The Growth of Eclectic Consumption by the Contemporary Consumer in the United Kingdom and its Impact on Fashion Marketing Strategy

Key words: fashion theories / consumer purchase behaviour / media communication / marketing strategy

Abstract

The theories of trickle-down, bubble-up and trickle-across aim to categorize the directional flow of a style's emergence, as it spreads through the market to mass acceptance, by identifying design concepts coming from the catwalk, the street, or proliferating between providers on the same fashion level.

Traditionally, styles would be accessed through providers on a market level (for example, designer, middle market, or value fashion) relevant to the consumer's segmentation characteristics, with each provider having a sourcing strategy supporting the quality expectations of the level in which they positioned themselves. However, global off-shore sourcing strategies now pervade all levels of fashion marketing, with production location not necessarily an indication of quality.

The contemporary consumer now has access to information presented by a multitude of media publications, with haute couture brands appearing next to similarly styled garments from mass produced value sources. Thus, consumption behaviour in the fashion sector has seen a paradigm shift in consumer attitudes and their perception of fashion levels relevant to them.

Utilising a questionnaire, with a sample of 100 female respondents aged 18-26 based in Manchester (UK), this research considers the range of fashion providers they frequent; their level of spending on fashion; what factors they consider most important when deciding on fashion purchases; finally, their information sources were established.

The respondents identified 58 preferred fashion providers, from designer to charity shops. They reported that consideration of garment quality was less important than style, fit, and price, with production location not deemed as an important evaluation criterion. Their main information sources ranged from quality monthly publications to weekly celebrity focused magazines.

This paper argues that contemporary fashion consumers gain information from a multiplicity of sources, which is increasingly influencing their eclectic consumption from a variety of fashion levels. Theories on style transmission and the affect on global sourcing strategies are explored.

Introduction

Traditionally, there was a clear divide in the fashion sector between different levels of provision. However, the development of limited editions and premium ranges by high street fashion brands, which is a European term for retailers who sell low-cost high fashion garments (Edenkamp, 2004), has led to a blurring of the lines between the mass market providers and the prét-à-porter or diffusion-line designer labels. This situation has arisen through the constant flow of design ideas from the catwalk to the high street brands (trickle-down); from subcultures and lower levels in society upwards to designer creations (bubble-up or trickle-up); and across providers on similar levels (trickle-across). Polhemus (1994: 10) refers to this as creating a multiplicity of directional flow of influences between the fashion levels, which he asserts has allowed the fashion process to be a "fully fledged creative democracy in which talent isn't to be limited by class or race or education or how much money you've got in the bank".

The fashion market in the United Kingdom (UK), in recent years, has been dominated by competition on price, which has been supported by the sourcing strategies of fashion brands focussing on low-cost offshore production. Despite the rise in the official price inflation rate, the fashion sector has seen price deflation of 16.8% between 2002-07 (Verdict, 2007). This has been created by the rise of value retailers, which, according to Verdict (2007: 58), has been "the biggest driver of deflation in the womenswear market over the last 10 years – resetting consumer expectations of entry level price points". Conversely, this price deflation has coincided with an increase in total spending of 20.1% over the same period, indicating that, despite falling prices, womenswear consumers are buying clothes in greater quantities.

In the UK, there are 9.7million individuals who were born between 1980 and 1991; this represents 15.9% of the total population and equates to 19.6% of resident adults (Gower, 2007). Workman and Studak (2005) suggest that the influences of peers, print media and the entertainment sector increases as individuals become adults. This is a core target market for clothing retailers, which includes those between 15-24 years who are the consumers with the highest propensity to focus on fast-moving fashion (Mintel, 2006a). Mintel (2007a) further asserts that this segment has become "addicted to the content newness offered by cheap fast fashion". However, Verdict (2007: 22) predicts that the fashion market is now changing and they claim that competition on price is no longer a defining factor for success. Hence, they propose that consumers are now starting to expect more than a value proposition to be motivated to buy from a particular brand.

The interaction between price and quality assessment can be stimulated by the astute use of advertising (Brassington and Pettitt, 2003), which can be found in consumer magazines. Added incentives, such as premium and celebrity ranges, have created differentiation between brands and contributed to the perception of credibility of the fashion provided by the retailer (Verdict, 2007).

