

RESEARCH PAPER

Market trend for women outerwear : A study of preferences of customers, retailers and forecasters

SURABHI MAHAJAN* AND AMISHA OHRI

Department of Apparel and Textile Science, College of Home Science, Punjab Agricultural University, LUDHIANA (PUNJAB) INDIA (Email : surabhimahajanct@pau.edu)

ABSTRACT

Fashion market research and solutions for the apparel market have become very popular with the spread of consumer culture throughout the world. In recent years, high competitiveness, market complexity and technological advances allow the trend process to be rapidly developed. Leading brands rely on trend reports of such researches for comprehensive information and analysis about consumer spending and shopping behaviour plus customized solutions that drive better business decisions. A number of specialized organizations/agencies have come up to help understand who is buying apparel and other products, and how, why and where they are shopping. Their forecasts are generally reliable and this is the reason that apparel industry is spending huge amounts on trend reports. The present paper aims to investigate the similarities and dissimilarities between preferences of women customers in the age group of 21 to 25 years, trends of the retailers and forecasters of women outerwear fall/ winter of 2011-2012. Results based on the responses of 133 customers, five retailers and a famous forecasting website show that the fundamental relationship between retailers and customers (consumers) has changed. Power has now shifted to consumers who have different needs, enabled by web and mobile technologies and the influence of social media. Retailers are challenged to adapt to these changes to maintain customer loyalty and they have to keep all kinds of merchandise whether in forecast or not if their consumers demand for it.

Key Words : Women outerwear, Customer, Retailer, Fashion, Fashion forecasting trend, Merchandise

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Fashion is not something that exists only in dresses, but it is everywhere. It encompasses the ideas, the way we live and all what is happening around us. Fashion is a general term for a popular style or practice, especially in clothing, footwear, or accessories. Fashion refers to anything that is the current trend in look and dress up of a person and the prevailing style in other things as well. Predicting future fashion trends is an extremely important aspect of the fashion market. Selection of the right fabrics, colours and silhouettes for the next season is certainly a critical matter for anyone involved in fashion design. Unfortunately, the crystal ball method does not always work adequately. Therefore, members of the fashion industry turn to other sources like forecasts, surveys and research to improve their odds of success and stay on trend.

In recent years, high competition, market complexity, and technological advancement have enabled the trend process to develop rapidly. These driving forces enable organizations involved in trend processing to explore new methodology. In developed countries where trend research has long been established, workers are skilled, and budgets are larger, new trend research and application approaches

* Author for correspondence

Amisha Ohri, Fashion Merchandising and Retail Management, FDDI (Footwear Design and Development Institute), ROHTAK (HARYANA) INDIA

are easy to develop. On the other hand, in developing countries where the meaning of trend research is not well known, people lack skills, and budgets are low; alternative ways to gather information to survive in a competitive market are used.

The competitive advantage in design business today is based on the ability to embed user values into competitive products and to innovate new ideas according to social and cultural custom (Ulrich and Eppinger, 1995; Pine, 1997). Trends are a reflection of 'Zeitgeist'— the spirit of the age. Nowadays, trends have partially become a strategic tool for new product planning. Although spotting and predicting trends involve data analysis, it is far from being an exact science, for it requires the element of trying to gain a qualitative sense of the trends that are emerging (Jordan, 2001).

The presence of more and more brands has created a competitive environment unheard of in the past (Rutter and Edwards, 1999). A major change in today's society is the expanded role of female consumers as more and more woman enter the labour market (Schiffman and Kanuk in Shim and Kotsiopulos, 1993), resulting in higher disposable income for female consumers. Consequently they are recognized by apparel marketers as a sought after target market (Cassill and Drake, 1987). International fashion brands are targeting Indian youth as they have now access to more and more money than before and with this have come independence, aspirations and a demand for new branded products.

One of the major components of brand knowledge is brand awareness, which is taken as the ability of a potential buyer to recognize or recall that a brand is a member of a certain product category. It is created by an increase in the acquaintance of the brands through repeated exposure, strong associations and consumption cues (Keller, 2003). 'Brand knowledge' defined as brand information that relates with the brand stored in a consumer memory. Brand knowledge can be categorized in two aspects: brand awareness and brand image (Keller, 2004). 'Brand awareness' is the strength of brand which is reflected by the identification of that brand under several conditions. It is a combination of recognition and recall performance. *Brand image* is consumers' perception about the brand. Customers depend on their brand knowledge to decide among competing brands which determines their thinking and response to different stimuli regarding a particular brand (O'Cass, 2000 and O'Cass and Lim, 2002). Thus, a consumer's decision to buy a product or service is the result of interplay of many forces or stimuli (Kotler and Armstrong, 2006). But there are not enough studies which considered gender issue in respect of consumer attitude and branded apparels existing in fashion industry, except few ones (Taylor and Cosenza, 2002; Alexander, 2005 and Nam *et al.*, 2007).

