrates the imagination in an artistic way of dressing.
31.	Quality	I only wear high quality clothes.	Is related to the consistency and conformity of users' expectations.		Car lamps should light properly, safely and be long lasting.
32.	Racial Roots*	My origin/ethnicity is important in my dressing style.	It is related to origins and racial roots and their derivation in costumes.		A natural bath sponge shows the unique structure of a vegetal body.

33.	Same Gender	I care more about what I wear in a "single sex" environment (same as me).	This indicator is related to the way the user behaves in a single gender environment. It includes competition for sexual partners.		The die represents the different sides of the same gender.
34.	Seasonality*	I try to dress according to the seasons.	This indicator is related to the natural changes in the environment and the fashion establishment of a new collection/wardrobe according to season.		Spring time and blossom time stimulate a substantial change in dressing and behaviour.
35.	Sensuality	I often look for products that may make me more attractive.	This indicator is related to desirability and attraction, not sexuality but admiration.		The shape of the tape shows that anything can be sensual or delightful.
36.	Taste	If I like some clothes, nobody can convince me to alter my choice.	This indicator is related to the faculty of discerning what is aesthetically excellent or appropriate.		A chocolate cake is something delicious and loved by everyone who can eat it.
37.	Versatility	I prefer clothes that I can combine in a variety of ways.	Some garments have the capacity of being worn on a variety of occasions or ways.		The screw is a device that fits into endless pieces of equipment and can be used to fix, to blend, to hang, to join, etc.
38.	Welfare	I love clothes that make me feel good when I am wearing them.	This indicator is related to the state of well-being of the user in relation to the garments, a feeling of happiness or a satisfaction, more psychological than physical sometimes.		A lollipop gives a remembrance of childhood, contentment, prosperity.

* Indicator not collected in the UK survey

The process of choosing all these images displayed in Table 3.1 involved a qualitative analysis of the consumers' imagination blended with the cultural view of the researcher. This came from the necessity to supply visual messages for designers. The main idea was to find images outside of fashion clothing imagery in order to allow freedom and creativity in the process of understanding and analysing these indicators.[4]

This exercise to create an image bank was inspired by the study carried out by Wilson (2005) with girls and videogame design as well as the Mood Check tool applicable for trends and forecasting developed by the French company Style-Vision (2004). Both works used images to facilitate the communication with consumers, although it is important to stress the cultural background an image carries. The regular attendance at Li Edelkoort's Trend Union seminars during the period of this study also inspired the creation of the image bank shown above. This demonstrates the better the choice for a specific target, the better the understanding of the message. In this research, in contrast to the studies mentioned, the process of choosing images was merely methodological, with no intention of showing them to interviewees.

After the explanation of the nature of the *Indicators for Fashion and Clothing Consumption*, it is time to move to the clarification of the other variables used within this research: the consumer profile. The next subsection introduces the consumer variables.

3.2.3.2   *Consumer Profiles*

Section B of the questionnaire collected the personal data of the respondents in order to assist with the map of consumer profiles. The variables presented below constitute those necessary to map and trace the consumers' profiles in accordance with the purpose of this research; these are *Gender*, *Ethnicity*, *Religion*, *Age*, *Education*, *Income*, *Height*, *Weight*, *Body Mass* and *Body Shape* and are defined in the following paragraphs.

Gender

Consumers from opposite genders seem to have different preferences in fashion consumption due to cultural and physical distinctions, in addition, clothing is a product for individual use. According to Blackwell et al. (2002), gender is a variable that can have a weighty influence on consumer choice.

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[4] All images are from www.freeimages.co.uk website.

In post-modern society, the proximity between genders due to social and professional changes, especially with adjustments in relation to the role of women in the 20th century and the emergence of 'new' men helping in domestic tasks, has highlighted the duality between equality and distinction.

Ethnicity

According to Solomon (1998), although the notion of people's racial and ethnic differences seems to be uncomfortable to consider, subcultural groups often share the same needs and desires.

Countries such as the UK and Brazil have a multi-ethnic society, in contrast to China, where 85% of the population are from one ethnic group.[5]

Religion

Beliefs and religions have a clear link with clothing. During diverse historical periods, churches, for example, suggested codes of dressing and adopted strict rules for adherence. Philosophical systems, sacred objects, rituals also influence fashion consumption.

Even in the 21st century, some religions have considerable influence over the way their followers dress. It seems useful to compare consumer attitudes towards religion.

Age

Consumer behaviour can vary substantially with age. Nostalgia is an important phenomenon that tends to be experienced by older people. The impact of nostalgia, as well as the desire for new challenges (mostly considered to be a characteristic of youth), can be measured and applied towards product development and promotional campaigns.

Undoubtedly, in their investigations, marketing professionals are much more interested in the young than in the older generations. The younger consumer searches for recognition within society and is engaged in identity construction (Solomon, 1998). The adoration of 'idols' and identification with celebrities has, for many, become an important process of becoming an adult, as well as helping in the interpretation of values within a group. In marketing, these conflicts are usually taken into account and appropriate language is used: autonomy *v.* dependence; rebellion *v.* obedience; idealism *v.* pragmatism; narcissism *v.* intimacy, etc.

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[5] National Statistics, China.

In the late twentieth century the youth market was seen as the most promising segment, but the ageing population in the developed countries urged a change in focus.

The younger generation have an immediate interest in and love of fashion, trends and fast consumer goods. The communication tools for this group also need to be innovative and technological.

The group around their thirties and forties spend more on their homes, cars and entertainment and the group around their forties and fifties spend more on food, clothing and pensions (Solomon, 1998).

The 'baby boom' generation[6], now in their sixties are known as the grey market, they behave differently from previous older generations; they love an active life, do not get satisfaction from traditional products and have much younger mind sets than their predecessors.

The older markets are seen as very diverse. The aged market is the emergent one according to demographic analysis. The advances in life quality, health and care (medicine) has increased life expectancy (Blackwell et al., 2002).

The main factors that can affect attitudes towards ageing are: autonomy, connections and relationships, altruism and personal growth. Other factors recently considered are health problems, lack of affection and financial difficulties.

Education

The educational level of an individual can lead or influence consumption. In many societies Education is considered a proxy variable of income, as not everybody can have access to high level learning. In countries where the education system is not equally developed for all citizens, the level of education certainly will carry weight in social class ranges (Blackwell et al., 2002). These variables, among others, turn social class into a very complex construct[7].

As a result of the controversy around how to measure and analyse social class, some researchers added the education variable to the equation. Social class can be defined as long-term and homogeneous divisions of society where individuals, families and groups share similar values, lifestyle, interests and behaviour that can be categorised.

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[6] Baby boom refers to the generation born imediatly after the II World War in United States and Europe.
[7] Construct is a denomination for a variable formed from a set of other variables, some of them with difficulties to be measured.

Income

The study of income level is important in consumer behaviour investigation. What should be measured is also a controversial subject due to household variation in terms of income: salaries, wages, welfare benefits, pensions and grants.

There is an intrinsic relationship between income level and social class, and normally consumers have different motivation depending on their purchase power. In addition, the advertising industry always promotes the possibility of social elevation and increased status through the consumption of special goods and services.

Income, in this research, is always measured in relative terms, being divided into high, medium and low levels, and subdivided in accordance with the interests of the study.

Body Mass Index

Considering the fact that garments are in immediate contact with the body of the consumer, the relationship between product and silhouette becomes evident. Wilson (1985), in her work *Adorned in Dreams*, commented on the increasingly widespread awareness of body fitness as an issue, particularly the cliché of 'the victory of the slim women against the fat women' (p.42). It is important to recognise that the slim ideal is only a Western society standard. Also, the motivation to get the perfect silhouette has, in recent decades, resulted in substantial growth within the cosmetic industry and food industry.[8]

The Body Mass Index (BMI) is a measure of body fat based on height and weight that applies to both adult men and women. It was adopted by the World Health Organization (WHO) as an international standard to measure obesity and malnutrition in demographic studies. The BMI is calculated by dividing your weight (in kg) by the square of your height (in meters).

It is important to stress that the Body Mass Index has no relation to aesthetic standards, and probably a healthy index would be too plump for the current fashion ideal. Very recently, the discussion of an ideal Body Mass Index was introduced into the fashion professional associations, due to the increase of anorexia amongst top models and fashion 'victim' consumers. Unfortunately, the death of a top model was the catalyst for the fashion industry waking up about its social responsibility. As a consequence, the initiative of an ethical code for catwalk shows and fashion campaigns is on going in Madrid, Milan, New York, Paris and Sao Paulo at current season collection launches.

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[8] Cosmetic industry here includes fitness and plastic surgery; food industry refers to healthy and light products.

104

Body Shape

Fashion, through aesthetic standards, puts pressure on consumers to adhere to an idealised stereotype based on a blend of blonde, tall and slim. Real consumers are very diverse and are therefore dissatisfied with this approach. A classification of different body figures was used as an innovative way to measure fashion clothing attributes in relation to consumption.

If ageing is included in the equation, a number of studies can be quoted, especially relating to the older generation of the early twenty-first century. The ageing 'baby boomers', as a new group of consumers, have already changed the attitudes towards ageing and challenged the traditional stereotype of older people. They want to be physically active as well as psychologically young.

Body biotypes vary both within and between ethnic groups but the latter shows far greater diversity. This research asked consumers for their clothing sizes for tops and bottoms, and combined it with height and weight to create four body shape categories for women and three categories for men.

Based on commercial sizing data collection and the work of Rasband (2002), the body shape of consumers was built. This approach of measuring fashion clothing consumption seems to be innovative and develops the capacity for dressing not only for the mind of the consumer, but also considering his/her body.

These two sections presented the variables collected within the consumer questionnaire application: the indicators and the consumer profile. Next section introduces the reader to the theories selected to be adapted and tested within this research.

3.2.3.3 Theories

Theories discussed in the Literature Review chapter (Chapter 2) were chosen for the consumer analyses. The decision was based on the appropriateness of the theory background in aiming to support the answers for the research questions. They are *Emotional Design*, *Human Needs*, *Motives for Dressing* and *Pleasure in Products* and are reviewed below.

Emotional Design

Norman's (2004) theory for emotional design is the one chosen for qualitative analysis. The author explained the emotional link with products using three parameters: Visceral, Behavioural and Reflective.

Human Needs

A decision was made about which theories from the Literature Review required further analysis. The Maslow Theory of Human Needs (1987) was chosen because it included basic needs through to complex ones.

The approach used was to transform the raw data collected from the consumers into the five categories of needs developed by Maslow (Physiological, Safety, Social, Esteem and Self-Actualisation). This exercise included a focal interpretation of human motivational behaviour towards fashion clothing consumption.

Motives for Dressing

Another area investigated relates to the motivation for dressing: Protection, Decoration and Modesty. As already discussed, the study of the psychology of clothes by Flügel (1930) can suggest the reasons for wearing fashion products.

The choice of this theory is relevant as it originally related to clothes, in contrast to other theories used in this research which came from a variety of fields and were adapted to the fashion clothing context.

Pleasure in Products

The last theory chosen was Jordan's Pleasures (2000) for product development, based on Tiger's (1992) work (Physio, Socio, Psycho and Ideo pleasures). This theory is relevant, especially for mature markets, and highlights the individuality of the consumer. Jordan's work (2000) also considered the sensorial and emotional aspects of the link between consumers and products.

It is important to highlight the emotional design and branding theories that can be applied to the fashion industry. There is evidence to suggest that the media phenomenon within fashion exerts a great influence on consumer choice, regardless of the consumer's own evaluation of the product.

After the definition of the variables, how and for what they were selected; it is appropriate to discuss the sample limitations. The next section presents the method adopted to calculate the probabilistic samples.

3.2.4 *The Consumer Samples*

As the entire population of consumers in the targeted countries could not be reached, a size sample was calculated to gather the data. In relation to the consumers' surveys, it was decided to adopt a random probabilistic methodology 'as every "unit" of the population has an equal chance of being selected for the sample' (Easterby-Smith et al., 2002, p.135).

The intention of using inferential statistical methods led to the following formula for infinite population (more than 100.000 individuals), considering an accuracy of 95.4% as the confidence level and a maximum standard error of 5%:

$$n = \frac{z^2 \cdot p \cdot q}{e^2} \tag{1}$$

where: $z = 2$ (likelihood to a confidence interval of 95.4%)

$e = 5\%$ (maximum error admitted)

$p = \%$ of the population targeted divided by 100 (in this case, over 15 years old

$q = \%$ of the population not targeted divide by 100 (in this case, under 15 years old

Based on census data gathered from the governments of the relevant countries, the size of the samples was calculated, as can be seen in Table 3.2:

Table 3.2 – Sample Calculation

Country	% population older than 15	% population younger than 15	calculus	minimum sample size expected	sample collected
UK	81	19	$\frac{(2)^2 \cdot (0.81) \cdot (0.19)}{(0.05)^2}$	247	264
BR	73	27	$\frac{(2)^2 \cdot (0.73) \cdot (0.27)}{(0.05)^2}$	316	320
CN	80	20	$\frac{(2)^2 \cdot (0.80) \cdot (0.20)}{(0.05)^2}$	256	227

Source: Census 2001, www.statistics.gov.uk; Censo Demográfico 2000, www.ibge.gov.br; National Bureau of Statistics of China – Census Data 2000, www.stats.gov.cn.

Although the data gathered in the research for the Chinese sample is lower than expected, the research is still valid due to the number of consumers involved. In this case, some consideration needs to be made in relation to the accuracy of the outcomes for the whole population.

A database framework was created for each of the country's surveys using SPSS software[9], first incorporating all of the raw data and finally adopting statistical treatments aimed at optimum use for the data collected from consumers and the elements based upon theories.

Considering that the consumer survey procedures are well established, it is time to move to the clarification of the second stakeholder proceedings: the designer survey. Next section presents the methods adopted to collect and analyse the data from these professionals.

3.3   DESIGNER SURVEY

Moving from the consumer to the designer survey, it is time to introduce the designer selection process, the data planned to be collected, and the methods of analysis. The next subsection presents the procedures for the interviews and for the analysis of the designer practices, based on selected theories from the Literature Review, Chapter 2.

3.3.1 The Sources for Designers

In order to build the designers' questionnaires, during the academic years of 2003-04 and 2004-05, some experience was developed with KIAD MA Fashion students as they are already working with professional designers or those with potential future success. Lectures were prepared and delivered to show the complexity of the fashion system as revealed through this research. The lectures aimed to discuss the importance of the consumer for the fashion creative process and its relationship with the market.

The core subject of one of the sessions was brand management. Some concepts and theories about management were explored to update the designers with the strategies from the decision makers.

Through questionnaires, an evaluation took place to ascertain the level of understanding of each subject treated in the lectures in order to map the major interests and difficulties for a new generation of fashion designer. These experiences assisted with the elaboration of the tools necessary to investigate designers as stakeholders of the fashion industry.

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[9] Statistical Package for Social Sciences

3.3.2 Tools for Designers

Considering the involvement and knowledge acquired within the MA Fashion lectures, it was decided that the best way to pose questions to designers would be by interviews. The interview is an appropriate method when the subject of enquiry needs an in-depth discussion.

Moreover, open questions are an efficient method for data collection in an exploratory study. After the experience with the MA Fashion students at the college, it was decided that the research should explore the entire product development process surrounding designer practices. The elements of investigation are detailed in the following subsections.

3.3.2.1   The Pilot Designer Questionnaire

Based on this analysis and after consideration of some other authors, a questionnaire was designed to be distributed to professional designers, focusing fully on the real fashion market in UK, Brazil and China.

In order to help with the process of primary data collection and avoid all-day interviews, the questionnaire was divided into three distinct sections. The first section related to designer practices in product development, the second measuring his/her attitudes towards the product and the last section enquiring about their thoughts in relation to the preferences of the targeted consumer.

Rehearsal interviews were held with six fashion designers who were exhibiting at the 'On|Off' event at London Fashion Week, in February 2005, in order to improve the format and check the clarity of the proposed questions. Afterwards, the final questionnaire was built.

3.3.2.2   The Final Designer Questionnaire

Some small changes were made to get the final version of the questionnaire, and a letter inviting designers to participate in the research was posted and emailed to different companies and studios. The invitation received replies from 40% of the designers. As a second resource, personal networks were put into action to help in reaching the desired number of interviewees.

The designers' interview script covered two areas: firstly open questions about their creative process and practices and secondly their tools, skills and strategies. In the second section there was a semantic differential scale of seven points towards bipolar concepts to measure designer attitudes towards *Artistic*, *Brand* and *Product* position.

As a comparative study aim, all the *Indicators for Fashion and Clothing Consumption* were presented to designers in order to map the degree of importance they think their consumers have for each of the elements embodied in clothing.

With the intention of investigating three different markets, the questionnaire was translated into Portuguese for targeting the Brazilian designers and English for the Chinese designers. For the interviews with Chinese designers, the interaction was conducted with the support of an interpreter.

Moving further, the subsequent task was to define what and how the questions should be better posed to the designers. Next section introduces the three approaches chosen to analyse the designers.

3.3.3 Approaches for Designers

In order to measure designers' practices and their relationship with the consumers and companies, some theoretical support was necessary. The questions posed to designers included environmental influences, business management and individual differences.

The first objective of investigation was the *Artistic* focus, aiming to give the designer the opportunity to express their subjectivity and measure the value this can add to the company package for a product. The second approach was related to the *Brand* and the identity of the company: to clarify and find a more effective relationship between companies and designers, practices and interests. The third subject analysed in the designers survey relates to the *Product*, attempting to measure the way consumers gain great benefits in their relationship with designers.

The following subsections present the explanation in detail regarding the three selected focuses. Furthermore, the reasons for the adoption of these approaches are also clarified.

3.3.3.1   Artistic Focus

In the Literature Review the artistic vein of a designer's work was observed (Mackrell, 2005; Papanek,1995; Taylor, 2005; Muller, 2000). Currently there is a tendency towards less distinction between art and commercial design, Although this was discussed in Chapter 2, a further understanding of fashion designers' attitudes should provide a better response for the outcomes for this research.

The *Artistic* focus is composed of the duality between: (i) Trends x Inspiration, derived from the Visceral and the Reflective dimensions of the Norman theory of Emotional Design (2004), discussed in Section 2.2.5.2; (ii) Large Scale x Exclusivity, selected from the Roger's model of Innovation Adoption (1983), presented in Section 2.2.1; (iii) Idea x Practicability, condensed from the Barnard work (2002) in which fashion has a main function of communication (Section 2.2.2) and (iv) Long Lasting x Disposal, adapted from the Kaiser's concepts of Fads and Classics (Section 2.2.1). The bipolar concepts used to this analysis are show in Table 3.3 below:

Table 3.3 – Design Key Concepts for Artistic Focus Analysis

BIPOLAR CONCEPTS			Explanation
Trends	v.	Inspiration	A fashion designer can be pressurised by trend forecasting inside a market context. The aim is to measure how inspirational ideas are preserved in the designer's everyday practice.
Large Scale	v.	Exclusivity	If the company strategy is related to low cost, the designer should consider bigger bulk production. If the company strategy is more differential or artistically led, exclusivity is an essential element to be considered in the product development process.
Idea	v.	Practicability	The innovative level of product development sometimes can surpass any real functionality of the object. Like 'art for art's sake', the suggestion is 'product for product's sake' measurement.
Long Lasting	v.	Disposal	Fashion naturally embodies disposability with updated and out of date trends and products. Fashion companies pursue a high level of substitute products at new launch collections. A designer as an artist probably prefers permanent artefacts. Nowadays products out of season are renamed as 'vintage'.

This focus of analysis, although very important for professionals from the creative field, is not enough to shape a designer. Considering this, two more foci were studied and are noted in the subsequent sections.

3.3.3.2   *Brand Focus*

Another side of designer practice interfaces with branding theories. Some fashion designer names become brands even though the person responsible for the collection is no longer the creator of the concepts. There are, however, some powerful brands that guide designer practices.

All these aspects should be investigated more deeply and are part of the designer study within the scope of this research. The *Brand* direction is measured by the antagonism between: (i) Local x Global, as a mention to the macro environment analysis PESTEL discussed at Section 2.2.7.1; (ii) Market-driven x Consumer-driven, brought up from the supply and demand sides as management directions (Section 2.2.8.1); (iii) Social Responsibility x Business Performance, corresponding to esteem and exchange values, respectively, as a summary of the value analysis held by Csillag (1995) in Section 2.2.8.3 and (iv) Luxury x Diffusion, as part of the discussion of the Cooper and Press's works (1995), whereas design has art and marketing ingredients (Section 2.2.6). The bipolar concepts used in this section analysis are shown in Table 3.4 below:

Table 3.4 – Design Key Concepts for Brand Focus Analysis

BIPOLAR CONCEPTS			Explanation
Local	v.	Global	In order to measure the attitude of the designers within their surrounding environment, the geographic scope of their preferred actions was requested. Brand identity and socio-ethnical roots were brought into this analysis.
Market-driven (Supply side)	v.	Consumer-driven (Demand side)	This subject is very subtle, but essential to this research. The aim is to learn if the designer attitude is targeted to a specific consumer as an individual or towards a group of consumers with some similarities.
Social Responsibility	v.	Business Performance	A very sensitive question arose here based on the designer's attitude to his/her social responsibility as a professional, aiming at a rise in consumer quality of life or prioritising business profits even though the product on offer is not, in the essence, ideal for that consumer.
Luxury	v.	Diffusion	This analysis relates to the studio/atelier/artistic led company or to the industrial/serial/mainstream mass produced environment and product impact.

In addition to the two foci already discussed, one more was established to support the investigation of designer's practices. The next subsection presents the elements that build in the concept.

3.3.3.3 *Product Focus*

The last of the three analyses for fashion designers proposed by this research relates to the product itself. The aim is to measure real awareness of the material product from the designer's point of view.

The issue includes conceptual, raw material and production development. Finally, the *Product* approach is formed by the following paradoxical concepts: (i) Price x Quality, as a way to investigate buying and consumption, two of the main stages of the Blackwell et al. model (2002) mentioned in Section 2.2.3; (ii) Body x Mind, considering two of the Maslow needs (1987), respectively physiological and self-actualisation (Section 2.2.3.1); (iii) Techno x Handmade, as a way to analyse Rufin's definition (1991) for technology and knowledge and intensive labour and natural resources as strategies for the production of goods, presented at Section 2.3.3 and (iv) Psycho x Physical, checking two of the pleasures conceived by Tiger/Jordan (1992/2000) as discussed in Section 2.2.5.1. The bipolar concepts used in this sections analysis are presented in Table 3.5.

Table 3.5 – Design Key Concepts for Product Focus Analysis

BIPOLAR CONCEPTS		Explanation
Price v.	Quality	Depending on the business strategy, some designers are forced to reduce high quality standards due to price targets. The question here addresses the designer's attitude towards these dilemmas.
Body v.	Mind	Is the product conceived targeting the body or the mind of the consumer? The approach is related with the "part of the consumer" that the designer visualizes as having priority.
Techno v.	Handmade	The analysis at this point is about production attitudes and beliefs. The markets offer possibilities from the nanotechnology (more suitable for design engineering) to organic intensive crafted labour (more interesting for craft makers).
Psycho v.	Physical	The subject of analysis in this section is the meaning of the product in relation to the consumer: from individuality and socio-cultural messages to functionality and comfort attributes.

Following the sequence planned for exploratory research, some key information about the respondents should be gathered and considered. The next section introduces the variables used to map the profile of the designer samples.

3.3.3.4   *Designer Profiles*

In order to allow for better accuracy, the profile of the designers was mapped based on information gathered during the interviews. Personal and professional information for the designer was requested such as educational background, position inside the company and years of experience in the industry. Data related to market segment and environment, size of production, average price and nature of the business were also asked.

Once the data required to make the designer analyses possible had been established, several decisions were taken in relation to the way the designers were contacted. This information is introduced in the next section.

3.3.4 *The Designer Samples*

As the interviews with designers took place around one year later than the consumer primary data collection, a ratio between them should be established. In reality, it is difficult to infer the proportion of designers in relation to consumers. Based on a feasible target number, it was decided that at least six were required in the UK market, seven in Brazil and five in the Chinese market. The personal network of the researcher, combined with the special interest in designer practices in different regions within Brazil, resulted in an increase of two interviewees making a total of nine.

Fashion designers were invited to participate in the research based on their interest, diversity of work and availability. An official letter from the University College was sent to them, explaining the research and the importance of their contribution. Within each national sample, it was seen as important to include well-known fashion designers, brand-diffusion fashion designers and emerging new generation fashion designers. Designers were classified by educational background, market segment, market environment and years of experience.

Both qualitative and quantitative descriptive analysis (presented later in this chapter, sections 4.2.2 and 4.3.2, respectively) were used as methods of inquiry to investigate the designers' educational background and skills as well as their company's position, target groups and anticipated developments.

A total of twenty interviews took place: June and July 2005 in the UK, from July to September 2005 in Brazil and in November 2005 in China. For the Chinese survey, the researcher conducted all interviews with interpreter support.

Qualitative research, based on content analysis, was carried out with the open question responses. A database, with the original quantitative data collected from designers, was created using SPSS. Statistical descriptive analysis was used to support and to contextualise designers' responses.

The discussion of the data gathered and the subsequent analysis will be presented in Chapter 4. Before that, the decisions relating to the last of the stakeholders to be targeted by this research, are presented in the next section: the company survey.

3.4 COMPANY SURVEY

A similar presentation framework to that used with consumers and designers was applied to companies as well. Several theories relating to companies revealed and discussed in the Literature Review (Chapter 2) were applied in this section. Moreover, this section presents the sources, tools, approaches and data collection methods for the company investigation.

3.4.1 Sources for Companies

As one of the members of the triumvirate proposed by this research, fashion companies were invited to participate in the research based on their interest, diversity of their work, and availability.

It was seen as important to include well-known fashion companies, brand-diffusion fashion companies and emerging fashion companies in each country sample. Size, market strategy, strategic group and product value parameters were used to classify companies. When it was possible, the CEO was the interviewee, although in some cases the interview was carried out with a middle manager.

The initial approach with the managers was broad and multidisciplinary as wide as possible to guarantee different viewpoints and actions within the industry.

3.4.2 Tools for Companies

The same methodology adopted for the designers' data collection was used for companies. A structured interview was set up concerned with the strategies and practices of the companies. As the desired person to be interviewed was the top manager, the questions were built with regard to the whole environment of each company. The assumption was that all the departments of a fashion company would have some information to contribute to this research.

Although during an interview several issues can arise depending on the interviewee, a structured questionnaire was elaborated in order to guide the meetings. The procedures to build this instrument also guaranteed the consistency of the data gathered, this is presented in the subsequent section.

3.4.2.1   *The Pilot Company Questionnaire*

The first draft of the company questionnaire was designed based on management and marketing theories. At this point, a clear comparison with the consumer and designer questionnaires was made in order to ensure the point of comparison and to include the issues covered by the other target groups.

The questionnaire was tested with three product development managers with wide experience of the whole fashion clothing value chain. The discussion was held after a Federation of Clothing Designers & Executives (FCDE) meeting in 26 January 2005 at London College of Fashion, London. To ensure clarity and accuracy, some questions were revised, others added and an evaluation of the order of the questions took place.

3.4.2.2   *The Final Company Questionnaire*

The final company interview script was composed of two parts: open questions about the company structure and practices - tools, strategies and leadership; product market position; and a semantic differential scale question of seven points towards bipolar concepts to measure companies' attitudes for *Market*, *Strategy* and *Value* position.

As a comparative study aim, the same procedure carried out for designers was repeated for the companies: all of the *Indicators for Fashion and Clothing Consumption* were presented to managers in order to map the degree of importance they think their consumers give to each of the elements embodied in fashion clothing products.

Qualitative research, based on content analysis, was carried out with the open question responses. A database framework was created using SPSS software and some data was transferred to Excel software in order to facilitate the graphic data presentation. All the data profile, analysis and discussion are presented in Chapter 4.

3.4.3 *Approaches for Companies*

In order to measure company practices and their relationship with consumers and designers, some theoretical support was necessary. The questions posed to managers included an external and internal analysis and considered some well-known theories such as *The Five Competitive Forces*, *The Seven Ps*, *PESTEL Analysis* and *The Competitive Advantage Dimensions*.

The first object of investigation was the *Market*, aiming to find a better link between company business needs and consumer needs. The second aspect considered was business *Strategy*, giving the company an opportunity to review its objective and find greater sustainability. The last area relates to *Value*, and although it can be an issue for branding, the intention here was to encourage design activity as a stronger generator of value. Each of these three focuses are better described in the next subsections.

3.4.3.1   Market Focus

The aim of this section was to map company market strategy and consumer profile based on the products they offer to the market. The Literature Review presented in Chapter 2 gives support to the analysis.

The investigation of the *Market* focus was based on the keywords posed as bipolar position: (i) Promotion x Fidelity, considering the differences between the act of attracting new consumers or investing in the consumers the company already have, as an allusion of vertical marketing and lateral marketing practices (Section 2.2.7.4); (ii) Sales-driven x Consumer-driven, measuring the direction of the company management, from demand or from supplier (Section 2.2.8.2); (iii) Techno x Handmade, in an attempt to find out a trend between companies in relation to the work of Rufin (1991) mentioned in Section 2.3.3; and (iv) Word of Mouth x Billboards, with the intention to investigate the preferences in promotion, from personal sellers to advertising (Section 2.2.7.3). The bipolar concepts investigated are explained below (Table 3.6):

Table 3.6 – Company Key Concepts for Market Focus Analysis

BIPOLAR CONCEPTS			Explanation
Promotion	v.	Fidelity	The measurement here is related to the link between companies and consumers. If the company promotes products in order to attract new consumers, its strategy is more growth-led, if the company's actions aim to maintain its consumers by loyal relationship, the strategy should be more inclusive-led.
Sales-driven (Supplier driven)	v.	Consumer-driven (Demand driven)	Whether quantitative sales figures or qualitative focus research take precedence in the decision-making processes on the board is sensitive.
Techno	v.	Hand-made	The intention of this item is to map the kind of products the companies are offering: from the high tech concepts to the traditional and folk.
Word of Mouth	v.	Billboards	The promotion processes ensure good penetration into new markets. Different techniques are used worldwide. Dialectically, the investment in people and their personal network to spread a new product launch is compared to an advertising campaign displayed in key points around the town.

Although the *Market* position of a fashion company can tell substantially about a company's practices, two more focuses were planned to be investigated in this research. Next sections present the other two focuses: *Strategy* and *Value*.

3.4.3.2   Strategy Focus

Company strategy varies depending on the balance of competitive forces. The way a company acts in their external and internal environment can enhance leadership in the market place.

The second focus, the *Strategy* chosen by the company, was analysed based on the opposition of the following keywords: (i) Consumer x Market, in order to evaluate the way the companies identify and respond to consumer needs, corroborating with the work of Cooper and Press (1995) discussed in Section 2.2.7; (ii) Local and Global, as an investigation of the macro environment as elements of the PESTEL analysis (Section 2.2.7.1); (iii) Product x Production, in order to rank the company proximity to an specific strategic group (Hill and Jones, 2004) from proprietary to generic goods explained in Section 2.2.8.4); (iv) Social Responsibility x Business Performance, measuring the value chain, from exchange value to esteem value (Csillag, 1995; Section 2.2.8.3); and (v) Profitability x Commitment, in an attempt to point the proximity the companies have with their communities, if the approach is into process or inter sector as commented in Section 2.2.9.3 while discussing Cluster analysis. Hence, managers were asked about the following bipolar concepts shown in Table 3.7:

Table 3.7 – Company Key Concepts for Strategy Focus Analysis

BIPOLAR CONCEPTS			Explanation
Consumer	v.	Market	This point attempts to measure the degree of specification the company has in relation to its targeted market and if the level to be considered is individual or groups.
Local	v.	Global	The question here is related to its position in the market and the ideology embodied in the company's mission.
Product	v.	Production	The measurement at this point is related to the way the company faces the dichotomy between an elaborated/sophisticated product and an efficient manufacturing production.
Social Responsibility	v.	Business Performance	The role of a company in the development of a better society is something to be considered in long-term strategies and sustainability. Profit and quick returns are companies' preferred strategy in a short-term plan.
Profitability	v.	Commitment	Fast-fashion and conspicuous consumption are strategies to give more returns to companies than to consumers. The company statements and attitude towards controversial issues tend to demonstrate its awareness of the consumer point of view.

After the elucidation of the *Market* and *Strategy* foci, next section presents the concept used to research the *Value* focus within the third stakeholder survey, in order to complete the investigation of the companies.

3.4.3.3   *Value Focus*

The value chain is crucial to a company's existence and performance. Added value can be driven by superior design, ideology or product position.

The bipolar concepts presented to managers that can support a better product development process are presented in Table 3.8, below. The *Value* focus was composed of the following keywords: (i) Price x Quality, as an adaptation of two stages from Blackwell et al.'s decision model (2002), discussed in Section 2.2.3; (ii) Large Scale x Exclusivity, considering the Roger's model (1983) of innovation adoption explained in Section 2.2.1; (iii) Fair Trade x Low Cost, in reference to the work of Abernathy et al. (1999) and the global shifts, discussed at Section 2.2.9.1; and (iv) Long Lasting x Disposal, in consonance with the opposite concepts of fads and classics from the work of Kaiser (1985) explained in Section 2.2.1.

Table 3.8 – Company Key Concepts for Value Focus Analysis

BIPOLAR CONCEPTS		Explanation
Price *v.* Quality		A similar question presented to designers was posed to managers, although with a different interpretation: their attitudes towards pricing or quality strategy?
Large Scale *v.* Exclusivity		This item relates to the manager's decision on offering value for consumers through 'you need to be part of the in crowd' or 'this is specially designed to fit you'.
Fair Trade *v.* Low Cost		Particularly in the fashion industry because of its need for intensive labour, some initiatives for transferring production to peripheral countries are quite sensitive. Although some companies make efforts to ensure their suppliers' commitment to better worker conditions, the level of evaluation, awareness and acceptance varies greatly.
Long Lasting *v.* Disposal		The longevity of the product offered is something that can add value to a product. Here the managers indicate their attitudes towards the life cycle of their products.

The following task of decision-making was in relation to the company information needed to be collected. The aim was to attempt to have a diversity of company profiles within the survey. The next subsection mentions the data gathered that supports the delineation of the samples.

3.4.3.4   *Company Profiles*

Some information about the company's history was asked with the intention of supporting better clarification of their actions and choices. The age, source of production, size of production, average price, and number of employees were relevant data for collection and subsequent parameters for investigation.

Taking into account that the data collection methods are already defined, the decision was then to move on to the way the companies' managers should be contacted. This information is introduced in the next section.

3.4.4 *The Company Samples*

The number of companies was established in a manner which corresponded to the designers sample size. A survey of 20 fashion companies was held in the UK, Brazil and China based on interviews. Six interviews were completed in the UK in June and July 2005, nine in Brazil during July to September 2005 and five in China in November 2005. The researcher conducted all interviews with translation support for the Chinese sample.

Companies were invited to contribute to this research by an official letter from the University College explaining the purpose of the study and the benefits that the industry could receive. The main criteria for the selection of the companies was that they should have some sort of product development department in-house.

The data gathered was stored into qualitative and quantitative data files. Content analysis was carried out on the open question responses. Statistical descriptive analysis was used to analyse the managers' responses and support the conduction of a blended methods of analysis.

The discussion of the information gathered as well as the subsequent analysis results will be presented in Chapter 4. It is now appropriate to move on to the discussion of the methods of analysis adopted in this research. The next thee sections present respectively the procedures related to the data analysis of the three stakeholders. While the conduct chosen is presented, the nature of the methods is also discussed.

3.5   ANALYSIS OF CONSUMER DATA

As mentioned before, the raw data was gathered; the selected variables needed classification, reclassification and adjustment before the analysis began.

This research used three methods of analysis: qualitative analysis, quantitative analysis and the quali-quantitative analysis. The data suitable for the qualitative analysis was classified and categorised. The data for quantitative analysis usage needed to be classified into independent and dependent variables, where the latter expected to vary because of the former. Within the quali-quantitative analysis, both ways were necessary to guarantee better interpretation of the data.

Considering that each of these methods requires specific data treatments, the next subsections present a detailed explanation of the procedures.

3.5.1 Qualitative Analysis for Consumers

It is useful to note that all information analysed within the consumer scope came from the questionnaires, and it is important to stress that the form carried two open questions. These two questions allowed the consumer to answer questions about their favourite piece of clothing and also write down something that they had not found in the previous questions. These questions have been analysed as qualitative data.

In research like this, it is not expected that all respondents will answer open questions. The rate of open questions answered within this research varied according to nationality, as following: British sample 78%, Brazilian sample 89% and Chinese sample 63%.

Moreover, the consumer answers were classified, numbered and interpreted according to the purposes of distinct stages of the planned research. The following subsections explain specifically the procedures carried out at each stage.

3.5.1.1 Content Analysis – New Indicators

Some of the comments made by the British consumers in the open questions allied with research observation on the nature of consumption in Europe, guided the addition of new *Indicators for Fashion and Clothing Consumption* to the original work conducted by the researcher in 1999.

Initially, during the observation and previous test phase, three indicators were added (Same Gender, Opposite Gender and Exclusivity). Subsequently, seven more were included: Beliefs, Celebrity Influence, Ideology, Image Judgement, Mood, Racial Roots and Seasonality.

These additional ten indicators, although not tested as the 28 original indicators from Rocha (1999), were presented in the questionnaires and used with the same level of importance and treatment during all phases of this work. Despite these new ten indicators being generated from qualitative methods of analysis, the main application they were used for related to the quantitative methods of this research.

The following sections introduce two other perspectives within this research, in which qualitative methods and content analysis was used.

3.5.1.2 Content Analysis – Emotional Design

In order to investigate how Norman's theory (2004) could be applied to fashion products, a qualitative investigation took place based on the favourite item of clothing stated by the consumers.

The content analysis of some consumers' comments about their favourite piece of clothing were linked to Norman's theoretical framework for emotional design and also explained within cultural components.

Furthermore, the analysis of the consumers' comments led to a specific investigation related to the favouritism in fashion clothing consumption, where the methods used are explained in the sequence.

3.5.1.3 Content Analysis – Favourite Piece

The concept of favourite is related to a preference above all others and means something regarded with special favour or liking.

As a complex construct, it can be explained, by identity, comfort, emotion, usability, tangible and intangible factors, and so on. The choice of a favourite piece of clothing is something to be seriously considered as an example of emotionality and usability, as it has been already tested, bought (not always) and worn by the consumer.

The consumer comments were firstly classified by nationality, then numbered and lastly selected based on the appropriateness. The selected comments were linked with the *Indicators for Fashion and Clothing Consumption* and a comparison between national target consumer groups took place. At this point, the attempt was to find likeness and distinction between consumers.

Considering the insights from the qualitative analyses, the research then moved to the quantitative methods. The detailed procedures used at this stage are presented in the following section.

3.5.2 *Quantitative Analysis for Consumers*

Investigative research considering consumer preferences is an effective approach for fashion designers in order to build a model to identify those needs. Quantitative and statistical analyses helped to define the consumer profile in terms of social status, economics, values, gender, age, physical aspects, origin and education clusters.

All data was analysed using descriptive frequency analysis and when necessary, the ranges were re-organised aiming for at least 10% in each category inside every variable.

After the classification of variables into independent and dependent categories, the task was to choose which way these independent and dependent variables could be crossed using statistical methods on a SPSS database. The aim at this point was to find out significant relationships that could explain consumer behaviour towards fashion clothing products.

3.5.2.1 *The Independent Variables*

The independent variables are the ones used to explain a dependent variable. In other words, these are the profiles of consumers who are trying to explain their fashion clothing consumption.

As explained before, the variables that characterize the consumers' profiles were acquired and classified into categories in order to help the quantitative analysis.

Moreover, in order to facilitate the methodology, the independent variables were classified into three distinct categories: socio-cultural, socio-economic and socio-physical (Figure 3.2).

socio-cultural   socio-economic   socio-physical
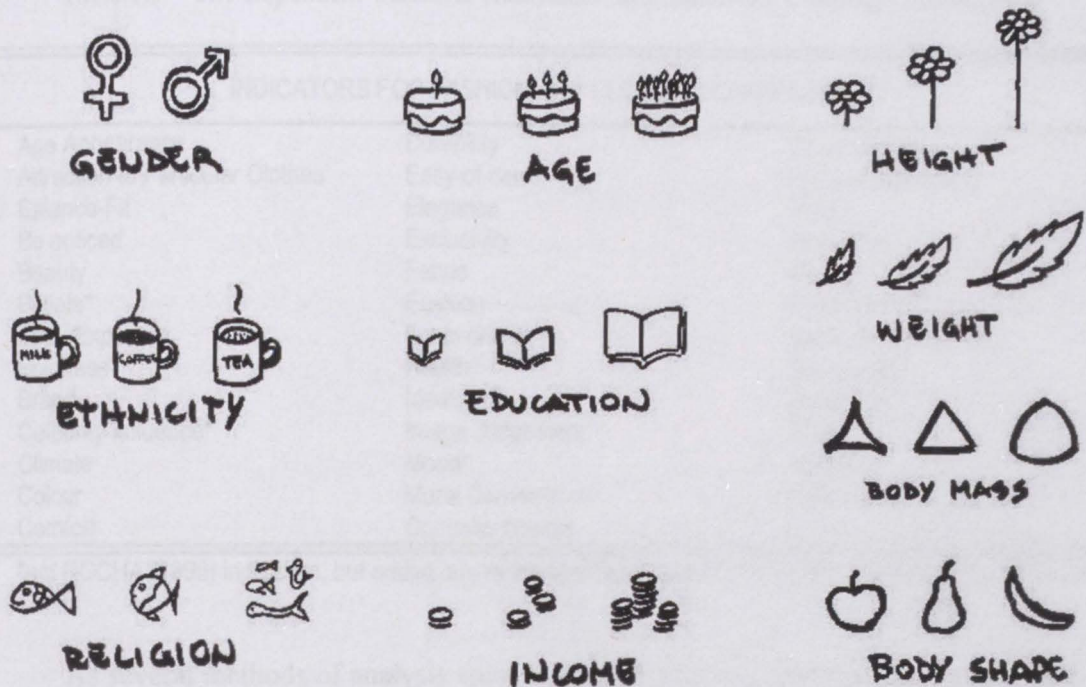
Figure 3.2 – The Independent Variables

Socio-cultural variables of *Gender*, *Ethnicity* and *Religion* were then all classified as nominal variables as their ranges do not follow any numerical hierarchy. The same procedure occurred with the socio-physical independent variable *Body Shape*.

Socio-economic variables of *Age*, *Education* and *Income* and socio-physical variables of *Height*, *Weight* and *Body Mass* were classified as numeric ones, as their values obey a numerical order. All numerical variables were then organised in ascending value order to facilitate the cross relationship procedures.

3.5.2.2   *The Dependent Variables*

The dependent variables are the ones expected to vary in accordance with the independent ones. These variables are the ones considered as the core of the research and for that reason are treated in differently.

The *Indicators for Fashion and Clothing Consumption* were considered as the dependent variables in this research. Table 3.9 lists all:

Table 3.9 – The Dependent Variables (Indicators for Fashion and Clothing Consumption)

INDICATORS FOR FASHION AND CLOTHING CONSUMPTION		
Age Appearance	Durability	Personal Style
Attraction to Particular Clothes	Easy-of-care	Physical Adequacy
Balance-Fit	Elegance	Price
Be noticed	Exclusivity	Profession
Beauty	Fabric	Quality
Beliefs*	Fashion	Racial Roots*
Body Exposure	Functionality	Same Gender
Boldness	Health	Seasonality*
Brand	Ideology*	Sensuality
Celebrity Influence*	Image Judgement*	Taste
Climate	Mood*	Versatility
Colour	Moral Conventions	Welfare
Comfort	Opposite Gender	

*not ROCHA (1999) indicators, but added due to the qualitative analysis held within the Csmr-UK-2004 survey.

As several methods of analysis were adopted during the quantitative analysis phase, the Indicators were classified into different approaches, explained in the following paragraphs.

The procedures have in common the adoption of the analyses which first happened within each of the consumer national groups, and after, in a comparative analysis of the preferences within British, Brazilian and Chinese consumers.

RECOGNITION OF NEED

The first classification of the *Indicators for Fashion and Clothing Consumption* was based on the Blackwell et al. (2002) categories of *Need Recognition: Environmental Influences, Psychological Processes* and *Individual Differences*.

The subsequent attempt was to find a connection between each of the *Indicators for Fashion and Clothing Consumption* individually, and the consumer variables, using the means of the consumers' databases as the figure was to be analysed. The procedures for the cross tabs phase are presented in Section 3.5.2.4 subsequently.

Furthermore, the Indicators were combined in order to offer a reduction in the number of variables to be analysed in each section. To make this reduction possible, inferential statistics methods, factor analysis, was used to blend the Indicators into Needs, Motives and Pleasures. The subsequent paragraphs explain the use of the selected theories mentioned, while Section 3.5.2.3 introduces the procedures adopted to run the factor analysis.

NEEDS

In an attempt to clarify the understanding of consumer expectations in relation to fashion clothing products, Maslow's Human Needs theory was used as a method of analysis.

The factor analysis was used with the intention of reducing the quantity of variables in use and to consider an interpretation of human needs. The starting point was the 38 *Indicators for Fashion and Clothing Consumption* that were classified and combined to relate to the five original Maslow's needs: *Physiological, Safety, Social, Esteem* and *Self-Actualisation* (Table 3.10).

Table 3.10 – The Dependent Variables (Maslow's Needs)

MASLOW'S NEEDS				
Physiological	Safety	Social	Esteem	Self-Actualisation

Following the clearer results for the *Needs*, cross tabs were run with the consumer variables in order to find out the significant relationships. The analyses were first carried out with each national database and afterwards compared with the three national consumer groups.

MOTIVES

The second theory tested using quantitative analysis was Flügel's motivation for clothing which is based on the explanation of three general motives for the development of garments within human society: *Protection, Decoration* and *Modesty*.

Again, factor analysis was used with the intention of reducing the quantity of variables in use and to consider an interpretation of the motivation to be dressed. The starting point was the 38 *Indicators for Fashion and Clothing Consumption* that were classified and combined to form Flügel's three original *Motives*: Protection, Decoration and Modesty (Table 3.11).

Table 3.11 – The Dependent Variables (Flügel's Motives)

FLÜGEL'S MOTIVES		
Protection	Decoration	Modesty

Using the same sequence of procedures adopted for the *Needs*, after the blending of the Indicators into the *Motives*, the analyses was carried out with the Independent variables in order to find expressive relationships.

PLEASURES

The theory of Four Pleasures (Tiger, 1992; Jordan, 2000) considers not only the utilitarian needs but also the hedonistic benefits. The first step of this stage was to map the *Indicators for Fashion and Clothing Consumption* in colligation with the *Four Pleasures* theory.

As presented before (Chapter 2) Tiger's work is comprised of the *Physio, Socio, Psycho* and *Ideo* pleasures (Table 3.12). It is important to stress that the concept in this research, as opposed to Jordan's work, was to form the *Pleasures,* based not on specific products, but with a consideration of the consumer's *Indicators for Fashion and Clothing Consumption.*

Table 3.12 – The Dependent Variables (Tiger/Jordan's Pleasures)

JORDAN'S PLEASURES			
Physio	Socio	Psycho	Ideo

The analyses took place individually for each national consumer database, followed by a comparative analysis of the consumers by nationality. The attempt to test out theories already known in the field of science was valuable and complex in procedure.

The next sections present the inferential statistical methods adopted by this research with the correspondent constraints, as well as the statistical tests applied with the independent and dependent variables.

3.5.2.3   *Inferential Statistical Methods*

Considering the necessity of the reduction of variables and the adequation of the *Indicators for Fashion and Clothing Consumption* into the selected theories, factor analysis was chosen as the appropriate method to reduce them. The method adopted was the Varimax Orthogonal Rotation (Hair et al., 1998) and the better solution is obtained by iteration where just one factor is expected to remain.

The Barlett Test of Sphericity was adopted to verify the hypothesis that the correlation matrix was the identity matrix. The lower the level of significance, the better it is for the data analysis. In other words, if the population correlation matrix is an identity matrix each variable correlates perfectly with itself (r = 1) but has no correlation with the other variables (r = 0) (Johnson and Wichern, 2002).

The Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy is an index used to examine the appropriateness of factor analysis. The KMO test was used to test sample adequacy where high values (between 0.5 and 1.0) indicate that the factor analysis is appropriate.

Cronbach's alpha test was used to ensure the reliability of the reductions and quality of the results. According to Churchill (1979), a Cronbach's alpha between 0.50 and 0.60 is adequate.

All the dependent variables (the *Indicators for Fashion and Clothing Consumption*) were generated by Likert scales. Even after the reduction of dependent variables, using factor analysis, the new generated variables (factors) were still ordinal. Some adjustment was necessary to allow comparison within the same group.

Moreover, the tests to check significant relationships vary according to the nature of the variables. The next section details the procedures adopted for this stage of the research.

3.5.2.4 *Cross Tab Relationship Procedures*

All dependent variables used in this research (*Indicators, Needs, Motives* and *Pleasures*) were presented as ordinals, as the adapted Likert scale was used to classify consumer opinions.

When both independent and dependent variables were ordinal ones, the Gamma coefficient was calculated. When independent variables were nominal ones, the Mann-Whitney test and the Kruskal-Wallis test were used, depending on the number of categories the variable had. The Mann-Whitney test was used to cross ordinal dependent with independent nominal variables with two categories. The Kruskal-Wallis test was used when the nominal variable had more than two categories (Table 3.13). For all statistical analysis the significance of any correlation considered was P<=0.05.

Table 3.13 – Statistical Tests Adopted by the Nature of the Variables

		INDEPENDENT VARIABLES	
Name of the Variable	Gender	Religion Ethnicity Body Shape	Age Education Income Height Weight Body Mass
Nature of the Variable	Nominal with two categories	Nominal over two categories	Ordinal
Statistics Used	Mann-Whitney test	Kruskal-Wallis test	Gamma coefficient

As a consequence of the quantitative analyses, where some of the questions of this research were not yet answered, a later stage of analysis was established: the quali-quantitative methods. The blending of the methods was adopted in order to get the best resources from each of the approaches, assisting the research in getting closer to a realistic mode of investigation. In practice, both methods are used to establish insights for decision-making processes.

The next section presents the scope of the quali-quantitative method chosen to be applied in this research: the Means-End Chain Model.

3.5.3 Quali-quantitative Analysis for Consumers

The use of the Means-End Chain Model, a marketing management tool to assist professionals with the understanding of consumer behaviour, was composed of two distinct stages and linked with two distinct methods of analysis: the hierarchical map, and a comparative study of the *Indicators for Fashion and Clothing Consumption* from the point of view of consumers from the three countries.

While the hierarchical map construction is mainly a qualitative method, the comparison within consumers' preferences involves quantitative analysis.

The hierarchical cognitive map built, uses the content of the consumers answers to investigate the order of priority and prevalence of elements related to products. Within this research, the elements studied were the *Indicators for Fashion and Clothing Consumption* that were classified into *Attributes*, *Consequences* and *Values* (ACV), according to Gutman's work (1982).

The second stage of the Means-End Chain analysis was comprised of the reduction of the Indicators within the three dimensions of the model. To make this possible, the same procedures adopted to *Needs*, *Motives* and *Pleasures* were used with statistical factor analysis.

As a subsequent phase, the ACV dimensions (*Attributes*, *Consequences* and *Values*) were crossed with the consumer variables in an attempt to find out significant relationships. The same procedures conducted with the previous analyses of this nature were adopted at this stage of the research.

Before moving to the next section, where the methods used with the designer and company analyses are detailed, Figure 3.3 shows a summary of the research methods and theories used to analyse the data from the consumer samples. The compilation of this set of analyses was an appropriate exercise for the development of a new model to enhance the fashion industry activities.
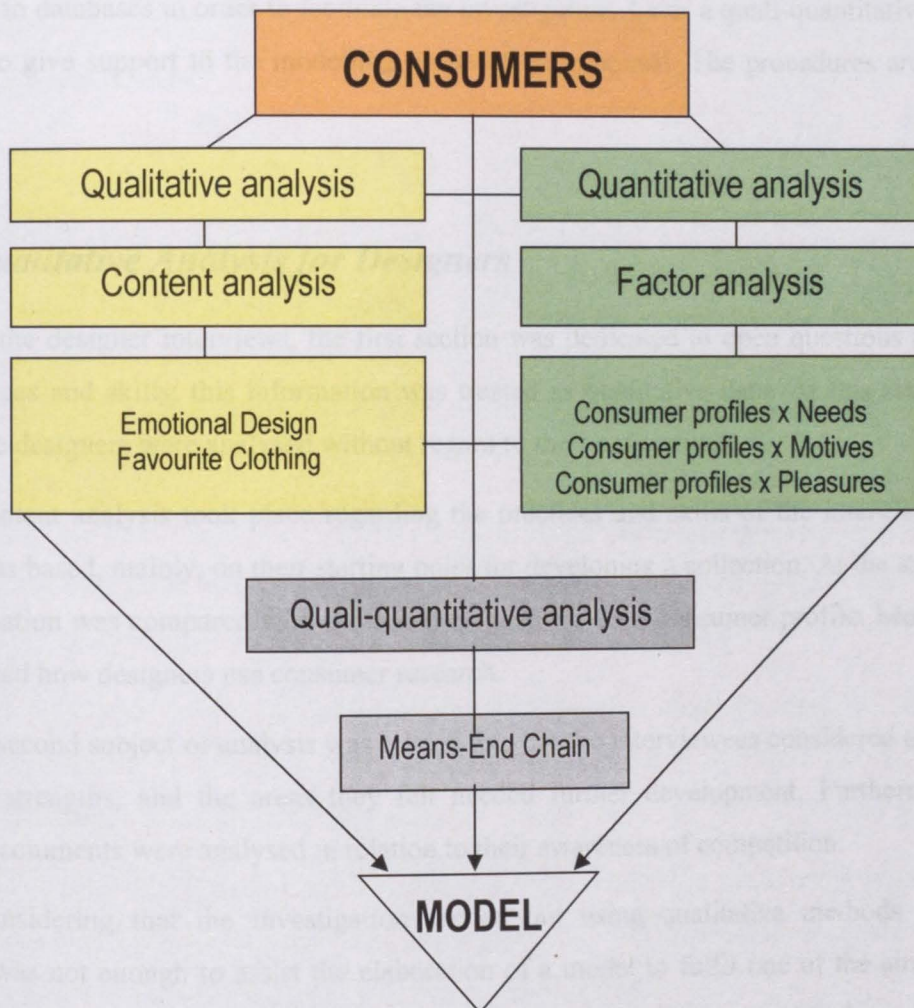
Figure 3.3 – Research Methods for Consumers

The construction of the model was based on the methods already used in the previous stages of the research, with an extensive comparative analysis with the nationalities and stakeholders.

In order to aid full understanding the proposed model construction, the methods of analysis carried out with the designers and companies databases needs to be detailed. The following two sections present respectively, the methods adopted to investigate the designer and company influence within the product development processes in the fashion clothing industry.

3.6   ANALYSIS OF DESIGNER DATA

This section explains the way in which the analysis of the designers' data was conducted. The qualitative and quantitative data gathered from the interviews were treated and transferred to databases in order to facilitate the investigation. Later a quali-quantitative method was used to give support to the modelling phase of the proposal. The procedures are detailed below.

3.6.1 *Qualitative Analysis for Designers*

In the designer interviews, the first section was dedicated to open questions related to their practices and skills; this information was treated as qualitative data. At this stage of the analysis the designers were analysed without regard to their nationality.

Content analysis took place regarding the practices and skills of the interviewee. The analysis was based, mainly, on their starting point for developing a collection. At the same time, this information was compared with the one they gave for their consumer profile. Moreover, it was observed how designers use consumer research.

A second subject of analysis was related to what the interviewees considered to be their skills and strengths, and the areas they felt needed further development. Furthermore, the designers' comments were analysed in relation to their awareness of competition.

Considering that the investigation carried out using qualitative methods with the designers was not enough to assist the elaboration of a model to fulfil one of the aims of this research, additional methods of analysis were used. The next section presents the quantitative methods adopted, followed by the section where the quali-quantitative methods used within the design sample is detailed.

3.6.2 *Quantitative Data for Designers*

The designers' quantitative data analysis was carried out with the use of data collected using a semantic differential scale. According to Churchill (1999), the original semantic differential scale consists of a great many bipolar adjectives employed to investigate people's reactions to the objects of interest. This method was chosen to generate a score of the dimensions most used by the designers in relation to their practices and attitudes towards product development.

The analysis relates to their practices, considering a focus on *Artistic, Product* and *Brand* led. The data was treated individually and as a mean of the category. Afterwards, activity was analysed by nationality, suggesting distinct attitudes among designers' practices depending on their country. The results should provide insights for the construction of an interface between designers, consumers and companies.

3.6.3 *Quali-quantitative Analysis for Designers*

Basically, the designers' quantitative data analysis was descriptively related to the *Indicators for Fashion and Clothing Consumption* they considered to be of greater importance for their consumers. The approach considered what designers believe their consumers are most looking for.

Firstly the data was collected using a Likert-type scale that measured the degree of importance that designers, based on the expectation of their consumers, gave to the *Indicators for Fashion Clothing Consumption*.

The *Indicators for Fashion and Clothing Consumption*, from the point of view of the designers from the three countries, were classified and analysed. A blend with quantitative analysis supported the stakeholders' comparison.

Lately, the ACV Means-End Chain Model (Gutman, 1982), comprising of *Attributes, Consequences* and *Values*, was used for the analysis. At this stage, the comparison within nationalities of the designers took place as a parameter of analysis.

The different outcomes from the distinct methods of analysis within the designer survey gave support to the design of a model that should be suitable for adoption as a strategic tool for product development.

In order to clarify the methods and approaches, Figure 3.4 below, illustrates the procedures followed with the designer databases.

DESIGNERS

Qualitative analysis | Quantitative analysis

Content Analysis | Descriptive analysis

Starting point
Practices
Skills

Artistic focus
Brand focus
Product Focus

Quali-quantitative analysis

Means-End Chain
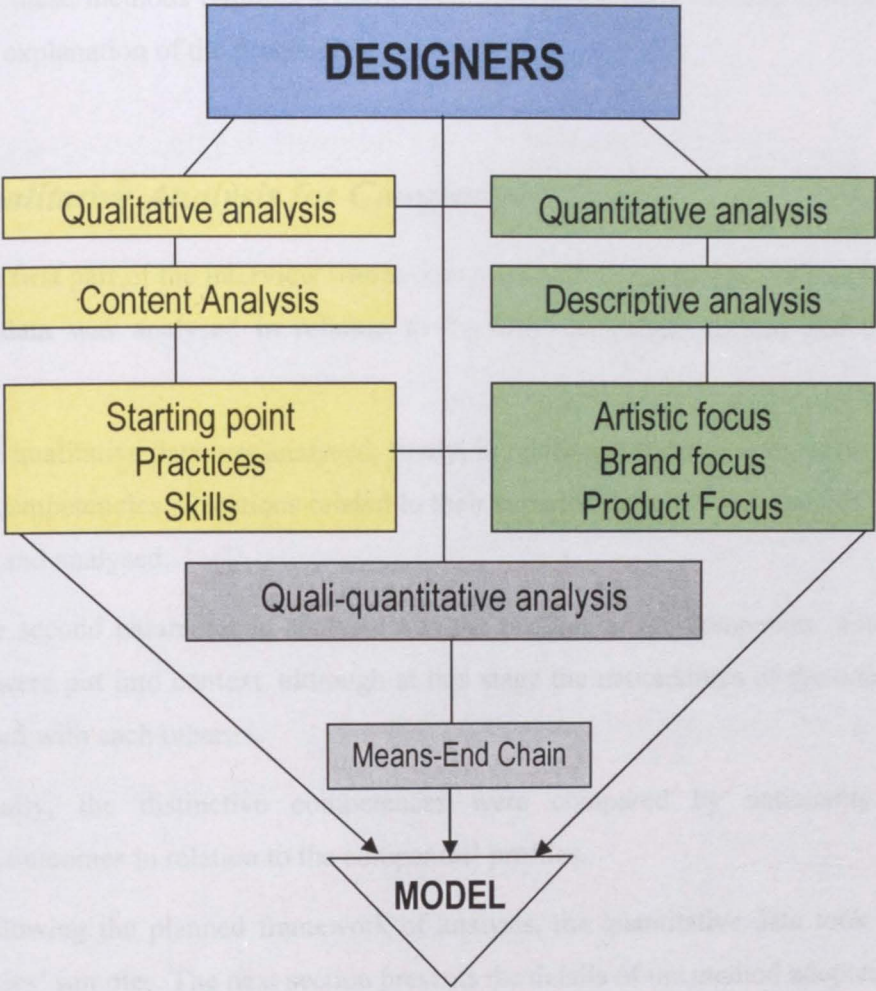
MODEL

Figure 3.4 – Research Methods for Designers

Noting that the model also requires analyses derived from the company survey, next section presents the methods carried out to generate these outcomes. Firstly the qualitative methods are explained, followed by the quantitative analysis. The last subsection details the quali-quantitative procedures adopted for use with the companies' databases.

3.7 ANALYSIS OF COMPANY DATA

The interviews held with the managers generated raw data comprising of two different types: comments from open questions and quantitative data related to the measurement of the companies' practices and preferences. Hence, the selected variables needed classification, reclassification and adjustment before the analysis began.

This investigation with companies, as a consequence, adopted three methods of analysis: qualitative analysis, quantitative analysis and quali-quantitative analysis. Considering that each of these methods requires specific data treatments, the following subsections present the detailed explanation of the procedures.

3.7.1 *Qualitative Analysis for Companies*

The first part of the interview was investigated with the support of content analysis. The qualitative data was analysed in relation to the way companies treated and attracted new consumers.

The qualitative data was analysed, firstly, in relation to the way companies manage their distinctive competencies. Questions related to their superior strengths and areas of improvement were asked and analysed.

The second parameter in analysis was the profiles of the companies' consumers. The comments were put into context, although at this stage the nationalities of the companies were not compared with each other.

Finally, the distinctive competences were compared by nationality, generating meaningful outcomes in relation to the companies' profiles.

Following the planned framework of analysis, the quantitative data took place within the companies' samples. The next section presents the details of the method adopted for analysis and discussion.

3.7.2 *Quantitative Analysis for Companies*

The quantitative analysis carried out with the company survey had a similar framework to that adopted for the design survey. The semantic differential scale was used to collect managers' attitudes in relation to bipolar concepts.

Managers were asked about 13 bipolar concepts analysed into three distinct foci: *Market*, *Strategy* and *Value*. The data is treated individually and as a group, where means and tendencies were discussed.

At this stage of the analysis, firstly the companies were analysed without nationality as a parameter, and later a comparative analysis by nationality took place giving key insights into the way the companies should be considered within the proposed model.

As a complementary analysis, a quali-quantitative investigation was carried out using the *Indicators for Fashion and Clothing Consumption*. The next section presents the detailed procedures adopted.

3.7.3 *Quali-quantitative Analysis for Companies*

This section presents the quali-quantitative analyses of the *Indicators for Fashion and Clothing Consumption* carried out, firstly comparing the companies by nationality and later using the Means-End Chain model to compare companies and consumers.

As the companies were asked to mark on a five point Likert scale, the degree of importance they gave to their products, an analysis using the means was carried out. The *Indicators for Fashion and Clothing Consumption* were, consequently, classified according to the ACV Means-End Chain model (*Attributes*, *Consequences* and *Values*), making the comparison between the managers from British, Brazilian and Chinese companies precise.

The outcomes from the distinct methods of analysis carried out with the companies were considered as a set of indicators for the developing model, Figure 3.5 below presents the methods used to analyse company data.
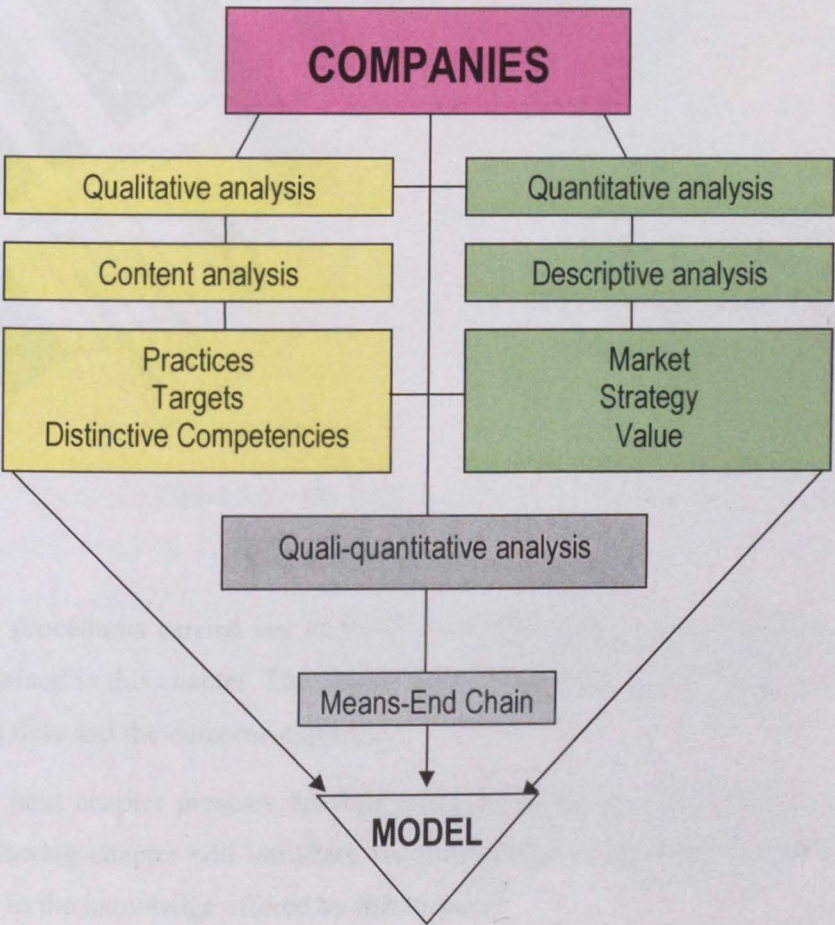
Figure 3.5 – Research Methods for Companies

135

One of the main objectives of this research is that data from the consumer, designer and company surveys were brought together. The outcomes from the three stakeholders were hence compared and blended, promoting the construction of an interface model (Figure 3.6).
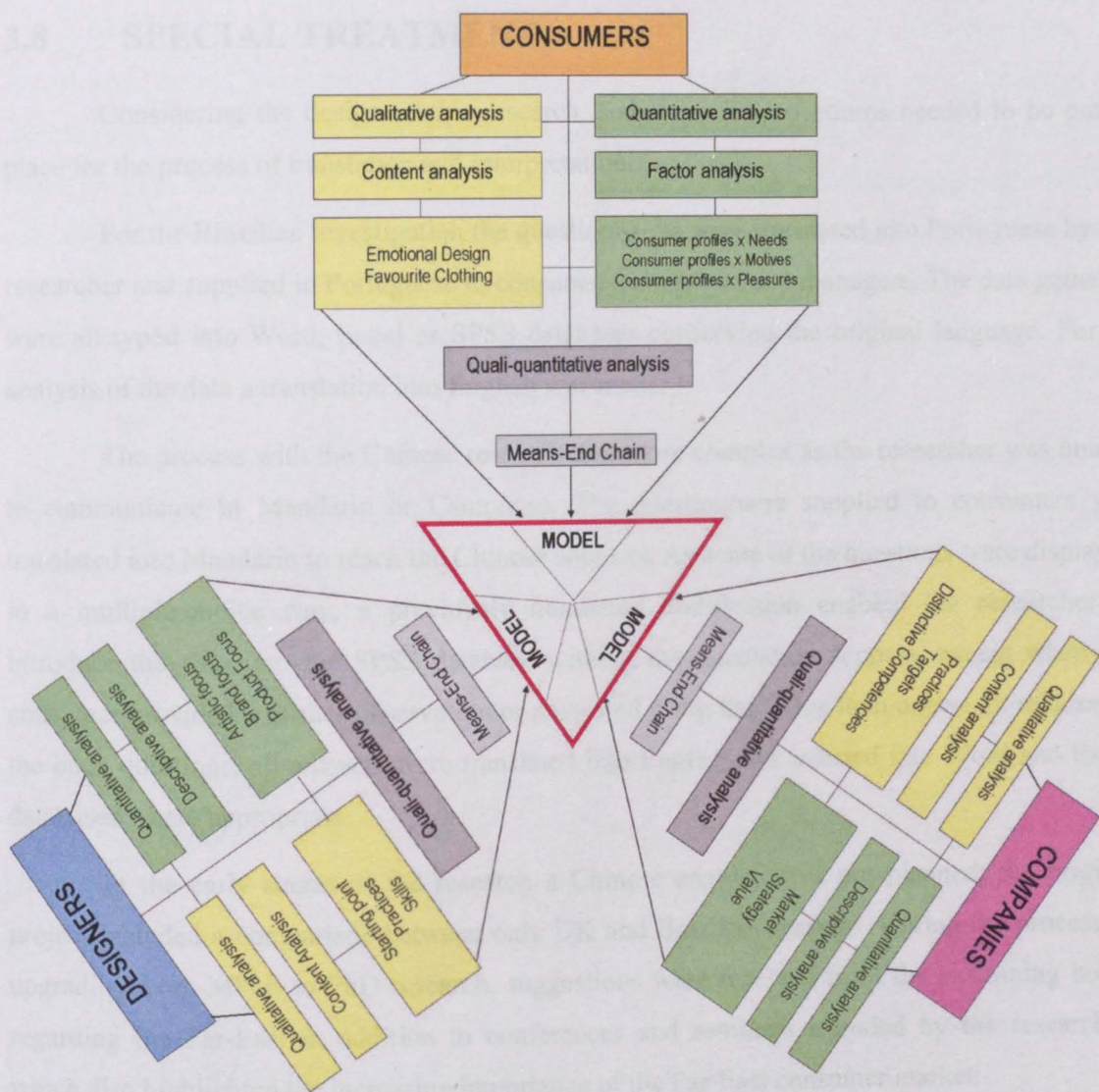
Figure 3.6 – The Interface of Methods and Surveys

The procedures carried out to build the model were all an extension of the methods already explained in this chapter. The decision to use each tool, test or analysis was based on the nature of the data and the outcome expected.

The next chapter presents the data analysis, comparisons, procedures and discussion, then the following chapter will introduce the construction of the model as well as detailed the contribution to the knowledge offered by this research.

However, before moving to the following chapters, some consideration about the design of this research is discussed. This information relates to data treatment, translation, software, and ethics, and is presented in the next section.

3.8 SPECIAL TREATMENT

Considering the design of this research, some special procedures needed to be put in place for the process of translation and interpretation.

For the Brazilian investigation the questionnaires were translated into Portuguese by the researcher and supplied in Portuguese to consumers, designers and managers. The data gathered were all typed into Word, Excel or SPSS databases conserving the original language. For an analysis of the data a translation into English was made.

The process with the Chinese research was more complex as the researcher was unable to communicate in Mandarin or Cantonese. The questionnaire supplied to consumers was translated into Mandarin to reach the Chinese subjects. As some of the questions were displayed in a multiple-choice way, a previously numbered codification enabled the researcher to introduce the data into the SPSS database without the translation support, except when the consumer provided a further observation or answered using the *Other* item option. In relation to the open questions, all answers were translated into English and inserted into Word and Excel databases where appropriate.

In the early stages of the research a Chinese analysis was not planned; the original project included a comparison between only UK and Brazilian markets. During the process of upgrading from MPhil to PhD research, suggestions were received from the examining board regarding the Far-East in addition to conferences and seminars attended by the researcher, which also highlighted the increasing importance of the Far-East consumer market.

A recognition of the influence of China in global exchanges within fashion and textile chains, coupled with an interest in the cultural differences in behaviour and business management, stimulated some reshaping of the research process. In order to offer a more global outcome by including a Chinese investigation, the design of the research was adjusted to take into account the time limitations.

3.9 EVALUATION

Data collection is always a complex and sometimes a difficult procedure. Although all the stages from the questionnaire design, survey calculation and reliability and validity of the data and process were carried out, some difficulties appeared due to the dynamic nature of society and other external factors.

As a principle adopted by this research, all consumers over 15 years old from UK, Brazil and China were potential interviewees. This assumption made the gathering and comparison of the relevant data much more complex. Although diversity was expected, the characteristics of different national education systems, social classification and units of measurement meant much more work than had been predicted. This was especially true when dealing with body size as the units of measurements depended not only on nationality but also on the age group of the respondent (Imperial System, International Standard System and Chinese System).

Another point which is useful to stress is the fact that the consumers were not measured. All the information was supplied by them and considered as true. Although 'body scan' equipment is already available in some research centres and companies, the limitations in using these sources are still numerous. It would be necessary to transport the samples to the laboratory or offer a mobile laboratory to get the body data. In addition, the software normally considers the body measurement as a static activity, although the dynamic anthropometric could be an appropriate way to gather data for clothing application.

As some scientific methods of gathering anthropometric data are in current development and the classification system is under discussion, the measurements of consumers were based on standard commercial sizes available in local markets.

3.10 COMPUTER PROGRAMS USED

The use of software can help the storage, analysis and presentation of data with the research process. Three key software packages were used as supportive tools during this research.

Word processing was used to register all stages of the research: questionnaire frameworks and qualitative data collection and analysis.

Excel software was used to classify qualitative data into different categories and to generate quantitative simple statistic procedures and graphics. In the early stage of the research Excel was used to generate a Literature Review database, replaced by Reference Manager software in the later stages.

SPSS was exhaustively applied in inferential and complex statistical procedures and graphics within the quantitative section of the research.

3.11   ETHICAL ISSUES

This research considered the Code of Practice of the institution[10] in relation to ethical subjects, especially towards data gathered from primary sources.

The anonymity of all respondents was ensured in the introduction of each questionnaire. Due to the personal nature of the data obtained, the commitment to its use for academic purposes only was clearly stated.

As no financial return was given to any respondent, it was established with designers and companies that they will receive the final version of this work as soon as possible. It was agreed with designers and companies that they could be quoted in the acknowledgement section on the prelude to this thesis, although in the analysis section all the information given has not been source recognised in order to preserve confidentiality.

It is important to declare that there were no potential risks to participants of this research, and all proper measures to obtain consent from the interviewees were undertaken before the start of data collection.

3.12   SUMMARY

Briefly, the research methods adopted by this research are a complex mixture of qualitative and quantitative analysis. The data gathered came from three different targets within the fashion industry: consumers, designers and companies, and the information on each group received distinct data treatment. The data were gathered by using questionnaires with consumers and interviews with designers and companies.

In addition, the data collection took place in three different markets: UK, Brazil and China, using translation and interpretation when necessary. Treatment of the data collected was necessary to ensure the validity and reliability of the research.

The questionnaire for consumers incorporated two sections: the first one considered consumer thoughts about clothing and fashion (Indicators for consumption), and the second one personal information such as their social (Gender, Ethnicity, Religion, Education, Age and Income) and physical (garment size, Height and Weight) profiles.

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[10] Initially was Kent Institute of Art & Design, after a merger with the Surrey Institute of Art & Design on 1st August 2005 the current institution is University College for the Creative Arts.

The 31 *Indicators for Fashion and Clothing Consumption* found in the qualitative research guided the construction of the statements. Some qualitative data arose from the UK-2004 database and as a result further seven indicators were added to the Brazilian and Chinese questionnaires. This decision to extend the number of indicators was made to adapt the analysis, originally made from a national perspective (Rocha, 1999), into one with a global perspective.

It was decided to use a value scale with four options to classify consumers' answers (Totally Agree, Partially Agree, Partially Disagree, Totally Disagree) when measuring the *Indicators for Fashion and Clothing Consumption*. A database framework was created using SPSS software.

Interviews with the designers and companies were divided into two blocks: open questions about their practices and their tools, skills and strategies, followed by a semantic differential scale measuring the focus; *Artistic, Brand* and *Product* for designers and *Market, Strategy* and *Value* for companies. Later, the *Indicators for Fashion and Clothing Consumption* were presented to designers and managers in order to map the degree of importance they think their consumers gave to their products.

Database frameworks were created using SPSS software that incorporated two different sections: the original data collected from consumers, designers and managers and varies in-built elements based on the previously discussed theories. Qualitative, quantitative and quali-quantitative analyses were used to construct the outcomes of the research. These outcomes are presented in the next chapter, accompanied by discussion about potential further research.

CHAPTER 4 – DATA ANALYSIS AND DISCUSSION

This chapter presents and discusses the primary and secondary data collected as part of the research. The first section of this chapter (4.1) introduces a descriptive analysis of the data obtained from the consumer survey, the second section (4.2) gives a descriptive analysis of the data gathered from the designer survey and the third section (4.3) a similar analysis from the company survey. The qualitative data analysis is presented and discussed in section (4.4) where consumer data is introduced; section (4.5) discusses designer data and section 4.6 discusses company data. The quantitative analysis of the data, in particular the inferential statistical findings are shown in section 4.7 for consumers, section 4.8 for designers and section 4.9 for companies. The last sections of the chapter relate to quali-quantitative methods used to investigate the data gathered; consumers are discussed in (4.10), designers in (4.11) and companies in (4.12). Finally, the chapter conclusion in section (4.13) briefly summarizes the highlights of the findings in a comparative format.

4.1 DISCUSSION OF CONSUMER SURVEY FINDINGS

This section is comprised of four subsections that relate to the different national targets this research investigates: British consumers (4.1.1); Brazilian consumers (4.1.2); Chinese consumers (4.1.3) and Consumer comparison (4.1.4). The descriptive statistics presented are, where possible, compared with the population of the target nations.

The consumer surveys were conducted in the UK, Brazil and China, asking interviewees about the degree of importance they attribute to fashion clothing products. The British sample (Csmr-UK-2004) took place in May and June 2004 and comprised of 264 consumers from London and the Southeast of England, 320 questionnaires were completed essentially in the Northeast of Brazil (Csmr-BR-2004) during August and September 2004, and 227 Chinese consumers (Csmr-CN-2004) took part in this research during November and December 2004.

Several descriptive statistics, due to space constraints, are shown by valid percentage only. Three distinct types of social variables were addressed and analysed: socio-cultural variables – *Gender*, *Ethnicity* and *Religion*; socio-economic variables – *Age, Income* and *Education*; and socio-physical variables – *Height, Weight, Body Mass* and *Body Shape*.

Socio-Cultural Variables

GENDER: *Gender* is an important indicator of change within the fashion market, primarily due to the emerging interest in fashion by male consumers. Culturally, during the last three centuries, fashion has been a subject where there has been a greater emphasis upon the needs of women. Some researchers (Breward, 1999; Bakewell et al., 2006) have indicated that in the 21st Century fashion has increased in importance for men. Gender is also an important consideration as it could indicate new market opportunities in womenswear or menswear, and fashion products designed by *Gender* do have different requirements.

ETHNICITY: This variable can help to understand consumer subgroups based on their origin and racial identity. *Ethnicity* focuses more upon the connection to a perceived shared past and culture. Due to the pluralism of modern societies, two discreet movements can be seen: acculturation and segregation[18].

RELIGION: Although the power of *Religion* is fading away in modern, Western societies and to some extent has been desacralised, religious symbology still has links with some dress codes. In many Eastern societies, religion is still at the heart of everyday life, although in China its role has been restricted by political factors.

Socio-Economic Variables

AGE: *Age groups* have been used as consumer variables, consumers appear not to make choices according to their *Age*, instead appearing to buy fashion products according to their lifestyles.

EDUCATION: The degree of literacy and level of *Education* can distinguish consumers, especially within a global society where language and cultural skills become crucial to understanding messages.

INCOME: Economic classes can usually indicate which products are bought according to wealth, *Income* and purchasing power. The credit card seems to have promoted a significant change in ability for consumers to both borrow and manage their money.

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[18] Acculturation is the process of learning the beliefs and behaviours endorsed by another culture. Segregation is the policy or practice of separating people of different races, classes, or ethnic groups, as in schools, housing, and public or commercial facilities, especially as a form of discrimination (Solomon, 1998).

Socio-Physical Variables

HEIGHT: *Height* is a key parameter in calculating the *Body Mass Index* (BMI), it is also a good variable to study due to the prevalence of the tall model, which is currently considered as fashionable.

WEIGHT: Many consumers have an everyday concern with their *Weight*, this variable is crucial for the *Body Mass Index* construction. In a fashion world concerned with a very slim silhouette, the *Weight* variable is useful for gaining insights in to self-esteem issues with regards to being under or over weight.

BODY MASS: The *Body Mass Index* is the ratio between the *Weight* and the square of the *Height* of individuals. The *Body Mass Index* has a range of 5 points, established by the World Health Organization: Underweight (below 18.5); Normal (between 18.5 and 24.9); Overweight (between 25.0 to 29.9); Pre-Obese (between 30.0 to 39.9) and Obese (above 40). Although *Body Mass* should be considered an important consumer variable for fashion designers, as the sensory nature of clothing is crucial to the way humans relate to fabrics and comfort, these classifications adopted are more related to health than to visual aesthetics.

BODY SHAPE: The variety of consumer body profiles is substantial, some efforts have been made to find a classification to describe physical differences between consumers. The adopted standard for this research was *Body Shape*s identified by Rasband (2002) due to the feasibility of calculation without complex measurements. The four distinct biotypes for women are 'A'; 'V'; 'O' and 'X' and the three biotypes for men are 'A', 'V' and 'O'.

The next section presents the data results for the British survey, followed by the sections that present the Brazilian and Chinese data results. Analysis was based on the independent social variables, classified in: Socio-Cultural Variables – *Gender*, *Ethnicity* and *Religion*; Socio-Economic Variables – *Age*, *Income* and *Education*; and Socio-Physical Variables – *Height*, *Weight*, *Body Mass* and *Body Shape*.

4.1.1 *British Consumers*

A survey was conducted with 264 consumers in the UK in 2004. All the data shown has been organised into ranges to maintain at least 10% of frequency in each category. This principle was, on occasion, not followed due to the low frequency of a given category. The consumer survey in the UK had the following profile:

143

Socio-Cultural Variables:

GENDER: The British sample was composed of 264 consumers, 64% of them women and 36% men (Table 4.1). According to UK National Statistics (2003) the population of the country has a more equal balance between genders than the results shown in the survey (Figure 4.1). Although the data used does not correspond in precise proportion to reality, the treatment of the data, allied with the choice of statistical testing and software used, prevents biased results.

Table 4.1 – Gender Frequency Distribution within the British Consumer Survey

Csmr-**UK**-2004		Frequency	Valid Percent
Gender			
Valid	Female	169	64.0
	Male	95	36.0
	Total	264	100.0
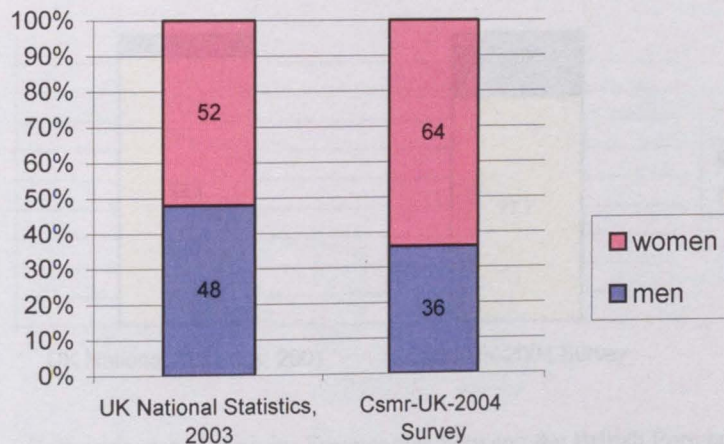
Figure 4.1 – Comparison of Gender Frequencies between the British Population and the Csmr-UK-2004 Survey [19]

ETHNICITY: The majority of consumers declared themselves as White (77.6%) and 22.3% of the survey were from other ethnic origins (1.2% African, 0.4% Bangladeshi, 0.8% Caribbean, 7.6% Chinese, 1.2% Indian, 1.2% Pakistani, 6.2% Other Asian and 3.8% others) as seen in Table 4.2. In relation to the data from the UK National Statistics (2003), the sample gathered for this research has a higher proportion of non-whites.

[19] UK National Statistics 2003 data available divided Gender ranges by over 16 years old and not over 14 years old as the target of this research.