Mintel (2007a) suggests that combining luxury and the high street has created new rules, which were instigated in 2004 by collaboration between H&M and Karl Lagerfeld. This resulted in two previously disparate fashion sectors coming together in a strategic alliance (Tungate, 2005). Subsequent collaborations with H&M involved design ranges by Stella McCartney followed in 2005, with Viktor and Rolf in 2006. Similarly, high street retailer Topshop has shown its range at London Fashion week for the past two years (Deeley, 2007). Furthermore, in May 2007, Topshop launched a celebrity collaboration with Kate Moss (a fashion model), which has seen international interest in brand soar (Butler, 2007).

Mintel (2007a) claims that these collaborations have created in the consumer a wish to "bask in the glow of a celebrity", and involves three motivations, which are either "getting closer to the magic person by wearing something from their wardrobe, or by having essentially employed the A-lister as your tailor, or for the kudos of wearing a designer label." Therefore, promotion in the fashion sector includes elements relating to the creation of an image by association with particular celebrity lifestyles.

Fashion is at the core of women's magazines (Mintel 2007a), defined by Kidd (2007: 2) as being publications that consumers "buy to enhance their private and social lives…" by giving them "…entertainment, news or information, or maybe a combination of all three." There are a variety of magazine formats. However, for the purpose of this research, two categories of magazines will be considered; they are titles that are published either weekly or monthly and are focused towards the female market. The titles in this sector that have seen an increase in sales include Hello!, Heat, Closer, Grazia, Now! (in the weekly category) and Glamour, Red, Elle and Vogue (in the monthly category). These titles contain celebrity and fashion coverage, directed both overtly through advertising and subtly through public relations.

This research considers the changing nature of the fashion sector, the consumption of magazines by contemporary consumers, and the factors that influence consumers when buying fashion items.

Literature Review

Fashion Theories

Polhemus (1994) suggests that, traditionally, three characteristic principals have related to the fashion sector. Firstly, he claims that it celebrates what is new; secondly, it portrays singularity; and, finally, that it is diffused through society, originally from a high level to the mass market in a trickle-down direction. This trickle-down affect was proposed in 1904 by Georg Simmel, who linked class structure to product adoption (Solomon and Rabolt, 2004) and identified the desire of the masses to impersonate those they considered to have status.

Speaking in a similar period, social analyst Thorstein Veblen established the concept of conspicuous consumption. He proposed that consumers overtly display their wealth through the consumption of luxury items (Solomon and Rabolt, 2004). Although he was speaking at the beginning of the twentieth century, conspicuous consumption through the purchase of branded items is still prevalent today, with O'Cass (2004) asserting that materialistic values are a significant contributor in the purchase of fashion items. This is demonstrated by haute couture designers who reap the benefit of consumers' aspirational buying through the demand for prêt-a-porter or diffusion-line ranges. These collections are shown through the fashion shows in London, Paris, Milan and New York, which generate interest and are covered by fashion media (Jenkyns Jones, 2005). Subsequently, mass-fashion providers emulate these collections, translating them for mass consumption at a fraction of the price (Cleland, 2007)

The upward transmission of styles (from subcultures, or lower levels in society, to the more prestigious levels) has also been a feature of the sector for a considerable period of time. This is known as bubble-up or trickle-up theory. Furthermore, the promotion of mass culture through information channels has bought about the development of a third theory of directional flow (Solomon and Rabolt, 2004). Trickle-across occurs where brands monitor their competitors and attempt to source styles similar to those that are selling well.

However, this creates debate as to whether a style being replicated by other fashion levels is exploitative (Polhemus, 1994). It could be argued that the blurring of the lines between fashion levels is encouraging an environment where exploitation is rife from top-down, bottom-up and across providers on the same level, as they compete with one another. Furthermore, Polhemus (1996) believes that fashion has become a catch-all term with no distinct meaning. Hence, the merging of the fashion levels could be diluting the discrete identity of each category.

The ability to combine styles from different level is creating a “pure fashion” consumer who indulges in selective extravagance (Mintel, 2006b). This trend is increasingly affecting all levels of fashion, with consumers from the upper-end of the market (who would not traditionally be attracted to the high street) following celebrity guidance by mixing and matching garments from different fashion levels. Conversely, the high street providers are producing limited edition and premium fashion collections on the high street, which have fuelled what Mintel (2006b) refers to as a frenzy by generating an environment of impulse buying by promoting a message of “when it’s gone it’s gone” (WIGIG) through limiting availability. This has created a highly competitive womenswear market in the UK.

