

# Fast fashion: Consumer perceptions of country of brand origin

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## ABSTRACT

The aim of the paper is to explore consumers' perceptions of country of brand origin of fast fashion apparel. Country of Brand Origin (COBO) research demonstrates the influence of a brand's origin country on consumer decision-making and the significance of a product's external cues in determining its quality and intention to purchase. Studies have shown that consumers can identify the COBO based on inference or proxy and can infer COBO when certain attribute information is missing from the product or brand description. However, sensory proxies are also used to identify the country of origin of different products and the paper extends this line of research into consumers' sensory perceptions of garments but also lived experience.

The project took an exploratory, qualitative approach and was undertaken with a purposive sample of forty female participants aged 18 to 60. The participants were able to visually examine and touch garments from well-known fast fashion brands before trying them on; this stage was followed by in-depth interviews. They were then asked to identify the country of origin of each fashion brand and make any further associations between the apparel, brand and COBO. The findings reveal that consumers make conscious and subconscious associations with the COBO based on their knowledge of countries visited on holiday or from being domiciled there. These associations are influenced by various factors such as childhood, memorable experiences and travel experiences. This study proposes a nuanced model that more accurately reflects how the sensory stimuli influence consumers to recall lived experiences and develop personal assumptions when naming the country of origin of branded fashion apparel. The project's management significance lies in its implications for consumer behaviour and its impact on brand identity, positioning and reputation.

**Keywords:** Country of Brand Origin, Brands, Lived experience

## INTRODUCTION

This paper explores how consumers use lived experience and subjective episodes as cues to evaluate the country of brand origin (COBO) of branded fashion apparel.

COBO research demonstrates the influence of a brand's origin country on consumer decision-making and the significance of a product's external cues in determining its quality and intention to purchase (Davvetas et al. 2024; Islam and Hussain, 2023). However, studies of COBO recognition have shown consumers' have limited abilities to recognise a brand's country of origin (Martín and Cerviño 2011). To address this limitation, the objectives of this research are twofold, first to understand their lived experience of branded fashion apparel, and second to understand their ability to differentiate the COBO of fashion apparel based on their sensory perception. Lived experience and subjective episodes through sensory stimulation, for example, colour, style or shape can help consumers make sense of a complex and diverse marketplace and allows them to align their personal preferences and values with the products they choose to purchase and wear (Jaziri, 2019).

The current study makes three contributions to the extant empirical COBO fashion apparel literature. First, most of the empirical literature analyses how the consumer's COBO image influences their purchase decision specifically through the stereotypes that they hold about the quality of the imported apparel (Patterson and Tai, 1991; Vrontis et al., 2006; Kim et al., 2017; Kilani and Zorai, 2019; Liu et al., 2021; Mandler et al., 2023), and to a lesser extent, how the brand country judgment is made. Although useful, the extant literature reveals little about how people name the country of branded fashion apparel using knowledge developed from their lived experience combined with their immediate sensory perceptions of apparel. Second, this study contributes by developing insight into consumers' subjective knowledge under the influence of sensory experience and how this impacts decision-making and motivation. The third and practical contribution is that this study helps brand and retailer managers to develop more effective branding and marketing strategies that align with consumers' visual and tactile perceptions of their branded fashion apparel products.

## **LITERATURE REVIEW**

Customer experience is a 'lived experience', a real-life encounter where consumers actively seek meaningful emotional experiences as a result of their interaction with the commercial environment (Holbrook and Hirschman, 1982; Bastiaansen et al., 2019; Jaziri, 2019; Khelladi et al., 2022). Previous research has highlighted how the customer experience includes cognitive, emotional, physical, sensorial, and social responses, and that experiences can be memorable, distinctive and affect-rich which results in improved, individual recall (see Holbrook and Hirschman, 1982; Westhuizen, 2018; Jaziri, 2019; Holmunld et al., 2020; Khelladi et al., 2022).

Lipkin (2016) explains that the characteristics of customer experience are subjective, personal and influenced by stimulus, interaction, and sensemaking (Bustamante and Rubio, 2017). The subjective sensemaking approach extends beyond an interpretative

event to the customers' lifeworld which is created during multiple sensory experiences that include the visual, acoustic, haptic, olfactory, and gustatory senses (Haase et al., 2018). Such sensory experiences in the lifeworld are a reflection of a person's motives (need) and how they feel about a given object and its contribution to enjoyment and satisfaction (Septianto et al., 2020). From a sensory perspective, the consumers' evaluation or judgement of the fashion product can be either subconscious (implicit) or conscious (explicit), making an individual remember the unique experience (Conway, 2008). A similar approach can be used to evaluate the country of brand origin. There is evidence that direct sensory contact such as touching the fabric in the garments offers the consumer more comprehensive information about the tactile attributes and that tactile attributes include softness, heaviness, smoothness and drape (Silva et al., 2023).