Table 4.2 – Ethnicity Frequency Distribution within the British Consumer Survey

Csmr-**UK**-2004			
Ethnicity		Frequency	Valid Percent
Valid	African	3	1.2
	Bangladeshi	1	.4
	Caribbean	2	.8
	Chinese	20	7.6
	Indian	3	1.2
	Pakistani	3	1.2
	White	202	77.6
	Other Asian	16	6.2
	Other	10	3.8
	Total	260	100.0
Missing	Not Answered	4	
Total		264	
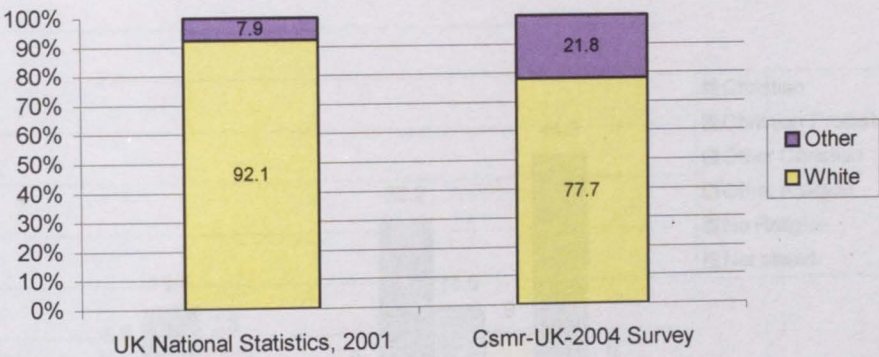
Figure 4.2 – Comparison of Ethnicity Frequencies between the British Population and the Csmr-UK-2004 Survey

RELIGION: 32.2% of consumers declared themselves as Christian Protestants, followed by 14.5% of Other Christian followers (9% Orthodox and 5.5% Roman Catholic) and 9.0% of consumers were from Other Religions (2.0% Buddhist, 0.8% Hindu, 0.8% Jewish, 2.7% Muslim, 0.4% Sikh and 2.3% others), as seen in Table 4.3, below. In addition, 44.2% of the respondents declared No Religion, showing a greater difference in proportional frequency between the Census data and the sample related to No Religion consumers (Figure 4.3).

Table 4.3 – Religion Frequency Distribution within the British Consumer Survey

Csmr-**UK**-2004			
Religion		Frequency	Valid Percent
Valid	Buddhist	5	2.0
	Christian Orthodox	23	9.0
	Christian Protestant	82	32.2
	Christian Roman Catholic	14	5.5
	Hindu	2	.8
	Jewish	2	.8
	Muslim	7	2.7
	Sikh	1	.4
	No religion	113	44.2
	Other	6	2.4
	Total	255	100.0
Missing	Not Answered	9	
Total		264	
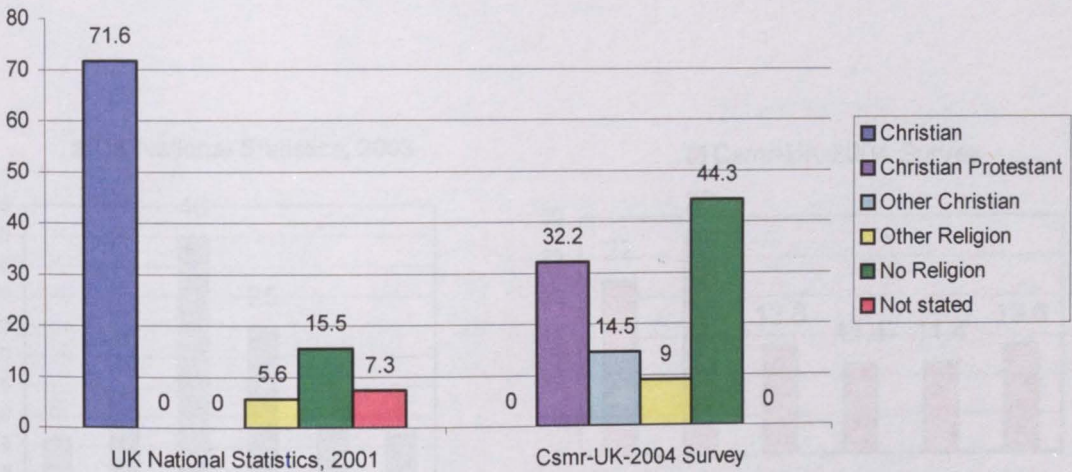
Figure 4.3 – Comparison of Religion Frequencies between the British Population and the Csmr-UK-2004 Survey

Socio-Economical Variables:

AGE: The age ranges inside the sample, as shown in Table 4.4, were 22.0% 15-19 year old consumers, 28.0% of 20-24 year olds, 13.6% of 25-29 year olds, 11.4% in the 30-39 range, 11.4% between 40-49 years old and 13.7% of 50 year olds and over (8.7% between 50-59 and 4.9% 60 and over). The Census data shows the British population as being older in profile than the statistics gathered (Figure 4.4).

Table 4.4 – Age Frequency Distribution within the British Consumer Survey

Csmr-UK-2004			
Age Range		Frequency	Valid Percent
Valid	15-19 Years old	58	22.0
	20-24 Years old	74	28.0
	25-29 Years old	36	13.7
	30-34 Years old	11	4.2
	35-39 Years old	19	7.2
	40-44 Years old	18	6.8
	45-49 Years old	12	4.5
	50-54 Years old	15	5.7
	55-59 Years old	8	3.0
	60-64 Years old	3	1.1
	65 Years old or more	10	3.8
	Total	264	100.0

Figure 4.4 – Comparison of Age Frequencies between the British Population and the Csmr-UK-2004 Survey[20]

EDUCATION: The education range (Table 4.5) of the survey comprised of: 5.9% of consumers left school without any exams or had GCSEs (Grade D-E); 20.5% of consumers fitted within the 1-4GCSEs (Grade A-C) to NVQ Level2 or Intermediate GNVQ; 28.4% were from 2+ A Levels to High National Diploma; 27.6% of interviewees had a First Degree and 17.7% of the survey had a Postgraduate Qualification. The sample presented a level of education higher than the Census data, especially in relation to the post-graduate level, as shown in Figure 4.5 below.

[20] UK National Statistics 2003 data available divided Age ranges by over 16 years old and not over 14 years old as the target of this research.

147

Table 4.5 – Education Frequency Distribution within the British Consumer Survey

Csmr-**UK**-2004

Education		Frequency	Valid Percent
Valid	Left School without Taking any Exams	10	3.9
	GCSEs (Grade D - E)	5	2.0
	1 - 4 GCSEs (Grade A - C)	10	3.9
	5 or more GCSEs (Grade A - C)	30	11.8
	5 or more O Levels or Grade 1 CSEs/School Certificate	10	3.9
	NVQ Level 2, Intermediate GNVQ	2	.8
	2+ A Levels, 4+ AS Levels, Higher School Certificate	49	19.4
	NVQ Level 3, OND, Advanced GNVQ	11	4.3
	NVQ Level 4-5, HNC, HND	12	4.7
	First Degree (e.g. BA, BSc)	70	27.6
	Postgraduate Qualification (e.g. MA, PhD, PGCE)	45	17.7
	Total	254	100.0
Missing	Not Answered	10	
Total		264	

UK National Statistics, 2003 ▪ **Csmr-UK-2004 Survey**
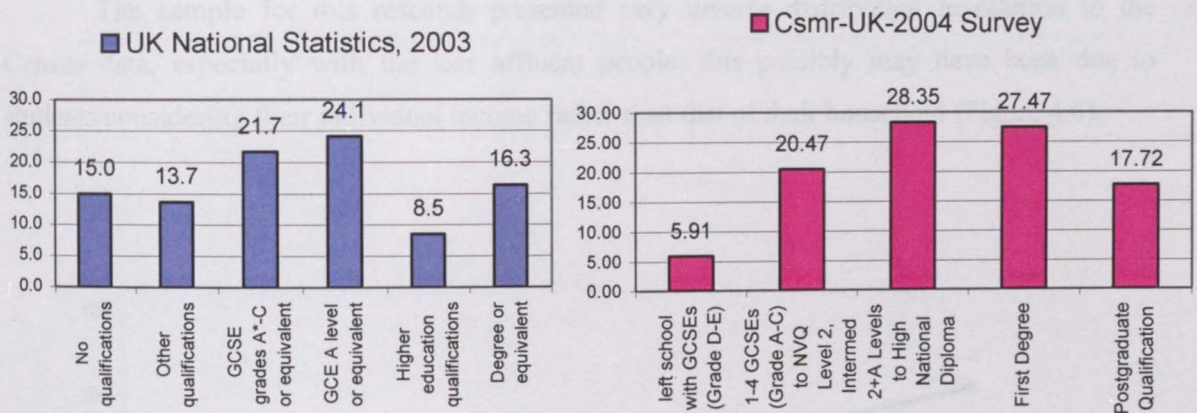
Figure 4.5 – Comparison of Education Frequencies between the British Population and the Csmr-UK-2004 Survey[21]

INCOME: The survey showed: 13.7% of consumers having an annual income of up to £4,999; 16.4% receiving between £5,000 to £14,999; 24.3% having a household income from £15,000 to £24,999; 11.9% receiving £25,000 to £34,999; 13.7% having an income from £35,000 to £44,999 and 19.9% of the consumers receiving a household income from £45,000 or more (Table 4.6).

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[21] UK National Statistics 2003 data available for Males aged 16 to 64 and Females aged 16 to 59.

Table 4.6 – Income Frequency Distribution within the British Consumer Survey

Csmr-**UK**-2004			
Income		Frequency	Valid Percent
Valid	Up to £5,000 (£96 per week)	31	13.7
	£5,000-£9,999 (£96-£192 per week)	21	9.3
	£10,000-£14,999	16	7.1
	£15,000-£19,999	24	10.6
	£20,000-£24,999	31	13.7
	£25,000-£29,999	13	5.8
	£30,000-£34,999	14	6.2
	£35,000-£39,999	17	7.5
	£40,000-£44,999	14	6.2
	£45,000-£49,999	8	3.5
	£50,000-£59,999	11	4.9
	£60,000 or more	26	11.5
	Total	226	100.0
Missing	Not Answered	38	
Total		264	

The sample for this research presented very diverse distribution in relation to the Census data, especially with the less affluent people; this possibly may have been due to students considering their individual income rather than that of their household (Figure 4.6).
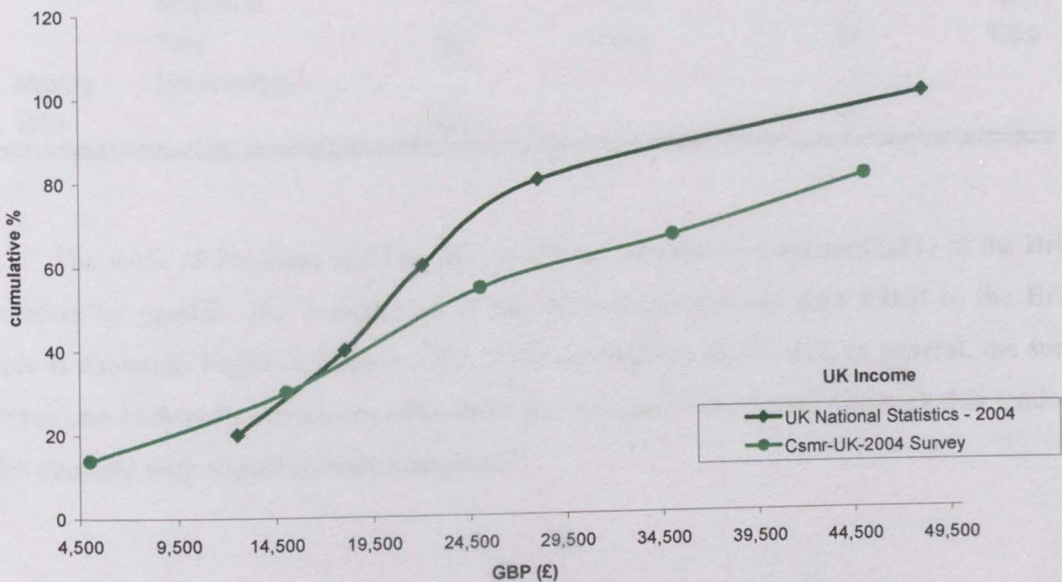
Figure 4.6 – Comparison of Income Frequencies between the British Population and the Csmr-UK-2004 Survey

Socio-Physical Variables:

HEIGHT: The heights were put into feet and inches (Imperial units) and split by gender (Table 4.7). 22.45% of the female consumers had a height of up to 5' 2" (approx. 1.57m); 13.8% were between 5' 2" to 5' 4" (approx. 1.63m); 20.3% of the respondents were between 5' 4" and 5' 6" (approx. 1.68m); 22.4% were between 5' 6" and 5' 8" (approx. 1.73m); 10.5% of female consumers were between 5' 8" and 5' 10" (approx. 1.78m); and 10.6% of the women were taller than 5' 10". In relation to the male sample, 19.4% of them declared a height of up to 5' 8"; 12.5% were between 5' 8" and 5' 10"; the men between 5' 10" and 6ft (approx. 1.83m) represented 33% of the sample and 35.1% of the male respondents were 6ft or taller.

Table 4.7 – Height Frequency Distribution within the British Consumer Survey by Gender

Csmr-**UK**-2004 Height		Gender			
		Female		Male	
		Frequency	Valid Percent	Frequency	Valid Percent
Valid	up to 5' 2"	34	22.4	2	2.3
	5' 2" to 5' 4"	21	13.8	3	3.4
	5' 4" to 5' 6"	31	20.3	2	2.3
	5' 6" to 5' 8"	34	22.4	10	11.4
	5' 8" – 5' 10"	16	10.5	11	12.5
	5' 10" - 6ft	13	8.6	29	33.0
	6ft or more	3	2.0	31	35.1
	Total	152	100.0	88	100.0
Missing	Not Answered	17		7	
Total		169		95	

The work of Pheasant and Haslegrave (2006) presents an estimated table of the British population by gender. The comparison of this estimation with the data found in the British sample is shown in Figure 4.7 below. The graph comparison shows that, in general, the survey is comprised of female consumers taller than the estimated population, although this tended to be the opposite with regard to male consumers.
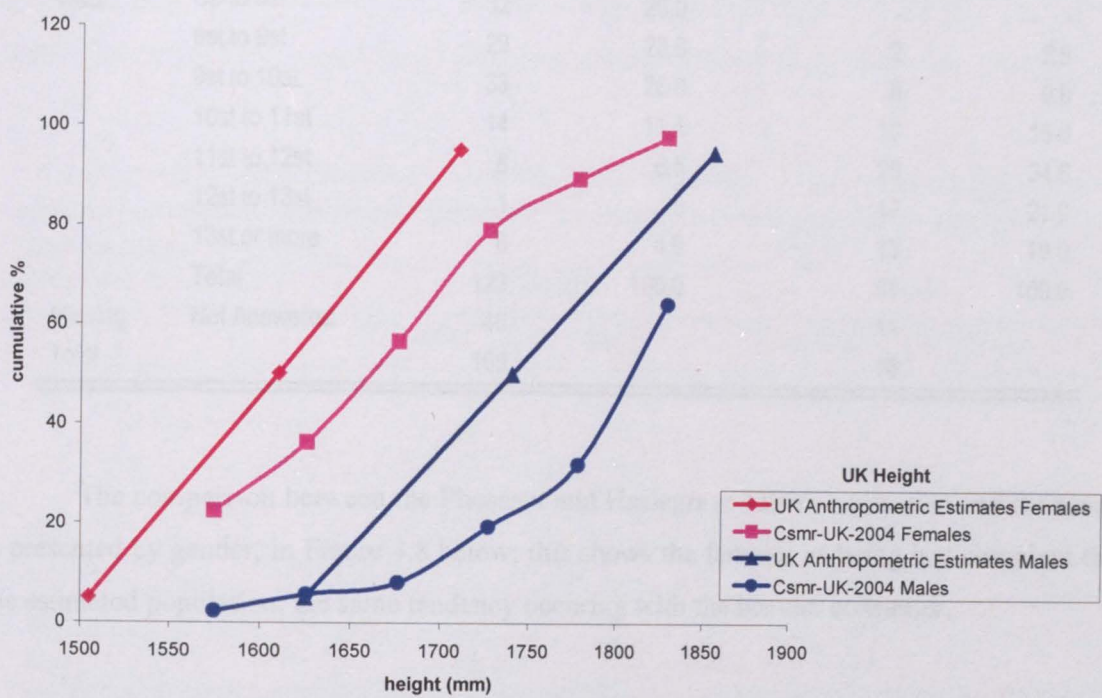
Figure 4.7 – Comparison of Height Frequencies between the British Population and the Csmr-UK-2004 Survey by Gender

WEIGHT: The weight of interviewees was requested in stones and pounds and classified by gender as shown in Table 4.8. Female consumers whose weight is up to 8 stone (approx. 51kg) represent 26% of the sample; respondents between 8 and 9 stone (approx. 57kg) are 23.6%; 26.8% of the sample are between 9 and 10 stone (approx. 63.5kg); 11.4% between 10 and 11 stone (approx. 70kg) and 12.2% of females presented a weight of 11 stone or more. The male sample presented 12.4% of consumers between 8 stone and 10 stone; 16% in between 10 stone and 11 stone; the respondents between 11 and 12 stone (approx. 76kg) are 34.6%; 21% of the men were between 12 and 13 stone (approx. 82.5kg) and finally, 16% of the male sample presented weight of 13 stone or more. Proportionally, fewer female consumers stated their weight than males, this fact suggests a female taboo issue involving their measurements and fitness.

Table 4.8 – Weight Frequency Distribution within the British Consumer Survey by Gender

Csmr-UK-2004 Weight		Gender			
		Female		Male	
		Frequency	Valid Percent	Frequency	Valid Percent
Valid	Up to 8st	32	26.0	-	-
	8st to 9st	29	23.6	2	2.5
	9st to 10st	33	26.8	8	9.9
	10st to 11st	14	11.4	13	16.0
	11st to 12st	8	6.5	28	34.6
	12st to 13st	1	.8	17	21.0
	13st or more	6	4.9	13	16.0
	Total	123	100.0	81	100.0
Missing	Not Answered	46		14	
Total		169		95	

The comparison between the Pheasant and Haslegrave (2006) estimation and the survey is presented by gender, in Figure 4.8 below; this shows the females as being less corpulent than the estimated population, the same tendency occuring with the heavier consumer.
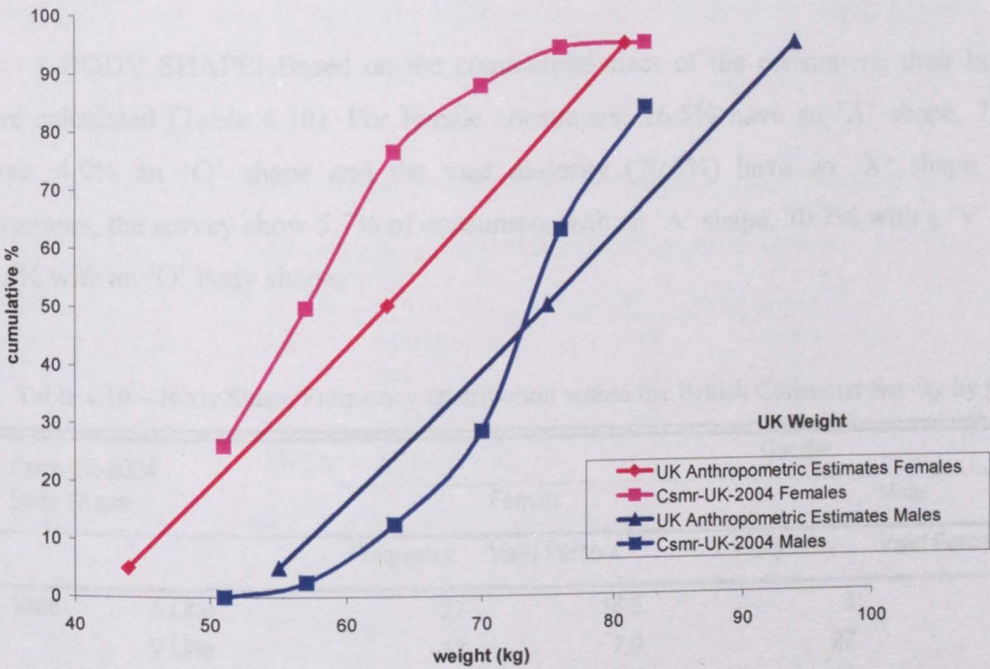
Figure 4.8 – Comparison of Weight Frequencies between the British Population and the Csmr-UK-2004 Survey by Gender

BODY MASS INDEX: Based on the height and weight of consumers, Body Mass Index was calculated. Even though the formula is the same for both genders, the data is presented separately (Table 4.9). In the female sample, 13.9% of female consumers were classified as Underweight; 72.1% had Normal Weight and 13.9% were within the Overweight category (9.0); Obese (4.2%) and Very Obese (0.8%). The male survey showed only 2.5% of the respondents were Underweight; 66.2% had a Normal Weight and 22.5% were in the Overweight range; 8.8% were Obese (including just one respondent as being Very Obese).

Table 4.9 – Body Mass Frequency Distribution within the British Consumers Survey by Gender

Csmr-UK-2004 Body Mass		Gender			
		Female		Male	
		Frequency	Valid Percent	Frequency	Valid Percent
Valid	Underweight	17	13.9	2	2.5
	Normal Weight	88	72.1	53	66.2
	Overweight	11	9.0	18	22.5
	Obese	5	4.2	7	8.8
	Very Obese	1	.8	0	0.0
	Total	122	100.0	80	100.0
Missing	Not Answered	47		15	
Total		169		95	

BODY SHAPE: Based on the commercial sizes of the consumers, their body shapes were calculated (Table 4.10). For female consumers, 16.5% have an 'A' shape, 7.9% a 'V' shape, 4.9% an 'O' shape and the vast majority (70.7%) have an 'X' shape. For male consumers, the survey show 5.7% of consumers with an 'A' shape, 30.7% with a 'V' shape and 63.6% with an 'O' body shape.

Table 4.10 – Body Shape Frequency Distribution within the British Consumer Survey by Gender

Csmr-UK-2004 Body Shape		Gender			
		Female		Male	
		Frequency	Valid Percent	Frequency	Valid Percent
Valid	A Line	27	16.5	5	5.7
	V Line	13	7.9	27	30.7
	O Line	8	4.9	56	63.6
	X Line	116	70.7	N/A	N/A
	Total	164	100.0	88	100.0
Missing	Not Answered	5		7	
Total		169		95	

The data shown and analysed in the previous sections related to the British survey and its comparison with the population, based on Census, estimation or third party work. The next section presents the data analysis for the Brazilian survey and its comparison with the population.

4.1.2 Brazilian Consumers

The profile of the survey carried out in Brazil is described below. When data was available comparisons were made with the real population.

Socio-Cultural Variables:

GENDER: The Brazilian survey was composed of 320 consumers, 69.3% of them women and 30.7% men (Table 4.11). If a comparison is made with the Brazilian official census[22], it can be noted in Figure 4.9 that the sample does not follow the same frequency distribution as in the country. One of the reliability procedures adopted in this research was to have at least 10% frequency in each category of the variable, the final results should then reflect reality. More over, women consume more fashion items than men; this difference would not seem to interfere in the analysis proposed.

Table 4.11 – Gender Frequency Distribution within the Brazilian Consumer Survey

Csmr-BR-2004 Gender		Frequency	Valid Percent
Valid	Female	219	69.3
	Male	97	30.7
	Total	316	100.0
Missing	Not Answered	4	
Total		320	

[22] Brazilian official census: Censo Brasil 2000 by IBGE – Instituto Brasileiro de Geografia e Estatística
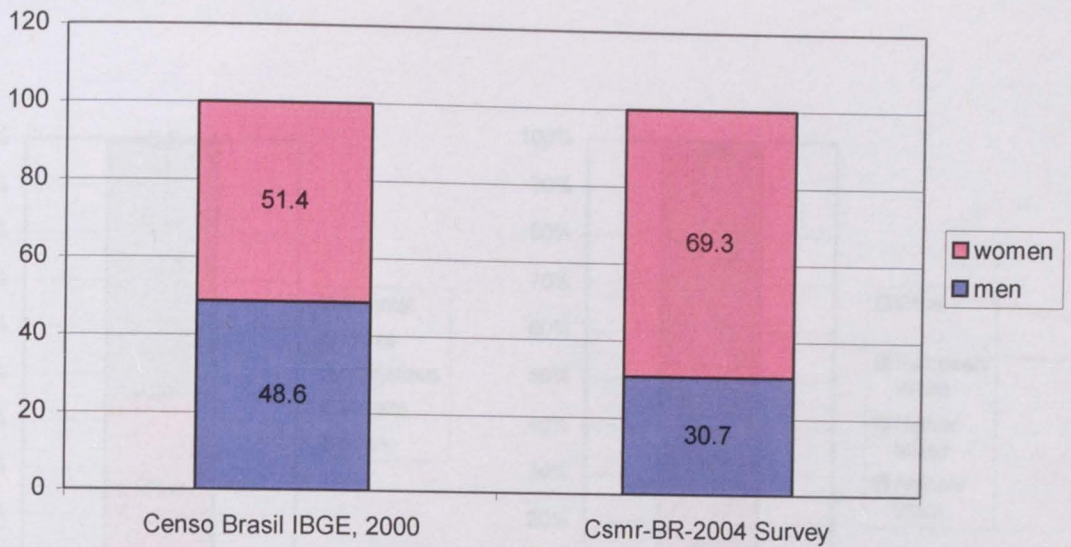
Figure 4.9 – Comparison of Gender Frequencies between the Brazilian Population and the Csmr-BR-2004 Survey

ETHNICITY: 44.5% of consumers declared themselves as predominantly European/White; 42.3% of the respondents considered themselves Native/Mixed; 10.6% of the survey declared themselves as African/Black and 2.6% were from other ethnic origins (1% Arabic, 1.6% Asian) as shown in Table 4.12. Although the results of the survey are not the same as in the official government data, it can be seen in Figure 4.10 that the proportions are very similar.

Table 4.12 – Ethnicity Frequency Distribution within the Brazilian Consumer Survey

Csmr-**BR**-2004 Ethnicity		Frequency	Valid Percent
Valid	African	5	1.6
	Arabic	3	1.0
	Native American Indian	9	2.9
	European	31	10.0
	Mixed	122	39.4
	Asian	2	.6
	White	107	34.5
	Black	28	9.0
	Other	3	1.0
	Total	310	100.0
Missing	Not Answered	10	
Total		320	
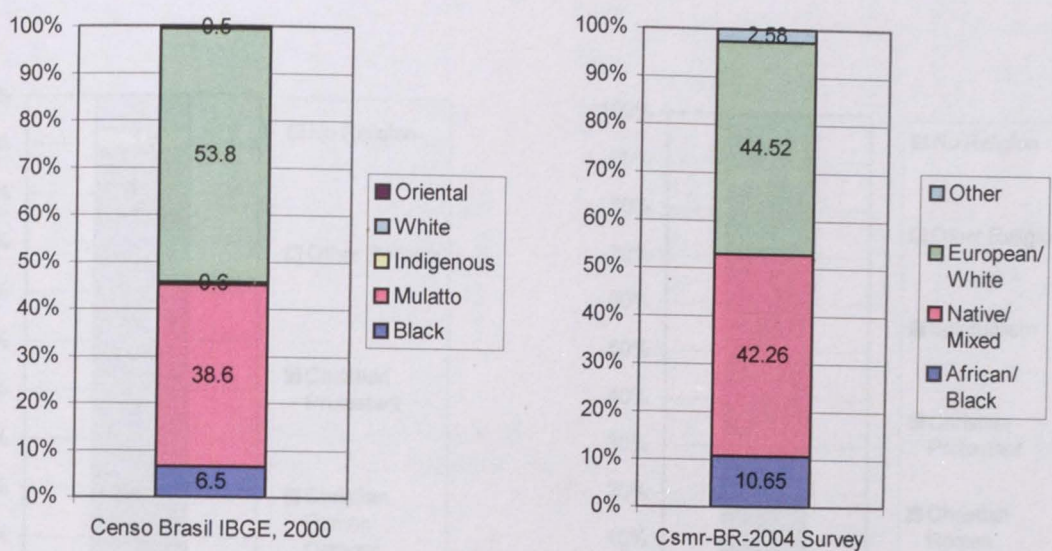
Figure 4.10 – Comparison of Ethnicity Frequencies between the Brazilian Population and the Csmr-BR-2004 Survey

RELIGION: 57.8% of consumers declared themselves Christian Roman Catholic; followed by 14.0% who considered themselves as Spiritualism followers, 13.7% of the survey stated that they were Christian Protestant, 11.1% had No Religion and 3.4% of consumers were from Other Religion (0.3% Buddhist, 0.3% Jewish, 0.3% Muslim, 0.6% African Religions and 1.9% Other Religions) as shown in Table 4.13. In comparison with the Census, the sample had more Spiritualism followers and fewer Christian Catholic consumers (Figure 4.11).

Table 4.13 – Religion Frequency Distribution within the Brazilian Consumer Survey

Csmr-**BR**-2004 Religion		Frequency	Valid Percent
Valid	Buddhist	1	.3
	Christian Roman Catholic	181	57.8
	Christian Protestant	43	13.7
	Spiritualism	44	14.0
	Jewish	1	.3
	Muslim	1	.3
	Afro-Religion (Candomblé, Umbanda)	2	.6
	No Religion	35	11.1
	Other Religion	6	1.9
	Total	314	100.0
Missing	Not Answered	6	
Total		320	
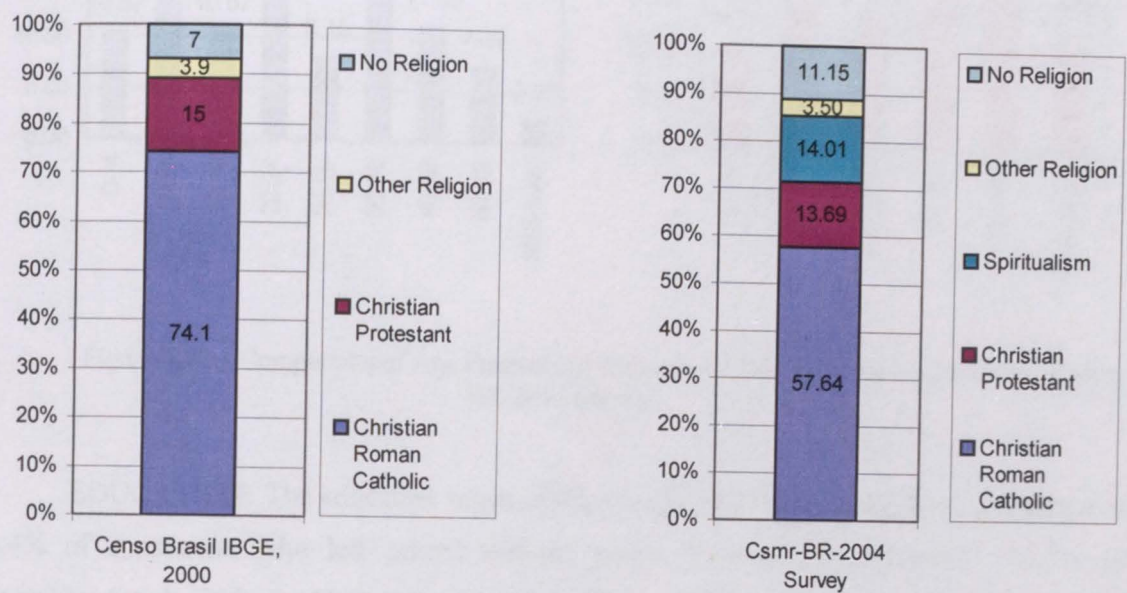
Figure 4.11 – Comparison of Religion Frequencies between the Brazilian Population and the Csmr-BR-2004 Survey

Socio-economic variables:

AGE: The age range of the survey showed 10.1% were 15-19 year old consumers, 19.6% were 20-24 year olds, 13.2% were 25-29 year olds, 22.7% were in the 30-39 range, 23.0% between 40-49 and 11.4% were 50 year olds and over (Table 4.14). The age group with the highest discrepancy between the Census data and the survey were the mature adults (40-49 years-old), as showed in Figure 4.12.

Table 4.14 – Age Frequency Distribution within the Brazilian Consumer Survey

Csmr-BR-2004 Age Range		Frequency	Valid Percent
Valid	15-19 years old	32	10.1
	20-24 years old	62	19.6
	25-29 years old	42	13.2
	30-39 years old	72	22.7
	40-49 years old	73	23.0
	50 years old or more	36	11.4
	Total	317	100.0
Missing	Not Answered	3	
Total		320	

■ Censo Brasil IBGE, 2000
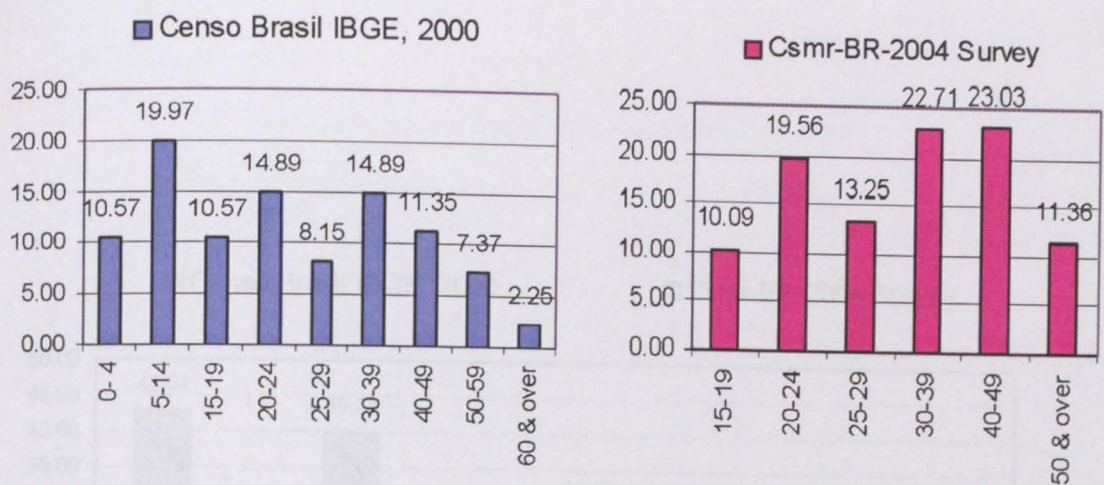
■ Csmr-BR-2004 Survey

Figure 4.12 – Comparison of Age Frequencies between the Brazilian Population and the Csmr-BR-2004 Survey

EDUCATION: The education range of the sample, showed in Table 4.15, comprised of 13.4% of consumers who left school without exams (Fundamental School)[23]; 21.9% of consumers fitted within the High School level; 26.3% had a First Degree not completed; 21.9% had a First Degree, and 16.5% of the survey declared that they had a Postgraduate Qualification (7.0% with a Specialisation, 7.9% with a Master degree and 1.6% with a PhD degree). It is important to highlight that categories with less than 10% were combined together to ensure reliable statistical analysis. A critical difference within education can be seen between the survey and the national statistics (Figure 4.13).

Table 4.15 – Education Frequency Distribution within the Brazilian Consumer Survey

Csmr-**BR**-2004 Education		Frequency	Valid Percent
Valid	Educated	5	1.6
	Left School without Taking any Exams	7	2.2
	School Qualification	10	3.3
	Left High School without Taking Any Exams	20	6.3
	High School Qualification	69	21.9
	Left College without Taking Some Exams	83	26.3
	First Degree (e.g. BA, BSc)	69	21.9
	Postgraduate Qualification (e.g. Specialisation)	22	7.0
	Master Degree	25	7.9
	PhD degree	5	1.6
	Total	315	100.0
Missing	Not Answered	5	
Total		320	

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[23] This includes all groups with little or no school education as well as those educated to elementary school level.
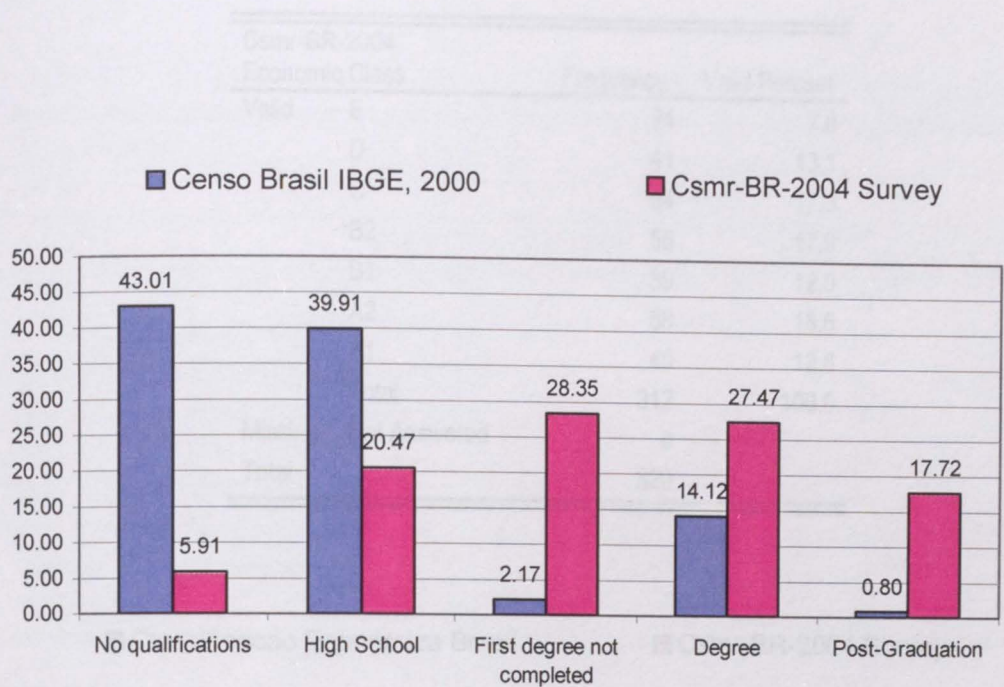
Figure 4.13 – Comparison of Education Frequencies between the Brazilian Population and the Csmr-BR-2004 Survey

INCOME: The economic class of consumers was categorised by monthly income in Brazilian currency (R$ - Reais) and compared with the ABEP (Brazilian Association of Research Companies) criteria (Table 4.16). The survey showed 7.8% of consumers were E class (family income mean of approx. £50/month); 13.1% were classified as D class (family income mean of approx. £110/month); 17.3% were classified as C class (family income mean of approx. £240/month); B2 class (family income mean of approx. £435/month) represented 17.9%; 12.5% of the survey was within B1 class (family income mean of approx. £730/month); 18.6% of the consumers family income mean was of approx. £1220/month (A2 class) and 12.8% of the survey were classified as A1 (family income of approx. £2050/month).

Figure 4.14 shows the comparison between the ABEP criteria (Classificação Econômica Brasil) estimation for the Brazilian population and the data gathered within the sample.

159

Table 4.16 – Income Frequency Distribution within the Brazilian Consumer Survey

Csmr-**BR**-2004 Economic Class		Frequency	Valid Percent
Valid	E	24	7.8
	D	41	13.1
	C	54	17.3
	B2	56	17.9
	B1	39	12.5
	A2	58	18.6
	A1	40	12.8
	Total	312	100.0
Missing	Not Answered	8	
Total		320	
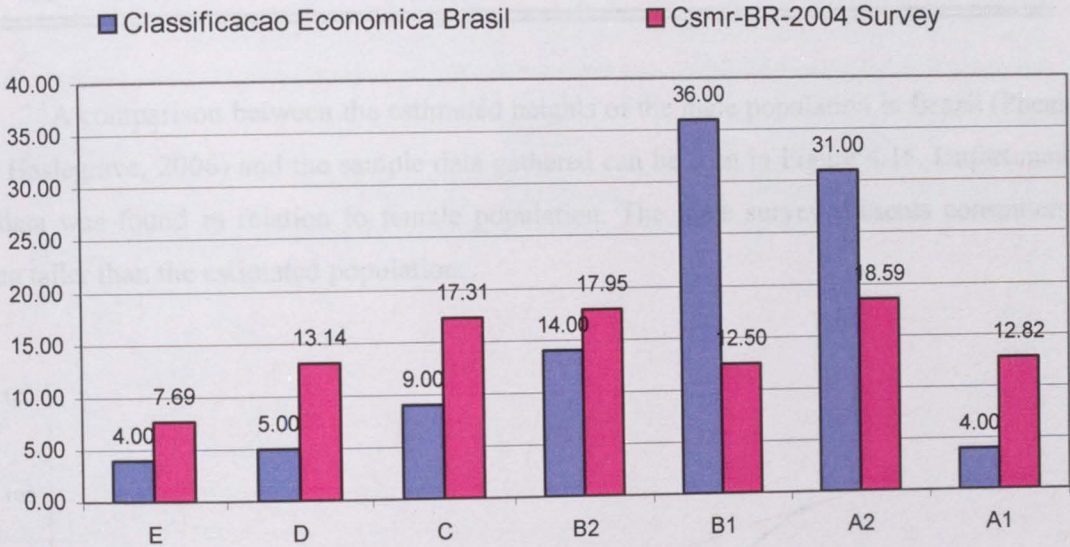
Figure 4.14 – Comparison of Income Frequencies between the Brazilian Population and the Csmr-BR-2004 Survey

Socio-Physical Variables:

HEIGHT: The heights were noted in International Standard units (metres) and later converted into feet and inches (Imperial units). The classification also considered gender (Table 4.17). In the female survey, 24.3% of the consumers have a height of up to 5' 2" (approx. 1.57m); 23.4% were classified between 5' 2" and 5' 4" (approx. 1.63m); 26.2% of the respondents are between 5' 4" and 5' 6" (approx. 1.68m); 17.7% of the women have a height measured between 5' 6" and 5' 8" (approx. 1.73m) and 8.4% of the female respondents are taller than 5' 8". In the male survey, 4.2% of the men have a height of up to 5' 4"; 17% of male consumers have a height between 5' 4" and 5' 6"; 19.2% presented height between 5' 6" and 5'

8"; 5ft 8" and 5' 10" (approx. 1.78m) represented 24.51%; and the men of 5' 10" or more represented 35.1% of the male survey.

Table 4.17 – Height Frequency Distribution within the Brazilian Consumer Survey by Gender

Csmr-BR-2004 Height		Gender			
		Female		Male	
		Frequency	Valid Percent	Frequency	Valid Percent
Valid	Up to 5' 2"	52	24.3	2	2.1
	5' 2" to 5' 4"	50	23.4	2	2.1
	5' 4" to 5' 6"	56	26.2	16	17.0
	5' 6" to 5' 8"	38	17.7	18	19.2
	5' 8" to 5' 10"	12	5.6	23	24.5
	5' 10" or more	6	2.8	33	35.1
	Total	214	100.0	94	100.0
Missing	Not Answered	5		3	
Total		219		97	

A comparison between the estimated heights of the male population in Brazil (Pheasant and Haslegrave, 2006) and the sample data gathered can be seen in Figure 4.15. Unfortunately, no data was found in relation to female population. The male survey presents consumers as being taller than the estimated population.
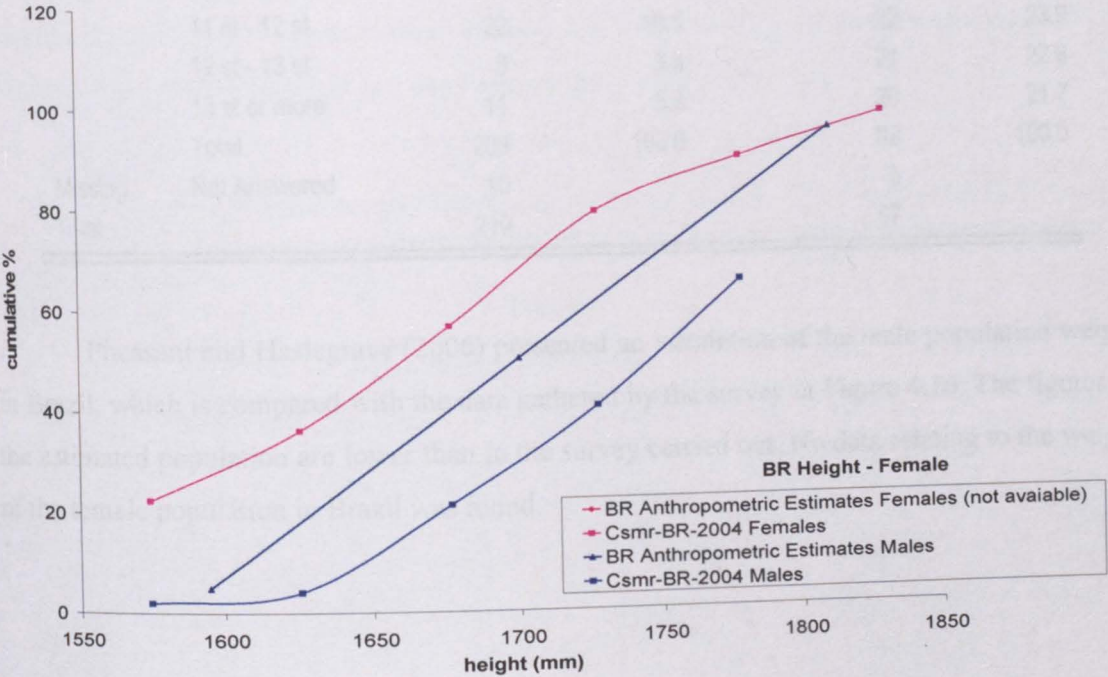
Figure 4.15 – Comparison of Height Frequencies between the Brazilian Population and the Csmr-BR-2004 Survey by Gender

WEIGHT: The weight of interviewees was recorded in kilos and later converted to stones and split by gender (Table 4.18). Female consumers whose weight was up to 8 stone (approx. 51kg) represent 14.4% of the survey; 24.9% of respondents were between 8 and 9 stone (approx. 57kg); 24.4% were between 9 and 10 stone (approx. 63.5kg); 16.7% were between 10 and 11 stone (approx. 70kg); 10.5% of respondents were between 11 and 12 stone (approx. 76kg) and 8.9% of the women declared their weight as 12 stone or more. The male survey showed, 16.3% are up to 10 stone, 15.3% declared themselves to weigh between 10 and 11 stone; 23.9% of men were between 11 and 12 stone; 22.8% from 12 to 13 stone (approx. 82.5kg) and finally, 21.7% of the male survey presented a weight of 13 stone or more.

Table 4.18 – Weight Frequency Distribution within the Brazilian Consumer Survey by Gender

Csmr-**BR**-2004 Weight		Gender			
		Female		Male	
		Frequency	Valid Percent	Frequency	Valid Percent
Valid	Up to 8 st	30	14.4	1	1.1
	8 st - 9 st	52	24.9	4	4.3
	9 st - 10st	51	24.4	10	10.9
	10st - 11 st	35	16.7	14	15.3
	11 st - 12 st	22	10.5	22	23.9
	12 st - 13 st	8	3.8	21	22.8
	13 st or more	11	5.3	20	21.7
	Total	209	100.0	92	100.0
Missing	Not Answered	10		5	
Total		219		97	

Pheasant and Haslegrave (2006) presented an estimation of the male population weight in Brazil, which is compared with the data gathered by the survey in Figure 4.16. The figures of the estimated population are lower than in the survey carried out. No data relating to the weight of the female population in Brazil was found.
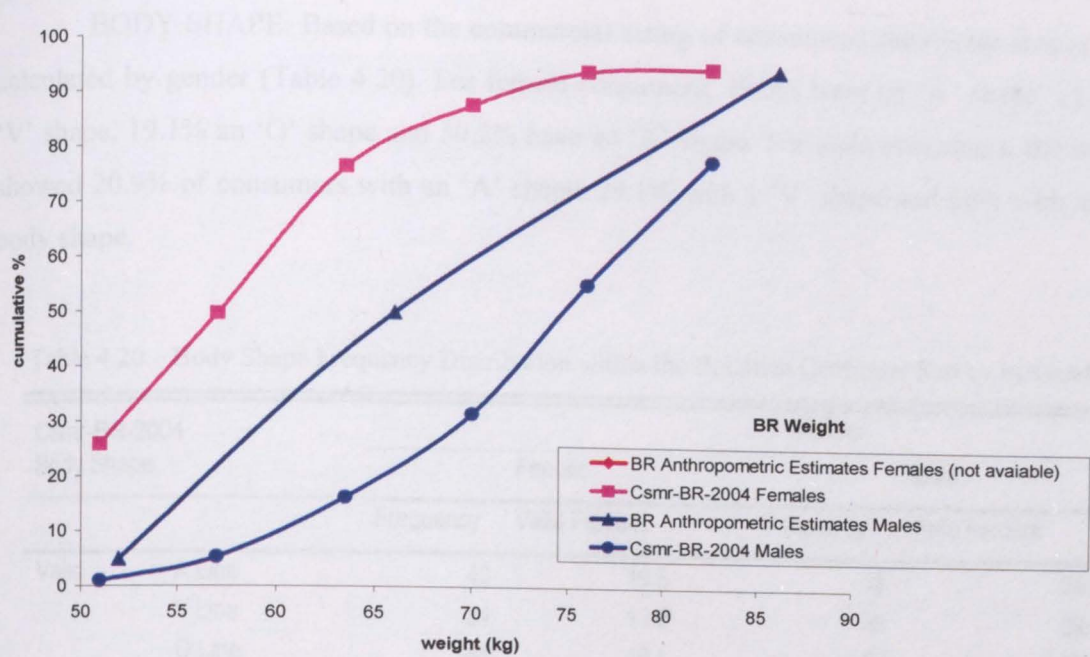
Figure 4.16 – Comparison of Weight Frequencies between the Brazilian Population and the Csmr-BR-2004 Survey by Gender

BODY MASS INDEX: Based on the height and weight of consumers, the Body Mass Index was calculated and classified by gender (Table 4.19). 10.1% of the female consumers were classified as Underweight; 61.8 % of the survey have a Normal Weight; 21.3% of the female respondents are in the Overweight range and 6.8% are within the Obese and Very Obese classification. Within the male sample, 6.5% of the respondents are in the Underweight classification; 50% presented Normal Weight; 33.7% of the men are Overweight and 9.8% are in the Obese category (including a very obese individual).

Table 4.19 – Body Mass Frequency Distribution within the Brazilian Consumer Survey by Gender

Csmr-**BR**-2004 Body Mass		Gender			
		Female		Male	
		Frequency	Valid Percent	Frequency	Valid Percent
Valid	Underweight	21	10.1	6	6.5
	Normal Weight	128	61.8	46	50.0
	Overweight	44	21.3	31	33.7
	Obese	13	6.3	9	9.8
	Very Obese	1	.5	0	0
	Total	207	100.0	92	100.0
Missing	Not Answered	12		5	
Total		219		97	

BODY SHAPE: Based on the commercial sizing of consumers, their body shapes were calculated by gender (Table 4.20). For female consumers, 19.5% have an 'A' shape, 11.2% a 'V' shape, 19.1% an 'O' shape and 50.2% have an 'X' shape. For male consumers, the sample showed 20.9% of consumers with an 'A' shape, 29.1% with a 'V' shape and 50% with an 'O' body shape.

Table 4.20 – Body Shape Frequency Distribution within the Brazilian Consumer Survey by Gender

Csmr-BR-2004 Body Shape		Gender			
		Female		Male	
		Frequency	Valid Percent	Frequency	Valid Percent
Valid	A Line	42	19.5	18	20.9
	V Line	24	11.2	25	29.1
	O Line	41	19.1	43	50.0
	X Line	108	50.2	N/A	N/A
	Total	215	100.0	86	100.0
Missing	Not Answered	4		11	
Total		219		97	

No data was found in relation to the body shape of Brazilian population, although some anthropometric data is available.

This section presented the data gathered in the Brazilian survey, and showed when possible, a comparison of the survey with the population of Brazil. This analysis can help with further planned research. The next section presents the characterisation of the Chinese survey and its correspondence with the Chinese population.

4.1.3 Chinese Consumers

The profile of the survey carried out with Chinese consumers is described below. Some comparisons with population data were also made when this data was available.

Socio-Cultural Variables:

GENDER: The Chinese survey consists of 227 consumers, 63.4% of them women and 36.6% men (Table 4.21). If a comparison is made with the official Census, it can be noted that the survey does not follow the same proportionate gender distribution for this country (Figure 4.17). Despite this difference, the statistical tests being used can accommodate the distinct preferences between the genders.

Table 4.21 – Gender Frequency Distribution within the Chinese Consumer Survey

Csmr-**CN**-2004 Gender		Frequency	Valid Percent
Valid	Female	142	63.4
	Male	82	36.6
	Total	224	100.0
Missing	Not Answered	3	
Total		227	
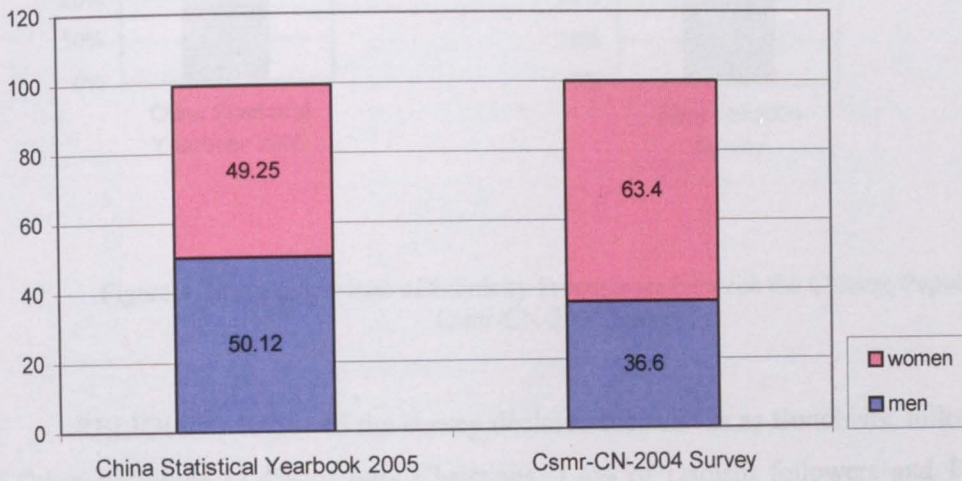
Figure 4.17 – Comparison of Gender Frequencies between Chinese Population and the Csmr-CN-2004 Survey[24]

ETHNICITY: The majority of consumers declared themselves as Han (98.7%) and only 1.3% of the survey considered themselves Manchu ethnicity (Table 4.22). No other ethnic minorities were recorded in this survey. This result makes it impossible to categorise the ranges of at least 10% of frequency, as desired. However, if compared with the real Census database in Figure 4.18, the trend was not biased.

Table 4.22 – Ethnicity Frequency Distribution within the Chinese Consumer Survey

Csmr-**CN**-2004 Ethnicity		Frequency	Valid Percent
Valid	Han	221	98.7
	Manchu	3	1.3
	Total	224	100.0
Missing	Not Answered	3	
Total		227	

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[24] Population over 14 years old, China National Statistics
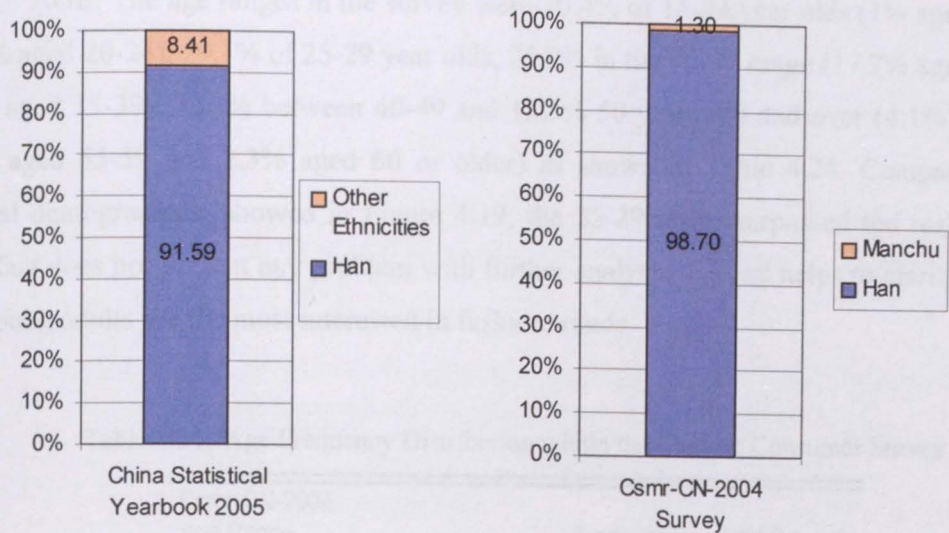
Figure 4.18 – Comparison of Ethnicity Frequencies between the Chinese Population and the Csmr-CN-2004 Survey

RELIGION: 10.5% of the survey declared themselves as Buddhists; followed by 23.5% of Other Religions (3.4% of new Christians, 1.4% of Daoism followers and 18.7% of other religions not specified) and 66.0% of the consumers declared themselves to have No Religion (Table 4.23). It is a fact that religion in China is still not an 'open issue' and that the government does not encourage any kind of belief. Until the present time, some faiths could only be practised at home and no official statistics about the percentages of followers of religions could be found in the Census.

Table 4.23 – Religion Frequency Distribution within the Chinese Consumer Survey

Csmr-**CN**-2004 Religion		Frequency	Valid Percent
Valid	Buddhist	22	10.5
	New Catholic Christian	7	3.4
	Daoism	3	1.4
	No Religion	138	66.0
	Other	39	18.7
	Total	209	100.0
Missing	Not Answered	18	
Total		227	

Socio-Economic Variables:

AGE: The age ranges in the survey were 20.4% of 15-24 year olds (1% aged 15-24 and 19.5% aged 20-24), 29.1% of 25-29 year olds, 25.9% in the 30-39 range (17.7% aged 30-34 and 8.2% aged 35-39), 12.3% between 40-49 and 12.3% 50 years old and over (4.1% aged 50-54; 5.9% aged 55-59 and 2.3% aged 60 or older) as shown in Table 4.24. Compared with the official demographics, showed in Figure 4.19, the 25-29 range surpassed the real proportion. This fact does not present any problem with further analysis, instead helps to clarify whether or not young adults are the most interested in fashion trends.

Table 4.24– Age Frequency Distribution within the Chinese Consumer Survey

Csmr-**CN**-2004 Age Range		Frequency	Valid Percent
Valid	15-24 years old	45	20.4
	25-29 years old	64	29.1
	30-34 years old	39	17.7
	35-39 years old	18	8.2
	40-49 years old	27	12.3
	50 years old or more	27	12.3
	Total	220	100.0
Missing	Not Answered	7	
Total		227	
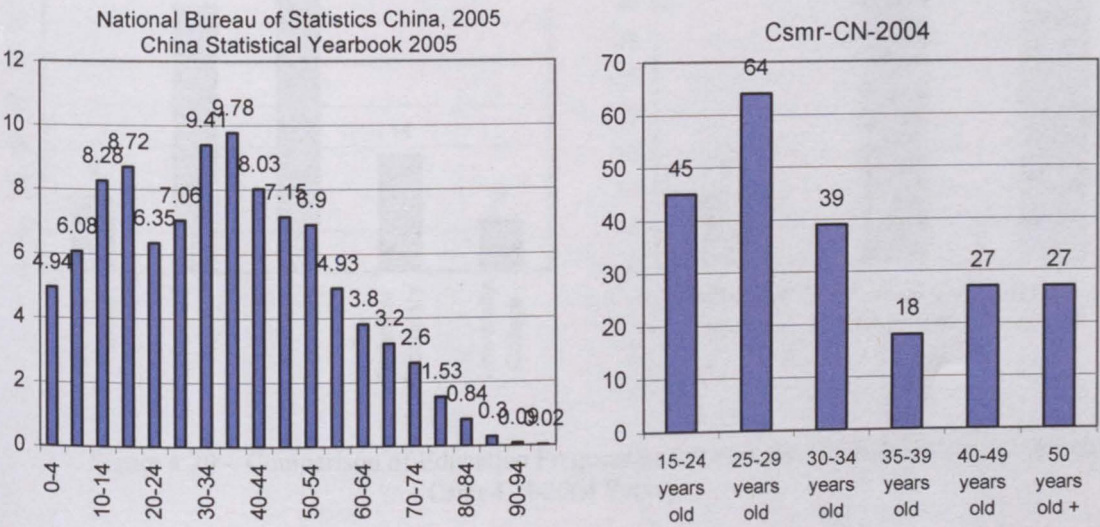
Figure 4.19 – Comparison of Age Frequencies between the Chinese Population and the Csmr-CN-2004 Survey

167

EDUCATION: The educational range of the survey comprised of 9.4% of consumers at Middle/High School level; 43.8% of consumers had a Technical College level education, and 46.8% of the survey said they had a Graduate Degree (Table 4.25). Compared with official demographics in Figure 4.20, the survey shows a large discrepancy, especially in the Graduate Degree range. But the analysis is valuable and reliable due to the choice of statistical tests.

Table 4.25 – Education Frequency Distribution within the Chinese Consumer Survey

Csmr-**CN**-2004 Education		Frequency	Valid Percent
Valid	Middle/High school	21	9.4
	Technical College	98	43.8
	Graduate Degree	105	46.8
	Total	224	100.0
Missing	Not Answered	3	
Total		227	
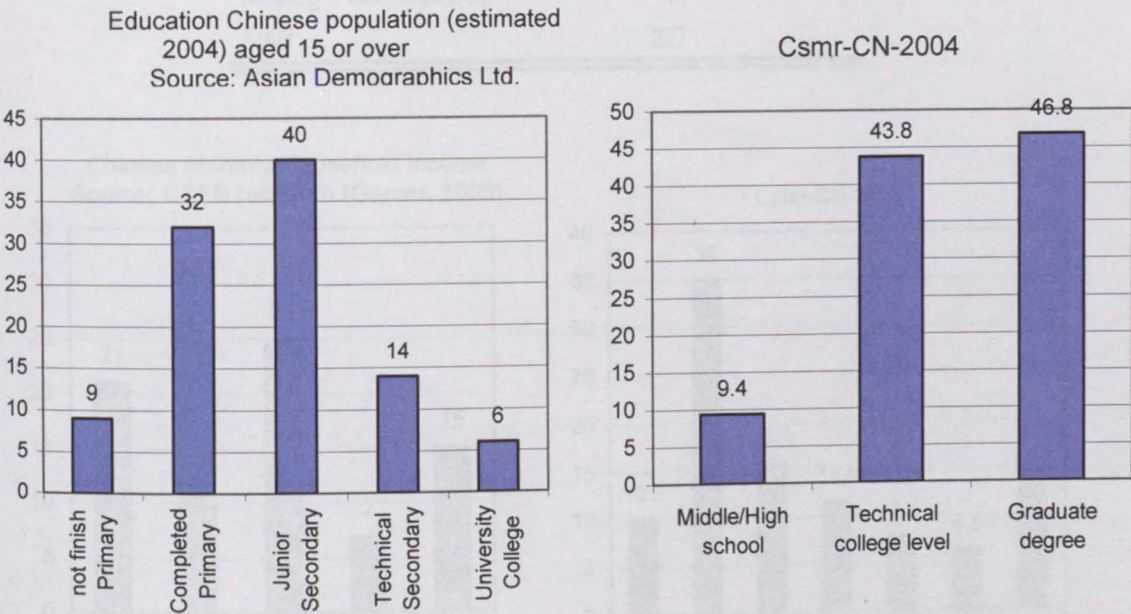
Figure 4.20 – Comparison of Education Frequencies between the Chinese Population and the Csmr-CN-2004 Survey

INCOME: In the survey, 10.2% of the consumers had a monthly income of approximately £68 (up to 999 RMB); 35.0% received between £68 and £137 (1,000 to 1,999 RMB); the interviewees with income from £138 to £240 (2,000 to 3,499 RMB) represented 16.1% of the survey; 11.5% were within the £241 to £343 range (3,500 to 5,000 RMB); 7.8% had an income from £344 to £549 (5,000 to 8,000 RMB); 6.5% of the consumers received £550 or more (8,000 RMB) and 12.9% of the consumers stated they had no income as shown in Table 4.26. In comparison with official data, the great difference is in the lower income categories, this is probably due to a greater number of students taking part in the survey (Figure 4.21).

Table 4.26 – Income Frequency Distribution within the Chinese Consumer Survey

Csmr-CN-2004 Income		Frequency	Valid Percent
Valid	Up to 999 RMB	22	10.2
	1000-2000 RMB	76	35.0
	2000-3500 RMB	35	16.1
	3500-5000 RMB	25	11.5
	5000-8000 RMB	17	7.8
	8000 RMB or more	14	6.5
	No Income	28	12.9
	Total	217	100.0
Missing	Not Answered	10	
Total		227	
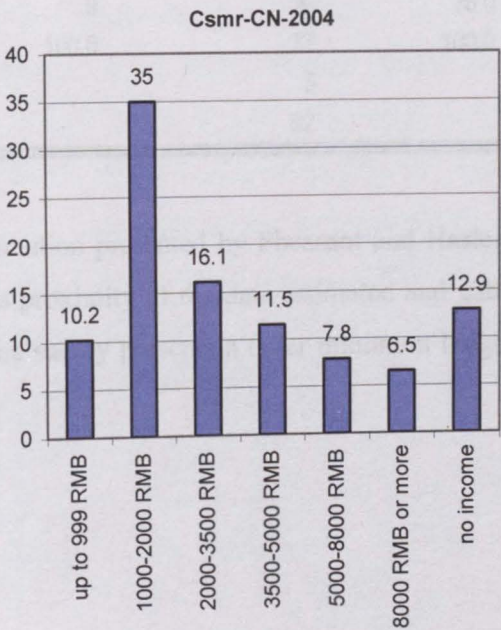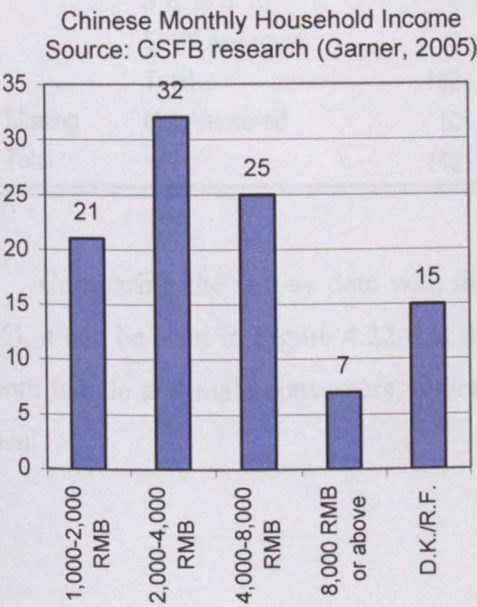
Figure 4.21 – Comparison of Income Frequencies between the Chinese Population and the Csmr-CN-2004 Survey

Socio-Physical Variables:

HEIGHT: The heights were requested in feet and inches (Imperial units) or metric units, although some consumers answered using the old Chinese measurement units (Chi and Li). The data was all converted in to Imperial units and classified by gender (Table 4.27). In the female survey, 16.7% of the consumers have a height of up to 5' 2" (approx. 1.57m); 41.7% were classified between 5' 2" and 5' 4" (approx. 1.63m); 36.3% of the respondents are between 5' 4" and 5' 6" (approx. 1.68m) and 5.3% of the women measure 5' 6" or more. Within the men, 26% of the male respondents are up to 5' 6"; 23.3% are between 5' 6" to 5' 8" (approx. 1.73m); male consumers with a height between 5' 8" and 5' 10" (approx. 1.78m) represented 24.7% and the ones with a height of 5' 10" or more represented 26% of the survey.

Table 4.27 – Height Frequency Distribution within the Chinese Consumer Survey by Gender

Csmr-CN-2004 Height		Gender			
		Female		Male	
		Frequency	Valid Percent	Frequency	Valid Percent
Valid	Up to 5' 2"	22	16.7	0	0
	5' 2" to 5' 4"	55	41.7	2	2.6
	5' 4" to 5' 6"	48	36.3	18	23.4
	5' 6" to 5' 8"	6	4.5	18	23.3
	5' 8" to 5' 10"	1	.8	19	24.7
	5' 10" and more	0	0	20	26.0
	Total	132	100.0	77	100.0
Missing	Not Answered	10		5	
Total		142		82	

Comparing the survey data with the estimation presented by Pheasant and Haslegrave (2006), it can be seen in Figure 4.22 that there is proximity of the data estimated and gathered for both female and male consumers, although the survey presents a taller minimum height for women.
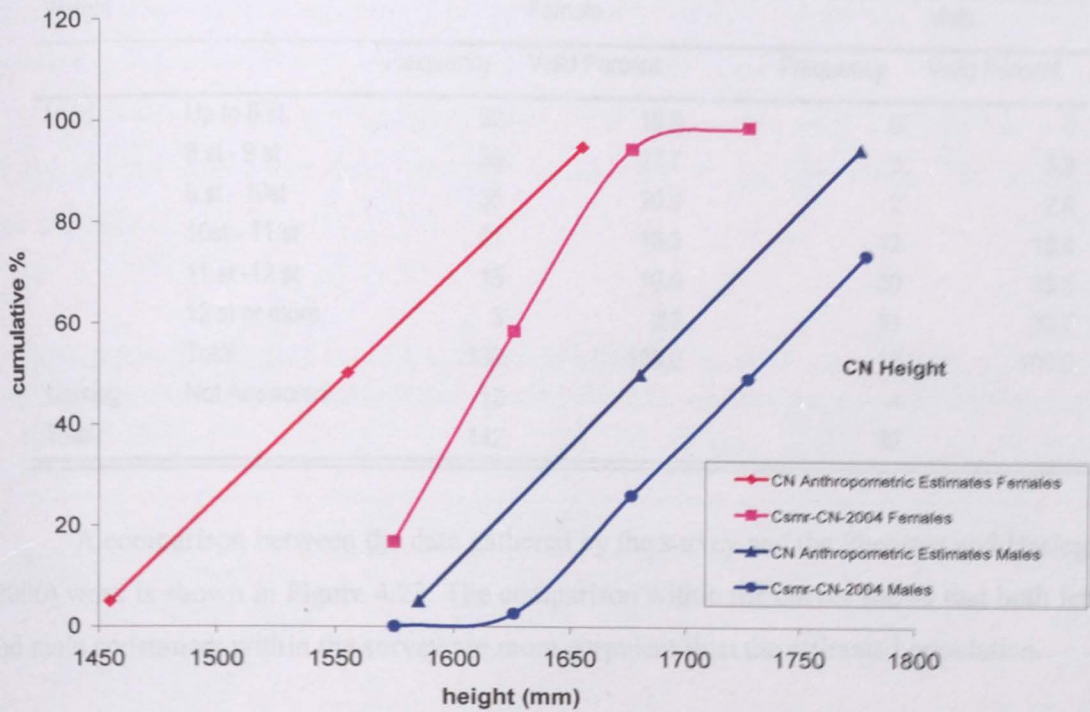
Figure 4.22 – Comparison of Height Frequencies between the Chinese Population and the Csmr-CN-2004 Survey by Gender

WEIGHT: The weight of the interviewees was requested in stones and pounds or kilograms, but some respondents answered using the Chinese traditional unit (Jin). All data was converted to Imperial units and classified by gender (Table 4.28). Female consumers who weighed up to 8 stone (approx. 51kg) represented 16.9% of the sample; respondents between 8 and 9 stone (approx. 57kg) represented 27.7%; 26.9% of the survey were between 9 and 10 stone (approx. 63.5kg); 16.2% were between 10 and 11 stone (approx. 70kg); and 12.3% of the survey weighed 11 stone or more. In the male survey, 6.4% of the consumers weighed up to 10 stone; 15.4% of the men were between 10 and 11 stone; the respondents between 11 and 12 stone (approx. 76kg) represented 38.5% and 39.7% of the male respondents were between 12 and 13 stone (approx. 82.5kg).

Table 4.28 – Weight Frequency Distribution within the Chinese Consumer Survey by Gender

Csmr-CN-2004 Weight		Gender			
		Female		Male	
		Frequency	Valid Percent	Frequency	Valid Percent
Valid	Up to 8 st	22	16.9	0	0
	8 st - 9 st	36	27.7	3	3.8
	9 st - 10st	35	26.9	2	2.6
	10st - 11 st	21	16.2	12	15.4
	11 st -12 st	13	10.0	30	38.5
	12 st or more	3	2.3	31	39.7
	Total	130	100.0	78	100.0
Missing	Not Answered	12		4	
Total		142		82	

A comparison between the data gathered by the survey and the Pheasant and Haslegrave (2006) work is shown in Figure 4.23. The comparison within the curves shows that both female and male consumers within the survey are more corpulent than the estimated population.
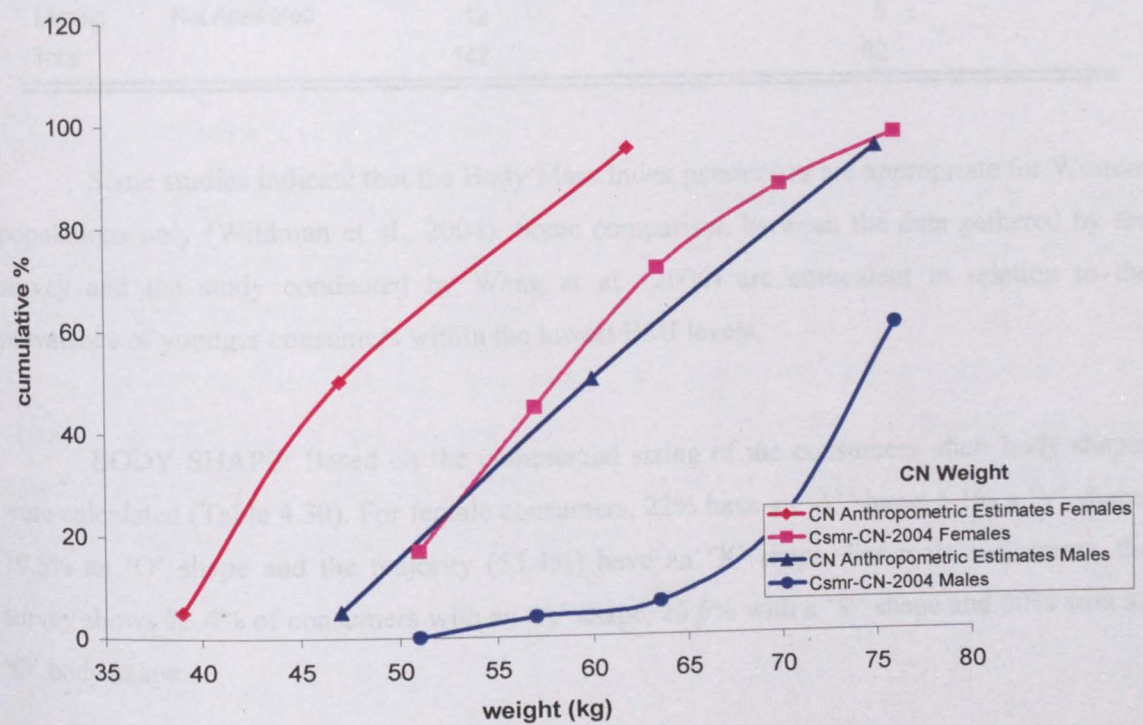
Figure 4.23 – Comparison of Weight Frequencies between the Chinese Population and the Csmr-CN-2004 Survey by Gender

BODY MASS INDEX: Based on the height and weight of consumers, the Body Mass Index was calculated and categorised by gender (Table 4.29). In the female survey, 20% of the consumers were classified as Underweight; 71.5% of the sample have a Normal Weight and 8.5% of the women are Overweight or Obese. Within the males, only 3.9% are Underweight; 68.8% of the consumers have Normal Weight and 27.3% are within the Overweight classification.

Table 4.29 – Body Mass Frequency Distribution within the Chinese Consumer Survey by Gender

Csmr-**CN**-2004 Body Mass		Gender			
		Female		Male	
		Frequency	Valid Percent	Frequency	Valid Percent
Valid	Underweight	26	20.0	3	3.9
	Normal Weight	93	71.5	53	68.8
	Overweight	10	7.7	21	27.3
	Obese	1	.8	0	0
	Total	130	100.0	77	100.0
Missing	Not Answered	12		5	
Total		142		82	

Some studies indicate that the Body Mass Index parameters are appropriate for Western populations only (Wildman et al., 2004). Some comparison between the data gathered by the survey and the study conducted by Wang et al. (2006) are coincident in relation to the prevalence of younger consumers within the lowest BMI levels.

BODY SHAPE: Based on the commercial sizing of the consumers, their body shapes were calculated (Table 4.30). For female consumers, 22% have an 'A' shape, 5.1% a 'V' shape, 19.5% an 'O' shape and the majority (53.4%) have an 'X' shape. For male consumers, the survey shows 23.4% of consumers with an 'A' shape, 26.6% with a 'V' shape and 50% with an 'O' body shape.

173

Table 4.30 – Body Shape Frequency Distribution within the Chinese Consumer Survey by Gender

Csmr-CN-2004 Body Shape		Gender			
		Female		Male	
		Frequency	Valid Percent	Frequency	Valid Percent
Valid	A line	26	22.0	15	23.4
	V line	6	5.1	17	26.6
	O line	23	19.5	32	50.0
	X line	63	53.4	N/A	N/A
	Total	118	100.0	64	100.0
Missing	Not Answered	24		18	
Total		142		82	

Although Body Shape has been studied often, no work could be found about the Chinese population to compare with the data gathered by the survey.

The Chinese survey was fully characterised in this section aiming to support further analysis. The next section will present some comparison between the surveys and populations of United Kingdom, Brazil and China.

4.1.4   Consumer Comparison

Some distinctions between these three targets are highlighted in this section. Although some of the categories cannot be compared directly because of culture, society and local aesthetic preferences, some points can be raised.

Significant differences were encountered within the three targeted countries. In the *Ethnicity* analysis, the UK was predominantly White; in China the vast majority were Han descendents and in Brazil, although a considerable number of consumers declared themselves as White, the proportion of mixed and Black ethnicity was significantly higher than in the other two national surveys.

Within the *Religion* category the British survey showed almost half of the consumers declared themselves to be Christian with a significant percentage of No Religion respondents. In the Brazilian survey the vast majority considered themselves to be Christians (more than 70%) with a small percentage of Other Religions and No Religion respondents. In the Chinese survey the vast majority declared that they have No Religion, with a significant percentage of Other Religion followers and Buddhists.

Age distribution in these three countries is diverse with Brazil presenting the youngest population in comparison with the UK and China (Figures 4.24; 4.25 and 4.26). However, in contrast, with the surveys the Brazilian consumers presented proportionally the oldest mean age.
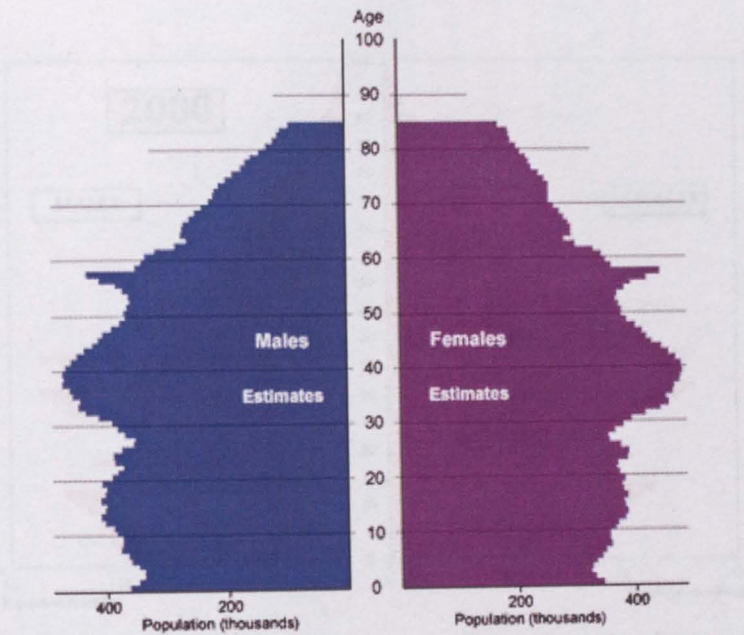
Figure 4.24 - British Population by Gender and Age (National Statistics, 2004)

Age in millions

	80 +	
	75 a 79	
	70 a 74	
	65 a 69	
	60 a 64	
	55 a 59	
	50 a 54	
	45 a 49	
	40 a 44	
	35 a 39	
	30 a 34	
	25 a 29	
	20 a 24	
	15 a 19	
	10 a 14	
	5 a 9	
	0 a 4	

10 000 8 000 6 000 4 000 2 000   0   0   2 0004 0006 000 8 000 10 000

■ **Males**   ■ **Females**
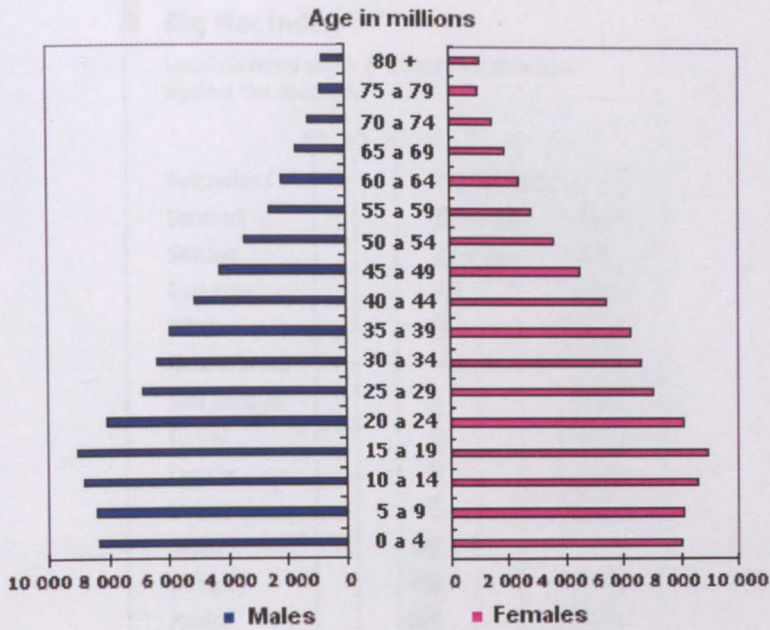
Figure 4.25 - Brazilian Population by Gender and Age (IBGE, Censo Demográfico 2000)

2000

MALES   FEMALES

90+
85
80
75
70
65
60
55
50
45
40
35
30
25
20
15
10
5
0

15   10   5   0   0   5   10   15

Population in millions   Population in millions
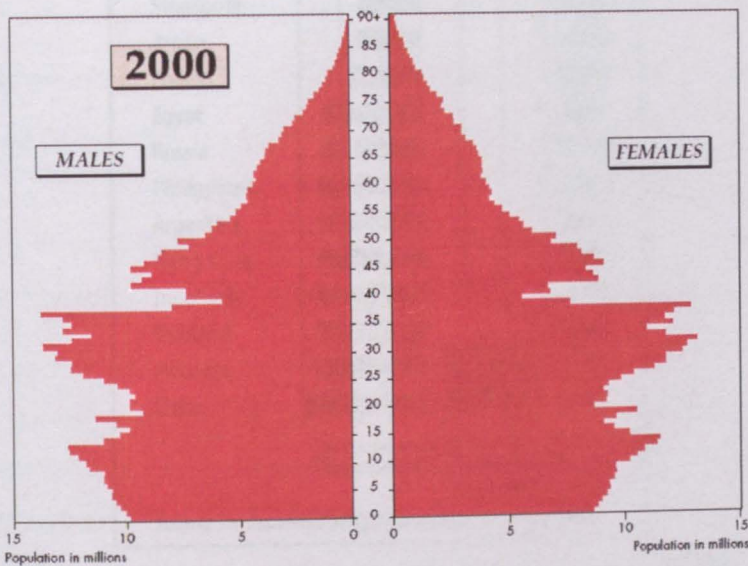
Figure 4.26 - Chinese Population by Gender and Age (Statistical Bureau, 2000)

In all three samples, the number of respondents with a first or a post-graduate degree is far higher than in the official data on *Education*. This fact reveals a higher interest from educated people in attempting to better understand their consumption.

When comparing *Income*, it is necessary to highlight the discrepancy between living costs in these countries. The Economist launched the Big Mac index to help to equalise the cost of a basket of goods and services, as can been seen in Figure 4.27.