Womenswear Market in the UK

The market for womenswear in the UK increased by 5% in 2006, with the average women spending £715.30 on clothing items during the year (Verdict, 2007). Furthermore, Mintel (2007a) forecasts that between 2007-2012 there will be a further growth of over 18% in sales in the clothing sector.

Clothing and shoes are the number one choice for 58% of women when they spend their money (Mintel, 2006a). However, this focus on fashion consumption is not uniform across all market sectors, with Frings (2005) referring to the most profitable to the fashion sector being those between 18-25 years old and Mintel (2006b) reporting that the 15-24 year old market segment spend a greater amount on fashion items than more mature consumers. These consumers, in their late teens and twenties, are known as Generation Y (Solomon and Rabolt, 2004), with Gower (2007: 132) asserting that,

> Generation Y adults are fashion conscious and looking after their appearance is important to them. Consequently, expenditure on clothing and footwear tends to be a higher priority for these adults compared with the rest of the population.

Mintel (2007a) refers to these fashion consumers as having a seemingly insatiable desire for what is new. This has resulted in the UK having a high proportion of value-orientated shoppers, with fast fashion and cheap chic providers predominating over the last five years. According to Mesure (2007), bargain fashion accounts for a quarter of the total spent on clothing in the UK.

Price has been a major determinant in the clothing market (Mintel, 2006b). According to Brassington and Pettit (2003: 392), “From the buyer’s perspective, price represents the value they attach to whatever is being exchanged”. Thus, the combination of price perceptions related to quality expectations has become a highly competitive tool in fashion marketing.

Mintel (2006b) describe the contemporary clothing market as resembling a figure 8. This, they explain, is due to an increase in sales in both the designer and value sectors, with the middle market losing ground. However, there is increasingly a blurring of the divide between what is considered to be a designer label and premium high street brands. This has encouraged an appetite for more aspirational products in contemporary fashion consumers and it is predicted that consumers are starting to move away from low-cost disposable fashion, towards buying higher quality garments (Kollewe, 2007), but in reduced quantities (Mintel 2007a).

Verdict (2007) suggests that “For higher prices, higher quality items, standards must be set higher for both materials and production”. Quality is multi-dimensional, which Brassington and Pettitt (2003: 331) claim can be “defined in terms of reliability, durability and dependability” and can also relate to “speed, taste, colour, materials, ingredients and even price and packaging”. However, the consumer’s assessment of price verses quality expectations is highly subjective and can relate to the mental reference points of the individual consumer.

Consideration of the affect of production location on quality perceptions had diminished as an important evaluative criterion in the fashion sector over the last twenty years. Subsequently, brands have decided in favour of offshore sourcing by moving production to low-cost countries to satisfy their strategic aims (Jones, 2006). A recent example is Burberry, who, despite months of protest that attracted support from politicians and celebrities, closed its plant in the UK in March 2007 and moved production to China (BBC, 2007).

However, increasingly, publicity surrounding the affect of environmental damage and the pollution caused by global transportation is being highlighted (Vidal, 2007). This is focusing attention on sourcing polices and includes the consideration of social and environmental aspects of marketing, involving the social efficiency costs of global sourcing. These costs take into account the affects of pollution and the cost of the measures needed to reduce any harm it may cause (Baron, 2006) and they are becoming a major focus of marketing strategy planning.

Media Communication

The diffusion of information about new and innovative products takes time and must be planned for. The paradox in the fashion sector is that the decline in interest in a style often happens due to the generation of interest in something new. Therefore, the sector is caught in a requirement for continuous innovation in an effort to maintain the consumers' interest in a market saturated with suppliers. Thus, new product development and the rising of awareness of the offer through promotional activity are essential in a highly competitive market.

Creating awareness involves generating knowledge through the transmission of information, which stimulates consumer interest (Brassington and Pettitt, 2003). The manner in which the stimulation is created can lead to a desire for consumption and the action to buy. However, this process affects consumers at different rates and it relates to their eagerness to adopt that which they perceive to be innovative.