COO is epitomised by the "Made in [...]" epithet and in fashion is usually found on the garment label. However, this form of regulated COO can be distinguished from the broader understanding of COO that has arisen from the increased outsourcing of design, materials, and production as the fashion industry has become more globalised (Aichner, 2014). This qualification is necessary because there is ambiguity regarding COO, especially when the country of manufacture may no longer fully correspond to the place in which the product was designed or the brand's home country (Chao, 1998; Rashid and Barnes, 2018).

Previous studies show that people can identify the country of origin based on inference or proxy (Johansson, 1989). They can infer country of origin when certain attribute information is missing from the product or brand description (Mandler et al., 2023). However, sensory proxies are also used to identify the country of origin of different products (Elder et al., 2017; Haase et al., 2018). In the context of apparel, previous studies suggest that people's perceived sense of fabric softness, durability, and strength influence their ability to recognise the country of brand origin (Liu et al., 2021). Daveetas et al., (2024) have highlighted how consumers' association with the product or brand as being its source, regardless of where the product is manufactured is regarded as the brand's country of origin. Affective associations with a country can be influenced by many factors including personal experiences, media representation, and cultural stereotypes. Finally, what is normative is related to the attitudes, beliefs, and values that are commonly associated with people from a particular country or place.

Nevertheless, there is relatively little empirical research into how people use their lived experience and the sensory qualities of garments as cues for identifying the country of brand origin (COBO) of branded fashion apparel. Thus, the following questions were addressed:

- RQ1) How do consumers perceive the COBO of garments, utilising sensory visual, sense of touch perceptions and their lived experience.

- RQ2) To what extent do consumers utilise personal knowledge to evaluate the country of brand origin of fashion brands?

## **METHODOLOGY**

The study adopts an interpretive-descriptive design and a qualitative interview approach. This is considered appropriate because it provides rich accounts of participants' thoughts and perceptions of the apparel products and the assumptions about their brand origin through lived and sensory experiences (Rashid et al., 2024). The participants were recruited using purposive sampling and ranged in age from 18 to 55 (Branco-Illodo and Heath, 2020; Chrimes et al., 2022) and who resided in central England (Branco-Illodo and Heath, 2020).

The researchers employed a three-stage, multimethod qualitative approach (Branco-Illodo et al., 2020), giving participants five minutes to visually examine and touch the garments before trying them on, followed by in-depth interviews to seek in-depth account of how consumers feel and make associations with the country of brand origin using lived and sensory experience. The sizes of the garments were chosen based on the participant's typical size, ranging from 8 – 16 and included dresses, t-shirts, and trousers from the fashion brands Zara, H&M, M&S Primark, whose brand and COO labels were visible. During the individuals' interaction with the garments, they were asked about their initial impressions of the branded garments to understand their symbolic constructions of wearing clothes and how they discern the country of origin. Following the product examination, forty semi-structured interviews were undertaken.

The interviews were recorded, transcribed and content analysed following King and Horrocks's (2010) three-stage template procedural technique of descriptive coding, interpretative coding, and overarching coding. The first step entailed developing a template for descriptive coding and familiarisation with the data by going over it multiple times before developing initial themes or sub-themes from the literature, interview questions, and the interview transcripts (King and Horrocks, 2010; King et al., 2018). The first five interview questions and literature analysis were used to develop an initial template of themes and sub-themes, which included topics such as knowledge developed through lived experience, knowledge developed through sensory perception, that is, what individuals see, hear, and thereby make assumptions. Line by line, the remaining transcripts were then examined for any text that might be pertinent to each of the topics (Yates and Skinner, 2021). This helped to understand how participants felt after trying on clothes (Chrimes et al., 2022) and how they evaluated country of brand origin based on their recall used different memorable experiences and visual characteristics such as colour or print as cues.

Once the descriptive codes were gathered, the second stage involved interpreting the codes by referring back to the transcripts and placing the information gathered from

the interviews under appropriate themes (King and Horrocks, 2010). The themes were first knowledge influenced by direct lived experience and second knowledge influenced by sensory perception and their relationship with COBO. The transcripts were independently analysed and coded by the research team and compared with each other (Atkinson and Delamont, 2010).

## **RESULTS AND DISCUSSION**

Sense and knowledge gained from lived experiences were often interwoven with memories leading to other recollections and associations. Associations from the visual sense were made by participants closely observing clothes worn by others, friends, relatives and less directly by popular culture. These indirectly observed sources included bloggers on social media, influencers, celebrities, musicians, images they had seen in films, TV reality shows such as the Kardashians and YouTube. The second sense, was touch through the personal fit of a garment and the feel of the material, which was associated with other clothes that the participant had bought from a brand, for example commenting that the sample garment “fits really well...” but also knowing that other brands did not fit well or that their clothes were uncomfortable.