However, there is limited literature available on the

forecasts of fashion trends and actual buying behaviour in India. The present study has been undertaken to find out whether the trends mentioned in the fashion sources and forecast actually match with what the retailers are selling in the market and what customers are wearing. Women outerwear including jackets and coats were selected for this purpose and data were collected in the biggest and extremely popular mall in Ludhiana, named MBD Neopolis, Ferozepur Road.

Objectives :

- The specific objectives of this paper are as follows :
- To find out the preferences of women aged 21 to 25 years for their outerwear for fall/ winter of 2011-12.
 - To investigate the trends in women outerwear products sold by retailers in a mall of metropolitan city of Punjab.
 - To know the fashion forecasting trend of women outerwear for the selected period from a forecasting website.
 - To analyze the similarities and dissimilarities between preference of customers, retailers and forecasters.

RESEARCH METHODOLOGY

Two hundred customers between the age group of 21 to 25 years were randomly selected for the study who visited the MBD mall and wanted to shop for women outerwear. Now-a-days, consumers are attracted towards international brands to a large extent so as to follow the western fashion trends hence for this study, four retailers dealing with international brands and one local brand retailer were purposively selected from within the mall in Ludhiana. These were Calvin Kelvin, Vero-Moda, Gas, Allen Solly and Madame. A famous forecasting website was referred to for finding the forecasting trends for the same period.

RESULTS AND REMONSTRATION

Results of this paper are presented in following four parts corresponding to stated objectives :

Preferences of women for their outerwear:

Information collected from 200 women customers aged 21 to 25 years showed that almost two third of them (n=133; 66.5%) had or wanted jackets as their outerwear, while remaining one third (n=67; 33.5%) had or wanted coats. So, jackets were found to be more popular amongst the customers of this age group and thus the further details about outerwear were confined for those preferring jackets only. This reduced the effective sample size to 133 for further probe.

The responses of selected customers are contained in the Table 1 .

Table 1 : Responses of customers about preferences in jackets (n=133)		
Item	Number of customers	Percentage
Jacket opening		
Side	6	4.5
Front	127	95.5
Length of jacket		
Long (up to knee)	1	0.75
Medium (up to hip)	11	8.2
Short (up to waist)	121	90.9
Colour of jacket		
Neutral colours	51	38.3
Primary colours	21	15.7
Fluorescent colours	0	0
Other colours like pink, green, purple etc.	61	45.8
Jacket sleeves		
With sleeves	27	20.0
Without sleeves	106	80.0
Base fabric of jackets		
Frost free quilted	51	38.3
Twill sherpa	13	10.0
Faux shearling	19	14.0
Cotton	38	28.0
Leather	18	12.0
Designing used in jackets		
Plain	110	82.7
Checks, herringbone, stripes etc.	23	17.2
Decoration/ embellishments/accessories used in jackets		
Logo	6	4.5
Zippers	93	70.0
Buckles and belts	8	6.0
Fasteners	20	12.0
Flaps and princess panel	10	7.5
Type of collars and necklines used in jackets		
High neck	17	12.7
Polo neck	38	28.5
Simple shawl collar	10	7.5
Jacket with hood	68	51.3

Reading of data contained in Table 1 shows the following facts :

- Front openings in jackets were more popular amongst the selected customers than side openings as they were preferred by all except 6 of them.

- Short jackets up to waist were usually preferred by overwhelming customers as compared to long (up to knee) or medium (up to hip) jackets.

- Majority of the customers, who were little less than two-third, preferred jacket colours like pink, green, purple

etc., followed by nearly half customers who showed preference for neutral colours like black and white. Almost one-fifth preferred jackets in primary colours like blue, yellow and red and no customer preferred jacket in fluorescent colour.

- Eight out of every ten customers preferred sleeveless jackets as compared to remaining two who liked jackets with sleeves.

- Frost free quilted fabric for jackets was the most popular as compared to cotton, faux shearling, leather and twill sherpa jackets.

- Plain jackets were preferred by more than three-fourth of the customers rather than checks, stripes etc. which are liked by less than one-fifth.

- As regards the decoration/embellishments/accessories used in jackets, the zippers were the most common and preferred embellishment or accessory that the customers wanted to have, followed by fasteners like buttons, flaps and princess panel, buckles and belts. The least preferred were logos of various kinds.