Consumers who are innovators are more likely to have a greater exposure to fashion related magazines than non-innovators (Schiffman and Kanuk, 2004). This exposure has been enhanced by the expansion of the UK consumer magazine market, which is now the largest in Europe (Kidd, 2007). This sector has become saturated in the past 20 years, thus creating a new era in the magazine sector (Pringle, 2004) with weekly magazines proving to be strong competition for the monthly titles. Celebrity associations are a main focus of women's magazines and add to their content appeal. Research by Key Note indicates that women are more likely than men to buy a celebrity focused magazine, with 20.3% of the female population being regular purchasers, compared to only 7% of men (Kidd, 2007). The age of the consumer also impacts on their purchase behaviour, with the most prolific consumers of magazines being 20-24 (32.9%) and 25-24 (25.4%) (Kidd, 2007).

Women, have a higher propensity than men to assemble an outfit from more than one source (Mintel, 2006b). This trend has been encouraged by articles in women focused magazines where they present a collection of garments from a variety of providers. This has created eclectic patterns of fashion consumption by helping to simplify the process of combining garments from a multiplicity of fashion levels to produce a coordinated look.

According to Mintel (2007b) fashion advertisers target press communication channels more than other advertising sectors, investing heavily in advertising and reinforcing brand messages through promotional activities (Newman and Patel, 2004). Furthermore, Mintel (2007b) reports that the top ten retailers have doubled their spending on advertising in the past four years. This, they claim, has been driven by the aim of moving from a price-driven focus to promoting aspiration. To achieve this fashion advertisers use high-profile campaigns in a variety of media, including monthly fashion led magazines, and weekly celebrity focused publications and weekly supplements in national newspapers (Mintel, 2006b). These fashion focused magazines are one of the largest categories in terms of circulation.

Therefore, consideration needs to be given to the fashion market, its use of magazines as a communication channel, and the factors that influence the contemporary consumer.

Methodology

This paper details the preliminary research undertaken in preparation for a larger study designed to analyse consumers' knowledge and attitudes to contemporary issues relating to the global supply chain. The methodological framework for the research involves consideration of the research design, which directs the chosen strategy by determining the most appropriate research methods to employ (Bryman, 2001) and sets out the rationale behind the research process utilised to gain warranted knowledge (Gill and Johnson, 2002).

Theory can emerge as an outcome of research through constructivism, using an inductive approach, or research can be postpositive, which tests established theory through a deductive approach (Figure 1).