Big Mac index

Local currency under (–)/over (+) valuation
against the dollar, %

Country		Big Mac price*, $
	60 40 20 – 0 + 20 40 60	
Switzerland		4.93
Denmark		4.49
Sweden		4.28
Euro area		3.51†
Britain		3.32
United States	nil	3.15‡
New Zealand		3.08
Turkey		3.07
Canada		3.01
Chile		2.98
Brazil		2.74
Hungary		2.71
Mexico		2.66
Czech Republic		2.60
South Korea		2.56
Australia		2.44
Taiwan		2.35
South Africa		2.29
Singapore		2.20
Japan		2.19
Poland		2.09
Egypt		1.61
Russia		1.60
Philippines		1.56
Argentina		1.55
Hong Kong		1.55
Indonesia		1.54
Thailand		1.51
Malaysia		1.47
China		1.30

*At market exchange rate (January 9th)
†Weighted average of member countries
‡Average of four cities

Source: *The Economist* using McDonald's price data 2006

Figure 4.27 – The Big Mac Index (The Economist, Jan 12th 2006)

An interesting way to make this comparison is by using the Purchasing Parity Power[25] index released annually by the World Bank (Figure 4.28). In the UK survey the majority of consumers came from a middle economic class; in the Brazil survey they came from a middle economic class and in the China survey they were from the lower economic class.

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[25] Purchasing Power Parity (PPP) expresses the notion that with a unit of purchasing power (eg. Dollar), it should be possible to buy the same amount of goods and services anywhere in the world. It is important because of its ability to predict relative prices (Neary, 2004).

Figure 4.28 - Countries by GDP (Purchasing Power Parity) in billions of US dollars for 2005 (World Bank, 2005)

In relation to physical differences, the key issue is related to body volume; ethnic origin has a considerable influence on both *Height* and *Weight* as well the proportion of the *Body*. The Caucasian body is taller and curvier, the Asian body is shorter and straight and the South American body is a mix of the two, from shorter and curvy to taller and straight.

It is important to highlight that in the data gathered within all the three countries, the figures tended to be higher than the estimated population of each country. This finding suggests a substantial increase of body measurement in the world, possibly due to eating habits, and highlights urgency for further studies that focus on physical characteristics, its interaction with products and the implications of the increase in body profiles for clothing design.

Life styling and aging phenomena also have considerable influence on the *Body Mass Index*. With the British and Chinese surveys, comprising mainly of young consumers, the incidence of Normal Weight was around 70%, whilst in the Brazilian survey, with older consumers, the incidence of Normal Weight was less than 60%.

In addition to all the data described above, some consideration should be given to emphasizing differences between the three-targeted countries, especially in relation to fashion clothing consumption.

British consumers can be divided into two large and opposing groups: the ones who love fashion, who love to show off and stand out-from-the-crowd and the ones who hate fashion and normally buy clothing for functional use. Both groups have a custom of giving away clothes often to charity shops, and/or acquiring second-hand garments.

178

The Brazilians like sensual enhancing clothes and normally do not accept second hand garments. Two reasons can explain this: people in Brazil with the religious syncretism of their European, African and Native roots believe that clothes retain the energy of the user, guiding not only the body but also the soul; and as Brazil is geographically located between the tropics, sweating is natural and clothes become impregnated with the user's smell.

Chinese consumers' discovery of fashion is more recent. Everything that seems to be Western appears trendy, but the vast majority of consumers still search for traditional and comfortable items. Especially with younger consumers, the culture of enjoying imitation items is prevalent, they compete to see who has the best copy at the cheapest price.

This section presented a brief comparison of the three targeted groups of consumers in this research, not only in relation to their cultural differences, but also in relation to their economic and physical distinctions.

Before entering the discussion of consumer behaviour in relation to fashion clothing consumption based on the surveys which will be presented in Section 4.4 for qualitative analysis and Section 4.8 for quantitative analysis, the next section presents a characterisation of the designer data gathered, followed by the same description and discussion for company data.

4.2   DISCUSSION OF DESIGNER SURVEY FINDINGS

In order to provide a better understand of the stakeholders inside fashion clothing product development, data was collected from designers and presented below.

Twenty fashion designers were interviewed in the United Kingdom, Brazil and China in 2005. All designers are active in the competitive fashion industry: mature or emergent, local or global, Western or Eastern market. Quantitative and qualitative data collection methods were undertaken to investigate their educational background, position, and skills, ability to envisage improvements and target groups.

The main information about the characteristics of the survey, its context and practices are shown in next section.

4.2.1   Designer Survey Profile

Detailed questions were asked about each designer's profile. The majority of designers from the three countries interviewed had between 8 to 15 years of experience. Table 4.31 shows the surveyed designers' profiles, with the interviewees classified by their education. The vast majority of designers within the survey have a formal fashion education.

179

In the UK, as fashion is considered a creative industry, the large field of Arts and Humanities containing fashion education and its influence makes the flow between areas more flexible. The designers without degrees from an Arts and Humanities field tended to be Brazilian, this is possibly due to the lack of tradition in fashion courses in Brazilian universities, although in the last 15 years the number of universities offering fashion courses has grown from 1 to 60. In China, due to severe competition within the market, professionals with a background in a specific field, such as fashion, are the ones preferred by the fashion industry.

Table 4.31 - Designers' Educational Background by Nationality

N=20	Educational Background		
	Fashion	Arts & Humanities	Other
Dsgn-**UK**-2005	4	2	0
Dsgn-**BR**-2005	6	0	3
Dsgn-**CN**-2005	5	0	0

Table 4.32 shows the years of experience the designers have within the industry. The British designers in the survey have fewer years of practice compared with the Chinese, and the Brazilians are the most experienced within the market. This finding does not seem to be a tendency, but a result of a random sample. In fact, British fashion industry has more tradition in relation to the other two countries. The Brazilian fashion industry is more recent, although its clothing industry is experienced, this is possibly an indication that the clothing industry in Brazil is attempting to develop its fashion industry. In China, the fashion industry changes fast, the designers with at least some years of experience can lead a design team within a company; the entrepreneurial designers appear to prefer to work in a big company first.

Table 4.32- Designers' Years of Experience by Nationality

N=20	Years of Work in Fashion Industry			
	Up to 3	From 4 to 7	From 8 to 15	16 or more
Dsgn-**UK**-2005	3	2	1	0
Dsgn-**BR**-2005	2	2	3	2
Dsgn-**CN**-2005	0	2	3	0

Currently fashion companies focus upon more than one segment, and sometimes the definitions for Street, Casual, Evening and Sportswear lack clarity (Moriconi and George-Hoyau, 1998). Although this research aims to investigate fashion clothing product development in the broader sense, it asked designers for the core segment that they focused on. As can be seen in Table 4.33, the Casual wear market segment is the most popular one within the survey followed by Street wear and Evening wear. Only one designer, from China, currently works in the Sportswear segment.

Table 4.33 - Designers' Market Segment by Nationality

N=20	Target Market Segment			
	Street	Casual	Evening	Sports
Dsgn-**UK**-2005	2	3	1	0
Dsgn-**BR**-2005	2	6	1	0
Dsgn-**CN**-2005	1	3	0	1

When positioning designers in terms of their market environment, it was noted that Chinese interviewees tended to operate at local and national market levels while the majority of British designers worked with in multinational (2 or 3 nations) or global markets (more than 3 nations within different continents) as shown in Table 4.34. This fact is possibly a consequence of the UK integration within Europe and its interaction with North America as well as its prestige with in the creative fashion industry. Brazilian designers' operating environment shown in this survey presented greater diversity.

Table 4.34 - Designers' Environment by Nationality

N=20	Market Environment			
	Local	National	Multinational	Global
Dsgn-**UK**-2005	1	0	3	2
Dsgn-**BR**-2005	2	3	1	3
Dsgn-**CN**-2005	1	4	0	0

Another way to profile and compare designers is based on the number of garments they are able to put into the marketplace. Table 4.35 shows the scale of production for the companies in which the designers work. The figures show that the majority of the designers work in small and medium size companies. It is interesting to highlight that one designer from Brazil and two from China do not know anything about their production volume. They declared that this is not an issue for designers, they also said that the marketing department makes this kind of decision without any intervention or participation from the design team.

Table 4.35 - Designers' Size of Production by Nationality

N=20	Size of Production per Collection (in pieces)				
	Up to 500	From 500 to 5,000	From 5,000 to 50,000	50,000 or more	Not Known
Dsgn-**UK**-2005	4	2	0	0	0
Dsgn-**BR**-2005	1	4	1	2	1
Dsgn-**CN**-2005	1	0	1	1	2

Another parameter for comparison is the average price for the best-selling garment in their collections. Based on this kind of information, it is possible to map the economic power of their consumers. All prices were converted to British Pounds in order to facilitate the analysis. Table 4.36 shows that there was no mass-market designer interviewed in the UK, with the majority of them selling garments over 100 pounds. The majority of Brazilian and Chinese designers are positioned in the upper-middle market, with best-selling garments priced between 21 and 100 pounds.

Table 4.36 - Designers' Average Price by Nationality

N=20	Average Price of a Piece of Clothing		
	Up to £20	From £21 to £100	£101 or more
Dsgn-**UK**-2005	0	2	4
Dsgn-**BR**-2005	2	6	1
Dsgn-**CN**-2005	1	3	1

The designers were also classified by their approach to design development. Conceptual-led approaches mean that the designer's individual ideas are at the core of the development process of new products. Brand-led relates to a set of assertions of concept, market, and consumer identity combined as the essence of product development. Commercial-led is based on trends, sales and benchmarking, without a unique direction for the design process. Table 4.37 shows that in Brazil and China there is a mixture of approaches, whereas in the UK the approach is Conceptual-led.

Table 4.37 - Designers' Nature of the Design Development by Nationality

N=20	Nature of the Design Development		
	Conceptual-led	Brand-led	Commercial-led
Dsgn-**UK**-2005	4	2	0
Dsgn-**BR**-2005	2	4	3
Dsgn-**CN**-2005	1	2	2

In order to be able to measure the degree of control that these designers have over the decision-making process their positions with in the companies were noted. The majority of the designers in all countries have some kind of participation in the profits or ownership of the company (Table 4.38).

Table 4.38 - Designers' Position inside the Company by Nationality

N=20	Position inside the Company		
	Employee	Partner (stockholder)	Owner
Dsgn-**UK**-2005	0	1	5
Dsgn-**BR**-2005	1	2	6
Dsgn-**CN**-2005	2	1	2

This section shows some of the points gathered during the interviews with the designers, and a comparison between characterisation and practices of the three countries was developed. In the next sections, some particular data that seemed to be important to highlight are presented separately by nationality.

4.2.2 *British Designers*

The interviews with designers in the UK showed a very interesting finding. None of the interviewees have an English background. Even those born in the UK have non-English heritage. The roots are very diverse, from Iceland, Canada and United States to India, South Africa and China. The common point between them is a fashion educational background in the UK; either a first degree or a Master of Arts. This is an important finding in the light of the fact that British Fashion Education is well known throughout the world, with a position of considerable leadership. The designers declared that London is a good region to set up their business, due to its effervescence and press coverage, and the Southeast of England due to the proximity of the London metropolis and continental Europe.

In summary, British designers in the survey have a formal educational background in Arts and Humanities, are young in professional experience, have some ownership or decision-making voice within the company they work for and practice a Conceptual-led approach in their product development.

4.2.3 *Brazilian Designers*

The Brazilian designers come from at least two major different regions of Brazil: the southeast region and the northeast region. The southeast is more developed, European influenced and fashion concept-led, this consists of São Paulo and Rio de Janeiro; where as the northeast region, less developed, authentic blended Brazilian style and clothing, is production-led, with the interviewees based in Recife and Caruaru.

All southern Brazilian designers had a fashion education background, while the northern ones are struggling to update their knowledge in this specific area. Fashion courses in the southeast started 15 years ago and a fashion culture has sprung up as a consequence. In the northeast, the initiatives are still timid but an emergent interest and investment in fashion education can be noticed. Just one of the designers interviewed had studied abroad, in the Netherlands.

In the survey, Brazilian designers was the most experienced professional group, although they presented diversity in educational backgrounds, including Law and Management as a first degree. Their practices are more Brand-led than the ones from the UK and China.

4.2.4 Chinese Designers

The interviews with designers in China were carried out in Guangzhou and Shanghai cities. The southeast region of China, where Guangzhou is the major city, is characterised as the production region with the greatest number of mainland clothing factories. On the other hand, Shanghai is known as the 'Chinese style, Chinese city' because of its European influenced history and its capacity in arts and culture issues. The surprising finding in this field research was the fact that there is a flourishing generation of fashion designers, not entirely copying the European style, but rescuing what is essential in Chinese traditional culture and launching a new Chinese fashion concept harmonious with the 21st century.

None of the designers interviewed had studied abroad, although some of them have already travelled to Europe and North America and often visit foreign exhibitions and do trends research trips. In fact, it is important to stress that all designers have a fashion educational background, but certainly the curriculum is far from the European style of teaching in a creative field. In relation to their approach, the majority of Chinese designers' practices are Brand-led or Commercial-led.

4.2.5 Designer Comparison

The majority of the designers in the survey are focusing their development upon a small group of younger, independent, affluent consumers. This choice seems to be a consequence of their educational background. It is considered that to be dressed is a need for everybody and diverse groups of consumers should be considered in academic tasks.

The diversity of the designers' backgrounds and practices inside the sample is really worthy of note. In general, the British designers are more focused on conceptual items targeted for niche markets, while Brazilian and Chinese designers work towards considering commercial variables and bigger markets. These differences could be a reflection of the size of the countries' potential markets. The volume of production is another consequence of the size of the market.

When analysing the educational background of the designers, although the British and Chinese were all from Fashion or Arts and Humanities fields, it is possible to notice key differences between emphases in their curriculum and subsequently in their practices such as between creativity and rendering approaches.

A cultural difference noted during the interviews was that the British designers tried to answer strictly what was asked, the Brazilian designers answered questions expecting confirmation that they are doing well, and finally the Chinese designers often asked more about what they should be doing to improve their abilities.

With these cultural differences in mind, it is important to consider a model for designers' practices that can at the same time consider local singularities and global requirements by the targeted consumers. In this direction, it is most desirable that this research can offer to designers a kind of 'auto-check' tool as an outcome. Revising the Literature Review (Chapter 2), the Means-End Chain Model seems to have some sort of elements to guarantee this relationship with the design briefing and can possibly fit the designers' needs.

The first analysis of the design data survey was presented above. More analysis about design practices and the considerations will be presented in the following sections, with qualitative methods (Section 4.5) and quantitative methods (Section 4.8).

The following section will present the characterisation of the Company survey, firstly presenting the findings in general, followed by specific findings by nationality.

4.3   DISCUSSION OF COMPANY SURVEY FINDINGS

This research includes consideration of the companies' point of view, in order to suggest improvements of the product development process within the fashion clothing industry.

A survey of 20 fashion companies was carried out in the UK, Brazil and China based on interviews. Six interviews were completed in the UK in June and July 2005, nine in Brazil during July to September 2005 and five in China in November 2005. The researcher conducted all of the interviews, with translation support for the Chinese survey. Fashion clothing companies were invited to participate in the research based on their interest, diversity of their work, and availability. It was seen as important to include well-known fashion companies, brand-diffusion fashion companies and emerging fashion companies in each country survey. Size, market strategy, strategic group and product value parameters were used to classify the companies.

The following sections present the characterisation of the Company survey as well as introducing some comparisons between the different nationalities.

4.3.1 Company Survey Profile

Due to the diversity of the fashion market, companies were classified by their market segment. Casual-wear is the only segment that was represented in all countries in the survey (Table 4.39) possibly due to its flexibility.

Table 4.39 - Companies' Target Market Segment by Nationality

N=20	Target Market Segment						
	Street	Casual	Evening	Sports	Beach	Under	Work
Cmpn-UK-2005	2	1	1	1	0	1	0
Cmpn-BR-2005	0	5	1	1	1	0	1
Cmpn-CN-2005	1	2	0	0	0	0	2

The interviewees were asked about the size of their production and, surprisingly, three of them did not know the answer (Table 4.40). One of the British managers did not know because she was not responsible for this area, instead was involved in marketing/promotion. The other was the Brazilian interviewee, who worked in product development, and did not have access to production information due to company internal policy.

The figures relating to the volume of production are in ascending order, starting with the British companies, then the Brazilians, and finally the Chinese, showing a direct relation to the size of these nation's markets.

Table 4.40 - Companies' Size Production by Nationality

N=20	Number of Pieces Produced per Season					
	Up to 500	From 501 to 5,000	From 5,001 to 50,000	From 50,001 to 500,000	From 500,001 to 5,000,000	5,000,001 or more	Not Known
Cmpn-UK-2005	1	2	0	0	1	0	2
Cmpn-BR-2005	0	1	3	3	1	0	1
Cmpn-CN-2005	1	0	1	2	0	1	0

Knowing the number of employees is helpful in mapping the companies, although there is a global tendency within fashion clothing chains, especially in the last ten years, to outsource production in order to, mainly, cut labour costs. Half of the companies in the survey had 11 to 100 people in their direct workforce (Table 4.41), these would be categorised as small and medium enterprises (SMEs). The unexpected findings relates to the Chinese survey, which did not include any company that had more than 500 employees. Normally Chinese industry is directly related to big enterprises and huge labour work forces, although this profile fits better with clothing production companies than fashion product developers.

Table 4.41 - Companies' Number of Employees by Nationality

N=20	Number of Employees			
	Up to 10	From 11 to 100	From 101 to 500	501 or more
Cmpn-UK-2005	2	2	1	1
Cmpn-BR-2005	1	5	2	1
Cmpn-CN-2005	0	3	2	0

Information that can help further analysis relates to the longevity of the enterprises. The age of companies was ascertained and classified in a way to help assess the maturity of the decision-making process with in each firm. The majority of companies within the survey have at least eight years of experience in the market, seen in Table 4.42. The most diverse survey is the British example, which includes new companies and ones who have been in existence for nearly two decades. Possibly as a reflection of the emergence of the market, the Chinese companies are relatively the youngest.

Table 4.42 - Companies' Age by Nationality

N=20	Years of Company Existence			
	Up to 3	From 4 to 7	8 to 15	16 or more
Cmpn-UK-2005	2	0	1	3
Cmpn-BR-2005	1	1	4	3
Cmpn-CN-2005	1	1	3	0

Fashion has a tradition of being popular with women and especially so in the late 20th century, although there is evidence that the 21st century will see men rediscovering the interest and enjoyment of looking 'cool and trendy'. Men needed to give up their fashionable garments during the Industrial Revolution (18-19th centuries) and later during the two world wars. When women moved from the domestic space to compete with men for employment, they did not give up attention to their femininity. The survey attempted to interview companies that dedicated their production to only female consumers, only male consumers and some with both genders in mind, as shown in Table 4.43 below.

This sort of data can help to map the wider vision of the companies and what they envisage as changes in monitoring consumer behaviour, lifestyles and trends.

Table 4.43 - Companies' Product Target by Nationality

| N=20 | Product Target | | |
	Feminine	Masculine	Unisex
Cmpn-UK-2005	3	2	1
Cmpn-BR-2005	4	1	4
Cmpn-CN-2005	4	0	1

The average price of the bestselling garment was concentrated between 21 to 100 pounds. British companies tend to have the highest prices, Brazilian companies have the lowest average prices and the Chinese companies have the mid-range prices (Table 4.44). The Chinese findings are, possibly, a consequence of the recent emergence of upper middle class in what was officially a communist country.

Table 4.44 - Companies' Average Price by Nationality

| N=20 | Average Price of a Piece of Clothing | | |
	Up to £20	From £21 to £100	£101 or more
Cmpn-UK-2005	0	3	3
Cmpn-BR-2005	3	5	1
Cmpn-CN-2005	1	3	1

When questioned about their production, the vast majority of the companies declared that they have outsourced production or have a combination of internal and external production (Table 4.45). No companies in China showed internal only production, which shows that the tendency to outsource is true even in China, although some companies in the UK and Brazil still have in house production. On the other hand, all companies in the survey had their samples made internally, which guarantees the most precise product specification, processes and finishing during the product development process.

Table 4.45 - Companies' Source of Production by Nationality

N=20	Source of Production Manufacturing		
	In House	Outsourcing	Hybrid
Cmpn-UK-2005	1	4	1
Cmpn-BR-2005	3	5	1
Cmpn-CN-2005	0	2	3

The target environment of the companies varies according to the country where the company is based (Table 4.46). This information helps in mapping the awareness of the companies in the survey in relation to local and foreign markets. The British survey is spread over all categories, from local to global targets; the Brazilian survey did not show any company with multinational targets and the Chinese survey presented companies that were active either locally or globally.

Table 4.46 - Companies' Environment Target by Nationality

N=20	Environment Target			
	Local	National	Multinational	Global
Cmpn-UK-2005	1	1	3	1
Cmpn-BR-2005	3	4	0	2
Cmpn-CN-2005	4	0	0	1

In summary, the majority of the survey is composed of companies which target Casual wear segments and have an average of ten years experience. The survey comprises mainly of small and medium enterprises with price ranges of best selling pieces between 21 and 100 GBP.

The following sections present peculiarities identified within each country survey that can help in the further analysis, these include cultural differences and distinct strategy approaches.

4.3.2 *British Companies*

The UK fashion companies within the survey had a diverse profile: from small companies run by designers to luxury names and international investors. Only one of them does not have an exclusive retail space or a flagship store. During the field research, the interviewees demonstrated interest in answering and cooperating with the research, especially when some strategically delicate questions were posed. All the British companies can be classified as OBMs (Original Brand Manufacturer) according to Gereffi's theory (2002) of production systems, apart from one which has never had any internal production.

Although all companies claimed to be in good health, six months after the interview, one of the companies had closed down their shop and put the brand on stand by.

4.3.3   Brazilian Companies

The survey carried out in São Paulo, Rio de Janeiro and Recife showed a little of the diversity of Brazilian fashion companies. All of the companies have a relatively well-known brand name in their segment, varying from the local/regional market to international stockists such as Galleries Laffayete in Paris. Three of the nine companies interviewed do not have an exclusive retail space or a flagship store, and their penetration of the extensive Brazilian market varies. Some of the brands launched their collections at São Paulo or Rio Fashion Weeks (even though they are not based in these cities), while there are others that do not have a collection in the proper sense, designing pieces without concept planning or sales reports. Most of them are currently changing their status from OEM (Original Equipment Manufacturer) to OBM (Original Brand Manufacturer), according to Gereffi (2002).

The companies within the survey are in diverse states of maturity, but all confirmed they are currently increasing their market share. As an emergent economy, Brazil has recently increased the purchase power of its population, and fashion goods have become the 'must have' for a wide part of the market.

Some initiatives with private and government support have arisen in the last ten years, and a strategic report recommended special focus on Beach and Fitness wear, allied with the tropical weather, the natural beauty of Brazilians and the creativity of its designers. Considering this trend, it is important to highlight that one of the companies interviewed works mainly in these two segments, has a great penetration in the national wide market and also has some foreign clients.

4.3.4   Chinese Companies

The field research in China revealed an interesting finding: the Chinese are curious to learn everything that they can about the West. Several interviews were carried out not only with the person in charge, but also with an audience of staff or co-workers. The diversity of market strategies is something to be highlighted in Chinese companies. The OEM (Original Equipment Manufacturer) production system, classified by Gereffi (2002), appeared often, with a company supplying products to Wal-Mart (United States) and the Celio (France). Companies have shown, however, a willingness to move to the OBM system (Original Brand Manufacturer) and are investing in design.

Only one of the companies complained about the market and commented on its decadence. From a luxury Shanghainese brand to one from Beijing focusing on corporate and government white collar workers, all of them intending to increase their international market share. The most interesting case is related to investment in IT, in order to allow the company with the means to offer products from mass customised suits to perfect-made copies of a branded garment.

As the Chinese economy is growing and a significant stake in businesses is owned by the government, a segment in full expansion is the Work wear. Two of the companies interviewed in China target professional and white collar consumers, men and women, not only in corporate uniform, but also with the inclusion of Western fashion trends in suits and formal clothing.

4.3.5 Company Comparison

The companies, within the three targeted countries demonstrated some relevant differences. The most highlighted difference is related to the price of the garments. The prices charged to their clients by British companies appear to be higher than those by Brazilian and Chinese firms. This finding corroborates with the Big Mac Index and the Purchase Power Parity showed in Section 4.1.4.

A second point to stress is the sales environment targeted by the companies. Brazilian and Chinese companies focused more on internal markets, while the British targeted other markets, especially continental Europe, Japan, North America and the Middle East. On the other hand, a growing tendency was noticed within Brazilian and Chinese industries to attempt to conquer foreign markets, although their internal market and consumption power can stimulate increased volume of sales.

Although the vast majority of the interviewees demonstrated enjoyment in reflecting on their practices, strategies and competitiveness, they avoided talking about numbers and profits. As the fashion industry is one of the most competitive in the world, this behaviour is understandable, as is restriction on information regarding product launches and future strategies.

The researcher had the feeling that the British managers tried to demonstrate that they were very busy and could not spend much time on the interview. On the other hand, the Chinese managers even though they were busy, cancelled meetings for the interview and felt proud to be chosen. In Brazil, the interviews were more relaxed, and despite the language facility of the researcher, sometimes the answers were so complex that the interview lasted more than one day.

A few managers exhibited some ignorance in relation to the volume of production of their companies, which indirectly can result in a lack of knowledge of their market share. In the same way, the majority of companies seemed to target the same consumer profile, which indicates the necessity to investigate more about consumer preferences and restraints in relation to fashion clothing consumption.

Possibly, a model for product development that transcends existing designer practices and one which can be linked with management practices could be a useful one. The Means-End Chain Model (presented at Chapter 2) embodies a self-checking tool allowing analysis of the attribute, its consequence and its value for the consumer.

Following this description of the analysis of the companies, further analysis with qualitative and quantitative methods will be carried out in Sections 4.6 and 4.10, respectively.

The following sections will introduce the qualitative methods used in this research, firstly with consumers (Section 4.4), secondly with designers (Section 4.5) and lastly with companies (Section 4.6).

4.4 CONSUMER QUALITATIVE ANALYSIS

This section presents all the consumer qualitative analysis carried out within the field research in the UK, China and Brazil. The first subsection (4.4.1) is dedicated to consumer analysis from the UK which led to the creation of 10 additional *Indicators for Fashion and Clothing Consumption* in relation to previous work in Brazil (Rocha, 1999). The second and third subsections (4.4.2) and (4.4.3) show the analysis of consumers' favourite pieces of clothing and emotional design issues (Norman, 2004), respectively.

From this point on, the consumer analysis compares the British, Brazilian and Chinese preferences and restrictions, and when appropriate, suggests blended insights.

As qualitative methods were used and open questions were posed, due to space constraints, only a selection of main results were chosen to illustrate the analysis.

4.4.1 Content Analysis – New Indicators

Research with open questions has some limitations as regards to the level of interviewee response. Therefore content analysis was carried out only with valid responses within the sample and important comments of the respondents were selected.

Consumers were asked about their favourite piece of clothing and to reflect on the reason for their choice (two open questions of what and why). Another question posed to consumers was to consider anything relevant to them that had not been included in the questionnaire.

The first survey was in the United Kingdom, which provided significant input into the management of the subsequent surveys in Brazil and China. Some of the consumers' observations collected during the first use of the questionnaire were transformed into new *Indicators for Fashion and Clothing Consumption* due to their pertinence. Some were added for the Brazilian and Chinese surveys, and others were analysed as problems that the fashion industry should take into account, not specifically in relation to product design concept and development, but to target strategy.

As this research is aligned with an approach from consumers and towards consumers, *Indicators for Fashion and Clothing Consumption* were added from the spontaneous comments made by British consumers.

As explained before, this research began by measuring the same 28 indicators used in Rocha (1999). During the process of piloting and testing the consumer questionnaires, two points were identified as necessary: gender and exclusivity.

Possibly these indicators didn't become apparent in Rocha's study (1999) due to cultural differences between Brazilian and British societies. Although Brazil is labelled as a Latin country, where macho culture is one of the characteristics, a lot of changes have been happening in recent years, and equality between genders has increased. Specifically in relation to dress and gender, there is no more 'pink for girls and blue for boys' in Brazilian parents' minds; the uniforms in public schools are the same for both genders (shirts and trousers, no more dresses or skirts for girls, no ties for boys either). Also, advertising and soap operas, when exploring sex appeal, show a balanced set of images of half naked men and women. Recent demographic reports show that the proportion of women at university is higher then men, although their salaries in the market place are still lower than men.

In the UK, it is easy to find girls in pink along the streets (maybe a Barbie doll influence) and clothes seem to be more 'gendered' than in Brazil. Part of this, possibly is due to the British effort to integrate all groups of society, including ethnic and religious minorities.

Considering this issue and the comments from the consumers who answered the pilot questionnaire, the gender issue was split into two different categories: *Same Gender*, when the consumer recognizes his/herself with a social gender; and *Opposite Gender*, when the attraction or repulsion of the opposite gender is an issue to be considered when getting dressed.

The last indicator added during the pilot questionnaire for British consumers related to *Exclusivity*. Spontaneously, some consumers expressed their worries with finding someone dressing the same as them. Culturally in Brazil, apart from the high society addicted to fashion items, to be similarly dressed sometimes indicates good taste and synergy of ideas. Possibly in 1999, when Rocha's study was carried out, the influence of fashion brands and celebrity culture were weak or not a priority for consumers. On the other hand, the UK is widely known as a country of freedom of thoughts and self expression. These characteristics corroborate with the comments of British consumers in hating to find someone dressed in the same way as them, in this research it is known as the *Exclusivity* indicator.

Some qualitative analysis results for British consumers carried out within the sample resulted in several new *Indicators for Fashion and Clothing Consumption* that are presented in Table 4.47 below, with selected comments from consumers:

Table 4.47 – Selected British Consumer Comments

Consumer Comments	Indicators
'I guess being in relationships with boys may matter to girls (and they) take care about fashion.'	Opposite Gender*
'Knee length brown skirt - kicks out at hem - makes me look slim + I feel feminine + sexy in it.'	Same Gender*
'I buy individual items to stand out from the crowd.'	Exclusivity*
'My clothing choices are influenced by my faith or religion.'	Beliefs**
'My prom dress. I designed it and had it made in Nepal where I come from.'	Racial Roots**
'If I am unhappy with my clothes I will change them until I am.'	Mood**
'Famous people's clothes affect your choice of clothing'	Celebrity Influence**
'Do you wear clothes according to the seasons?'	Seasonality**
'If there's a choice I would prefer to buy ethically made clothes.'	Ideology**
'I judge other people by what they wear.'	Image Judgement**

Notes: * Added during testing UK-2004 and measured into UK-2004, BR-2004 and CN-2004
** Added after the UK-2004 consumer survey and measured into BR-2004 and CN-2004

Some of the comments from the British sample that were considered important due to the global focus of this research, and measured in the Brazilian and Chinese samples are: *Beliefs* (related with religion, although 90% of Brazilians are Christians and this information is not available for Chinese society); *Racial Roots* (growing in importance due to the threat of standardisation via globalisation); *Mood* (very important in mature markets, when the basic needs are already satisfied); *Celebrity Influence* (a important phenomena in post-modern societies); *Seasonality* (issue important in temperate climates, where four distinct season occur); *Ideology* (the consideration of dress style as a message) and *Image Judgement* (a 'Big Brother' consequence in the way people wear).

The figures related to these indicators will be presented in Section 4.10.2, which is dedicated to quali-quantitative methods, as these issues were measured by the degree of importance the consumers gave to each statement.

Before describing this analysis, the following sections will present the results of the content analysis carried out with the consumers from the three countries in the study. The focus is on the attempt to investigate the spontaneous worries of consumers in relation to fashion clothing issues.

The next section presents a content analysis carried out with the consumers' comments for their most popular favourite piece of clothing based on the Emotional Design theory developed by Norman (2004).

4.4.2 Content Analysis - Emotional Design

An interesting theory that seemed to be relevant to fashion clothing products is the Emotional Design concept, developed by Norman (2004). The concept is based on the symbolic and emotional attractiveness products can have, enhancing the designer's consideration of these elements when developing products. According to Norman (2004), form and function are no longer enough to satisfy consumer needs.

In order to investigate how Norman's Emotional Design theory (2004) can be applied to fashion products, a qualitative investigation was conducted based on the favourite item of clothing as stated by the consumers.

As an unexpected result, the majority of consumers from all three national groups spontaneously quoted their pair of jeans as being their favourite piece of clothing. Although jeans nowadays are a global icon, the different cultural and social meanings attached to this product type are an interesting point of analysis. According to Vontris and Vontri (2004), fit, design and style are the three requirements most common in need for local adaptation.

Denim is a fabric made of cotton, a natural fibre that provides comfort and durability, and which moulds and shapes the body. A pair of jeans is easily linked to youthful appearance and youth culture. Another important aspect to highlight is the unisex character of this garment, men and women can wear it equally well. Moreover, the pair of jeans, although a Western-branded product nowadays has Eastern markets, China especially is a potential growth market for jeans companies (Wu and Delong, 2006).

In order to clarify the analysis, an exploratory study was carried out about the Norman (2004) Emotional Design theoretical framework in relation to clothes. The main characteristics of the *Visceral*, *Behavioural* and *Reflective* dimensions discussed in Section 2.2.5.2 of the Literature Review Chapter are repeated in Table 4.48.

Table 4.48 – Explanatory Keywords for Fashion Clothing Consumption by Norman Emotional Design Theory

	Visceral	Behavioural	Reflective
Keywords	Instinctive preferences	Functionality, Performance	Subjective meaning of product
How...	it looks	it works	it means

Visceral characteristics are how the consumer perceives his/her image/body in relation to the product; *Behavioural* characteristics are how the product performs in terms of functionality and *Reflective* characteristics are how consumers place personal meaning and values on their products. These three emotional characteristics have been used to analyse the cultural similarities and differences between UK, Brazilian and Chinese consumers.

Table 4.49 presents the selected comments made by consumers who elected a pair of jeans as their favourite item of clothing analysed via Emotional Design theory.

Table 4.49 – Content Analysis for a Pair of Jeans as Consumers' Favourite Clothing by Nationality

			Think about your favourite item of clothing. Why is it your favourite?
UK	Visceral	n87	'Jeans - tight, they are casual, cool and can be sexy.'
	Behavioural	n221	'Jeans because they are comfortable and practical.'
	Reflective	n156	'My jeans with coloured stitching because they have coloured stitching!'
BR	Visceral	n227	'Black or jeans trousers. Can combine with a variety of different tops and colours.'
	Behavioural	n187	'Jeans. Practical, protects my legs and it's easy to combine with other items.'
	Reflective	n190	'Jeans. Makes me feel more welfare and younger.'
CN	Visceral	n7	'I prefer bright and colourful garments because I want everybody to notice me.'
	Behavioural	n77	'I love jeans because they can be formal and casual. Especially, in both ways they can be comfortable too.'
	Reflective	n40	'First of all, the clothing should be from a well-known brand. Secondly, the style and colour needs to work well with the design.'

Note: n# is the numbered reference for a specific consumer questionnaire

The *Visceral* analysis could be described by a British consumer (n87) as cool and sexy added value, by a Brazilian (n227) as its visual flexibility in matching with tops and by a Chinese consumer (n7) as the visual impact of the clothing.

Consumers talked about functional attributes inside the *Behavioural* dimension. A British consumer (n221) highlighted comfort and practicality, a Brazilian (n187) added the protection function for a pair of jeans and a Chinese consumer (n77) commented on its versatility.

The *Reflective* dimension was explained by the exclusivity meaning of the clothing (n156 - UK), the capacity of the jeans to offer well-being and a younger appearance (n190 - BR) and the assurance that a well-known brand can offer value to a consumer (n40 - CN).

Analysing the respondents' answers and the frequency of the opinions by the nationality of the consumers, it is possible to suggest that British consumers consider *Behavioural* and *Reflective* dimensions as the most important. *Visceral* and *Reflective* are more important dimensions for Brazilian consumers and *Visceral* and *Behavioural* are the most significant for Chinese nationals (Table 4.50).

Table 4.50 – Emotional Design Dimensions Relevance by Nationality

	Visceral	Behavioural	Reflective
British Consumers	Less	More	More
Brazilian Consumers	More	Less	More
Chinese Consumers	More	More	Less

The decline in awareness of the *Visceral* dimension within British society is possibly an indicator of the feeling of exclusion for those who are keen to aspire to the slim standard of beauty. The relatively low importance given by Brazilians to the *Behavioural* dimension can be explained, possibly, by the cultural aspects of this Latin society, based more on visual appeal than the functional issues. The recent increased emphasis upon individuality in China could be linked to the low level for the *Reflective* dimension.

The analysis revealed that while British consumers are more likely to choose fashion products that satisfy their personal emotional needs, Brazilian consumers choose products that have higher socio-emotional appeal. Chinese consumers, on the other hand, are more likely to choose function-emotional messages. The coincidental findings between the target nationalities should be considered as important for product development in a global market. The noteworthy results are crucial to greater responsiveness to local consumers. The goal is to develop a design methodology to assist strategic product planning for the fashion clothing industry.

As the Emotional Design theory results seemed not to easily encompass and explain the phenomena of consumption preferences in fashion clothing and being highly dependent upon subjective interpretations, it seems to be extremely useful to continue the investigation of consumer behaviour for fashion clothing products.

In order to discuss the meaning of the results, further qualitative analysis was undertaken, using the content of the consumers' responses. The next section presents some in-depth analysis about a popular favourite piece of clothing noted by a large number of consumers.

4.4.3 Content Analysis – Favourite Piece

The concept of favourite is related to a preference above all others and means something regarded with special favour or liking. As a complex construct, it can be explained, but not entirely, by identity, comfort, emotion, usability, tangible and intangible factors, and so on. The choice of a favourite piece of clothing is something to be seriously considered as an example of emotionality, as it has already been tested, bought (but not always) and worn by the consumer.

In this type of research design it is not expected that all questionnaires received will be fully completed, especially the open-ended questions. A content analysis was used within the sample and some quotes and assertions of the respondents were selected for investigation.

Table 4.51 presents selected written comments of the consumers about their favourite item of clothing within the three targeted countries.

Table 4.51 – Content Analysis for Consumers' Favourite Clothing by Nationality

		Think about your favourite item of clothing. Why is it your favourite?
UK	n9	'If I am unhappy with my clothes I will change them until I become happy. My favourite one is a stunning evening dress, it makes me feel special.'
	n37	'Dressing style is an expression of your inner self. I love my baggy pink trousers, they're loud, very pink and elaborately decorated, an expression of myself, they epitomize everything I am.'
	n99	'A denim skirt that I made myself from a pair of jeans because it is unique.'
BR	n43	'Fashion and exclusivity for the high class society. I love trousers, I can wear them in a several ways just changing the top.'
	n81	'Clothing needs to have quality, be comfortable, out of the fast fashion and not so expensive.'
	n141	'I used to search for clothing according to my age. I have a red dress that makes me feel well dressed and people used to tell me that it fits well.'
CN	n25	'A garment made of cotton! Because it is comfortable and healthy for the body, also good for environmental protection.'
	n86	'My favourite clothing should be made of a comfortable material with a suitable colour, and also fit my body properly.'
	n221	'Casual clothing such as a jacket. It makes me feel more relaxed, comfortable, youthful and full of energy.'

Note: n# is the numbered reference for a specific consumer questionnaire

The selected British consumers talked about their individual concerns, from *Mood* (n9), *Taste* (n37) to *Be Noticed* (n99), if using the *Indicators for Fashion and Clothing Consumption* in the analysis.

Brazilian consumer comments related to the social context: *Fashion* (n43 and n81) *Exclusivity* and *Versatility* (n43), *Quality* (n81) and *Age Appearance* (n141).

Physical awareness such as *Comfort* (n25, n86 and n221), *Health* (n25) and *Balance-Fit* (n86) were the common important elements for Chinese consumers.

Based on the survey results and theoretical comparative literature review, it is possible to affirm that while British consumers tend to prefer fashion clothing products in an individual context, Brazilian consumers are inclined to prefer a social connection. On the other hand, Chinese consumers prefer clothes with functional qualities.

The open questions about the consumers favourite piece of clothing were analysed and linked with the *Indicators for Fashion and Clothing Consumption*. A clear segmentation of the *Indicators* suggested that three main areas of awareness arose from the national group of consumers: individual lineage, social lineage and physical lineage.

For instance, the cultural differences of the national groups, allied with their market stage, from emergent to mature, and the influence of local and global issues, suggests that these variables can guide their awareness in relation to fashion clothing consumption.

As the favourite analysis is one of the proposed tasks of the investigation, which aimed to analyse the spontaneity of consumers' preferences, it is appropriate to discuss further analysis.

Before changing the method for analysing consumer data, some qualitative analysis was carried out within the designer and company surveys. The next section presents the investigation carried out with the designers, followed by one completed with the managers.

4.5   DESIGNER QUALITATIVE ANALYSIS

This section introduces the qualitative analysis of the designers' interviews. The first section (4.5.1) is related to their view of consumers, followed by their current practices and skills (section 4.5.2), both using a content analysis technique. The designers were not distinguished by nationality in this part of the analysis.

4.5.1   *Content Analysis – Designer's Consumer Issues*

The first open question on the questionnaire related to the way designers begin their collection development. As can be seen from Table 4.52, only 10% of the designers use market information as a starting point for a collection (n13 and n14) and only 15% of them include market factors within a combined starting point for product development (n3; n18 and n19). The market starting point is related to the consumers, the user, the reason for the existence of the design (Cooper and Press, 1995). The remaining designers have their starting points relating to totally subjective dimensions, inspiration, which means they design for themselves; or a brand-led (often unreal) concept, a statement or idea that should be followed as the priority for the design process.

The results also arose from the fact that 45% of the designers within the survey have no practices relating to any kind of consumer research when product developing. However, the majority of the designers focused their development towards a small group of young, affluent, independent consumers. This choice is possibly a consequence of their educational backgrounds and the type of projects undertaken in universities while gaining their qualifications.

Table 4.52 - The Collection Starting Point and the Consumer Profile of the Designer Survey

	Starting Point	Consumer Research	Consumer Profile
n1	Concept	No	'Models and fashion people.'
n2	Concept	No	'25-35employed, active, professional, affluent, proactive women.'
n3	All	Yes	'Educated people, 20-35, fashion followers.'
n4	Inspiration	No	'Young women, aesthetic addicts, well informed, active, affluent, criteria-led.'
n5	Inspiration	No	'Innovative attitude, critical thinking, cultural related, form 15 to grey haired.'
n6	Inspiration	Yes	'Delicate and sensible people, high cultural level.'
n7	Inspiration	Yes	'Art & design related people, aesthetics addicts, 30-35, not skinny.'
n8	Inspiration	Yes	'Young men 15-35, cool and active.'
n9	Inspiration	Yes	'Quite affluent women, stands out, 17-39.'
n10	Inspiration	No	'Fashion conscious people, 18-40, affluent, daring individuals.'
n11	Concept	Yes	'Urban women, design related, affluent, 20-50.'
n12	Inspiration	No	'Women 25-35, A class, professional, love to be dressed up.'
n13	Market	Yes	'Trendy people, energetic and active.'
n14	Market	Yes	'Middle class, low income, over 30.'
n15	Inspiration	Yes	'Art & design related people.'
n16	Inspiration	Yes	'Highly educated, active, traveller, informed, affluent, around 30.'
n17	Concept	No	'Like me, simple and emotional.'
n18	All	No	'Women 25-40; arts & design admirers.'
n19	All	Yes	'Culture-led active women, 28-35, educated.'
n20	Concept	No	'Innovative attitude, 27-40.'

Note: n# is the numbered reference for a specific designer questionnaire

4.5.2   Content Analysis – Practices and Skills

Another interesting point to highlight is that when designers were asked what they consider to be their strongest skill, the majority seemed to consider it to be related to their technical knowledge or creative-artistic side (Table 4.53). One designer mentioned his/her ability with sales (n14) and another with product management (n13). None of the designers mentioned their ability to understand and satisfy consumer needs or expectations.

When asked about which skill they think should be improved, atypically, one designer mentioned a personal confidence issue (n6). The designers, in general, demonstrated considerable innocence about the real business environment and were conscious of their lack of knowledge in terms of competitiveness, marketing and business skills. For example, only 55% of the designers were aware of their competitors and none stated their worries about the lack of the knowledge regarding target consumers.

200

Table 4.53 - The Strongest Skill and the Skill To Be Improved in the Designers' Opinion

	Strongest Skill	Skill To Be Improved	Competition Awareness
n1	'Concept'	'Business skills'	yes
n2	'Pattern cutting'	'Public, communication skills'	yes
n3	'Product plan and strategy'	'Patterning cutting'	yes
n4	'Creative ability, the whole process ability'	'Technical information, a higher degree'	no
n5	'The whole process ability'	'Leadership, share and trust responsibility'	no
n6	'Everything I do quite well'	'A better mother'	no
n7	'Pattern cutting'	'Sew better, patience, money and business deal'	no
n8	'Drawing, stylist, image production'	'Business skills'	yes
n9	'Pattern cutting, 3D design process'	'Marketing'	yes
n10	'Pattern cutting and creativity'	'Marketing and business skills'	yes
n11	'Speed, determination, imagination'	'Management and commercial skills'	no
n12	'Creativity, search for perfection'	'Patience, concentration'	no
n13	'Product plan and management'	'Brand and design strategy'	yes
n14	'Sales convince ability'	'Hand drawing skills'	yes
n15	'Creative ability, the whole process ability'	'Finishing skills and brand management'	yes
n16	'Patience and persistence '	'Management, business'	no
n17	'Creativity'	'Values and deep philosophy'	no
n18	'Logical thinking, practical skills'	'Promotion & marketing'	yes
n19	'Whole fashion chain knowledge'	'Details, more accuracy, time management'	yes
n20	'Never give up, idealist'	'Communication skills, shyness'	no

Note: n# is the numbered reference for a specific designer questionnaire

The findings indicate weaknesses in fashion designers' knowledge, skills and competences to manage the core design processes for contemporary collections, in order to meet the needs of cultural diversity and consumer demands.

The results also suggest that there is a real need for systematisation of the product development process, a checklist or some kind of guidance that can help designers in their practices and approximate them to the consumers.

The next section introduces the qualitative analysis conducted and the data gathered from interviews with company managers in the three targeted countries.

4.6   COMPANY QUALITATIVE ANALYSIS

This section introduces the qualitative analysis of the data collected from company managers in interviews. The first subsection discusses the investigation within the distinctive competencies (4.6.1) which targets the strategy and competitiveness techniques of the companies, followed by the company's view of their targeted consumers (Section 4.6.2).

4.6.1 Content Analysis – Distinctive Competencies

Following the advice of Hill and Jones (2004) presented in Section 2.2.8 of Chapter 2, companies that pursue competitive advantage need to have superior distinctive competencies. Managers were asked about their companies' strengths as can be seen in Table 4.54 below. Within 20 fashion companies, only seven mentioned anything relating to product development as their strong characteristic. This result suggests that companies, even though they are working within the fashion business, do not consider product development or design process as strategic strengths.

Moreover, when managers were asked about the areas of improvement their companies envisage, only six companies included anything about product development. More interesting is the fact that none of the seven companies which declared they have design as a strength, mentioned any product development stage as a requirement for improvement, which means that these companies are satisfied with the engagement they have with the design processes.

The balance is that, from 20 companies, seven considered their design practices adequate, six companies understood the need to improve their strengths within design and seven totally ignored product development issues when discussing superior competencies.

Table 4.54 - The Companies Strengths and the Areas of Improvement in the Managers' Opinion

	Strengths	Areas of Improvement
n1	'Infrastructure, machinery, staff'	'Design, style, visual merchandising'
n2	'Freedom to create, belief in intuition'	'Logistic, distribution, stockists'
n3	'Fresh ideas, the amaze factor'	'Management, Logistic, distribution, stockists'
n4	'Quality, pattern cutting, network'	'Design and style'
n5	'Honesty, growing company, good environment'	'Communication skills'
n6	'Not limit for creation'	'Image, planning, schedule, costs'
n7	'High quality product and extended services'	'Production, machinery, pattern cutting'
n8	'Product innovation'	'Market strategy, management team'
n9	'Financial health'	'Product quality, design, colours, style'
n10	'Brand strategy'	'Market, design, research'
n11	'Network'	'Product development'
n12	'Design, forward thinking, flexibility'	'Public perception'
n13	'Business knowledge, visibility, strong leadership, corporate responsibility'	'Speed action to market, independent in mind'
n14	'Quality, brand, price'	'Human resources'
n15	'Teamwork, consistent design, business plan'	'Commercial, exportation, stockists'
n16	'Good reputation, broad perception, innovative'	'Retail, PR, finances, design, production'
n17	'Honesty vision'	'Expand market, licensing'
n18	'Good teamwork, design'	'Management and communication skills'
n19	'Teamwork, suppliers'	'Limited resources'
n20	'Customisation, good service, excellence on fit'	'Production, technology'

In order to self-evaluate, companies were asked to rank on a seven point Likert scale, the degree of importance they gave to distinctive competencies described by Hill and Jones (2004): *Innovation, Quality, Customer Responsiveness* and *Efficiency*. The results based on means (Table 4.56), and analysed by nationality, indicate that *Consumer Responsiveness* and *Efficiency* are the lowest values and *Quality* is the highest. It is suggested that companies need to become more attuned to consumers' expectations. *Innovation* was highly ranked by British and Chinese companies. *Quality* was the competence ranked highest by Brazilian managers.

It is important to stress that the means were significantly lower within Brazilian and Chinese companies than the British companies, possible as a consequence of the differences between mature and emergent markets.

Table 4.56 – Distinctive Competences by Grade of Importance Means within the British, Brazilian and Chinese Companies' Surveys

Cmpn-UK-2005 N=6	Mean	Cpmn-BR-2005 N=9	Mean	Cpmn-CN-2005 N=5	Mean
Innovation	6.60	Quality	6.44	Innovation	5.00
Quality	6.40	Innovation	4.78	Quality	4.60
Customer responsiveness	6.00	Efficiency	4.44	Customer responsiveness	4.20
Efficiency	5.40	Customer responsiveness	3.89	Efficiency	3.80

Moving from what the companies think about themselves, their practices, their strategies and their markets, a further analysis about what the companies think their consumers seek in a fashion clothing product seems to be necessary.

4.6.2   Content Analysis – Company's Consumer Issues

Moving to the consumer issue, managers were asked about the target groups focused upon by the company. The majority of the companies targeted the young, affluent, slim, active consumer. Within the 20 companies, two of them mentioned a consumer aged 40 years old and two other companies considered a consumer aged over 60.

The affluent and the middle classes are part of the profile of the majority of the companies, with only one stating that its target is a low-income consumer (Table 4.55). Some of the 'personas' described by the managers seemed to be out of a celebrity chat show, and far removed from the real world and a commitment to inclusivity.

On the other hand, the companies, independent of the country of origin or the national targeted market, emphasise the same consumer profile, generating intense competition inside a 'small market' if compared with the size and diversity of the whole market, where the majority are excluded.

Table 4.55 - The Consumer Profile of the Company Survey

	Consumer Profile
n1	'Mature women, married, executive, elegant'
n2	'Educated and successful people, creative, affluent, 25-40 aged'
n3	'Affluent men, 25-45 aged, creative people'
n4	'Women over 30, high middle class, body shape diverse'
n5	'Both gender, 18-45 aged, affluent'
n6	'Young, 15-30 aged, wealth parents'
n7	'Executive women, around 40aged, wealth, divorced, beautiful and well treated'
n8	'25-40 aged, middle class women'
n9	'Young look women, middle class, active'
n10	'Office lady, around 30 aged, good income, innovative, brave'
n11	'25-40 years old, dynamic'
n12	'Independent minded, self-secure, women 15-65 aged '
n13	'Young men, 15-27 aged'
n14	'Young, both gender, around 18 aged, student, sport lover, low income'
n15	'Fitted women 19-35 aged, quality, comfort and exclusivity demander'
n16	'Young music lover, relationship free, 20-30 aged, fashion aware'
n17	'Could be anyone but wealth '
n18	'Affluent women, 25-60 aged, easy to find in big capitals'
n19	'Fashion aware people, middle class'
n20	'25-45 aged, half salary spent on garments, body shape not good'

Moving forward in an attempt to build a model for product development that can satisfy consumers as well as designers and companies from the fashion industry, some analysis was carried out using more sophisticated methods within a quantitative approach. The next sections, although aiming to complement the previous qualitative discussion, introduces a different perspective in analysing the issue for consumers (Section 4.7), designers (Section 4.8) and companies (Section 4.9), presenting the results achieved and discussions about statistical interpretations.

4.7 CONSUMER QUANTITATIVE ANALYSIS

Another investigative line planned for this research is quantitative analysis using advanced inferential statistics where appropriate. This section is divided into four subsections where the correlations between consumer variables are first investigated and when appropriated are analysed, initially discussing each nationality and later comparing them. In the first subsection (4.7.1) an analysis of the Recognition of Need is presented, followed by the Human Needs subsection (4.7.2), the Motivation for Dress is the third subsection (4.7.3), another subsection using Pleasurability as the core aspect of analysis (4.7.4) and finally a subsection that summarizes and compares all the theories used in the analysis (4.7.5).

The selected analysis carried out follows key theories presented in the Literature Review (Chapter 2) which is considered appropriate to extend the investigation within this research issue. The use of the *Indicators for Fashion and Clothing Consumption* persists, in order to make them the link between the qualitative and quantitative analysis.

4.7.1 *Recognition of Need*

The first analysis is based on the Blackwell et al. (2002) categories of *Need Recognition*. As presented in the Literature Review Chapter (Section 2.2.3), *Need Recognition* is the first of the steps for Consumer Decision-Making Process Model and the one that this research considers as key for product development. The Consumer Decision-Making Process is influenced and shaped by many factors and determinants. The analysis was based on the classification of the *Indicators for Fashion and Clothing Consumption* into Blackwell et al.'s categories: *Environmental Influences, Psychological Processes* and *Individual Differences*. The attempt is to find a connection between the *Indicators for Fashion and Clothing Consumption* and the categories of *Need Recognition*.

The *Environmental Influences* relate to the environment in which the consumer lives that may modify their choices, such as culture, social class, and family. The *Psychological Processes* is the category that can better explain the dynamic nature of consumer choice behaviour by noting their information, learning and behaviour changes. Later, *Individual Differences* is the level where attitudes, motivation, personality and lifestyle may influence consumer choice. The results are shown in Table 4.57:

Table 4.57 – Indicators for Fashion and Clothing Consumption by Categories of Need
Recognition according to Blackwell et al. Theory (2002)

ENVIRONMENTAL INFLUENCES	Beauty
	Brand
	Celebrity Influence*
	Climate
	Ease-of-Care
	Elegance
	Fashion
	Image Judgement*
	Moral Conventions
	Profession
	Functionality
	Seasonality*
	Versatility
PSYCHOLOGICAL PROCESSES	Boldness
	Be Noticed
	Exclusivity
	Ideology*
	Mood*
	Opposite Gender
	Personal Style
	Quality
	Same Gender
	Sensuality
INDIVIDUAL DIFFERENCES	Age Appearance
	Attraction To Particular Clothes
	Balance-Fit
	Body Exposure
	Physical Adequacy
	Colour
	Comfort
	Durability
	Racial Roots*
	Fabric
	Health
	Price
	Beliefs*
	Taste
	Welfare

*Brazilian and Chinese survey only

The following stage of the analysis was to run the statistical test in order to find out which *Indicators for Fashion and Clothing Consumption* had a significant relationship with the consumers' profile variables, presented in Section 3.5.2.1 as independent variables.

The procedures carried out with SPSS consider that when both the *Indicators for Fashion and Clothing Consumption* and the *Consumer Variables* (Gender, Religion, Ethnicity, Education, Income, Age, Height, Weight, Body Mass and Body Shape) were ordinal, the gamma test was applied, and where the consumer variable is nominal, Mann-Whitney and Kruskal-Wallis tests were used. The results are presented in the next sections by nationality.

4.7.1.1 *British Consumers*

The cross tabs with the UK-2004 database indicated numerous relationships between *Gender*, *Age*, *Body Mass* and the *Indicators* for consumption of a fashion clothing product (Table 4.58). These findings meant that for British consumers the reasons for choosing clothing varies, most importantly with 15 relationships, by the *Gender* of consumers. Secondly, with 13 occurrences, the *Indicators for Fashion and Clothing Consumption* varies based on the *Age* of the consumer. *Body Mass*, the volumetric of the body, is the third most important influencing factor, with 11 relationships.

In relation to *Gender*, female consumers presented more awareness of the majority of the *Indicators* with significant relationships shown in orange. On the other hand, *Exclusivity*, *Comfort* and *Brand* are more important for male consumers which suggest specific demands for men relating to fashion clothing products.

For younger consumers, *Brand*, *Be Noticed*, *Opposite Gender*, *Personal Style*, *Same Gender*, *Sensuality* and *Durability* are more important, which indicates the influence of others in their image. For older consumers, *Climate*, *Functionality*, *Exclusivity*, *Comfort*, *Fabric* and *Price* are the priorities, the majority of them related to the user experience.

When analysing the extent of *Body Mass*, corpulent respondents are more aware of *Ease-of-Care*, *Exclusivity*, *Colour* and *Comfort*. The remaining significant relationships such as *Fashion*, *Be Noticed*, *Personal Style*, *Sensuality*, among others, are more important to slim consumers. Again, the results show a clear distinction between opposite consumers in relation to their dress experience and their image.

The results in the UK also showed that *Education* is not an important variable to consider in the UK market, as the large majority of citizens reach a good level of education in British society[26]. The only *Indicator* with a relationship was *Colour*, which is a very subjective issue.

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[26] Education in the UK is compulsory until the age of 16.

Table 4.58 – Cross Tabs Indicators for Fashion and Clothing Consumption by Consumer Variables in the British Survey

Csmr-UK-2004		GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE	Number of relationships
ENVIRONMENTAL INFLUENCES	Beauty		OR>OC>NR>CP P 0.000												
	Brand	M>F P 0.035		O>W P 0.015			g -0.217 P 0.002	g -0.237 P 0.014		g -0.217 P 0.043					
	Climate	F>M P 0.054				g 0.187 P 0.013				g -0.285 P 0.011					
	Ease-of-Care						g 0.251 P 0.000			g 0.354 P 0.000		g 0.455 P 0.000	O>A>X>V P 0.013		22
	Elegance	F>M P 0.000													
	Fashion		OC>OR>NR>CP P 0.006	O>W P 0.001								g -0.339 P 0.001			
	Moral Conventions														
	Profession			O>W P 0.045											
	Functionality					g 0.216 P 0.006	g 0.234 P 0.002								
	Versatility	F>M P 0.001					g 0.200 P 0.050								
PSYCHOLOGICAL PROCESSES	Boldness			O>W P 0.020							g -0.331 P 0.008				
	Be Noticed	F>M P 0.000		W>O P 0.004			G -0.151 P 0.032					g 0.280 P 0.015			
	Exclusivity	M>F P 0.000					g 0.214 P 0.002					g 0.272 P 0.024			23
	Opposite Gender	F>M P 0.034					g -0.285 P 0.000				g -0.309 P 0.006	g -0.329 P 0.004			
	Personal Style		OR> NR>				g -0.342 P 0.000				g -0.400 P 0.000	g -0.325 P 0.003			
	Quality														
	Same Gender	F>M P 0.019					g -0.235 P 0.000					g -0.309 P 0.006			

INDIVIDUAL DIFFERENCES											Total
Sensuality	F>M P 0.000				g -0.166 P 0.023				g -0.234 P 0.044		
Age Appearance	F>M P 0.002		O>W P 0.014								
Attraction to Particular Clothes		OR>OC>NR>CP P 0.038									
Balance-Fit	F>M P 0.011										
Body Exposure								g 0.248 P 0.024			
Physical Adequacy	F>M P 0.000			g 0.287 P 0.001				g 0.248 P 0.045			
Colour			g 0.184 P 0.030				g 0.329 P 0.005		g 0.256 P 0.038		
Comfort	M>F P 0.008				g 0.284 P 0.000	g -0.295 P 0.015	g 0.234 P 0.009		g 0.360 P 0.000	O>A>V P 0.023	32
Durability					g -0.222 P 0.001				g -0.215 P 0.044	V>A>X>O P 0.047	
Fabric	F>M P 0.003				g 0.247 P 0.000						
Health		OR>NR>CP>OC P 0.039	O>W P 0.004								
Price					g 0.166 P 0.022		g 0.251 P 0.017			O>A>V P 0.013	
Taste		OR>OC>NR>CP P 0.004			g 0.246 P 0.004					O>V>A P 0.049	
Welfare	F>M P 0.000						g -0.304 P 0.041				
Number of Relationships	15	6	7	1	3	13	6	10	11	5	77

Note: The orange cells indicates the relationship where P<= 0.05.
The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.
Religion categories: NR - No Religion; CP - Christian Protestant; OC - Other Christian and OR - Other Religion
Ethnicity categories: W – white and O – other
Gender categories: F – female and M – male
Body Shape categories: A, V, X and O forms for females; A, V and O forms for males
Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

The indicator *Moral Conventions*, classified within the *Environmental Influences* category, did not present any correlation with the *Consumer Variables*. This can be explained by the need of the British consumer to be dressed, putting on clothing as protection against the weather.

In the *Psychological Processes* category, the indicator *Quality* presented no correlation with the *Consumer Variables*. Probably the British consumer considers *Quality* not as added value for a product, but something that is inherent to it.

The *Individual Processes* category was the most significant for British consumers, with 32 relationships. This result suggests that the consumer in the UK is lead better by his/her own choices and experience rather than by others including media influence.

The results shown for the British survey helped in understanding some of the indicators prevalence and assisted in the mapping of the consumer profile for fashion clothing consumption. The same procedure was carried out with the Brazilian and Chinese surveys, and the results are shown in the next sections.

4.7.1.2 Brazilian Consumers

As a second stage of this quantitative analysis, the cross tabs of the BR-2004 database between independent and dependent variables were calculated, as can be seen below (Table 4.59). Some new *Indicators for Fashion and Clothing Consumption*, not present in the UK-2004 database were included. As previously explained, they came from the qualitative analysis of the UK survey, and it was decided to test these new variables in the Brazilian and Chinese surveys.

The cross tabs between variables in the Brazilian survey showed *Gender* as the most important of the *Consumer Variables* with 16 relationships with the indicators, followed by *Age* (11), *Education* (10) and *Income* (9 relationships).

Male consumers considered *Profession*, *Moral Conventions* and *Brand* as the more relevant indicators when compared with the females' opinion. For higher educated Brazilians *Balance-Fit* and *Fabric* are the more important indicators. It is important to remember that education in Brazil is not yet for all, and this variable has great importance in the social class construct. The less affluent consumers found *Fashion*, *Moral Conventions*, *Boldness* and *Beliefs* as the more important indicators.

For older consumers, there is a heightened awareness of *Seasonality* and *Balance-Fit* while for younger consumers the *Indicators* from the *Psychological Processes* category were the most important.

210

Different from the UK results, the variable most related to the physical aspect of the consumer in Brazil, was *Weight*. The Brazilians' concern to maintain a balance in fitness and weight is well known.[27]

Amongst all *Consumer Variables*, *Religion, Height, Body Shape* and *Ethnicity* are the least important in this survey. As the vast majority of Brazilians are Christians, the religious aspect is not essential to the dress code, especially due to the fact that a great number of stated followers are actually not believers, but Christian for convenience. The possible explanation for the finding related to *Height* is that there is a very wide range in height within the Brazilian population and what really matters for these nationals is the shape, not the volume of the body. Due to the ethnic mix in Brazilian society, the local and regional geographic aspects seem to surpass the ethnic origin in choices of clothing and fashion products.

Table 4.59 – Cross Tabs Indicators for Fashion and Clothing Consumption by Consumer Variables in the Brazilian Survey

Csmr-BR-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE	Number of relationships
Beauty						g-0.143 P0.034					g-0.224 P0.008			
Brand	M>F P0.006													
Celebrity Influence						g-0.199 P0.001								
Climate	F>M P0.008													
Ease-of-Care														
Elegance														
Fashion		OR>CP>SP>CC>NR P0.027		g-0.137 P0.028	g-0.119 P0.048									16
Image Judgement														
Moral Conventions	M>F P0.005			g-0.199 P0.002	g-0.127 P0.034									

(Row group label: ENVIRONMENTAL INFLUENCES)

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[27] Brazil is the second country in the world in cosmetic surgery and a great consumer of beauty and fitness products

Group	Variable										
	Profession	M>F P 0.039									
	Functionality	F>M P 0.004									
	Seasonality	F>M P 0.048					g 0.166 P 0.011				
	Versatility					g 0.133 P 0.044					
PSYCHOLOGICAL PROCESSES	Boldness				g -0.143 P 0.021	g -0.177 P 0.003	g -0.124 P 0.029		g -0.249 P 0.000		X>V>O>A P 0.041
	Be noticed	F>M P 0.019					g -0.171 P 0.015				
	Exclusivity	F>M P 0.012	CC>SP>OR>CP>NR P 0.022						g -0.171 P 0.020	g -0.294 P 0.000	
	Ideology				g -0.198 P 0.004		g -0.222 P 0.000				
	Mood	F>M P 0.020					g -0.163 P 0.004	g 0.150 P 0.047			
	Opposite Gender	F>M P 0.005					g -0.143 P 0.017		g -0.172 P 0.027	g -0.250 P 0.001	
	Personal Style				g -0.131 P 0.042						
	Quality			EW>NM>AB>OE P 0.015	g 0.132 P 0.035				g -0.180 P 0.024	g -0.183 P 0.032	
	Same Gender	F>M P 0.004					g -0.155 P 0.009		g -0.194 P 0.013		V>X>A>O P 0.044
	Sensuality				g -0.130 P 0.042				g -0.228 P 0.002	g -0.163 P 0.037	
INDIVIDUAL DIFFERENCES	Age Appearance	F>M P 0.003				g 0.149 P 0.038					
	Attraction to Particular Clothes				g -0.121 P 0.050						
	Balance-Fit	F>M P 0.001		EW>NM>OE>AB P 0.029	g 0.216 P 0.011	g 0.168 P 0.030	g 0.172 P 0.024		g 0.248 P 0.049		
	Body Exposure	F>M P 0.000									

32

Indicator	1	2	3	4	5	6	7	8	9	10	
Physical Adequacy	F>M P 0.044										
Colour											
Comfort							g - 0.174 P 0.028				22
Durability											
Racial Roots										V>A>O P 0.041	
Fabric				g 0.148 P 0.031	g 0.156 P 0.013	g 0.128 P 0.040					
Health							g - 0.201 P 0.010			A>V>O P 0.027	
Price											
Beliefs	CP>OR>CC>SP>NR P 0.000			g - 0.175 P 0.030	g - 0.216 P 0.003						
Taste											
Welfare	F>M P 0.001										
Number of Relationships	16	3	2	10	9	11	3	7	5	4	70

Note: The orange cells indicates the relationship where $P \leq 0.05$.

The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.

Religion categories: NR - No Religion; CC- Christian Roman Catholic; CP - Christian Protestant; SP - Spiritism and OR - Other Religion

Ethnicity categories: NM – native/mixed; EW – European/white; AB – African/black and OE – other ethnicity

Gender categories: F – female and M – male

Body Shape categories: A, V, X and O forms for females; A, V and O forms for males

Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

In the Brazilian case, the *Indicators* that presented no relationship to any of the consumer variables were *Ease-of-Care, Elegance, Image Judgement* which pertain to the *Environmental Influences* category; *Colour, Durability, Price* and *Taste* which are from *Individual Differences* category of need recognition. There is probably no main consumer variable to explain these indicators in the study.

On the other hand, 32 relationships were found between the indicators from the category *Psychological Processes* and the consumer variables. This result suggests that the Brazilian consumer is very susceptible to information and learning processes when consuming fashion clothing products.

In order to continue the sequence of analyses and the final comparison between the consumers from the three countries, the next section presents the results related to the Chinese survey.

4.7.1.3 Chinese Consumers

When running the cross tabs within the Chinese consumer survey, the results indicated that *Gender* and *Age* are the most relevant *Consumer Variables* with 14 and 13 relationships, respectively (Table 4.60). On the other hand, *Religion* and *Education* are the consumer profile variables with fewer connections with the *Indicators*. There is a current effort from the Chinese government and society to give basic education to all citizens, the survey carried out in this research could not find great discrepancies within the society. As explained in Section 4.1.3, probably for similar reasons, issues relating to beliefs and religions are still a taboo in public.

Chinese male consumers considered *Functionality*, *Durability* and *Beliefs* as more relevant than female consumers, showing an expressive distinction in relation to male consumers from the UK and Brazil.

Older Chinese consumers stated more importance for *Ease-of-Care*, *Functionality*, *Seasonality*, *Physical Adequacy*, *Colour* and *Comfort* while younger consumers are more aware of *Image Judgement*, *Exclusivity*, *Mood* and *Sensuality*, among others. These results suggest that older Chinese consumers are closer to older British consumers and younger Chinese consumers are closer to younger Brazilian consumers.

Within the physical profile variables, *Body Mass* presented the highest score of relationships (although this did not feature extensively in the Brazilian survey), with corpulent consumers' priorities on *Functionality* and *Comfort*. It is important to notice that in relation to *Height* and *Weight*, relationships were found with male consumers only, which suggests that the awareness for physical issues within the Chinese men is higher than amongst the women.

Table 4.60 – Cross Tabs Indicators for Fashion and Clothing Consumption by Consumer Variables in the Chinese Survey

Csmr-CN-2004		GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE	Number of relationships
ENVIRONMENTAL	Beauty													q>a>o P 0.004	
	Brand														
	Celebrity Influence					q 0.206 P 0.001	q -0.233 P 0.000								
	Climate														

Category	Attribute	C1	C2	C3	C4	C5	C6	C7	C8	C9	Count
	Ease-of-Care	F>M P 0.048				g 0.160 P 0.047					
	Elegance										
	Fashion									A>O>V P 0.048	
	Image Judgement				g 0.242 P 0.001	g -0.181 P 0.023					16
	Moral Conventions		H>M P 0.037								
	Profession										
	Functionality	M>F P 0.000			g -0.214 P 0.017	g 0.427 P 0.000			g 0.390 P 0.002		
	Seasonality				g -0.304	g 0.334 P 0.000					
	Versatility	F>M P 0.005									
PSYCHOLOGICAL PROCESSES	Boldness	F>M P 0.019									
	Be Noticed	F>M P 0.004									
	Exclusivity					g -0.158 P 0.044	g 0.263 P 0.038	g 0.263 P 0.038			
	Ideology		NR>BD>OR	g -0.203 P 0.029							
	Mood	F>M P 0.048	M>H P 0.012			g -0.218 P 0.002					26
	Opposite Gender	F>M P 0.011				g -0.362 P 0.000			g -0.271 P 0.024		
	Personal Style		M>H P 0.013		g 0.184 P 0.007				g -0.221 P 0.046	A>X>V>O P 0.001	
	Quality										
	Same Gender	F>M P 0.013	M>H P 0.038			g -0.231 P 0.001			g -0.263 P 0.019		
	Sensuality	F>M P 0.044	M>H P 0.050			g -0.216 P 0.007	g -0.349 P 0.010	g -0.349 P 0.010			
INDIVIDUAL	Age Appearance	F>M P 0.015								V>O>A>X P 0.027	
	Attraction To Particular Clothes										
	Balance-Fit				g -0.187 P 0.034		g -0.408 P 0.004	g -0.408 P 0.004			

											Total
Body Exposure											
Physical Adequacy			g - 0.272 P 0.050	g - 0.370 P 0.000	g 0.301 P 0.009		g - 0.549 P 0.000	g - 0.549 P 0.000			
Colour	F>M P 0.038	OR>NR>B D	g - 0.230 P 0.033	g - 0.208 P 0.015	g 0.263 P 0.002						
Comfort					g 0.290 P 0.000			g 0.290 P 0.014			
Durability	M>F P 0.021										27
Racial Roots											
Fabric	F>M P 0.002							g - 0.246 P 0.024			
Health											
Price				g - 0.427 P 0.000							
Beliefs	M>F P 0.042		M>H P 0.045								
Taste											
Welfare		OR>NR>BD P 0.039	H>M P 0.003					g - 0.346 P 0.011	g - 0.346 P 0.011		
Number of Relationships	14	3	7	3	9	13	5	5	6	4	69

Note: The orange cells indicates the relationship where P<= 0.05.
   The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.
   Religion categories: NR - No Religion; BD- Buddhist and OR - Other Religion
   Ethnicity categories: H – Han and M – Manchu
   Gender categories: F – female and M – male
   Body Shape categories: A, V, X and O forms for females; A, V and O forms for males
Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

No relationship was found between the consumer profile and the *Environmental Influence* indicators *Brand, Climate, Elegance, Profession;* the same absence with the indicator *Quality* from the *Psychological Processes* group; and also with *Attraction to Particular Clothes, Racial Roots, Health* and *Taste* that pertain to the *Individual Differences* category in the Chinese sample. These results suggest that some *Indicators* are crucially more important to Chinese consumers, and they vary according to a combination of consumer variables, making consumer choice more complex.

In order to summarize some of the findings related with the differences and similarities found out between the three targeted countries, next section contains a comparison considering the need recognition categories.

4.7.1.4 Consumer Comparison

The first comparison relates to the number of relationships found in each sample. 77 significant relationships were found between *Indicators* and *Consumer Variables* in the UK survey, with British consumers giving more consideration to the consumer variables in the *Individual Differences* category of *Need Recognition* (32 relationships). The second priority was the *Environmental Influences* category with 23 relationships and the last was the *Psychological Processes* one presenting 22 relationships.

In the Brazilian sample 70 significant relationships were found. Making a comparison between categories of *Need Recognition*, it can be affirmed that *Psychological Processes* have the highest interface with the Brazilian consumer variables with 32 relationships, followed by *Individual Differences* with 22 relationships. The category *Environmental Influences* presented the lowest number of relationships (16) with the variables in the study.

In the Chinese survey 69 significant relationships were found. The category of *Need Recognition* which presented the greatest number of relationships to consumer variables, was *Individual Differences* (27), followed by the *Psychological Processes* category with 26 relationships, and the *Environmental Influences* occupied the lowest place with 16 relationships.

Inside all three samples, *Age* and *Gender* had the higher number of relationships within the *Indicators for Fashion and Clothing Consumption*. In the UK survey, the third most important consumer variable was *Body Mass*, while for Brazilians it was *Education* and for Chinese it was *Income*.

These results suggest that in a mature society (UK), where the basic problems were solved and the vast majority of the population has decent minimal conditions to live in, socio-physical variables can emerge with regards to fashion clothing consumption. On the other hand, emergent societies, where the level of survival is still an everyday struggle, socio-economic variables are still dominant as a major consumption criteria.

In an attempt to understand better and possibly explain the phenomena of fashion clothing consumption within three different consumer target areas, some theories discussed in the Literature Review chapter were tested, using inferential statistics.

The next section (4.7.2) presents the results of the application of factor analysis within the theory of Human Needs developed by Maslow (1987). The succeeding section (4.7.3) presents the procedures held with the Flügel theory of Motivation for Clothing (1930), followed by the analysis of the Theory of Pleasures conceived by Tiger and Jordan (1992, 2000) in Section 4.7.4. The last section of this chapter brings out the comparison between the results of the adaptation of the theories for fashion clothing consumption.

In the next stage of the research only those *Indicators for Fashion and Clothing Consumption* in common to all three samples were considered (31). This decision was made in order to have exactly the same comparative parameters within the three targeted national groups of consumers.

4.7.2 Human Needs

In an attempt to clarify understanding of the consumer expectations in relation to fashion clothing products, the use of the *Human Needs* theory seems to be a good start. As explained in the Literature Review (Section 2.2.3.1) Maslow's theory (1987) is based on the homeostasis concept which is an active human process in seeking a pleasant balance (Solomon and Rabolt, 2004). More over, this theory considers that when one need is satisfied, automatically, another need emerges.

Considering the fact that possibly a hierarchy of the *Indicators for Fashion and Clothing Consumption* maybe exists based on the profile of the consumer, the original five needs from Maslow's theory were adapted to fashion clothing consumption.

The analysis is based on inferential statistical tools and some of the theories discussed earlier. Factor analysis was used with the intention of reducing the quantity of variables in use, and to consider an interpretation of Maslow's needs for fashion clothing consumption. The method adopted was the Varimax orthogonal rotation, using only $P<=0.05$ for analysis. The reliability test, Cronbach's alpha, was used to ensure the quality of the results. According to Churchill (1979), a Cronbach's alpha between 0.50 and 0.60 is adequate, but a coefficient of 0.6 to 0.8 is desirable for exploratory research.

Considering the definition of each need from Maslow's work, the core task was to map the *Indicators for Fashion and Clothing Consumption* in the best arrangement for an adaptation, linking the nature of the *Indicator* with the *Need* definition. The improved result is showed below (Table 4.61).

Table 4.61 –Interpretation of Maslow's Needs for Fashion Clothing Consumption

Maslow's Human Needs				
Physiological	Safety	Social	Esteem	Self Actualisation
Climate	Balance-Fit	Age Appearance	Beauty	Attraction to Particular Clothes
Moral Conventions	Functionality	Ease-of-Care	Elegance	Welfare
Fabric	Comfort	Fashion	Body Exposure	Colour
Health	Durability	Versatility	Brand	Personal Style
	Price	Opposite Gender	Be Noticed	Taste
	Profession	Same Gender	Sensuality	Boldness
	Quality		Exclusivity	
	Physical Adequacy			

Maslow's theory recognizes five needs: (1) *Physiological*: associated to the state of being alive, starving, freezing, etc., which is closer to *Climate, Moral Conventions, Fabric* and *Health* indicators; (2) *Safety*: linked to the guarantee of being alive, physical risk, freedom from risk, etc., that can be interpreted for clothing by indicators as *Balance, Functionality, Comfort, Durability, Price, Profession, Quality* and *Physical Adequacy*; (3) *Social*: allied to love and belonging to a social or tribal context, which can be linked to some indicators as *Age Appearance, Ease-of-Care, Fashion, Versatility, Opposite Gender* and *Same Gender*; (4) *Esteem*: affiliated to recognition of a social group which can be translated as *Beauty, Elegance, Body Exposure, Brand, Be Noticed, Sensuality* and *Exclusivity* and (5) *Self Actualisation*: the subjective need to do your best which can lead to *Attraction to Particular Clothes, Welfare, Colour, Personal Style, Taste* and *Boldness*.

Moving ahead with the procedures, factor analysis was used with the intention of reducing the quantity of variables in use and to consider an interpretation of Maslow's needs for fashion clothing consumption. The next sections present the best possible arrangement found for the fashion clothing consumption needs within the British, Brazilian and Chinese consumer databases after the procedures with SPSS software.

4.7.2.1 British Consumers

Reviewing the sequence of procedures adopted, the UK-2004 results noted that the group of *Indicators* for *Physiological, Safety, Social, Esteem* and *Self-Actualisation* needs was insufficient to guarantee the expected level for Cronbach's alpha coefficient. During the process of variable reduction in factor analysis, some *Indicators* were excluded to provide better reliability of the final factors. The Barlett Test of Sphericity (BTS) and the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy have shown appropriated values for the factor analysis reduction. The best possible arrangements for the *Needs* after 17 iterations are shown in Table 4.62.

The expected Cronbach's alpha appeared within the desirable coefficient but only in the *Esteem* Need. Even knowing that the other *Needs* were subject to low values for Cronbach's alpha, the analysis has continued, knowing that some of the results would not achieve the expected level of statistical significance as previously defined.

Table 4.62 – Factor Analysis Results for Csmr-UK-2004 Interpretation of Maslow's Needs for Fashion Clothing Consumption

Csmr-UK-2004				
Physiological	**Safety**	**Social**	**Esteem**	**Self Actualisation**
Climate Fabric Health	Balance-Fit Functionality Price Physical Adequacy	Age Appearance Fashion Opposite Gender Same Gender	Beauty Elegance Body Exposure Be Noticed Sensuality	Welfare Colour Personal Style Boldness
α Cronbach = 0.38 KMO = 0.53 BTS χ² = 22.78 P = 0.000 44% of Variance	α Cronbach = 0.47 KMO = 0.54 BTS χ² = 81.25 P = 0.000 40% of Variance	α Cronbach = 0.46 KMO = 0.56 BTS χ² =69.76 P = 0.000 39% of Variance	α Cronbach = 0.61 KMO = 0.69 BTS χ² = 158.08 P = 0.000 41% of Variance	α Cronbach = 0.44 KMO = 0.62 BTS χ² = 37.99 P = 0.000 37% of Variance

Note: Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Investigating further, the following stage was to test the existence of relationship between the *Needs* and the consumer profile variables. The procedures carried out with SPSS consider that when both *Needs* and *Consumer Variables* were ordinal, the gamma test was applied, and where the consumer variable is nominal, Mann-Whitney and Kruskal-Wallis tests were used. The results are shown in Table 4.63 below.

Table 4.63 – Cross Tabs Needs by Consumer Variables in the British Survey

Csmr-UK-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE
Physiological	F>M P 0.027					g 0.146 P 0.038							
Safety	F>M P 0.003												
Social	F>M P 0.005	OR>OC>NR>CP P 0.027				g -0.373 P 0.000				g -0.279 P 0.010	g -0.483 P 0.000		
Esteem	F>M P 0.000					g -0.154 P 0.023							
Self Actualisation	F>M P 0.013				g -0.137 P 0.049					g -0.267 P 0.041			

Note: The orange cells indicates the relationship where P<= 0.05.
The + signal indicates a positive relationship between the ordinal variables while the – signal indicates a negative relationship.
Religion categories: NR - No Religion; CP - Christian Protestant; OC - Other Christian and OR - Other Religion
Ethnicity categories: W – white and O – other
Gender: F – female and M – male
Body Shape: A, V, X and O forms for females; A, V and O forms for males
Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Gender was presented as the most relevant variable in relation to the *Needs*. In the British survey all *Needs* seemed to be more relevant to female rather than male consumers. On the other hand, two significant relationships between *Weight* for male consumers and *Social* and *Self Actualisation* Needs were found. In both cases, lighter male consumers seemed to have more awareness in relation to these Needs. Moreover, it was observed a tendency for consumers with less Body Mass, from both genders, to give more importance to the *Social* Need.

Age is more important for younger consumers within *Social*, *Esteem* and *Self Actualisation* Needs. The more educated the consumer, the higher his/her concern with *Physiological* Needs. Christian Protestants found *Social* Need less important if compared with other categories. The category of consumers that considered the *Social* Need most relevant were people from Other Religions, followed by Other Christians and No Religion.

The same procedures carried out in the British survey were then applied to the Brazilian and the Chinese. The next section presents the results of the analysis for the Chinese and Brazilian consumer *Needs*.

4.7.2.2 *Brazilian Consumers*

The same procedures used for Csmr-UK-2004 were calculated for the Csmr-BR-2004 database. The new variables that do not exist in Csmr-UK-2004 (the seven new indicators) were suppressed to allow a perfect comparison. The best possible arrangements for the *Needs* after 16 iterations are shown in Table 4.64. The expected Cronbach's alpha coefficient appeared as desirable only in *Safety* and *Esteem* needs for the Brazilian survey although the coefficient reached an adequate level for all needs. The Barlett Test of Sphericity (BTS) and the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy have shown appropriated values for the factor analysis reduction.

Table 4.64 – Factor Analysis Results for Csmr-BR-2004 Interpretation of Maslow's Needs for Fashion Clothing Consumption

Csmr-BR-2004				
Physiological	Safety	Social	Esteem	Self Actualisation
Climate	Balance-Fit	Fashion	Beauty	Welfare
Fabric	Functionality	Versatility	Elegance	Colour
Health	Price	Opposite Gender	Body Exposure	Taste
	Physical Adequacy	Same Gender	Be Noticed	
			Sensuality	
			Exclusivity	
α Cronbach = 0.37	α Cronbach = 0.69	α Cronbach = 0.55	α Cronbach = 0.68	α Cronbach = 0.54
KMO = 0.51	KMO = 0.72	KMO = 0.54	KMO = 0.73	KMO = 0.58
BTS χ^2 = 42.97	BTS χ^2 = 234.79	BTS χ^2 = 225.61	BTS χ^2 = 264.15	BTS χ^2 = 42.97
P = 0.000	P = 0.000	P = 0.000	P = 0.000	P = 0.000
46% of Variance	53% of Variance	46% of Variance	39% of Variance	54% of Variance

Note: Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

221

The cross tabs procedures revealed significant relationships (Table 4.65). As identified in the British survey, *Gender* also influenced the *Needs*. Again, female consumers considered all *Needs* more relevant compared with male consumers. *Weight* had a relationship with *Social* and *Esteem* needs, and seemed to be more important to female consumers with lower weight, and the same tendency was found for lower *Body Mass*.