### **Visual Cues**

The first part of the analysis focused on the sensory elements of the apparel that were identified by the participants and the associations they made with their lived experiences. Visual cues were the most cited. Previous studies have indicated that consumers commonly associate red with China (Jacobs et al., 1991) and two participants associated the red dress from Zara with China, with the memory triggered by anime cartoons but also recalled from seeing red lanterns on UK streets during Chinese New Year. In contrast, participant AR associated a red top with the Middle East, based on what she had seen her colleague wear. Other colours held different associations, for example the green trousers with Scotland and Ireland with links to nature and St Patrick’s Day.

Second, participants evaluated the clothes from their perceptions of colour combined with their design, style and ‘look’, and associated them with countries where they had seen a similar garment. Italy was typically associated with fashionable style and an innate dress sense. Although not directly observed, China or Japan were mentioned as countries where typically flowery patterns are seen on a red dress. Participant AF, who was previously domiciled in Japan but was now based in the UK said that the green trousers from M&S reminded her of looks from Paris or Milan, because “*they are more free with fashion choice*”. The climate led to further associations of the colour and design of the clothes with countries and places; seeing Parisian vloggers wearing similar colours, reminded one participant of autumn days there.

Personal assumptions that capture the cognitive dimension of social perception and

beliefs of a country can be described as stereotypical (Diamantopoulos et al., 2021). Stereotyping was evident in the data analysis where participants made generalisations from associations based on holiday trips, where participants expect people in warmer European countries to wear brighter colours. Commonly, experiences of holidays in the Mediterranean and the perceived vibrance of these countries led to associations with colours, from which a red dress was associated with Spain and specifically with a flamenco style. Beach holidays in particular provided plenty of opportunity to observe how other people dress and draw conclusions about colour and design. Participant AH explained that they “.....would say [brand name] is European, maybe French or Italy, because of the colour and style of the clothes, maybe something someone would wear in a sunny summer seaside.”

The design features of apparel formed a second theme that influenced participants' interpretation of their COBO. For example, participant ML's cultural association came from the design of the neckline of the dress, which reminded her of her Punjabi friends and the traditional "chunni", typically worn in Punjabi culture. The neckline's cowl triggered a symbolic connection by the way “it wraps around the front, hanging over both shoulders creating this kind of cowl”. Even small styling details such as a zip on the back of a dress can remind participants of Asia through their knowledge of anime cartoons. British apparel was discussed in both stereotypical language and through individual insights arising from participants' often highly developed knowledge of a brand's style and look. Perceptions of colours, materials, quality and fit were often defined by the participant's personal taste and preference for what they looked or would like to look good in. In this way, stretchy materials in one design created “a British vibe”, youthful looks were perceived as contemporaneously British, dark colours reflected the UK's gloomy weather and the quality of the materials were thought to be an attribute of the Marks and Spencer's brand. In summary, the sensory perception of the garment's COBO using colour and design as a cue, was reinforced by participants' lived experiences, from direct observation from being in other countries for holidays or from living there and their indirect experiences of similar-styled trends in images of other women.

### **Prints and embroidery as cues to evaluate country of brand origin**

A second visual characteristic that participants associated with lived experiences was prints and patterns used on the surface of the garment. Some prints were very closely identified with a specific country; in particular floral prints that were clearly associated with the UK from the participants' experiences of wearing this type of print from childhood to seeing the print in the present day. AR, who had previously lived in Scandinavia, observed the blue and black dress with animal print and mentioned how it reminded her of ‘Scandy design, very bold and functional’ reminding her of a well-known designer from her home country. Other prints were more problematic. One participant brought up in Greece associated the animal print with Britain, because “...I've seen it here, I kind of associated it with UK with England”. Embroidery on the

surface of the garment provided another cue that participants used to make associations. Another participant associated the stitching on the blue blouse with 'Swiss or Greek kind of stitching'. Both prints and embroideries provide a strong visual means for participants to associate garments with different countries and to make inferences that in the second stage of analysis, was evident in inferences they made about COBO.

### **Materiality and fit**

The participants' reflections on the fabric properties were reinforced by the sense of touch, particularly how the red dress fitted on the participant's body, its length, and how the light weight and texture of the product was considered good quality. TM alluded to how the floral dress reminded her of holidays in Cuba due to the flares, which moved with her, when she tried on. This finding is in line with corresponds to Halkias et al.'s (2022) study indicating how consumers use intrinsic cues to associate garments with country of origin. Another aspect participants considered was the fit of the garment. For instance, AS noted the skin-contact sensation of a navy dress and the way it fitted comfortably on her body shape, associating it with Marks and Spencer, and the feelings of a British holiday. In contrast, participant AG checked out a red dress from Zara and said that it looked well-fitted, with a cut suited for smaller individuals. During her holidays in Spain, she had noticed that people there tended to have a slimmer appearance.