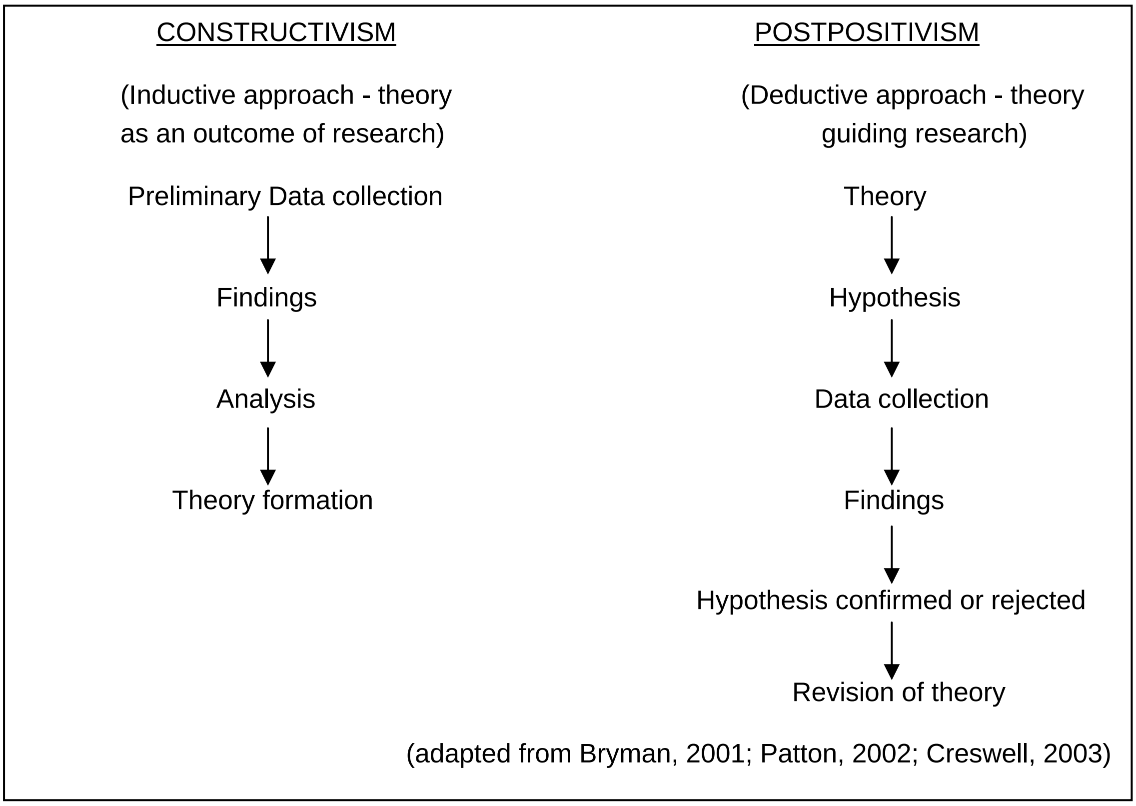

Figure 1. Constructivism and Postpositivism Paradigms

This paper sets out the initial inductive stage of the research (utilising both secondary and primary methods) with the main focus being a review of literature, leading to the devising and piloting of a questionnaire for the proposed larger scale deductive study.

The guiding principle of the inductive approach is the development of relevant concepts, rather than testing presupposed hypotheses, by promoting the creative synthesis of theory (Patton, 2002). The secondary literature review required a critical examination of current thinking published in relevant literature (Gill and Johnson, 2002) to connect the study to the contemporary ongoing debate by authors writing in the field (Creswell, 2003), with theoretical underpinnings articulated through analysis (Fisher and Lovell, 2006).

Subsequent to the secondary data analysis, a questionnaire was devised with a combination of questions types designed to elicit responses that allowed for scaled opinions to be expressed. The questionnaire was piloted in September 2006. Piloting is described by Biemer and Lyberg (2003:365) as generating information "to improve the design of the main survey", which enabled the questionnaire to be tested for relevance and ease of use as a research method for application in the proposed research.

The questionnaire was administered to a non-probability purposive sample (Crouch and Housden, 2003) of 100 female respondents based in Manchester (UK), all of whom had purchased an item of clothing within the 31 days preceding the survey. The respondents were targeted by age and gender. For the purposes of this research, the age range concentrated on consumers, within Generation Y, who are between 18-26 years old. This segment corresponds with research by Mintel (2007b) who found that 15-24 year old consumers are "very receptive to all forms of advertising", with women more likely than men to be affected by fashion advertising. The selected age range is, also, the middle range of the definition by Mintel (2006a), who identified those between 15-34 years as the consumers who enjoy shopping and who have the highest propensity to spend on discretionary fashion items. Analysis of the collected data was achieved using SPSS and used both descriptive measurements and correlations between variables.

Biemer and Lyberg (2003:365) claim that the design of a pilot survey,

> …depends heavily on the survey's goals but will usually allow for reliable quantitative information and should be conducted at a time when the preliminary design of the main survey can still be adjusted or even changed considerably.

To facilitate this process, the results of the research were divided into three discreet elements. Firstly, the consumers' knowledge of ethical issues in the global supply chain; secondly, their understanding of Corporate Social Responsibility policies; and, finally, the transmission of information about current styles and its affect on where consumers choose to purchase fashion related items. Each category was submitted to relevant international academic conferences (the first two elements were presented during 2007 and this paper forms the bases of the final category). This approach generated valuable feedback, supporting the theoretical foundations and the creation of hypothesis for the proposed larger study.

Subsequent to the analysis of this preliminary pilot study, and the generation of feedback on the initial results, changes have been made to the wording and structure of the questionnaire as it is prepared for use in the larger study.

Results

According to Biemer and Lyberg (2003:367), "For pilot studies, it is usually more sound to draw conclusions from estimation rather than significance tests", with inference "often based on intuition rather than rigorous statistical principles" (2003:365). Therefore, the following results are presented as indicative of preliminary findings rather than a conclusive representation of the total research.

The respondents in the sample were aged between 18-26 years old; 57% were in the category 18-20, 24% were 21-23 and the final 19% were aged 24-26. All stated that they had brought a garment within the previous 31 days; 76% of these had made their purchase within the six days preceding the research.