Religion showed an influence on *Safety* and *Self Actualisation* Needs. In both cases, Roman Catholics are the consumers who demonstrated more awareness.

European/White consumers showed their priority for *Physiological* Need and Native/Mixed ethnic consumer groups stated their preference for *Safety* Need.

Affluent consumers tended to prioritize *Safety* Need and younger consumers demonstrated their concern with *Social* Need.

Table 4.65 – Cross Tabs Needs by Consumer Variables in the Brazilian Survey

Csmr-BR-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE
Physiological	F>M P 0.010		EW>NM> >AB>OE P 0.013										
Safety	F>M P 0.002	CC>SP>CP> >NR>OR P 0.044	NM>EW> >OE>AB P 0.040		g 0.201 P 0.016								
Social	F>M P 0.000					g -0.130 P 0.026			g -0.179 P 0.018		g -0.195 P 0.007		
Esteem	F>M P 0.005								g -0.177 P 0.020		g -0.166 P 0.038		
Self Actualisation	F>M P 0.004	CC>OR>SP> >NR>CP P 0.016											

Note: The orange cells indicates the relationship where P<= 0.05.
The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.
Religion categories: NR - No Religion; CC- Christian Roman Catholic; CP - Christian Protestant; SP - Spiritism and OR - Other Religion
Ethnicity categories: NM – native/mixed; EW – European/white; AB – African/black and OE – other ethnicity
Gender: F – female and M – male
Body Shape: A, V, X and O forms for females; A, V and O forms for males
Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Following on from the analysis of the Brazilian survey, the next section presents the same procedures for the Chinese survey. After this, a comparison between the consumers of all three countries in relation to *Needs* is discussed.

4.7.2.3   Chinese Consumers

The same procedures used for Csmr-UK-2004 and Csmr-BR-2004 databases were also calculated for the Csmr-CN-2004 database. The best results for the Chinese survey where indicators were blended to form *Needs* data are shown in Table 4.66 below (16 iterations).

Although the Barlett Test of Sphericity (BTS) and the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy have shown appropriated values for the factor analysis reduction, the Cronbach's alpha appeared within an adequate coefficient only in the *Safety*, *Social* and *Esteem* Needs. Even knowing that the other needs were subject to low values for Cronbach's alpha, the analysis has continued in order to find out the relationship with the *Consumer Variables*.

Table 4.66 – Factor Analysis Results for Csmr-CN-2004 Interpretation of Maslow's Needs for Fashion Clothing Consumption

Csmr-CN-2004				
Physiological	Safety	Social	Esteem	Self Actualisation
Climate	Balance-Fit	Fashion	Beauty	Welfare
Fabric	Comfort	Versatility	Elegance	Colour
Health	Price	Opposite Gender	Be Noticed	Personal Style
	Physical Adequacy	Same Gender	Sensuality	Boldness
			Exclusivity	
α Cronbach = 0.28	α Cronbach = 0.51	α Cronbach = 0.55	α Cronbach = 0.56	α Cronbach = 0.33
KMO = 0.55	KMO = 0.63	KMO = 0.63	KMO = 0.68	KMO = 0.58
BTS χ^2 = 8.01	BTS χ^2 = 53.52	BTS χ^2 = 72.81	BTS χ^2 = 96.27	BTS χ^2 = 20.28
P = 0.046	P = 0.000	P = 0.000	P = 0.000	P = 0.002
41% of Variance	41% of Variance	43% of Variance	38% of Variance	34% of Variance

Note: Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Processing the cross tabs, the consumer variables of *Gender* and *Age* had the greatest relationship with *Needs* (Table 4.67). Female consumers are more aware than male consumers in relation to *Social, Esteem* and *Self Actualisation* Needs. Older consumers considered *Safety* Need more important than younger consumers. On the other hand, younger consumers stated they give more concern to *Social* and *Esteem* Needs when compared to old consumers.

Table 4.67 – Cross Tabs Needs by Consumer Variables in the Chinese Survey

Csmr-CN-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE
Physiological				g – 0.203 P 0.033									
Safety				g – 0.362 P 0.000	g 0.247 P 0.000			g – 0.440 P 0.000		g – 0.440 P 0.000	g 0.209 P 0.048		
Social	F>M P 0.000				g – 0.249 P 0.001								
Esteem	F>M P 0.009					g – 0.188 P 0.019							
Self Actualisation	F>M P 0.037									g – 0.297 P 0.018	g – 0.297 P 0.018		

Note: The orange cells indicates the relationship where P<= 0.05.
 The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.
 Religion categories: NR - No Religion; BD- Buddhist and OR - Other Religion
 Ethnicity categories: H – Han and M – Manchu
 Gender categories: F – female and M – male
 Body Shape categories: A, V, X and O forms for females; A, V and O forms for males
Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Consumers with a lower *Education* level prioritised *Physiological* Need and poor consumers gave more concern to *Safety* Need when compared to wealthy ones.

In relation to physical variables (in blue), overweight Chinese consumers, in general, seemed to give more awareness to *Safety* Need. When analysing by *Gender*, shorter and lighter male consumers considered *Safety* and *Self Actualisation* Needs more important than other consumers.

The next section presents a comparative analysis of the three countries results in relation to the fashion clothing *Needs* adapted from Maslow's theory.

4.7.2.4   Consumer Comparison

The analysis of the significant relationships between the factors (*Needs* for Fashion and Clothing Consumption) and the *Consumer Variables* in the three surveys is shown below. Some similarities and differences were found within the three national targets (Table 4.68).

The analysis for *Physiological* Need showed that this Variable is most important for female consumers in all three surveys, White/European consumers in Brazil, higher educated consumers in the UK and lower level educated consumers in China. As the Need is formed by *Climate*, *Fabric* and *Health* indicators, the results suggest that for the British and Brazilian consumers this Need, although a basic need for Maslow, turns in to a sophisticated Need when applied to fashion clothing products.

The only correlation found between the *Safety* Need and British consumers was with *Gender*, with female consumers having higher awareness. The same tendency was noted in the Brazilian survey, although this Need also presented relationships with *Religion*, *Ethnicity* and *Income*. For Chinese consumers, there was a relationship between *Safety* Need and not only with Socio-Economic Variables (*Age* and *Income*), but also with Physical Variables (*Height male*, *Weight male* and *Body Mass*). Considering that the Safety Need is a reduction of the indicators: *Balance-Fit*, *Comfort*, *Functionality*, *Price* and *Physical Adequacy*, it is an unexpected result that only the Chinese survey presented a link with the Physical Variables, which suggests that this group of *Indicators* demands further investigation.

The *Social* Need results, shaped from a combination of *Age Appearance*, *Fashion*, *Versatility*, *Opposite Gender* and *Same Gender*, showed some similarities for the three targeted nationals in regards to *Gender* and *Age*. Female and younger consumers have more concern about this need than other categories of consumers. Relationships between Physical Variables and *Social* Need were found in the British and Brazilian surveys, which suggests that there is a social pressure for body and image to be at an ideal standard.

In the *Esteem* Need analysis a coincident relationship was found between British and Chinese consumers with regards to *Gender*. Female consumers considered this need (a combination of *Beauty*, *Elegance*, *Body Exposure*, *Be Noticed*, *Sensuality* and *Exclusivity*) more important than males. For Brazilian consumers only, underweight consumers showed correlation with the *Esteem* Need, which indicates a higher pressure for a perfect body within Brazilian society.

The *Self Actualisation* Need presented a number of correlations with consumer variables, but only one was present in all three surveys (*Gender*, females); and the other was coincidental for both British and Chinese surveys (*Weight*, males). Considering that this Need was a reduction of the indicators: *Welfare, Colour, Personal Style, Boldness* and *Taste* a relationship with *Gender* was more expected than with a Physical Variable. This result should be further investigated.

Table 4.68 – Cross Tabs Statistics between Needs for Fashion Clothing Consumption and Consumer Variables by Nationality

NEEDS	Csmr-UK-2004	Csmr-BR-2004	Csmr-CN-2004
Physiological	Gender Education	Gender Ethnicity	Education
Safety	Gender	Gender Religion Ethnicity Income	Income Age Height Male Weight Male Body Mass
Social	Gender Religion Age Weight Male Body Mass	Gender Age Weight Female Body Mass	Gender Age
Esteem	Gender Age	Gender Weight Female Body Mass	Gender Age
Self Actualisation	Gender Age Weight Male	Gender Religion	Gender Height Male Weight Male

The study of the Maslow Needs adapted for fashion clothing consumption showed very interesting results, although the totality of the findings could not be clearly explained. As further investigation was suggested, the next section presents the use of the Flügel's Motives theory, directly relating to dress, in order to attempt to find some answers to the research questions.

4.7.3 Motives for Dressing

The next theory tested using quantitative analysis was the Flügel Motivation for Clothing which is based on the explanation of three general *Motives* for the development of the garments within human society: *Protection, Decoration* and *Modesty.*

The procedures to reduce the *Indicators for Fashion and Clothing Consumption* into the three *Motives* were the same as described in the previous section. Flügel's theory, as discussed in Section 2.2.4 of the Literature Review, should firstly be linked with the *Indicators for Fashion and Clothing Consumption*, as seen in Table 4.69.

The *Protection* Motive, as explained in Chapter 2, is connected with the avoidance of unpleasant sensations relating to climate changes and/or strange organisms. The following indicators can better fit into this category: *Functionality, Ease-of-care, Durability, Climate, Fabric, Welfare, Comfort, Quality* and *Health*.

The second of the Flügel's Motives is *Decoration*, which relates to the issues of enhancing and differentiating physical appearance as well as attracting the attention of others. The indicators: *Boldness, Colour, Beauty, Attraction to Particular Clothes, Balance-Fit, Exclusivity, Be Noticed, Sensuality, Versatility, Fashion, Taste, Personal Style, Elegance* and *Age Appearance* are the ones that better explain this motivation.

Lastly, the *Modesty* Motive, associated with the control of physical and psychological eminence of an individual within a group, is better shaped by the indicators *Profession, Opposite Gender, Same Gender, Moral Conventions, Physical Adequacy, Brand, Body Exposure* and *Price*.

Table 4.69 –Interpretation of Flügel's Motives for Fashion Clothing Consumption

Flügel's Motives		
Protection	Decoration	Modesty
Functionality	Boldness	Profession
Ease-of-Care	Colour	Opposite Gender
Durability	Beauty	Same Gender
Climate	Attraction to Particular Clothes	Moral Conventions
Fabric	Balance-Fit	Physical Adequacy
Welfare	Exclusivity	Brand
Comfort	Be Noticed	Body Exposure
Quality	Sensuality	Price
Health	Versatility	
	Fashion	
	Taste	
	Personal style	
	Elegance	
	Age Appearance	

The next stage of the analysis is to blend the *Indicators* into the three Flügel's *Motives* using factor analysis. The results of the British, Brazilian and Chinese surveys are described in the next three subsections, as well as the relationships found with the Consumer Profile Variables.

4.7.3.1   British Consumers

The sequence of procedures revealed that in the Csmr-UK-2004 results the group of *Indicators* planned to form the *Protection* and *Modesty* Motives were insufficient to guarantee the expected level for Cronbach's alpha coefficient. The expected Cronbach's alpha appeared within the desirable coefficient only in the *Decoration* Motive.

On the other hand, the Barlett Test of Sphericity (BTS) and the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy have shown appropriated values for the factor analysis reduction. Table 4.70 shows the results of the reduction procedure (after 19 iterations) in the British survey for *Indicators for Fashion and Clothing Consumption* to *Motives* for wearing clothes.

Table 4.70 – Factor Analysis Results for Csmr-UK-2004 Interpretation of Flügel's Motives for Fashion Clothing Consumption

Csmr-UK-2004		
Protection	**Decoration**	**Modesty**
Functionality	Balance	Opposite Gender
Climate	Be Noticed	Same Gender
Fabric	Versatility	Brand
Welfare	Elegance	Body Exposure
Quality	Age Appearance	
α Cronbach = 0.41	α Cronbach = 0.72	α Cronbach = 0.48
KMO = 0.61	KMO = 0.72	KMO = 0.56
BTS χ² = 38.49	BTS χ² = 310.92	BTS χ² = 73.73
P = 0.000	P = 0.000	P = 0.000
30% of Variance explained	43% of Variance explained	40% of Variance explained

Note: Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Crossing the factors (*Motives*) with the independent *Consumer Variables*, a relationship between *Gender* and *Protection* and *Decoration* Motives was found. In both cases, females are more aware of these motives than males (Table 4.71).

Table 4.71 - Cross Tabs Motives by Consumer Variables in the British Survey

Csmr-UK-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE
Protection	F>M P 0.001				g 0.155 P 0.036								
Decoration	F>M P 0.000												
Modesty						g −0.282 P 0.000					g −0.249 P 0.026	g −0.322 P 0.002	

Note: The orange cells indicates the relationship where P<= 0.05.
The + signal indicates a positive relationship between the ordinal variables while the – signal indicates a negative relationship.
Gender: F – female and M – male
Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Moreover, affluent consumers considered the *Protection* Motive more than poor consumers. This result is unexpected in that needy people might be expected to consider this motive more, and this finding suggests further investigation.

In relation to *Modesty*, younger and underweight male consumers demonstrated more awareness in the British survey. This finding suggests a consideration of modesty/immodesty while the underweight males concerns possibly indicate a tendency to hide/show their outstanding bodies.

Following the sequence of the research plan, the subsequent sections present procedures carried out in the Brazilian and Chinese surveys. The next section discusses a comparison between the results of the three nationalities.

4.7.3.2 Brazilian Consumers

The same procedures were run using factor analysis in the Brazilian consumer survey. The Barlett Test of Sphericity (BTS) and the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy have shown appropriated high values for the factor analysis reduction. Moreover, the Cronbach's alpha coefficient presented a very desirable result for all three Motives. The results of the best combination after 18 iterations are shown in Table 4.72.

Table 4.72 – Factor Analysis Results for Csmr-BR-2004 Interpretation of Flügel's Motives for Fashion Clothing Consumption

Csmr-BR-2004		
Protection	**Decoration**	**Modesty**
Functionality	Colour	Opposite Gender
Ease-of-Care	Beauty	Same Gender
Climate	Balance-Fit	Physical Adequacy
Fabric	Be Noticed	Body Exposure
Welfare	Sensuality	
	Elegance	
	Age Appearance	
α Cronbach = 0.66	α Cronbach = 0.75	α Cronbach = 0.66
KMO = 0.72	KMO = 0.80	KMO = 0.60
BTS χ^2 = 217.18	BTS χ^2 = 429.22	BTS χ^2 = 253.61
P = 0.000	P = 0.000	P = 0.000
43% of Variance explained	41% of Variance explained	50% of Variance explained

Note: Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Continuing the procedures, the statistical tests with relationships between the *Motives* and the *Consumer Variables* were carried out. As with the previous analysis's, *Gender* is the single most important, presenting relationships with all three Motives, and being more relevant to female consumers (Table 4.73).

In the Brazilian sample, European/White descendents showed more awareness for the *Decoration* Motive surpassing the known desire of native/mixed Brazilians to adorn themselves.

Table 4.73 - Cross Tabs Motives by Consumer Variables in the Brazilian Survey

Csmr-BR-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE
Protection	F>M P 0.000												
Decoration	F>M P 0.001		EW>NM> >AB>OE P 0.030										
Modesty	F>M P 0.000					g –0.189 P 0.002				g –0.178 P 0.025	g –0.162 P 0.046		

Note: The orange cells indicates the relationship where P<= 0.05.
   The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.
      Ethnicity categories: NM – native/mixed; EW – European/white; AB – African/black and OE – other ethnicity
      Gender: F – female and M – male
   Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

In the Brazilian survey the results for *Modesty* and *Age* demonstrated showed closer results with the British survey, where younger consumers considered morality/immodesty more important than older consumers. Additionally, the Physical Variables showed a relationship only with the *Modesty* Motive. In both cases, underweight males showed higher concern for *Body Mass* and *Weight*.

Continuing the flow of the investigation, the next section presents the results for the Chinese survey in relation to the Flügel's Motives for clothing.

4.7.3.3 *Chinese Consumers*

Factor analysis procedures were used to reduce the *Indicators* of the Flügel's Motives for clothing in the Chinese consumer survey (21 iterations). The results produced a desirable blend for *Decoration* and an adequate one for *Protection* considering the Cronbrach's alpha coefficients. On the other hand, the alpha coefficient for the *Modesty* Motive presented a level under the expected. The Barlett Test of Sphericity (BTS) has shown an appropriated value for the factor analysis reduction and the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy has showed a slightly low level value (Table 4.74).

Table 4.74 – Factor Analysis Results for Csmr-CN-2004 Interpretation of Flügel's Motives for Fashion Clothing Consumption

Csmr-CN-2004		
Protection	**Decoration**	**Modesty**
Fabric	Colour	Opposite Gender
Comfort	Balance-Fit	Same Gender
Quality	Be Noticed	Physical Adequacy
	Versatility	
	Fashion	
	Elegance	
	Age Appearance	
α Cronbach = 0.59	α Cronbach = 0.69	α Cronbach = 0.45
KMO = 0.59	KMO = 0.77	KMO = 0.49
BTS χ² = 71.63	BTS χ² = 212.56	BTS χ² = 50.13
P = 0.000	P = 0.000	P = 0.000
55% of Variance explained	36% of Variance explained	49% of Variance explained

Note: Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

After testing the significant relationships of the *Motives* with the *Consumer Variables*, it can be said that female consumers seemed to consider *Decoration* and *Modesty* more relevant than males (Table 4.75). Chinese younger consumers also showed an awareness of the *Modesty* Motive, a similar result to the British and Brazilian surveys.

In the physical variables, the slimmer, lighter consumers (especially men) showed more concern for the *Modesty* Motive. A relationship was also found with the female *Body Shape* and the *Decoration* Motives. Consumers with a "V" figure presented more awareness of this motive, followed by the "O" figure, the "A" and the "X" figure as last, which indicates that the figures less like the 'natural' female shape use adornment, possibly to make their profiles more attractive.

Table 4.75 - Cross Tabs Motives by Consumer Variables in the Chinese Survey

Csmr-CN-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE
Protection													
Decoration	F>M P 0.002											V>O>A>X P 0.042	
Modesty	F>M P 0.001					g –0.224 P 0.005		g – 0.248 P 0.041		g – 0.248 P 0.041	-g – 0.269 P 0.022		

Note: The orange cells indicates the relationship where P<= 0.05.
   The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.
Gender categories: F – female and M – male
   Body Shape categories: A, V, X and O forms for females; A, V and O forms for males
Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

It is important to highlight that the *Protection* Motive had not presented any significant relationship with the *Consumer Variables*. Considering that this motive is a blend of some *Indicators* previously important to Chinese consumers, this finding suggests further analysis.

4.7.3.4 Consumer Comparison

In order to summarize some of the findings, a comparative analysis was made between the *Motives* relationships and the *Consumer Variables* of the three surveys (Table 4.76).

The *Protection* Motive, shaped from a combination of *Functionality, Climate, Fabric, Welfare, Quality* and *Ease-of-Care*, was more important to British and Brazilian female consumers and to affluent and underweight male consumers.

Decoration, a blend of *Balance, Be Noticed, Versatility, Elegance, Age Appearance, Colour, Beauty, Balance-Fit, Fashion* and *Sensuality*, presented an interesting relationship with *Body Shape* in the Chinese survey. Moreover, in the Brazilian survey White/European consumers had more of an awareness of *Decoration* than the other ethnic categories. In all three surveys, female consumers were more concerned about this Motive.

Modesty Motive, formed by the indicators: *Opposite Gender, Same Gender, Brand, Body Exposure* and *Physical Adequacy*, showed a higher number of relationships when compared with the other two Motives, especially in the Chinese survey. *Body Mass* was the common variable for all three surveys, with underweight consumers assigning more importance to *Modesty*.

Table 4.76 – Cross Tabs Statistics between Motives for Fashion Clothing Consumption and Consumer Variables by Nationality

MOTIVES	Csmr-UK-2004	Csmr-BR-2004	Csmr-CN-2004
Protection	Gender Income Weight Male	Gender	
Decoration	Gender	Gender Ethnicity	Gender Body Shape Female
Modesty	Age Body Mass	Gender Age Weight Female Body Mass	Gender Age Height Male Weight Male Body Mass

The analyses of the fashion clothing consumption adapted by the Flügel's theory brought some very interesting results; it was not enough to answer the research questions however it suggested further research. Another theory discussed in the Literature Review chapter is tested in the next section: The *Four Pleasures* theory.

4.7.4 *Pleasure in Products*

The theory of *Four Pleasures*, discussed in Section 2.2.5.1 (Chapter 2), considers not only utilitarian needs but also hedonistic benefits. The *Pleasure* approach, according to the authors (Tiger, 1992; Jordan, 2000), seems to fit in with the behaviour of the new millennium consumer, especially consumers who reside in mature markets.

The model examines four types of *Pleasures*: *Physio, Socio, Psycho* and *Ideo,* the first stage of this analysis was to map the *Indicators for Fashion and Clothing Consumption* with the *Four Pleasures* theory (Table 4.77).

To combine the *Indicators* using factor analysis, the *Physio* Pleasure was linked to the consumer's senses, body system, size and body appearance. The *Physio* Pleasure, which is connected with touch, taste and smell as well as feelings of sensual pleasure found within the indicators had the following as complementary insights: *Functionality, Sensuality, Climate, Fabric, Physical Adequacy* and *Comfort.*

Social acceptance characteristics were the components of the *Socio* Pleasure in factor analysis; status, self-image, social network, labels, personality traits and lifestyle. The second *Pleasure* from Tiger/Jordan's theory is *Socio*, relating to enjoyment from relationships with other people. Society; status and image may play an important role, the *Indicators* that better fit this category are: *Fashion, Body Exposure, Moral Conventions, Opposite Gender, Same Gender, Be Noticed, Brand, Elegance* and *Age Appearance.*

The *Psycho* Pleasure aspect was comprised of the cognitive and emotional characteristics of people such as self-confidence and knowledge. In relation to the *Psycho* Pleasure, the *Indicators* chosen to blend and form this category are *Profession, Versatility, Health, Boldness, Colour, Welfare* and *Balance-Fit* as they all have a link with cognitive and emotional reactions.

Finally, values such as tastes, morals, ideologies, beliefs and aspirations were the basis for the *Ideo* Pleasure formation. This *Pleasure*, for the analysis, is composed of: *Ease-of-Care, Durability, Beauty, Attraction to Particular Clothes, Exclusivity, Quality, Taste, Personal Style* and *Price.*

Table 4.77 –Interpretation of Jordan/Tiger's Pleasures for Fashion Clothing Consumption

Jordan/Tiger's Pleasures			
Physio	**Socio**	**Psycho**	**Ideo**
Functionality	Fashion	Profession	Ease-of-Care
Sensuality	Body Exposure	Versatility	Durability
Climate	Moral Conventions	Health	Beauty
Fabric	Opposite Gender	Boldness	Attraction To Particular Clothes
Physical Adequacy	Same Gender	Colour	Exclusivity
Comfort	Be Noticed	Welfare	Quality
	Brand	Balance-Fit	Taste
	Elegance		Personal Style
	Age Appearance		Price

The second task was to measure relationships between independent and dependent Variables using statistical methods. These results are shown in the next subsection by nationality. Firstly the British results are shown, followed by the Brazilian and then the Chinese databases.

4.7.4.1 British Consumers

Factor analysis was used with the intention of reducing the quantity of variables in use and to consider an interpretation of *Pleasures* for fashion clothing consumption. The *Indicators* were blended to form the *Pleasures*, and after the procedures with SPSS software and 13 iterations, the best possible arrangement within the British databases was the following shown in Table 4.78. It is important to stress that the Cronbach' alpha coefficient was found adequate for all the four *Pleasures*, which indicates that possibly this theory is more suitable for the investigation of fashion clothing products, at least in British society. The same can be said in relation to the Barlett Test of Sphericity (BTS) and the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy, both have shown appropriated values for the factor analysis reduction.

Table 4.78 – Factor Analysis Results for Csmr-UK-2004 Interpretation of Jordan/Tiger's Pleasures for Fashion Clothing Consumption

Csmr-UK-2004			
Physio	**Socio**	**Psycho**	**Ideo**
Functionality	Fashion	Versatility	Beauty
Sensuality	Body Exposure	Boldness	Quality
Climate	Opposite Gender	Colour	Taste
Fabric	Same Gender	Welfare	Personal Style
Physical Adequacy	Be Noticed	Balance-Fit	
	Elegance		
α Cronbach = 0.55	α Cronbach = 0.56	α Cronbach = 0.59	α Cronbach = 0.51
KMO = 0.65	KMO = 0.64	KMO = 0.71	KMO = 0.62
BTS χ^2 = 113.13	BTS χ^2 = 132.97	BTS χ^2 = 106.99	BTS χ^2 = 67.22
P = 0.000	P = 0.000	P = 0.000	P = 0.000
37% of Variance explained	32% of Variance explained	38% of Variance explained	41% of Variance explained

Note: Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Carrying out the planned procedures, the *Pleasures* calculated were crossed with the *Consumer Variables*, in order to find significant relationships. The results are shown in Table 4.79 below.

Gender was the most common Variable, showing relationships with *Physio, Socio* and *Psycho* Pleasures; in all cases in the British survey, female consumers were more concerned about these than males.

White consumers are less aware about the *Ideo* Pleasure than the other ethnicities, while those consumers classified in the Other Religion category presented more awareness of the *Ideo* Pleasure. The results suggest that *Ideo* Pleasure is related to values and beliefs about the way the world should be structured, the minorities within a society clearly put more effort on its importance.

The results also highlighted that the *Income* of a consumer influences the *Physio* Pleasure, especially with affluent consumers. Possibly, the more wealthy the consumer, the more demanding he/she turns out to be, attaching greater importance to the sensorial experiences of a fashion clothing product.

Table 4.79 - Cross Tabs Pleasures by Consumer Variables in the British Survey

Csmr-UK-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE
Physio	F>M P 0.000				g 0.226 P 0.004								
Socio	F>M P 0.000					g - 0.332 P 0.000					g - 0.414 P 0.000		
Psycho	F>M P 0.000												
Ideo		OR>OC> >NR>CP P 0.000	O>W P 0.032			g - 0.178 P 0.006						g - 0.274 P 0.017	g - 0.266 P 0.010

Note: The orange cells indicates the relationship where P<= 0.05.
 The + signal indicates a positive relationship between the ordinal variables while the – signal indicates a negative relationship.
 Religion categories: NR - No Religion; CP - Christian Protestant; OC - Other Christian and OR - Other Religion
 Ethnicity categories: W – white and O – other
 Gender: F – female and M – male
Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Considering the physical variables (in light blue), relationships were found between *Body Mass* and *Socio* and *Ideo* Pleasures, greater relevance being for underweight consumers. Another correlation found is with the *Ideo* Pleasure and *Weight* for male consumers; in this case, the underweight consumer reinforced the importance of *Ideo* Pleasure. These findings suggest that the consumer is closer to the body and beauty standard and is more aware of image status and values in British society.

Continuing the planned research procedures, the next sections present the results and discussion of the Brazilian and Chinese consumer databases in relation to the theory of *Pleasures*.

4.7.4.2 *Brazilian Consumers*

The factor analysis procedures took place in the Brazilian survey in order to reduce the *Indicators* to *Pleasures,* the best results, after 15 iterations, are shown in Table 4.80. In relation to the Cronbach's alpha coefficient, it is important to highlight that for all four *Pleasures*, the figures were more than expected, higher than those from the British survey. The Barlett Test of Sphericity (BTS) and the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy have also shown very high values for the factor analysis reduction.

Table 4.80 – Factor Analysis Results for Csmr-BR-2004 Interpretation of Jordan/Tiger's Pleasures for Fashion Clothing Consumption

Csmr-BR-2004			
Physio	**Socio**	**Psycho**	**Ideo**
Functionality	Body Exposure	Versatility	Ease-of-Care
Sensuality	Same Gender	Colour	Durability
Climate	Be Noticed	Welfare	Beauty
Fabric	Elegance	Balance-Fit	Attraction To Particular Clothes
Physical Adequacy	Age Appearance		Taste
			Price
α Cronbach = 0.70	α Cronbach = 0.69	α Cronbach = 0.69	α Cronbach = 0.55
KMO = 0.73	KMO = 0.74	KMO = 0.72	KMO = 0.71
BTS χ^2 = 288.09	BTS χ^2 = 222.16	BTS χ^2 = 187.11	BTS χ^2 = 135.48
P = 0.000	P = 0.000	P = 0.000	P = 0.000
47% of Variance explained	45% of Variance explained	51% of Variance explained	32% of Variance explained

Note: Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

When running the statistics, the relationships of the *Pleasures* with the *Consumer Variables* were poor if compared with the British previously discussed (Table 4.81). The only variable that presented a significant correlation with any pleasure was *Gender*. In all cases, the female consumer seemed to be more aware than the male.

These rare results do not mean that Brazilians do not consider the *Pleasures* relevant, just that the differences within each of the *Consumer Variable* categories are possibly not so definite.

Table 4.81 - Cross Tabs Pleasures by Consumer Variables in the Brazilian Survey

Csmr-BR-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE
Physio	F>M P 0.002												
Socio	F>M P 0.000												
Psycho	F>M P 0.000												
Ideo													

Note: The orange cells indicates the relationship where P<= 0.05.
The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.
Gender: F – female and M – male
Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

It is important to highlight that the *Ideo* Pleasure did not present any correlation with the consumer profile Variables and although there were high results from the Cronbach's alpha reliability test, the *Pleasures* theory seemed not to be adequate to investigate Brazilian consumer behaviour.

The next section presents the procedures carried out in the Chinese survey, followed by a section in which the comparative analysis of the three target nationalities is presented.

4.7.4.3 Chinese Consumers

The procedures to blend the *Indicators for Fashion and Clothing Consumption* into the *Four Pleasures* were carried out with the Chinese database, resulting in the distribution shown after 16 iterations in Table 4.82 below.

In checking the reliability, it is important to highlight that the Cronbach's alpha coefficient was adequate for the *Socio* and *Psycho* Pleasures only. The *Ideo* Pleasure presented a low coefficient and the *Physio* Pleasure a lower than expected figure for exploratory research. This result suggests that possibly the four *Pleasures* is not the most adequate way to blend the *Indicators* within Chinese society. In relation to the Barlett Test of Sphericity (BTS) and the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy, both have shown appropriated values for the factor analysis reduction.

Table 4.82 – Factor Analysis Results for Csmr-CN-2004 Interpretation of Jordan/Tiger's Pleasures for Fashion Clothing Consumption

Csmr-CN-2004			
Physio	Socio	Psycho	Ideo
Sensuality	Opposite Gender	Versatility	Beauty
Climate	Be Noticed	Health	Exclusivity
Fabric	Elegance	Boldness	Quality
Physical Adequacy	Age Appearance	Colour	Taste
		Welfare	Personal Style
		Balance-Fit	
α Cronbach = 0.36	α Cronbach = 0.61	α Cronbach = 0.56	α Cronbach = 0.48
KMO = 0.60	KMO = 0.66	KMO = 0.71	KMO = 0.59
BTS χ^2 = 21.14	BTS χ^2 = 100.04	BTS χ^2 = 77.85	BTS χ^2 = 70.13
P = 0.002	P = 0.000	P = 0.000	P = 0.000
35% of Variance explained	47% of Variance explained	31% of Variance explained	34% of Variance explained

Note: Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

On the other hand, when running the cross tabs statistical tests, a large number of correlations were found between the *Pleasures* and the *Consumer Variables* (Table 4.83). *Gender*, as usual, presented relationships with *Physio*, *Socio* and *Psycho* Pleasures. In all cases, female consumers were more aware of these pleasures than males.

Within the *Ethnicity* variable, a correlation was found with the *Ideo* Pleasure, in the sense that this pleasure seemed to be most relevant to the Manchu ethnic group. This finding corroborates with the British results, indicating that the *Ideo* Pleasure is more important to minorities.

Analysing the *Age* variable, the results show that the *Socio* Pleasure is more important to younger consumers. This is an expected finding; due to pleasure having an essence of awareness in status and image. The opposite results were found in *Psycho* Pleasure, which appeared to be more relevant to older consumers, possibly due to its experienced emotional reactions.

Table 4.83 - Cross Tabs Pleasures by Consumer Variables in the Chinese Survey

Csmr-CN-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE
Physio	F>M P 0.000												
Socio	F>M P 0.003					g -0.179 P 0.049	g -0.266 P 0.048	g -0.320 P 0.017	g -0.266 P 0.048	g -0.320 P 0.017			V>O>A P 0.038
Psycho	F>M P 0.014					g 0.153 P 0.046		g -0.335 P 0.017		g -0.335 P 0.017			
Ideo			M>H P 0.014								g -0.248 P 0.032		

Note: The orange cells indicates the relationship where P<= 0.05.
The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.
Ethnicity categories: H – Han and M – Manchu
Gender categories: F – female and M – male
Body Shape categories: A, V, X and O forms for females; A, V and O forms for males
Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

The Physical Variables (in light blue) present a suggestive number of relationships with *Socio, Psycho* and *Ideo* Pleasures. Those consumers with lower measurements seemed to have more awareness of these pleasures, although the majority of Chinese consumers are naturally slimmer and shorter when compared with the other two nationalities. This finding also reinforces the pressures regarding global beauty standards.

The variable *Body Shape* for males also presented a correlation with *Socio* Pleasure. This appeared to be more important to figure "V" men, followed by "O" body figure with "A" figure last, this subtly affirms a sort of beauty standard driver within Chinese fashion consumption.

Continuing with the research aims, the next section presents a comparative analysis between the British, Brazilian and Chinese surveys in relation to the adapted *Pleasures* for fashion clothing consumption.

4.7.4.4   Consumer Comparison

The analysis in this stage of the study was the comparison of relationships between the factors (*Pleasures* for fashion clothing consumption) and the *Consumer Variables* in all British, Brazilian and Chinese surveys. Some similarities were found for all *Pleasures*, highlighting the idea that the *Gender* of the consumer shapes his/her perception of fashion clothing products (Table 4.84).

The results tend to indicate that, in general, all *Pleasures* in the British and Chinese surveys have shown at least one relationship with a body profile Variable, a tangible dimension. Less significant relationships were found with the Brazilian database which suggests that this theory is not the most adequate way to investigate differences within Brazilian society. Reviewing the reliability coefficients, it is important to stress that this theory seemed not to be adequate to blend the *Indicators* in Chinese society, although the figures were satisfactory with the British survey.

Surprising data arose with regards to *Income*, as it only appeared to be a significant factor for British consumers. UK consumers with greater disposable income tended to be more aware of the *Physio* Pleasure than those with less income. The absence of this in the Brazilian and Chinese results highlights the difference in purchasing products embodied with indicators as *Functionality*, *Sensuality*, *Climate*, *Fabric* and *Physical Adequacy*.

Table 4.84 – Cross Tabs Statistics between Pleasures for Fashion Clothing Consumption and Consumer Variables by Nationality

PLEASURES	Csmr-UK-2004	Csmr-BR-2004	Csmr-CN-2004
Physio	Gender Income	Gender	Gender
Socio	Gender Age Body Mass	Gender	Gender Age Height Female Height Male Weight Female Weight Male Body Shape Male
Psycho	Gender	Gender	Gender Age Height Male Weight Male
Ideo	Religion Ethnicity Age Weight Male Body Mass		Ethnicity Body Mass

The results indicated that the *Socio* Pleasure had similarities, especially with fashion consumption for nationals from the UK and China. Products incorporating *Fashion, Body Exposure, Opposite Gender, Same Gender, Be Noticed, Elegance* and *Age Appearance* indicators seemed to be more important to female consumers when compared with males from all the three nationalities. The physical attributes of the British and Chinese consumers appeared to influence the *Socio* Pleasure, with more intensity for the Chinese.

With the analysis of the *Psycho* Pleasure, a blend of: *Versatility, Boldness, Colour, Welfare, Health* and *Balance-Fit*, the only coincidence found was with *Gender,* all nationals, again with the tendency for it to be more important to females in comparison to males. On the other hand, this Pleasure seems to be more important to slim and short male consumers as well as older consumers from China.

The *Ideo* Pleasure, formed by a combination of *Beauty, Exclusivity, Quality, Taste* and *Personal Style*, presented some correlations with *Consumer Variables*, but only two of them coincided with the British and Chinese surveys, these were *Ethnicity* and *Body Mass*. In both countries, minorities tended to be more involved with this Pleasure, also in both, shorter and slimmer consumers were more concerned about this Pleasure in fashion clothing products. No differences between categories in the *Consumer Variables* were found, which did not show the importance of the *Ideo* Pleasure to Brazilian society.

The results also indicated that of the *Four Pleasures*, within fashion consumption, *Socio* Pleasure is the most evocative for all target nationalities. *Physio* Pleasure, in comparison with the other pleasures, seemed to be generally the least important aspect within fashion clothing consumption, but it remains important for females. An analysis of *Psycho* Pleasure revealed no relationships between consumer profiles apart from *Gender*. The importance of *Ideo* Pleasure was significantly more associated with British consumers.

Although some of the results discussed in the *Pleasures* theory showed substantial findings, this theory seemed not to be so adequate for all the nationalities. In order to clarify this, the next section presents a comparison between the results of the three surveys in contrast with the Variables adapted from the theories discussed: the Maslow's *Needs*, the Flügel's *Motives* and the Tiger/Jordan's *Pleasures*.

4.7.5   Consumer Comparison - Theories

In order to make this analysis feasible, factor analysis was used with the intention of reducing the quantity of Variables (*Indicators*) in use and to consider an interpretation of Maslow's *Needs*, Flügel's *Motives* and Tiger/Jordan's *Pleasures* for clothing fashion consumption.

For the second stage of the quantitative analysis the cross tabs of the British, Brazilian and Chinese databases between independent (consumer profile) and dependent Variables (theories) were calculated. A summary of all significant results can be seen below (Table 4.85).

The objective of this stage of the research was to check the suitablility of these theories as a way to explain consumer behaviour within fashion clothing products.

In relation to the analysis carried out with the adapted Maslow's theory, it can be said that although the reliability test has shown a set of coefficients under the expected level, the results explain a lot about consumer behaviour within fashion clothing products, especially the *Needs* of the Brazilian and Chinese populations.

When analysing the findings related to Flügel's theory, where the reliability test generally has an adequate level, the results helped to understand some crucial motivation for fashion clothing consumption, mainly for British and Brazilian societies.

Besides, the procedures carried out with the Tiger/Jordan's theory gave some important explanations which helped to identify the most important characteristics a fashion clothing product should have, in order to best satisfy consumers; this was particularly useful in terms of British and Chinese consumers.

It is important to highlight that the lack of a relationship between a *Consumer Variable* and a *Need*, a *Motive* or a *Pleasure* does not mean that there is no substantial influence of one on another, merely that the difference between categories in a Consumer Variable is not evident. As an example, the lack of a relationship with *Gender*, *Age* or *Body Mass*, may suggest that that the *Need*, the *Motive* or the *Pleasure* is not as important to that target audience, but may indicate that the *Need*, the *Motive* and the *Pleasure* is as important to men and women, younger and older, and slimmer and corpulent consumers, respectively.

Table 4.85 – Results of All Factor Analyses Cross Tabs by Nationality

NEEDS	Csmr-UK-2004	Csmr-BR-2004	Csmr-CN-2004
PHYSIOLOGICAL	Gender Education	Gender Ethnicity	Education
SAFETY	Gender	Gender Religion Ethnicity Income	Income Age Height Male Weight Male Body Mass
SOCIAL	Gender Religion Age Weight Male Body Mass	Gender Age Weight Female Body Mass	Gender Age
ESTEEM	Gender Age	Gender Weight Female Body Mass	Gender Age
SELF ACTUALISATION	Gender Age Weight Male	Gender Religion	Gender Height Male Weight Male

MOTIVES	Csmr-UK-2004	Csmr-BR-2004	Csmr-CN-2004
PROTECTION	Gender Income Weight Male	Gender	
DECORATION	Gender	Gender Ethnicity	Gender Body Shape Female
MODESTY	Age Body Mass	Gender Age Weight Female Body Mass	Gender Age Height Male Weight Male Body Mass

PLEASURES	Csmr-UK-2004	Csmr-BR-2004	Csmr-CN-2004
PHYSIO	Gender Income	Gender	Gender
SOCIO	Gender Age Body Mass	Gender	Gender Age Height Female Height Male Weight Female Weight Male Body Shape Male
PSYCHO	Gender	Gender	Gender Age Height Male Weight Male
IDEO	Religion Ethnicity Age Weight Male Body Mass		Ethnicity Body Mass

On making a comparison between theories, it can be identified that *Gender, Age and Body Shape* affects the choice of consumers in a wide variety of aspects. Among 36 crossed relationships shown in Table 4.85 above, *Gender* appeared significant 18 times (yellow marks), physical variables (*Height, Weight, Body Mass* and *Body Shape*) appeared 16 times (green marks) and *Age* appeared 14 times (blue marks).

Gender and *Age* are well known variables in a diverse field of investigation in fashion consumption. But, these research results made it clear the relevance of *Body Shape* diversity and its usefulness to the product development process. The findings showed that for consumers, figure, body volumetric and body shape all influence choice of fashion products. The results also indicated that *Body Shape* has a distinct influence on the choices made by female and male consumers.

As a final comment for further investigation, it is important to research the relationship between the *Body Shape* of the consumer and the consumption process. The fashion aesthetic standard is the so-called 'dictatorship of taller and thinner'. This concept excludes a significant number of the population from any identification with fashion trends.

Considering that the aims and objectives of this research are, among others, to answer the research questions and propose a model for better product development in fashion clothing, it is necessary to investigate the thoughts and practices of the main stakeholders involved in this process. With this in mind, the next sections present selected quantitative analyses carried out using designers (Section 4.8) and companies (Section 4.9) surveys.

4.8   DESIGNER QUANTITATIVE ANALYSIS

This section is divided into three main subsections where quantitative analysis was carried out in accordance with issues that arose from the Literature Review chapter. The designer practices and paradigms seem to be divided into three main preconceived categories in order to visualise and execute product development within the fashion clothing industry, these are: the *Artistic* perspective (Subsection 4.8.1), the *Brand* approach (Subsection 4.8.2) and the *Product* direction itself (Subsection 4.8.3). The intention is not to point out the prevalence of any of these three categories, but to investigate them in order to localise substantial points that could be further considered when building the proposal for the research questions.

Designers were asked about their attitude towards bipolar concepts extracted from theory and practice reports, they were expected to grade seven points within a semantic differential scale. Table 4.86 is compiled of the mean responses from twenty designers.

244

Table 4.86 - Semantic Differential Scale Descriptive Statistics Results for Designers

Keyword 1	Dsgn-UK-BR-CN-2005			Keyword 2
	Minimum	Mean	Maximum	
Trends	1	5.58	7	Inspiration
Large Scale	1	4.95	7	Exclusivity
Long Lasting	1	1.9	5	Disposal
Idea	1	3.7	6	Practicality
Local	1	4.8	7	Global
Market-Driven	3	4.4	7	Consumer-Driven
Social Responsibility	1	3.5	7	Business Performance
Luxury	1	3.05	6	Diffusion
Price	1	5.35	7	Quality
Body	1	4.6	7	Mind
Techno	1	4.6	7	Handmade
Psycho	1	3.5	6	Physical

As explained in the Research Methods chapter (Section 3.3.3), these bipolar concepts were posed to designers during the interviews in order to identify and measure the distinct ways in which they visualise their practice. The questions were posed as contradictory options in order to check the proximity of their practices with the theories discussed in Chapter 2 (Literature Review). The bipolar concepts were divided into three distinct areas of focus: *Artistic*, *Brand* and *Product*.

The *Artistic* focus is composed of the duality between: (A) Trends x Inspiration, derived from the Visceral and the Reflective dimensions of the Norman theory of Emotional Design (2004), discussed in Section 2.2.5.2; (B) Large Scale x Exclusivity, selected from the Roger's model of Innovation Adoption (1983), presented in Section 2.2.1; (C) Idea x Practicability, condensed from Barnard's work (2002) in which fashion has a main function of communication (Section 2.2.2) and (D) Long Lasting x Disposal, adapted from the Kaiser's concepts of Fads and Classics (Section 2.2.1).

The *Brand* direction is measured by the contrast between: (E) Local x Global, as a mention for the macro environment analysis PESTEL discussed in Section 2.2.7.1; (F) Market-driven x Consumer-driven, raised by the supply and demand sides of management direction (Section 2.2.8.1); (G) Social Responsibility x Business Performance, corresponding to esteem and exchange values, respectively, as a summary of the value analysis held by Csillag (1995) in Section 2.2.8.3 and (H) Luxury x Diffusion, as part of the discussion for Cooper and Press's work (1995), whereas design has art and marketing ingredients (Section 2.2.6).

Finally, the *Product* approach is formed by the following paradoxical concepts: (I) Price x Quality, as a way to investigate buying and consumption, two of the main stages of the Blackwell et al. model (2002) mentioned in Section 2.2.3; (J) Body x Mind, considering two of the Maslow needs (1987), respectively physiological and self-actualisation (Section 2.2.3.1); (K) Techno x Handmade, as a way to analyze Rufin's definition (1991) for technology and knowledge and intensive labour and natural resources as strategies for the production of goods, presented at Section 2.3.3 and (L) Psycho x Physical, checking two of the Pleasures conceived by Tiger/Jordan (1992/2000) as discussed in Section 2.2.5.1.

The results and subsequent analysis of the interviews carried out with designers including the three foci are presented in the subsections below.

4.8.1 *Artistic Focus*

How *Long* fashion products *Last* is a high parameter considered by designers when confronted with *Disposability* (Figure 4.29). This thought is contradictory with a fashion business that is based on waves of new products and the discarding of old ones. A short lifecycle for a product should be desirable for a market-led designer and a long lifecycle should be the best option for an artistic-led designer.

Fashion *Trends*, on the other hand, have less important parameters to be considered when compared with *Inspiration*. This result shows the individuality of the designer is prioritised over the social environment and consumer trends and the reflective practice is predominant. The inspirational approach led to a self and subjective practice, is far removed from consumer feelings and expectations.

Designers also prefer *Exclusivity* when confronted with *Large Scale*. The designers' preference for exclusivity emphasised that their position is more related to an artistic function than a business one.

246
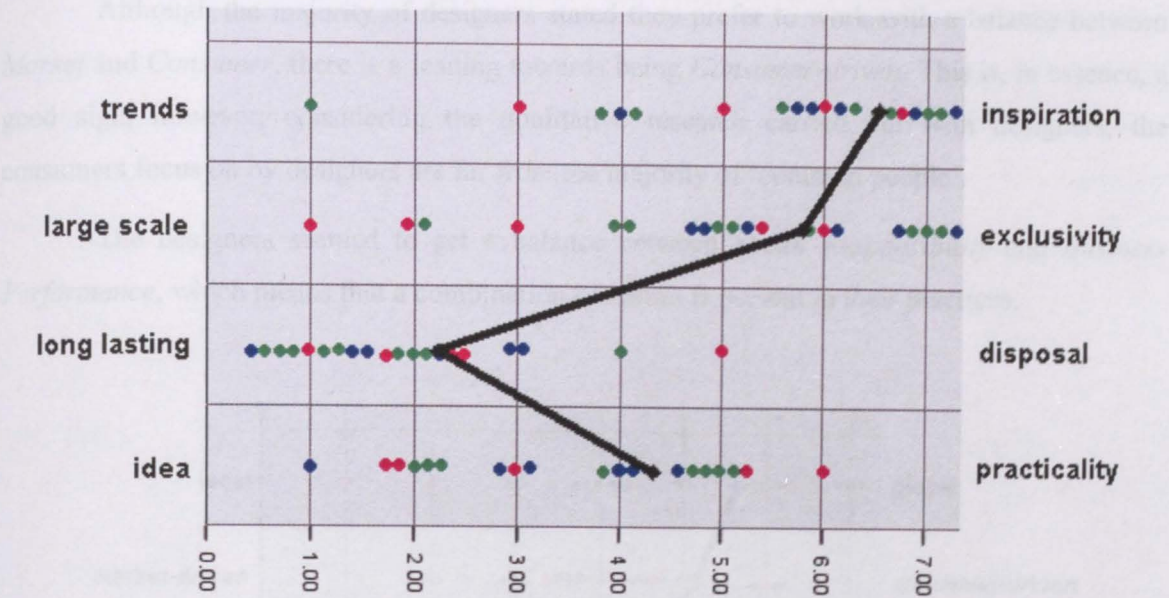
Figure 4.29 – Artistic Focus Semantic Differential Scale Results for Designers[28]

On the other hand, *Practicality* was better scored by the designers than *Idea*. Although the creative side of the professional is enhanced, their practices seemed to consider the feasibility of the production more.

Considering the tendency for designers to prefer *Inspiration*, *Exclusivity* and *Longevity*, it is important to highlight the differences in the professional from the three targeted countries. It can be seen in Figure 4.29 above, that the opinions from the Chinese designers (red dots) are very dispersed in relation to the mean point (in black), this is then followed by a lighter dispersion from the Brazilians (green dots) and a balanced position of the British designers (blue dots). This is very different to the trend in the bipolar investigation of *Idea* x *Practicality*, where the Brazilians and Chinese designer opinions were more located around the mean point.

These observations suggest that British designers practices are more coherent with a 'global' position. Similar procedures and analysis were carried out with the other two foci selected, and are presented in the next sections.

4.8.2 *Brand Focus*

Results from the designers were analysed considering the concepts chosen for investigation from *Brand* focus (Figure 4.30). The outcomes indicate that the designers were unaware of the specificities of the *Local* consumer environment, even though they were working on projects that had potential *Global* reach. Also, there was a slight preference by designers to work with *Luxury* brands rather than *Diffusion*.

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[28] The British designers are represented by blue dots, the Brazilian by green and the Chinese by red dots.

Although the majority of designers stated they prefer to work with a balance between *Market* and *Consumer*, there is a leaning towards being *Consumer-driven*. This is, in essence, a good sign, however, considering the qualitative research carried out with designers, the consumers focus on by designers are far from the majority of 'common people'.

The designers seemed to get a balance between *Social Responsibility* and *Business Performance*, which means that a combination of values is present in their practices.
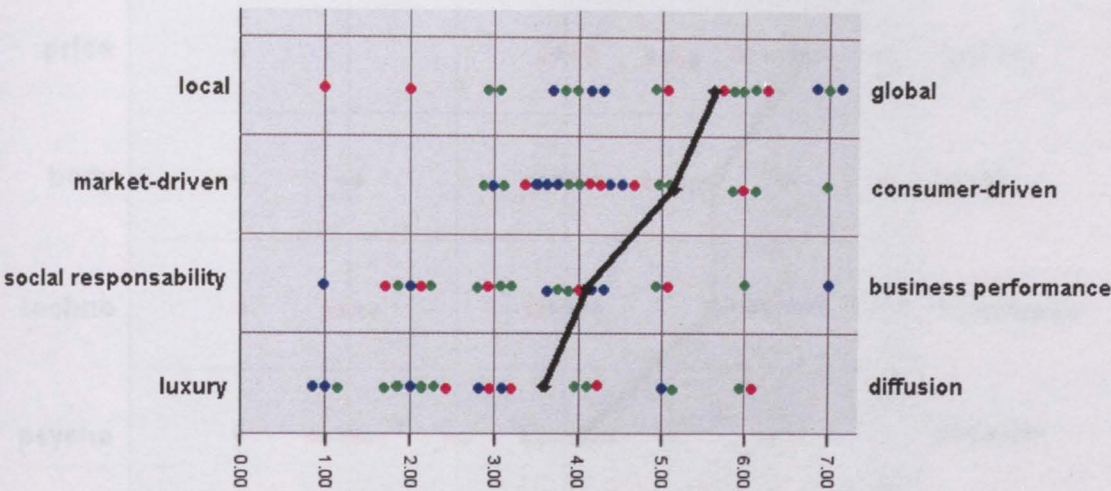
Figure 4.30 – Brand Focus Semantic Differential Scale Results for Designers[29]

When comparing the results by nationality, it is observed that there is a dispersion of viewpoints, particularly noticeable in the Brazilian survey for all bipolar concepts, although Chinese designers were also divided.

The following section presents the last of the selected focus of investigation of designer practices: the *Product*.

4.8.3 Product Focus

After the analyses of *Artistic* and *Brand* foci, the trilogy, defined by this researcher for the designer practices analysis, is complete with the analysis on *Product* focus. *Quality* is the highest ranked parameter in the product focus analysis, when confronted with *Price* (Figure 4.31). This fact shows the commitment designers have to their product, although it places them far from the reality of business, as price and cost are decision-making elements. Also by preferring *Handmade* as opposed to *Techno*, designers demonstrated their displeasure with technological processes.

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[29] The British designers are represented by blue dots, the Brazilian by green and the Chinese by red dots.

Designers attempt to satisfy the consumers' *Minds* rather than their *Bodies*, this result highlights the lack of understanding and attention that designers give to the physical characteristics and needs of the consumers. Although, it is important to highlight that when confronted with two pleasures, *Psycho* and *Physio*, designers tended to respond in a balanced way.
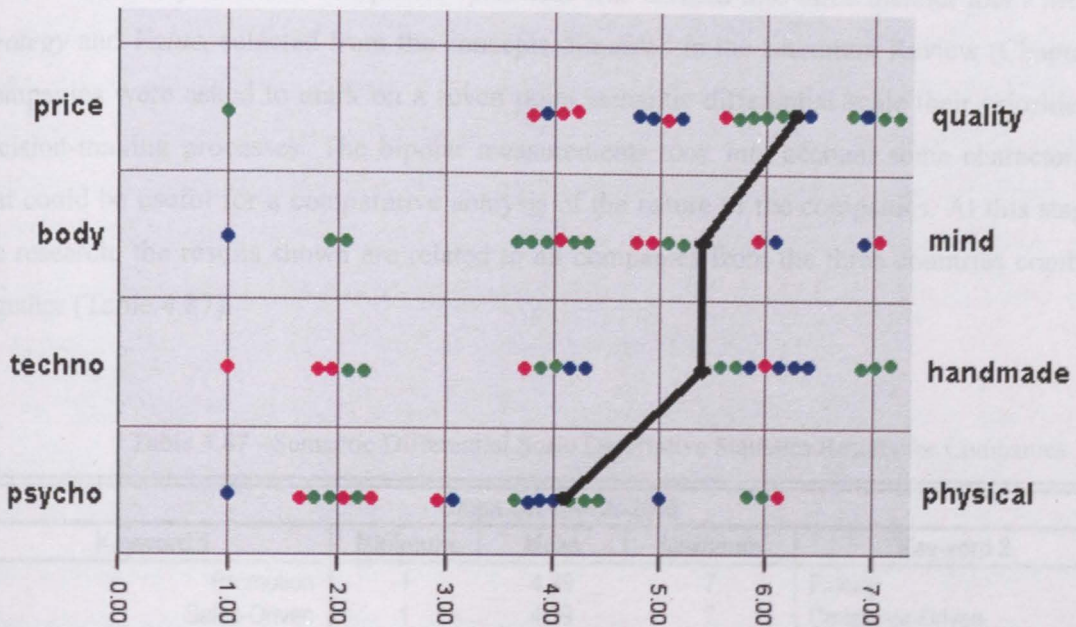
Figure 4.31 – Product Focus Semantic Differential Scale Results for Designers[30]

If a comparison of results relating to *Product* focus is made between the British isolated mean and the three surveys blended (Table 4.86), it is possible to notice that the British designer practices are closer amongst their national colleagues and nearer to balance, while there appears to be no unanimity among the national opinions of the Brazilian and Chinese designers, this can be observed in Figure 4.31.as the green and red dots are very dispersed.

On the other hand, when comparing the designers by nationalities, it can be seen that Brazilian designers were more aware of the *Body* than the British and Chinese professionals in relation to product development.

When comparing the *Technical* with the *Handmade* and *Price* with *Quality*, Chinese consumers tended to prefer product strategies that fit into higher technology and low costs.

This analysis supported the investigation in to designer practices and its interface with the fashion clothing consumer products. Designers are an important and interested actor in product development processes, although very often they need to shape themselves according to the model the company they work for pursues.

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[30] The British designers are represented by blue dots, the Brazilian by green and the Chinese by red dots.

In order to cover company's interests in product development for fashion clothing, the next section introduces the quantitative analysis carried out from the surveys with the UK, Brazilian and Chinese managers.

4.9   COMPANY QUANTITATIVE ANALYSIS

The analysis of the companies' practices was divided into three distinct foci - *Market*, *Strategy* and *Value*, selected from the concepts discussed in the Literature Review (Chapter 2). Companies were asked to mark on a seven point semantic differential scale their priorities for decision-making processes. The bipolar measurements took into account some characteristics that could be useful for a comparative analysis of the nature of the companies. At this stage of the research, the results shown are related to all companies from the three countries combined together (Table 4.87).

Table 4.87 - Semantic Differential Scale Descriptive Statistics Results for Companies

Cmpn-UK-BR-CN-2005				
Keyword 1	Minimum	Mean	Maximum	Keyword 2
Promotion	1	4.39	7	Fidelity
Sales-Driven	1	4.39	7	Consumer-Driven
Techno	1	3.28	7	Handmade
Word of Mouth	1	2.11	7	Billboards
Consumer	1	3.61	7	Market
Local	1	3.72	7	Global
Product	1	3.72	7	Production
Social Responsibility	1	4.68	7	Business Performance
Profitability	1	3.68	6	Commitment
Price	1	4.61	7	Quality
Large Scale	1	4.42	7	Exclusivity
Fair Trade	1	3.11	7	Low Cost
Long Lasting	1	2.47	7	Disposal

The investigation of the *Market* focus was based on the keywords posed as bipolar position: (A) Promotion x Fidelity, considering the differences between the act of attracting new consumers or investing in the consumers the company already have, as an allusion of vertical marketing and lateral marketing practices (Section 2.2.7.4); (B) Sales-driven x Consumer-driven, measuring the direction of the company management, from demand or from supplier (Section 2.2.8.2); (C) Techno x Handmade, in an attempt to find out a trend between companies in relation to the work of Rufin (1991) mentioned in Section 2.3.3; and (D) Word of Mouth x Billboards, with the intention to investigate the preferences in promotion, from personal sellers to advertising (Section 2.2.7.3).

The second focus, the *Strategy* chosen by the company, was analysed based on the opposition of the following keywords: (E) Consumer x Market, in order to evaluate the way the companies identify and respond to consumer needs, corroborating with the work of Cooper and Press (1995) discussed in Section 2.2.7; (F) Local x Global, as an investigation of the macro environment as elements of the PESTEL analysis (Section 2.2.7.1); (G) Product x Production, in order to rank the company proximity to a specific strategic group (Hill and Jones, 2004) from proprietary to generic goods explained in Section 2.2.8.4; (H) Social Responsibility x Business Performance, measuring the value chain, from exchange value to esteem value (Csillag, 1995; Section 2.2.8.3); and (I) Profitability x Commitment, in an attempt to assign points to the proximity the companies have with their communities, if the approach is process or inter sector as commented in Section 2.2.9.3 while discussing cluster analysis.

The *Value* focus was composed of the following keywords: (J) Price x Quality, as a adaptation of two stages from Blackwell et al.'s decision-making model (2002), discussed in Section 2.2.3; (K) Large Scale x Exclusivity, considering the Roger's model (1983) of innovation adoption explained in Section 2.2.1; (L) Fair Trade x Low Cost, in reference to the work of Abernathy et al. (1999) and the global shifts, discussed at Section 2.2.9.1; and (M) Long Lasting x Disposal, in consonance with the opposite concepts of fads and classics from the work of Kaiser (1985) explained in Section 2.2.1.

The investigation carried out was based on interviews with the managers involved in company practices and its focus was presented in the three subsequent sections below.

4.9.1 *Market Focus*

The *Market* focus analysis indicates that the companies prefer to concentrate on *Loyalty* rather than *Promotion* (Figure 4.32), this result indicates that the companies in the surveys are not planning to increase their market share. As a consequence, in order to keep their current consumers, companies are more in favour of promoting their products by network tools such as *Word of Mouth*, than by public exhibition spaces such as *Billboards*.
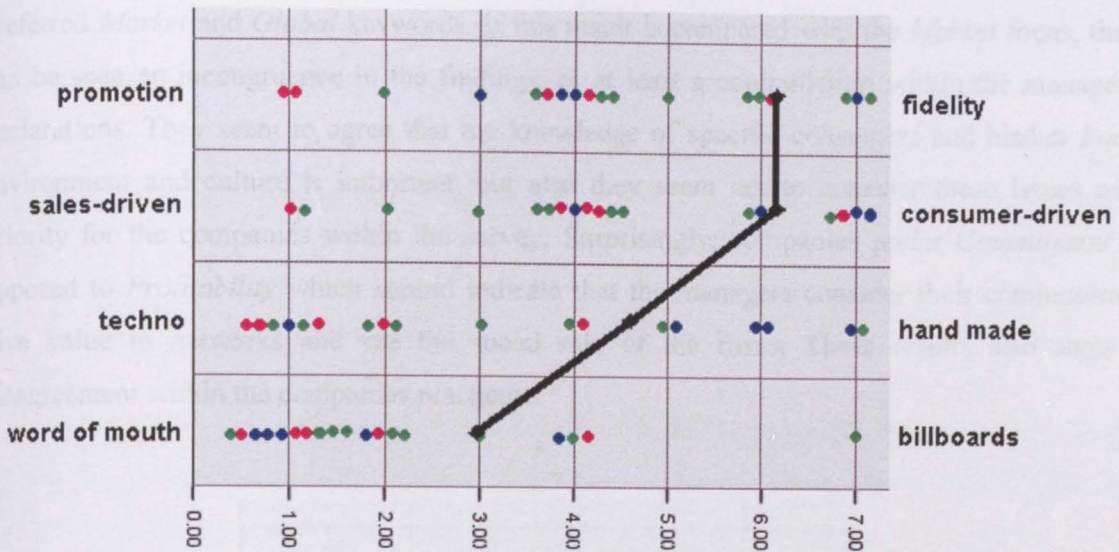
Figure 4.32 – Market Focus Semantic Differential Scale Results for Companies[31]

The companies stated that they drive their practices much closer to the *Consumer* in opposition to *Sales*, and they lightly focus their products more on the *Handmade* in contrast with the *Techno* resources.

Detailing the results by nationalities, it can be said that a dispersion of the company practices was observed mainly within the Brazilian group. The Chinese companies seem to intend to expand their market share, for *Promotion* was ranked higher than *Fidelity* as well as the Chinese companies driving their businesses closer to *Sales* figures. The vast majority of the British companies have a preference for natural resources and *Handmade* production.

The analysis of the company practices is complemented by the two foci, *Strategy* and *Value*, which are discussed in subsequent sections.

4.9.2   Strategy Focus

When analysing the *Strategy*, it seems that fashion companies have prioritised taking care of their *Business Performance*, and have not focused their efforts upon *Social Responsibility* (Figure 4.33). This outcome could explain the low level of inclusive fashion products the market offers and a misunderstanding of the value the consumers search for. Moreover, companies tend to prefer to deal with *Production* when compared to *Product*.

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[31] The British companies are represented by blue dots, the Brazilian by green and the Chinese by red dots.

The results also demonstrated that companies are removed from the *Consumer*, as they preferred *Market* and *Global* keywords. If this result is compared with the *Market* focus, there can be seen an incongruence in the findings, or at least a contradiction within the manager's declarations. They seem to agree that the knowledge of specific consumers and his/her *Local* environment and culture is important, but also they seem not to consider these issues as a priority for the companies within the survey. Surprisingly, companies prefer *Commitment* as opposed to *Profitability* which should indicate that the managers consider their communities, give value to networks and see the social role of the firms. These results also show a disagreement within the companies practices.
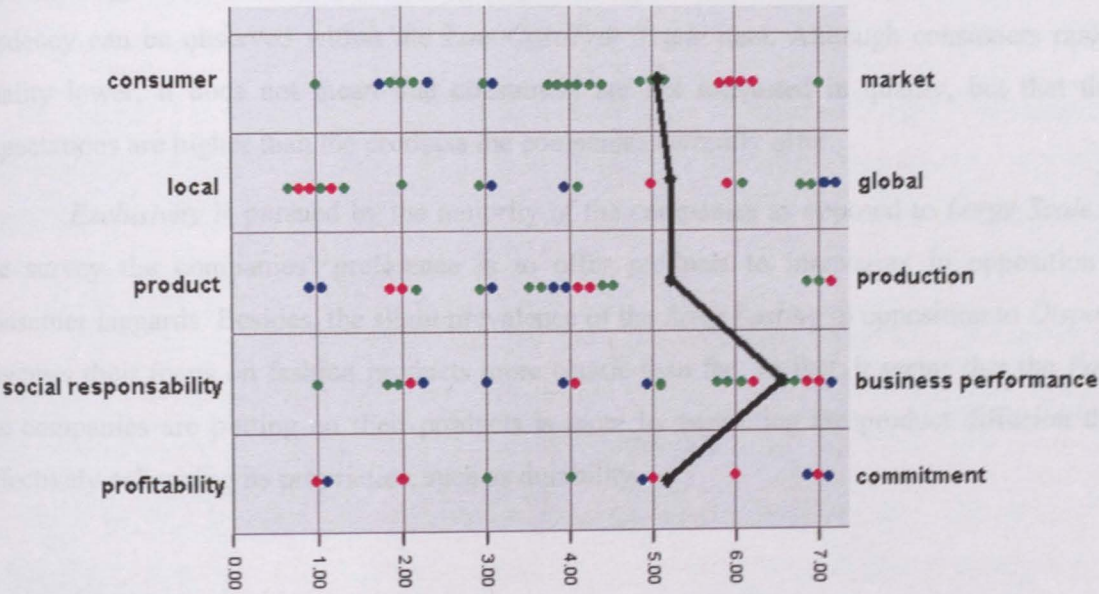
Figure 4.33 – Strategy Focus Semantic Differential Scale Results for Companies[32]

In evaluating the companies' results by nationality, it was observed that the British companies presented a dispersion of opinions in the majority of the bipolar keywords, except the ones relating to *Product* and *Consumer* in opposition to *Production* and *Market* respectively.

The Brazilian companies, on the other hand, showed a tendency to balance their actions between *Profitability* and *Commitment*, as well as between *Consumer* and *Market*. The greater preference of this national group came from the opposition of *Social Responsibility* and *Business Performance*, with a prevalence of the latter keyword.

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[32] The British companies are represented by blue dots, the Brazilian by green and the Chinese by red dots.

The Chinese managers presented a clear preference for *Market* as opposed to the *Consumer* although they also stated a preference to *Local* instead of the *Global*. This result seems to show some misunderstanding of the strategic management theories.

Considering the last focus planned for this research, next section presents the analysis relating to the *Value* approach within companies.

4.9.3   *Value Focus*

In relation to the *Value* focus analysis, companies within the survey demonstrated their priority in *Quality* rather than to *Price* (Figure 4.34). On the other hand, a slightly reverse tendency can be observed within the *Low Cost/Fair Trade* item. Although consumers ranked quality lower, it does not mean that consumers are not interested in quality, but that their expectations are higher than the products the companies currently offer.

Exclusivity is pursued by the majority of the companies as opposed to *Large Scale*. In the survey the companies' preference is to offer products to innovators in opposition to consumer laggards. Besides, the slight prevalence of the *Long Lasting* in opposition to *Disposal* suggests their focus on fashion products more classic than fad. In fact, it seems that the *Value* the companies are putting on their products is more by restricting the product diffusion than effectively enhancing its proprieties, such as durability.

Figure 4.34 – Value Focus Semantic Differential Scale Results for Companies[33]

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[33] The British companies are represented by blue dots, the Brazilian by green and the Chinese by red dots.

When comparing the managers' opinions by nationality, British companies tended to focus their *Value* mostly in *Exclusivity*, *Long Lasting* and *Fair Trade* practices as opposed to keywords such as *Large Scale*, *Disposal* and *Low Cost* respectively.

A detailed analysis of the Brazilian companies' behaviour showed that there was a balanced concentration between *Price* and *Quality*. Further more, it can be observed in the Brazilian survey a slight tendency of the prevalence of *Fair Trade* and *Long Lasting*, as opposed to *Low Cost* and *Disposal* keywords.

In relation to the Chinese companies' practices, it can be said that they tend to focus more on *Quality* than *Price*, and more on *Fair Trade* than *Low Cost*. The latter sounds incongruent if compared with the profile they had in the previous subsection, where the *Strategy* focus was discussed.

Although the companies have stated they are in good financial health, their choices of focus such as *Market*, *Strategy* and *Value* seem to be incoherent when compared to each other. It appears to be necessary to consider these inconsistencies when modelling a tool to support the development of fashion clothing products.

When comparing the results of the three stakeholders: consumers, designers and companies, it would appear to be necessary to find a model that can be understood by all, as well as satisfying their distinct needs, views and requirements for a better integration.

With this in mind, two main considerations should be taken into account: (1) the *Indicators for Fashion and Clothing Consumption* are crucial for the understanding of consumer needs and expectations, although none of the methods and analysis carried out were enough to substantiate a conclusion and further suggestions for the implementation of a new model for consumer analysis in fashion clothing; (2) it is necessary, after testing theories of consumption, motivation and design, to check the suitability of a management theory in order to help in the conception of a supportive model for the development of fashion clothing products.

The next sections present a quali-quantitative analysis carried out with all *Indicators for Fashion and Clothing Consumption*, in an attempt to discover their hierarchical sequence. The *Means-End Chain Model* (Gutman, 1982) was used to build this exploratory research by content analysis methods, to give support for subsequent quantitative analysis.

The next section (4.10) introduces the consumer analysis using the laddering technique known as part of the *Means-End Chain Model* (Gutman, 1982), with the hierarchical cognitive map (4.10.1) and the *Attributes*, *Consequences* and *Values* analysis by nationality (4.10.2). Subsequently, the analysis considers the designer databases (Section 4.11) and finally, the company surveys are investigated using the same quali-quantitative method as in Section 4.12.

4.10   CONSUMER QUALI-QUANTITATIVE ANALYSIS

Using the *Means-End Chain Model*, the following analysis is composed of two distinct stages and linked with two distinct methods of analysis: the hierarchical map built and a comparative study of the *Indicators for Fashion and Clothing Consumption* from the point of view of consumers from the three countries.

The hierarchical map is mainly a qualitative method, using answers from the open questions posed to consumers. The comparison tasks involve a quantitative analysis, as the *Indicators* were measured by the degree of importance. In these analysis's it is important to mention that all consumers tend to maximize the degree of importance they give to an *Indicator*, which makes these comparisons well balanced.

4.10.1 *Hierarchical Cognitive Map*

The theory of the *Means-End Chain Model* (Gutman, 1982) seemed to be appropriate for qualitative classifying of the *Indicators for Fashion and Clothing Consumption*, the *Means-End Chain Model* theory is a way of systematically representing the hierarchy. As explained in Section 3.5.3 in Chapter 3, the first level is comprised of the *Attributes* (A), which are the characteristics, components and parts of a product. The following level of the hierarchy is dedicated to the *Consequences* (C) of these *Attributes*; the way consumers will benefit from the products. The *Consequences* are more subjective and the results can be positive or negative. At the top of the chain are the *Values* (V), which give the direction of the model and represent the aims of the consumers (Reynold and Gutman, 1984; Woodruff and Gardial, 1996).

The levels represent many factors from the physical aspects of a product to personal values related to it. This technique offers a better understanding of the consumer's rationale behind his/her feelings towards the product. The technique can help measure the relevance that a consumer gives to a product in relation to his/her life as well as its functional properties. The theory is based on the supposition that consumers see 'products as means to important ends' (Mulvey et al., 1994).

The most common way to achieve a *Means-End Chain Model* analysis is by using the laddering technique, it is known as a tool to describe a cognitive structure of a person or groups, mainly based on individual interviews (in this research, it took the form of open questions in the questionnaires, as well as the presented in the *Indicators* measurement). Laddering is an effective method of analysing simultaneously all aspects of consumer behaviour affecting product choice.

Although Gutman's theory is based on consumers' spontaneous response, in this work the *Indicators* were supplied giving the consumer opportunity to add new *Indicators* relating to their consumption process. One of the main reasons for this was the size of the surveys in which individual responses were less feasible.

The laddering data analysis process is comprised of four stages: (1) content analysis; (2) the implication matrix development; (3) the hierarchical value map construction and (4) the dominant perceptual orientation determination.

The content analysis stage is the one where the result is a set of elements related in a sequence A-C-V, expressing the reasoning of the consumer in relation to *Attributes*, *Consequences* and *Values*. The role of the researcher is very important and intensive as all the other phases will be based on these analysis's.

The following phase, the implication matrix development, is comprised of actions to transfer all results from the early stage into a matrix of rows and columns using numeric codification. At this moment, the aggregate of presence/absence of relationship is carried out as well as an incorporation of a blend of qualitative and quantitative methods.

The construction of the hierarchical value map offers a visualisation of the direct and indirect relationship between elements. Normally, not all the relationships are shown but only the ones higher than the cut off point established by the researcher. The process is based on the structure of *Means-End Chain* in order to facilitate the interpretation of the data.

The last stage of the process is the determination of the dominant perceptual orientation *Means-End* chains. From the base elements (*Attributes*) to the top ones (*Values*), the numbers of internal relationships are ranked and the chains with the higher score are considered to be the most important. As the scope of this research relates to a broad approach towards inclusivity, this stage was not considered appropriate.

As a crucial phase within the *Means-End Chain* model analysis, the hierarchical cognitive map for fashion clothing consumption was built, with the use of content analysis, in order to explain the relationship between the *Indicators for Fashion and Clothing Consumption* as shown in Figure 4.35. The bottom band (yellow) contains the *Indicators* classified as *Attributes*, the middle band (green) presents the *Indicators* that fit in the *Consequences* category and the top band (blue) is related to the *Indicators* that better explain the *Values* according to Gutman's work (1982).
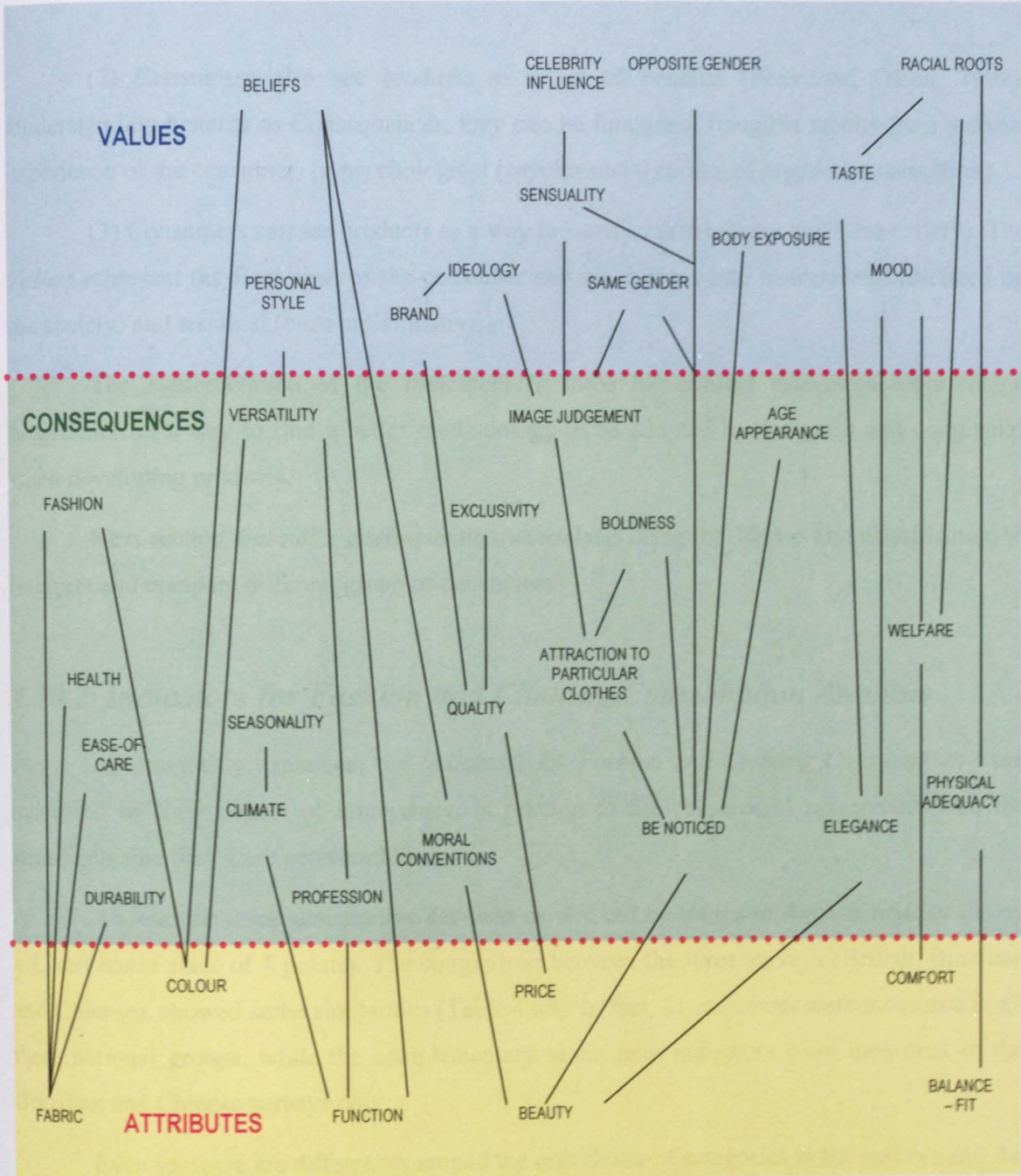
Figure 4.35 - Hierarchical Value Map for Fashion Clothing Consumption

To explain better the appropriateness of this method to understand the way consumers face fashion clothing products, it is important to stress:

(1) Consumers see products as a set of *Attributes* (Peter and Olson, 1999). The *Attributes* can be classified into concrete (physical, tangible) and abstract (emotional, intangible).

(2) Consumers also see products as a set of benefits (Peter and Olson, 1999). Understanding benefits as *Consequences*, they can be functional (tangible results from a direct experience of the consumer) or psychological (psycho-social results of product consumption).

(3) Consumers can see products as a way to satisfy *Values* (Peter and Olson, 1999). The *Values* represent the final aims of the consumer and are divided into instrumental (dictated by the society) and terminal (built individually).

The agglomeration of the *Indicators* in three hierarchical categories represents a progression in a way to find a better methodology to be adopted by designers and companies when developing products.

Next section presents a quali-quantitative analysis using the *Means-End* classification to interpret and compare different group of consumers.

4.10.2 *Indicators for Fashion and Clothing Consumption Analysis*

As previously explained, the *Indicators for Fashion and Clothing Consumption* were measured by their degree of importance, in relation to the consumers' agreements with the statements that they were generated from.

An analysis using quantitative data was carried out by means of these *Indicators* (using a Likert based scale of 4 points). The comparison between the three surveys (British, Brazilian and Chinese), showed some similarities (Table 4.88). In fact, 31 indicators were measured in all three national groups, while the complementary seven new indicators were measured in the Brazilian and Chinese surveys only.

Even so, there are differences around the prevalence of categories in the surveys and the ten highest means were almost solely from the same indicators. *Welfare* was the most important, followed by *Physical Adequacy* and *Balance. Functionality, Colour, Be Noticed, Versatility* and *Age Appearance* appear as the following highest means.

This result can suggest that there is no one unique segment to be prioritised when offering fashion clothing products to consumers, individual aspects, as well as social and physical seem to have a balanced importance in the consumer choice.

Table 4.88 – Comparison of the Indicators for Fashion and Clothing Consumption Ranked by Grade of Agreement Means within the British, Brazilian and Chinese Consumer Surveys

Csmr-UK-2004 N=264	Mean	Csmr-BR-2004 N=320	Mean	Csmr-CN-2004 N=227	Mean
Welfare	3.72	Welfare	3.69	Physical Adequacy	3.72
Colour	3.49	Physical Adequacy	3.68	Balance-Fit	3.58
Physical Adequacy	3.46	Colour	3.62	Welfare	3.58
Balance-Fit	3.34	Purpose of Clothes	3.58	Seasonality	3.56
Versatility	3.33	Balance-Fit	3.56	Purpose of Clothes	3.50
Age Appearance	3.32	Climate	3.51	Colour	3.46
Purpose of Clothes	3.32	Be Noticed	3.44	Be Noticed	3.45
Be Noticed	3.29	Age Appearance	3.43	Age Appearance	3.43
Moral Conventions	3.17	Beauty	3.37	Versatility	3.42
Price	3.16	Versatility	3.33	Elegance	3.36
Elegance	3.15	Price	3.29	Boldness	3.32
Fabric	3.11	Ease-of-Care	3.23	Opposite Gender	3.31
Sensuality	3.11	Fabric	3.21	Health	3.24
Climate	3.08	Seasonality	3.17	Price	3.21
Boldness	3.00	Taste	3.14	Sensuality	3.18
Body Exposure	3.00	Comfort	3.13	Fashion	3.18
Taste	2.86	Opposite Gender	3.01	Ease-of-Care	3.14
Attraction to Particular Clothes	2.85	Durability	3.01	Taste	3.09
Ease-of-Care	2.85	Elegance	3.00	Comfort	3.04
Comfort	2.81	Same Gender	2.90	Exclusivity	3.00
Durability	2.66	Sensuality	2.87	Ideology	2.97
Opposite Gender	2.65	Body Exposure	2.77	Climate	2.87
Fashion	2.54	Mood	2.77	Beauty	2.87
Personal Style	2.35	Boldness	2.67	Fabric	2.85
Quality	2.31	Exclusivity	2.67	Mood	2.84
Beauty	2.29	Image Judgement	2.65	Quality	2.69
Same Gender	2.26	Health	2.49	Attraction to Particular Clothes	2.67
Health	2.16	Attraction to Particular Clothes	2.40	Celebrity Influence	2.62
Profession	2.05	Racial Roots	2.22	Same Gender	2.62
Exclusivity	2.02	Quality	2.22	Body Exposure	2.62
Brand	1.76	Personal Style	2.21	Profession	2.58
Celebrity Influence*	N/A	Fashion	2.18	Moral Conventions	2.56
Racial Roots*	N/A	Moral Conventions	2.05	Durability	2.52
Ideology*	N/A	Profession	1.82	Image Judgement	2.42
Image Judgement*	N/A	Ideology	1.75	Brand	2.34
Mood*	N/A	Celebrity Influence	1.71	Personal Style	2.26
Beliefs*	N/A	Beliefs	1.59	Beliefs	2.05
Seasonality*	N/A	Brand	1.53	Racial Roots	1.98

* Not asked to UK-2004 consumer survey.

Reviewing this and looking at the bottom rows of the table, it is possible to observe that *Profession* and *Brand* are in the lowest section of means. Although *Profession* is an important *Indicator* for a part of the society, in general, it seems not to be a guideline in terms of dress code. Surprisingly, the indicator *Fashion* is not as important to the British and Brazilians as it appeared to be to Chinese consumers. A reason for this could be the recent introduction of fashion values in to Chinese society, while in the other two countries there is something more colloquial.

The crucial differences in the three nationals' choices for fashion clothing consumption are concentrated between the tenth and the twenty-fifth places in the table of means (grey area).

Elegance seemed to be more important to British and Chinese consumers when compared with the Brazilians, although the location of this *Indicator* if is not in the grey area is immediate in the Chinese case.

Climate as an *Indicator* is not so important to British and Chinese consumers, although for Brazilians it is located as the sixth most important. This result possibly indicates that the abrupt changes of temperature between exterior and interior are really uncomfortable for Brazilians, and the choice of appropriate clothing can help on the attenuation of this.

Chinese consumers seem to have less awareness of *Body Exposure* than British and Brazilians. Possibly, the consideration of the power of the body as a means for communication is higher in Western societies than in the East.

The indicator *Price* was ranked higher for British consumers, followed by the Brazilians, and being less important to Chinese consumers. Although the luxury European items are more expensive in Asia, the cost of an ordinary piece of clothing is considerably cheaper.