However, poor fit led to other lived experience associations. There was a perception that American consumers tend to have a larger body shape and that garments designed for this market are more generously sized and have a looser fit. But direct experience also played a part. A degree of confusion was evident when more specific associations were made. JB said she was reluctant to order apparel products from American retailers after having a poor fitting experience with an online Chinese retailer, which she thought was an American brand based on its product style and models. A second important finding that emerged during the interviews was how the participants affectively related apparel size to perceptions of another country's people (Vijaranakorn and Shannon, 2017). The participants liked the style of Chinese and Japanese apparel but were reluctant to order Chinese branded products because of the perception that they may be designed for Chinese consumers who are more petite compared to the British market, resulting in different – smaller - garment sizes.

### **Knowledge of the country of brand origin**

In the second part of the research, participants were prompted to articulate their awareness of the COBO of the branded fashion apparel and how they used the cues from their lived experience about a brand name, to evaluate the origin of a brand. Participants appeared to associate specific apparel items, such as the style of a dress or its, with certain countries or cultural events; being 'reminded' was frequently used by participants as the clothes brought back general and more specific memories and

associations. It was evident that participants recognised the brands in the apparel sample; however, a noticeable gap existed between their lived experience associations, their recognition of the brand and their awareness of the product's COBO. For example, in the case of a floral dress from Primark, participants did not focus on the brand until they were specifically asked about Primark's COBO, at which point they immediately began to examine the brand labels.

The cues to assess the COBO of British brands Primark and New Look were primarily based on the perception of 'cheap quality', although some participants identified them as American due to their perceived low quality, specifically looser fitting, and experience with similar garments of rapid colour fading, increased susceptibility to wear and tear and poor durability. In addition, familiarity with celebrity endorsements was significant in identifying British COBO, as participant HC observed, '... I think that the amount of styles that they have in Primark are based on a lot of celebrities like, for example, Cheryl Cole'. Non-British brands' COBO were evaluated through personal knowledge. For instance, participant FZ incorrectly identified Zara as a Swedish brand, an association she made by assessing its quality alongside another brand whose products she knew originated from Sweden. She explained, "Zara is from somewhere in Europe which produces affordable items, products. So I first think of IKEA, yeah, it's from Sweden and it's affordable". Other participants evaluated the brand origin based on the sound of the brand name, for example, H&M was incorrectly perceived to be German. On the other hand, Participant AG, thought H&M was a brand from Spain or Portugal, 'because I think H&M is owned by, or owns like, Pull & Bear, Stradivarius, which I think is predominantly Portugal-based'. These emergent themes from the data emphasised the associations with COBO from sensory perceptions - touch and vision - which in the case of the British brands tended to be widely shared and the more individual associations non-British brands that drew on lived experience. The degree of familiarity and more general knowledge and experience of the product, the brand and other countries contributed to the variability and accuracy of the associations.

## **CONCLUSION**

This study found that the COBO for branded apparel products is evaluated in two different ways. First, the findings extend the previous literature on the lived experience of branded apparel (Bastiannsen et al., 2019). The results show that participants were able to evaluate branded fashion apparel through their lived experiences of holiday travel and memories of their home country (Westhuizen, 2018). However, the examination of lived and sensory experiences in relation to COBO has revealed that despite consumers' awareness of the brand and the emotional connection, their ability to accurately identify the brand's origins is noticeably limited. Associations often stemmed from memorable lived experiences, such as observing a colour trend in a specific country during a holiday. Furthermore, their subjective knowledge influenced

their evaluations, which were shaped by observations of apparel worn by others, including celebrities in vlogs and depicted in images.

Second, the findings demonstrate that the sensory stimuli such as colour, style and fitting, impact customers' thought processes so that their beliefs, impressions and ideas (Diamantopoulos et al., 2020; Suter et al., 2021; Mandler et al., 2023) lead to the recall of memorable, distinctive and affect-rich experiences (Diamantopoulos et al., 2020), which are used to name the country of origin of branded fashion apparel. Similarly, if customers do not have a direct experience, they use sensory stimuli to formulate personal assumptions to name the country of origin and to explain how they feel, instead of caring about the manufacturing country or the brand's origin. Such perceptions of the product's country of origin reflect stereotyping. Schatzle and Jacob (2019) state that stereotypes are pervasive and assist individuals in organising their thoughts and interpreting complex environments. This study demonstrates how assumptions about COBO can be made based on the sound of the brand name or on the absence of a brand in other countries; in other words if it's not seen in another country it must be British. Finally, the study highlights the implications of perceived COBO for the management of fashion brands. The significance of the 'made in' label is moderated by sensory stimuli, specifically style, colour, price and the fit of the garment, evoking a lived experience, which affects consumer perceptions of product quality and brand meaning.

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