When asked to name where they purchased fashion items, 58 preferred providers (from designer fashion brands, to high street providers and charity shops) were identified. Designer labels (2%) and charity shops (2%) were stated as the sole provider by 4% of the respondents. Six out of ten (61%) identified brands concentrated on the high street, with 29% indicating a combination of high street and designer led labels. The brand that was most often mentioned by respondents favouring the high street and by those who combined their providers was Topshop (overall identified by 73% of respondents, which equates to 92% of high street purchasers and 66% of those who mix and match between levels).

This was also reflected when the respondents were asked to state the source from where they most often purchase, which narrowed the range to 15 providers (Table 1).

RATING	BRAND	%
1	Topshop	44
2	H&M	13
3	Primark	10
4	Miss Selfridge	1
5	Zara	8
6	River Island	5
7	Mango	4
8	Diesel	1
9	French Connection	1
10	Harvey Nichols	1
11	Levi	1
12	Replay	1
13	Whistles	2
14	Designers at Debenhams	1
15	Next	1
16	Not stated	6
	Total	100

Table 1. Most purchased fashion providers

This list identified providers from low-cost value fashion (for example, Primark), to high street brands that produce premium lines (including Topshop and H&M) and prêt-a-porter or diffusion-line ranges found in Harvey Nichols and Designers at Debenhams.

When attention was given to where the consumers source their information on the latest fashions and styles, the respondents identified on a range of media. The most reported source of information were fashion and celebrity based magazines, with only 9% reporting that they did not buy fashion based titles; broadsheet newspapers were considered by 7%; whereas tabloid newspapers were rated at 9%; with television identified by one in ten (10%).

Subsequently, the highest scoring category (fashion and celebrity based magazines) was further divided between weekly and monthly publications (Table 2).

		Do you regularly buy a monthly fashion/celebrity magazine?		
		No	Yes	Total
Do you regularly buy a weekly fashion/celebrity magazine?	No	9	17	26
	yes	58	16	74
Total		67	33	100

Table 2. Magazines – weekly/monthly purchase (%)

There was a clear preference amongst the respondents for buying weekly magazines (74%) compared to monthly titles (33%). Nearly half of those who bought a monthly title (16 out of 33 respondents) also purchased a weekly publication. Furthermore, 17% of the respondents limited their purchase to monthly titles, compared to more than half (58%) who only purchase weekly magazines.

Consideration was given to the level of spending on fashion items by respondents compared to whether they purchased a weekly or monthly publication (Table 3). Two thirds (64%) of the respondents claim to spend more than £1001 per year on fashion related items; the respondents who were the most prolific at spending (i.e. more than £2000 per year) favoured monthly magazines, whereas more than a third (36%) of weekly publication buyers spent £1000 or less.

LEVEL OF SPENDING	WEEKLY TITLE		MONTHLY TITLE	
	no	yes	no	Yes
£100-£500	6	4	10	0
£501-£1000	4	22	25	1
£1001-£1500	1	14	10	5
£1501-2000	2	15	11	6
£2001-£2500	2	10	5	7
£2501-£3000	5	6	4	7
£3001-£3500	1	2	2	1
£3501-£4000	0	1	0	1
£4501-£5000	2	0	0	2
More than £5000	3	0	0	3
TOTAL	26	74	67	33

Table 3. Spending on fashion compared to weekly or monthly magazine purchase.

The respondents were asked what factors they take into consideration when purchasing a fashion item. The respondents were asked to rate colour, fabric, fit, price, promotional image, quality and style on a scale of 1~7 (1=least important; 2=unimportant; 3= not necessary; 4=desirable; 5=important; 6=very important; 7=essential).

The highest rated category was style, which was identified by 19% of the respondents as the most important factor. This equates to a mode rating of 7 and a mean score of 5.31. Fit was rated second at 18% (6 mode; 5.1 mean), with price third at 15% (4 mode; 4.28 mean). Furthermore, colour was identified by 14% (3 mode; 3.9 mean). Quality (3 mode; 3.62 mean), fabric (2 mode; 2.97 mean) and brand reputation (1 mode; 2.86 mean) were rated at 13%, 11% and 10% respectively (Table 4).