When looking at *Gender*, the *Opposite Gender* appeared to be more important to Chinese consumers than the other two nationalities, this finding suggests that clothing can help to impress a partner from the East as well. In relation to the *Same Gender* indicator, the higher awareness came from the Brazilians consumers, probably because Brazil is known for being a competitive society, this finding can explain the 'run to be the best' among Brazilian groups of friends. In accordance with the just related, the indicator *Beauty* was ranked higher by Brazilian consumers.

Health is an *Indicator* that appeared to be more important to Chinese consumers, followed by Brazilians and then by British. Culturally the Asian society is more preventive than curative, using herbs and meditation prior to medicines and hospitals, which can explain this tendency. Brazilians, due to their blended roots, especially indigenous and African, consider a lot of popular potions when treating any health issues.

As these analysis's, although very important, are not so objective to be applied by industry, this is due to their diversity, some analysis considering the *Indicators* as clusters of the *Means-End Chain* segments were carried out.

A comparison among the three nationalities is shown in Figures 4.36; 4.37 and 4.38, based on the *Means-End Chain Model*. As observed, British consumers seem to regard *Values* as the most important, while Brazilians emphasize the importance of *Attributes*. Where as Chinese consumers, *Consequences* is the most desired dimension within the chain.
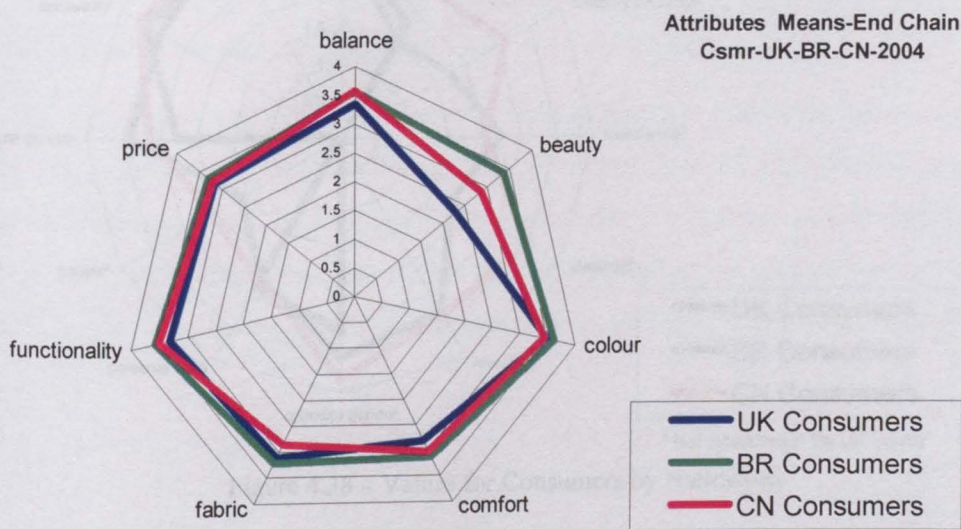
Figure 4.36 – Attributes for Consumers by Nationality

Consequences Means-End Chain
Csmr-UK-BR-CN-2004

* Not measured in the UK Survey
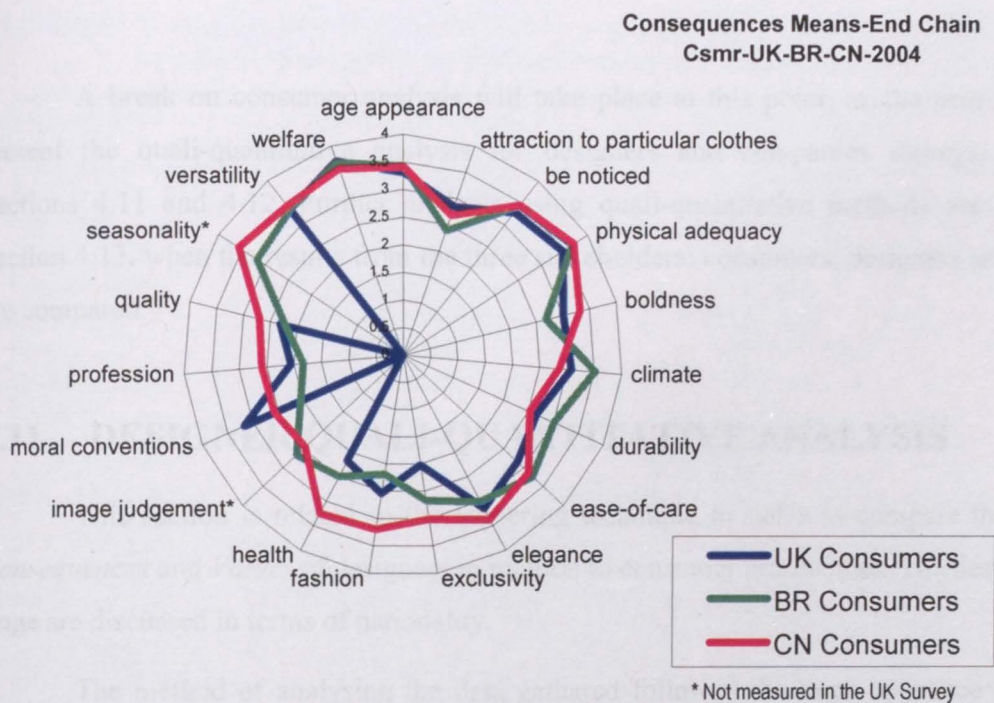
Figure 4.37 – Consequences for Consumers by Nationality

Values Means-End Chain
Csmr-UK-BR-CN-2004

* Not measured in the UK Survey
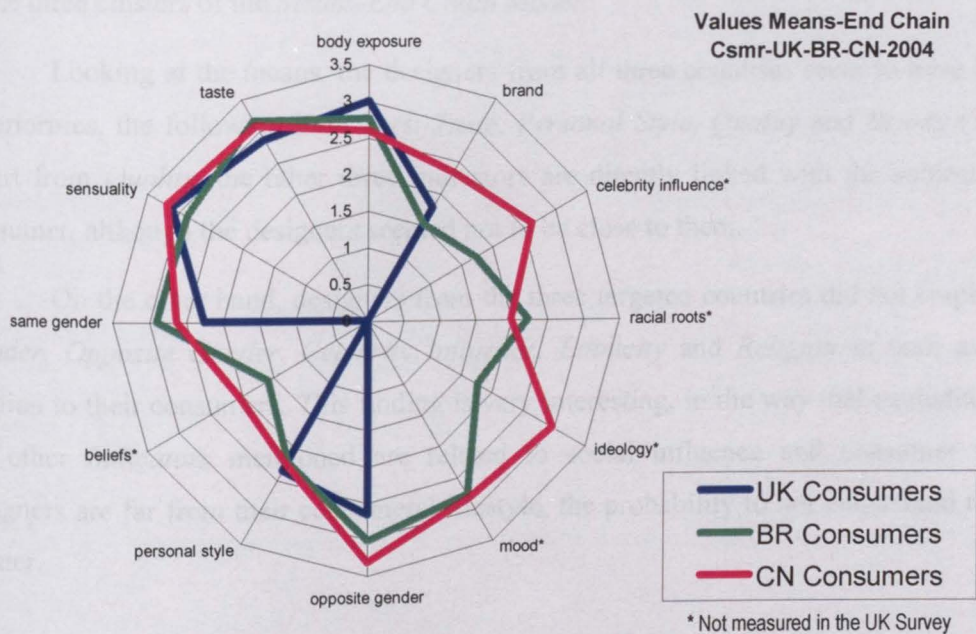
Figure 4.38 – Values for Consumers by Nationality

A new stage of the research is finished at this point, with the interpretation of the *Indicators for Fashion and Clothing Consumption* and their comparison by national groups. The analysis firstly was carried out considering the means rank of the *Indicators* and lately as clusters associated with the *Means-End Chain (ACV)* position.

A break on consumer analysis will take place at this point, as the next sections will present the quali-quantitative analysis for designers and companies surveys, respectively Sections 4.11 and 4.12. Further analysis using quali-quantitative methods are presented in Section 4.13, when the results from the three stakeholders: consumers, designers and companies are compared.

4.11   DESIGNER QUALI-QUANTITATIVE ANALYSIS

This section is related to the laddering technique in order to compare the *Attributes*, *Consequences* and *Values* of designers in relation to consumer preferences. The designers at this stage are discussed in terms of nationality.

The method of analysing the data gathered followed the same sequence used for the analysis of consumer surveys: firstly, a general comparison between designers understanding of the *Indicators'* importance for consumers, and then a comparison by splitting the *Indicators* in to the three clusters of the *Means-End Chain Model*.

Looking at the means, the designers from all three countries seem to have in common, as priorities, the following indicators: *Taste*, *Personal Style*, *Quality* and *Beauty* (Table 4.89). Apart from *Quality*, the other three indicators are directly linked with the subjectivity of the consumer, although the designers seemed not to be close to them.

On the other hand, designers from the three targeted countries did not emphasize *Same Gender*, *Opposite Gender*, *Celebrity Influence*, *Ethnicity* and *Religion* in their awareness in relation to their consumers. This finding is very interesting, in the way that excluding *Ethnicity*, the other *Indicators* mentioned are related to social influence and consumer lifestyle. If designers are far from their consumers' lifestyle, the probability to not understand their need is greater.

Table 4.89 - Comparison of the Indicators for Fashion and Clothing Consumption Ranked by Grade of Agreement Means within the British, Brazilian and Chinese Designer Surveys

Dsgn-UK-2005 N=6	Mean	Dsgn-BR-2005 N=9	Mean	Dsgn-CN-2005 N=5	Mean
Balance-Fit	4.80	Beauty	4.78	Comfort	4.40
Fashion	4.67	Elegance	4.67	Welfare	4.40
Fabric	4.50	Personal Style	4.67	Personal Style	4.40
Personal Style	4.50	Comfort	4.56	Taste	4.40
Quality	4.33	Durability	4.44	Beauty	4.20
Beauty	4.17	Colour	4.44	Seasonality	4.20
Be Noticed	4.17	Welfare	4.33	Health	4.00
Taste	4.17	Taste	4.33	Quality	4.00
Boldness	4.17	Fabric	4.22	Colour	4.00
Sensuality	4.00	Quality	4.11	Ideology	4.00
Colour	4.00	Exclusivity	4.11	Age Appearance	3.80
Attraction To Particular Clothes	4.00	Balance-Fit	4.00	Mood	3.80
Durability	3.83	Boldness	4.00	Profession	3.60
Exclusivity	3.83	Functionality	3.89	Fabric	3.60
Mood	3.83	Versatility	3.89	Balance-Fit	3.60
Seasonality	3.83	Attraction To Particular Clothes	3.89	Versatility	3.60
Climate	3.67	Age Appearance	3.78	Functionality	3.40
Comfort	3.67	Be Noticed	3.78	Ease-of-Care	3.40
Elegance	3.67	Seasonality	3.78	Boldness	3.40
Brand	3.67	Ideology	3.67	Climate	3.20
Functionality	3.50	Fashion	3.56	Moral Conventions	3.20
Physical Adequacy	3.50	Price	3.44	Durability	3.20
Versatility	3.50	Brand	3.44	Physical Adequacy	3.20
Price	3.40	Ease-of-Care	3.33	Fashion	3.20
Age Appearance	3.33	Mood	3.33	Elegance	3.20
Ideology	3.33	Climate	3.22	Be Noticed	3.20
Profession	3.17	Body Exposure	3.22	Exclusivity	3.20
Welfare	3.00	Image Judgement	3.22	Price	3.00
Body Exposure	3.00	Health	3.11	Brand	3.00
Same Gender	3.00	Sensuality	3.11	Attraction to Particular Clothes	3.00
Ease-of-Care	2.83	Profession	3.00	Same Gender	2.80
Opposite Gender	2.83	Physical Adequacy	2.89	Body Exposure	2.40
Moral Conventions	2.50	Celebrity Influence	2.67	Opposite Gender	2.40
Image Judgement	2.50	Same Gender	2.56	Racial Roots	2.40
Celebrity Influence	2.33	Opposite Gender	2.44	Sensuality	2.20
Health	2.17	Moral Conventions	2.22	Image Judgement	2.20
Racial Roots	2.00	Racial Roots	1.67	Celebrity Influence	1.80
Beliefs	1.67	Beliefs	1.33	Beliefs	1.80

Comparing the data gathered from consumers (Table 4.88) and the data picked out from the designers (Table 4.89, above), some comments about their divergence of opinion can be made. In the United Kingdom, while the consumers highly rated *Price* and rated *Quality* low, the opposite opinion was the case for the designers. The Brazilian surveys showed divergences of importance given by consumers and designers, especially for *Climate* and *Elegance*. Although the Chinese consumers and designers seemed to be closer in opinion, which meant that designers knew more about their consumers, some differences appeared for *Durability* and *Elegance*.

Focusing on the investigation of a method to help designers to get closer and know more about their consumers, an analysis using the *Means-End Chain* was carried out. The intention is to summarize the *Indicators* in least categories, clustering them into *Attributes*, *Consequences* and *Values*.

When analysing the *Means-End Chain*, for British designers *Balance-Fit* seems to be the most important indicator in the *Attributes* category while *Beauty* tended to be top for Brazilians and *Comfort* for the Chinese designers. It is important to stress that designers from China ranked all the attributes lower than their colleagues from the UK and Brazil (Figures 4.39; 4.40 and 4.41).
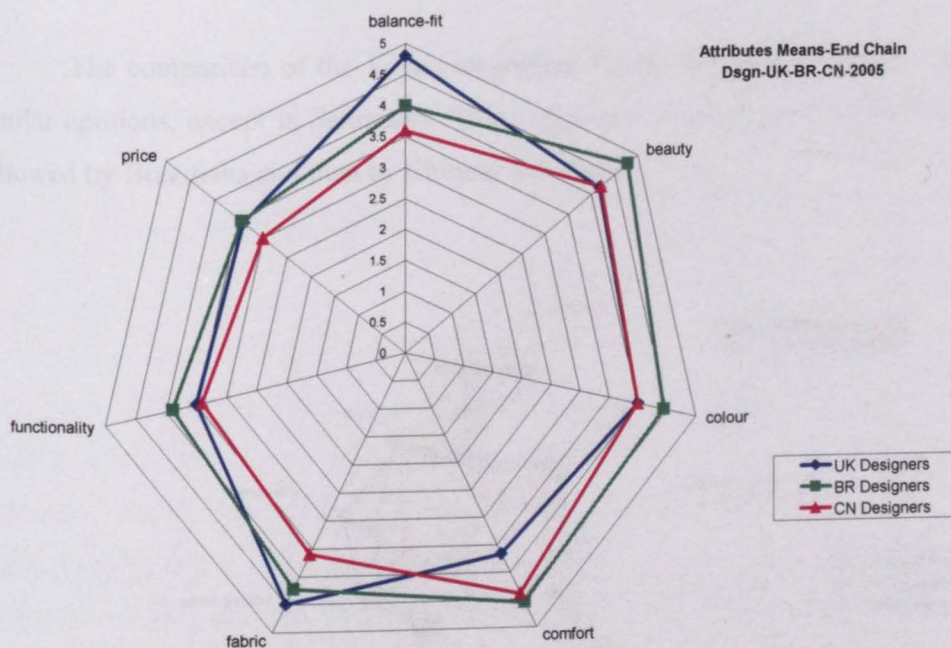
Figure 4.39 – Attributes for Designers by Nationality

In the *Benefits* category, *Fashion* and *Quality* are the most important elements for British designers; *Elegance* and *Durability* for Brazilians; and *Welfare, Seasonality* and *Health* for Chinese designers. Great discrepancies were observed between the opinions of the designers from the three countries in relation to the components of the *Consequences* category.
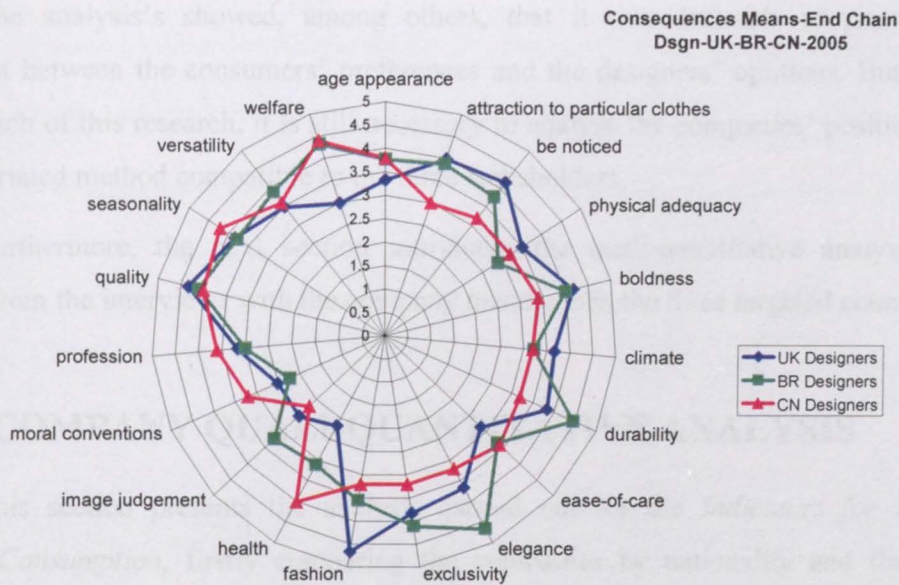
Figure 4.40 – Consequences for Designers by Nationality

The comparison of the *Values* awareness among the designers showed that they share similar opinions, except in *Sensuality*. This component is most important for British designers, followed by Brazilians and then by Chinese designers.
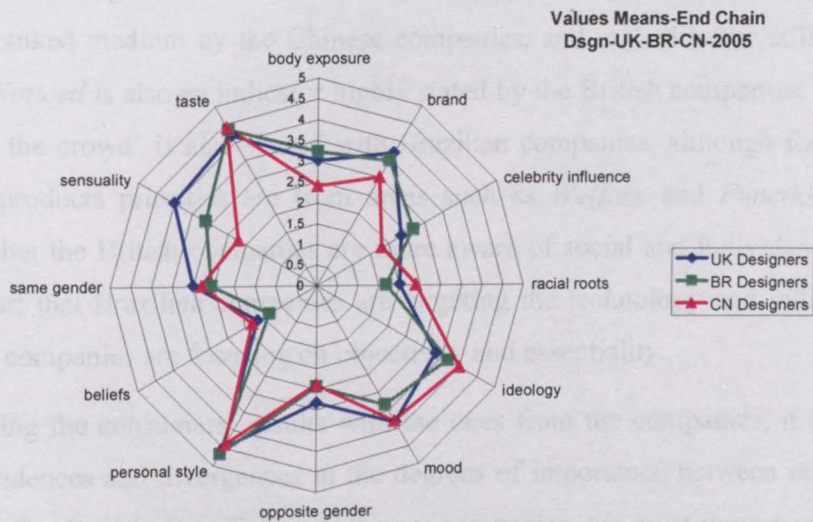
Figure 4.41 – Values for Designers by Nationality

The analysis's showed, among others, that it was desirable to promote a better adjustment between the consumers' preferences and the designers' opinions. But, considering the approach of this research, it is still necessary to analyse the companies' position to find out an appropriated method compatible to the three stakeholders.

Furthermore, the next section introduces the quali-quantitative analysis with data gathered from the interviews with the company managers in the three targeted countries.

4.12 COMPANY QUALI-QUANTITATIVE ANALYSIS

This section presents the analysis carried out for the *Indicators for Fashion and Clothing Consumption*, firstly comparing the companies by nationality and then using the *Means-End Chain Model* to compare companies and consumers.

The analysis of the similarities and differences between the British, Brazilian and Chinese companies in relation to the *Indicators for Fashion and Clothing Consumption* was carried out by using the means.

Companies were asked to mark on a five point Likert scale, the degree of importance they gave to their products in relation to the *Indicators in Fashion and Clothing Consumption*.

Fashion is the highest indicator ranked by the British companies while vogue and trends elements were ranked medium by the Chinese companies, and ranked lower still by Brazilian companies. *Be Noticed* is also an indicator highly stated by the British companies. The action to 'stand out from the crowd' is also shared with Brazilian companies, although for the Chinese companies the products priorities are from areas such as *Welfare* and *Functionality*. These results suggest that the British companies are more aware of social and individual aspects as a competitor factor; that Brazilian companies are targeting the technology and individual issues and the Chinese companies are focusing on objectivity and essentiality.

Comparing the consumers' results with the ones from the companies, it is possible to find some coincidences and divergences in the degrees of importance between companies and their consumers. For British, Brazilian and Chinese companies, the most important *Indicator* in common is *Balance-Fit* (Table 4.90), which is compatible with one of the highest rated *Indicators* for consumers (Table 4.88). On the other hand, for companies, *Quality* is one of the most important indicators, it was not presented as highly with consumers. A similar result is observed with the indicator *Brand* within the British companies, it seems that companies are putting their energy into *Indicators* that are not the most significant for consumers.

268

Table 4.90 – Comparison of the Indicators for Fashion and Clothing Consumption Ranked by Grade of Agreement Means within the British, Brazilian and Chinese Company Surveys

Cmpn-UK-2005 N=6	Mean	Cpmn-BR-2005 N=9	Mean	Cpmn-CN-2005 N=5	Mean
Fashion	4.50	Balance-Fit	4.78	Welfare	4.20
Be Noticed	4.50	Be Noticed	4.56	Functionality	4.00
Balance-Fit	4.25	Physical Adequacy	4.44	Fabric	4.00
Beauty	4.25	Age Appearance	4.33	Physical Adequacy	4.00
Brand	4.25	Quality	4.33	Age Appearance	3.80
Comfort	4.20	Colour	4.33	Comfort	3.80
Quality	4.00	Functionality	4.22	Balance-Fit	3.80
Fabric	4.00	Welfare	4.22	Seasonality	3.80
Colour	4.00	Beauty	4.22	Quality	3.60
Personal Style	4.00	Taste	4.22	Fashion	3.60
Taste	4.00	Climate	4.11	Ease-of-Care	3.60
Boldness	4.00	Fabric	4.11	Beauty	3.60
Exclusivity	4.00	Versatility	4.11	Body Exposure	3.60
Price	3.75	Elegance	4.11	Be Noticed	3.60
Elegance	3.75	Brand	4.11	Ideology	3.60
Mood	3.67	Personal Style	4.11	Versatility	3.40
Climate	3.50	Image Judgement	4.11	Taste	3.40
Physical Adequacy	3.50	Comfort	4.00	Image Judgement	3.40
Age Appearance	3.40	Sensuality	3.89	Price	3.20
Functionality	3.40	Durability	3.78	Brand	3.20
Celebrity Influence	3.33	Fashion	3.78	Profession	3.00
Image Judgement	3.33	Ease-of-Care	3.67	Colour	3.00
Seasonality	3.33	Mood	3.67	Climate	2.80
Durability	3.25	Celebrity Influence	3.67	Durability	2.80
Versatility	3.25	Seasonality	3.67	Elegance	2.80
Opposite Gender	3.00	Price	3.56	Boldness	2.80
Health	2.75	Attraction to Particular Clothes	3.50	Mood	2.80
Welfare	2.75	Boldness	3.44	Moral Conventions	2.40
Attraction to Particular Clothes	2.75	Exclusivity	3.44	Personal Style	2.40
Same gender	2.75	Same Gender	3.44	Exclusivity	2.40
Ideology	2.67	Moral Conventions	3.33	Attraction to Particular Clothes	2.20
Ease-of-Care	2.50	Body Exposure	3.33	Sensuality	2.00
Sensuality	2.50	Profession	3.11	Same Gender	2.00
Moral Conventions	2.25	Opposite Gender	2.78	Opposite Gender	2.00
Profession	2.25	Ideology	2.78	Celebrity Influence	2.00
Body Exposure	2.25	Beliefs	2.67	Health	1.60
Racial Roots	2.00	Health	2.33	Racial Roots	1.40
Beliefs	1.67	Racial Roots	2.11	Beliefs	1.00

Some controversial indicators like *Same Gender*, *Beliefs* and *Racial Roots* were ranked low in company surveys, as well in consumer surveys; this result does not indicate a lack of importance, but, possibly no unanimity with these surveys.

The comparison analysis between the priorities adopted by companies from the three national groups is also interesting to be observed, the *Means-End Chain* was used to support the *Indicators* groups' discussion below.

It is important to highlight in the *Attributes* analysis that Chinese companies ranked *Colour, Balance-Fit, Beauty* and *Price* lower than the British and Brazilian companies, which suggests that the Chinese companies consider their consumers less demanding (Figure 4.42). On the other hand, British companies ranked *Functionality* lower than companies in Brazil and China, which indicates that for British companies the ideal fashion clothing product is more aesthetic (form) than function. The almost equally ranked indicator was *Fabric*, which indicates that all the companies understand the importance of material in the relationship between product and consumer.
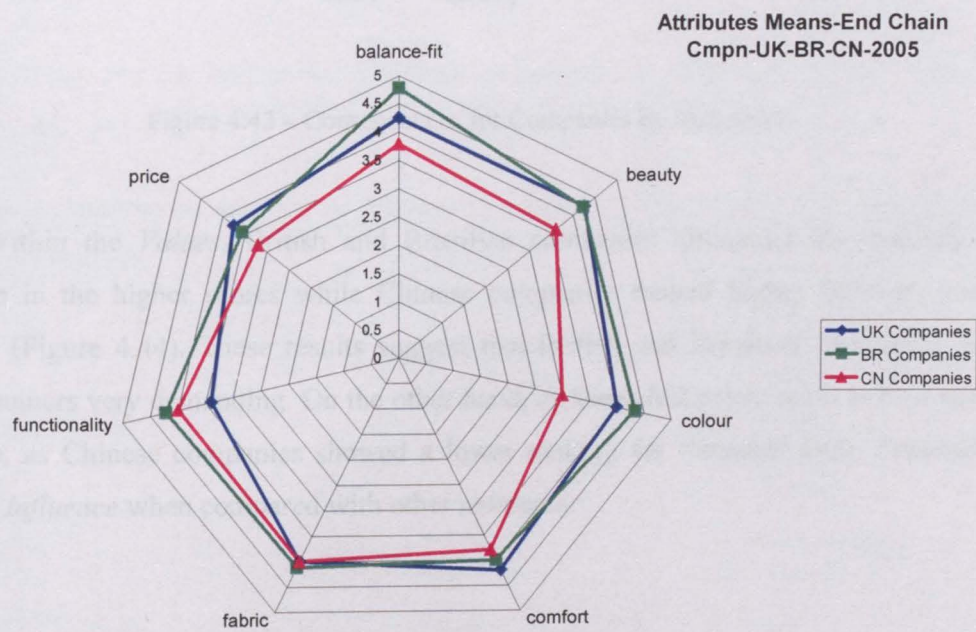
Figure 4.42 – Attributes for Companies by Nationality

In the *Consequences* analysis, *Health* and *Attraction in Particular Clothes,* are the indicators with the lowest score (Figure 4.43); this finding is interesting for it indicates that companies are far from consumer opinions or 'wellbeing' awareness, as care (*Health*) and unusual characteristics (*Attraction in Particular Clothes*) were ranked low. The three national samples showed a diverse preference for the *Indicators*, although the Brazilian companies placed a higher degree of importance on the set of *Indicators*.

270

Using the *Means-End Chain* as a tool to summarize the findings, it is possible to say that British companies are comparatively more focused on ... and Brazilian companies are more focused on *Consequences* and *Values* and the *Attributes* and *Consequences* are the most ...

The similar ... ... by nationality are shown ... The findings suggest, once ... companies with their consumer ... and consumer ... ... indicators which are ...

Figure 4.43 – Consequences for Companies by Nationality

Within the *Values*, British and Brazilian companies alternated the majority of the *Indicators* in the higher scores while Chinese companies ranked highly *Ideology* and *Body Exposure* (Figure 4.44). These results suggest that British and Brazilian companies consider their consumers very demanding. On the other hand, all these *Indicators* seem to be a new issue for China, as Chinese companies showed a lower ranking for *Personal Style*, *Sensuality* and *Celebrity Influence* when compared with other nationals.
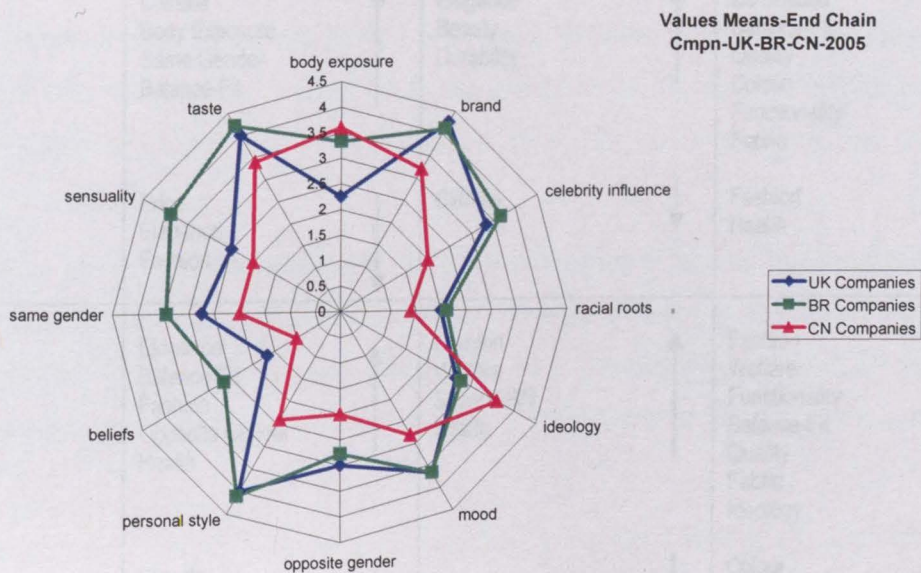
Figure 4.44 – Values for Companies by Nationality

271

Using the *Means-End Chain* as a tool to summarise the *Indicators* analysis, it is possible to say that British companies are comparatively more focused on *Attributes* and *Values*; Brazilian companies are more focused on *Consequences* and *Values*; and the *Attributes* and *Consequences* are the most important for Chinese companies.

The similarities and differences between consumers, designers and companies by nationality are shown in Table 4.91, this table shows a summary of the results just discussed. The findings suggest, once more, that a better connection is needed between the designers and companies with their consumers. Although some professionals stated their awareness of market and consumer research, it seems that the companies are spending effort and money on some indicators which are not as important for consumers as they thought.

Table 4.91 - Indicators for Fashion and Clothing Consumption Comparative Analysis by Stakeholders within the British, Brazilian and Chinese Company Surveys

INDICATORS COMPARATIVE ANALYSIS	CONSUMERS	DESIGNERS	COMPANIES
UK	Elegance Body Exposure Price Balance-Fit Quality Climate Fashion	Quality Balance-Fit Fashion Sensuality Price	Fashion Be Noticed Balance-Fit Quality Brand Colour Fabric Functionality Health
BR	Climate Body Exposure Same Gender Balance-Fit Price Elegance Fashion	Elegance Beauty Durability Climate	Be Noticed Balance-Fit Quality Colour Functionality Fabric Fashion Health
CN	Elegance Balance-Fit Fashion Opposite Gender Health Climate Body Exposure Price	Comfort Welfare Seasonality Health Durability Elegance	Fashion Welfare Functionality Balance-Fit Quality Fabric Ideology Colour Be Noticed Health

272

Reviewing the analysis of the Distinctive Competences for Competitiveness (Hill and Jones, 2004), companies from the UK and China are prioritizing *Innovation*, while for the Brazilian companies *Quality* is the most important dimension to monitor (Table 4.56). Moreover, the competence lower scored by the companies from all the three targeted countries was *Consumer Responsiveness*, which means that the companies are not investing in a balanced way in the crucial dimensions for a better relationship between their products and services and their target market.

One of the crucial aims of this research is to find a common tool for balancing the interests of the three stakeholders: consumers, designers and companies, the next section presents a comparative analysis between them considering the quali-quantitative findings and the discussions.

4.13   ALL QUALI-QUANTITATIVE COMPARATIVE ANALYSIS

After a detailed analysis considering the specific three countries and their markets, this section showed a comparative analysis of the data collected from consumers, designers and companies from a qualitative perspective. At this point, consumer data from the three countries was blended to provide a global industry analysis, the same procedures took place with the designer and company data. Subsection 4.13.1 discusses key issues arising from the content analysis and subsection 4.13.2 compares all the stakeholders' *Means-End Chain* results.

4.13.1   Content Analysis – All Stakeholders

Consumers were asked to mark from 1 to 4 (totally disagree to totally agree) the level of their agreement with the concepts expressed in the questionnaire based on the *Indicators for Fashion and Clothing Consumption*. The analysis took place using the means of these indicators.

There are differences around the prevalence of categories in the national samples of this study: the ten highest means were almost solely from the same indicators. *Welfare* was the most important, followed by *Physical Adequacy* and *Balance-Fit*. *Functionality*, *Colour*, *Be Noticed*, *Versatility* and *Age Appearance* appear as the following highest means for the whole consumer survey.

Designers and Companies were asked to mark a 5-point Likert scale, the degree of importance they gave to their products in relation to the *Indicators for Fashion and Clothing Consumption*.

The designers from all countries seem to have in common an awareness of *Personal Style*, *Taste*, *Quality* and *Beauty* indicators. On the other hand, designers seem to be insensitive to *Beliefs*, *Image Judgement*, *Racial Roots* and *Celebrity Influence*.

Comparing the consumers' results with the ones from the companies, it is possible to find some divergence in the degrees of importance. For companies, the most important common *Indicator* for the three countries is *Balance-Fit* and the least popular are *Racial Roots* and *Beliefs*.

It is important to highlight that designers in general stated that they do not commonly use market research or consumer research while developing products. More over, some designers said that the consumers should adapt themselves to the designer's ideas or search for another designer if their concept is not satisfied. Although this posture is necessary to give the designer a position and a personal concept of their vision of the fashion market, this kind of assertion is considered highly dangerous in a very competitive environment. Considering a common statement from the companies that their priorities are rarely related to the product development area, the role of the designer seems to be vulnerable inside a fashion company.

The majority of the companies declared that they target young, affluent, slim and creative consumers, which does not include a greater part of the population. These companies are missing an alarming quantity of potential consumers and competing in a voracious niche market.

It is true that not all consumers are interested in fashion trends and brand identity, but everybody needs to be dressed, regardless of body requirements or social pressures. For some consumer groups, companies can improve their products focusing on clothing without the need to compete with vogue. The analysis of the *Indicators* suggests a lot of distinct approaches that the companies could adopt to increase their market share.

In order to facilitate the interpretation of the *Indicators*, the *Means-End Chain* was used to group them in three distinct and complementary dimensions. Next section presents the analysis of these indicators following this theory and comparing the stakeholders without filtering their nationalities.

4.13.2 Laddering – All Stakeholders

The first point for consideration is related to the *Attributes* of a piece of clothing. These indicators: *Fabric*, *Functionality*, *Comfort*, *Balance-Fit*, *Colour*, *Beauty* and *Price* are embedded in the concept of a product and are related to tangible parameters.

274

Figure 4.45 compares the aggregate frequency mean values (UK+BR+CN) of the *Attributes* judged by the three target groups: consumers, designers and companies. For consumers, the question related to the degree of importance they give to the *Attributes*. For designers and companies the question was what degree of importance they think their consumers give to these *Attributes*. It is interesting to point out that these designers and companies have similar opinions regarding the *Attributes*. On the other hand, there is a significant distance between the opinions of consumers and what designers and companies consider consumer opinion to be, this is particularly true in relation to *Functionality*, *Price* and *Colour* and *Beauty* and *Comfort* which seem to have a slightly greater importance for designers than consumers.

Attributes Means-End Chain
Csmr-UK-BR-CN-2004
Dsgn-UK-BR-CN-2005
Cmpn-UK-BR-CN-2005
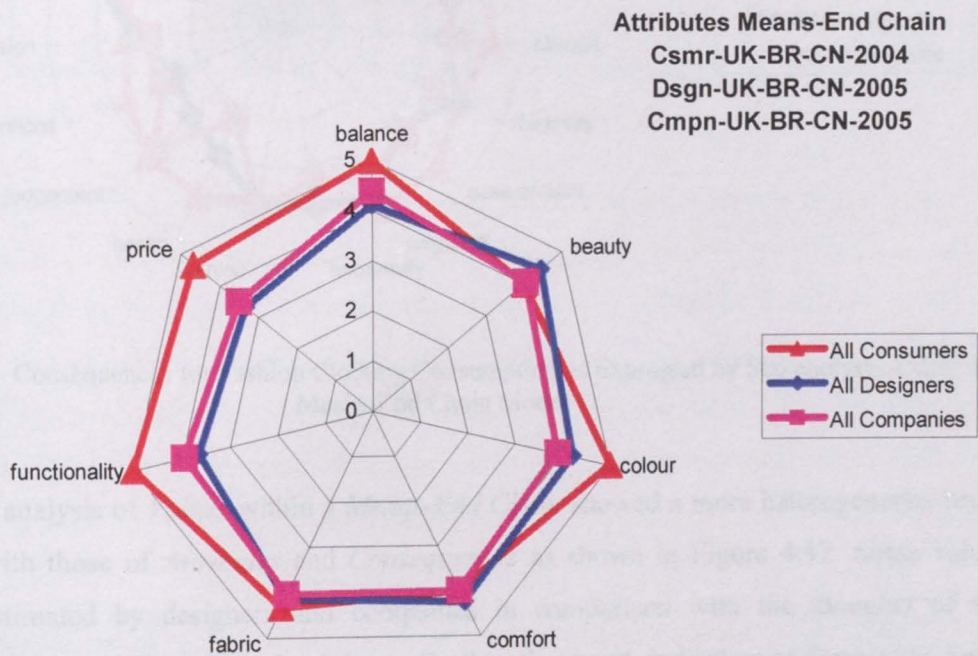
Figure 4.45 – Attributes for Fashion Clothing Consumption as Expressed by Stakeholders Using the Means-End Chain Model

The analysis of the *Consequences* descriptors in a *Means-End Chain* has revealed some points for reflection (Figure 4.46). Consumers gave the maximum score to five of the indicators: *Versatility*, *Welfare*, *Age Appearance*, *Be Noticed* and *Physical Adequacy*. *Health* is an underestimated indicator by companies, which means that fashion businesses could demonstrate more social responsibility. Designers do not value the *Moral Convention* indicator in comparison with the other two target groups. *Quality* is the indicator considered least important for consumers in the consequences measured. This fact does not mean that consumers are not interested in product quality but possibly it is a consequence of the short life cycle of the clothing product and a widespread acceptable standard of fashion products.

Another very interesting finding relates to *Physical Adequacy*; Designers, the ones who should be thinking about the support of the clothing, the human body, are the group that give least value to this aspect.
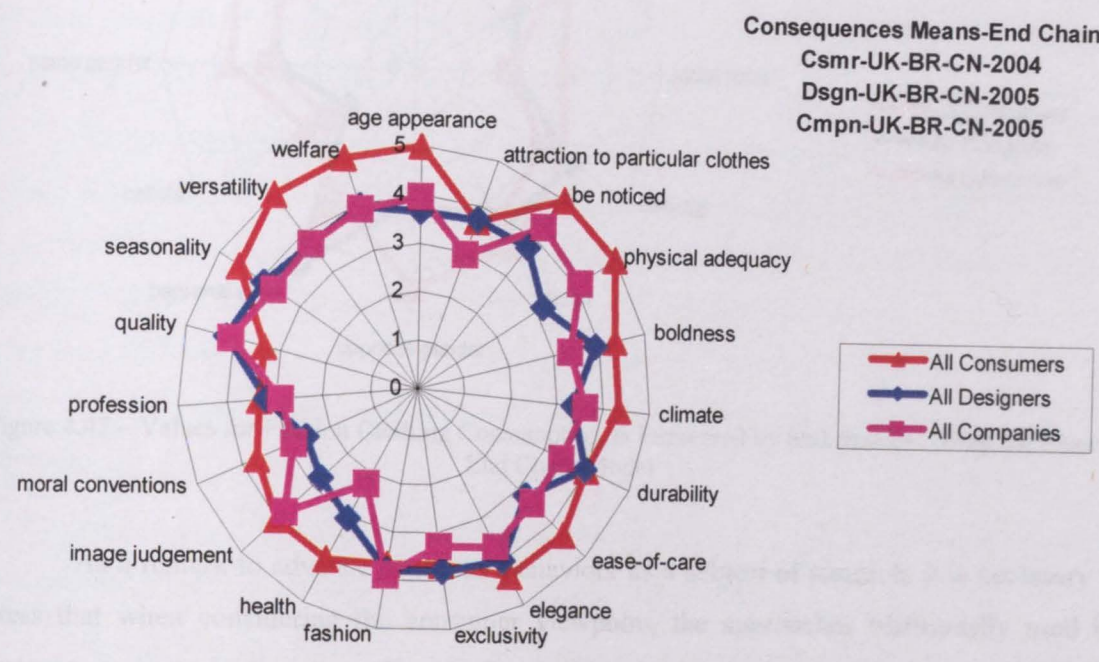
Figure 4.46 – Consequences for Fashion Clothing Consumption as Expressed by Stakeholders Using the Means-End Chain Model

The analysis of *Values* within a *Means-End Chain* showed a more heterogeneous result compared with those of *Attributes* and *Consequences* as shown in Figure 4.47. Some values were overestimated by designers and companies in comparison with the thoughts of the consumer as *Personal Style*, *Brand* and *Taste*. On the other hand, indicators as *Sensuality*, *Same Gender*, *Opposite Gender*, *Racial Roots* and *Body Exposure* received higher attention from the consumers when compared with the designers and companies.

If *Values* is the dimension 'end' of the chain, designers and companies should review their approaches to come closer to the consumers' views.
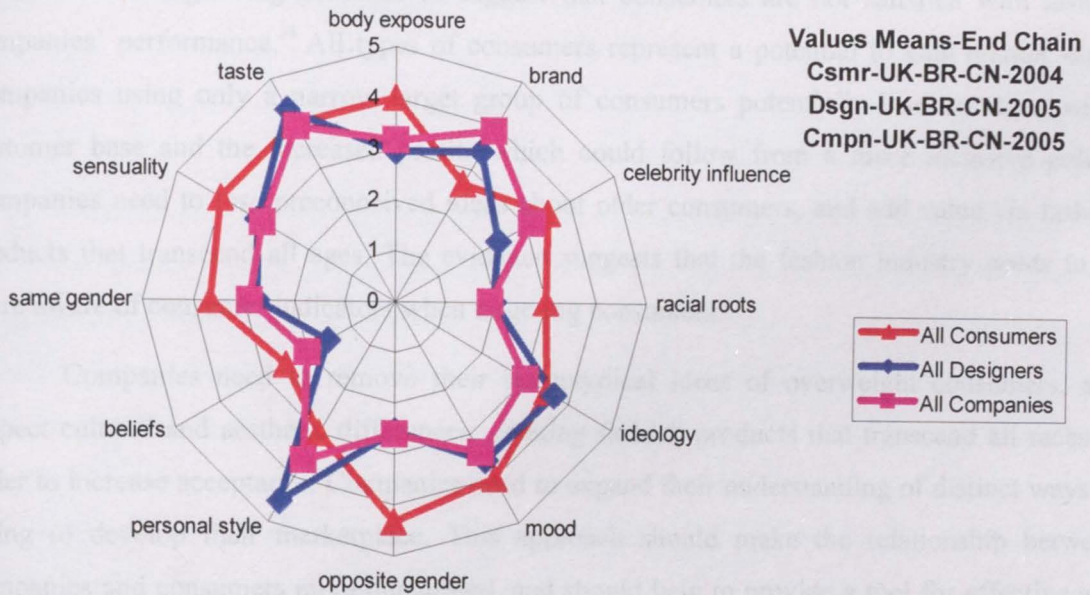
Figure 4.47 – Values for Fashion Clothing Consumption as Expressed by Stakeholders Using the Means-End Chain Model

As a remark to advance consumer behaviour as a subject of research, it is necessary to stress that when considering the consumer viewpoint, the approaches traditionally used by designers seem to be the most effective for their search for satisfaction. Designers in general should have user-based knowledge and attitudes. However, the outcomes indicate that fashion designers do not have access to adequate information on consumer needs. The reason for this varies from brand-diffusion designers whose briefings are supplied by marketing departments, to designer-name brands where the conceptual ideas of the designer-chief are the key factors in the briefing.

Designers' answers demonstrate a lot of emphasis upon *Personal Style*, possibly, as a direct consequence of their own individuality expressed through their creative process. Taste, also being subjective, was scored higher by designers. *Opposite Gender* is the most important *Value* for consumers. Female consumers seem to be constantly aware of surrounding people, particularly if the surrounding people are men. The results indicate that the same happens with male consumers when in an environment of women. The nature of the research did not consider issues of sexual orientation so no comment can be made about homosexual attitudes in this context. *Beliefs* and *Celebrity Influence* are values particularly underestimated by designers.

Companies underestimated the *Ideology* value for consumers, although, closely followed by designers, gave substantially more value to *Brand*. This may explain the increased importance attached to branding within companies' marketing departments. *Brand*, however, had the least value among consumers as a group.

There is growing evidence to suggest that consumers are not satisfied with fashion companies' performance.[34] All types of consumers represent a potential to gain market share. Companies using only a narrow target group of consumers potentially lose out on a wider customer base and the increased profits which could follow from a more inclusive policy. Companies need to lose preconceived ideas about older consumers, and add value via fashion products that transcend all ages. The evidence suggests that the fashion industry needs to be more aware of consumer indicators when targeting consumers.

Companies need to remove their stereotypical ideas of overweight consumers, and respect cultural and aesthetic differences, creating fashion products that transcend all races in order to increase acceptance. Companies need to expand their understanding of distinct ways of living to develop their marketplace. This approach should make the relationship between companies and consumers more human-led, and should help to provide a tool for effective and more focused decision-making techniques, leading to the development of better fashion products.

This research indicates that a dramatic change in the way fashion clothing companies manage their businesses could ensure greater growth or commercial success.

The continuous measurement of the *Attributes*, *Consequences* and *Values* in a *Means-End Chain* is suggested as an innovative way to target different types of consumers. The model offers the possibility of working with qualitative and quantitative data in a complementary and more assured way. Qualitative analysis can be fed by data gathered from focus groups and the indicators can be measured by surveys included in a consumer register with a loyalty card or similar approach.

Moving forward in an attempt to build a model for product development that can satisfy consumers as well as designers and companies from the fashion industry, some analysis's were carried out using sophisticated methods within qualitative and quantitative approaches as well as a blend of approaches.

The next chapter introduces a sequence of a construction for a model that supports the development of fashion clothing products. A different perspective for consumer needs and expectations analysis is suggested, as well as a checking tool for designers and companies in order to promote closeness with their targets.

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[34] KSA Consumer Outlook Survey 1999.

278

CHAPTER 5 – CONTRIBUTION TO KNOWLEDGE

This chapter presents the contribution this research makes to knowledge. The first section (5.1) condenses the key findings shown in the previous chapter. Section 5.2 introduces a comparative analysis for all stakeholders and prepares the groundwork for the introduction of the product development model in fashion clothing, which is introduced in Section 5.3. In order to aid understanding of the model, Section 5.4 presents the potential use of the proposed model as a predictive device as well as a management tool for the industry. Some examples are given and discussed based on secondary data. The last section of the chapter briefly summarizes the highlights of the findings.

5.1   REVIEW OF ANALYSES

The previous chapter (Chapter 4) comprised of several analyses of data gathered from the consumer, designer and company surveys carried out in the UK, Brazil and China. Due to the extent of the analyses and the nature of the methods adopted, before the presentation of the key findings and further discussion, it would seem to be necessary to review some of the results at this point of the research. The analyses were carried out firstly with distinct stakeholders (Sections 5.1.1, 5.1.2 and 5.1.3), and later comparing and commenting upon similarities and differences between the results.

5.1.1   Consumer Analyses

The first batch of analyses was carried out with information gathered from consumers in United Kingdom, Brazil and China. The analyses used three approaches: qualitative, quantitative and quali-quantitative. The first method added the *Indicators for Fashion and Clothing Consumption* to the content analysis and also considered the Emotional Design theory (Norman, 2002). Therefore, the analysis developed the investigation of the favourite clothing from selected consumers from all three nationalities.

Quantitative methods were then applied using selected theories of *Needs*, *Motives* and *Pleasures*. To acquire further understanding of fashion clothing consumer behaviour, the *Means-End Chain* model was used within a quali-quantitative approach. Figure 5.1 illustrates the research analysis framework applied to the consumer databases, in order to support the concept of the proposed model.

279
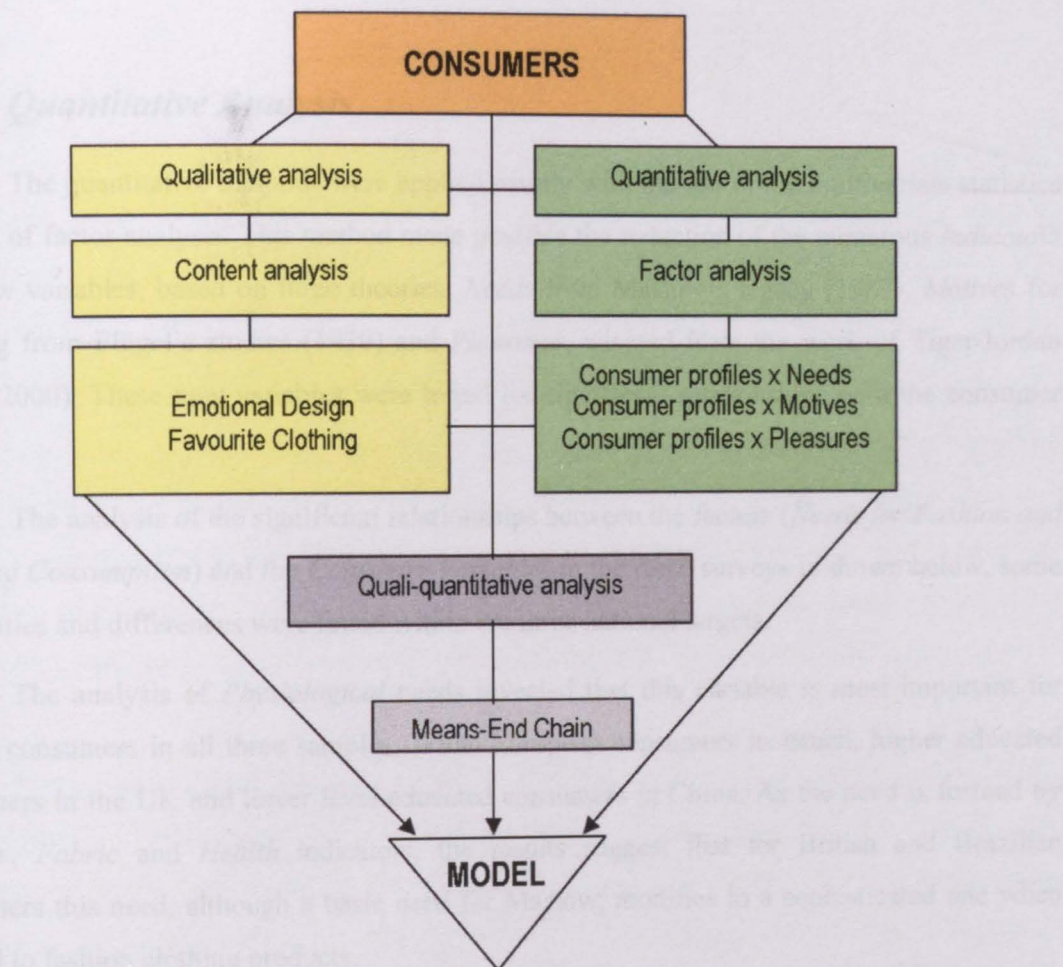
Figure 5.1 – Research Methods for Consumers

Qualitative Analysis

The research carried out based on the concept of the three levels of processing Emotional Design revealed that *Behavioural* and *Reflective* are more relevant levels for British consumers. *Visceral* and *Reflective* are the levels that are more important to Brazilian consumers. For the Chinese consumers, however, *Visceral* and *Behavioural* levels seem to be more decisive than the *Reflective* level. The coincidental findings between the target nationalities should be considered as important for product development in a global market context. The noteworthy results are crucial to greater responsiveness to local consumers.

Based on the survey results related to the favourite item of clothing, it is possible to affirm that while British consumers are more likely to choose fashion clothing products that satisfy their *self-emotional* needs, Brazilian consumers choose products that have higher *socio-emotional* appeal. Chinese consumers, on the other hand, are more likely to choose *function-emotional* messages. A clear segmentation of the *Indicators* suggested that three main areas of awareness arose from the national group of consumers: *individual* lineage, *social* lineage and *physical* lineage.

280

Quantitative Analysis

The quantitative methods were applied mainly with the use of the multivariate statistics method of factor analysis. This method made possible the reduction of the numerous *Indicators* to a few variables, based on three theories: *Needs* from Maslow's legacy (1987), *Motives* for clothing from Flügel's studies (1930) and *Pleasures*, adapted from the work of Tiger/Jordan (1992, 2000). These new variables were tested for significant relationships with the consumer profile.

The analysis of the significant relationships between the factors (*Needs for Fashion and Clothing Consumption*) and the *Consumer Variables* in the three surveys is shown below, some similarities and differences were found within the three national targets.

The analysis of *Physiological* needs revealed that this variable is most important for female consumers in all three samples, White/European consumers in Brazil, higher educated consumers in the UK and lower level educated consumers in China. As the need is formed by *Climate*, *Fabric* and *Health* indicators, the results suggest that for British and Brazilian consumers this need, although a basic need for Maslow, modifies to a sophisticated one when applied to fashion clothing products.

The only correlation found between the *Safety* need and British consumers was with *Gender*, with female consumers having higher awareness. The same tendency happened in the Brazilian sample, although this need also presented relationships with *Religion*, *Ethnicity* and *Income*. In China, consumers had relationships between the *Safety* need not only with socio-economic variables (*Age* and *Income*), but also with physical variables (*Height Male*, *Weight Male* and *Body Mass*). Considering that the *Safety* need is a reduction of the indicators *Balance-Fit*, *Comfort*, *Functionality*, *Price* and *Physical Adequacy*, it is an unexpected result as only the Chinese sample presented a link with the physical variables. This suggests that this group of indicators demands further investigation.

The *Social* need results, shaped from a combination of *Age Appearance*, *Fashion*, *Versatility*, *Opposite Gender* and *Same Gender*, showed some similarities for the three targeted nationals with *Gender* and *Age*. Female and younger consumers have more concern about this need than other categories of consumers. Relationships with physical variables were found between *Social* need and the British and Brazilian samples which suggests the social pressure for a body and image as close as possible to an ideal standard.

Within the analysis of the *Esteem* need a coincident relationship was found between British and Chinese consumers within *Gender*. Female consumers consider this need (a combination of *Beauty, Elegance, Body Exposure, Be Noticed, Sensuality* and *Exclusivity*) more than males. For Brazilian consumers only, underweight consumers showed correlation with the *Esteem* need which indicates a higher pressure for a perfect body within Brazilian society.

The *Self Actualisation* need presented a number of correlations with consumer variables, but only one was present in all three samples (*Gender*, females); and another was coincident for both British and Chinese surveys (*Weight*, males). Considering that this need was a reduction of the indicators *Welfare, Colour, Personal Style, Boldness* and *Taste*, a relationship with Gender was more expected than with a physical variable. This result should be investigated further.

In relation to Flügel's motives , it can be said that the *Protection* motive, shaped from a combination of *Functionality, Climate, Fabric, Welfare, Quality* and *Ease-of-Care*, is more important to British and Brazilian female consumers and to affluent and underweight male consumers. *Decoration*, a blend of *Balance, Be Noticed, Versatility, Elegance, Age Appearance, Colour, Beauty, Balance-Fit, Fashion* and *Sensuality*, presented an interesting relationship with *Body Shape* within the Chinese sample. In addition within the Brazilian sample, White/European consumers had more awareness of *Decoration* than the other ethnic categories. Within the three samples, female consumers are more concerned about the *Modesty* motive, formed by the indicators *Opposite Gender, Same Gender, Brand, Body Exposure* and *Physical Adequacy*, showed a higher number of relationships if compared with the other two motives, especially within the Chinese sample. Overall, within the three samples, *Body Mass* was the common variable, with underweight consumers assigning more relevance to *Modesty*.

The analysis achieved via the *Pleasures* highlighted that within fashion clothing consumption, *Socio* pleasure is the most evocative for all target nationalities. *Physio* pleasure, in comparison with the other pleasures, seems to be generally the least important aspect within fashion clothing consumption, but it is still important for females. An analysis of *Psycho* pleasure revealed no coincidental relationships between consumer profiles apart from *Gender*. The importance of *Ideo* pleasure was significantly more associated with British consumers.

The objective of these aspects of the research was to check the suitability of these theories as a way of explaining the consumer behaviour within fashion clothing products. Moreover, making a comparison between theories, it can be affirmed that *Gender, Age and Body Shape* affects consumer choice in a wide variety of respects. *Gender* and *Age* are well known variables in a diverse field of investigation within fashion consumption. But these research results made clear the relevance of *Body Shape* diversity and its usefulness within the product development process. The findings showed that for consumers, figure, body volumetric and body shape all influence their choice of fashion clothing products. The results also indicated that body shape has a distinct influence on choices made by both female and male consumers.

Quali-quantitative Analysis

The last of the modes of investigation carried out with consumer data combined qualitative and quantitative methods and was used as an adaptation of the *Means-End* theory, developed by Gutman (1982) as a marketing and management tool.

In comparing the three nationalities, it can be said that British consumers seem to regard *Values* as the most important, while Brazilians emphasize the importance of *Attributes*. On the other hand, for Chinese consumers, *Consequences* is the most desired dimension within the chain.

Some interesting findings showed the differences and similarities between the three national groups of consumers in relation to the *Indicators for Fashion and Clothing Consumption*. The results suggest that *Elegance* seems to be more important to British and Chinese consumers when compared with the Brazilians. *Climate* as an indicator is not so important to British and Chinese consumers, although for Brazilians it is the sixth most important. This result possibly indicates that the abrupt changes of temperature between exterior and interior are really uncomfortable for Brazilians, and the choice of appropriate clothing can help with this.

Chinese consumers seem to have less awareness of *Body Exposure* than British and Brazilians. Possibly, consideration of the power of the body as a means of communication has a higher profile in Western societies than in the East. The indicator *Price* was ranked higher for British consumers, followed by the Brazilians, and being less important to Chinese consumers. Although luxury European items are more expensive in Asia, an ordinary piece of clothing is considerable cheaper.

In relation to gender, *Opposite Gender* showed itself to be more important to Chinese consumers than the other two nationalities. This finding suggests that clothing can help to impress a partner for those in the East as well. In relation to the *Same Gender* indicator, the highest awareness came from the Brazilian consumers. As Brazil is known as a competitive society this finding can explain the 'run to be the best' among a group of friends; the indicator *Beauty* was ranked higher by Brazilian consumers.

Health as an indicator was comparatively more important to Chinese consumers, followed by Brazilians and then the British. Culturally, Asian society is more orientated to prevention than cure, using herbs and medication prior to using medicines and hospitals, which can explain this tendency. Brazilians, due to their mixed roots, especially indigenous and African, consider a lot of popular potions when treating any health problems.

The results are numerous and extended, and considering the dynamics of the product development process, the proposed device should be very simple and usable without restriction. Before its introduction, some key findings gathered from designers and companies are reviewed.

5.1.2 *Designer Analyses*

The second batch of analyses for this research was carried out with British, Brazilian and Chinese designer groups. The data gathered from interviews was investigated using qualitative, quantitative and quali-quantitative methods.

Firstly the analysis relates to the designer's view of consumers, followed by their current practices and skills. Secondly, the designer practices were analysed according to their *Artistic*, *Brand* and *Product* perspectives. Finally, the method of analysis used the *Means-End Chain* in order to compare the designer's *Attributes*, *Consequences* and *Values* in relation to the consumer preferences. Figure 5.2 below, illustrates the procedures followed with the designer databases.

284
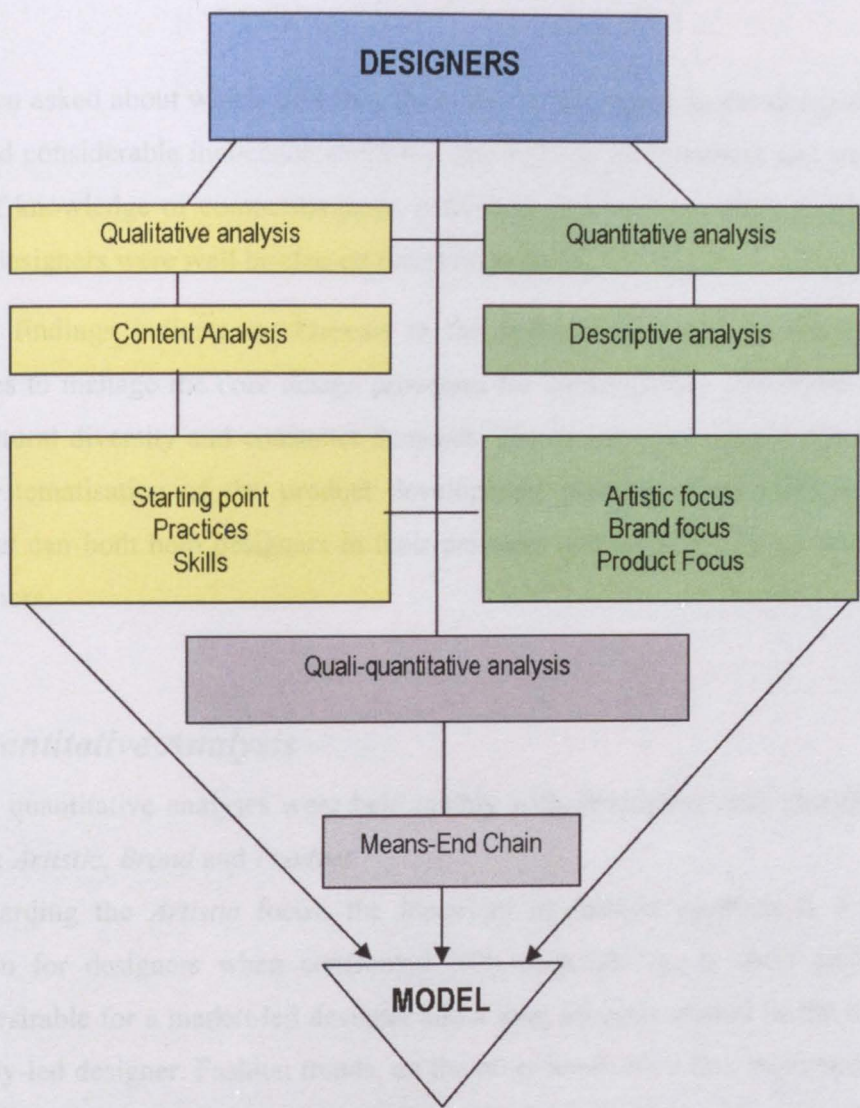
Figure 5.2 – Research Methods for Designers

Qualitative Analysis

The qualitative analysis was related to their product development processes, from the starting point to practices and skills. An important result was that 45% of the designers within the sample have no practices relating to any kind of consumer research in their product development process. However, the majority of the designers surveyed, focus their development towards a small group of young, affluent, independent consumers.

Another interesting point to highlight is that when designers were asked what they consider to be their strongest skill, the majority of the designers seem to consider it related to their technical knowledge or creative-artistic side. None of the designers mentioned their ability to understand and satisfy consumer needs or expectations.

When asked about which skill they think should be improved, the designers, in general, demonstrated considerable innocence about the real business environment and are conscious of their lack of knowledge of competitiveness, marketing and business skills. For example, only 55% of the designers were well briefed on their competitors.

The findings indicate weaknesses in the fashion designers' knowledge, skills and competencies to manage the core design processes for contemporary collections that meet the needs of cultural diversity and consumer demands. The results also suggest that there is a real need for systematisation of the product development process, a checklist or any kind of guidance that can both help designers in their practices and acquire a better understanding of their consumers.

Quantitative Analysis

The quantitative analyses were held mainly with descriptive data classified into three distinct foci: *Artistic, Brand* and *Product*.

Regarding the *Artistic* focus, the longevity of fashion products is a high priority consideration for designers when confronted with disposability. A short product lifecycle should be desirable for a market-led designer and a long lifecycle should be the best option for an artistically-led designer. Fashion trends, on the other hand, are a less important parameter to be considered when compared with inspiration. This result shows the individuality of the designer is prioritised over the social environment and consumer trends and that reflective practice is dominant. Designers also prefer inspiration and exclusivity when confronted with trends and large scale production, respectively. The inspirational approach led to a self-orientated and subjective practice, far removed from consumers' feelings and expectations. The designers' preference for exclusivity emphasised that their position is more related to an artistic than a business function.

When analysing *Brand* focus, the results indicate that the designers are unaware of the specifics of the local consumer environment, even though they are working on projects with a potentially global reach. Also, there is a slight preference by designers to work with luxury brands rather than diffusion. Although the majority of designers stated they prefer to work with a balance between market and consumer, there is a tendency towards the consumer-driven side. This is, in essence, a good sign, however, the qualitative research carried out with the designers indicates that the consumers focused on by designers are far from the majority of 'common people'.

The analysis of the *Product* focus led to quality as the highest ranked parameter when confronted with price. This fact shows the commitment the designers have to their product, although it places them far from the reality of business, as price and cost are decision-making elements. Also by preferring handmade to machine made, designers demonstrated their displeasure with technological processes. Designers try to satisfy the consumers' minds rather than consumers' bodies; this result highlights the lack of understanding and attention the designers give to the physical characteristics and needs of consumers. Although it is important to highlight that when confronting two pleasures, Psycho and Physio, designers tend to act in a balanced way.

Quali-quantitative Analysis

Finally, quali-quantitative methods were applied to the designer database. The method of analysing the data gathered followed the same sequence used for the analysis of consumer surveys: firstly, a general comparison between designers' understanding of the Indicators' importance for consumers, and later, a comparison splitting the *Indicators for Fashion and Clothing Consumption* into the three clusters of the *Means-End Chain Model*.

Looking at the means, the designers from all three countries seem to have the following indicators as common priorities: *Taste, Personal Style, Quality* and *Beauty*. On the other hand, designers from the three targeted countries do not emphasize *Same Gender, Opposite Gender, Celebrity Influence, Ethnicity* and *Religion* in relation to their consumers.

Comparing the data gathered from consumers and the data picked out from the designers, some comments about their divergence of opinion can be made. In the United Kingdom, while consumers rate *Price* higher than *Quality*, the designers opinion was the opposite. With the Brazilian surveys, divergence in the degree of importance assigned by consumers and designers was observed, especially for *Climate* and *Elegance*. Although the Chinese consumers and designers seemed to be closer in opinion, which means that designers know more about their consumers, with only some differences with regards to *Durability* and *Elegance*.

When analysing the *Means-End Chain*, for British designers *Balance-Fit* seems to be the most important indicator in the *Attributes* category, while *Beauty* is top for Brazilians and *Comfort* is the indicator that Chinese designers give more attention to. It is important to stress that designers from China ranked all the attributes lower than their colleagues from the UK and Brazil.

Within the *Benefits* category, *Fashion* and *Quality* are the most important elements for British designers; *Elegance* and *Durability* for Brazilians; and *Welfare*, *Seasonality* and *Health* for Chinese designers. Great discrepancies were observed between the opinions of the designers from the three countries in relation to components in the *Consequences* category.

Comparison of *Values* awareness among the designers showed that they shared similar opinions, except within *Sensuality*. This component is most important for British designers, followed by Brazilians and then by Chinese designers.

All of these analyses provide substantial input for the concept of a supportive tool for successful product development in the fashion clothing industry. The next subsection reviews some of the findings brought up within the companies.

5.1.3 Company Analyses

The last batch of analyses resulted from interviews with design company managers. Again, the investigation used three variations of method: qualitative, quantitative and quali-quantitative. The first part investigated the company's distinctive competencies targeting strategy and competitiveness techniques, followed by the company's view of their targeted consumers. The following analyses were carried out considering the company's *Market*, *Strategy* and *Value* foci. Finally the analysis of the *Indicators for Fashion and Clothing Consumption* was carried out using the *Means-End Chain Model*, to compare companies and their consumers. The main framework used with the analyses is shown in Figure 5.3 below.
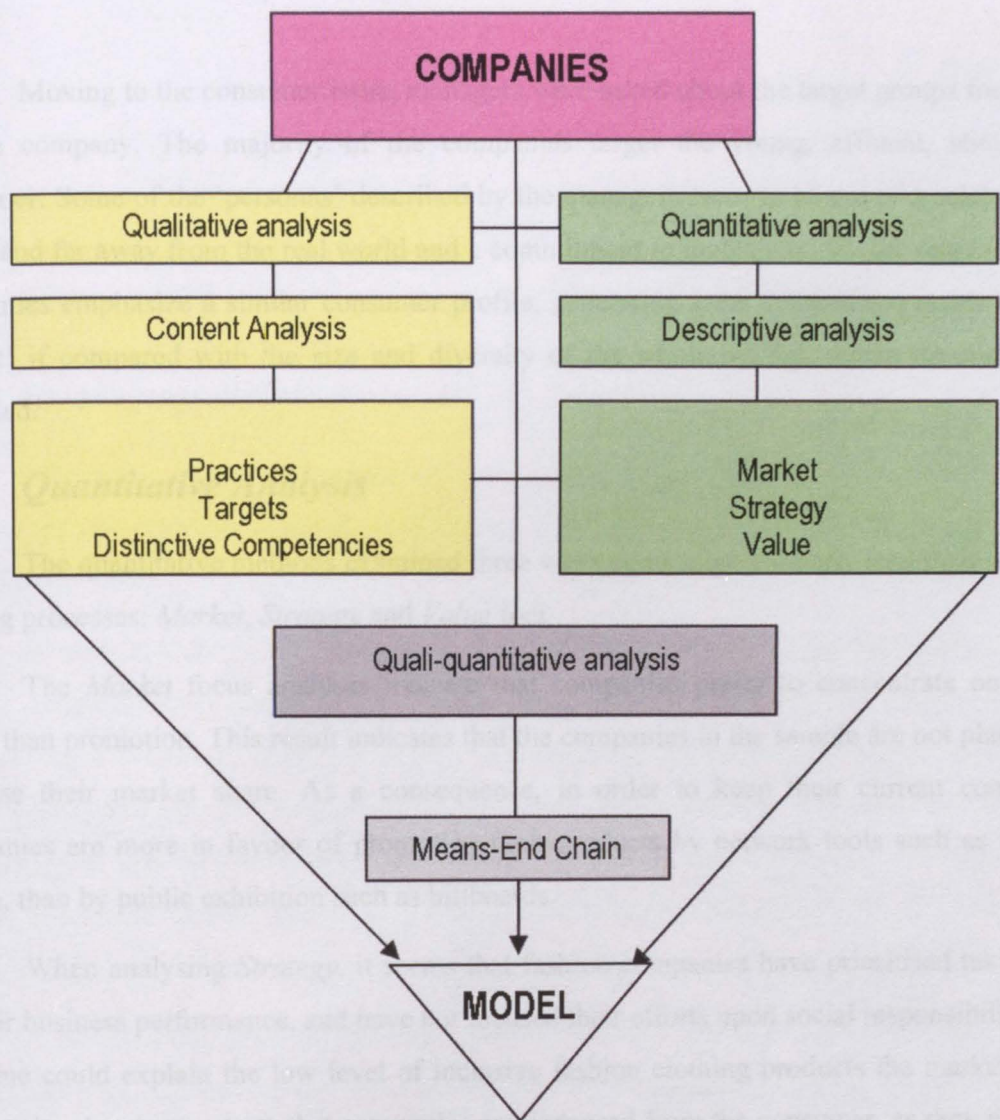
Figure 5.3 – Research Methods for Companies

Qualitative Analysis

The qualitative analysis related to the companies' practices, targets and distinctive competences adopted from the Hill and Jones (2004) management theories, are seen as especially important within a competitive environment.

Within 20 fashion companies, only seven mentioned anything that related to product development as their strongest characteristic. Moreover, when managers were asked about the areas of improvement their companies envisage, only six companies included anything about product development. These results suggest that companies, despite working in the fashion business, do not consider the product development or the design process as a strategic strength.

Moving to the consumer issue, managers were asked about the target groups focused on by the company. The majority of the companies target the young, affluent, slim, active consumer. Some of the 'personas' described by the managers seem to be out of a celebrity chat show, and far away from the real world and a commitment to inclusivity. On the other hand, the companies emphasize a similar consumer profile, generating great competition inside a 'small market' if compared with the size and diversity of the whole market, where the majority is excluded.

Quantitative Analysis

The quantitative methods examined three ways companies normally lead their decision-making processes: *Market*, *Strategy* and *Value* foci.

The *Market* focus analyses indicate that companies prefer to concentrate on loyalty rather than promotion. This result indicates that the companies in the sample are not planning to increase their market share. As a consequence, in order to keep their current consumers, companies are more in favour of promoting their products by network tools such as word of mouth, than by public exhibition such as billboards.

When analysing *Strategy*, it seems that fashion companies have prioritised taking care of their business performance, and have not focused their efforts upon social responsibility. This outcome could explain the low level of inclusive fashion clothing products the market offers. The results also demonstrate that companies are distanced from the consumer, as they preferred market and global keywords. Surprisingly, companies prefer commitment as opposed to profitability which should indicate that the managers consider their companies, give value to networks and see the social role of the firms. These results also show a disagreement within their practices.

In relation to the *Value* focus analysis, companies within the sample demonstrated their priority is quality rather than price. On the other hand, a slightly converse tendency can be observed within the low cost/fair trade item. Although consumers ranked quality lower, it does not mean that consumers are not interested in quality, but that their expectations are higher than that which the companies currently offer. Exclusivity is pursued by the majority of the companies as opposed to large scale. In fact, it seems that the value the companies are putting on their products is more by restricting the product diffusion than effectively enhancing their proprieties, such as durability.

These results may suggest that although the companies have stated they are in good health, some of their choices which focused on *Market, Strategy* and *Value* seem to be incoherent when confronted with each other. It appears to be necessary to consider these inconsistencies when modelling a tool to support the development of fashion clothing products.

Quali-quantitative Analysis

Afterwards, the quali-quantitative methods were used to investigate the way companies consider the *Indicators for Fashion and Clothing Consumption*, this time, adapted to the *Means-End Chain* theory.

Fashion and *Be Noticed* are the indicators rated higher by the British companies, and fashion trends are comparatively less important for Chinese and Brazilians respectively. The need to 'stand out from the crowd' is also shared with Brazilian companies, although for the Chinese companies the products priorities are others such as *Welfare* and *Functionality*. These results suggest that the British companies are more aware of social and individual aspects as a competitive factor, that the Brazilian companies are targeting the technology and individuality issues, and that the Chinese companies are focusing on objectivity and essentiality.

It is important to highlight in the *Attributes* analysis that Chinese companies ranked *Colour, Balance-Fit, Beauty* and *Price* lower than the British and Brazilian companies, which suggests that the Chinese companies consider their consumers less demanding. On the other hand, British companies ranked *Functionality* lower than companies in Brazil and China, which indicates that for British companies the ideal fashion clothing product is more aesthetic (form) than function. The almost equally ranked indicator was *Fabric*, which indicates that all the companies well understand the importance of the material within the relationship between the product and the consumer.

Inside the *Consequences* analysis, *Health* and *Attraction to Particular Clothes* are the indicators with the lowest score. This finding is interesting in that it indicates that the companies are going away from some consumer trends such as care and unusual characteristics for fashion clothing products. The three national samples showed diverse preferences within the indicators, although the Brazilian companies noted a higher degree of importance for the indicators.

Within the *Values*, British and Brazilian companies alternated in respect to the majority of the *Indicators* with the highest scores, while Chinese companies ranked *Ideology* and *Body Exposure* higher than the others. These results suggest that British and Brazilian companies consider their consumers very demanding. On the other hand, all these *Indicators* seem to be a new issue for China, as Chinese companies showed a lower ranking for *Personal Style*, *Sensuality* and *Celebrity Influence* when compared with other nationalities.

Using the *Means-End Chain* as a tool to summarise the *Indicators* analysis, it is possible to say that British companies put comparatively more emphasis upon *Attributes* and *Values*; Brazilian companies focus more on *Consequences* and *Values*, and *Attributes* and *Consequences* are the most important for Chinese companies.

Reminding the reader that one of the crucial aims of this research is to find a common tool to balance the interests of the three stakeholders – consumers, designers and companies, the next section analyses and discusses the selected findings.

5.2 ALL STAKEHOLDERS COMPARATIVE ANALYSIS

After a detailed analysis considering the specific three stakeholders separately, their countries, and their markets, this section reviews the comparative analysis carried out with consumers, designers and companies, broadening qualitative, quantitative and quali-quantitative perspectives. At this point, consumer data from the three countries was also blended to provide a global industry analysis.

5.2.1 *Qualitative Analysis –All Stakeholders*

There are differences around the prevalence of categories in the consumer sample of this study: the ten highest means were almost all from the same *Indicators* (See Table 4.88 in Chapter 4). *Welfare* was the most important, followed by *Physical Adequacy* and *Balance-Fit*. *Functionality*, *Colour*, *Be Noticed*, *Versatility* and *Age Appearance* appear as the next highest means for the whole consumer survey.

The designers from all of the countries seem to have in common an awareness of *Personal Style*, *Taste*, *Quality* and *Beauty* indicators. On the other hand, designers seem to be insensitive to *Beliefs*, *Image Judgement*, *Racial Roots* and *Celebrity Influence* (See Table 4.89, Chapter 4).

Comparing the consumers' results with the ones from the companies, it is possible to find some divergence in the degrees of importance. For companies, the most important common indicator for all three countries' companies is *Balance-Fit* and the unsupported ones are *Racial Roots* and *Beliefs* (See Table 4.90 in Chapter 4).

It is important to highlight that designers in general stated that they do not commonly use market research or consumer research while developing products. Some designers even stated that consumers should adapt themselves to the designer's ideas or search for another designer if their concept is not satisfying. Although this stand is necessary to give the designer a position and a personal concept of their vision of the fashion clothing market, this kind of assertion is considered highly risky in a very competitive environment. Moreover, considering a common statement from the companies that their priorities are rarely related to the product development area, the role of the designer seems to be vulnerable within a fashion company.

The majority of the companies declared that they target young, affluent, slim and creative consumers, which does not equate to the majority of the population and an alarming degree of competition in a niche market. It is true that not all consumers are interested in fashion trends and brand identity, but everybody needs to be socially dressed. The analysis of the *Indicators* suggests a lot of distinct approaches that the companies could adopt to increase their market share.

5.2.2 *Quantitative Analysis –All Stakeholders*

A comparative quantitative analysis of the three stakeholders was not appropriate due to the different nature of the data and methods (inferential statistics) and the proposed theories adopted for each of the quantitative analyses held until this point.

Some descriptive analyses within comparisons have already been commented upon, others, in relation to quali-quantitative methods, are more appropriate for discussion in the next section.

To build a model for product development that can satisfy consumers as well as designers and companies from the fashion clothing industry, some analyses were carried out using a quali-quantitative approach.

5.2.3 Quali-quantitative Analysis –All Stakeholders

With the *Means-End Chain* analysis, the first point for consideration relates to the *Attributes* of a piece of clothing. The comparison of the aggregated frequency mean values (UK+BR+CN) of the *Attributes* judged by the three target groups: consumers, designers and companies, showed that designers and companies have quite similar opinions about *Attributes*. On the other hand, there is a significant distance between the opinions of consumers, and what designers and companies consider consumer opinion to be. This is particularly true in relation to *Functionality*, *Price*, *Colour*, *Beauty* and *Comfort*, which all seem to have a slightly greater importance for designers than consumers (See Figure 4.45, Chapter 4).

Analysis of the *Consequences* descriptors in a *Means-End Chain* has revealed some points for reflection. Consumers gave the maximum score to five of the indicators: *Versatility*, *Welfare*, *Age Appearance*, *Be Noticed* and *Physical Adequacy*. *Health* is an indicator underestimated by companies, which means that fashion businesses could demonstrate more social responsibility. *Quality* is the indicator considered least important for consumers in the consequences measured. Another very interesting finding relates to *Physical Adequacy*; Designers, the ones who should be thinking about the support of the clothing, the human body, anthropometrics and ergonomics, are the group that gave least value to this aspect (See Table 4.46 in Chapter 4).

The analysis of *Values* within a *Means-End Chain* showed a more heterogeneous result compared with those of *Attributes* and *Consequences*. Some values were overestimated by designers and companies in comparison with the thoughts of the consumer - *Personal Style*, *Brand* and *Taste*. On the other hand, the indicators *Sensuality, Same Gender, Opposite Gender, Racial Roots* and *Body Exposure* received higher attention from the consumers when compared with the designers and companies. If *Values* is the dimension 'end' of the chain, designers and companies should review their approaches to come closer to consumers' views (See Figure 4.47 in Chapter 4).

The continuous measurement of the *Attributes, Consequences* and *Values* within the *Means-End Chain* is suggested as an innovative way to target different types of consumers. The model offers the possibility of working with qualitative and quantitative data in a complementary and more assured way. Qualitative analysis can be conducted with data gathered from focus groups and the *Indicators* can be measured by surveys included in a consumer register with a loyalty card or similar approach. Figure 5.4 below shows the integration of the theories and analyses in order to find an appropriate interface model.
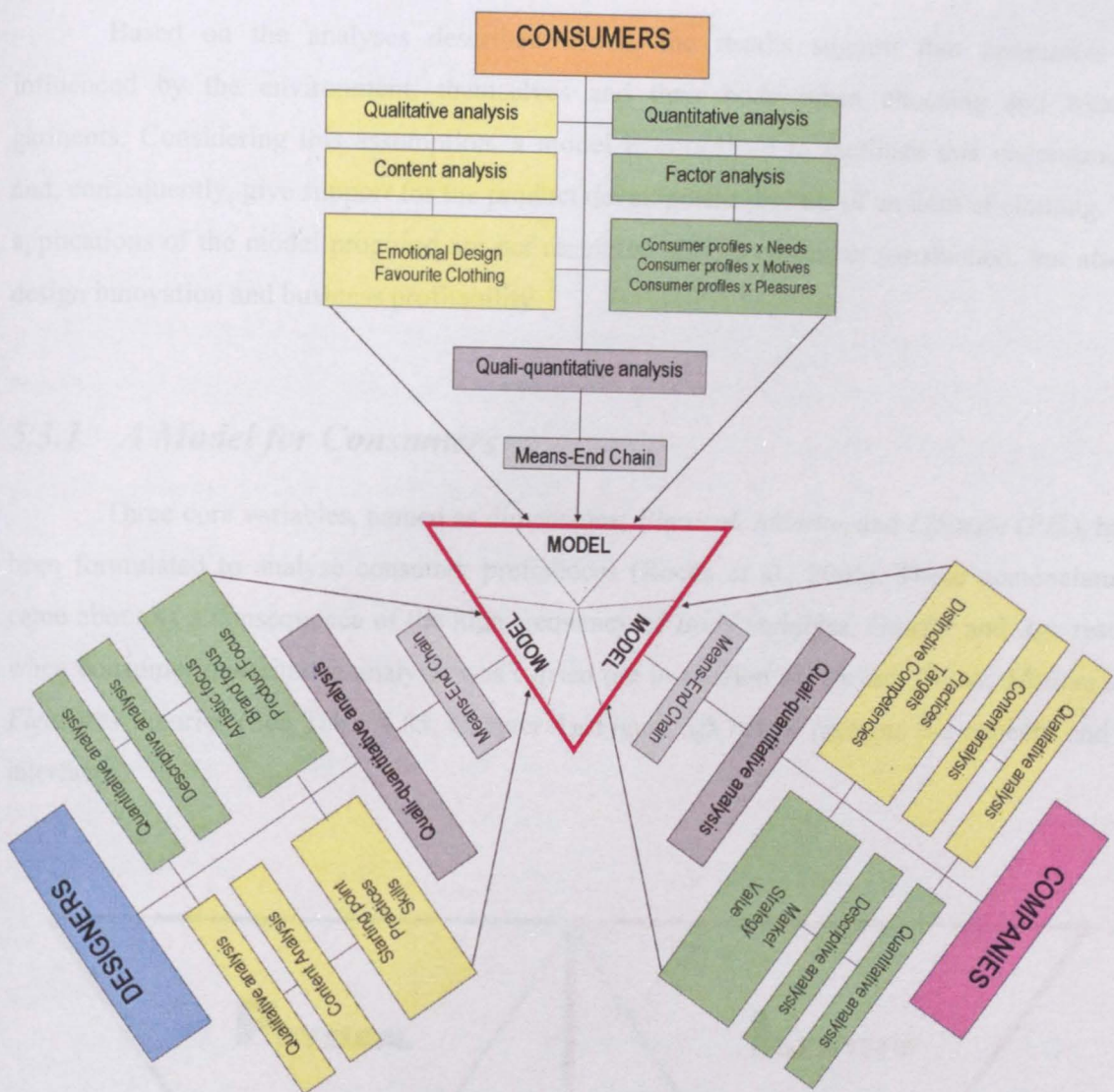
Figure 5.4 – The Interface between Methods and Theories

When comparing the results of the three stakeholders – consumers, designers and companies – it is seen as advantageous to develop a model that can be understood by all the stakeholders, so that it can satisfy their distinct needs, views and requirements in an integrated manner.

