

The Impact of Country of Origin on Retail and Wholesale Brands in the UK Fashion Industry



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School of Materials

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List of Publications

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- 2) Rashid, A., Barnes., L. and Warnaby, G. (2016) Management perspectives on country of origin. *Journal of Fashion Marketing and Management*, 20(2), pp. 230-244.
- 3) Rashid, A. (2014) Country of Origin in Fashion Retail Brands. Featured in *Textiles: The Quarterly Magazine of the Textile Institute*, Available at:
https://issuu.com/textileinstitute/docs/textiles_magazine_3-4_2014_issuu
- 4) Rashid, A. and Barnes, L. (2014) Country of origin constructs in fashion retail brands. Abstract featured in The 89th Textile Institute World Conference, Wuhan, China.

University of Manchester

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Doctor of Philosophy

The impact of country of origin on retail and wholesale brands in the UK fashion industry

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Abstract

The purpose of this study is to examine the impact of country of origin (COO) on the UK fashion industry, with specific reference to retail and wholesale brands. In this study, the fashion industry encompasses both manufacturing and branding perspectives. This qualitative study comprised 23 in-depth interviews with key informants from large-scale retailers, manufacturers and textile consultancy companies, thereby analysing the issues from an industry, rather than consumer, perspective. The key informants were chosen using a judgmental sampling approach, and the data obtained were analysed using a thematic approach.

The notion of country of origin is deemed important because the existing literature suggests that COO, has been considered as an effective branding device with which consumers associate when evaluating the quality of the product and when making purchasing decisions. However, no research has examined country of origin from an industry perspective, and the findings in the UK context are limited in the existing literature.

Consequently, this study contributes to the body of knowledge about the importance of COO, and its implication on retail and wholesale brands in the UK fashion industry. The findings of this research also have practical implications for manufacturers and retailers, informing the debate on the value of the ‘Made in [...]’ epithet, and how country of origin can be used as a branding strategy.

This study demonstrates that country of origin is considered important in the UK fashion industry in terms of its strategic importance to organisations. Moreover, COO is manifested in different ways, depending on brand positioning, long-term strategic plan, expertise, brand history and values.

Another finding that emerged as a key theme is the blurring of retail and wholesale brands. Thus, the study has found that retailers are becoming wholesale-oriented businesses by selling own label products through third party retailers, including online via pure-play retailers (e.g. ASOS), and concessions within department stores. This is being done to expose brands internationally, to develop a global recognition, as well as improve the brand image. Furthermore, wholesale brands are becoming retail-oriented in order to enjoy superior profit margins, to have control over the product merchandise and to increase customer loyalty. Finally, the study developed a typology of strategic action and implications of country of origin to include the blurring of differences whereby, for instance, brand name is used to promote country of brand origin by both retail and wholesale brands, however, how this manifests itself differs in the sense that retailers promote via sub-brand name, and wholesales have associations with company’s name.

Declaration

The work presented in this thesis has been submitted as part of the PhD in Textiles Design, Fashion and Management degree at The University of Manchester. No portion of the work referred to in the thesis has been submitted in support of an application for another degree or qualification of this or any other university or other institute of learning.

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Chapter 1: Introduction

1.1. Research Background

The aim of this research is to examine the impact country of origin has on the fashion industry with specific reference to retail and wholesale brands. In general, country of origin is often described as the place of manufacture, characterised by the “Made in [...]” label (Miranda and Parkvithee, 2013), and is deemed to be an effective branding tool as consumers evaluate the quality of a product based on its place of manufacture as well as from where it brand originates (Samiee et al., 2005). Although the effect of country of origin on consumer perceptions and purchasing intentions has long been of interest to many researchers (e.g. Bilkey and Nes, 1982; Ha-Brookshire, 2012; Hester and Yuen, 1987; Lim and O’Cass 2001; Phau and Chao, 2008; Schooler and Sanoo, 1969; Sharma, 2011; Thakor and Lavack, 2003), perceptions of the role of country of origin from an industry perspective remains an under-researched area.

1.2. Research Literature: Country of Origin

In the literature on country of origin, numerous authors have previously suggested that consumers’ perception of, and associations with, country of origin are often influenced by the reputation (e.g. social, environmental and political factors and workmanship) of the country in question (e.g. Inch and McBride, 2004; Jiménez and Martín, 2012; Lee et al., 2013; Mostafa, 2015; Sharma, 2011). Various authors (e.g. Kaynak and Kara, 2002; Lee et al., 2013; Lin and Chen, 2006; Pecotich and Rosenthal, 2001; Schooler and Sanoo, 1969; Wong et al., 2008) have previously suggested that consumer characteristics such as demographics and cultural values (e.g. ethnocentrism and patriotism) also contribute towards preferences and associations with the country of origin.

The first marketing study addressing the country of origin effect on consumers was conducted by Schooler (1965), whereby the author first utilised a single cue model (e.g. the only variable used was COO information) to investigate the country of origin effect on consumer perception and behaviour (Chao et al., 2005). Following this, various authors used a multi-cue model in their investigations because it was believed that consumers do

not only rely on COO information alone, but also use other informational cues to evaluate the product and make choice decisions, such as product warranty (Li et al., 2000; Thorelli et al., 1989), price and material contents (Eroglu and Machleit, 1989; Wall et al., 1991), store prestige (Jeong et al., 2012; Lin and Sternquist, 1994) and component parts (e.g. Chao, 1998; Chao, 2001; Ha-Brookshire, 2012; Inch and McBride, 1998; Tse et al., 1993). In addition, numerous authors (e.g. Bilkey and Nes, 1982; Han, 1989; Thakor and Kohli, 1996; Samiee et al., 2005; Magnusson et al., 2011; Taylor and Tonsor, 2013; Mostafa, 2015) have looked at different sectors and product categories, focusing on specific regional/national contexts in order to trace the conceptual development of country of origin effects on consumer perception and behaviour. For example, Han (1989) examined halo and summary constructs with specific reference to colour television sets and automobiles (small cars) in the US market. Samiee et al. (2005) examined brand origin using US respondents, Magnusson et al. (2011) examined the LCD TV, automobile and fashion industries to investigate the effect of brand origin perceptions by the US respondents, and Mostafa (2015) used mobile phones as a stimuli product to investigate consumer perception in Cairo and Giza, Egypt. Table 1.1 below summarises the literature on country of origin, looking at different nations and product categories.