What aspects do you Consider when purchasing an item of clothing?	No.	ORDER OF PERFERENCE	LEVEL OF IMPORTANCE (%)	POSSIBLE RATING	MODE	MEAN
STYLE	100	1	19	1 ~ 7	7	5.31
FIT	100	2	18	1 ~ 7	6	5.10
PRICE	100	3	15	1 ~ 7	4	4.28
COLOUR	100	4	14	1 ~ 7	3	3.90
QUALITY	100	5	13	1 ~ 7	3	3.62
FABRIC	100	6	11	1 ~ 7	2	2.97
BRAND REPUTATION	100	7	10	1 ~ 7	1	2.86

Table 4. Purchase Considerations

Further consideration was given to the standard deviation (SD) to assess the range of responses in the four aspects that could be affected by the perception created through promotional activity. These aspects are style, price, quality, and brand reputation. Brand reputation displayed the widest range (SD of 2.288), which indicated that this category divided opinion to a greater extent than any other. The SD range resulted from 49% of respondents who rated brand reputation as the least important factor, compared to 16% who deemed it as essential. Conversely, 7% claimed that style was the factor they considered least important compared to 47% claiming it to be essential (SD 2.092). Price and quality both had narrower ranges, with SD scores of 1.664 and 1.613 respectively (Table 5).

What aspects do you consider when purchasing an item An item of clothing?	No.	RATING 1-3 NOT NECESSARY OR BELOW	RATING 4-7 DESIRABLE OR ABOVE	LEAST IMPORTANT FACTOR	MOST IMPORTANT FACTOR	STANDARD DEVIATION
STYLE	100	22	78	7	47	2.092
FIT	100	13	87	5	17	1.573
PRICE	100	30	70	4	8	1.664
COLOUR	100	47	53	3	4	1.567
QUALITY	100	53	47	10	5	1.613
FABRIC	100	66	34	21	3	1.636
BRAND REPUTATION	100	68	32	49	16	2.288

Table 5. Evaluation Criteria in Clothing Purchase
(N.B. Rating: 1=least important; 2=unimportant; 3= not necessary;
4=desirable; 5=important; 6=very important; 7=essential)

This information was, subsequently, cross-tabulated with the respondents' choice of magazine publication, which showed that, in general, style and quality were more important to those purchasing monthly magazines, whereas brand reputation was more influential to those who purchased weekly publications, with price also deemed as having a greater importance to respondents who bought from the weekly category (Table 6).

What aspects do you consider when purchasing an item an item of clothing?	MAGAZINE TYPE	RATING 1-3 NOT NECESSARY OR BELOW	RATING 4-7 DESIRABLE OR ABOVE	LEAST IMPORTANT FACTOR	MOST IMPORTANT FACTOR
STYLE	*Weekly*	*23*	*77*	*8*	*45*
	Monthly	15	85	9	52
PRICE	*Weekly*	*31*	*69*	*3*	*9*
	Monthly	27	73	6	6
QUALITY	*Weekly*	*40*	*46*	*11*	*7*
	Monthly	52	49	12	6
BRAND REPUTATION	*Weekly*	*66*	*34*	*50*	*18*
	Monthly	76	24	55	9

Table 6. Magazine Purchase affect on Evaluation Criteria in Clothing Purchase (%)

Consideration was given to the location of production of the last fashion item that the respondents had purchased. Eight out of ten (82%) who had purchased within the last six days, and nine out of ten (94%) of the respondents who had purchased up to a month previously, could not identify its location of manufacture.

The respondents were further divided by type of publication. Of those who purchase a weekly magazine, 92% did not know where their last purchase was produced, compared to 91% who bought monthly publications. Additional consideration was given to whether the respondents actively look for information to identify location of production (Table 7).

	MAGAZINE TYPE	NEVER	RARELY	SOMETIMES	USUALLY	ALWAYS
Do you look to the label to establish where it was made?	WEEKLY	28	28	33	10	1
	MONTHLY	22	33	33	12	0
Does the manufacturing location affect your decision?	WEEKLY	45	39	13	3	0
	MONTHLY	45	49	6	0	0

Table 7. Production location knowledge (% of respondents in each category)
N.B. The figures are presented as a representative of the percentage of respondents who buy monthly titles compared to weekly publications.