In developing the model, two main considerations should be taken into account: (1) the *Indicators for Fashion and Clothing Consumption* are crucial to understanding consumer needs and expectations, (2) the *Means-End Chain Model* seems to provide a good link between stakeholders as the theoretical concepts can be understandable and attractive to consumers, designers and companies.

5.3   MODEL CONCEPTION - ALL STAKEHOLDERS

Based on the analyses described above, the results suggest that consumers are influenced by the environment, themselves and their body when choosing and wearing garments. Considering this assumption, a model is conceived to facilitate this understanding and, consequently, give support for the product development process of an item of clothing. The applications of the model proposed are not restricted only to consumer satisfaction, but also to design innovation and business profitability.

5.3.1   A Model for Consumers

Three core variables, named as dimensions; *Physical*, *Identity*, and *Lifestyle* (*PIL*), have been formulated to analyse consumer preferences (Rocha et al., 2005). These nomenclatures came about as a consequence of the high frequency of *Body* variables, *Gender* and *Age* results when consumer quantitative analysis was carried out in relation to relevant *Needs*, *Motives* and *Pleasures* theories (See Table 4.85, Chapter 4). Figure 5.5 below presents the concept and its interfaces.
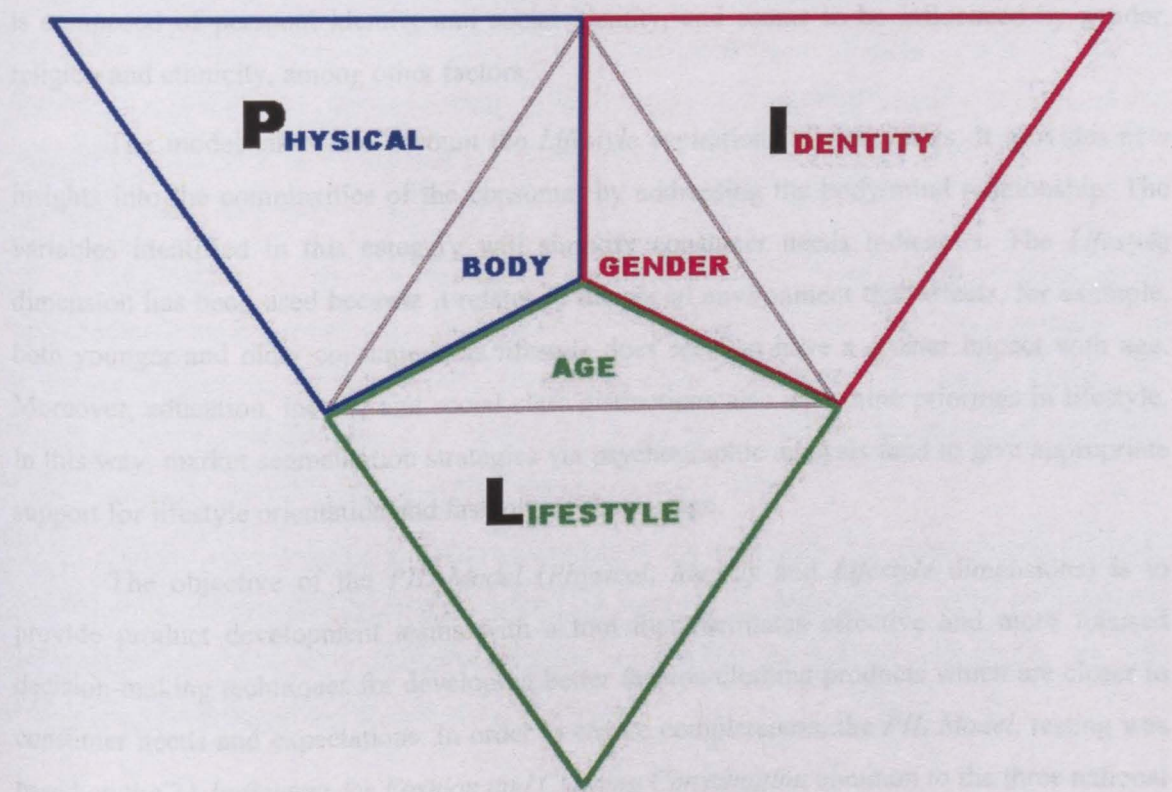
Figure 5.5 – The Consumer Model Concept and its Interface

296

The model takes into account the *Physical* dimension that affects all biotypes and ages. This indicates the primary role of anthropometrics, ergonomics and body shapes as important factors in developing products for older consumers, for example. The physical change and deterioration in body shape due to aging has to be addressed to ensure that the garments have appropriate fit and features to improve their quality. *Physical* dimension does change with age plus flexibility, reach, strength, structure and skin appearance amongst others. Moreover, physical differences are part of natural human diversity along with ethnicity and environment. A recent global demand for bigger sizes and heterogeneous shapes within catwalk shows, fashion magazine production and window display mannequins, also indicates the need for physical considerations by the fashion clothing industry.

The model takes into account *Identity* as an important factor when developing products for consumers that have strong fashion content. Other models that consider identity variables normally have a clothing perspective that stresses the functional attributes, rather than fashion attributes (Lamb and Kallal, 1992). According to Solomon and Rabolt (2004), the public self (how others see us) and private self (introspection) are both important in fashion and complementary to the adoption of an ideal of beauty model. The *Identity* dimension has been used because of the need for fashion products to be stylish. Identity, being a complex construct, is composed of personal identity and social identity, and seems to be influenced by gender, religion and ethnicity, among other factors.

The model takes into account the *Lifestyle* aspirations of consumers. It provides new insights into the complexities of the consumer by addressing the body/mind relationship. The variables identified in this category will simplify consumer needs indicators. The *Lifestyle* dimension has been used because it relates to the social environment that affects, for example, both younger and older consumers, as lifestyle does seem to have a greater impact with age. Moreover, education, income and social class distinctions also determine priorities in lifestyle. In this way, market segmentation strategies via psychographic analysis tend to give appropriate support for lifestyle orientation and fashion products usage.

The objective of the *PIL Model* (*Physical*, *Identity* and *Lifestyle* dimensions) is to provide product development teams with a tool that facilitates effective and more focused decision-making techniques for developing better fashion clothing products which are closer to consumer needs and expectations. In order to ensure completeness, the *PIL Model*, testing was based on the 31 *Indicators for Fashion and Clothing Consumption* common to the three national samples. The procedures carried out with *Needs*, *Motives* and *Pleasures*, in Chapter 4, were applied to the *PIL Model*. Table 5.1 outlines the *Indicators* within each of these three variables.

Table 5.1 – The Proposed PIL Model and the Indicators for Fashion and Clothing Consumption

	PHYSICAL	IDENTITY	LIFESTYLE
PIL **Model**	Functionality Climate Fabric Comfort Health Body Exposure Balance-Fit Physical Adequacy	Colour Boldness Taste Sensuality Beauty Attraction to Particular Clothes Be Noticed Personal Style Elegance	Exclusivity Fashion Ease-of-Care Profession Durability Opposite Gender Same Gender Moral Conventions Welfare Versatility Quality Brand Price Age Appearance

The *PIL Model* therefore, is defined as a business-oriented conceptual tool that provides better-targeting of fashion clothing consumption preferences. The *PIL Model* takes into account the way in which social values change in time towards using and wearing fashion products. Consumers today do not accept the attitudes of previous generations towards ageing identities and want to remain fashionable. Extensive research has been undertaken which explores ergonomic considerations for developing clothing products, especially for older consumers, but they do not address *Identity* and *Lifestyle* dimensions all together (Iltanen, 2003; Iltanen, 2005; Benktzon, 2003; Li, 2003).

The *PIL Model* has been developed to provide a holistic set of dimensions that need to be considered when producing stylish products for all consumers. It provides insights into consumer preferences and helps cross-functional teams to analyse their choices better. The impact of these three dimensions – *Physical, Identity* and *Lifestyle* - has been mapped in the following section, considering the three distinct national samples.

Using factor analysis the task was to group the *Indicators for Fashion and Clothing Consumption* into the *PIL Model* dimensions. The procedures followed the same set presented in Chapter 3 and used for quantitative analysis in Chapter 4. In the next subsections, the *PIL Model* analysis is tested and presented by nationality.

5.3.1.1   British Consumers

Reviewing the sequence of procedures adopted, within the Csmr-UK-2004 results it was noticed that the *Indicator* group for the *Physical* dimension was insufficient to guarantee the expected level for Cronbach's alpha coefficient, although the reliability coefficients for *Identity* and *Lifestyle* were adequate. The Barlett Test of Sphericity (BTS) and the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy have shown appropriate values. During the process of variable reduction in factor analysis, after 17 iterations some indicators were excluded to provide better reliability of the final factors. The best possible arrangements for the *PIL* dimensions are shown at Table 5.2.

Table 5.2 – Factor Analysis Results for Csmr-UK-2004 PIL Model Outcomes

Csmr-UK-2004		
PHYSICAL	**IDENTITY**	**LIFESTYLE**
Functionality	Boldness	Fashion
Climate	Sensuality	Profession
Fabric	Beauty	Same Gender
Health	Be Noticed	Quality
Balance-Fit	Elegance	Brand
α Cronbach = 0.48	α Cronbach = 0.63	α Cronbach = 0.62
KMO = 0.63	KMO = 0.71	KMO = 0.69
BTS χ^2 = 59.46	BTS χ^2 = 168.77	BTS χ^2 = 152.48
P = 0.000	P = 0.000	P = 0.000
33% of Variance explained	42% of Variance explained	41% of Variance explained

Investigating further, the next stage was to test the existence of a relationship between the *PIL* dimensions and the consumer profile variables. The procedures carried out with SPSS consider that when both *PIL* dimensions and *Consumer Variables* were ordinal, the gamma test was applied, and where the *Consumer Variables* were nominal, Mann-Whitney and Kruskal-Wallis tests were used. The results are shown in Table 5.3 below.

Table 5.3 - Cross Tabs PIL Model by Consumer Variables in the British Survey

Csmr-UK-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE
Physical	F>M P 0.011					g 0.182 P 0.008							
Identity	F>M P 0.000					g -0.193 P 0.003					g -0.251 P 0.026		
Lifestyle		OR>OC>NR>CP P 0.021	O>W P 0.003			g -0.226 P 0.000	g -0.189 P 0.029		g -0.213 P 0.045		g -0.237 P 0.027		

Notes: The orange cells indicates the relationship where P<= 0.05.
    The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.
        Religion categories: NR - No Religion; CP - Christian Protestant; OC - Other Christian and OR - Other Religion
        Ethnicity categories: W – white and O – other
        Gender categories: F – female and M – male
    Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Gender as a consumer profile variable presented relationships with the *Physical* and *Identity* dimensions. In both cases, British female consumers are more aware about the blend of *Functionality, Climate, Fabric, Health* and *Balance-Fit* and the combination of *Boldness, Sensuality, Beauty, Be Noticed* and *Elegance* than males.

A relationship was found between *Religion* and the *Lifestyle* dimension, which is composed of *Fashion, Profession, Same Gender, Quality* and *Brand*. The Other Religion category had more awareness about it than Other Christians, followed by the No Religion group of consumers and with Christian Protestant consumers as the group with the least awareness.

Consumers from Other Ethnic backgrounds also found the *Lifestyle* dimension more important than White consumers.

Analysing the variable *Age*, it can be said that it is the most relevant variable in relation to the *PIL Model* within the British sample, although the tendency of importance is not coincident for all dimensions. Older consumers have more concern about the *Physical* dimension in contrast to younger consumers who are more aware of *Identity* and *Lifestyle* dimensions. This result suggests that elderly people prefer more fashion clothing products with the *Physical* dimension enhanced, especially due to their bodily constraints.

Within the physical variables (blue cells in the table), shorter and slimmer female consumers considered *Lifestyle* more important. In the *Body Mass* variable, it was noticed that underweight consumers prioritise the *Identity* and *Lifestyle* dimensions. At this point, the interpretation can be complementary to the issue discussed above: the younger consumers, with more advantages in a bodily and image sense, tend to prioritise the individual and social dimension more than the physical one when choosing fashion clothing products.

5.3.1.2 Brazilian Consumers

The procedures to blend the *Indicators for Fashion and Clothing Consumption* into the *PIL* dimensions in the Brazilian database took place and the best outcomes of factor analysis after 17 iterations are shown in Table 5.4. It is important to highlight that the compilation of the *Indicators* into the *Dimensions* reached a very good Cronbach's alpha coefficient of reliability. The Barlett Test of Sphericity (BTS) and the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy also have shown very high values for the factor analysis reduction.

Table 5.4 – Factor Analysis Results for Csmr-BR-2004 PIL Model Outcomes

Csmr-BR-2004		
PHYSICAL	**IDENTITY**	**LIFESTYLE**
Functionality	Colour	Ease-Of-Care
Climate	Sensuality	Durability
Fabric	Beauty	Welfare
Body Exposure	Be Noticed	Price
Balance-Fit	Elegance	Age Appearance
α Cronbach = 0.68	α Cronbach = 0.69	α Cronbach = 0.63
KMO = 0.74	KMO = 0.74	KMO = 0.71
BTS χ^2 = 264.75	BTS χ^2 = 253.45	BTS χ^2 = 159.55
P = 0.000	P = 0.000	P = 0.000
46% of Variance explained	45% of Variance explained	40% of Variance explained

In the second stage of the analysis, an investigation into significant relationships between the *PIL Model* and the *Consumer Variables* was held and the results are shown in Table 5.5:

Table 5.5 - Cross Tabs PIL Model by Consumer Variables in the Brazilian Survey

Csmr-BR-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE
Physical	F>M P 0.000			g 0.172 P 0.023									
Identity													
Lifestyle	F>M P 0.021		NM>EW>OE>AB P 0.012										

Notes: The orange cells indicates the relationship where P<= 0.05.
The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.
Ethnicity categories: NM – native/mixed; EW – European/white; AB – African/black and OE – other ethnicity
Gender categories: F – female and M – male
Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Female Brazilian consumers are more concerned about *Physical* and *Lifestyle* dimensions than males. Native/Mixed consumers considered the *Lifestyle* dimension more important, followed by European/White descendents, Other Ethnic groups and those with an African/Black background were less concerned.

It is important to highlight that no correlation was found between any consumer variable and the *Identity* dimension in the Brazilian sample. This fact does not mean that these nationals neglected *Identity*, but may indicate that inside the sample no differences were found between the categories of each consumer variable. This result should be further investigated, as there is a possibility that the correspondence of individuality with fashion clothing products (*Colour*, *Sensuality*, *Beauty*, *Be Noticed* and *Elegance*) could be equally important for all Brazilian society, independent of *Age*, *Gender*, *Education*, *Body*, etc.

On the other hand, the physical variables (blue cells in the table) also do not present any significant correlation with the *PIL* dimensions. Considering what was commented upon before, it seems that although Brazilian body shapes are very diverse, there is no expressed difference between categories inside these variables, possibly meaning that these issues are important for all of the population.

5.3.1.3 *Chinese Consumers*

The same procedures carried out with British and Brazilian samples to build the *PIL Model* for the Chinese database were run, and the best configuration after 17 iterations is presented in Table 5.6, below. The Barlett Test of Sphericity (BTS) and the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy have shown appropriate values for the factor analysis reduction.

Table 5.6 – Factor Analysis Results for Csmr-CN-2004 PIL Model Outcomes

Csmr-CN-2004		
PHYSICAL	**IDENTITY**	**LIFESTYLE**
Fabric	Colour	Fashion
Comfort	Boldness	Opposite Gender
Health	Sensuality	Same Gender
Balance-Fit	Beauty	Welfare
	Be Noticed	Quality
	Elegance	
α Cronbach = 0.46	α Cronbach = 0.62	α Cronbach = 0.52
KMO = 0.63	KMO = 0.70	KMO = 0.61
BTS χ^2 = 38.74	BTS χ^2 = 139.57	BTS χ^2 = 84.45
P = 0.000	P = 0.000	P = 0.000
39% of Variance explained	35% of Variance explained	35% of Variance explained

Observing the reliability coefficient, it can be said that the combination of *Indicators* to form the *Physical* dimension presented a level which was less than expected. Due to the exploratory character of this research, the investigation progressed to run cross tabs with *Consumer Variables*. As the second stage of analysis, the investigation of significant relationships between the *PIL Model* and the *Consumer Variables* was carried out and the results are shown in Table 5.7:

Table 5.7 - Cross Tabs PIL Model by Consumer Variables in the Chinese Survey

Csmr-CN-2004	GENDER	RELIGION	ETHNICITY	EDUCATION	INCOME	AGE	HEIGHT FEMALE	HEIGHT MALE	WEIGHT FEMALE	WEIGHT MALE	BODY MASS	BODY SHAPE FEMALE	BODY SHAPE MALE
Physical			M>H P 0.034			g 0.199 P0.006		g -0.284 P0.024		g -0.284 P0.024			
Identity	F>M P 0.011							g -0.319 P0.016		g -0.319 P0.016			
Lifestyle	F>M P 0.007					g -0.266 P0.001		g -0.297 P0.012		g -0.297 P0.012	g -0.260 P0.025		

Notes: The orange cells indicates the relationship where P<= 0.05.
The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.
Ethnicity categories: H – Han and M – Manchu
Gender categories: F – female and M – male
Tables and procedures are fully presented at the Digital Appendix (CD-ROM).

Gender, as a consumer variable, presented significant relationships with the *Identity* and *Lifestyle* dimensions. In both cases, Chinese female consumers showed more awareness of them than Chinese male consumers.

The ethnic minority Manchu seemed to assign more relevance to the *Physical* dimension when compared with the Han majority ethnic group.

Following the trend of the two other national groups, the elderly intend to prefer fashion clothing products which consider physical issues, as older Chinese consumers are more aware of the *Physical* dimension (*Fabric, Comfort, Health* and *Balance-Fit*). On the other hand, the younger consumers give more emphasis to the *Lifestyle* dimension (*Fashion, Opposite Gender, Same Gender, Welfare* and *Quality*).

Within the physical variables, the shorter and slimmer male consumers are more concerned with all the three dimensions *Physical, Lifestyle* and *Identity* (*Colour, Boldness, Sensuality, Beauty, Be Noticed* and *Elegance*) compared to the taller and fatter ones. Underweight consumers are also more aware about the *Lifestyle* dimension. It is interesting to highlight that although females are generally more aware of these dimensions than men, when the sample is investigated considering body shape, males are more aware than females. This result suggests further investigation.

5.3.1.4 Consumer Comparison

Following the planned procedures, the comparison between national samples took place. The results in Table 5.8 indicated that the degree of importance given to the three *PIL* dimensions by British and Chinese consumers was substantially higher than that of consumers from Brazil. A reason for this result in Britain could be a reflection of the tradition of fashion and a consequence of a mature market: the consumer knows exactly what s/he is looking for. The explanation for the Chinese could be the recent changes in consumption, especially with fashion luxury brands. The reasons that the Brazilian consumer results did not show a tendency similar to the other countries could be explained by their changelessness in an emergent market context.

Table 5.8 - Cross Tabs Statistics between PIL Model and Consumer Variables by Nationality

DIMENSIONS	Csmr-UK-2004	Csmr-BR-2004	Csmr-CN-2004
Physical	Gender Age	Gender Education	Ethnicity Age Height Male Weight Male
Identity	Age Body Mass	-	Gender Height Male Weight Male
Lifestyle	Gender Religion Ethnicity Age Height Female Weight Female Body Mass	Gender Ethnicity	Gender Age Height Male Weight Male Body Mass

Based on the survey results and theoretical comparative literature review, it is possible to point out that while British consumers tend to prefer fashion clothing products in an individual context, Chinese consumers prefer clothes with functional implications. On the other hand, although there are weak relationships, a tendency is observed for Brazilian consumers to prefer a social connection. The fashion clothing industry is urged to consider, within the product development process, all three dimensions that comprise the *PIL Model*. This need seems to be strictly linked with seeking success in the fashion clothing products concept, production, and product offer.

Considering that one of the aims of this research is to find a methodological tool to fit the interest of three stakeholders, the next sections present the procedures of investigation and interpretation in order to build an interfacing model.

5.3.2   A Model for Designers

Reviewing the previous research procedures, designers were questioned on the *Artistic, Brand* and *Product* aspects of their work. The literature review discussed points that can justify these three different approaches to design professionals, and a balance between them is most desirable.

The results show how designers tend to be subjective in their practices, and when they get out of their 'cocoon' they tend to follow the company route more than the consumer route.

Considering designers as one of the key actors in the relationship between companies and consumers, some considerations arose. In most cases, the marketing department is expected to have close communication with the design department within companies. However, it is known that there is a lack of communication between them, with both sides claiming to have difficulty understanding each other's language. It is true that the nature and responsibility of these two types of professionals is different and their educational backgrounds often do not have similarities, but any initiative to stimulate designers and managers to communicate more effectively is more than desirable.

Considering this, although the *PIL Model* can provide numerous insights and nurture the profile of the consumer, this tool can be improved if some more market-led tools were used in association with it. The *Physical* dimension reminds the designer that the consumer is a human being, real and with a body; the *Identity* dimension stresses the individuality of each consumer; the *Lifestyle* dimension helps the designer to put the consumer within a social context, but the model still seems to lack a fully logical order to help designers to build a story and a context to illustrate their collections. Moreover, this connection should not stimulate only the *Artistic* and *Product* sides of the designers' practices, but also enhance his/her *Brand* side. In addition, the model's approach should help the designers to engage more closely with the managers.

The analysis of the *Means-End Chain* showed that, with the application of this model theory, it is feasible to identify the paths consumers are taking. The analysis showed also the applicability of this theory to product development teams, providing a logical way of thinking from the point of view of the consumer. The *Attributes* support the designer's understanding about what needs to be considered in order to turn a project into a product, for example, from price to comfort. The *Consequences* help the designers to express the benefits that consumers will have when experiencing the product, for example, from trends to exclusivity. The *Values* show designers the intangible elements the product is expected to embody, for example, from brand to ideology.

At this stage, the most suitable model seems to be the *PIL Model* overlayed by the *Means-End Chain* (*ACV*) model. Figure 5.6 below shows the proposed framework.

As a well-known management tool, the *Means-End Chain* seems also to facilitate the interaction between designers, managers and other teams working within the company. Also, the communication between product development and marketing departments can have more synergy and become more effective.
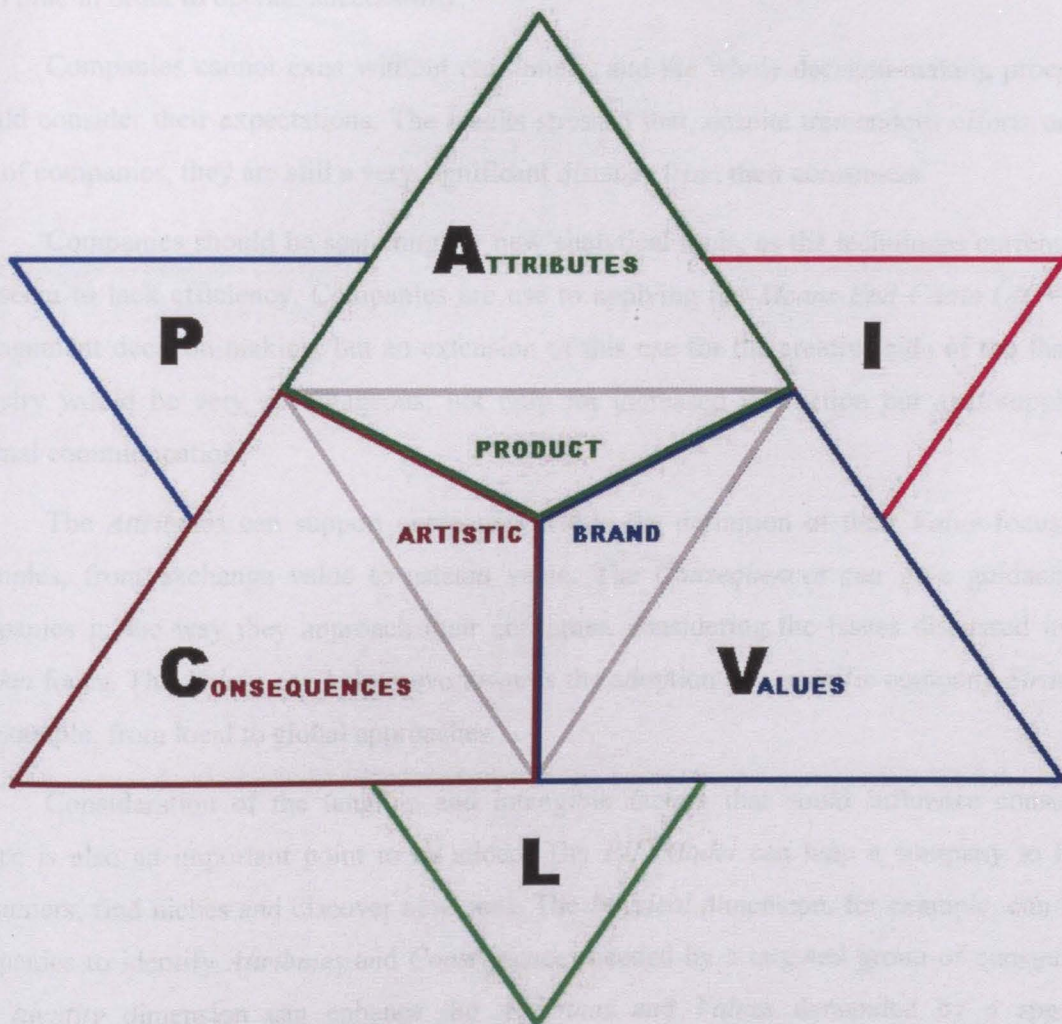
Figure 5.6 - The Superimposition of the PIL and ACV Models for Designers

According to Jones (2003), the biggest challenge for a designer is to include rationality and intuition within his/her creative process. This combination of ways of thought is hard to obtain due to the cultural tendency to keep them separated. The model presented above seems to contribute to the elimination of this gap.

Considering that one of the aims of this research is to find a most suitable model to fit the interest of the three investigated stakeholders (consumers, designers and companies), the next section presents the modelling stage from the managers' viewpoint.

5.3.3 A Model for Companies

The theories discussed in the Literature Review chapter and the data analysed in previous sections showed that companies have a set of definitions relating to *Market, Strategy* and *Value* in order to operate successfully.

Companies cannot exist without consumers, and the whole decision-making processes should consider their expectations. The results stressed that, despite tremendous efforts on the part of companies, they are still a very significant distance from their consumers.

Companies should be searching for new analytical tools, as the techniques currently in use seem to lack efficiency. Companies are use to applying the *Means-End Chain (ACV)* for management decision-making, but an extension of this use for the creative side of the fashion industry would be very advantageous, not only for increased interaction but also supplying internal communication.

The *Attributes* can support companies within the definition of their *Value* focus, for examples, from exchange value to esteem value. The *Consequences* can give guidance to companies in the way they approach their consumer, considering the issues discussed in the *Market* focus. The *Values* can help move towards the adoption of a specific company *Strategy*, for example, from local to global approaches.

Consideration of the tangible and intangible factors that could influence consumer choice is also an important point to be added. The *PIL Model* can help a company to trace consumers, find niches and discover new ones. The *Physical* dimension, for example, can help companies to identify *Attributes* and *Consequences* needed by a targeted group of consumers. The *Identity* dimension can enhance the *Attributes* and *Values* demanded by a specific consumer. Furthermore, the *Lifestyle* dimension can assist companies in relation to the *Consequences* and *Values* the consumers want and expect within a fashion clothing product. Figure 5.7 below presents a suitable framework for the proposed model with the overlayers extracted from the issues just discussed.
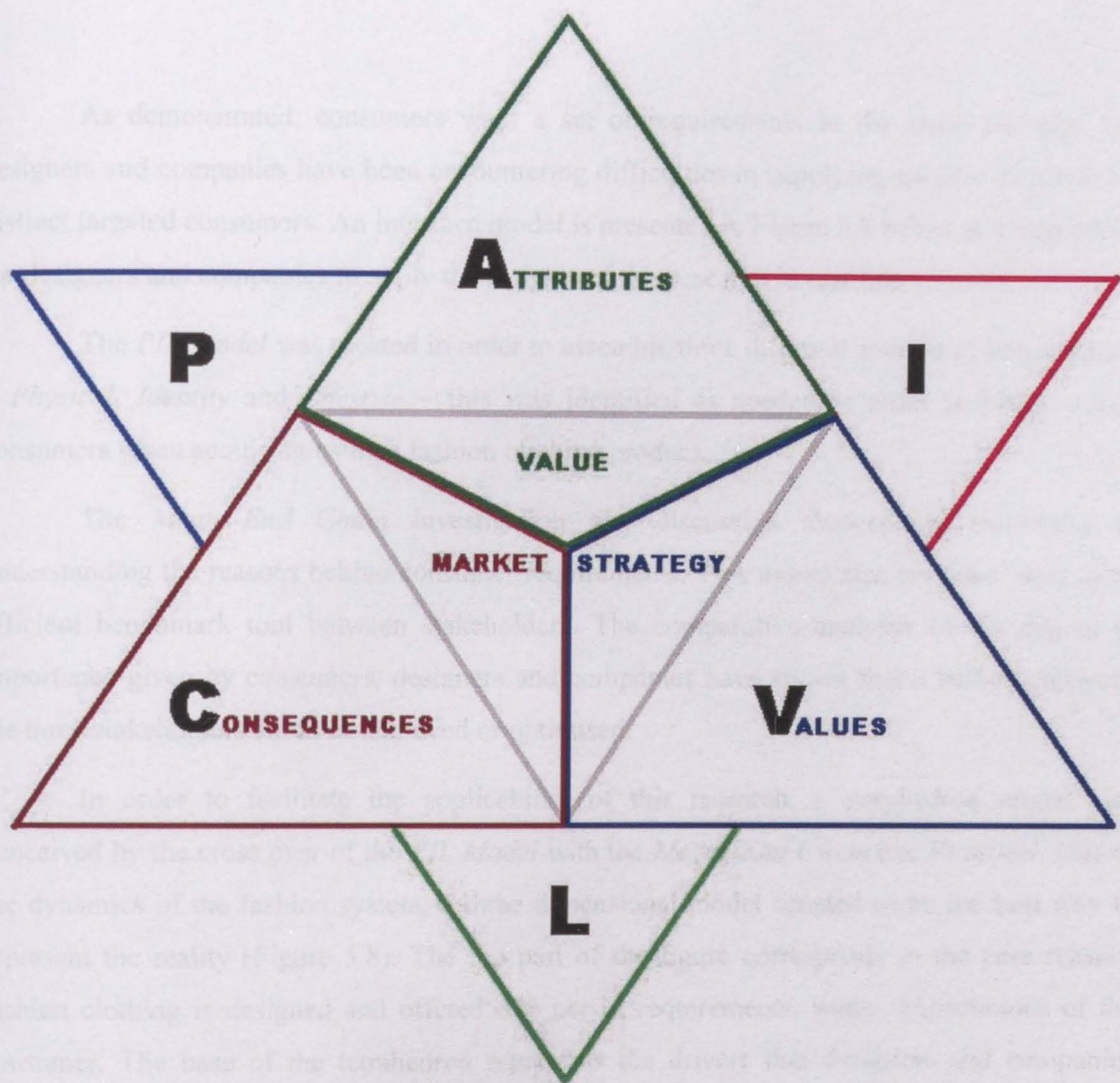
Figure 5.7 - The Superimposition of the PIL and ACV Models for Companies

Considering the dynamic character of the proposed model, the geometric representation should contemplate the possibility of the dimensions rotating around its axis. The next section presents an appropriate, concise model for the three stakeholder groups targeted in this research, refined by the preceding discussion.

5.3.4   A Model for All Stakeholders

The analyses of data from the consumers, designers and companies using a specific theoretical framework led to an intersection of models that should contribute to the success of fashion clothing items if taken into consideration during the product development process.

As demonstrated, consumers want a set of requirements in the same package, and designers and companies have been encountering difficulties in supplying specific elements for distinct targeted consumers. An interface model is presented in Figure 5.8 below as a suggestion for designers and companies to apply the insights of this research to real life.

The *PIL Model* was created in order to assemble three different sources of requirements – *Physical*, *Identity* and *Lifestyle* – this was identified as needed in order to better satisfy consumers when acquiring/using a fashion clothing product.

The *Means-End Chain* investigation and discussion showed the relevance of understanding the reasons behind consumer requirements. This model also revealed itself as an efficient benchmark tool between stakeholders. The comparative analyses of the degree of importance given by consumers, designers and companies have shown that a balance between the three stakeholders could be achieved or optimised.

In order to facilitate the applicability of this research, a polyhedron model was conceived by the cross over of the *PIL Model* with the *Means-End Chain (ACV)* model. Due to the dynamics of the fashion system, a three dimensional model seemed to be the best way to represent the reality (Figure 5.8). The top part of the figure corresponds to the core reasons fashion clothing is designed and offered: the needs, requirements, wants, expectations of the consumer. The base of the tetrahedron represents the drivers that designers and companies should understand about consumers, without losing sight of their own interests, either artistic, brand or product focused, market, strategy or value focused, respectively.

The common task for the stakeholders is to select six of the most important *Indicators for Fashion and Clothing Consumption* for their target market, analyse them and fill the faces of the tetrahedron with these *Indicators*. This procedure will provide support to the brief in terms of what is important and essential in specific product development processes.
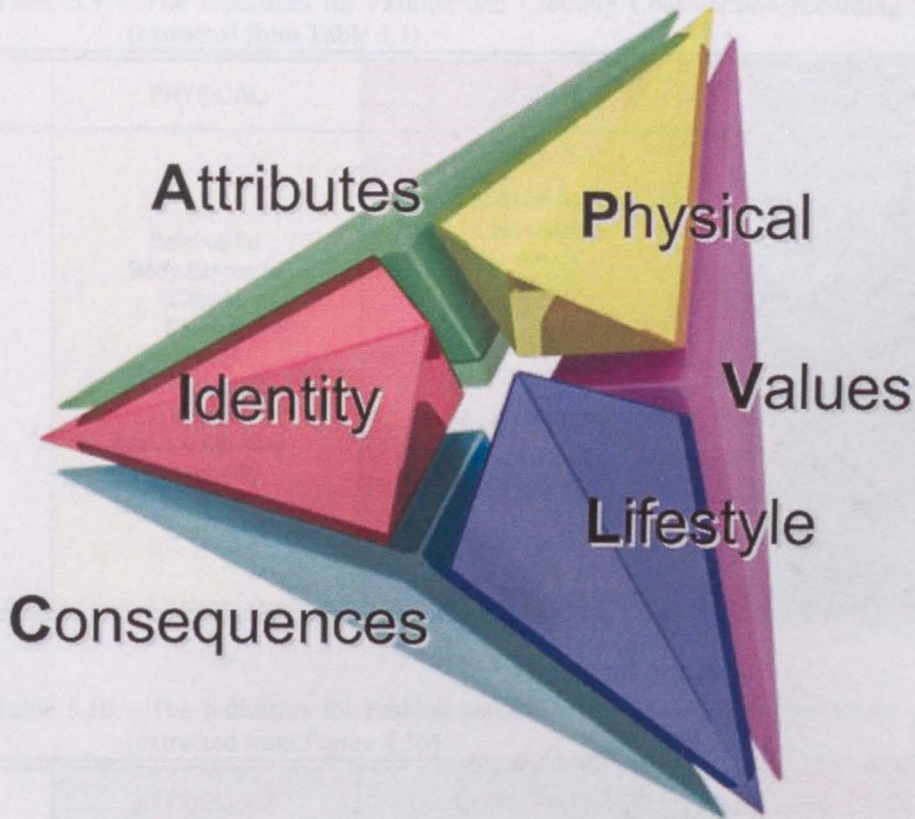
Figure 5.8 – The Fashion Product Development Polyhedron

The adoption of a geometric figure will help designers to memorize the consumers' needs and should support visuals and creative boards. The intriguing shape of the model also contributes to enhanced creativity, by the application of different colours, patterns and textures on its faces and edges or by the stimulation of any connection between the parts of the polyhedron and the current landscape. On the other hand, if any of the six parts is missing, the polyhedron does not stand up properly, as a reminder that all *PIL* and *ACV* dimensions should be considered by the designer.

It is important to highlight that each of the 38 *Indicators for Fashion and Clothing Consumption* can assume only one position within the combination *PIL* and one position within the combination *ACV*. Moreover, it is not desirable that an *Indicator* appears twice in one *Fashion Polyhedron*. Tables 5.9 and 5.10 show all the *Indicators* and their appropriate position within the *PIL* and *ACV* models, respectively.

Table 5.9 – The Indicators for Fashion and Clothing Consumption according to PIL Model (extracted from Table 5.1)

	PHYSICAL	IDENTITY	LIFESTYLE
PIL Model	Balance-Fit Body Exposure Climate Comfort Fabric Functionality Health Physical Adequacy Seasonality	Attraction to Particular Clothes Be Noticed Beauty Beliefs Boldness Colour Elegance Ideology Image Judgement Mood Personal Style Racial Roots Sensuality Taste	Age Appearance Brand Celebrity Influence Durability Ease-of-Care Exclusivity Fashion Moral Conventions Opposite Gender Price Profession Quality Same Gender Versatility Welfare

Table 5.10 – The Indicators for Fashion and Clothing Consumption according to ACV Model (extracted from Figure 4.35)

	ATTRIBUTES	CONSEQUENCES	VALUES
ACV Model	Balance-Fit Beauty Colour Comfort Fabric Functionality Price	Age Appearance Attraction to Particular Clothes Be Noticed Boldness Climate Durability Ease-of-Care Elegance Exclusivity Fashion Health Image Judgement Moral Conventions Physical Adequacy Profession Quality Seasonality Versatility Welfare	Beliefs Body Exposure Brand Celebrity Influence Ideology Mood Opposite Gender Personal Style Racial Roots Same Gender Sensuality Taste

Another resource to help designers and companies to memorize what is needed within the *Fashion Polyhedron* is to establish a sort of colour codification for each part of the geometric figure, corresponding to each dimension of *PIL* or *ACV* models. This procedure was adopted in this stage of the work in order to facilitate the comparison between the fictitious examples given in the following section. The colour code established is: yellow represents *Physical* dimension, the red represents the *Identity* dimension, the blue represents the *Lifestyle* dimension within the *PIL* model. The colour codification for *AVC* model is: bright green for the *Attributes* dimension, light blue for the *Consequences* dimension and pink for the *Values* dimension.

312

Taking into account that companies usually work in a diverse environment, with professionals from several distinct fields, the apparent simplicity of the *Fashion Polyhedron* can help in the visualisation of the aims of the company for a specific product, collection or season. Moreover, the facility to build the model with real material can give support to discussions within the decision-making board meetings (see a DIY example in Appendix). Furthermore, considering the social responsibility of the companies, the tetrahedron format can help in education and clarification from the companies' viewpoint about what they are offering to consumers, using colloquial language and visual and sensory resources.

In order to better comprehend the scope of the *Fashion Polyhedron*, the next section presents several fictitious examples of well-known fashion clothing brands. The illustrative examples were chosen based on the availability of the information via secondary data sources with an attempt to illustrate the everyday usage of the model within the three countries targeted by this research.

5.4   ILLUSTRATIVE EXAMPLES

The usage of well establish fashion clothing brands to exemplify the application of the *Fashion Polyhedron* required some information about the targeted consumers from each company, as well as its product position, distribution channel, promotional strategy, among other data. The evidence was gathered mainly from well establish consultancy companies such as Mintel and KSA. Facts and figures were also collected from the websites of the brands selected in order to demonstrate the applicability of this stage of the proposed model.

Considering that the most available data came from reports that have their focus on the European market, three examples of fashion clothing brands with high impact, in the British market, were chosen. Subsequently, two other examples are presented, showing brands that have their main markets in Brazil and China. Therefore, this section is subdivided into five subsections, each of them relating to one specific fictitious case study.

5.4.1   Example 1: TOPSHOP

TOPSHOP is one of the best known fashion brands for younger people in the United Kingdom. Their famous flagship store located in Oxford Circus, London, is considered a dream space by fashionistas. Although TOPSHOP is just one of eight brands in the Arcadia Group, Arcadia being one of the UK's leading retail specialists, TOPSHOP is heavily linked with high street fashion for young consumers.

According to Mintel Retail UK (2006c) consumer research, TOPSHOP has buying levels of 12% among women, with an orientation towards 15-24 year-old middle class consumers, although the retailer has quite a broad demographic appeal – even fortysomethings are enticed to buy a 'funky' top to go under a classic suit for example. Moreover, the retail mainline prices are around £10-15 for tops, £24-50 for separates, and £60-90 for jackets.

The brand sponsors the New Generation section at London Fashion Week, and is a former sponsor of Graduate Fashion Week – underlining its commitment and involvement with emerging designer talent, and also generating even more positive publicity.

As consumer responsiveness activity, TOPSHOP offers, among other services, Personal Stylists; VIP changing rooms; a Concierge service 'to help you get the most from your shopping trip'; TOPSHOP To Go - fashion parties at customers' homes - and TOPSHOP Express, where the customers text orders to the Oxford Street store and they are delivered to their location the same day.

TOPSHOP is a very established British fashion brand in the UK and in July 2006, branch stores were also operating in Chile, Croatia, Cyprus, Denmark, Gibraltar, Iceland, Malta, Serbia/Montenegro, Slovenia, Spain, Sweden and Turkey; and the company has plans to cover Russia and the United States as well. One of the adverts on the TOPSHOP website says:

> 'Selling an average of 30 pairs of knickers a minute, 6,000 pairs of jeans a day and 35,000 pairs of shoes every week, it's an unrivalled, iconic brand. Blending cutting edge style with purse-friendly prices, TOPSHOP attracts women from their teens to the 40s searching for a weekly fashion fix.'

Describing the first case study, it is supposed that TOPSHOP wants to improve its Petite line, defined by them as: 'pieces made to fit women that are 5 ft 3 or under'.

In order to demonstrate the application of the *Fashion Polyhedron* with the TOPSHOP Petite Line, some procedures were established. Firstly, as the *Fashion Polyhedron* is based on the *Indicators for Fashion and Clothing Consumption*, it was necessary to select which of them were the most suitable indicators for the brand target. In reality, these indicators can be acquired by consumer research with the brand's clients, using the focus group technique, widely known by the marketing sector, to rank the 38 indicators, as an example.

On the other hand, it is known that some companies within the fashion industry often get help from sophisticated statistics methods of data collection and interpretation via consultancy to give support to their decision-making processes. Considering this, the five case studies presented in this section of the work have mainly a didactical approach to how to implement the *Fashion Polyhedron* in the designers and companies everyday practices.

It was decided to use the databases gathered within the British, Brazilian and Chinese consumers to select the best indicators for each of the targeted examples. Although this choice does not seem to give to the reader a clear idea of how simple and easy the building and interpretation of a specific *Fashion Polyhedron* is for a specific target group, the databases sourced are real and feasible for immediate implementation.

As TOPSHOP does not yet have Brazil or China as its target market, the data used will be extracted only from the UK-2004 consumer database. The core task is to investigate the *Indicators for Fashion and Clothing Consumption* priorities within the targeted group: upper middle-class, shorter, young women.

The following step is to check that at least one of the several indicators selected pertain to each category of *PIL Model*. Subsequently, the task is to classify at least three other indicators to fit into the *ACV Model*; in this way, designers and companies (managers, marketers, visual merchandiser, etc.) have a common priority to emphasize in their actions and decision-making process.

Reviewing the contents of Table 4.58 (Chapter 4), it is observed that some significant relationships were found between the *Indicators for Fashion and Clothing Consumption* and the consumer variables *Income* and *Education* (upper middle-class), *Age* (young women), *Height* (shorter) that can lead to an investigation of TOPSHOP's targeted group. Table 5.11 below shows the selected results.

315

Table 5.11 – Cross Tabs Indicators for Fashion and Clothing Consumption by TOPSHOP Petite Line Consumer Profile in the British Survey (extracted from Table 4.58, Chapter 4)

	EDUCATION	INCOME	AGE	HEIGHT FEMALE	PIL	ACV	Dimension selected to form the Fashion Polyhedron
Brand			g - 0.217 P 0.002	g - 0.237 P 0.014	L	V	L from PIL
Climate		g 0.187 P 0.013			P	C	Not selected
Functionality		g 0.216 P 0.006	g 0.234 P 0.002		P	A	A from ACV
Be Noticed			g - 0.151 P 0.032		I	C	Not selected
Opposite Gender			g- 0.285 P 0.000		L	V	Not selected
Personal Style			g - 0.342 P 0.000		I	V	V from ACV
Same Gender			g - 0.235 P 0.000		L	V	Not selected
Sensuality			g - 0.166 P 0.023		I	V	Not selected
Physical Adequacy		g 0.287 P 0.001			P	C	P from PIL
Colour	g 0.184 P 0.030				I	A	I from PIL
Durability			g - 0.222 P 0.001		L	C	C from ACV

Notes: The orange cells indicate the relationships where P<= 0.05. The figures in grey indicate a relationship not suitable for this analysis.

The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.

The cells in yellow indicate de Physical dimension, the red cells indicate the Identity dimension and the blue the Lifestyle dimension. The cells in bright green indicate the Attributes dimension, the turquoise cells indicate the Consequences, and the pink cells the Values dimension.

The positive relationship between *Education* and *Colour* indicates that the more educated the consumer, the more acute their awareness of *Colour*. A similar interpretation can be captured within *Income* and *Climate*, *Functionality* and *Physical Adequacy* – the positive relationship indicates an increase of importance with an increase in *Income*. The variable *Age* presented several negative relationships with the indicators *Brand*, *Be Noticed*, *Opposite Gender*, *Personal Style*, *Same Gender*, *Sensuality* and *Durability*, showing the increasing importance when the consumers are younger. Only one negative relationship was found between the *Height* of female consumers and the indicators, pointing out the importance of the *Brand* for shorter consumers.

The following step is to classify the *Indicators* with significance for the targeted consumers into the dimensions of the *PIL* and *ACV* models. Taking into account the Tables 5.9 e 5.10, at least one of the key *Indicators* (one of the eleven found in this example) should fit on each of the six parts of the *Fashion Polyhedron*, completing the guidance device for product development, marketing purposes or decision-making management.

As for these examples, the method adopted was based upon consideration of statistical figures, the last three columns in Table 5.11 shows the stages for getting the results. The selection of the final six *Indicators* to fulfil the *Dimensions* of the *Fashion Polyhedron* was via the observation and interpretation of the statistical gamma value and the coefficient of probability P within the significant relationships between the *Indicators* and the *Consumer Variables*. The lower the P value, the higher the probability that the relationship is true not only for the sample but for the population (universe) as well. If the criterion promotes any links, the decision is made by observing the gamma value as well as the appropriateness and the frequency of each *Indicator*. Table 5.12 below shows the final six *Indicators* selected to fulfil the *Dimensions* of the *Fashion Polyhedron* for TOPSHOP Petite Line.

Table 5.12 – The Final Six Indicators-Dimensions for TOPSHOP Petite Line

PIL Dimensions	PHYSICAL	IDENTITY	LIFESTYLE
Indicators	Physical Adequacy	Colour	Brand
ACV Dimensions	ATTRIBUTES	CONSEQUENCES	VALUES
Indicators	Functionality	Durability	Personal Style

It is important to highlight that other methods can be adopted for *Indicator* reduction or selection. As exemplified before, if the designer or the company get a considerable number of *Indicators* from a consultancy report or from focus group research, the criteria for selection can be totally qualitative and established by the stakeholders. In this case, there is no need for big samples or expensive and often time-consuming data collection.

The crucial consideration during the stage of *Indicator* selection, independent of the gathering method, should be that at least one of the *Indicators* selected needs to fit inside each of the appropriate *Dimensions* of the *PIL* or *ACV* models. At this stage, clear coding within the *Indicators-Dimensions* relationship should be helpful in avoiding misleading outcomes.

The proposed *Fashion Polyhedron*, composed of six key *Indicators* should give support to any initiative the company may have in relation to the upper middle-class shorter young female consumers. Figure 5.9 below shows a proposed result for the TOPSHOP Petite Line.
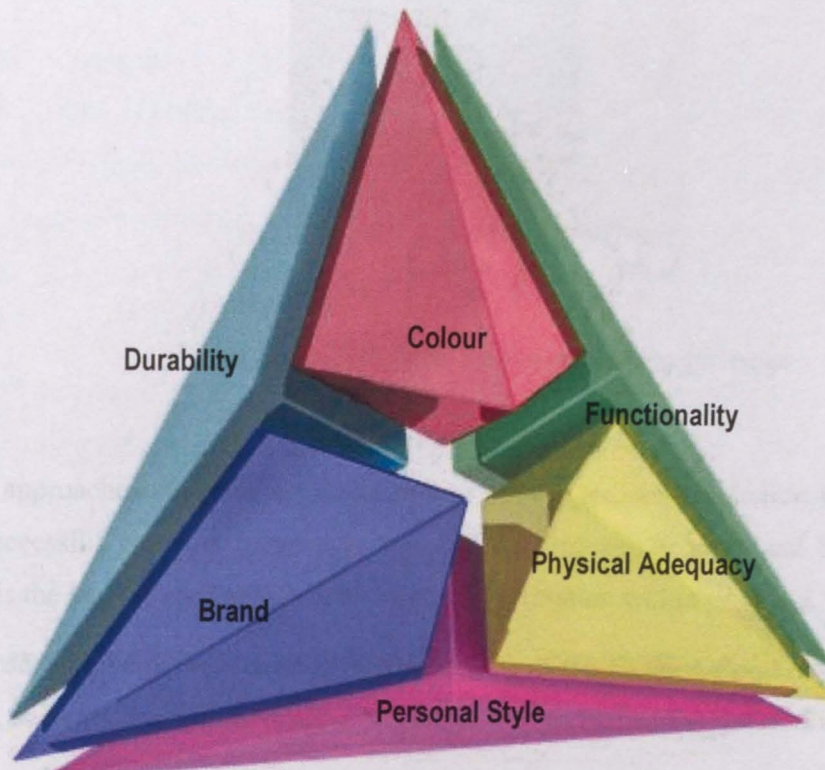
Figure 5.9 – The Fashion Polyhedron for TOPSHOP Petite Line

The TOPSHOP Petite Line should include consideration of the *Functionality* of the clothes as a key attribute, the concept of the product should reflect *Durability* and the value-added should be emphasised by the *Personal Style* the garment can contribute.

Moreover, the garments should be appropriately designed to promote *Physical Adequacy*; the palette of *Colours* should be carefully selected and the *Brand* identity should be enhanced. In order to help the reader to understand the atmosphere of TOPSHOP, Figure 5.10 below reproduces one of the images from the company's website.

TOPSHOP

Figure 5.10 – TOPSHOP Promotional Campaign Image

The approaches the company could pursue to get superior satisfaction from consumers and have successful products may vary. This freedom of action promoted by the *Fashion Polyhedron* is the key for endless possibilities of differentiation within products.

In order to give the reader better understanding of the *Fashion Polyhedron* proposed by this research, several other fictitious examples are presented in the next subsections.

5.4.2 Example 2: NEXT MENSWEAR

The second fictitious case study to exemplify the *Fashion Polyhedron* is the Menswear line of NEXT. The fashion clothing retailer NEXT is one of the best known brands in the United Kingdom.

According to Mintel Retail UK (2006c), NEXT has established a position in the market which could be said to be a younger person's M&S[18]. The ranges no longer have that edge and the core customer group is 25-45 year-olds. NEXT is aimed at the middle section of the mass-market and is designed to be contemporary, stylish, good quality and value for money.

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[18] Marks & Spencer

NEXT is the UK's number three fashion retailer with 460 stores in the UK and Ireland, as well as around 100 franchised outlets overseas. Since launching the Next.co.uk website in 1999, NEXT has established itself as one of Europe's leading integrated multi-channel retailers of clothing. The online offer is identical to that of the print-based NEXT Directory – in effect, the Web pages are simply uploaded versions of the catalogue's pages. Various services have been added in recent years, for example a floral delivery service.

Mintel Menswear UK (2005b) reports that the menswear line was introduced into NEXT stores in 1984. Although the company says its typical menswear customer is aged 20-35, Mintel's research reports its formalwear market penetration peaks at 27% among 25-34 year-olds and for casualwear among 35-44 year-olds, although it still has some share up to the 45-54 age group. In socio-economic terms, it has a wide spread apart from Es, with its casualwear attracting more ABs and C1s[19].

NEXT has been extremely skilful in judging just how fashionable its customers want their clothing to be (Mintel, 2005b). Partly, this is because of its innate strength in having the catalogue to 'road test' a product before it goes into a store, but also because of the skill and focus of its buying teams. The main problem that could be envisaged is if there were to be a polarisation of its customer base into higher fashion and more classic customers, leaving it with a dilemma over whether to segment its offer to cater for their different demands.

The exercise this research illustrates is the application of the *Fashion Polyhedron* to enhance the NEXT Menswear line. Considering that the company has more experience and available reports in its Womenswear line, one of the core variables to investigate is *Gender*, in order to clarify the differences of awareness between male and female consumers. Taking into account that possibly the physical differences also imply distinctive priorities between men and women, the *Height*, *Weight* and *Body Shape* consumer variables also need to be evaluated. Finally, as the company declares that its target is younger consumers, the *Age* variable is also worth examining.

According to the methods adopted at this stage of the work, the data interpreted was extracted from the Table 4.58 (Chapter 4), which referred to the UK-2004 consumer database. Table 5.13 below shows the results.

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[19] The letters A, B, C, D and E in this context mean social class, where the former is the higher and the last is the lowest.

Table 5.13 – Cross Tabs Indicators for Fashion and Clothing Consumption by NEXT Menswear Line Consumer Profile in the British Survey (extracted from Table 4.58, Chapter 4)

Csmr-UK-2004	GENDER	AGE	HEIGHT MALE	WEIGHT MALE	BODY SHAPE MALE	PIL	ACV	Dimension selected to form the Fashion Polyhedron
Brand	M>F P 0.035	g - 0.217 P 0.002				L	V	L from PIL
Climate	F>M P 0.054		g- 0.285 P 0.011			P	C	P from PIL
Boldness				g - 0.331 P 0.008		I	C	I from PIL
Be Noticed	F>M P 0.000	g - 0.151 P 0.032				I	C	Not selected
Exclusivity	M>F P 0.000	g 0.214 P 0.002				L	C	C from ACV
Opposite Gender	F>M P 0.034	g- 0.285 P 0.000		g- 0.309 P 0.006		L	V	Not selected
Personal Style		g - 0.342 P 0.000		g - 0.400 P 0.000		I	V	V from ACV
Same Gender	F>M P 0.019	g - 0.235 P 0.000				L	V	Not selected
Sensuality	F>M P 0.000	g - 0.166 P 0.023				I	V	Not selected
Comfort	M>F P 0.008	g 0.284 P 0.000	g - 0.295 P 0.015			P	A	A from ACV
Durability		g - 0.222 P 0.001				L	C	Not selected
Taste					O>V>A P 0.049	I	V	Not selected
Welfare	F>M P 0.000		g - 0.304 P 0.041			L	C	Not selected

Notes: The orange cells indicate the relationships where P<= 0.05. The figures in grey indicate a relationship not suitable for this analysis.

The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.

Gender categories: F – female and M – male

Body Shape categories: A, V, X and O forms for females; A, V and O forms for males

The cells in yellow indicate de Physical dimension, the red cells indicate the Identity dimension and the blue the Lifestyle dimension. The cells in bright green indicate the Attributes dimension, the turquoise cells indicate the Consequences, and the pink cells the Values dimension.

Significant relationships were found between *Gender* and the indicators *Brand*, *Exclusivity* and *Comfort* that are prioritised by male consumers compared with females. The negative relationship between *Age* and the indicators *Brand, Be noticed, Opposite Gender Personal Style, Same Gender, Sensuality* and *Durability* indicates that the lower the age of the consumer, the more aware they were of these indicators within a fashion clothing product.

Similar interpretation can be seen within *Height* and *Weight* consumer variables and the indicators *Climate, Comfort* and *Welfare* for the former, and *Boldness, Opposite Gender* and *Personal Style* for the latter – the negative relationship indicates the increasing importance of the indicator with decrease in *Height* or *Weight*. The variable *Body Shape* presented a significant relationship with the indicator *Taste*, whereas the awareness is higher for consumers with 'O' figure, followed by consumers with 'V' figure, and lastly the consumers with 'A' body profile.

The next procedure is to reduce the thirteen indicators shown in Table 5.10 into the six that will fill the parts of the *Fashion Polyhedron*. For this stage, the statistics were observed, firstly considering the value of the probability P and later the statistical test value, frequency and appropriateness. The most appropriate combination of indicators to fit the NEXT Menswear Line target considering the *PIL* and *ACV* models is presented at Table 5.14 below.

Table 5.14 – The Final Six Indicators-Dimensions for NEXT Menswear Line

PIL Dimensions	PHYSICAL	IDENTITY	LIFESTYLE
Indicators	Climate	Boldness	Brand
ACV Dimensions	ATTRIBUTES	CONSEQUENCES	VALUES
Indicators	Comfort	Exclusivity	Personal Style

Following the planned steps, the selected *Indicators for Fashion and Clothing Consumption* were placed on each part of the *Fashion Polyhedron*, Figure 5.11 below shows a proposed result for the NEXT Menswear Line.
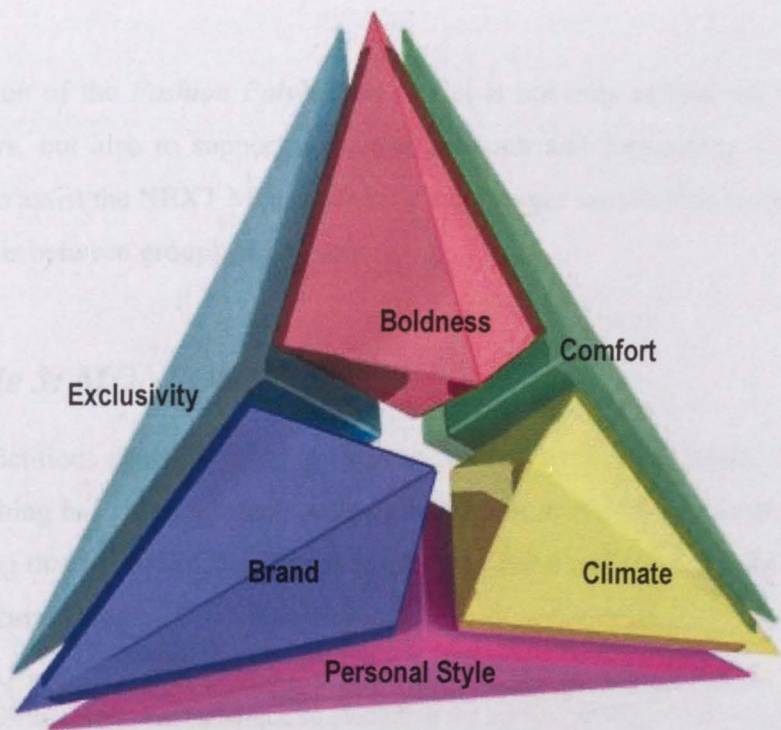
Figure 5.11 – The Fashion Polyhedron for NEXT Menswear Line

NEXT's Menswear Line, in fact, should consider the *Comfort* of the clothes as a key attribute, the concept of the product should reflect *Exclusivity* and the value-added should be emphasised by the *Personal Style* the garment can reflect.

In addition, the garments should be appropriately designed to be compatible with *Climate*; some characteristics of *Boldness* should be added and the *Brand* identity should be reinforced. Figure 5.12 below shows one of the images currently available on the company's website.
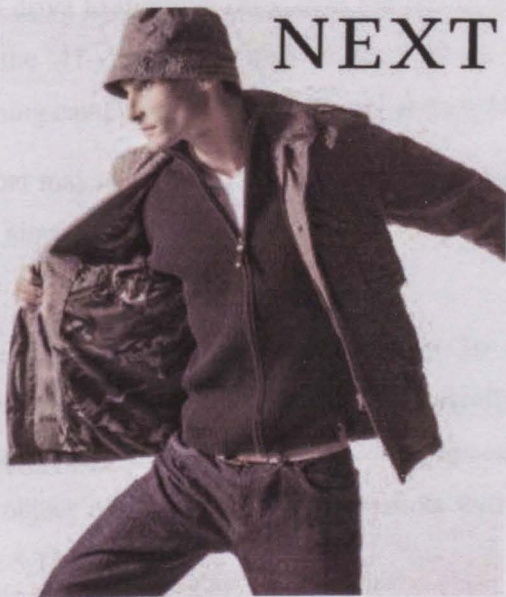
Figure 5.12 – NEXT Meanswear Promotional Campaign Image

The intention of the *Fashion Polyhedron* model is not only to find out current needs from the consumers, but also to support consumer research and forecasting. The completed polyhedron can also assist the NEXT Menswear Line's consumer satisfaction evaluation and the comparative analysis between groups of consumers.

5.4.3   *Example 3: MONSOON*

The third fictitious example given to illustrate this research is the retailer MONSOON. MONSOON's clothing has an exotic feel, without being unsuitable for mainstream customers. The type of clothing that MONSOON offers is inspired by boho and ethnic issues, but modern. The company's website states:

> 'MONSOON has developed a strong brand with a highly distinctive identity. The intrinsic beauty of fabric, colour and technique so evident in the early sourcing of MONSOON's products from the Far East continues to exercise a strong influence. Today MONSOON's team of talented designers gather inspiration and ideas from around the world to create the individual MONSOON look.'

The brand targets the middle-mass market and upwards and offers a wide size range, from 6 to 22 (UK sizing). The age spectrum is wide, with women from 20 to late 40s catered for. According to Mintel Retail UK (2006c), at the end of May 2006, the group operated 358 stores in the UK and Ireland, with around 350 additional stores in 35 other countries.

Recently, a report in the Telegraph (2007) stated that over the next few months the chain has plans to enhance its more affordable Fusion range, which is aimed at younger customers.

Curiously, as part of a drive to improve sales over the rest of the year (2007), the firm has contracted Liz Hurley, the 41-year-old British actress whose husband is an Indian millionaire, for its new advertising campaign 'Create A Storm' at their MONSOON shops.

Considering the fact that maybe Liz Hurley is a celebrity not young enough to endorse the Fusion range, this research aims to fictitiously illustrate the *Fashion Polyhedron* results for a more mature womenswear line.

At this point the exercise is to analyse the *Indicators for Fashion and Clothing Consumption* most preferred by older consumers, observing the significant relationships with the consumer variable *Age*. Moreover, due to the strong ethnic appeal MONSOON has, the variable *Ethnicity* is also an object of investigation. The results extracted from Table 4.58 (Chapter 4) are shown in Table 5.15 below.

Table 5.15 – Cross Tabs Indicators for Fashion and Clothing Consumption by MONSOON Mature Line Consumer Profile in the British Survey (extracted from Table 4.58, Chapter 4)

Csmr-UK-2004	ETHNICITY	AGE	PIL	ACV	Dimension selected to form the Fashion Polyhedron
Brand	O>W P 0.015	g - 0.217 P 0.002	L	V	V from ACV
Ease-of-Care		g 0.251 P 0.000	L	C	Not selected
Fashion	O>W P 0.001		L	C	L from PIL
Profession	O>W P 0.045		L	C	Not selected
Functionality		g 0.234 P 0.002	P	A	Not selected
Boldness	O>W P 0.020		I	C	I from PIL
Exclusivity		g 0.214 P 0.002	L	C	Not selected
Age Appearance	O>W P 0.014		L	C	C from ACV
Comfort		g 0.284 P 0.000	P	A	P from PIL
Fabric		g 0.247 P 0.000	P	A	A from ACV
Health	O>W P 0.004		L	C	Not selected
Price		g 0.166 P 0.022	L	A	Not selected

Notes: The orange cells indicate the relationships where P<= 0.05. The figures in grey indicate a relationship not suitable for this analysis.
The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.
Ethnicity categories: W – white and O – other
The cells in yellow indicate de Physical dimension, the red cells indicate the Identity dimension and the blue the Lifestyle dimension. The cells in bright green indicate the Attributes dimension, the turquoise cells indicate the Consequences, and the pink cells the Values dimension.

As the consumer variable *Ethnicity* is a nominal variable, the analysis using the Mann-Whitney test compares the ranks between categories. In this specific case MOONSON Mature Line, several significant relationships were found between *Ethnicity* and the indicators *Brand*, *Fashion, Profession, Boldness, Age Appearance* and *Health*. In all these cases, consumers from Other Ethnicities have shown more awareness within these indicators than White consumers. The variable *Age* presented several positive relationships with the indicators *Ease-of-Care, Functionality, Exclusivity, Comfort, Fabric* and *Price*, showing increasing importance when the *Age* of the consumer is also increasing.

By adopting the following steps, the twelve *Indicators* with significant relationship with *Consumer Variables* for this example can be reduced to six. The selection took into consideration the probability P of each relationship as well as the statistics test figures and appropriateness of the indicators. Table 5.16 below shows the final six *Indicators* selected to fulfil the *Dimensions* of the *Fashion Polyhedron* for MONSOON Mature Line.

Table 5.16 – The Final Six Indicators-Dimensions for MONSOON Mature Line

PIL Dimensions	PHYSICAL	IDENTITY	LIFESTYLE
Indicators	Comfort	Boldness	Fashion
ACV Dimensions	ATTRIBUTES	CONSEQUENCES	VALUES
Indicators	Fabric	Age Appearance	Brand

The classification of the *Indicators* with significant relationships with the targeted *Consumer Variables* took place considering its category within the *PIL* and *ACV* models that form the *Fashion Polyhedron*. The best result considering the statistical tests and the probability is shown in the Figure 5.13 below.
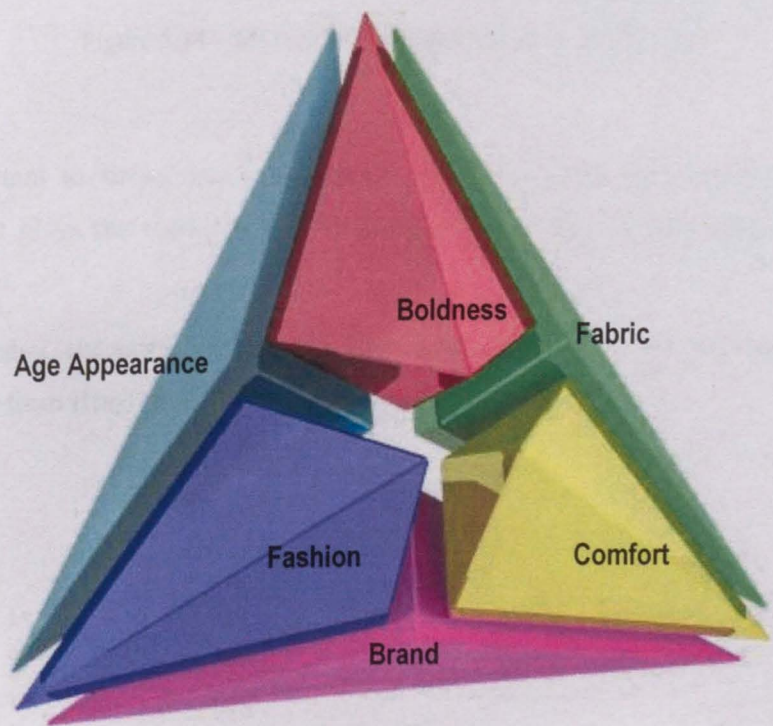
Figure 5.13 – The Fashion Polyhedron for MONSOON Mature Line

The *Fashion Polyhedron* shows guidance for MONSOON if the company intends to launch a line for older women. The garments should be made of appropriate *Fabric*, promoting a desirable younger *Age Appearance*, and focusing the identity of the *Brand* itself.

The clothes indeed should promote *Comfort* for the consumers, with crucial elements of *Boldness* and *Fashion* trends. One of the images from the mentioned campaign for MONSOON with Liz Hurley is shown below in Figure 5.14.
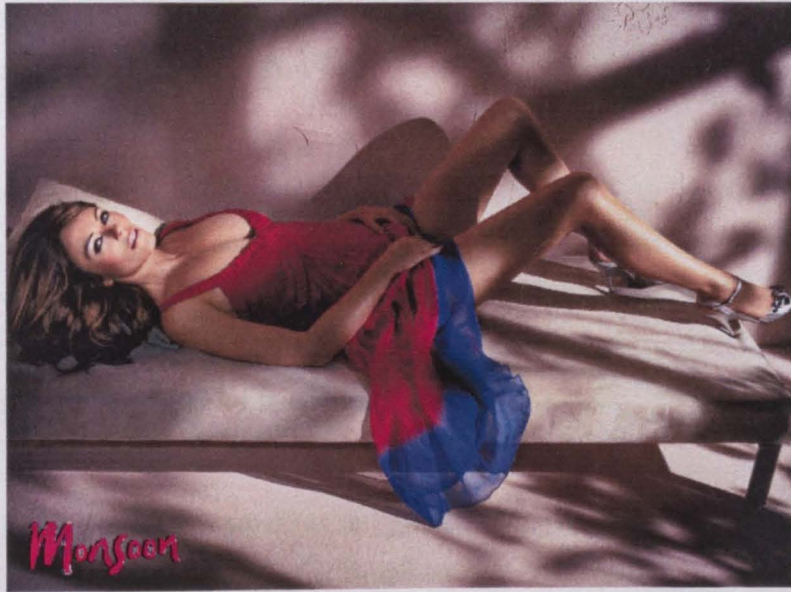
Figure 5.14 – MONSOON Promotional Campaign Image

It is important to stress that this example does not judge the current products the company offers but gives the reader a better understanding of the broader application of the *Fashion Polyhedron*.

Moving further, the next examples are illustrated by two selected well-known fashion clothing companies from Brazil and China.

5.4.4   Example 4: M.OFFICER

The example of an application for the *Fashion Polyhedron* was carried out with the Brazilian brand M.OFFICER. The company, founded in 1986 by Carlos Miele has its focus on young female and male consumers, from 15 to 24 years old. The message behind the brand relates to art, culture, and more recently, ethics and social responsibility.

M.OFFICER was classified as the coolest jeanswear brand in Brazil in 2006, as a result of research conducted by the Research International Institute (Folha SP, 2006). The company is also well-known as one of the best promoters of Brazilian popular culture. The catwalk shows presented at São Paulo Fashion Week often blend elements of modernity, art craft, racial roots and syncretism.

More recently, the big challenge for Carlos Miele is the recognition of his work internationally. He passed the management of M.OFFICER to executives in 2003 and launched his top line brand with his own name (Isto É, 2006). Carlos Miele has a flagship shop in New York, located in the Meat Packing District, and each season his collection is included on the New York Fashion Week. In 2006 he launched a casualwear top line called Miele by Carlos Miele.

The M.OFFICER brand has stockists in 23 countries and in Brazil owns 65 shops and has 32 franchise shops in the most influential Brazilian cities. The company targets consumers from A1, A2, B1 and B2 economic classes. Considering an evidence free comment, the researcher classifies M.OFFICER as a Brazilian national brand that corresponds to the Italian brand Diesel.

Considering that *Education* is a variable with a strong connection to *Income* in Brazilian society, both consumer variables were considered in the investigation. As M.OFFICER targets younger consumers, *Age* is also a crucial variable to consider. Table 5.17 below shows the selected significant relationships relevant to the study of this brand.

Table 5.17 – Cross Tabs Indicators for Fashion and Clothing Consumption by M.OFFICER Consumer Profile in the Brazilian Survey (extracted from Table 4.59, Chapter 4)

Csmr-BR-2004	EDUCATION	INCOME	AGE	PIL	ACV	Dimension selected to form the Fashion Polyhedron
Beauty			g- 0.143 P 0.034	I	A	Not selected
Versatility		g 0.133 P 0.044		L	C	Not selected
Boldness	g - 0.143 P 0.021	g - 0.177 P 0.003	g - 0.124 P 0.029	I	C	I from PIL
Be Noticed			g - 0.171 P 0.015	I	C	C from ACV
Opposite Gender			g - 0.143 P 0.017	L	V	V from ACV
Quality		g 0.132 P 0.035		L	C	Not selected
Same Gender			g - 0.155 P 0.009	L	V	V from ACV
Age Appearance		g 0.149 P 0.038		L	C	L from PIL
Balance-Fit	g 0.216 P 0.011	g 0.168 P 0.030	g 0.172 P 0.024	P	A	P from PIL
Fabric	g 0.148 P 0.031	g 0.156 P 0.013	g 0.128 P 0.040	P	A	A from ACV

Notes: The orange cells indicates the relationship where P<= 0.05. The figures in grey indicate a relationship not suitable for this analysis.

The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.

The cells in yellow indicate de Physical dimension, the red cells indicate the Identity dimension and the blue the Lifestyle dimension. The cells in bright green indicate the Attributes dimension, the turquoise cells indicate the Consequences, and the pink cells the Values dimension.

The positive relationships between *Education* and the indicators *Balance-Fit* and *Fabric* indicate that the more educated the consumer, the more acute their awareness is of these indicators. Similar interpretation can be identified within *Income* and the indicators Versatility, Quality, Age Appearance, Balance-Fit and Fabric – the positive relationship indicates the increase in importance with increase in *Income*. The variable *Age* presented several negative relationships with the indicators *Beauty, Boldness, Be Noticed, Opposite Gender* and *Same Gender*, showing the increasing importance of these indicators when the *Age* of the consumer is decreasing.

Remembering that the methods for reduction and selection of the ten indicators shown in Table 5.17 into the six key indicators for this specific example considered the probability P of the relationships, statistics test values, frequency and appropriateness of the Indicators. The best result to fulfil the dimensions of the *PIL* and *ACV* models for M.OFFICER is presented in Table 5.18 below.

Table 5.18 – The Final Six Indicators-Dimensions for M.OFFICER

PIL Dimensions	PHYSICAL	IDENTITY	LIFESTYLE
Indicators	Balance-Fit	Boldness	Age Appearance
ACV Dimensions	ATTRIBUTES	CONSEQUENCES	VALUES
Indicators	Fabric	Be Noticed	Gender

Hence, the *Fashion Polyhedron* for M.OFFICER, fulfilled by the most appropriate *Indicators* for its target consumer is shown in Figure 5.15 below. As both *Opposite Gender* and *Same Gender* were found to have a significant relationship with the *Consumer Variables*, they were blended into an unique indicator simply named as *Gender*.
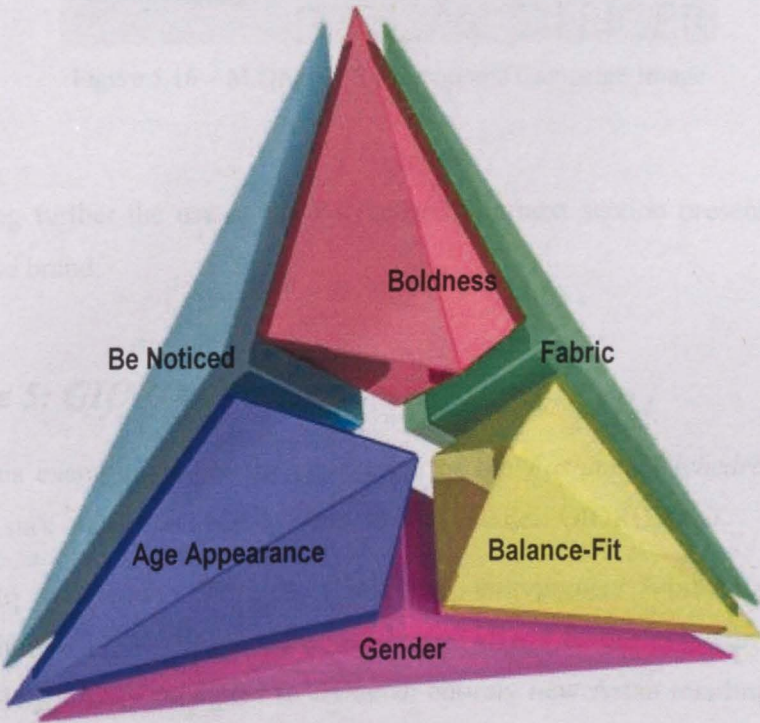
Figure 5.15 – The Fashion Polyhedron for M.OFFICER

The young consumer targeted by M.OFFICER expects that the garments use appropriate *Fabric*, and enhance the user, promoting him/her to *Be Noticed* in the crowd. Moreover, the consumers also desire clothes that can assist *Gender* issues, from the *Same Gender* competition to *Opposite Gender* attraction.

330

Besides, M.OFFICER designers should increase the awareness of the *Balance-Fit* attribute of their garments, and should prioritize the design of pieces with *Boldness* messages. Lastly, it should assist the shape and visuals in order to promote younger *Age Appearance* to consumers. An image from the company's website is shown in Figure 5.16 below.

Figure 5.16 – M.OFFICER Promotional Campaign Image

Exemplifying further the use of the Polyhedron, the next section presents a fictitious example of a Chinese brand.

5.4.5 *Example 5: GIORDANO*

The fictitious example chosen for application of the *Fashion Polyhedron* within the Chinese market is Asia's biggest and best-known clothing retailer: GIORDANO.

According to Asia Week (1999), the Hong Kong entrepreneur Jimmy Lai opened the first GIORDANO shop in 1983. The company was named after a favourite Italian restaurant of his in New York. GIORDANO attempted to create an entirely new Asian retailing experience, one characterised by aggressively courteous staff and a low-priced, high-volume line of colourful T-shirts and comfortable pants.

GIORDANO Ladies, meanwhile, is targeting a very select demographic: young trendy women who like personalised service. With 15 high-profile stores, mostly in Hong Kong and Taiwan, GIORDANO Ladies offers pricier, more stylised fashions for women. GIORDANO also currently offers menswear, but always has been about affordable fashion, with the feeling of 'this is nice and good value' to 'this is cheap.'

In a study released, in 2000, of top Asian brands, GIORDANO turned up as Asia's highest-ranking general apparel retailer. The report, conducted by independent international corporate identity consultant called Interbrand, placed GIORDANO at No. 20 on the list.

GIORDANO in 2000 had 430 shops in China, and nowadays, according to the company's website, has operations in Mainland China (728), Hong Kong (98), Taiwan (240), Korea (155), Japan (17), Philippines (44), Vietnam (5), Malaysia (56), Australia (56), Indonesia (75), Brunei (4), Singapore (50), Thailand (61), Myanmar (18), Middle East (115) and Aruba (10).

The company's website stated their vision as 'To be the best and the biggest world brand in apparel retailing', and their mission as 'To make people "feel good" & "look great"'. The researcher could classify GIORDANO as the Chinese GAP, within an evidence free comparison with the North-American Clothing giant.

The procedure taken was to propose a *Fashion Polyhedron* for GIORDANO starting by extracting from Table 4.60 (Chapter 4) the significant relationships between the Indicators and the consumer variables adhering to the target profile of the company. The variables *Education* and *Income* have a proxy character in the Chinese society and both should be observed (lower social class consumers). Besides, *Age* is also a very important variable for GIORDANO's target group (younger consumers). The results are presented in Table 5.19 below.

Table 5.19 – Cross Tabs Indicators for Fashion and Clothing Consumption by GIORDANO Consumer Profile in the Chinese Survey (extracted from Table 4.60, Chapter 4)

Csmr-CN-2004	EDUCATION	INCOME	AGE	PIL	ACV	Dimension selected to form the Fashion Polyhedron
Functionality		g - 0.214 P 0.017	g 0.427 P 0.000	P	A	P from PIL
Exclusivity			g - 0.158 P 0.044	L	C	Not selected
Opposite Gender			g - 0.362 P 0.000	L	V	V from ACV
Same Gender			g - 0.231 P 0.001	L	V	V from ACV
Sensuality			g - 0.216 P 0.007	I	V	Not selected
Balance-Fit		g - 0.187 P 0.034		P	A	A from ACV
Physical Adequacy	g - 0.272 P 0.050	g - 0.370 P 0.000	g 0.301 P 0.009	P	C	C from ACV
Colour	g - 0.230 P 0.033	g - 0.208 P 0.015	g 0.263 P 0.002	I	A	I from PIL
Price		g - 0.427 P 0.000		L	A	L from PIL

Notes: The orange cells indicates the relationship where P<= 0.05. The figures in grey indicate a relationship not suitable for this analysis.

The gamma result (g) with a + signal indicates a positive relationship between two ordinal variables, while the – signal indicates a negative relationship.

The cells in yellow indicate de Physical dimension, the red cells indicate the Identity dimension and the blue the Lifestyle dimension. The cells in bright green indicate the Attributes dimension, the turquoise cells indicate the Consequences, and the pink cells the Values dimension.

Analysing the significant relationship between *Education* and the indicators *Physical Adequacy* and *Colour*, it was observed that as in both cases the figures were negative, which indicates that the less educated the consumer, the more acute their awareness is of these two indicators. A similar interpretation can be given within *Income* and the indicators *Functionality, Balance-Fit, Physical Adequacy, Colour* and *Price* – the negative relationship indicates an increase in importance with decrease in *Income*. Moreover, the variable *Age* presented several negative relationships with the indicators *Exclusivity, Opposite Gender, Same Gender* and *Sensuality*, showing the increasing importance when the *Age* of the consumer is decreasing.

The selection of the final six *Indicators* to fulfil the *Dimensions* of the *Fashion Polyhedron* from the nine *Indicators* shown at Table 5.19, followed the observation and interpretation of the statistical gamma value and the coefficient of probability P within the significant relationships between the *Indicators* and the *Consumer Variables*. Table 5.20 below shows the final key six *Indicators* selected to fulfil the *Dimensions* of the *Fashion Polyhedron* for GIORDANO.

Table 5.20 – The Final Six Indicators-Dimensions for GIORDANO

PIL Dimensions	PHYSICAL	IDENTITY	LIFESTYLE
Indicators	Functionality	Colour	Price
ACV Dimensions	ATTRIBUTES	CONSEQUENCES	VALUES
Indicators	Balance-Fit	Physical Adequacy	Gender

After the significant *Indicators* were classified into the *PIL* and *ACV* dimensions, the best results were selected to fulfil the *Fashion Polyhedron* as Figure 5.17 shows below. As both *Opposite Gender* and *Same Gender* were found with significant relationships to the *Consumer Variables*, they were blended into a unique indicator simply named as *Gender*.
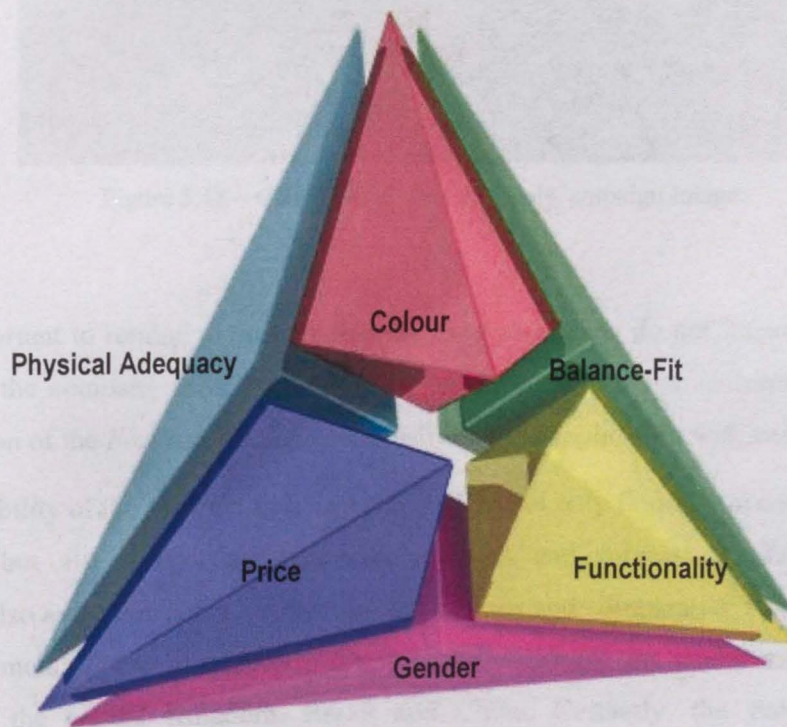
Figure 5.17 – The Fashion Polyhedron for GIORDANO

The proposed *Fashion Polyhedron*, should give support to any initiative the company may have in relation to the lower middle-class young consumers. GIORDANO, in order to offer successful products, should consider the *Balance-Fit* of the clothes as a key attribute, pursuing the best *Physical Adequacy* of the product concept, having in mind the awareness the users have of *Gender*, in both directions, from the competition between consumers from the *Same Gender* to the interest the *Opposite Gender* can promote.