- Almost half of the selected customers showed preference for jackets with hood. These customers were followed by a little more than one-fourth those who preferred polo neck jackets, high neck jackets and simple shirt shawl collars were preferred by remaining one-fifth sampled customers.

Facts collected from retailers:

Many visits were made to five selected retail outlets in MBD mall in Ludhiana (Calvin Kelvin : Shop No. 14, ground floor; Vero-Moda : Shop No. 5, ground floor; Gas : Shop No. 16, ground floor; Allen Solly : Shop No. 23, first floor; and Madame : Shop No. 6, second floor) and apart from observation as the tool for data collection, informal interviews were also conducted with the sale staff and managers about their merchandise related to women outerwear especially jackets. The following information were collected:

- All the five retail outlets offered mostly the front open women's jackets and in few numbers had jackets with side openings.

- Three out of five retail outlets i.e. Calvin Kelvin, Vero-Moda, and Gas, had all the lengths available in jackets like long, medium and short whereas Allen Solly and Madame had only short and medium length jackets.

- As far as colours of the jackets were concerned, all the retail outlets had majority of colours like black, white, red, pink, blue, purple, green with them except for Gas outlet where black, brown and white colours were predominating. The only colours that were usually not seen in all outlets were fluorescent except for Vero-Moda which also had many jackets in fluorescent yellow, green and orange.

- Jackets were both with sleeves and sleeveless in all

the outlets.

– Jackets were available in fabrics like leather, frost free quilted and faux-shearling in the four international brand outlets while in Madame outlet, jackets were available mostly in wool blends. Leather jackets were rarely seen and even where they were present, very few number and styles were available.

– Plain jackets were present in Calvin Kelvin, Vero-Moda and Allen Solly whereas checks, lines and stripes were seen in jackets in Gas and Madame outlet.

– Accessories used in jackets were mostly metal zippers, buckles and fasteners in all the outlets. International logos were also part of almost all jackets in the four outlets except Madame.

– Jackets with hoods and fancy collars was the most dominating feature in Allen Solly and Calvin Kelvin outlet while in Gas outlet, formal jackets with shawl collar was usually seen. As far as Vero-Moda and Madame outlets were concerned, jackets with hoods were mostly available.

Fashion trend forecast for fall/winter of 2011-12:

Forecasting is the systematic method of looking for pattern, trend and change in product preferences of customers. The forecaster must predict not only the product preferences but also when changes will occur with these style preferences. Two aspects of forecasting- qualitative and quantitative are there. The qualitative aspect is called fashion forecasting, whereas, the quantitative forecasting is called sales forecasting. The various highlights of the fashion forecasting site referred for fall winter of 2011-12 trends are as follows:

Designs:

The forecast suggested single colours and materials' mix, complemented by wool or window checks, herringbone, Prince-of- Wales, dog's tooth check and informal designs. tapestry patterns, stripes, bright wool checks, tartans, English micro-checks, flannel checks, Prince of Wales, pied-de-poule, animal designs, geometrics, rhombuses, zigzags, chessboard patterns, monochrome checks and stained patterns. Winter flowers and motives derived from the Arts and Crafts movement were also forecasted.

Styles:

Short and medium jackets with military details, worker-style with tape ideas, coats and jackets in bright wool, tweeds, checks, fur and wool waistcoats, extra long blazers, velvet and quilted jackets and coats are with decorative trimmings based on costume ideas were suggested for this period. Plain wrap-around coats, hoods, collarless shapes, blazer coats with cross seams, fabric blazers with leather details in a materials' mix and fly fronts or hidden button facings. Casual wear is reinterpreted in a modern way through patterned

pieces with a feminine cut in both sleeved and sleeveless designs. Important pieces are wool coats with front zipper and pocket details, decorative linings, logos, patches, buckles, fur coats and pelt jackets, capes, fur-lined parka-shapes.

Colours:

Designers continue to exhibit a degree of caution for fall 2010, yet offer a palette of beauty and excitement with a blending of colours, some with similar undertones, in surprising and intriguing combinations. Bright range of colours combined with neutral and mock black, red, blue, wine, dark brown, slate, coral, orange, rosé, purple, matisse-blue, silver, egg-yolk yellow, beige, camel, brown, flannel, navy etc and gold, copper, heather grey and olive as combination colours were forecasted. For consumer's practicality plus their desire for newness, designers also forecasted many options for women to extend and embellish fluorescent colours in their wardrobes in this period.