When asked if they actively look for location production information, 56% of weekly magazine purchasers, and 55% of monthly subscribers, stated that they either rarely or never looked for such information. Only one in ten (11% for weekly and 12% for monthly titles) usually or always look. However, this figure reduced when asked if the information would affect purchase decisions; 14% of weekly magazine readers stated that it sometimes or usually had an impact, compared to only 6% of monthly publication purchasers. Neither category reported that it always has an affect (Table 7).

Discussion and Conclusion

The respondents in the primary research were aged 18-26 and had all purchased a fashion item within the month prior to completing the questionnaire. This backs the claim that this market segment is highly motivated to consume fashion items (Mintel, 2006b) and have a high propensity to focus on fast-moving fashion (Mintel, 2006a). Furthermore, two thirds (64%) identified that their level of spending on fashion items exceeded £1001 per year. This compares to the average spending by women consumers of £715.30 and supports Frings (2005) who referred to 18-25 year olds as a profitable segment for the fashion sector.

The market for fashion and celebrity related magazines has shown significant growth in the last 20 years. The respondents demonstrated a high propensity to consume these publications, with only 9% claiming that they did not buy such magazines. Additionally, the consumer magazine market has seen an increase in weekly titles, compared to traditional monthly magazines. This preference was evident in the results, with 74% buying a publication available on a weekly bases compared to 33% who favoured the monthly formats. This level of consumption is far higher than the overall average for the female population, which according to Kidd (2007) involves 20.3% of females as regular purchasers. Fashion advertisers target press media as a communication channel (Mintel, 2007b). Given the level of consumption found in this study, both from the perspective of the amount spent on fashion items and the respondent propensity to purchase fashion related magazines, targeting these highly motivated, high spending, consumers through this medium of transmission is an appropriate use of marketing resources.

The fashion providers identified by the respondents ranged from low-cost value fashion retailers, to premium range and prêt-a-porter brands. Topshop, which combines high street fashion with designer collaborations, was identified as a favoured provider by three-quarter (73%) of the respondents, with nearly half (44%) stating it as the brand from whom they most often purchased. H&M was named second on the list by 13% of the sample. Topshop exemplifies the new rules created by the strategic alliance (Tungate, 2005) of combining luxury and the high street through premium ranges, which was first instigated by H&M (Mintel, 2007a), and is symbolic of the trend of eclectic consumption through mixing and matching garment from a variety of fashion levels, as identified by Mintel (2006b). This brand has epitomised the blurring of the lines of directional flow of the emergence of style, with Topshop showing their collection at London Fashion week (bubble-up or trickle-up), including premium ranges in their offering (trickle-down) and being seen as a major force on the high street, which other brands are likely to monitor (trickle-across).

Despite price deflation over the past ten years, due to the massive growth in the value market, Verdict (2007) predicts that fashion consumers are starting to expect more than differentiation through price competition. Companies have followed a trend to source from low-cost production locations (Jones, 2006). An example of this is Burberry (BBC, 2007) who ceased domestic production to move offshore. However, concern over global sourcing strategies is growing and fashion sector brands are increasingly considering their social and environmental practices and using these factors in their strategic marketing planning.

However, this research found little evidence that global sourcing concerns are affecting the 18-26 year old market segment. When asked what factors influence their fashion purchases, style and quality were favoured by readers of monthly magazines, with brand reputation and price preferred by those buying weekly titles. When asked, directly, if they consider production location, only one in ten (11% of those purchasing weekly publications and 12% buying monthly titles) stated that they usually or always look for evidence of the location of production. Furthermore, there was little evidence that this information actually affects the final decision to purchase, with only 3% stating that it usually had an impact and none of the respondent saying it always did. This would indicate that production location is not a motivating factor for the 18-26 year old segment and that concerns about global sourcing has not impacted on their behaviour when it comes to the purchase of fashion items. Thus, the claims that the fashion market is changing and that consumers are moving away from a low-cost value proposition have not been bourn out by this research.

The limitation of this research is that it has been carried out over the past 14 months and the opinions stated by the respondents were formulated prior to the highlighting of damage and pollution caused by global transportation (Vidal, 2007). However, the value of this research is that it is being undertaken at a time of increased scrutiny by media communication sources of the impact of global consumption and, therefore, the full scale research will investigate its influence on consumer attitudes and purchase behaviour.

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