Moreover, the garments should be appropriately designed according to *Functionality*, offering a palette of *Colours* carefully selected and appealing at an appropriate *Price*. Figure 5.18 below illustrates GIORDANO's image, extracted from the company's website.

Figure 5.18 – GIORDANO Promotional Campaign Image

It is important to remind the reader that the examples given do not intend to judge the current products the company offer to the market, but promote a better understanding of the broader application of the *Fashion Polyhedron*, illustrating the application with existing brands.

The suitability of the *Fashion Polyhedron* model is not only finding out current needs of the consumers, but also supporting consumer research and forecasting. The completed polyhedron can also assist consumer satisfaction evaluations and comparative analysis between groups of consumers. Some possibilities for comparison could be made between young consumers from the United Kingdom, Brazil and China. Certainly, the Polyhedrons for TOPSHOP, M.OFFICER and GIORDANO demonstrate clear differences and similarities between consumer needs, expectations and preferences of the national groups.

5.5   SUMMARY OF VALUE

This research allowed for the development of analysis in fashion clothing consumer behaviour in the British, Brazilian and Chinese consumer markets.

The methods used enabled the identification of some of the main factors that might influence choice and consideration. The results indicate that, despite the reality of the fashion market, body shape is an important variable in determining product development, and illustrative examples show an *Indicator for Fashion and Clothing Consumption* to express this need.

The coincidental findings between the three targeted national markets seem to be important points for product development in the global market. The distinct results show the importance of improving responsiveness to domestic consumers. The comparative study, including a wide range of consumers, allowed the identification of subtle differences not established in standard market research.

The study with the consumers was based on the analysis of the adaptation of original theories to fashion clothing product consumption. Firstly, a new conceptual framework arose from the consumer investigation and was called the *PIL Model*.

The designers' analysis considered their specific approaches as professionals as well as showing the way designers think about their consumers. Pursuing a logical path to assist designers in understanding consumer expectations, the *Means-End Chain model (ACV)* was suggested.

Companies were also investigated and their choices relating to market, strategy and value were considered. An analysis of the managers' vision of their consumers also took place, confirming the need for a better integration within product development teams in order to promote better satisfaction for consumers.

Two key analytical tools – *PIL* and *ACV* – were blended in order to enhance the relationship between consumers, designers and companies. This innovative interface was conceived based on a polyhedron shape that may help in tasks such as forecasting, product development, product suitability evaluation, product and market comparison, decision-making processes, promotion support, amongst others.

In terms of contribution to knowledge, if compared with referred-to theories and models, the *Fashion Polyhedron* seems to be more complete, tuned and updated to the fashion clothing consumers' reality and to current industry requirements. The wide scope of this research, investigating British, Brazilian and Chinese consumers simultaneously, gives to the proposed model a global legitimacy if compared with other referred-to works. Moreover, the challenge of offering a tool that can satisfy three distinct views of fashion clothing products, by analysing consumers, designers and companies needs, also seems to be innovative.

It is important to highlight that this research pursues a systematic multidisciplinary set of approaches and methods. It is true that some of the results found in this research are congruent with several referred-to works' results, although the model proposed by this research is wider in investigation and fields of application. This research is not a complementary study of issues investigated and developed by other authors, but a sort of synthesis of several methods and distinct views of fashion clothing from different fields of knowledge. More than that, the model proposed by this research summarizes in an integrated way the application of a single model within the context of completely different visions, in order to promote improved practice amongst the stakeholders in the fashion clothing value chain.

Analysis of the interdependence between the distinct areas of knowledge has demonstrated the need for multidisciplinary methods. Taking this into account, the innovative approach of the dependency relationships between stakeholders and a proposed integration between these areas, seems to be unique and not found by the author in existing literature. As the research was tested within three different targets, countries, economies, geographies and cultures, the proposed model has the advantage of being broadly applicable with more accuracy.

The majority of the works referred to in the Literature Review chapter and throughout the study had investigated separately one of the stakeholders (KSA, 1999; Zhang, 2002; Iltanen, 2003; Li, 2003; KSA, 2004a; KSA, 2004b; Faust et al., 2006; Mintel, 2006b); and a few of them had investigated both of the stakeholders combined (Lamb and Kallal, 1992; Benktzon et al., 2003; Iltanen, 2005; Sinha and Studd, 2005; Mintel, 2006a). However, none of the works had taken into consideration in depth the integrity of the triumvirate, consumer-design-company. For this reason, the results offered by the referred-to works often have a very limited application. On the other hand, due to the constitutive elements of this research, and the interconnected vision of the decision-making process for developing fashion clothing products, the results from this research seem to be more realistic.

In order to review some of the connections between this study and the referred-to works, firstly it is important to make a clear distinction with them. Generally, there are two very distinct approaches in these works: some of them adopted qualitative methods and small sample sizes, presented in the Table 5.21 below, and others followed quantitative methods and large sample sizes, as Table 5.22 shows.

Another interesting point relates to the field of knowledge the studies investigated. The majority of qualitative works pertain to the design area whereas the methods adopted were mainly practice-based research, grounded theory and case studies (Table 5.21). Moreover, none of the studies relating to the field of design have ever investigated an emergent society. On the other hand, the majority of quantitative works are dominated by the marketing field, with abundant use of questionnaires and statistics (Table 5.22) and among the investigation of several mature societies, just two works with one emergent society: China (Zhang, 2002; KSA, 2004b).

Table 5.21 – Selected Qualitative Referred-to Works Summary and Elements Considered during the Discussion of the Originality and Uniqueness of this Research

AUTHOR	FIELD	GEOGRAPHY	METHODS	AUDIENCE	SAMPLE SIZE	TARGET	SCOPE	CONTRIBUTION	ANALOGY	DISSIMILARITY
Lamb and Kallal (1992)	Design	USA	Practice Based	Academic	Not known, not indicated	Consumer & Designer	Consumers with special needs also desire cool garments. Three projects were developed: figure skating costume, room cleaner uniform, clothes for a client with spina bifida.	The FEA consumer needs model: Functional, Expressive and Aesthetic frameworks for apparel design education.	The study of consumer needs elements to supply designers' guidance.	The FEA model does not include any physical element from the consumer.
Benktzon et al. (2003)	Design	Sweden	Practice Based	Academic	50 csmr, 15 grmt	Consumer & Designer	Female consumers with osteoporosis or normal body changes due to aging.	A book (Klädd) with several patterns and descriptions about awareness for Fit and Comfort within garment design.	The approach for inclusion a group of consumers often neglected by the industry.	The insights considered the physical elements as the main key for fashion clothing satisfaction for the target group.
Iltanen (2003)	Design	Finland	Grounded Theory	Academic	44 dsgn	Designer	Fashion designers' views and attitudes towards older female consumers.	Age and lifestyle are important variables to consider, although aging implies in body changes.	Designers prefer to work with younger, active, trendy and slimmer consumers.	The insights about the consumers needs were inferred based only on designers' comments.
Li (2003)	Design	UK	Secondary Data	Academic	not known	Consumer	Functional sportswear garments for female grey market. Height, skin, temperature and fat distribution were analysed.	Body shape is determined by genetic factors, diet, lifestyle, level of fitness and age.	Garments should have quality, comfort, function and aesthetic elements.	There was no reference to any existent contact between consumers and designers during the study.

Iltanen (2005)	Design	Finland	Grounded Theory	Academic	12 csmr, 8 dsgn	Consumer &	How fashion designers and consumers construct an image of the end-user - older female consumers.	Designers have stereotypical and preconceived ideas about older consumers' taste. Consumers are able to notice this.	Design education should take into account widely functionality, aesthetics and expressivity.	Physical variations were not emphasised within the target consumer group.
Sinha and Studd (2005)	Design	UK	Case Studies	Academic	3 dsgn, 8 cmpn	Designer & Company	A comparative study of the design process for fashion and textile product development.	The role of the designers moves from a researcher-analyst to a strategist. These activities imply strategic management as part of their education and training.	Fashion design process should start from and end to the needs and expectations of the consumers.	The companies' strategies were not deeply investigated as part of this study.
Faust et al. (2006)	Management	Canada	Exploratory	Academic	5 cmpn, 5 grmt tested	Company	A comparative study about size variation within companies. The inaccuracy of the women garments in the market.	There is a lack of sizing standardisation linked to the design activity. Companies should take consumers' needs more seriously.	Consumers encountered several problems with sizing and body shape when searching for fashion products.	The study was developed based only on the US size 6 (UK size 10), possibly minimising crucial problems with pattern gradation rules.

Note: csmr – consumer; grmt – garment; dsgn – designer; cmpn – company

An issue worthy of discussion in relation to the referred-to works selected for summary in Tables 5.21 and 5.22, is the audience of the study. All the qualitative works were generated from within universities and have an academic audience. On the other hand, only one of the studies which adopted sophisticated statistical methods was generated inside the academic environment (Zhang, 2002), whereas all the others were conceived by consultancy agencies envisaging commercial usage (KSA, Mintel). Possibly, this is an indication of the welcoming attitude from companies currently in the competitive marketplace towards results acquired using quantitative methods.

Table 5.22 – Selected Quantitative Referred-to Works Summary and Elements Considered during the Discussion of the Originality and Uniqueness of this Research

AUTHOR	FIELD	GEOGRAPHY	METHODS	AUDIENCE	SAMPLE SIZE	TARGET	SCOPE	CONTRIBUTION	ANALOGY	DISSIMILARITY
KSA (1999)	Marketing	Europe	Questionnaire, Statistics	Commercial	2,500 csmr	Consumer	Male and female consumers from Germany, UK, France and Italy, older than 21 years old, 70% of top household income	Fashion companies are not responding efficiently to consumer expectations. Companies should adopt a consumer-driven attitude and strategy.	Successful business will need new forms of consumer intelligence.	The insights are not specific for the fashion clothing industry, but for several consumer goods industries. Restrictive application only for affluent group of consumers.
Zhang (2002)	Marketing	China	Questionnaire, Statistics	Academic	3,500 csmr	Consumer	Male and female consumers from 6 cities of China. Gender, income, age, education, occupation and marital status were investigated.	15 attributes for casualwear garments, whereas the most important were Fit, Comfort and Style, in contrast to Fibre Content, Warmness and Fabric Thickness as the least.	The insights considered four key factors for product attributes: Function, Appearance, Symbolism and Price.	Body shape was not considered as a key variable in the study of the preferential differences with consumers.
KSA (2004a)	Marketing	USA	E-Panel, Statistics	Commercial	1,500 csmr	Consumer	Male and female consumers, older than 21 years old, boosting annual household income higher than US$100k.	The introduction of the Mindshare concept as "consumer awareness of a product or brand as opposed to market share".	As the 21st century consumer faces a large number of choices, companies should be sensitive to capture consumer mindshare and offer better solutions for specific needs.	The study was directed at the retail sector and there is no evidence about the investigation of the design activity within this new consumer-company approach.
KSA (2004b)	Marketing	China	Questionnaires, Statistics	Commercial	600 csmr	Consumer	Male and female consumers from all ages, residents in four different cities and middle-class.	Chinese consumers, although considered as emergent consumer for brand goods, know exactly what they want. Only 13% of the sample declared that they bought another colour/size/style when their choice was unavailable.	A new way for monitoring consumers should be implemented, providing deep insights into demographic, social and cultural factors as well as behaviour and beliefs.	The study was not specifically designed for the fashion clothing industry, and the consumer target investigated was the emergent 'brand hunter' upper middle-class.

340

Mintel (2006a)	Marketing	UK	Questionnaires, Statistics	Commercial	2,045 csmr, 31 cmpn	Consumer & Company	Male and female consumers older than 15 years old. Analysis of their, life stage, ACORN home area and Body Mass Index.	A comparative study about the shopping experience of size 10 and size 18 for male and female consumers.	Non-standard sized consumers have a huge desire to be able to enjoy fashion and to dress well in the same way as those who fit within standard measures.	The study restricted interviews to consumers and companies, and did not investigate the designers' views on the issues.
Mintel (2006b)	Marketing	UK	Questionnaire, Statistics	Commercial	2,626 csmr	Consumer	Male and female consumers older than 15 years old combined with secondary data from national statistics and others.	Examination of the consumer attitudes and behaviour towards shopping, with the ultimate goal of assessing whether consumers make their purchasing decisions on a rational or emotional basis.	Retailers should offer premium products. The focus needs to be moved from price to product, shop environment and services. Companies should identify their consumers better, as the same individual can change the mind, depending on occasion or mood.	The study was not specifically designed for the fashion clothing shopping experience, but for several consumer goods retail stores.

Note: csmr – consumer; grmt – garment; dsgn – designer; cmpn – company

The intention of discussing and quoting referred-to works was not merely comparative, but essentially constructivist, as it is necessary to respect the differences of the parameters used in each study. In the same sense, there are some approaches used by the referred authors which were not compatible with any kind of comparison to this research, although their conclusions were worth bringing into the discussion (Faust et al, 2006).

The geography of the target for this research – three countries in three different continents with three different cultures and economies (UK, Brazil and China) – is also an important point to highlight as the only true comparison within different cultures and economies among the referred-to works took place within occidental European countries (KSA, 1999).

Finally, it is worth highlighting that a study, which used both qualitative and quantitative methods, attempts to be appropriate for both audiences: academia and industry. Even when at some stages of this study, consumers, designers or companies were investigated independently, the interconnection between the stakeholders was never neglected, as well as their internal and external influences.

CHAPTER 6 - CONCLUSIONS AND IMPLICATIONS

The fashion clothing industry could make use of a new supportive device for product development as introduced in the last chapter. Before the final conclusions and implications are presented to the reader, the first section of this chapter will summarise the study undertaken.

Based on the survey results, a set of theoretical concepts have been used as a framework to organise the conclusions and recommendations. The aim of the study, as stated in Chapter 1, Section 1.3.1, was to identify if fashion product development strategies for globalised environments could become more effective through understanding consumer needs, motives, and pleasures. The conceptual approach of this research considered the fashion clothing industry as a single entity, as consumers do not differentiate between these separate industry concepts.

Key theories were discussed and some relevant ones selected to be used for analysis and the discussion of findings. The theories came from different fields of knowledge in an attempt to get a holistic perspective of fashion clothing product development. The relationships between fashion and culture, communication and consumption were presented, especially their relevance from the consumer viewpoint. The theoretical framework mainly connected with designers' practices was discussed relating to clothing, design and art fields. Marketing, business and manufacturing theories were shown mainly in connection with companies' interests.

Cultural and social variables were taken into account, especially with the comparison between Western and Eastern consumption and consumer profiles; global influence was considered as were local characteristics where appropriate. Market conditions, national economies and potential growth for the fashion clothing industry were analysed in both mature and emerging consumer bases. The research used three case study groups: British, Brazilian and Chinese markets.

Inside these three countries, questionnaires were completed by consumers, and interviews were conducted with designers and managers.

Consumers are constantly making assessments about fashion products and the messages they convey about identity and self-image. The choices consumers make help to inform other people of their values by association with products and services. As contemporary life styles become more complicated, and life situations change on a continuous basis, habits also adapt and change according to experiences.

In the post-modern society, the ageing consumers do not seem to lose their youthful attitudes, but their social values change towards using and wearing fashion products. The generation of consumers who had a close relationship with fashion when younger, seem to want to remain fashionable.

Currently, society is dramatically dynamic, and changes with a speed not controlled by companies and designers. Everyday new consumers emerge and their expectations and needs vary. A creative procedure should be adopted taking into account, as much as is possible, the indicators discussed in this work.

All of these conditions provide important insights into new patterns of consumer demand for fashion companies to respond to. Being able to identify and communicate product benefits offers new challenges to the industry. Consumers are more discerning about product attributes and respond to marketing that reflects, rather than compromises, their key values.

Extensive research has been undertaken by others exploring ergonomic considerations for developing clothing products for a greater diversity of consumers, adding body shapes into the equation of socio-cultural and individual dimensions. Although there is still a lack of research combining ergonomics, clothing and fashion, this issue is one that this research has attempted to cover.

Limited research has been undertaken to compare factors that affect consumers before the product is designed. This research goes some way to addressing some of these issues and begins the process of identifying key factors that need to be considered, especially by fashion designers, but this should also benefit retailers', companies' and marketers' strategies and plans.

An analysis of consumer recognition in fashion clothing products was developed, not considering products that are already on the market, but mapping some reasons for design customisation or a more complex briefing agenda. This assumption offers significant potential for creating new materials and shapes, based on the tangible and intangible needs of consumers.

A survey was conducted in the UK, Brazil and China, with consumers being asked about the degree of importance of fashion clothing product attributes. This approach was selected to consider the distinctions between a mature market, and emerging Western and Eastern markets. A random survey of 264 consumers from the Southeast of England took place in May and June 2004, 320 questionnaires were completed in the Northeast of Brazil during August and September 2004 and 227 Chinese consumers were involved in this field research during November and December 2004.

343

Currently, designers are working within a competitive fashion industry in different or blended markets: mature or emergent, local or global, Western or Eastern. Both quantitative and qualitative analyses were used as a method of inquiry to investigate the designers' educational background and skills as well as their company's position, target groups and anticipated developments.

The challenge for designers is to capture consumer feelings and emotions throughout their product creations and to ensure a continuous interaction between consumers and products. Thinking about clothing, customisation does not only fit better, but also allows the consumer to have a sense of ownership, pride, an individualistic touch and to choose things based on emotional value.

A survey, based on interviews, was undertaken with fashion designers. A total of 20 interviews took place: six interviews were completed in the UK in June and July 2005, nine in Brazil from July to September 2005 and five in China in November 2005. For the Chinese sample, the researcher conducted all of the interviews with translation support. Fashion designers were invited to participate in the research based on their interest, diversity of work and availability. Within each national sample, it was seen as important to include well-known fashion designers, brand-diffusion fashion designers, and emerging new generation of fashion designers.

Companies are investing in personalisation and mass customisation resulting in improved interfaces between consumers and products/services. Especially in the fashion industry, where the lifecycle of a product is so short, market requirements need to be directly linked into the working process of design teams. By the same token, because of the dynamic nature of the fashion process, decisions need to be made at management level.

A survey of 20 fashion companies was held in the UK (6), Brazil (9) and China (5) based on interviews. Similar criteria to that adopted for involving the designers was utilised for the companies. Size, market strategy, strategic group, and product value parameters were used to support the initial selection of companies. When it was possible, the CEO was the interviewee, although in some cases the interview was carried out with a middle manager.

A database framework was created using the original data collected from consumers, designers and companies and placed into SPSS software. Although 800 consumers, 20 designers, and 20 companies constitute a valuable investigation, it is still a small sample in relation to the number of consumers in the world. The considerable difference between the quantity of respondents within the consumer survey in relation to the designer and company segments possibly suggests greater accuracy of the consumer results. Even so, this ratio represents, with some reliability, the real scenario within the fashion industry.

344

As only three countries have been used in the study, this does not constitute a global study, but goes some way to inform and direct fashion companies and designers to change attitudes. Limiting the sample in this way offered control, but also limited potential application of results. These demographic groups are, however, meaningful in investigating global trends including mature and emergent markets from Western and Eastern cultures. There is the opportunity for further research in other areas of design management activity in the fashion industry.

The data gathered in the UK, Brazil and China was treated and analysed by both qualitative and quantitative methods as well as using a combination of both. Content analysis was used to investigate open questions from consumers' questionnaires and information gathered from interviews with designers and managers.

Quantitative analysis supported the stakeholder comparison in order to feed evidence for the recommendations. Inferential statistical methods gave support to the treatment and processing of the variables, enabling the investigation of crossed relationships.

The *PIL* Model, a business conceptual tool, was defined to provide better-targeted fashion clothing consumption preferences. The *Indicators for Fashion and Clothing Consumption* were split into the three core variables of the model: *Physical*, *Identity* and *Lifestyle* (*PIL*).

The *Means-End Chain Model (ACV)* comprising attributes, consequences and values was adapted and used for the analysis. Content analysis was used to design the hierarchical value map for fashion clothing consumption. A Likert type scale measured the degree of importance that consumers, designers and companies gave to the *Indicators for Fashion Clothing Consumption*.

The idea of analysing a fashion product based on attributes, consequences and values may not only be innovative, but also gives the opportunity for all stakeholders to be able to anticipate which garments should become an object of desire and why.

The *Means-End Chain Model (ACV)* was created, basically, for consumer marketing analysis. However, this study also shows the benefits of this method for achieving improved product development evaluation. The model attempted to create a link between perceived product attributes and values. The use of indicators from qualitative research with categories can help in the accounting process for quantitative data within everyday decision-making practices.

The *PIL/ACV* joined model in a polyhedron format reduced the complexity of the set of parameters involved in a product development within the fashion industry. Fictitious examples using real brands have illustrated the application of the *Fashion Polyhedron* within the product development processes for designers and the decision-making processes for companies.

In order to organise the final research outcomes, the chapter is divided into two main sections: the first reports the main conclusions of the research (6.1) and the second discusses some implications this research could have for society as well as the researcher's reflections about the investigation, the process itself, and future possibilities (Section 6.2).

6.1   CONCLUSIONS

The conclusions have been organised under three headings for ease of analysis, and a set of implications have been developed that could be addressed by businesses, organisations, government support agencies, educationalists, and fashion companies. The survey data came from three different continents, thereby providing rich perspectives on global consumption. Companies, who own domestic market share and want to enter new global markets, could use this data to improve their product design and development decisions.

The conclusion for consumers is presented immediately below (Section 6.1.1), followed by the conclusion for designers (Section 6.1.2). The conclusions for companies are presented in the last subsection of this part of the chapter (section 6.1.3).

6.1.1 Conclusions for Consumers

The research findings indicate that consumers are generally not satisfied with fashion clothing products currently on the market.

The most significant research findings into the nature of consumer preferences indicate that beauty is more important for Brazilians than for British and Chinese Consumers. In addition, *Attributes* are more important for Brazilians than for the other two countries. *Consequences* are more important for Chinese, in particular, *Health, Fashion* and *Exclusivity*. *Values* are more important for British consumers, in particular *Gender* and *Body Exposure*.

The most significant research findings regarding the East/West cultural types indicate that there are some differences that affect consumption. The research revealed that while British consumers are more likely to choose fashion clothing products that satisfy their self-emotional needs, Brazilian consumers choose products that have higher socio-economic appeal. Chinese consumers on the other hand, are more likely to choose function-emotional messages.

According to KSA European Consumer Outlook, consumers in mature markets know what they want, and are critical, knowledgeable, value-driven and practical thinkers (KSA, 1999). Consumers from emerging markets are learning these lessons very quickly.

A point worth stressing in relation to the body of consumers is that when crossing relationships between *Indicators*, *Needs*, *Motives* or *Pleasures*, a significant relationship was always found with a physical variable from the consumer profile. Body shape and its consequences are definitely important for the better development of fashion clothing products.

Coincidently, a recent report from Mintel (May, 2006) highlighted the importance of sizes and fit in the British fashion market. Mintel stated that for the first time they investigated the nature of the consumer in terms of their body dimensions and shape and the differences of attitudes and shopping experiences for a size 18 woman from a woman who is a size 10.

Mintel's awareness of this issue reaffirms the importance of the aspects discussed in this research. One of the conclusions of the Mintel report (2006a, p.6) is:

> There is a huge desire among non-standard sized consumers to be able to enjoy fashion and to dress well in the same way as those who fit within standard measures. Allowing them to do this, while making the right adjustments in terms of styling and technical specifications required by plus-sized, tall or petite customers, is the skill required of retailers and brands if they are to be successful in satisfying these niche consumers.

The research undertaken by Mintel (2006a) also indicated that older, heavier and taller consumers are more numerous, and that men are becoming heavier more quickly than women, although the latter have been encountering the greatest fit and sizing problems. The report also commented on the fact that retailers or brands that offer a separate range for larger-sized customers make the customers feel different from the mainstream-sized shopper and a 'second-class citizen' in terms of fashionability or choice, and thus the ranges are likely to fail. Although this report is an important signal of the recent growth in awareness regarding sizing in the UK fashion industry, Mintel's search restricted interviews to consumers and companies, and did not include designers in the equation. This fact evidenced a lack of a holistic approach for the research and improvement of the industry.

In addition, the SizeUK survey (2002), an electronic three-dimensional body scanner that surveyed measurements of 11,000 men and women from across the UK between July 2001 and February 2002, found that 38% of the women and 44% of the men in the sample were either overweight or obese. Obesity is currently considered to be a British 'epidemic', but this tendency is no different from other countries and is a result of modern eating and lifestyle characteristics.

Consumer variables such as *Gender*, *Age* and *Body*, among others have been investigated through the three nationalities. *Gender* is an important consideration as it can indicate new market opportunities for womenswear or menswear; ultimately, fashion clothing products designed by gender have different requirements. *Age* has been used as a consumer variable as consumers seem not to want to be targeted according to their age; they want to buy fashion products according to their lifestyles. *Body Mass* is an important consumer variable for fashion designers as the sensory nature of clothing is critical to the way humans relate to fabrics and comfort.

The *Means-End Chain* analyses show that there is a misalignment and mismatch between consumers and companies/designers. Figures 4.45, 4.46 and 4.47 in Chapter 4 provided visual evidence of the differences in interest between the three parties involved in the research study. Corroborating with these outcomes, the next section introduces some discussion relating specifically to the designers' findings.

6.1.2 *Conclusions for Designers*

The research findings of designers' abilities to influence decision-making processes indicate that they are not using market intelligence to inform the design development stage, but are using their personal subjectivity to inform their design ideas. The findings indicate weaknesses in fashion designers' knowledge, skills and competences to manage the core design processes for contemporary collections in order to meet the needs of cultural diversity and consumer demands.

The content analysis of the designer interviews (Figure 4.52), clearly illustrates the designers' weakness and, in particular, the starting point demonstrates a lack of market/consumer information as a basis for design development. The outcomes indicate that fashion designers are not using adequate consumer needs briefing material to improve product development. The reason for this varies from brand-diffusion designers whose briefings are supplied by marketing departments, to designer-name brands where the conceptual ideas of the designer-chief are the core of the briefing.

In terms of design education, the findings provide insights into some of the issues that need to be considered for designing new course structures, developing new course content, improving staff development and introducing education/industry initiatives that should improve the current environment.

The data illustrates that fashion designers do not, at present, have the tools to help them research and analyse their consumers effectively to ensure their product offerings take into account their physical and cultural differences. Designers' current product development approaches are heavily reliant on their personal and subjective knowledge of consumers and are not based on sophisticated methods of investigating new target markets.

It seems to be urgent to supply designers with a method that can allow them to free their creativity, but at the same time to remember the consumer needs and the company requirements. The simplicity of the *Fashion Polyhedron* can fill this gap within designer's practices, giving support for at least six key *Indicators* inside any product development process. The way the *Indicators* should be selected by the designers and placed as part of *PIL* and *ACV* dimensions, if appropriate to the designer company position, can be from the subjective to the rational, from brainstorming *Indicators* as trends, to linking creative stories amongst them. On the other hand, even if the company prefers to use qualitative or quantitative methods out of the scope of the designer, and give the *Indicators* already chosen to the designer, his/her creativity can still flow, as shapes, materials, colours and messages will continue to be the designer's concept decision-making elements.

6.1.3 Conclusions for Companies

The evidence suggests that consumers are not satisfied with the performance of fashion companies. Companies need to lose preconceived ideas about niche markets and add value via fashion products that transcend all ages, body shapes, and ethnicity amongst other variables. Evidence suggests that the fashion industry needs to be more aware of indicators when targeting consumers.

The traditional approach to developing and offering products is based upon the capability of companies to produce and offer something based on their past record of success, or their production capacity. In this respect, the marketing function is there to stimulate the consumption of goods or a service.

The increasing power of the consumer in contemporary marketplace dynamics, and the pace of change enabled by faster and more effective communication and information technologies, requires companies to adopt new approaches. The day of the naïve consumer has effectively ended, especially in mature markets, and respect for their rights and priorities has become a must for companies searching for a successful approach.

Companies need to remove their stereotypical ideas of overweight consumers, and respect cultures and aesthetic differences, creating fashion clothing products that transcend all races. Companies need to expand their understanding of distinct ways of living. This approach should make the relationship between companies and consumers more human led and should help to provide a tool for effective and more focused decision-making techniques for developing better fashion clothing products.

Fashion companies are also not responding efficiently to consumer expectations (KSA 1999; 2004a). Fashion companies are more focused on brand ideology as the way to build a relationship with consumers rather than investing in real product benefits. Although, for companies, *Quality* is one of the most important indicators, this has not shown to be as high ranking for consumers. A similar result is observed with the indicator *Brand* within the British companies. It seems that companies are putting their energy into indicators that are not the most significant for consumers.

The blend of *PIL* and *ACV* elements (forming the *Fashion Polyhedron*) showed that the relationship between consumers, designers and companies' interest could be noticeably enhanced. Companies can choose which path they should adopt to include the *Fashion Polyhedron* as a tool for decision-making process in product development: (a) keep the selection of the six key Indicators with the designer and his team of consumer research and trends; (b) contact the marketing and sales team to communicate with the design team, possibly promoting focus group or small size client surveys, or (c) ask for support from one of the existing marketing consultancy agencies with statistical consumer intelligence about new markets. This model as a research outcome has several benefits for the state of the art fashion clothing industry. These implications are presented in the next section, divided into distinct approaches: theory (6.2.1), practice (6.2.2), policy (6.2.3), education (6.2.4) and further research (6.2.5).

6.2 IMPLICATIONS

This section addresses some points which have arisen from the research investigation that can contribute to the improvement of society. The recommendations are stated in five distinct sections: theory, practice, policy, education and further research.

6.2.1 Implications for Theory

The conception of the *PIL* model (*Physical, Identity* and *Lifestyle*) has provided a holistic set of dimensions that need to be considered when designing a stylish product. It attempts to provide insights into consumer preferences and helps cross-functional teams to better analyse their choices.

The model has been developed to take into account the primary importance of *Physical* attributes that affect the body. The role of ergonomics and body shape needs to be considered to ensure that garments have appropriate fit and features to improve product quality. The second dimension of the *PIL* model is *Identity*. The identity variables have been selected because clothing products demand high fashionability and style. The third dimension of the *PIL* model is the *Lifestyle* aspirations of consumers. The lifestyle variable relates to the social environment that affects consumers, in particular body/mind relationships.

The analysis of the *Means-End Chain (ACV)* shows the feasibility of identifying the paths that consumers choose. The analysis shows also the applicability of this theory to product development teams. The *Attributes* support the designer in remembering what is necessary to consider in a project to turn it in a product. The *Consequences* help the designers to express the benefits that consumers will have when experiencing their product. The *Values* remind designers about the intangible elements the product is expected to have embodied.

PIL and *ACV* allow briefing before the product design process and do not influence concept and creativity with pre-conceived ideas, giving the designer freedom to use his/her artistic side as well.

It is important to stress that even though this research was based on fashion clothing product development, a wider area can benefit from the outcomes. The process of producing a brief for a product before the design stage is an everyday task for all design fields and the polyhedron can fit into numerous distinct design areas. The applicability of the model should become more precise with the investigation of the specific indicators for consumption in each industrial sector, and the subsequent adaptation of the polyhedron.

Lastly, the *Fashion Polyhedron* offers a singular device that blends the interests of three crucial stakeholders for the fashion clothing industry in language that can be understood by all agents involved. The intrinsic logic of the model takes into account the humanities, the creativity and the management fields, considering the dynamic nature of societies. This feature, that offers the industry the flexibility needed to work out into the real market, is better discussed in the implications for practice subsection.

6.2.2 Implications for Practice

The implications the *Fashion Polyhedron* can have for practice are numerous and depend on the creativity and objectives of the user. The applicability is wider, and the results can support the enhancement of quality of life. The approaches can be related to *Physical* characteristics, *Identity* or *Lifestyle*, as well as focusing on the *Attributes* of the products, the benefits (*Consequences*) they can give to the user and the *Values* the user can obtain from them.

Better consumer education could be introduced and included in product packaging. Jacobs and Stockert (2004) criticised the fashion consumers' ignorance when cutting itchy labels from garments. By using new symbols and logos to communicate additional product information this could ensure better fit-for-purpose benefits. Maintenance instructions such as 'dry clean only' in ordinary garments are an aberration that just stresses the lack of commitment a company has to consumers' real life, and are only there to safeguard companies' interests.

Comparing the applicability of the model for fashion clothing products with other industries, the food industry for instance has adopted comprehensive product information on its packaging, such as health/wellbeing and fair trade advice which could be emulated by fashion clothing products. An other example is the footwear industry, which is now considering its responsibility for the posture of the user, their way of walking and back problems. Some companies are alerting consumers to the physical strains of high heels and pointed toes, giving the consumer a better conscious choice. An example of the appropriateness of this approach to the fashion clothing industry can be related to the recent fashion trend for low-waisted trousers and skirts which have led to deformation of the user's body, and yet no alert was considered by the industry.

Companies that decide to have an open attitude towards their consumers have more opportunities to succeed. Consumers are more knowledgeable, and the growing concern with fair trade and green issues is very relevant. When issues that were 'behind the label' appear on the market, it is seen as a threat to the reputation of brand reliability. Designers and companies should be sincere with their consumers and explain exactly at whom their products are aimed. Moreover, branding cannot be an independent activity and could be more successful if consumer needs are considered.

Recently, in a European Design conference[31], Lars Engman, the Design Manager of IKEA, the world's largest furniture company, explained that his company's strategy includes Maslow's Needs analysis within the range of products. As could be seen, applications of methods similar to that developed in this research are much more diverse and can be adopted by other fields of design and commerce.

The research findings could be presented in a visual manner to help designers use the *Indicators* in their design practices. The image bank (Table 3.1) provides an example that could be developed further, according to the culture and target market. The images are metaphors for the 38 *Indicators for Fashion and Clothing Consumption*, and are fashion-free visuals to enable minimum influence on their design concepts. Designers and companies can create their own bank image, according to their targets, trends or seasons. As a consequence, the communication within the teams will become clearer.

Considering the tendency towards a global fashion industry, some adjustment should be made to better integrate Northern and Southern hemispheres. The dissemination of catwalk shows named by seasons (spring/summer and fall/winter) in fashion weeks around the globe provokes a fuzzy understanding for the consumer due to the simultaneously different seasons depending on the geographic position of the consumer. Although some companies have been adjusting orders due to the local market, the current nomenclature of the collections embodies a lack of global concern and inclusivity.

The adoption of the *Fashion Polyhedron* to guide and give support to fashion clothing product development can help the companies' activities relating to global exchanges. At the same time the model can guide designers with local and individual differences in consumer product needs and expectations. Moreover, the use of the device can enhance the performance of the companies regardless of their size as the model is based mainly on consumer data collection. As a result, policies can be implemented in order to develop regions or societies as suggested in the next subsection.

6.2.3 *Implications for Government Policy*

The key implication for government policy is the strengthening of business support mechanisms for SMEs. The governments need to play a role in promoting inclusivity for disadvantaged consumer groups. The findings could have implications for start-up companies, and improve their chances of sustainability through understanding their consumers' expectations in more detail.

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[31] ETHICS: Design, Ethics and Humanism Conference, organised by Cumulus, the European Association of Universities and Colleges of Art, Design and Media, in association with L'Ecole de Design Nantes Atlantique, France, 16th June 2006.

The fashion industry should be treated more seriously, with both policies and more investment that recognise its important contribution to the enhancement of quality of life. Although, according to Jacobs and Stockert (2004):

> It certainly is not true that the fashion industry is not dependent on the latest basis scientific insights in biology or nanotechnology, as for example the pharmaceutical or the microchips industries, fashion and other creative industries are science-based from a totally different perspective. Only to mention a few aspects: they have to understand customers and social trends, to think about creative innovations, to know about the organisation of international supply chains and about ethical issues related to globalisation. (footnote, p.14)

The fashion industry should be better funded and supported, not only due to price policy, constant market activity or jobs on offer. Through this research it was possible to map the place and influence that this subject has in society and the economy. Although fashion clothing is not as 'essential' for survival as are the food and health industries, its products are everywhere and in every moment of contemporary human life.

A set of guidelines would be useful for policy makers as well as access to inclusivity information. Incubation, the setting up of business by new generation designers, cooperation and networking inside the whole value chain are key areas to be improved and enhanced. Issues such as ethics, fairness and social responsibility are issues that should also be considered further.

Another crucial point relating to fashion inclusivity is the fact that the demographics and anthropometrics changes in society are dynamic and need to be monitored. Very often part of the market is treated as niche although they are a majority. The spread of obesity in Europe is a clear illustration of the problem: fashion companies insist on producing and promoting clothes for slimmer consumers, although 35% of the European female market dresses size 16 or over. As mentioned previously, a similar prevalence is present in the fashion companies' preferences to target younger consumers despite the potential aging population increase. These considerations are better explored in the next section where changes in education are suggested.

6.2.4 *Implications for Education*

The findings of this research indicate weaknesses in fashion designers' knowledge, skills and competences to manage the core design processes for contemporary collections that meet the needs of a culturally diverse consumer group.

The data illustrates that fashion designers do not have the tools to help them research and analyse their consumers effectively to ensure their product offerings take into account the physical and cultural differences of the consumers. Designers' current product development approaches are heavily reliant on their personal and subjective knowledge of consumers, and are rarely based on sophisticated methods of investigating new target markets.

354

The research indicates that educational planners should consider that to be dressed is a need for everybody and a wide range of consumers need to be included. Aspects such as their age, body shape, social class, ethnic background, lifestyle, mental and body characteristics should be incorporated in academic tasks as a matter of routine.

The data highlights the importance of future fashion design education meeting the needs of highly unpredictable and volatile market conditions by incorporating new curriculum content, learning experiences and outcomes associated with four key trends affecting the international fashion industry.

The first area for improvement is for more focused global market and business intelligence to be incorporated into the design development processes, especially at the conceptual development stage. It is critical to include market, product and consumer research to inform design decision-making that correlates to the external commercial environment. This could be in the form of critical analysis and evaluation of changing lifestyle trends that are discussed and presented in specialist apparel and fashion market reports such as Mintel. These reports provide important insights into lifestyle and social and economic trends that affect fashion clothing consumption. In addition, transferable learning outcomes such as systematic research methods should be incorporated into project briefs that link creativity with commercial skills.

The second key area for inclusion is enhancing strategic management of the fashion clothing design processes, especially the tensions that exist between commerce and creativity. The use of company case studies that profile and explore issues of success, failure and emerging problems that affect fashion retailing, manufacturing and design could raise student awareness of the commercial environment. More inclusion of the market and marketing strategies in terms of how companies are positioned, expanding, or downsizing could be the focus of such case studies to build knowledge and understanding of fashion industrial scenarios and develop insights into the risk and financial implications associated with highly competitive environments.

A third area of curriculum that could be strengthened is directly related to concepts of fast fashion. As this becomes a central core competence of the majority of fashion companies, luxury or high street, project briefs should explore the time and speed elements of fashion clothing product development processes. The use of rapid prototyping and fast generation of ideas should be supported by new technologies. This could enhance the student experience of working as part of a creative team, as well as using different types of new specialist and mobile technologies to speed up the time of idea generation and communication.

A fourth area for improvement is the building of new student experiences through the use of e-learning environments. The role of digital communication and information strategies in the fashion clothing product development processes should be a critical learning outcome. This would ensure that fashion designers are made aware of how fashion companies use digital opportunities as a competitive advantage tool to improve levels of consumer satisfaction. This could be in the form of introducing virtual student and staff exchange projects with international fashion schools to reduce cultural and language barriers. These new insights could provide emerging market opportunities based on building international relations with contemporary societies and designers. The use of digital diaries or blogs as a tool of reflection and evaluation, especially in the first year of study, would enable students to develop long-term links with other international fashion schools to share new knowledge through informal and formal channels. New units of study could be incorporated into undergraduate courses in the form of virtual fashion lounge units helping the fashion community to gain confidence in being connected through digital technology in a global environment. In addition, the inclusion of briefing through new mobile technologies and podcasting should be an attractive way to keep student designers connected with the 'must do' practices commonly used by fashion PR companies in their marketing and promotion efforts.

Moreover, it is important to highlight that this research gives insights into the enhancement of the industry and quality of life for consumers, based on the data gathered specifically for academic research purposes. The methods and applications can be developed and tested through different environments, as well as being a starting point for further research. This subject is better discussed in the next section.

6.2.5 *Implications for Further Research*

The researcher intends to return to Brazil and apply the knowledge, experiences and competences to educational and commercial fields. The significance of the study will also provide important information for regionalised textile/clothing planning developments and policy making. The Recife region is undergoing substantial change due to competitive pressures from other emerging fashion centres within Brazil and abroad.

The research sabbatical has allowed the researcher to develop a strong network of contacts that will build new exchanges and co-operation for potential cross-cultural projects. These will provide the region, the university and the industry with new knowledge of critical challenges that they will need to address in the future.

This research attempted to contribute to the development of the fashion clothing industry and although useful in theory, the results on their own are not enough to change reality. As to the nature of the academic environment, these contributions should be tested and applied in different conditions. At the same time, some of the issues posed in this study could not be investigated in-depth due to time and space constraints or distance from the main objectives of the research. Considering this, some suggestions for continuity and enlargement of the knowledge are as follows:

It would be useful to continue with consumer behaviour studies, especially in new countries, such as India, Russia and the Middle East. The findings could be presented at specialist Textile/Fashion Conferences that would allow dissemination of the work to date, and raise the profile of the researcher. Further analysis needs to be undertaken into pleasure, emotional and motivation theories. Also, the 38 *Indicators for Fashion and Clothing Consumption* could be explored in more depth and detail to identify more accurately variations in consumer behaviour.

Due to the dynamic nature of the society, the current 38 *Indicators for Fashion and Clothing Consumption* are susceptible to adaptation, amendments, additions and reductions according to the market targeted. Monitoring the longevity of each of these Indicators is a hard and valuable task for future studies.

The *Fashion Polyhedron* as a blend of *PIL* and *ACV* models is a proposition to be tested in several types of distinct fashion clothing companies. Only with these experiments can the model be measured in detail for its range and limitations. Thus, the *Fashion Polyhedron*, is a starting-point for a paradigm change within the fashion clothing industry, as its application can assure higher quality in the subjective aspects companies need to consider in a decision-making process.

It is desirable that a large number of designers and companies test the model, specifically developed for fashion clothing product development, as a fundamental stage in the enhancement of it. Only if its evaluation shows its advantages and after the necessary amendments, then the model should be disseminated on a large scale.

The five fictitious examples given, although using real data, are not significant enough to show the applicability of the model. It is necessary to have the *Fashion Polyhedron* adopted by designers and companies of all sizes and markets, as well as monitoring the sales figures and the level of consumer satisfaction of these products in relation to previous and future collections.

Moreover, it would be very interesting to investigate the adequacy of the polyhedron in other fields of design such as furniture, jewellery, and interiors. Due to both the similarities in design briefing tasks and the insertion of fashion into several products, possibly the *Physical*, *Identity* and *Lifestyle* dimensions of the model developed may have some communality with other areas of product development. In an effort to make communication between stakeholders easier, perhaps the use of the *Attributes, Consequences* and *Values* approach may be good practice.

It is important to remind the reader that until now there is no existing standard tool for decision-making processes within fashion clothing companies. Considering that the creative sector often uses its know-how, experience, subjectivity and team ability to make decisions, the *Fashion Polyhedron* can be considered as an advanced predictive tool.

As explained before, the application of the *Fashion Polyhedron* as part of everyday designers and companies' practices does not require advanced and sophisticated statistical procedures. The *Indicators* to fulfil the *PIL* and *ACV* dimensions can be easily identified with the use of qualitative methods such as focus groups, or even a brainstorming session among peers. In this case, the *Fashion Polyhedron* assumes a guidance role to demonstrate and always remind professionals of the 'must-have' elements for the products they are conceiving.

On the other hand, if the entire methodology developed for this research is applicable to real life, from big sample sizes to sophisticated statistical inference, the *Fashion Polyhedron* can be considered an effective predictive device for strategy, new markets and products, and for forecasting consumer needs.

Some people judge you according to the make of clothes you wear. If you are happy, confident and comfortable, the price you have paid is irrelevant.

(Consumer comment, Csmr-UK-2004 database)

358

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APPENDIX

A - COUNTRIES OVERVIEW

A1 UK Overview

http://www.statistics.gov.uk/glance/

http://www.statistics.gov.uk/census2001/census2001.asp

http://www.visitbritain.com/VB3-en-gb/default.aspx

https://www.cia.gov/cia/publications/factbook/geos/uk.html

A2 Brazil Overview

http://www.brazil.org.uk/brazilinbrief/bibliography.html

http://www.ibge.gov.br/english/default.php

http://www.ibge.gov.br/english/estatistica/populacao/censo2000/default_populacao.shtm

https://www.cia.gov/cia/publications/factbook/geos/br.html

http://www.braziltourism.org/

A3 China Overview

http://english.people.com.cn/china/home.html

http://www.chinese-embassy.org.uk/eng/

http://www.acca21.org.cn/ca21pa.html

http://www.stats.gov.cn/english/#

https://www.cia.gov/cia/publications/factbook/geos/ch.html

B – COUNTRIES' FASHION INDUSTRY

B1 British Fashion Industry

http://www.londonfashionweek.co.uk/bfc/

http://www.design-council.org.uk

http://www.dti.gov.uk/

B2 Brazilian Fashion Industry

http://www.abit.org.br/english/content/default.asp

http://www.fashionrio.com.br/eng.htm

http://spfw.uol.com.br/index.php?form_action=english_home

http://www.designbrasil.org.br/portal/ingles/index.jhtml

B3 Chinese Fashion Industry

http://www.cnfti.org.cn/

http://en.chinabroadcast.cn/974/2006/03/29/Zt63@68285.htm

http://english.people.com.cn/200603/31/eng20060331_254955.html

C – CONSUMER DATA PROCEDURES

C1 Consumer Report

what	when	how	who	where
CONSUMER RESEARCH United Kingdom	May & June 2004	Specific questionnaire • Section 1 – Consumption indicators • Section 2 – Consumer socio-physic-demographic profile	self-applied 264 consumers random survey	London & Southeast of England
CONSUMER RESEARCH Brazil	Aug & Set 2004	Specific questionnaire • Section 1 – Consumption indicators • Section 2 – Consumer socio-physic-demographic profile	self-applied 320 consumers random survey	Recife & Northeast of Brazil
CONSUMER RESEARCH China	Nov & Dec 2004	Specific questionnaire • Section 1 – Consumption indicators • Section 2 – Consumer socio-physic-demographic profile	self-applied 227 consumers random survey	Mainland China

C2 Consumer Questionnaire

British Consumers

KENT INSTITUTE OF ART & DESIGN   QUESTIONNAIRE

This questionnaire concerns consumer preferences in relation to clothing and fashion. This work is part of a Fashion PhD student's research at UcCA Rochester. This research has as a main objective the pinpointing of possibilities of improvement in the development of fashion industry products. It may relate the characteristics of clothes with the concepts of anatomical and behaviour adequacy to the perception of user satisfaction, supplying the clothing industry with recommendations about its capacity for product absorption and potential expansion. Your answers will help the clothing industry to design the products that you need. I hope you can help by indicating your opinion for each question in SECTION A. Some of these questions may seem to be very similar but in fact they are there to provide the necessary academic precision. It will take only a short time to answer it. To validate the research, could you please say more about yourself by marking your profile in SECTION B. I guarantee that all information will be used strictly for academic purposes and I remind you of its anonymous character. Thank you very much for your support.

SECTION A – YOUR THOUGHTS

	PLEASE MARK (() THE OPTION CLOSER TO YOUR THOUGHT ABOUT THE SUBJECT PRESENTED IN EACH SENTENCE.	Totally agree	Partially agree	Partially disagree	Totally disagree
A01	Before I choose clothes, I think about what I want them for				
A02	Clothing/fashion has the function to shock and change minds				
A03	Colour is something very personal in a clothing-choice				
A04	Easy care is an essential element in my clothing choice				
A05	I adopt my professional dressing style even when I'm not working				
A06	I always look for clothing that is hardwearing				
A07	I believe that all clothes I wear make me look more beautiful/handsome				

A08	I cannot explain why I like some particular clothes					
A09	I care more about what I wear in a "mixed sex" environment					
A10	I care more about what I wear in a "single sex" environment (same as me)					
A11	I consider the shape of the clothes when I'm choosing them					
A12	I consider the weather when I'm choosing clothes					
A13	I dress myself because I cannot go out naked					
A14	I hate to find someone dressed the same as me					
A15	I have some preferences about fabrics and fibres					
A16	I look for clothes that suit my body shape					
A17	I love clothes that make me feel good when I am wearing them					
A18	I love to receive compliments about my dress style					
A19	I often look for products that may make me more attractive					
A20	I only buy comfortable clothing					
A21	I only wear high quality clothes					
A22	I prefer clothes that I can combine in a variety of ways					
A23	I think clothing cannot be separated from fashion					
A24	I think some clothes may help or damage my health					
A25	If I like some clothes, nobody can convince me to alter my choice					
A26	In my opinion, brand is more important than product					
A27	My dressing style is unique					
A28	One of the functions of clothing is to hide or show my body					
A29	Price is an important factor when choosing clothes					
A30	Some clothes can make me more elegant and influence my behaviour					
A31	Some clothes make me feel/look younger or older					
A32	Please write a new sentence that is important and in your opinion is missing from above. And judge it!					
A33	Think about your favourite item of clothing. Why is it your favourite?					

(Please see reverse)

SECTION B – YOUR PROFILE

B01	HOME REGION OF ENGLAND:
01 ☐	East Midlands
02 ☐	East of England
03 ☐	London
04 ☐	North East
05 ☐	North West
06 ☐	South East
07 ☐	South West
08 ☐	West Midlands
09 ☐	Yorkshire and the Humber
10 ☐	Other_____

B02	RELIGION:
01 ☐	Buddhist
02 ☐	Christian Orthodox
03 ☐	Christian Protestant
04 ☐	Christian Roman Catholic
05 ☐	Hindu
06 ☐	Jewish
07 ☐	Muslim
08 ☐	Sikh
09 ☐	No Religion
10 ☐	Other _____

B03	ETHNICITY:
01 ☐	African
02 ☐	Arabic
03 ☐	Bangladeshi
04 ☐	Caribbean
05 ☐	Chinese
06 ☐	Indian
07 ☐	Pakistani
08 ☐	White
09 ☐	Other Asian
10 ☐	Other _____

B04	EDUCATION:
01 ☐	Left school without taking any exams
02 ☐	GCSEs (grade D – E)
03 ☐	1 – 4 GCSEs (grade A – C)
04 ☐	5 or more GCSEs (grade A - C)
05 ☐	5 or more O Levels or grade 1 CSEs/School Certificate
06 ☐	NVQ Level 2, Intermediate GNVQ
07 ☐	2+ A Levels, 4+ AS Levels, Higher School Certificate
08 ☐	NVQ Level 3, OND, Advanced GNVQ
09 ☐	NVQ Level 4-5, HNC, HND
10 ☐	First degree (e.g. BA, BSc)
11 ☐	Postgraduate qualification (e.g. MA, PhD, PGCE)
12 ☐	Other_____

B05	ANNUAL HOUSEHOLD INCOME (BENEFITS/WAGES/SALARY):
01 ☐	Up to £5,000 (£96 per week)
02 ☐	£5,000-£9,999 (£96-£192 per week)
03 ☐	£10,000-£14,999
04 ☐	£15,000-£19,999
05 ☐	£20,000-£24,999
06 ☐	£25,000-£29,999
07 ☐	£30,000-£34,999
08 ☐	£35,000-£39,999
09 ☐	£40,000-£44,999
10 ☐	£45,000-£49,999
11 ☐	£50,000-£59,999
12 ☐	£60,000 +

B06	AGE RANGE:
01☐	15-19 Years old
02☐	20-24 Years old
03☐	25-29 Years old
04☐	30-34 Years old
05☐	35-39 Years old
06☐	40-44 Years old
07☐	45-49 Years old
08☐	50-54 Years old
09☐	55-59 Years old
10☐	60-64 Years old
11☐	65 Years old +

B07	OCCUPATION:
01☐	Craftsman/Tradesman
02☐	Education/Medical Services
03☐	Housewife
04☐	Manual/Factory Worker
05☐	Middle Management
06☐	Office/Clerical
07☐	Professional/Senior Management
08☐	Shop worker
09☐	Student
10☐	Retired
11☐	Unemployed

B08	GENDER:
01☐	Female
02☐	Male

B09	HEIGHT:
	_____ ☐ metres
	_____ ☐ feet inches

B10	WEIGHT:
	_____ ☐ kg
	_____ ☐ stone

B11a	WOMAN CLOTHING SIZE FOR TOPS (BUST):
01☐	8 (32" - 81cm - S)
02☐	10 (33.5" - 85cm - S)
03☐	12 (35" - 89cm - M)
04☐	14 (36.5" - 93cm - M)
05☐	16 (38" - 97cm - L)
06☐	18 (40" - 102cm - L)
07☐	20 (42" - 107cm - XL)
08☐	22 (44" - 112cm - XL)
09☐	24 (46" - 117cm - XXL)
10☐	26 (48.5" - 123cm - XXL)
11☐	Other_____

B12b	WOMAN CLOTHING SIZE FOR BOTTOMS (WAIST):
01☐	8 (25" - 64cm - S)
02☐	10 (27" - 69cm - S)
03☐	12 (28.5" - 72cm - M)
04☐	14 (30" - 76cm - M)
05☐	16 (31.5" - 80cm - L)
06☐	18 (34" - 86cm - L)
07☐	20 (36" - 91cm - XL)
08☐	22 (38.5" - 98cm - XL)
09☐	24 (41" - 104cm - XXL)
10☐	26 (43" - 109cm - XXL)
11☐	Other_____

B13c	WOMAN CLOTHING SIZE FOR BOTTOMS (HIPS):
01☐	8 (35" - 89cm - S)
02☐	10 (36.5" - 93cm - S)
03☐	12 (37.5" - 95cm - M)
04☐	14 (39.5" - 100cm - M)
05☐	16 (41" - 104cm - L)
06☐	18 (42.5" - 108cm - L)
07☐	20 (44.5" - 113cm - XL)
08☐	22 (46.5" - 118cm - XL)
09☐	24 (48.5" - 123cm - XXL)
10☐	26 (50" - 127cm - XXL)
11☐	Other_____

B11b	MAN CLOTHING SIZE FOR TOPS (COLLAR/NECK):
01☐	14.5" (37cm - S)
02☐	15" (38cm - S)
03☐	15.5" (39-40cm - M)
04☐	16" (41cm - M)
05☐	16.5" (42cm - L)
06☐	17" (43cm - L)
07☐	17.5" (44cm - XL)
08☐	18" (46cm - XL)
09☐	18.5" (47cm - XXL)
10☐	19" (48cm - XXL)
11☐	Other_____

B12b	MAN CLOTHING SIZE FOR TOPS (CHEST):
01☐	Up to 36" (91cm - S)
02☐	37" (94cm - S)
03☐	38" (97cm - M)
04☐	40" (102cm - M)
05☐	41" (104cm - L)
06☐	43" (109cm - L)
07☐	44" (112cm - XL)
08☐	46" (117cm - XL)
09☐	47" (119cm - XXL)
10☐	49" (125cm - XXL)
11☐	Other_____

B13b	MAN CLOTHING SIZE FOR BOTTOMS (WAIST):
01☐	28" (71cm - S)
02☐	30" (76cm - S)
03☐	32" (81cm - M)
04☐	34" (86cm - M)
05☐	36" (91cm - L)
06☐	38" (97cm - L)
07☐	40" (102cm - XL)
08☐	42" (107cm - XL)
09☐	44" (112cm - XXL)
10☐	46" (117cm - XXL)
11☐	Other_____

Thank you very much!!!

Brazilian Consumers

KENT INSTITUTE OF ART & DESIGN

QUESTIONÁRIO

Este questionário diz respeito a preferências de consumo em moda e vestuário. Este trabalho de pesquisa é parte de uma pesquisa de doutorado em Moda em desenvolvimento no Kent Institute of Art & Design (KIAD), Inglaterra e é apoiado pela Universidade Federal Rural de Pernambuco (UFRPE) e Coordenação de Aperfeiçoamento de Pessoal de Nível Superior (CAPES). O principal objetivo dessa pesquisa é apontar possibilidades de melhoria no desenvolvimento de produtos na indústria da moda. Para isso, se pretende relacionar características das roupas, adequação anatômica e comportamental com a percepção de satisfação do consumidor e fornecer à cadeia produtiva recomendações sobre capacidade de absorção de novos produtos e potencial expansão de mercados. As suas respostas na SEÇÃO A ajudarão a indústria a desenvolver os produtos que você precisa. Algumas das sentenças parecem muito próximas, mas elas são necessárias para uma maior confiabilidade dos dados e você não levará muito tempo para respondê-las. Para a validação da pesquisa é necessário o preenchimento da SEÇÃO B, onde você assinalará o seu perfil. É

A 5

garantido o compromisso que de que toda e qualquer informação fornecida será usada estritamente para propósitos acadêmicos e mantido o caráter anônimo nas informações. Agradecemos antecipadamente a sua preciosa colaboração.

SEÇÃO A – SUA OPINIÃO

	FAVOR MARCAR (X) A OPÇÃO MAIS PRÓXIMA COM O SEU PENSAMENTO EM CADA UMA DAS SENTEÇAS APRESENTADAS ABAIXO.	CONCORDO TOTALMENTE	CONCORDO PARCIALMENTE	DISCORDO PARCIALMENTE	DISCORDO TOTALMENTE
A01	Ao escolher uma roupa, eu penso como ou aonde vou usá-la.				
A02	O vestuário e a moda têm a função de chocar e mudar conceitos.				
A03	A cor é um elemento muito pessoal na escolha de uma roupa.				
A04	A facilidade de manutenção é um item essencial na escolha de uma roupa.				
A05	Eu uso o mesmo estilo de "uniforme" mesmo quando não estou trabalhando.				
A06	Eu sempre procuro roupas que durem.				
A07	Eu acredito que as roupas que eu uso podem me fazer parecer mais belo/bela.				
A08	Eu não sei explicar porque gosto de uma roupa em particular.				
A09	Eu penso no que vou vestir em ambientes onde alguns não são do mesmo sexo que eu.				
A10	Eu penso no que vou vestir em ambientes onde alguns são do mesmo sexo que eu.				
A11	Eu considero o caimento das roupas ao escolhê-las.				
A12	Eu levo em conta o clima (previsão do tempo) quando vou vestir algo.				
A13	Eu uso roupas porque não posso sair nu/nua.				
A14	Eu não suporto encontrar alguém vestido/a igual a mim.				
A15	Eu tenho preferência por alguns tecidos ou fibras.				
A16	Eu sempre procuro roupas que sirvam bem ao meu tipo físico.				
A17	Eu adoro roupas que me façam feliz quando eu as uso.				
A18	Eu adoro receber elogios pela minha maneira de vestir.				
A19	Eu sempre procuro itens que me tornem mais sensual.				
A20	Eu compro apenas roupas confortáveis.				
A21	Eu só uso roupas de alta qualidade.				
A22	Eu prefiro roupas que possam ser combinadas entre si.				
A23	Para mim não é possível considerar uma roupa sem levar em conta a moda.				
A24	Eu acredito que algumas roupas podem beneficiar ou prejudicar a minha saúde.				
A25	Se eu gostar de uma roupa, ninguém consegue me convencer a mudar de escolha.				
A26	Na minha opinião a marca da roupa é mais importante que o produto em si.				
A27	O meu estilo de vestir é único.				
A28	Uma das funções do vestuário é disfarçar ou evidenciar o meu corpo.				
A29	O preço é um fator importante quando eu compro roupas.				
A30	Algumas roupas podem me tornar mais elegante e influenciar o meu comportamento.				
A31	Algumas roupas me fazem sentir/parecer mais jovem ou mais idoso/a.				
A32	A roupa que eu visto em cada ocasião é influenciada pelo meu humor.				
A33	Pessoas famosas influenciam o meu jeito de vestir.				
A34	Eu considero importante vestir algum elemento que represente a minha origem.				
A35	O meu vestuário é influenciado pela minha religião.				
A36	As pessoas são julgadas pelo que elas usam.				
A37	Eu prefiro roupas que representem projetos sociais de inclusão de minorias.				
A38	Eu procuro me vestir adequadamente às estações do ano.				
A39	Por favor, escreva uma nova sentença que você considere importante e que na sua opinião não foi contemplada acima. Em seguida julgue-a! _____				
A40	Pense na sua peça de vestuário favorita e responda: por que é a sua favorita? _____				

(Favor completar o verso da folha)

SEÇÃO B – O SEU PERFIL

B01	LOCAL DE RESIDÊNCIA:
01☐	Região Metropol. Recife
02☐	Interior de Pernambuco
03☐	Nordeste
04☐	Norte
05☐	Sul
06☐	Sudeste
07☐	Centro-Oeste
08☐	Brasil
09☐	Outro

B02	RELIGIÃO:
01☐	Budismo
02☐	Catolicismo (Apostólica Romana)
03☐	Protestantismo/Evangelismo
04☐	Espiritismo
05☐	Judaísmo
06☐	Islamismo
07☐	Afro (Umbanda, Candomblé, etc.)
08☐	Sem Religião
09☐	Outra _____

B03	DESCENDÊNCIA:
01☐	Africana
02☐	Árabe
03☐	Indígena
04☐	Européia
05☐	Mestiça/Parda
06☐	Oriental/Amarela
07☐	Branca
08☐	Negra
09☐	Outra _____

B04	EDUCAÇÃO:
01☐	Analfabeto
02☐	Alfabetizado
03☐	Fundamental incompleto
04☐	Fundamental completo
05☐	Médio incompleto
06☐	Médio completo
07☐	Superior incompleto
08☐	Superior completo
09☐	Pós-Graduação - Especialização
10☐	Pós-Graduação - Mestrado
11☐	Pós-Graduação - Doutorado
12☐	Outra_____

B05	OCUPAÇÃO:
01☐	Agroindústria
02☐	Alimentação/Entretenimento
03☐	Comércio
04☐	Desempregado
05☐	Do Lar/Aposentado
06☐	Educação/Saúde
07☐	Estudante
08☐	Poder Público / Militar
09☐	Produção de Bens Industriais
10☐	Profissional Autônomo
11☐	Profissional Ciências/Artes
12☐	Serviços Gerais

B06	IDADE:
01☐	15-19 anos
02☐	20-24 anos
03☐	25-29 anos
04☐	30-34 anos
05☐	35-39 anos
06☐	40-44 anos
07☐	45-49 anos
08☐	50-54 anos
09☐	55-59 anos
10☐	60-64 anos
11☐	65 anos ou mais

B07	RENDA FAMILIAR BRUTA MENSAL:
01☐	Até R$315
02☐	De R$316 a R$675
03☐	De R$676 a R$1298
04☐	De R$1299 a R$2236
05☐	De R$2237 a R$3726
06☐	De R$3727 a R$6220
07☐	Mais de R$6220
08☐	Sem rendimento

B08	GÊNERO:
01☐	Feminino
02☐	Masculino

B09	ALTURA:
	_____metros

B10	PESO:
	_____quilos

B11a	TAMANHOS FEMININOS PARA BUSTO (BLUSA):
01☐	34-36 (74-78 cm - PP)
02☐	38-40 (82-86 cm - P)
03☐	42-44 (90-94 cm - M)
04☐	46-48 (98-102 cm - G)
05☐	50-52 (106-110 cm - GG)
06☐	Outro_____

B12a	TAMANHOS FEMININOS PARA CINTURA (SAIA):
01☐	34-36 (56-60 cm - PP)
02☐	38-40 (64-68 cm - P)
03☐	42-44 (72-76 cm - M)
04☐	46-48 (80-84 cm - G)
05☐	50-52 (88-92 cm - GG)
06☐	Outro_____

B13a	TAMANHOS FEMININOS PARA QUADRIS (CALÇA):
01☐	34-36 (84-88 cm - PP)
02☐	38-40 (92-96 cm - P)
03☐	42-44 (100-104 cm - M)
04☐	46-48 (108-112 cm - G)
05☐	50-52 (116-120 cm - GG)
06☐	Outro_____

B11b	TAMANHOS MASCULINOS PARA COLARINHO (CAMISA):
01☐	0 (33-34 cm - -)
02☐	1 (35-36 cm - PP)
03☐	2 (37-38 cm - P)
04☐	3 (39-40 cm - M)
05☐	4 (41-42 cm - G)
06☐	5 (43-44 cm - GG)
07☐	Outro_____

B12b	TAMANHOS MASCULINOS PARA TÓRAX (TERNO):
01☐	38-40 (76-80 cm - PP)
02☐	42-44(84-88 cm - P)
03☐	46-48 (92-96 cm - M)
04☐	50-52 (100-104 cm - G)
05☐	54-56 (108-112 cm - GG)
06☐	Outro_____

B13b	TAMANHOS MASCULINOS PARA CINTURA (CALÇA):
01☐	34-36 (68-72 cm - PP)
02☐	38-40 (76-80 cm - P)
03☐	42-44 (84-88 cm - M)
04☐	46-48 (92-96 cm - G)
05☐	50-52 (100-104 cm - GG)
06☐	Outro_____

Muito obrigado!!!

Chinese Consumers

KENT INSTITUTE OF ART & DESIGN

问卷调查

这是一份关于服装和时尚消费者倾向性的问卷调查。这个调查是英国肯特艺术学院博士生有关时尚研究课题的一部分。这个调查旨在准确了解消费者对于服装和时尚的需求和喜好，用以指导时尚界业内人士改进产品，从而满足消费者需要。该调查可能根据解剖学和行为学概念的准确性把服装的本质与消费者满意度的反馈联系起来，从而为服装产业提出指导性的建议，并影响其产品的兼容性和潜在拓展性。您的回答将有助于服装行业设计出您所需要的产品。希望您能够对A部分的全部问题逐一做出回答。某些问题也许看起来很相似，但事实上不尽相同，这些问题的设置是为了学术上的准确性。您只需要花一点点时间就可以答完。为了使这次调查的效果更好，您可否对B部分的问题做更多的自我描述。我们保证所有有关于您个人的信息都将严格用于学术研究，这是不记名的调查。对于您的大力支持我们表示深切感谢。

A部分——您的观点

	在下面每句话中，请在最接近您的观点的选项框内打勾。	完全同意	部分同意	部分不同意	完全不同意
A01	我买衣服之前，我会想这件衣服的用途或目的。				
A02	服装/时尚有震撼和改变人观念的功效。				
A03	色彩在服装的选择上属于一个很个人化的考量。				
A04	我选衣服，很注意衣服是否容易打理。				
A05	我会选职业化的服装，不见得是为了工作。				
A06	我总是选耐穿的服装。				
A07	我相信我穿的所有的服装都使我看起来美丽/英俊。				
A08	我无法解释为什么我特别喜欢某些衣服。				
A09	在既有同性又有异性的场合当中，我更加注意我的穿着。				
A10	在只有同性的场合当中，我更加注意我的穿着。				
A11	我选择服装会考虑服装的样式。				
A12	我选择服装会考虑天气的因素。（如晴天或雨天）				
A13	我穿衣服，因为我不能光着身子出去。				
A14	我讨厌别人跟我穿得一样。				
A15	我对服装的质感和材料都有特殊的要求。				
A16	我选择适合我身材的服装。				
A17	我喜欢穿心理上自我感觉很好的衣服。				
A18	我喜欢别人称赞我的穿衣品位和风格。				
A19	我通常会选择使我看起来更加吸引人的服装。				
A20	我只买穿身体上感觉舒服的服装。				
A21	我只穿质地很好的服装。				
A22	我更喜欢选择便于搭配的服装。				
A23	我认为服装与时尚密不可分。				
A24	我认为穿有些服装有利于/不利于健康				
A25	如果我喜欢某件衣服，别人很难改变我的想法				
A26	在我看来，品牌比产品本身更重要。				
A27	我的穿衣风格独一无二。				
A28	服装的功能之一就是隐藏或暴露身体。				
A29	我选衣服，价格是一个重要因素。				
A30	某些衣服能够使我更优雅并影响我的行为。				

A31	某些衣服使我看起来更年轻/年老。				
A32	我每天穿的衣服取决于我的心情				
A33	知名人士的穿着对我的服装选择有影响				
A34	我认为服装的产地与我来自的地区相同是很重要的				
A35	我对服装的选择与我的宗教和信仰有很大的关系。				
A36	我会以他/她人的穿着评判这一个人				
A37	我买衣服考虑社会伦理/道德影响/因素				
A38	我尊重季节或气候来安排我的穿衣 （如春，夏，秋，冬）				
A39	如果上述选项没有符合您的购衣观点的，请补充在下面横线上。并做出判断(请看反面，谢谢！！)				
A40	想一想您最喜欢的服装。为什么您最喜欢它？				

B部分- 你的信息

B01	来自中国的以下地区或城市
01□	东北地区
02□	华北地区
03□	西北地区
04□	华中地区
05□	华南地区
06□	华东地区
07□	西南地区
08□	其他_____

B02	宗教
01□	佛教徒
02□	新天主教徒（基督徒）
03□	正统天主教徒
04□	罗马天主教徒
05□	伊斯兰教徒
06□	道教徒
07□	无神论者
08□	其他_____

B03	民族
01□	汉族
02□	壮族
03□	蒙古族
04□	藏族
05□	白族
06□	维吾尔族
07□	傣族
08□	满族
09□	其他

B04	教育程度
01□	无任何教育程度
02□	小学
03□	初中
04□	高中
05□	中等职业学校/中专
06□	(大学专科(大学本科
07□	(成人/自学大专 (成人/自学本科
08□	硕士/博士
09□	特殊教育/在家接受教育（残疾/特殊智商者）
10□	其他_____

B05	月平均收入
01□	不足500 元
02□	500-999 元
03□	1000-2000 元
04□	2000-3500 元
05□	3500-5000 元
06□	5000~8000元
07□	8000-15000元
08□	15000-30000 元
09□	30000元以上
10□	没有收入
11□	其他

B06	年龄范围
01□	15-19岁
02□	20-24岁
03□	25-29岁
04□	30-34 岁
05□	35-39 岁
06□	40-44 岁
07□	45-49 岁
08□	50-54岁
09□	55-59 岁
10□	60-64 岁
11□	65岁以上

B07	职业
01□	7手工业/个体经营者
02□	饮食/娱乐
03□	商业/金融/证券
04□	国营企业/
05□	自由职业/家庭办公一族
06□	家庭主妇/已退休
07□	教育/医疗
08□	艺术/科技/专业人士
09□	政府部门/军队
10□	学生
11□	无工作
12□	其他_市场_____

B08	性别
01□	女
02□	男

B09	身高:
	_____((厘米/)

B10	体重:
	_____(公斤)

B11b	男服尺寸-上身 （颈围cm）	B12b	男服尺寸-上身 （胸围cm）	B13b	男服尺寸-下身 （腰围cm）:
01☐	(37-38cm - S)	01☐	40" (78-81cm - XS)	01☐	36" (70-73cm - S)
02☐	(39-40cm - M)	02☐	42" (82-85cm - XS)	02☐	38" (74-77cm - S)
03☐	(41--42cm - L)	03☐	44" (86-89cm - S)	03☐	40" (78-81cm - M)
04☐	(43-44cm - XL)	04☐	46" (90-93cm - S)	04☐	42" (82-85cm - M)
05☐	(45-46cm - XLL)	05☐	48" (94-97cm - M)	05☐	44" (86-89cm - L)
06☐	(47-48cm - XLLL)	06☐	50" (98-101cm - M)	06☐	46" (90-93cm - L)
07☐	其他_____	07☐	52" (102-105cm - L)	07☐	48" (94-97cm - XL)
		08☐	54" (106-109cm - L)	08☐	50" (98-101cm - XL)
		09☐	56" (110-113cm - XL)	09☐	52" (102-105cm - XXL)
		10☐	58" (114-117cm - XL)	10☐	其他_____
		11☐	其他_____		

Thank you very much!!!

D – DESIGNER DATA PROCEDURES

D1 Designer Report

what	when	how	who	where
FASHION DESIGNER RESEARCH United Kingdom		Specific questionnaire • Section 1 – the creative process • Section 2 – your decisions • Section 3 – degree of importance • Section 4 – your consumer perception	interview	
	22jun05	Amer Kamal		Medway
	24jun05	Antonio Ciutto		London
	28jun05	Trilogia	Saeunn Thordanttic	London
	29jun05	Jatin Patel		Medway
	01jul05	Jean-Pierre Braganza		London
	10jul05	Y.id	Lei Liu	Medway
FASHION DESIGNER RESEARCH Brazil		Specific questionnaire • Section 1 – the creative process • Section 2 – your decisions • Section 3 – degree of importance • Section 4 – your consumer perception	interview	
	19/07/2005	V.Rom	Igor de Barros	Sao Paulo
	19/07/2005	Erika Ikezilli		Sao Paulo
	20/07/2005	Karlla Girotto		Sao Paulo
	27/07/2005	Felipe Eiras		Rio de Janeiro
	28/07/2005	Zigfreda	Katia Wille	Rio de Janeiro
	28/07/2005	Santa Ephigenia	Luciano Canale	Rio de Janeiro
	02/09/2005	Dijolly	Elizangela Florencio	Caruaru
	19/09/2005	Fatima Rendas	Fatima Mergulhao	Recife
	26/09/2005	Pirony	Lais Monte Teixeira	Recife
FASHION DESIGNER RESEARCH China		Specific questionnaire • Section 1 – the creative process • Section 2 – your decisions • Section 3 – degree of importance • Section 4 – your consumer perception	interview	
	01/11/2005	Exception	Ma Ke Coco	Guangzhou
	01/11/2005	UCLA	David	Guangzhou
	01/11/2005	Pepsi Sport	Ken	Guangzhou
	05/11/2005	ZucZug	Yang Wang	Shanghai
	05/11/2005	Paralell Design	Zhang Da	Shanghai

D2 Designer Interview

British Designers

KENT INSTITUTE OF ART & DESIGN

INTERVIEW WITH DESIGNERS

Designer Name: _____ Brand Name:_____ Date: _____

A 11

1.	How does your product development start? (Inspiration? Consumer? Marketing-sales?)
2.	Do you use any kind of consumer research?
3.	Do you consider: Trends pr exhibitions/fair trades catwalks celebrities consumer research advertising display/sales space customer post sale services
4.	Do you have any evaluation tool for: Creation/production – manufacturing User/satisfaction Price – cost/profit Sales – why are low or high
5.	Do you test your product before launch it?
6.	Do you establish previous aims?
7.	Who has the empowerment for making decisions in your company? Creative, mkt, mngt team?
8.	What is your differential among other designers?
9.	Are you aware about your competitors?
10.	How long have you been in fashion business?
11.	Have you a formal fashion design education?
12.	Which skills do you think you have as the most strong?
13.	Which skills do you think you need to improve?
14.	How many people work with you?
15.	How big is your monthly production?
16.	What is the range of your prices?
17.	How do you define who is your target? Do you have a specific group? Who are they?
18.	Do you target domestic, European or global market? Do you need to adjust product due the market?
19.	What is your cultural background, ethnical or social influences?
20.	Do you have any special media to or celebrities who promote your product?

21. It is presented bellow some subjects in a bipolar way. Mark the space that could represent closer your decisions.

TRENDS								INSPIRATION
BODY								MIND
LUXURY								DIFFUSION
SALES-DRIVEN								CONSUMER-DRIVEN
SOCIAL RESPONSIBILITY								BUSINESS PERFORMANCE
LARGE SCALE								EXCLUSIVITY
LONG LASTING								DISPOSAL
PRICE								QUALITY
IDEA								PRACTICABILITY
PSYCHO								PHYSIC
TECHNO								HANDMADE
LOCAL								GLOBAL

22. Choose from 1 to 7 (lower to high), the degree of importance that you give for:

	1	2	3	4	5	6	7
QUALITY							
INNOVATION							
RESPONSIVENESS							
EFFICIENCY							

23. Indicate from 1 to 7 (lower to high), the degree of importance that your company gives to the relation between your products and the consumer perception of:

		1	2	3	4	5
1.	CLIMATE					
2.	MORAL CONVENTIONS					
3.	HEALTH					
4.	AGE APPEARANCE					
5.	FUNCTIONALITY					
6.	COMFORT					
7.	DURABILITY					
8.	PRICE					
9.	PROFESSION					
10.	QUALITY					
11.	FABRIC					
12.	PHYSICAL ADEQUACY					
13.	WELFARE					
14.	BALANCE - FIT					
15.	FASHION					
16.	EASE-OF-CARE					
17.	VERSATILITY					
18.	BEAUTY					
19.	ELEGANCE					
20.	BODY EXPOSURE					
21.	BRAND					
22.	DETACHMENT					
23.	SENSUALITY					
24.	COLOUR					
25.	PERSONAL STYLE					
26.	TASTE					
27.	BOLDNESS					
28.	ATTRACTION TO PARTICULAR CLOTHES					
29.	EXCLUSIVITY					
30.	SAME GENDER					
31.	OPPOSITE GENDER					
32.	MOOD					
33.	CELEBRITIES INFFLUENCE					
34.	ETHNICITY					
35.	RELIGION					
36.	IMAGE JUDGEMENT					
37.	IDEOLOGY					
38.	SEASONALITY					

Thank you!

Brazilian Designers

KENT INSTITUTE OF ART & DESIGN

ENTREVISTA COM DESIGNERS

Nome do Designer: _____ Marca: _____ Data: _____

1.	Como o seu processo de desenvolvimento de produto começa (Inspiração? Consumidor? Marketing? Vendas?) .
2.	Você utiliza algum tipo de pesquisa de consumidor?.
3.	Você considera: Tendências de moda . Relações públicas . Exibições/feiras . Desfiles . Celebridades . Pesquisa de consumo . Publicidade . Vitrines/pontos de venda . Serviço pós-venda .
4.	Você possui alguma ferramenta de avaliação para: Criação/produção - manufatura . Usuário/satisfação . Preço – custo/lucro . Vendas – porque estão altas ou baixas .
5.	Você testa o seu produto antes de lançá-lo?.
6.	Você estabelece metas objetivos e prévios?.
7.	Quem tem o poder das decisões em sua empresa? Equipe criativa, marketing, gerenciamento, etc.?
8.	Qual o seu diferencial em relação aos outros designers?
9.	Você se preocupa com os seus competidores?.
10.	Há quanto tempo você atua no negócio de moda?.
11.	Você tem uma formação educacional relacionada com moda?.
12.	Quais das suas habilidades você considera as mais fortes?
13.	Quais as habilidades que você gostaria de melhorar?
14.	Quantas pessoas trabalham com você?
15.	Qual a quantidade de peças que você produz mensalmente?.
16.	Qual o intervalo de preços dos seus produtos?.
17.	Com você define quem é o seu público alvo? Você se dedica a um alvo específico? Quem? .
18.	Você visa mercado doméstico, Brasileiro, Americano, Europeu ou Global? Você faz ajustes nos produtos de acordo com o mercado?.
19.	Qual a sua herança cultural ou influências étnicas ou sociais? .
20.	Você tem alguma mídia especial ou celebridades para promover os seus produtos? .

21. Abaixo há temas apresentados em uma escala bipolar. Marque o espaço que melhor represente as suas decisões.

	3	2	1	0	1	2	3	
TENDÊNCIAS								INSPIRAÇÃO
CORPO								MENTE
LUXO								DIFUSÃO
DIRECIONADO PARA VENDAS								DIRECIONADO PARA CLIENTE
RESPONSABILIDADE SOCIAL								DESEMPENHO NOS NEGÓCIOS
LARGA ESCALA								EXCLUSIVIDADE
PRODUTO DURADOURO								PRODUTO DESCARTÁVEL
PREÇO								QUALIDADE
IDÉIA								PRATICIDADE
PSICO								FÍSICO
LOCAL								GLOBAL
TECNOLOGIA								FEITO À MÃO

22. Escolha de 1 a 7 (baixo a alto), o grau de importância que a sua empresa considera para:

	1	2	3	4	5	6	7
QUALIDADE							
INOVAÇÃO							
HABILIDADE DE RESPOSTA AO CONSUMIDOR							
EFICIÊNCIA							

23. Indique de 1 a 7 (baixo a alto), o grau de importância que a sua empresa dá à relação entre os seus produtos e a percepção do consumidor para:

	1	2	3	4	5
CLIMA DO AMBIENTE					
CONVENÇÕES MORAIS					
SAÚDE					
APARÊNCIA RELACIONADA À IDADE					
FUNCIONALIDADE					
CONFORT					
DURABILIDADE					
PREÇO					
PROFISSÃO					
QUALIDADE					
TECIDO					
ADEQUAÇÃO ANATÔMICA					
BEM ESTAR					
CAIMENTO – MODELAGEM					
MODA					
MANUTENÇÃO					
VERSATILIDADE					
BELEZA					
ELEGÂNCIA					
EXIBIÇÃO DO CORPO					
MARCA					
SER NOTADA (O)					
SENSUALIDADE					
COR					
ESTILO PESSOAL					
GOSTO					
OUSADIA					
ATRAÇÃO POR ALGO EM PARTICULAR					
EXCLUSIVIDADE					
MESMO SEXO					
SEXO OPOSTO					
HUMOR					
INFLUÊNCIA DE CELEBRIDADES					
ETNICIDADE					

RELIGIÃO					
JULGAMENTO DE APARÊNCIA					
IDEOLOGIA					
SAZONALIDADE – ESTAÇÕES DO ANO					

Muito Obrigada!

Chinese Designers

university college for the
creative arts
at canterbury, epsom, farnham, maidstone and rochester

INTERVIEW WITH DESIGNERS

Designer Name: _____ Brand Name: _____ Date: _____

1.	How does your product development start? (Inspiration? Consumer? Marketing-sales?)
2.	Do you use any kind of consumer research?
3.	Do you consider: Trends　　pr　　exhibitions/fair trades　　catwalks　　celebrities consumer research　　advertising　　display/sales space　　customer post sale services
4.	Do you have any evaluation tool for: Creation/production – manufacturing　　　　　User/satisfaction Price – cost/profit　　　　　Sales – why are low or high
5.	Do you test your product before launch it?
6.	Do you establish previous aims?
7.	Who has the empowerment for making decisions in your company? Creative, mkt, mngt team?
8.	What is your differential among other designers?
9.	Are you aware about your competitors?
10.	How long have you been in fashion business?
11.	Have you a formal fashion design education?
12.	Which skills do you think you have as the most strong?
13.	Which skills do you think you need to improve?
14.	How many people work with you?
15.	How big is your monthly production?
16.	What is the range of your prices?
17.	How do you define who is your target? Do you have a specific group? Who are they?
18.	Do you target domestic, European or global market? Do you need to adjust product due the market?
19.	What is your cultural background, ethnical or social influences?
20.	Do you have any special media to or celebrities who promote your product?

It is presented bellow some subjects in a bipolar way. Mark the space that could represent closer your decisions.