Fabrics:

Waxed cotton, leather in cognac diamond and brown shades, wool, crêpes, satins, single structures, bouclés, peeling effects, soft mohair's, alpacas, double-face, flames, silk satins, jerseys, nape and braided leather, sheepskin, woven and tweed fabrics, leather effects, harrington's, tweeds, frost free quilted and shetlands were forecasted. Compact wool cloths, uniforms and laden types, crepes, satins, super-stretch, graphic velvets, velour with a patina, wool-stretch with glossy effects, formal silk types, jacquards with reliefs, rubber and patent finishes, masculine leather, shiny leather and leather imitations, geometric quilting, glossy high-tech, sheepskin were commonly predicted for this period.

Similarities and dissimilarities between customers' preferences, retailers' merchandise and trend forecast for fall/winter of 2011-12:

The following facts emerge about the similarities in these three :

– As far as opening of outerwear is concerned, there was a similarity between customer preference, retailers merchandise and trend forecast as all the three suggested front open jackets to be more in fashion as compared to the side opening ones.

– Almost all colours in jackets were displayed by the retail stores as also mentioned in forecast. Different colours were given preference in varying percentages by the consumers as well.

– Frost free quilted fabric jackets were popular amongst consumers and they were also suggested to be in fashion by the retailers and the forecast.

– Jackets with hoods were preferred by the customers and it was also predominating in two retail outlets and

available in a good variety in the other three.

Dissimilarities found between the customers' preferences, retailers' merchandise and trend forecast for fall/winter of 2011-12 are as follows:

- As seen from customers' preference, jackets were more popular where as retailers had complete range of coats also displayed in their retail stores. The same scenario was observed in the forecast where both jackets and coats were forecasted to be in fashion.

- For jacket length, customers preferred short jackets till waist where as the retailers had all lengths of jackets with more of short and medium ones. Even the forecast suggested that both short and medium jackets and extra long coats and blazers will be in fashion in this period.

- Fluorescent colours were not preferred by customers at all but they were mentioned to be in fashion by the forecast and were also displayed in one of the selected retail outlet.

- Customers preferred more of sleeveless jackets as the fashion statement whereas the retailers and forecast both suggested that sleeveless and with sleeves jackets will be in fashion.

- Leather jackets in different colours were suggested by the forecast but it was seen only with one retailer that too in limited sizes and variety and it was also less popular amongst customers as only 12% liked it.

- Plain jackets were mostly preferred by customers (82.7%) while very few (17.3%) liked designed jackets in checks, stripes etc. But these designed jackets were available with the retailers in a good variety and number and also mentioned to be in fashion by the forecast which suggested that either single and material mix or textured jackets will be in fashion.

- As evident from the customers' data in the table, they preferred zippers the most as compared to other accessories. The retailers on the other hand had many accessories in jackets including zippers, logos, buckles etc. This was also suggested by the forecast. Logos were not at all preferred by the customers.

- Jackets with hoods were predominating as far as customers preference and retailers merchandise is concerned but according to the forecast, both hood jackets and jackets with collars were predicted to be in fashion for this period.

Conclusion:

In the retail industry, a buyer is an individual who selects what items will be stocked in a store, based on his or her predictions about what will be popular with customers. Retail buyers usually work closely with designers and sales representatives and attend trade fairs, fashion shows and refer forecasting sites or literature to observe trends. Successful forecasting is critical to success of retailers who sells

fashion related merchandise. The right merchandise must be available when the consumer perceives a need for it. On the other hand, if merchandise is offered by the retailer, it in turns motivates the consumer to buy and then sale is made. The sale will contribute to the profit of any business. Hence, a cyclic relationship is observed between fashion forecast, retailers merchandise and consumer preference.

According to the findings of this study, it can be concluded that though a relationship exists between all the three as mentioned above, still it is impossible to forecast the likings and disliking of consumers to the fullest. They are the king in the market place and so may reject anything which is in forecast or retailers are selling on one hand and on the other may ask for some different merchandise thus creating a demand for it. It can be concluded that similarities exist between fashion forecast, retailers merchandise and consumer preference to some extent but there are differences also which may be a result of the following points:

- Forecasting sites and sources are not that readily available to consumers and retailers as these are paid sites involving huge amount of cost to refer to. Some retailers afford it and keep merchandise accordingly while some follow the footpaths of their competitors and whatever is available to them at convenience.

- Some consumers are very price conscious and hence their preferences get biased according to the cost of the merchandise. Even if they like a costly fashionable product, they will be satisfied with less fashionable merchandise which is cheaper.

- All consumers are not fashion conscious so they would try to fit in their old belongings in place even if the fashion is something different.

So the fundamental relationship between retailers and consumers has changed. Power has shifted to consumers who have different needs, enabled by web and mobile technologies and the influence of social media. Retailers are challenged to adapt to these changes to maintain customer loyalty and they have to keep all kinds of merchandise whether in forecast or not if their consumers demand for it.

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