TRENDS							INSPIRATION	
BODY							MIND	
LUXURY							DIFFUSION	
SALES-DRIVEN							CONSUMER-DRIVEN	
SOCIAL RESPONSIBILITY							BUSINESS PERFORMANCE	
LARGE SCALE							EXCLUSIVITY	

	LONG LASTING								DISPOSAL			
	PRICE								QUALITY			
	IDEA								PRACTICABILITY			
	PSYCHO								PHYSIC			
	TECHNO								HANDMADE			
	LOCAL								GLOBAL			

Choose from 1 to 7 (lower to high), the degree of importance that you give for:

	1	2	3	4	5	6	7
QUALITY							
INNOVATION							
RESPONSIVENESS							
EFFICIENCY							

Indicate from 1 to 7 (lower to high), the degree of importance that your company gives to the relation between your products and the consumer perception of:

		1	2	3	4	5
1.	CLIMATE					
2.	MORAL CONVENTIONS					
3.	HEALTH					
4.	AGE APPEARANCE					
5.	FUNCTIONALITY					
6.	COMFORT					
7.	DURABILITY					
8.	PRICE					
9.	PROFESSION					
10.	QUALITY					
11.	FABRIC					
12.	PHYSICAL ADEQUACY					
13.	WELFARE					
14.	BALANCE - FIT					
15.	FASHION					
16.	EASE-OF-CARE					
17.	VERSATILITY					
18.	BEAUTY					
19.	ELEGANCE					
20.	BODY EXPOSURE					
21.	BRAND					
22.	DETACHMENT					
23.	SENSUALITY					
24.	COLOUR					
25.	PERSONAL STYLE					
26.	TASTE					
27.	BOLDNESS					
28.	ATTRACTION TO PARTICULAR CLOTHES					

29.	EXCLUSIVITY					
30.	SAME GENDER					
31.	OPPOSITE GENDER					
32.	MOOD					
33.	CELEBRITIES INFFLUENCE					
34.	ETHNICITY					
35.	RELIGION					
36.	IMAGE JUDGEMENT					
37.	IDEOLOGY					
38.	SEASONALITY					

Thank you!

E – COMPANY DATA PROCEDURES

E1 Company Report

what	when	how	who	where
FASHION COMPANY RESEARCH United Kingdom		Specific questionnaire • Section 1 – the company • Section 2 – the business • Section 3 – the market • Section 4 – the design • Section 5 – the production • Section 6 – the promotion • Section 7 – the sales • Section 8 - the consumer • Section 9 – your decisions • Section 10 – degree of importance • Section 11 – your consumer perception	interview	
	05may05	Nike Active Life	Lucy Simpson	London
	08jun05	Jasper Conran	Anne-Marie Nicol	London
	17jun05	Harriet's Muse	Craig	London
	jun05	Burro	Olaf Parker	Sevenoaks
	05jul05	AnaMika	Amit Rastogi	London
	03may05	NewLook	Jean Perry	London
FASHION COMPANY RESEARCH Brazil		Specific questionnaire • Section 1 – the company • Section 2 – the business • Section 3 – the market • Section 4 – the design • Section 5 – the production • Section 6 – the promotion • Section 7 – the sales • Section 8 - the consumer • Section 9 – your decisions • Section 10 – degree of importance • Section 11 – your consumer perception	interview	
	22/07/2005	Ellus	Tubi Schiavetti	Sao Paulo
	22/07/2005	Zapping	Cristiana Katagiri	Sao Paulo
	23/07/2005	Fucsia	Karla Montenegro	Sao Paulo
	26/07/2005	Complexo B	Beto Neves	Rio de Janeiro
	26/07/2005	Gourgeous	Paulo Fulco	Rio de Janeiro
	29/07/2005	OEstudio	Anne Gaul	Rio de Janeiro
	02/09/2005	Rota do Mar	Arnaldo Xavier	Sta Cruz Capibaribe
	15/09/2005	Driif	Maria Ferreira	Recife
	27/09/2005	Movimento	Leucio Marques	Recife
FASHION COMPANY RESEARCH China		Specific questionnaire • Section 1 – the company • Section 2 – the business • Section 3 – the market • Section 4 – the design • Section 5 – the production • Section 6 – the promotion • Section 7 – the sales • Section 8 - the consumer • Section 9 – your decisions • Section 10 – degree of importance	interview	

	04/11/2005	• Section 11 – your consumer perception		
	04/11/2005	Running Group	Thomas Lee	Shanghai
	04/11/2005	Judy Hua	Wang Dan Dan	Shanghai
	08/11/2005	E-Mail	Chun Yan Wang	Beijing
	09/11/2005	Vesa's	Wei Wang	Beijing
	10/11/2005	Shenshi	Huang Nan	Beijing

E2 Company Interview

British Companies

KENT INSTITUTE OF ART & DESIGN

INTERVIEW WITH COMPANIES

Interviewer Name:_____Position held:_____

Company Name:_____Brand Name (s):_____ Date: _____

SECTION 01 – THE COMPANY
What is the mission of your company?
What is the message of your brand?
How do you measure your performance? How often?
What are the strengths of your company?
What areas of improvement do you envisage?
How many people work with you?
How do different teams communicate inside your company?

SECTION 02 – THE BUSINESS
What is the core of your business?
Who are your stakeholders?
What kind of competitive advantage do you have?
Who are your competitors?
How do you identify opportunities?
How do you identify threats?
How long has your company been in fashion business?

SECTION 03 – THE MARKET MANAGEMENT
Do you target domestic, European or global market?
Do you need to adjust product due the market?
Would you describe your product mix (portfolio) in percentage?
How do you measure the consumer needs?
Is your marketing team in house? How many people?
Do you have any marketing evaluation tool?
Is there any designer on the marketing decision board?
What is the range of your prices? How do you decide your prices?

SECTION 04 – THE DESIGN MANAGEMENT
How does the product process development go?
Do you work based in collections?
Is your design team in house? How many people?

	Do your products follow trends?
	Is there any marketing person on the product decision board?
	Do you have any design evaluation tool?
	Do you test your products with users before launch? How does it happen?

SECTION 05 – THE PRODUCTION MANAGEMENT

	How big is your monthly production?
	Do you produce any item in house? Which one and why?
	What kind of companies do you have as suppliers?

SECTION 06 – THE PROMOTION MANAGEMENT

	Is your promotion team in house? How many people?
	How do you create value for your products?
	How do you promote your products?
	Is there any designer on the promotion decision board?
	Do you have any special media to promote your product?
	Do you have any celebrities who promote your product?

SECTION 07 – THE SALES MANAGEMENT

	How many shop points do you have? Flagship, stockists, representatives
	Do you have online shop?
	How big in percentage is your e-commerce?

SECTION 08 – THE CONSUMER RELATIONSHIP

	Who is your consumer?
	Do you have a specific group?
	How do you define who is your target?
	How do you know the consumer needs?
	How do you measure consumer satisfaction?
	What kind of resources you use to get the consumer?

It is presented bellow some subjects in a bipolar way. Mark the space that could represent your decisions closer.

PROFITABILITY							COMMITMENT
CONSUMER							MARKET
PRODUCT							PRODUCTION
SALES-DRIVEN							CONSUMER-DRIVEN
SOCIAL RESPONSIBILITY							BUSINESS PERFORMANCE
LARGE SCALE							EXCLUSIVITY
LONG LASTING							DISPOSAL
PRICE							QUALITY
PROMOTION							FIDELITY
WORD OF MOUTH							BILLBOARDS
FAIR TRADE							LOW COST
LOCAL							GLOBAL
TECHNO							HAND MADE

Choose from 1 to 7, the degree of importance for:

	1	2	3	4	5	6	7
Quality							
Innovation							
Responsiveness							
Efficiency							

Thank you!

Brazilian Companies

KENT INSTITUTE OF ART & DESIGN

ENTREVISTA COM EMPRESAS

Este questionário diz respeito a atividades da indústria da moda e é parte da pesquisa de doutoramento em Moda de uma estudante do KIAD em Rochester, Reino Unido. Essa pesquisa tem como principal objetivo apontar possibilidades de melhoria no desenvolvimento de produtos de moda.

Espera-se a sua contribuição à pesquisa indicando a sua opinião em cada uma das questões. Sinta-se à vontade para marcar ou anotar tudo que você ache importante sobre o tema. Está garantido que essas informações serão utilizadas unicamente para fins acadêmicos. Muito obrigada pelo seu apoio.

Nome do entrevistado:_____Cargo :_____

Nome da empresa:_____Nome da Marca (s):_____ Data: _____

SEÇÃO 01 – A EMPRESA	
	Qual a missão da sua empresa?
	Qual a mensagem da sua marca?
	Como você mede desempenho? Com que freqüência?
	Quais são os pontos fortes da sua empresa?
	Quais as áreas que você planeja melhorar?
	Quantas pessoas trabalham com você?
	Como diferentes setores se comunicam dentro da empresa?
SEÇÃO 02 – O NEGÓCIO	
	Qual é o foco do seu negócio?
	Quem são as pessoas importantes para o seu negócio?
	Que tipo de vantagem competitiva você tem?
	Quem são os seus competidores?
	Como você identifica oportunidades?
	Como você indentica ameaças?
	Há quanto tempo sua empresa está no negócio da moda?
SEÇÃO 03 – GERENCIAMENTO DE MERCADO	
	Você trabalha com mercado doméstico, Brasileiro, Americano, Europeu ou Global?
	Você faz ajustes no produto de acordo com o mercado?
	Como você descreve o seu mix de produtos (portfólio) em percentual?
	Como você monitora as necessidades do seu consumidor?
	A sua equipe de marketing é interno à empresa? Quantas pessoas?
	Você tem alguma ferramenta de avaliação do marketing?
	Há algum designer presente nas reuniões do marketing?
	Qual é a variação dos seus preços? Como você decide os seus preços?
SEÇÃO 04 – O GERENCIAMENTO DO DESIGN	
	Como o processo de desenvolvimento de produto acontece?
	Seu trabalho é baseado em coleções?
	A sua equipe de design é interno à empresa? Quantas pessoas?
	Os seus produtos seguem tendências?
	Tem alguém de marketing nas reuniões de design?
	Você tem alguma ferramenta de avaliação de design?
	Você faz algum teste com os produtos antes do lançamento? Como acontece?

SEÇÃO 05 – O GERENCIAMENTO DE PRODUÇÃO	
	Quantas unidades você produz por mês?
	A sua produção é interna à empresa? O que e por quê?
	Que tipo de empresas você tem como fornecedoras?
SEÇÃO 06 – O GERENCIAMENTO DE PROMOÇÃO	
	A sua equipe de promoção é interna à empresa? Quantas pessoas?
	Como você cria valor para os seus produtos?
	Como você promove os seus produtos?
	Há algum designer presente nas reuniões da equipe de promoção?
	Você usa alguma mídia em especial para promover os seus produtos?
	Você tem alguma celebridade que promove seus produtos?
SEÇÃO 07 – O GERENCIAMENTO DE VENDAS	
	Quantos pontos de venda você tem?.
	Você tem loja na internet?
	Quanto em percentual representa a sua venda pela Internet?
SEÇÃO 08 – O RELACIONAMENTO COM O CONSUMIDOR	
	Quem é o seu consumidor?
	Você tem um grupo específico como alvo?
	Como você define que é o seu alvo?
	Como você sabe quais são as necessidades deles?
	Como você mede a satisfação do seu consumidor?
	Quais os recursos que você usa para atrair consumidores?

Abaixo há temas apresentados em uma escala bipolar. Marque o espaço que melhor represente as suas decisões.

	3	2	1	0	1	2	3	
LUCRATIVIDADE								COMPROMISSO
CONSUMIDOR								MERCADO
PRODUTO								PRODUÇÃO
DIRECIONADO PARA VENDAS								DIRECIONADO PARA CLIENTE
RESPONSABILIDADE SOCIAL								DESEMPENHO NOS NEGÓCIOS
LARGA ESCALA								EXCLUSIVIDADE
PRODUTO DURADOURO								PRODUTO DESCARTÁVEL
PREÇO								QUALIDADE
PROMOÇÃO								FIDELIDADE
BOCA A BOCA								OUTDOORS
COMÉRCIO JUSTO								BAIXO CUSTO
LOCAL								GLOBAL
TECNOLOGIA								FEITO À MÃO

Escolha de 1 a 7 (baixo a alto), o grau de importância que a sua empresa considera para:

	1	2	3	4	5	6	7
QUALIDADE							
INOVAÇÃO							
HABILIDADE DE RESPOSTA AO CONSUMIDOR							
EFICIÊNCIA							

Indique de 1 a 7 (baixo a alto), o grau de importância que a sua empresa dá à relação entre os seus produtos e a percepção do consumidor para:

	1	2	3	4	5
CLIMA DO AMBIENTE					
CONVENÇÕES MORAIS					
SAÚDE					
APARÊNCIA RELACIONADA À IDADE					
FUNCIONALIDADE					
CONFORT					
DURABILIDADE					
PREÇO					
PROFISSÃO					
QUALIDADE					
TECIDO					
ADEQUAÇÃO ANATÔMICA					
BEM ESTAR					
CAIMENTO – MODELAGEM					
MODA					
MANUTENÇÃO					
VERSATILIDADE					
BELEZA					
ELEGÂNCIA					
EXIBIÇÃO DO CORPO					
MARCA					
SER NOTADA (O)					
SENSUALIDADE					
COR					
ESTILO PESSOAL					
GOSTO					
OUSADIA					
ATRAÇÃO POR ALGO EM PARTICULAR					
EXCLUSIVIDADE					
MESMO SEXO					
SEXO OPOSTO					
HUMOR					
INFLUÊNCIA DE CELEBRIDADES					
ETNICIDADE					
RELIGIÃO					
JULGAMENTO DE APARÊNCIA					
IDEOLOGIA					
SAZONALIDADE – ESTAÇÕES DO ANO					

Muito Obrigada!

Chinese Companies

university college for the
creative arts
of canterbury, epsom, farnham, maidstone and rochester

INTERVIEW WITH COMPANIES

This questionnaire concerns fashion industry activity as part of a Fashion PhD student's research at UCreative at Rochester. This research has as a main objective the pinpointing of possibilities of improvement in the development of fashion products.

I hope you can help by indicating your opinion for each question. Feel free to mark and take notes of everything you find important in relation to the subject. I guarantee that all information will be used strictly for academic purposes. Thank you very much for your support.

Interviewer Name:_____ Position held:_____

Company Name:_____ Brand Name (s):_____ Date: _____

SECTION 01 – THE COMPANY
What is the mission of your company? .
What is the message of your brand?
How do you measure your performance? How often?
What are the strengths of your company?
What areas of improvement do you envisage?
How many people work with you?
How do different teams communicate inside your company?

SECTION 02 – THE BUSINESS
What is the core of your business?
Who are your stakeholders?
What kind of competitive advantage do you have?
Who are your competitors?
How do you identify opportunities?
How do you identify threats?
How long has your company been in fashion business?

SECTION 03 – THE MARKET MANAGEMENT
Do you target domestic, European or global market?
Do you need to adjust product due the market?
Would you describe your product mix (portfolio) in percentage?
How do you measure the consumer needs?
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What is the range of your prices? How do you decide your prices?

SECTION 04 – THE DESIGN MANAGEMENT
How does the product process development go?

	Do you work based in collections?
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	Is there any marketing person on the product decision board?
	Do you have any design evaluation tool?
	Do you test your products with users before launch? How does it happen?
SECTION 05 – THE PRODUCTION MANAGEMENT	
	How big is your monthly production?
	Do you produce any item in house? Which one and why?
	What kind of companies do you have as suppliers?
SECTION 06 – THE PROMOTION MANAGEMENT	
	Is your promotion team in house? How many people?
	How do you create value for your products?
	How do you promote your products?
	Is there any designer on the promotion decision board?
	Do you have any special media to promote your product?
	Do you have any celebrities who promote your product?
SECTION 07 – THE SALES MANAGEMENT	
	How many shop points do you have?
	Do you have online shop?
	How big in percentage is your e-commerce?
SECTION 08 – THE CONSUMER RELATIONSHIP	
	Who is your consumer?
	Do you have a specific group?
	How do you define who is your target?
	How do you know the consumer needs?
	How do you measure consumer satisfaction?
	What kind of resources you use to get the consumer?

It is presented bellow some subjects in a bipolar way. Mark the space that could represent closer your decisions.

	3	2	1	0	1	2	3	
PROFITABILITY								COMMITMENT
CONSUMER								MARKET
PRODUCT								PRODUCTION
SALES-DRIVEN								CONSUMER-DRIVEN
SOCIAL RESPONSIBILITY								BUSINESS PERFORMANCE
LARGE SCALE								EXCLUSIVITY
LONG LASTING								DISPOSAL
PRICE								QUALITY
PROMOTION								FIDELITY

WORD OF MOUTH							BILLBOARDS		
FAIR TRADE							LOW COST		
LOCAL							GLOBAL		
TECHNO							HAND MADE		

Choose from 1 to 7 (lower to high), the degree of importance that your company gives for:

	1	2	3	4	5	6	7
QUALITY							
INNOVATION							
RESPONSIVENESS							
EFFICIENCY							

Indicate from 1 to 5 (lower to high), the degree of importance that your company gives to the relation between your products and the consumer perception of:

		1	2	3	4	5
	CLIMATE					
	MORAL CONVENTIONS					
	HEALTH					
	AGE APPEARANCE					
	FUNCTIONALITY					
	COMFORT					
	DURABILITY					
	PRICE					
	PROFESSION					
	QUALITY					
	FABRIC					
	PHYSICAL ADEQUACY					
	WELFARE					
	BALANCE - FIT					
	FASHION					
	EASE-OF-CARE					
	VERSATILITY					
	BEAUTY					
	ELEGANCE					
	BODY EXPOSURE					
	BRAND					
	DETACHMENT					
	SENSUALITY					
	COLOUR					
	PERSONAL STYLE					
	TASTE					
	BOLDNESS					
	ATTRACTION TO PARTICULAR CLOTHES					
	EXCLUSIVITY					

	SAME GENDER					
	OPPOSITE GENDER					
	MOOD					
	CELEBRITIES INFFLUENCE					
	ETHNICITY					
	RELIGION					
	IMAGE JUDGEMENT					
	IDEOLOGY					
	SEASONALITY					

Thank you!

F – SAMPLE DIARY

F1 Sample Syntax Sheet - Factor Analysis (SPSS)
(Formation of the Self Actualisation Need within the Brazilian consumer sample)

```
FACTOR
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 /CRITERIA MINEIGEN(1) ITERATE(25)
 /EXTRACTION PC
 /CRITERIA ITERATE(25)
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 /SAVE REG(ALL)
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RELIABILITY
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 /FORMAT=NOLABELS
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 /STATISTICS=DESCRIPTIVE CORR COV
 /SUMMARY=TOTAL .

FACTOR
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 /MISSING LISTWISE /ANALYSIS a08 a17 a03 a25 a02
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 /SUMMARY=TOTAL .

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 /FORMAT=NOLABELS
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/STATISTICS=DESCRIPTIVE CORR COV
/SUMMARY=TOTAL .

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 /PRINT INITIAL CORRELATION SIG KMO EXTRACTION ROTATION
 /CRITERIA MINEIGEN(1) ITERATE(25)
 /EXTRACTION PC
 /CRITERIA ITERATE(25)
 /ROTATION VARIMAX
 /SAVE REG(ALL)
 /METHOD=CORRELATION .

RELIABILITY
 /VARIABLES=a17 a03 a25
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 /SCALE(ALPHA)=ALL/MODEL=ALPHA
 /STATISTICS=DESCRIPTIVE CORR COV
 /SUMMARY=TOTAL .

F2 Sample Output Sheet - Factor Analysis (SPSS)
(Formation of the Self Actualisation Need within the Brazilian consumer sample)

Self Actualisation Need:
1st Iteration
Factor Analysis

Notes

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	Cases Used	LISTWISE: Statistics are based on cases with no missing values for any variable used.
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		/EXTRACTION PC
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	FAC2_41	Component score 2
	FAC3_41	Component score 3

Correlation Matrix

		attraction to particular clothes	welfare	colour	personal style	taste	boldness
Correlation	attraction to particular clothes	1.000	.057	.075	.105	.031	-.012
	welfare	.057	1.000	.423	-.049	.286	.131
	colour	.075	.423	1.000	-.096	.218	-.033
	personal style	.105	-.049	-.096	1.000	.281	.080
	taste	.031	.286	.218	.281	1.000	.018
	boldness	-.012	.131	-.033	.080	.018	1.000
Sig. (1-tailed)	attraction to particular clothes		.163	.098	.034	.299	.420
	welfare	.163		.000	.200	.000	.012
	colour	.098	.000		.048	.000	.284
	personal style	.034	.200	.048		.000	.084
	taste	.299	.000	.000	.000		.377
	boldness	.420	.012	.284	.084	.377	

KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.519
Bartlett's Test of Sphericity	Approx. Chi-Square	138.216
	df	15
	Sig.	.000

Communalities

	Initial	Extraction
attraction to particular clothes	1.000	.406
welfare	1.000	.705
colour	1.000	.694
personal style	1.000	.780
taste	1.000	.595
boldness	1.000	.747

Extraction Method: Principal Component Analysis.

Total Variance Explained

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	1.658	27.634	27.634	1.658	27.634	27.634	1.589	26.475	26.475
2	1.236	20.599	48.233	1.236	20.599	48.233	1.304	21.732	48.207
3	1.033	17.218	65.451	1.033	17.218	65.451	1.035	17.243	65.451
4	.964	16.060	81.511						
5	.582	9.701	91.212						
6	.527	8.788	100.000						

Extraction Method: Principal Component Analysis.

Component Matrix(a)

	Component		
	1	2	3
attraction to particular clothes	.205	.234	-.556
welfare	.783	-.255	.165
colour	.713	-.408	-.139
personal style	.173	.864	-.059
taste	.664	.389	-.051
boldness	.156	.227	.820

Extraction Method: Principal Component Analysis.
a 3 components extracted.

Rotated Component Matrix(a)

	Component		
	1	2	3
attraction to particular clothes	.082	.341	-.531
welfare	.822	.071	.155
colour	.814	-.071	-.161
personal style	-.194	.861	.016
taste	.448	.628	-.008
boldness	.066	.202	.838

Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalisation.
a Rotation converged in 4 iterations.

Component Transformation Matrix

Component	1	2	3
1	.914	.405	.015
2	-.405	.910	.083
3	.020	-.082	.996

Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalisation.

Reliability
Case Processing Summary

		N	%
Cases	Valid	299	93.4
	Excluded(a)	21	6.6
	Total	320	100.0

a Listwise deletion based on all variables in the procedure.

A 32

Reliability Statistics

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.369	.403	6

Item Statistics

	Mean	Std. Deviation	N
attraction to particular clothes	2.3880	1.12177	299
welfare	3.6856	.76071	299
colour	3.6321	.70361	299
personal style	2.2174	1.04411	299
taste	3.1371	.98543	299
boldness	2.6722	1.01644	299

Inter-Item Correlation Matrix

	attraction to particular clothes	welfare	colour	personal style	taste	boldness
attraction to particular clothes	1.000	.057	.075	.105	.031	-.012
welfare	.057	1.000	.423	-.049	.286	.131
colour	.075	.423	1.000	-.096	.218	-.033
personal style	.105	-.049	-.096	1.000	.281	.080
taste	.031	.286	.218	.281	1.000	.018
boldness	-.012	.131	-.033	.080	.018	1.000

The covariance matrix is calculated and used in the analysis.

Inter-Item Covariance Matrix

	attraction to particular clothes	welfare	colour	personal style	taste	boldness
attraction to particular clothes	1.258	.049	.059	.123	.034	-.013
welfare	.049	.579	.226	-.039	.214	.101
colour	.059	.226	.495	-.071	.151	-.024
personal style	.123	-.039	-.071	1.090	.289	.085
taste	.034	.214	.151	.289	.971	.018
boldness	-.013	.101	-.024	.085	.018	1.033

The covariance matrix is calculated and used in the analysis.

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Squared Multiple Correlation	Cronbach's Alpha if Item Deleted
attraction to particular clothes	15.3445	6.072	.091	.021	.392
welfare	14.0468	6.152	.292	.246	.265
colour	14.1003	6.654	.189	.211	.324
personal style	15.5151	5.969	.152	.130	.342
taste	14.5953	5.450	.307	.188	.228
boldness	15.0602	6.466	.065	.035	.401

Self Actualisation Need:
2nd Iteration
Factor Analysis

Notes

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	Split File	<none>
	N of Rows in Working Data File	320
Missing Value Handling	Definition of Missing	MISSING=EXCLUDE: User-defined missing values are treated as missing.
	Cases Used	LISTWISE: Statistics are based on cases with no missing values for any variable used.
Syntax		FACTOR
		/VARIABLES a08 a17 a03 a25 a02

A 33

```
                                              /MISSING LISTWISE /ANALYSIS a08 a17 a03 a25 a02
                                              /PRINT INITIAL CORRELATION SIG KMO EXTRACTION
                              ROTATION
                                              /CRITERIA MINEIGEN(1) ITERATE(25)
                                              /EXTRACTION PC
                                              /CRITERIA ITERATE(25)
                                              /ROTATION VARIMAX
                                              /SAVE REG(ALL)
                                              /METHOD=CORRELATION .
```

Resources	Elapsed Time		0:00:00.52
	Maximum Memory Required	4396 (4.293K) bytes	
Variables Created	FAC1_42	Component score 1	
	FAC2_42	Component score 2	

Correlation Matrix

		attraction to particular clothes	welfare	colour	taste	boldness
Correlation	attraction to particular clothes	1.000	.057	.069	.032	-.013
	welfare	.057	1.000	.416	.286	.129
	colour	.069	.416	1.000	.209	-.028
	taste	.032	.286	.209	1.000	.016
	boldness	-.013	.129	-.028	.016	1.000
Sig. (1-tailed)	attraction to particular clothes		.163	.116	.287	.414
	welfare	.163		.000	.000	.012
	colour	.116	.000		.000	.313
	taste	.287	.000	.000		.388
	boldness	.414	.012	.313	.388	

KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.571
Bartlett's Test of Sphericity	Approx. Chi-Square	94.907
	df	10
	Sig.	.000

Communalities

	Initial	Extraction
attraction to particular clothes	1.000	.272
welfare	1.000	.670
colour	1.000	.583
taste	1.000	.382
boldness	1.000	.763

Extraction Method: Principal Component Analysis.

Total Variance Explained

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	1.638	32.754	32.754	1.638	32.754	32.754	1.637	32.747	32.747
2	1.033	20.655	53.409	1.033	20.655	53.409	1.033	20.662	53.409
3	.975	19.500	72.910						
4	.809	16.187	89.096						
5	.545	10.904	100.000						

Extraction Method: Principal Component Analysis.

Component Matrix(a)

	Component	
	1	2
attraction to particular clothes	.181	-.490
welfare	.807	.134
colour	.742	-.178
taste	.618	-.018
boldness	.143	.862

Extraction Method: Principal Component Analysis.
a 2 components extracted.

Rotated Component Matrix(a)

	Component	
	1	2
attraction to particular clothes	.169	-.494
welfare	.810	.115
colour	.738	-.196
taste	.617	-.032
boldness	.164	.858

Extraction Method: Principal Component Analysis.
       Rotation Method: Varimax with Kaiser Normalisation.
a Rotation converged in 3 iterations.

Component Transformation Matrix

Component	1	2
1	1.000	-.024
2	.024	1.000

Extraction Method: Principal Component Analysis.
       Rotation Method: Varimax with Kaiser Normalisation.

Reliability
Case Processing Summary

		N	%
Cases	Valid	302	94.4
	Excluded(a)	18	5.6
	Total	320	100.0

a Listwise deletion based on all variables in the procedure.

Reliability Statistics

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.338	.399	5

Item Statistics

	Mean	Std. Deviation	N
attraction to particular clothes	2.3874	1.11718	302
welfare	3.6887	.75756	302
colour	3.6291	.70702	302
taste	3.1391	.98183	302
boldness	2.6689	1.01302	302

Inter-Item Correlation Matrix

	attraction to particular clothes	welfare	colour	taste	boldness
attraction to particular clothes	1.000	.057	.069	.032	-.013
welfare	.057	1.000	.416	.286	.129
colour	.069	.416	1.000	.209	-.028
taste	.032	.286	.209	1.000	.016
boldness	-.013	.129	-.028	.016	1.000

The covariance matrix is calculated and used in the analysis.

Inter-Item Covariance Matrix

	attraction to particular clothes	welfare	colour	taste	boldness
attraction to particular clothes	1.248	.048	.054	.036	-.014
welfare	.048	.574	.223	.213	.099
colour	.054	.223	.500	.145	-.020
taste	.036	.213	.145	.964	.016
boldness	-.014	.099	-.020	.016	1.026

The covariance matrix is calculated and used in the analysis.

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Squared Multiple Correlation	Cronbach's Alpha if Item Deleted
attraction to particular clothes	13.1258	4.416	.053	.006	.408
welfare	11.8245	4.172	.377	.234	.139
colour	11.8841	4.608	.265	.190	.230
taste	12.3742	4.129	.205	.092	.252
boldness	12.8444	4.723	.037	.025	.406

Self Actualisation Need:
3rd Iteration
Factor Analysis

Notes

Output Created		17-JUL-2006 00:52:24
Comments		
Input	Data	G:\My PhD\BY COUNTRY\Brazil\Consumers\review 15jul06\R new survey BR Aug-Sep 2004 update 16jul06.sav
	Filter	<none>
	Weight	<none>
	Split File	<none>
	N of Rows in Working Data File	320
Missing Value Handling	Definition of Missing	MISSING=EXCLUDE: User-defined missing values are treated as missing.
	Cases Used	LISTWISE: Statistics are based on cases with no missing values for any variable used.
Syntax		FACTOR
		/VARIABLES a17 a03 a25 a02
		/MISSING LISTWISE /ANALYSIS a17 a03 a25 a02
		/PRINT INITIAL CORRELATION SIG KMO EXTRACTION
		ROTATION
		/CRITERIA MINEIGEN(1) ITERATE(25)
		/EXTRACTION PC
		/CRITERIA ITERATE(25)
		/ROTATION VARIMAX
		/SAVE REG(ALL)
		/METHOD=CORRELATION .
Resources	Elapsed Time	0:00:00.09
	Maximum Memory Required	3096 (3.023K) bytes
Variables Created	FAC1_43	Component score 1
	FAC2_43	Component score 2

Correlation Matrix

		welfare	colour	taste	boldness
Correlation	welfare	1.000	.432	.276	.112
	colour	.432	1.000	.189	-.044
	taste	.276	.189	1.000	.023
	boldness	.112	-.044	.023	1.000
Sig. (1-tailed)	welfare		.000	.000	.024
	colour	.000		.000	.220
	taste	.000	.000		.345
	boldness	.024	.220	.345	

KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.553
Bartlett's Test of Sphericity	Approx. Chi-Square	97.208
	df	6
	Sig.	.000

Communalities

	Initial	Extraction
welfare	1.000	.680
colour	1.000	.627
taste	1.000	.363
boldness	1.000	.966

Extraction Method: Principal Component Analysis.

Total Variance Explained

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	1.615	40.385	40.385	1.615	40.385	40.385	1.610	40.260	40.260
2	1.021	25.528	65.913	1.021	25.528	65.913	1.026	25.653	65.913
3	.832	20.809	86.722						
4	.531	13.278	100.000						

Extraction Method: Principal Component Analysis.

Component Matrix(a)

	Component	
	1	2
welfare	.820	.088
colour	.753	-.246
taste	.602	-.002
boldness	.117	.976

Extraction Method: Principal Component Analysis.
a 2 components extracted.

Rotated Component Matrix(a)

	Component	
	1	2
welfare	.808	.163
colour	.772	-.176
taste	.600	.053
boldness	.027	.983

Extraction Method: Principal Component Analysis.
        Rotation Method: Varimax with Kaiser Normalisation.
a Rotation converged in 3 iterations.

Component Transformation Matrix

Component	1	2
1	.996	.092
2	-.092	.996

Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalisation.

Reliability
Case Processing Summary

		N	%
Cases	Valid	311	97.2
	Excluded(a)	9	2.8
	Total	320	100.0

a Listwise deletion based on all variables in the procedure.

Reliability Statistics

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.397	.441	4

Item Statistics

	Mean	Std. Deviation	N
welfare	3.6849	.76437	311
colour	3.6174	.71722	311
taste	3.1511	.97699	311
boldness	2.6817	1.01200	311

Inter-Item Correlation Matrix

	welfare	colour	taste	boldness
welfare	1.000	.432	.276	.112
colour	.432	1.000	.189	-.044
taste	.276	.189	1.000	.023
boldness	.112	-.044	.023	1.000

The covariance matrix is calculated and used in the analysis.

Inter-Item Covariance Matrix

	welfare	colour	taste	boldness
welfare	.584	.237	.206	.086
colour	.237	.514	.132	-.032
taste	.206	.132	.955	.022
boldness	.086	-.032	.022	1.024

The covariance matrix is calculated and used in the analysis.

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Squared Multiple Correlation	Cronbach's Alpha if Item Deleted
welfare	9.4502	2.739	.419	.242	.135
colour	9.5177	3.192	.263	.201	.296
taste	9.9839	2.706	.224	.082	.323
boldness	10.4534	3.203	.043	.023	.539

Self Actualisation Need:
4th Iteration
Factor Analysis

Notes

Output Created		17-JUL-2006 00:52:58
Comments		
Input	Data	G:\My PhD\BY COUNTRY\Brazil\Consumers\review 15jul06\R new survey BR Aug-Sep 2004 update 16jul06.sav
	Filter	<none>
	Weight	<none>
	Split File	<none>
	N of Rows in Working Data File	320
Missing Value Handling	Definition of Missing	MISSING=EXCLUDE: User-defined missing values are treated as missing.
	Cases Used	LISTWISE: Statistics are based on cases with no missing values for any variable used.
Syntax		FACTOR
		/VARIABLES a17 a03 a25
		/MISSING LISTWISE /ANALYSIS a17 a03 a25
		/PRINT INITIAL CORRELATION SIG KMO EXTRACTION
		ROTATION
		/CRITERIA MINEIGEN(1) ITERATE(25)
		/EXTRACTION PC
		/CRITERIA ITERATE(25)
		/ROTATION VARIMAX
		/SAVE REG(ALL)
		/METHOD=CORRELATION .
Resources	Elapsed Time	0:00:00.17
	Maximum Memory Required	2028 (1.980K) bytes
Variables Created	FAC1_44	Component score 1

Correlation Matrix

		welfare	colour	taste
Correlation	welfare	1.000	.434	.271
	colour	.434	1.000	.185
	taste	.271	.185	1.000
Sig. (1-tailed)	welfare		.000	.000
	colour	.000		.000
	taste	.000	.000	

KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.577
Bartlett's Test of Sphericity	Approx. Chi-Square	91.352
	df	3
	Sig.	.000

Communalities

	Initial	Extraction
welfare	1.000	.664
colour	1.000	.586
taste	1.000	.357

Extraction Method: Principal Component Analysis.

Total Variance Explained

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	1.607	53.569	53.569	1.607	53.569	53.569
2	.839	27.958	81.527			
3	.554	18.473	100.000			

Extraction Method: Principal Component Analysis.

Component Matrix(a)

	Component
	1
welfare	.815
colour	.765
taste	.598

Extraction Method: Principal Component Analysis.
a 1 components extracted.

Rotated Component Matrix(a)

a Only one component was extracted. The solution cannot be rotated.

Reliability
Case Processing Summary

		N	%
Cases	Valid	316	98.8
	Excluded(a)	4	1.3
	Total	320	100.0

a Listwise deletion based on all variables in the procedure.

Reliability Statistics

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.535	.559	3

Item Statistics

	Mean	Std. Deviation	N
welfare	3.6899	.75930	316
colour	3.6234	.71311	316
taste	3.1487	.97916	316

Inter-Item Correlation Matrix

	welfare	colour	taste
welfare	1.000	.434	.271
colour	.434	1.000	.185
taste	.271	.185	1.000

The covariance matrix is calculated and used in the analysis.

Inter-Item Covariance Matrix

	welfare	colour	taste
welfare	.577	.235	.202
colour	.235	.509	.129
taste	.202	.129	.959

The covariance matrix is calculated and used in the analysis.

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Squared Multiple Correlation	Cronbach's Alpha if Item Deleted
welfare	6.7722	1.726	.438	.227	.299
colour	6.8386	1.939	.367	.194	.416
taste	7.3133	1.556	.271	.079	.605

F3 Sample Syntax Sheet – Cross Tabs (SPSS)
(Cross Tabs between Consumer Independent Variables and PIL Model within the British consumer sample)

```
CROSSTABS
 /TABLES= PhysicalScale IdentityScale LifestyleScale
BY rb04 rb05 rb06 rb09fema rb09male rb10fema rb10male rb14
 /FORMAT= AVALUE TABLES
 /STATISTIC=CORR GAMMA
 /CELLS= COUNT COLUMN
 /COUNT ROUND CELL .

NPAR TESTS
 /K-W= PhysicalScale IdentityScale LifestyleScale BY rB02(1 4)
 /MISSING ANALYSIS.

NPAR TESTS
 /K-W=  PhysicalScale IdentityScale LifestyleScale   BY rB03(1 2)
 /MISSING ANALYSIS.

NPAR TESTS
 /M-W= PhysicalScale IdentityScale LifestyleScale BY B08(1 2)
 /MISSING ANALYSIS.

NPAR TESTS
 /K-W= PhysicalScale IdentityScale LifestyleScale BY b15a(1 4)
 /MISSING ANALYSIS.

NPAR TESTS
 /K-W= PhysicalScale IdentityScale LifestyleScale BY b15b(1 3)
 /MISSING ANALYSIS.
```

F4 Sample Output Sheet – Cross Tabs (SPSS)
(Cross Tabs between Consumer Independent Variables and PIL Model within the British consumer sample)

Crosstabs

R Physical PIL * age range recoded
Crosstab

			age range recoded						Total
			15-19 years old	20-24 years old	25-29 years old	30-39 years old	40-49 years old	50 years old +	
R Physical PIL	not important	Count	3	2	0	2	2	0	9
		% within age range recoded	5.3%	2.8%	.0%	7.7%	6.7%	.0%	3.5%
	less important	Count	5	6	2	2	1	2	18
		% within age range recoded	8.8%	8.5%	5.6%	7.7%	3.3%	5.7%	7.1%
	important	Count	20	19	8	6	4	7	64
		% within age range recoded	35.1%	26.8%	22.2%	23.1%	13.3%	20.0%	25.1%
	very important	Count	25	30	25	11	17	20	128
		% within age range recoded	43.9%	42.3%	69.4%	42.3%	56.7%	57.1%	50.2%
	super important	Count	4	14	1	5	6	6	36
		% within age range recoded	7.0%	19.7%	2.8%	19.2%	20.0%	17.1%	14.1%
Total		Count	57	71	36	26	30	35	255
		% within age range recoded	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Symmetric Measures

		Value	Asymp. Std. Error(a)	Approx. T(b)	Approx. Sig.
Ordinal by Ordinal	Gamma	.182	.069	2.644	.008
	Spearman Correlation	.162	.061	2.618	.009(c)
Interval by Interval	Pearson's R	.140	.060	2.242	.026(c)
N of Valid Cases		255			

a Not assuming the null hypothesis.
b Using the asymptotic standard error assuming the null hypothesis.
c Based on normal approximation.

R Identity PIL * age range recoded
Crosstab

			age range recoded						Total
			15-19 years old	20-24 years old	25-29 years old	30-39 years old	40-49 years old	50 years old +	
R Identity PIL	not important	Count	0	2	0	2	1	2	7
		% within age range recoded	.0%	2.8%	.0%	6.7%	3.3%	5.9%	2.7%
	less important	Count	2	3	4	5	3	5	22
		% within age range recoded	3.5%	4.2%	11.1%	16.7%	10.0%	14.7%	8.5%
	important	Count	12	17	10	10	4	15	68
		% within age range recoded	21.1%	23.9%	27.8%	33.3%	13.3%	44.1%	26.4%
	very important	Count	28	34	13	10	10	7	102
		% within age range recoded	49.1%	47.9%	36.1%	33.3%	33.3%	20.6%	39.5%
	super important	Count	15	15	9	3	12	5	59
		% within age range recoded	26.3%	21.1%	25.0%	10.0%	40.0%	14.7%	22.9%
Total		Count	57	71	36	30	30	34	258
		% within age range recoded	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Symmetric Measures

		Value	Asymp. Std. Error(a)	Approx. T(b)	Approx. Sig.
Ordinal by Ordinal	Gamma	-.193	.065	-2.931	.003
	Spearman Correlation	-.182	.062	-2.962	.003(c)
Interval by Interval	Pearson's R	-.193	.061	-3.148	.002(c)
N of Valid Cases		258			

a Not assuming the null hypothesis.
b Using the asymptotic standard error assuming the null hypothesis.
c Based on normal approximation.

R Identity PIL * body mass index range
Crosstab

			body mass index range					Total
			underweight	normal weight	overweight	obese	very obese	
R Identity PIL	not important	Count	1	3	1	1	0	6
		% within body mass index range	5.3%	2.2%	3.4%	8.3%	.0%	3.0%
	less important	Count	0	11	4	2	0	17
		% within body mass index range	.0%	8.0%	13.8%	16.7%	.0%	8.6%
	important	Count	2	41	8	4	0	55
		% within body mass index range	10.5%	29.9%	27.6%	33.3%	.0%	27.8%
	very important	Count	7	56	12	2	0	77
		% within body mass index range	36.8%	40.9%	41.4%	16.7%	.0%	38.9%
	super important	Count	9	26	4	3	1	43
		% within body mass index range	47.4%	19.0%	13.8%	25.0%	100.0%	21.7%
Total		Count	19	137	29	12	1	198
		% within body mass index range	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Symmetric Measures

		Value	Asymp. Std. Error(a)	Approx. T(b)	Approx. Sig.
Ordinal by Ordinal	Gamma	-.251	.109	-2.232	.026
	Spearman Correlation	-.170	.075	-2.410	.017(c)
Interval by Interval	Pearson's R	-.143	.083	-2.028	.044(c)
N of Valid Cases		198			

a Not assuming the null hypothesis.
b Using the asymptotic standard error assuming the null hypothesis.
c Based on normal approximation.

R Lifestyle PIL * age range recoded
Crosstab

			age range recoded						Total
			15-19 years old	20-24 years old	25-29 years old	30-39 years old	40-49 years old	50 years old +	
R Lifestyle PIL	not important	Count	5	9	6	8	11	8	47
		% within age range recoded	8.9%	12.5%	17.1%	26.7%	36.7%	23.5%	18.3%
	less important	Count	19	18	7	12	6	15	77
		% within age range recoded	33.9%	25.0%	20.0%	40.0%	20.0%	44.1%	30.0%
	important	Count	19	26	13	9	8	8	83
		% within age range recoded	33.9%	36.1%	37.1%	30.0%	26.7%	23.5%	32.3%
	very important	Count	12	14	8	1	5	1	41
		% within age range recoded	21.4%	19.4%	22.9%	3.3%	16.7%	2.9%	16.0%
	super important	Count	1	5	1	0	0	2	9
		% within age range recoded	1.8%	6.9%	2.9%	.0%	.0%	5.9%	3.5%
Total		Count	56	72	35	30	30	34	257
		% within age range recoded	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Symmetric Measures

		Value	Asymp. Std. Error(a)	Approx. T(b)	Approx. Sig.
Ordinal by Ordinal	Gamma	-.226	.060	-3.740	.000
	Spearman Correlation	-.220	.058	-3.608	.000(c)
Interval by Interval	Pearson's R	-.225	.059	-3.683	.000(c)
N of Valid Cases		257			

a Not assuming the null hypothesis.
b Using the asymptotic standard error assuming the null hypothesis.
c Based on normal approximation.

R Lifestyle PIL * height female recoded
Crosstab

			height female recoded							Total
			up to 5ft 2"	5ft 2" to 5ft 4"	5ft 4" to 5ft 6"	5ft 6" to 5ft 8"	5ft 8" - 5ft 10"	5ft 10" - 6ft 0"	6ft 0" +	
R Lifestyle PIL	not important	Count	4	1	3	10	4	2	0	24
		% within height female recoded	12.5%	5.3%	9.7%	29.4%	25.0%	16.7%	.0%	16.4%
	less important	Count	10	5	11	12	4	5	2	49
		% within height female recoded	31.3%	26.3%	35.5%	35.3%	25.0%	41.7%	100.0%	33.6%
	important	Count	11	10	13	7	7	3	0	51
		% within height female recoded	34.4%	52.6%	41.9%	20.6%	43.8%	25.0%	.0%	34.9%
	very important	Count	5	3	4	2	1	1	0	16
		% within height female recoded	15.6%	15.8%	12.9%	5.9%	6.3%	8.3%	.0%	11.0%
	super important	Count	2	0	0	3	0	1	0	6
		% within height female recoded	6.3%	.0%	.0%	8.8%	.0%	8.3%	.0%	4.1%
Total		Count	32	19	31	34	16	12	2	146
		% within height female recoded	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Symmetric Measures

		Value	Asymp. Std. Error(a)	Approx. T(b)	Approx. Sig.
Ordinal by Ordinal	Gamma	-.189	.086	-2.181	.029
	Spearman Correlation	-.178	.081	-2.166	.032(c)
Interval by Interval	Pearson's R	-.155	.082	-1.880	.062(c)
N of Valid Cases		146			

a Not assuming the null hypothesis.
b Using the asymptotic standard error assuming the null hypothesis.
c Based on normal approximation.

R Lifestyle PIL * weight female recoded
Crosstab

			weight female recoded							Total
			up to 8 st	8st to 9st	9st to 10st	10st to 11st	11st to 12st	12st to 13st	13st +	
R Lifestyle PIL	not important	Count	3	2	5	6	3	1	1	21
		% within weight female recoded	9.7%	7.4%	15.2%	42.9%	37.5%	100.0%	20.0%	17.6%
	less important	Count	9	13	13	3	1	0	1	40
		% within weight female recoded	29.0%	48.1%	39.4%	21.4%	12.5%	.0%	20.0%	33.6%
	important	Count	12	7	12	4	3	0	1	39
		% within weight female recoded	38.7%	25.9%	36.4%	28.6%	37.5%	.0%	20.0%	32.8%
	very important	Count	5	4	2	1	1	0	1	14
		% within weight female recoded	16.1%	14.8%	6.1%	7.1%	12.5%	.0%	20.0%	11.8%
	super important	Count	2	1	1	0	0	0	1	5
		% within weight female recoded	6.5%	3.7%	3.0%	.0%	.0%	.0%	20.0%	4.2%
Total		Count	31	27	33	14	8	1	5	119
		% within weight female recoded	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Symmetric Measures

		Value	Asymp. Std. Error(a)	Approx. T(b)	Approx. Sig.
Ordinal by Ordinal	Gamma	-.213	.105	-2.007	.045
	Spearman Correlation	-.193	.096	-2.125	.036(c)
Interval by Interval	Pearson's R	-.141	.111	-1.535	.127(c)
N of Valid Cases		119			

a Not assuming the null hypothesis.
b Using the asymptotic standard error assuming the null hypothesis.
c Based on normal approximation.

R Lifestyle PIL * body mass index range
Crosstab

			body mass index range					Total
			underweight	normal weight	overweight	obese	very obese	
R Lifestyle PIL	not important	Count	1	25	12	3	0	41
		% within body mass index range	5.9%	17.9%	41.4%	27.3%	.0%	20.7%
	less important	Count	8	38	9	3	0	58
		% within body mass index range	47.1%	27.1%	31.0%	27.3%	.0%	29.3%
	important	Count	3	51	6	1	1	62
		% within body mass index range	17.6%	36.4%	20.7%	9.1%	100.0%	31.3%
	very important	Count	3	21	2	3	0	29
		% within body mass index range	17.6%	15.0%	6.9%	27.3%	.0%	14.6%
	super important	Count	2	5	0	1	0	8
		% within body mass index range	11.8%	3.6%	.0%	9.1%	.0%	4.0%
Total		Count	17	140	29	11	1	198
		% within body mass index range	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Symmetric Measures

		Value	Asymp. Std. Error(a)	Approx. T(b)	Approx. Sig.
Ordinal by Ordinal	Gamma	-.237	.105	-2.209	.027
	Spearman Correlation	-.164	.073	-2.324	.021(c)
Interval by Interval	Pearson's R	-.123	.078	-1.741	.083(c)
N of Valid Cases		198			

a Not assuming the null hypothesis.
b Using the asymptotic standard error assuming the null hypothesis.
c Based on normal approximation.

NPar Tests
Kruskal-Wallis Test
Ranks

	religion recoded	N	Mean Rank
R Lifestyle PIL	No Religion	109	128.51
	Christian Protestant	82	106.90
	Other Christian	35	138.16
	Other Religion	22	148.52
	Total	248	

Test Statistics(a,b)

	R Lifestyle PIL
Chi-Square	9.713
df	3
Asymp. Sig.	.021

a Kruskal Wallis Test
b Grouping Variable: religion recoded

Kruskal-Wallis Test
Ranks

	ethnicity recoded	N	Mean Rank
R Lifestyle PIL	White	198	120.58
	Other	56	151.98
	Total	254	

Test Statistics(a,b)

	R Lifestyle PIL
Chi-Square	8.575
df	1
Asymp. Sig.	.003

a Kruskal Wallis Test
b Grouping Variable: ethnicity recoded

Mann-Whitney Test
Ranks

	gender	N	Mean Rank	Sum of Ranks
R Physical PIL	Female	163	136.12	22187.00
	Male	92	113.62	10453.00
	Total	255		
R Identity PIL	Female	164	146.39	24008.50
	Male	94	100.03	9402.50
	Total	258		

Test Statistics(a)

	R Physical PIL	R Identity PIL
Mann-Whitney U	6175.000	4937.500
Wilcoxon W	10453.000	9402.500
Z	-2.530	-5.042
Asymp. Sig. (2-tailed)	.011	.000

a Grouping Variable: gender

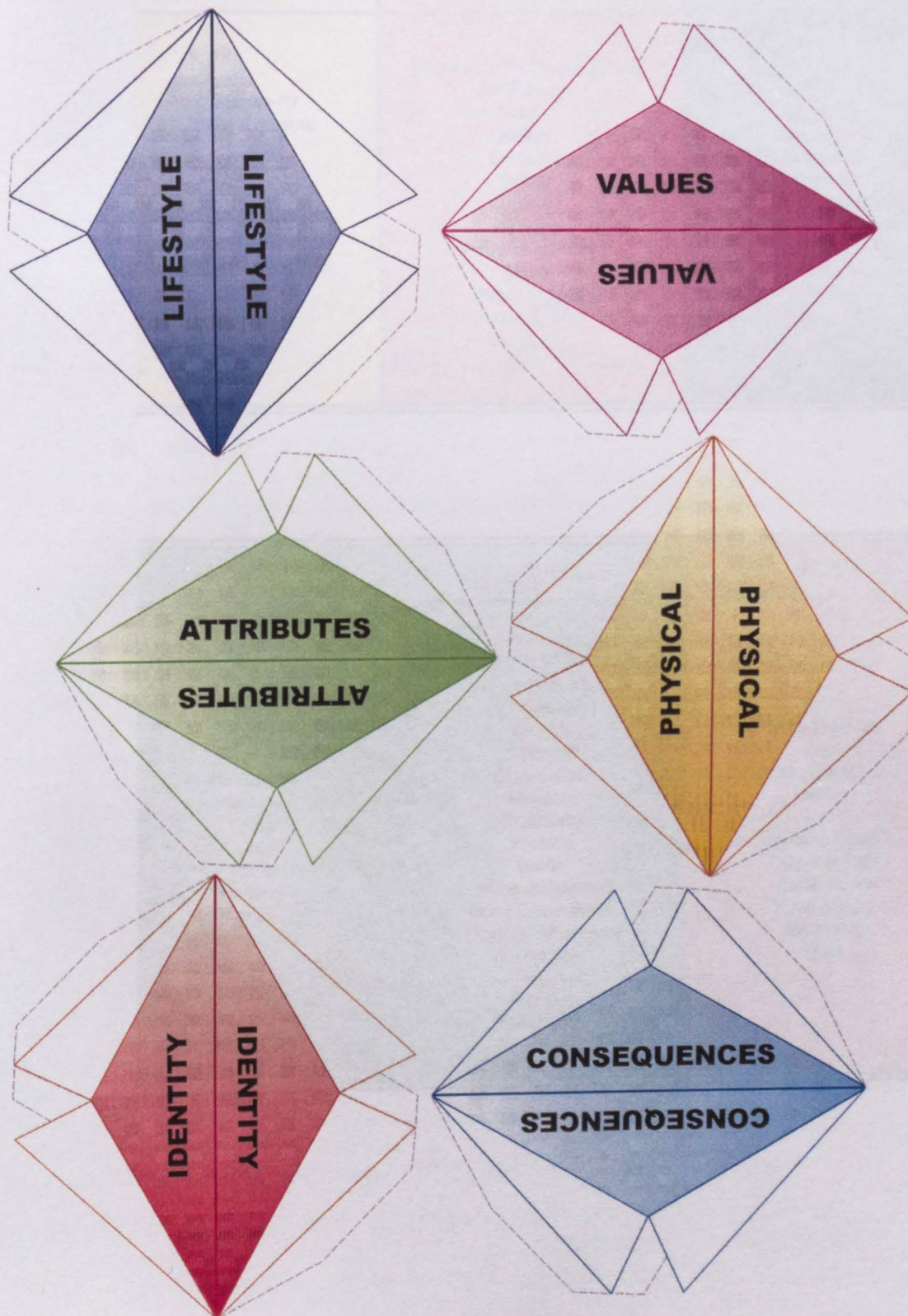# F 5 Digital Appendix (Multivariate Statistics Procedures)

CD-ROM (Windows/Word)

SEE BACK COVER

F 5 DIY Fashion Polyhedron

Do It Yourself

PHYSICAL	IDENTITY	LIFESTYLE
Balance-Fit Body Exposure Climate Comfort Fabric Functionality Health Physical Adequacy Seasonality	Attraction to Particular Clothes Be Noticed Beauty Beliefs Boldness Colour Elegance Ideology Image Judgement Mood Personal Style Racial Roots Sensuality Taste	Age Appearance Brand Celebrity Influence Durability Ease-of-Care Exclusivity Fashion Moral Conventions Opposite Gender Price Profession Quality Same Gender Versatility Welfare

ATTRIBUTES	CONSEQUENCES	VALUES
Balance-Fit Beauty Colour Comfort Fabric Functionality Price	Age Appearance Attraction to Particular Clothes Be Noticed Boldness Climate Durability Ease-of-Care Elegance Exclusivity Fashion Health Image Judgement Moral Conventions Physical Adequacy Profession Quality Seasonality Versatility Welfare	Beliefs Body Exposure Brand Celebrity Influence Ideology Mood Opposite Gender Personal Style Racial Roots Same Gender Sensuality Taste

G - OUTSOURCED SUBMISSIONS

G1 Papers in Conferences

A MEANS-END CHAIN MODEL APPROACH FOR FASHION PRODUCT DEVELOPMENT
2006 Design Research Society International Conference – Lisbon, 1 - 5 November 2006
(Accepted for presentation and publication in the Proceedings)

INVESTIGATION INTO THE EMOTION AND PLEASURE DETERMINANTS WITHIN
FASHION DESIGN CONSUMPTION
Design & Emotion 2006 Conference - Gothenburg, Sweden - 27-29 September 2006
(Abstract accepted, full paper accepted with corrections, but attendance withdrawn due the last
stages before thesis submission)

A REFLECTION OF THE EXCLUDING FASHION DESIGN EDUCATION PROJECTS
2006 Engineering and Product Design Education International Conference – Salzburg, Austria - 7
and 8 September 2006
(Full paper accepted but attendance withdrawn due the last stages before thesis submission)

METHODOLOGY FOR CONSUMER PREFERENCES SUPPORT WITHIN NEW FASHION
CLOTHING PRODUCT DEVELOPMENT
7° P&D Design Conference- Curitiba, Brazil - 7-9 August 2006
(Abstract accepted, full paper accepted, attendance withdrawn due the last stages before thesis
submission)

INVESTIGAÇÃO DO COMPORTAMENTO DO CONSUMIDOR COMO UMA FERRAMENTA
ESTRATÉGICA DE DESIGN PARA UMA INDUSTRIA DE MODA-VESTUÁRIO
COMPETITIVA
XXII Congresso Nacional de Técnico Têxteis – Recife, Brazil – 25-30 July de 2006
(Paper accepted but attendance withdrawn due the last stages before thesis submission)

CULTURAL AND PHYSICAL DIFFERENCES IN DESIRABLE FASHION CLOTHING
PRODUCTS
Research into Practice 2006 Conference - Hatfield, UK - 7 and 8 July 2006
(Paper accepted but attendance withdrawn due the last stages before thesis submission)

THE BODY SHAPE PERSPECTIVE IN NEW FASHION PRODUCT DEVELOPMENT
3rd International Conference on Design Research – ANPED – Associação Nacional de Pesquisa em
Design,
Rio de Janeiro, Brazil, 12-15 October 2005
(full paper published in Proceedings and presented in Oral Session)

ANALYSING PLEASURABILITY IN FASHION CONSUMPTION
International Symposium on Fashion Marketing and Management Research; London College of
Fashion,
London, UK, 27 June 2005
(full paper accepted for publication in Proceedings and presented in Oral Session)

UNDERSTANDING CONSUMER PREFERENCES IN FASHION
Cumulus Pride & PreDesign – IADE-PT, Lisbon: 26-29 May 2005
(full paper published in Proceedings and presented in Oral Session)

CONSUMER NEEDS AS A CORE ASPECT WITHIN FASHION PRODUCT DESIGN
Include 2005 Conference – Royal College of Art, London. 5-8 April 2005
(full paper published in Proceedings and presented in Poster Session)

SIMILARITIES AND DIFFERENCES BETWEEN BRITISH AND BRAZILIAN CONSUMERS'
PREFERENCES IN FASHION PRODUCTS
1st ABEP/Oxford Centre for Brazilian Studies Conference. Oxford University, UK: 14 March 2004
(2 abstracts published in Proceedings, 1 Oral presentation and 1 Poster presentation)

G2 Papers in Books (Chapter)

STUDY OF CONSUMER NEEDS AS A STRATEGIC DESIGN TOOL FOR A COMPETITIVE
FASHION INDUSTRY
1o. Encontro Internacional de Estudantes e Pesquisadores Brasileiros no Exterior - UNESCO/Paris,
France
(Full paper submitted, waiting review notification)

G 3 Papers in Journals

ROCHA, M. A. V.; HAMMOND, L. & HAWKINS, D. (2005) Age, Gender and National Factors
in Fashion Consumption. Journal of Fashion Marketing and Management – Special Issue on
Demographic change and the fashion market – UK: Emerald: volume 9.4, 2005. ISBN 1-84544-
799-9; ISSN 1361-2026.

Age, gender and national factors in fashion consumption

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Abstract

Purpose – The research aimed to reveal real behavioural preferences in fashion and clothing consumption, and analyses the similarities and differences between British, Brazilian and Chinese consumers. This approach was selected to consider the distinctions between a mature market, and emerging western and eastern markets.

Design/methodology/approach – The investigation was based around a research methodology using quantitative analysis with appropriate statistical techniques on three random surveys of consumers from the southeast of England ($N = 265$), the northeast of Brazil ($N = 310$) and mainland China ($N = 226$) older than 15 years.

Findings – A new conceptual framework is proposed – the physical, identity and lifestyle (PIL) model, providing a tool for effective and more focused decision-making techniques for developing better fashion products. British, Brazilian and Chinese consumers have different requirements for fashion and clothing products based upon age and gender. The evidence suggests that the fashion industry needs to be more aware of consumer indicators when targeting mature consumers.

Research limitations/implications – The research was based on samples and not the entire population of target consumers, providing limitations. As an inferential statistical method was chosen, the results were susceptible to inaccuracy.

Originality/value – The survey came from three different continents, thereby providing rich perspectives into global consumption. Companies who own domestic market share and want to enter new global markets could use this data to improve their product design development decisions.

Keywords Fashion, Age groups, Consumer behaviour, United Kingdom, Brazil, China

Paper type Research paper

Introduction

The fashion industry and the grey market

Globally the fashion industry is at the forefront of emerging industries. Even in mature European markets, the approach of using trend forecasting and the emphasis on short

product lifecycles allows for continuous growth and development within the industry. The consumer's appetite for variety has lead to increased rates of product introduction, product proliferation and shortened product cycles (Abernathy *et al.*, 1999). This means that companies have to respond much faster to rapidly changing markets; however this hinders universal interpretations.

The conceptual approach of this paper considers the fashion and clothing industry as a single entity, as consumers do not differentiate between these separate industrial concepts. The fashion product is composed of three key strands: ergonomics, trends and subjectivity. This project used a multidisciplinary approach towards research and analysis, and explored how companies and design teams should consider the product lifecycle, and market requirements linked to changing consumer behaviour.

Design research, as a scientific field has to consider a variety of issues: the environmental impact and consequences, the search for sustainability, the interconnectivity between economic and cultural globalisation and the increased exchange between potential conflicts in accumulated information. Using a more scientific approach, the research aims to reveal real behavioural preferences for fashion and clothing consumption choices in an ageing society.

The ageing baby boomers, as a new group of consumers, have already changed our attitudes towards ageing and challenged the traditional stereotype of older people. They want to be physically active as well as psychologically young. It is known that older people have limited product choices in the fashion market place. A research study into older female consumers in Finland conducted by Iltanen (2003) stated, "middle-aged women often complain that they cannot find clothes that would please them. They say that their body has changed and fashion designers seem to ignore that. If the clothes fit the ageing body the style is not right, but seems to be designed for an older generation".

Despite the increase in disposable income and leisure time of this segment of the population, there is still limited market response to their needs (Li, 2003). In research conducted by Li (2003) with the female grey market, there was a high demand in garments for quality, comfort, function and aesthetic elements – ironically, some of these characteristics are commonly linked to the youth market. "There is a need for developing a new business theory to cater for the entirely different older people that we have seen emerge in the last decade. That means the basic structure of designing, manufacturing and retailing has to change" (Li, 2003).

Research involving older consumers indicates that they are highly demanding in terms of the fashion product attributes (Li, 2003; Zhang *et al.*, 2002). Research also indicates that fashion designers need to become more aware of the ageing population's psychological need to express their individual style and taste through a choice of better quality products. Iltanen (2005) research explored this relationship between the fashion ability and stereotypical views that designers have in relation to older consumer taste. In the study designers described garments for the grey female market in Finland as having to cover the body with high necklines, long sleeves, longish tops and everything has to be loose fitting. All the materials were soft, often elastic and neutral colours. Elderly consumers felt disappointed to discover that women of their kind were not a target group for the stylish designers.

382

Conceptual framework

Three core variables: physical, identity, and lifestyle (PIL), have been selected and used to analyse consumer preferences in relation to age, gender and nationality. Table I outlines the indicators within each of these three variables.

The model takes into account the physical variables that affect old age. This indicates the primary role of ergonomics and body shapes as an important factor in developing products for older consumers. The physical change and deterioration of the body shape has to be addressed to ensure that the garments have appropriate fit and features to improve the quality of the products. Physical variables do change with age.

The model takes into account identity as an important factor when developing products for older consumers that have strong fashionability. Other models that consider identity variables normally have a clothing perspective that stress the functional attributes not fashion attributes. The identity variable has been used because of the need for fashion products to be stylish, as identity does not seem to change with age.

The model takes into account the lifestyle aspirations of older consumers. It provides new insights into the complexities of the new older consumer that is addressing the body/mind relationship. The variables identified under this category will simplify consumer needs indicators. The lifestyle variable has been used because it relates to the social environment that affects older consumers, as lifestyle does seem have an impact with age.

The PIL model is defined as a business conceptual tool that provides better-targeted fashion and clothing consumption preferences. The new older consumer does not lose their young minded attitudes, but their social values change towards using and wearing fashion products. They do not accept the attitudes of previous generations

PIL model		
Physical	Identity	Lifestyle
Health	Mood[a]	Exclusivity
Comfort	Colour	Fashion
Fabric	Boldness	Easy of care
Body shape	Taste	Profession
Balance/Fit	Sensuality	Durability
Body exposure	Beauty	Opposite gender
Climate	Attraction to particular clothes	Same gender
Functionality	Detachment	Moral conventions
Image judgement[a]	Personal style	Welfare
Seasonality[a]	Elegance	Quality
	Celebrity influence[a]	Versatility
		Brand
		Price
		Age appearance
		Ethnicity[a]
		Religion[a]
		Ideology[a]

Table I.
The proposed PIL model
and the indicators for
fashion and clothing
consumption

Note: [a]Not Rocha (1999) indicators, but added due the qualitative analysis held within the UK survey

towards aging identities and want to remain fashionable. Extensive research has been undertaken that explores ergonomic considerations for developing clothing products for older consumers but do not address identity and lifestyle dimensions (Iltanen, 2003; 2005; Benktzon *et al.*, 2003; Li, 2003).

However the PIL model has been developed to provide a holistic set of dimensions that need to be considered when producing stylish products for older consumers. It attempts to provide insights into consumer preferences and helps the cross-functional team analyse their choices better. The impact of these variables has been mapped with age, gender and nationality in the following section.

The content of the PIL model
Other models consider functionality, ergonomics, and aesthetic factors as separate issues, and provide limited overviews that link these psychological, social and cultural dimensions to fashion product development for the grey market (Lamb and Kallal, 1992; Benktzon *et al.*, 2003). The objective of the PIL model is to provide product development teams with a tool that facilitates effective and more focused decision-making techniques for developing better fashion products.

The indicators for fashion and clothing consumption
Previous studies by the researcher (Rocha, 1999) into fashion and clothing consumption revealed 28 indicators that influence consumer choices in Brazil. These indicators were derived from qualitative and quantitative research carried out using a sample of 380 Brazilians and subsequently a further sample of more 820 Brazilians from four cities. A follow up study among UK consumers extended the indicators to 38. These consumer studies have provided the insights and evidence to build the conceptual framework for this next stage of research.

Research methodology
The research study is a comparative analysis of younger and older people's preferences when choosing fashion products. The research aims to reveal real behavioural preferences for fashion and clothing consumption choices in an ageing society; and analyse the similarities and differences between British, Brazilian and Chinese consumer preferences in fashion consumption. This approach was selected to consider the differences between a mature market and emerging western and eastern markets. The investigation was based on a quantitative approach with a statistical analysis of three random surveys of consumers older than 15 years. The intention was to identify the relationships between fashion and clothing consumption choice indicators based on theories and consumer age and gender.

Sample size
The research study investigated consumer behaviour based on two key variables, age and gender in British, Brazilian and Chinese Markets. The data collection methodology respected the significant co-efficient $P \leq 0.05$. Over 800 people participated in the survey, using modified Likert scale statements to measure the degree of importance attached to fashion consumption choices. The questionnaires were distributed through South East England, North East Brazil and Mainland China. The data collection took place between May 2004 and December 2004.

When considering the consumer point of view, the approaches traditionally used by designers seem to them be the most effective in their search for customer satisfaction. Designers have user-based knowledge and attitudes. This approach also makes the relation between companies and consumers more human led.

Great Britain is a traditional country with a long historical background (compared to Brazil) and an acknowledged role around the world. Its Empire, until the last century, enabled the English influence to penetrate different societies. As a consequence of its old colonies, the United Kingdom nowadays has a multicultural society incorporating a wide variety of different backgrounds (Census, 2001). The boldness of young British designers determines its avant-garde position in the fashion world.

Brazil is a comparatively young country in South America. The Brazilian cultural roots come from Portugal, influenced by other European societies, as well as Africa and indigenous peoples. After World War II North America became the foreign reference guide for Brazilian people (Caldas and Alcadipani, 2003). Some recent changes in internal politics and the recognition of Brazilian multi culture abroad seems to have reinforced the creation of a Brazilian style, but it is acknowledged that its society has a long way to go in trying to minimize the foreign influence in its own consciousness. In recent years, the Brazilian fashion industry has nurtured new professionals, exported burgeoning talents, and consolidated its design and textile industries.

China as a consumer target is the largest market to which any company would like to offer products. The last decades have seen the rise of a middle class society and a massive interest in western products. However, inside China, there are currently many distinct groups of consumers that are geographically spread over this densely populated country. Cui and Liu (2000) suggest that consumers from different regions in mainland China have a diversity of attitudes, lifestyles and consumption patterns.

Data collection method
The surveys
A random survey of 265 consumers from the southeast of England (UK-2004 database) took place in May and June 2004, 310 questionnaires were completed in the northeast of Brazil (BR-2004 database) during August and September 2004 and 226 Chinese consumers were involved in this field research during November and December 2004.Questionnaires were distributed through educational institution staff and alumni in the UK, using voluntary participants who circulated them through their personal network, considering the profiles of age and gender given by the researchers who took in account the census reports. The same procedure was adopted via Brazilian and Chinese institutions, also using volunteer investigators.

All consumers were older than 15 years on the assumption that they had some income and could choose without parental interference. The samples constituted both genders. The nature of the samples was no way selective and all consumers were welcome. The year of birth of all consumers was asked as a first condition of participation in the sample. Respondents were not required to provide proof or evidence related to their answers. A classification of the consumers' profiles took place using the socio-cultural-economic information given by them.

The instrument

The questionnaire incorporated two sections: the first one considered consumer thoughts about clothing and fashion (indicators for consumption), and the second one personal information such as their social (education, income, age, ethnicity, religion, and profession) and physical (garment size, height and weight) profiles. The 31 indicators found in the qualitative research guided the construction of the statements. Some qualitative data arose from the UK-2004 database and a further seven indicators were added to the Brazilian and Chinese questionnaires on aspects such as: mood, celebrity influence, ethnicity, religion, image judgement, ideology and seasonality. This decision to extend the number of indicators was made to turn the analysis, originally made from a national perspective (Rocha, 1999) into one with a global perspective.

It was decided to use a value scale with four options to classify consumers' answers (totally agree, partially agree, partially disagree and totally disagree). A database framework was created using SPSS software.

Statistical framework procedures

The first step was to classify the information collected as independent and dependent variables. The independent variables are ones that cannot have their nature altered by the issue under study, e.g. body shape. The dependent variables, in this case, the indicators for clothing and fashion consumption, are the ones that are expected to vary in this research.

The second task, using factor analysis, was to group indicators into categories related to theories. The method adopted was the Varimax orthogonal rotation. Cronbach's alpha test was used to ensure the reliability of the results.

The third stage was to decide the most appropriate way to measure relationships between independent and dependent variables using statistical methods. Because of the use of the Likert scale, all dependent variables were presented as ordinals. When both independent and dependent variables were ordinals, the gamma coefficient (g) was calculated. As the independent variable gender was nominal, the Mann-Whitney test (MW) was used. For all statistical analysis the significance of any correlation considered $P \leq 0.05$.

As an inferential statistical method was chosen, the results were potentially susceptible to some inaccuracy. The probability adopted was of 95 per cent and the estimated error was four per cent for the size of the sample.

Age, gender and national factors

Age, gender and nationality factors have been used to illustrate the physical, identity and lifestyle (PIL) variables and their relationship to consumption behaviour of older consumers. The choice of these factors age, gender and nationality has been determined by the fact that they are related to the consumer not the product. The judgement of the consumer is represented by the indicators, which form the PIL model. The age factor has a high impact on physical attributes especially with the changes in body performance and shape. The nationality factor has high impact on identity attributes because of social and cultural values that inform the self. The gender factor has high impact on lifestyle attributes because females and males have different expectations of fashion products.

Age, gender and national factors

385

A 57

Results and discussion
Description of the samples
United Kingdom. The British sample was composed of 264 consumers, 64 per cent of
them women and 36 per cent men. The age range inside the sample was represented by
22 per cent of 15-19 years old consumers, 28 per cent of 20-24 years old ones, 13.6 per
cent of 25-29 years old, 11.4 per cent of the 30-39 range, 11.3 per cent of 40-49 ones and
13.6 per cent of 50 years old and over.

386

Brazil. The Brazilian sample was composed of 307 valid questionnaires, 69 per cent
of them women and 31 per cent men. The age range inside the sample was represented
by 10.4 per cent of 15-19 years old consumers, 20.2 per cent of 20-24 years old ones, 13
per cent of 25-29 years old, 22.4 per cent of the 30-39 range, 22.5 per cent of 40-49 ones
and 11.4 per cent of 50 years old and over.

China. The Chinese sample was composed of 218 consumers, 63.8 per cent of them
women and 36.4 per cent men. The age range inside the sample was represented by 0.9
per cent of 15-19 years old consumers, 19.3 per cent of 20-24 years old ones, 32.6 per
cent of 25-29 years old, 25.3 per cent of the 30-39 range, 11.9 per cent of 40-49 ones and
10.1 per cent of 49 years old and over.

Factor analysis outcomes by nationality
Factor analysis was used with the intention of reducing the quantity of variables and
considering applying the PIL model for fashion and clothing consumption. Using the
SPSS software, the best possible arrangement for the achievement of the task
considering the variance explained and the reliability of the factor within the UK-2004,
BR-2004 and CN-2004 databases is shown in Table II. In fact, only the indicators
presented in the three samples were considered to the factor analysis reduction.

PIL model by age and nationality
The results in Table III indicated that the physical variables are critically important for
older consumers in the UK only. The reasons that Brazil and China consumer results

	Physical	PIL model Identity	Lifestyle
UK-2004	Functionality	Boldness	Same gender
	Climate	Sensuality	Exclusivity
	Fabric	Beauty	Fashion
	Health	Detachment	Profession
	Fit	Elegance	Quality
			Brand
BR-2004	Functionality	Sensuality	Opposite gender
	Climate	Beauty	Same gender
	Body exposure	Detachment	Exclusivity
	Fit	Elegance	Quality
CN-2004	Climate	Color	Opposite gender
	Fabric	Boldness	Age appearance
	Comfort	Sensuality	Fashion
	Health	Beauty	Welfare
	Fit	Detachment	Price
		Elegance	

Table II.
Factor analysis PIL
model outcomes by
nationality

did not show similar tendency to the UK could be explained probably by the lower age profile of their population. The UK sample appear to be preparing themselves to live longer which is not so apparent within the other countries in this research.

Identity variables are more important for younger consumers in the UK. There is no evidence that identity is any difference by age in Brazilian and Chinese markets. The tradition of fashion innovation in UK society probably can explain this finding. Brazil is still pursuing national identity, and China is still placing higher value on traditional identities.

UK and Brazil younger consumers are more aware of lifestyle variables than older consumers in these two countries. The reasons could be related to strong economic influences in these two western countries on exclusivity, fashion and quality attributes in products. The evidence did not show that China markets differentiate lifestyle by age. The appeal of consumption is recently a new issue in the Chinese society.

PIL model by gender and nationality

The results in Table IV indicated that female consumers are more aware of the physical variables of product attributes than male consumers for UK and Brazil markets. There is equal importance attached to physical attributes by the Chinese consumers. This area needs to have further research undertaken to identify if it is a weak market related to gender, or if there is a large market opportunity for both female and male consumers in China.

| | PIL Model | | | | | |
	Physical		Identity		Lifestyle	
UK-2004	Younger Gamma -0.183	Older $P = 0.006$ $N = 255$	Younger Gamma 0.185	Older $P = 0.003$ $N = 258$	Younger Gamma 0.187	Older $P = 0.003$ $N = 255$
BR-2004	– –	– –	– –	– –	Younger Gamma 0.151	Older $P = 0.009$ $N = 290$
CN-2004	– –	– –	– –	– –	– –	– –

Table III. Cross tabs between PIL model and age by nationality

| | PIL model | | | | | |
	Physical		Identity		Lifestyle	
UK-2004	Female MW U 6110.5	Male $P = 0.008$ $N = 255$	Female MW U 6110.5	Male $P = 0.008$ $N = 255$	– –	– –
BR-2004	Female MW U 6788	Male $P = 0.000$ $N = 296$	– –	– –	Female MW U 6679	Male $P = 0.000$ $N = 289$
CN-2004	– –	– –	Female MW U 4508	Male $P = 0.037$ $N = 214$	Female MW U 4580	Male $P = 0.031$ $N = 217$

Table IV. Cross tabs between PIL model and gender by nationality

388

UK and Chinese females attach more importance to identity variables than male consumers. The results did not show that there was a difference in Brazilian consumers' awareness by gender for identity product attributes. The reasons for this result probably could be explained by the Latin culture, which is linked to sensuality, beauty, detachment and elegance.

Male consumers in Brazilian and Chinese markets attach less importance to lifestyle variables than female consumers. The results did not show that there was a difference in UK consumers' awareness by gender for brand, fashion, and exclusivity, amongst others, that relate to lifestyle product attributes. The reasons for this result probably could be explained by the established equality of gender in UK society.

Conclusions and discussions

Based on the survey results and theoretical comparative literature review, companies need to be aware of the implications of age in fashion consumer choice. There is growing evidence to suggest that older people are more affluent than was typical a generation ago (Johnson and Falkingham, 1992; Hills, 1996). This provides opportunities and challenges for fashion business to focus on the grey market. A report by the DTI explores these issues, and states

> Ageing is a global phenomenon, affecting developed nations and an increasing number of developing countries. Indeed the speed of ageing is considerably faster in several of our major trading partners – countries like Japan, Italy and Germany – than it is in the UK. Many of the effects of the Age Shift will occur surprisingly fast. Already, patterns of consumer demand and the labour market are changing rapidly as the post-war baby boom generation becomes middle aged and is followed by a much smaller younger generation. Other effects will only be fully felt after the 2020s when, for example, there will be very sharp growth in the number of pensioners in Europe (The Age Shift Report, DTI, 1999).

All of these conditions provide important insights into new patterns of consumer demand for fashion companies to respond to. The trend for older consumers to have an increasing influence on the market place shows no signs of slowing down. Being able to identify and communicate product benefits, which appeal to mature consumers, offers new challenges to the industry. Older consumers are more discerning about product attributes and respond to marketing that reflects rather than compromises their key values. Limited research has been undertaken to compare factors that affect why older consumers consume, how they consume, and what they consume, in relation to their age, gender and nationality. This research goes some way to address some of these concerns and begins the process of identifying key factors that need to be considered by fashion retailers, designers, companies and marketers.

The survey data came from three different continents, thereby providing rich perspectives into global consumption. Companies who own domestic market share and want to enter new global markets could use this data to improve their product design development decisions.

Retailers

Retailers must consider the diversity of age groups and changes in global consumers. Older consumers have distinct characteristics that are different from younger people. These differences manifest themselves through a range of choices that relate to their consumption patterns. Retailers need to take into account changing consumer-buying

behaviour that is related to the factors identified in this study. By being aware of product specific attributes and benefits, value will be added and competitive advantage gained over other retailers. Retailers should consider both the diversity of age groups and the continuing changes in those age groups within the three national contexts.

Designers
Designers need to lose preconceived ideas about older consumers, and add value via fashion products that transcend all ages. Vincent (1999) explores these issues of old age and concludes, "old age necessarily creates identity although very few people wish to embrace or choose that identity". His research shows that identity is not merely and simply about consumption, it remains deeply socially embedded; formed, understood and elaborated through social relationships. For older people identity is a changing and unfolding concept and linked to their life history, which requires designers to take into account style, fit and detachment to ensure inclusion in buying clothing. Designers need to remove their stereotypical ideas of older consumers, and add value to fashion products that transcend all ages. "Designers should become aware of the ageing population's psychological need to express their individual style and taste through a choice of better quality products" (Li, 2003).

Marketing
Understanding the mature population from a marketing perspective includes awareness of the lifestyle and identity issues that influence their mindset. In an effort to stay connected with the increased older consumer group, companies need to expand and be inclusive in their marketing and promotional campaigns. More research needs to be focused on the physical variables such as functionality, climate, fabric, health and fit. Marketers should highlight the benefits of fashion products as older consumers consider their clothing consumption in a more strategic manner than younger consumers. The findings could improve marketing opportunities in the form of targeting male and female consumers based on needs and motivation analysis. Understanding mature consumer attitudes and behaviour will improve the guidance for product development and concepts. Communicating the value added benefits of the PIL attributes are of critical importance in achieving the right balance between consumer interest and profit.

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390

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G 4 Sample of an Article for Terra Magazine website

Weekly based Fashion articles at http://terramagazine.terra.com.br/cultura/moda/

Address http://terramagazine.terra.com.br/interna/0,,OI1054187-EI6593,00.html

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Liquid - ações

Quarta, 29 de junho de 2006, 08h23

Maria Alice Rocha

Não importa o hemisfério em que você se encontra, as liquidações estão chegando. Para o hemisfério sul, queima de inverno, para o norte, remarcação de verão.

» Veja fotos de liquidação na Inglaterra ◘

Pelo menos na Europa, queima de estoque quer dizer quase que literalmente queima de estoque. Os preços despencam sem pena do lojista, que sabe que a cada ano os consumidores esperam essa época para satisfazer seus desejos.

Pesquisas apontam que na Inglaterra, depois do Natal, a época das liquidações é a mais lucrativa para as empresas, por mais estranho que essa afirmação possa parecer. O consumidor cansou de ver seu dinheiro desvalorizar da noite pra o dia.

Maria Alice Rocha/Terra Magazine

Marcas famosas e designers alternativos disputam novo mercado dos design sales

Hábito comum nas terras da rainha é visitar as lojas quando as coleções são lançadas (no caso desta estação foi no mês de março) e aguardar as liquidações para, com um pouquinho de sorte, encontrar a peça escolhida no seu tamanho por 50% do preço.

Desde a semana passada algumas lojas já fixaram o letreiro "summer sale"(liquidação de verao em inglês) na fachada. Não é a toa que as lojas de varejo anunciam na mídia dia e hora que suas liquidações iniciam: tem gente que dorme na fila. Uma das mais conhecidas liquidações de Londres é a da Harrods, que começa no próximo dia 03 de julho, com anúncios circulando pela cidade nos ônibus de dois andares.

Na França a história é um pouco diferente. As liquidações são controladas, para que não haja abuso de nenhuma das partes: nem lojista sendo obrigado a liquidar, nem consumidor deixando de comprar hoje porque o preço pode baixar amanhã. No comércio francês as regras são claras, não mais que doze semanas de promoção são permitidas em cada ponto de venda. Dessa forma, segundo os franceses, "les soldes" (as liquidações em francês) são aguardados com maior frenesi e um pensamento: o que é bom dura pouco.

Voltando à Inglaterra, há menos de cinco anos um fato "mexeu" no consumo do país: os supermercados começaram a vender vestuário de moda, lugar comum no mercado brasileiro há mais tempo. E os grandes varejistas investiram em marca, publicidade e celebridades para conquistarem o seu mercado.

Outro fato que agravou a renúncia por compras de "preço cheio" foi o aparecimento de grandes magazines populares - esbanjando moda - como Primark e Matalan, entre outros. Em tempos de Copa, não custa lembrar que Victoria Beckham (esposa do capitão inglês), que normalmente frequenta as lojas da Bond Street, foi flagrada dia desses procurando umas barganhas na Matalan.

Para aqueles que já se consideram viciados em compras com desconto, cada dia mais se espalha por toda a Europa os centros comerciais "off price" (algo como fora do preço, em inglês).

Marcas famosas que conhecem a demanda reprimida por falta de crédito, e temendo a enxurrada de produtos genéricos no guarda-roupa de seus clientes em potencial, providenciam coleções "ponta de estoque" especialmente pra suprir essas lojas de desconto. Como atração, claro, algumas peças pinçadas das coleções que desfilaram nas revistas de moda. Dependendo da sorte, é possível conseguir um original com precinho de "pirata".

Para os mais "descolados" e corpinho de manequim (36/38 para mulheres e 38/40 para os homens), correm soltas em Londres as "sample sale" (liquidação de mostruário). Peças utilizadas em desfiles, editorias de moda, eventos ou até aquelas que não foram aprovadas para produção passaram a ser "objetos de desejo".

No começo era apenas uma "faxina" no atelier de alguns estilistas, mas esse tipo de venda tem tomado uma dimensão tão grande e (inesperada) que tem "design sale" cobrando entrada somente pra ver o que está exposto nas araras.

Marcas famosas e designers alternativos disputam esse novo mercado, regado a exclusividade e movido pela rede de relacionamentos pessoais. A divulgação destes eventos fica restrita a uma seleta lista de clientes ou a uma pequena patotinha. O chique é comprar um tênis Adidas cofeccionado em couro de avestruz que não passou no teste para o mercado de massa. Detalhe: só foram fabricados três unidades no mundo inteiro (número 40) para serem examinados pelos diretores de marketing da empresa. Basta esse tipo de burburinho para o par de sapatos ser disputado.

O negócio está rendendo tanto que já tem loja "online" vendendo algumas peças como "aperitivo" para as grandes liquidações. Aquilo que há um tempo atrás era descartado como refugo, por não ter apelo comercial ou por dificuldades de execução virou peça exclusivérrima, concorrida e dependendo do babado, caríssima. Na moda, essas coisas também acontecem nas melhores famílias inglesas.

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