Based on the existing literature (see also table 1.1), country of origin does have an impact on consumers from different markets, which varies depending on the type of product category, associating with cultural factors, personal knowledge and stereotypical perceptions and is also linked with emotional, expressive and symbolic factors (Aiello et al., 2009; Fionda and Moore, 2009; Chernatony and Mcenally, 1999; Verlegh and Steenkamp, 1999).

Table 1.1: Literature on country of origin from different countries and product categories

COO regional/national context	Product Categories	Indicative author (s)
Central America; China, Croatia; Lebanon; USA;	Food and Juice	Ahmed et al. 2012; Ozretic-Dosen et al. 2007; Schooler, 1965; Taylor and Tonsor, 2013; Whalley et al. 2014
China; Japan; UK	Wines	Balestrini and Gamble, 2006; Bruwer, and Buller, 2012; Hamlin and Leith, 2006
Canada; USA; Spain; China, Taiwan, India, Vietnam; China	Automobiles	Ahmed and D'Astous, 2003; Brodowsky et al. 2004; Jiménez and Martín, 2012; Magnusson et al. 2011; Pereira et al. 2005; Speece and Nguyen, 2005; Wang and Yang, 2008; Wong et al. 2008.
UK	Passenger car seats	Sharma, 2011
USA	TV	Chao and Rajendran, 1993
Japan and USA	Mountain bikes	Gürhan-Canli and Maheswaran, 2000
Malaysia; Bangladesh	Refrigerators	Uddin et al. 2013; Yasin et al. 2007
China	Personal computers	Chu et al. 2010; Prendergast et al. 2010
UK	Microwave ovens	Balabanis and Diamantopoulos, 2011
Malaysia	Air conditioners	Yasin et al., 2007
Italy, France and Germany; Australia, Singapore; USA	Luxury fashion brands, i.e. Calvin Klein, Burberry, Prada and etc.	Aiello et al. 2009; Sneddon et al. 2014; Lim and O'Cass, 2001; Magnusson et al. 2011
USA	High street fashion brands, i.e. H&M	Magnusson et al. 2011
Egypt	Smart phones	Mostafa, 2015
UK	International trades: Ebay	Hu and Wang, 2006
China	Cruise-line packages	Ahmed et al. 2002
Indonesia	International Airlines	Hamin, 2006

One factor that has emerged from this substantial body of literature is the existence of a range of country of origin constructs, such as country of brand origin, country of design, country of manufacturing and country of parts, among others. In part, this is a response to the evolving global economy, where the “Made in [...]” label may no longer fully correspond to the product/brand’s home country (Chu et al., 2010; Li et al., 2000; Han and Terpstra, 1988; Pecotich and Rosenthal, 2001). Thakor and Kohli (1996) examined country of brand origin and brand image, suggesting that consumers may have limited knowledge about the origin of the brand. According to Samiee et al. (2005), country of brand origin can be associated with the location of the brand owner’s headquarters, regardless of where the *actual* product was manufactured. Magnusson et al. (2011) investigated brand origin

and country of manufacturing and found that country of manufacturing matters very little to consumers, as neither are they interested in finding out the origin of the product, nor do they care about using country of origin to influence their buying process. Essoussi and Merunka (2007) and Hamzaoui and Merunka (2006) investigated the effect of country of design and country of manufacturing on consumers' perceptions, suggesting that it is the place where the physical product with which the brand is generally associated is actually designed or conceived that is important. Chao (2001) and Ha-Brookshire (2012) examined the combined effect of country of parts (COP), country of design (COD) and country of manufacturing (COM) on consumer behaviour and found that consumers may place greater weight on country of design than country of manufacturing/assembly of parts, because the other components (e.g. COA and COP) may have lost some of their information value throughout the years due to increasing outsourcing (Chao, 2001). On the other hand, Ha-Brookshire's (2012) study found that country of parts does matter to US consumers in terms of perceived prices, regardless of where the product is manufactured. Thus, extensive research has been conducted on the impact of country of origin constructs and components on consumer perception and the purchasing process. However, country of origin from an industry perspective, with specific reference to the fashion industry, is limited in the existing literature.

The complexity of the different country of origin constructs mentioned above is of particular relevance to the fashion industry because different aspects of fashion production are frequently located in different countries to take advantages of various location-specific factors, such as lower labour and material costs (Chao, 2001). Thus, the place the product is manufactured (i.e. sewing and finishing) may be in a country where labour costs are low, rather than where it was designed (Hamzaoui and Merunka, 2006; Parkvithee and Miranda, 2012), while the raw materials such as fabrics or yarns and other components (e.g. zips, trims and buttons) used in the product may be sourced from another country entirely (due to climate, expertise, skills and technologies), referred to as country of parts (Chao, 2001). Moreover, all these activities may take place in countries which are not associated by consumers with the place of origin of the actual brand itself (Samiee et al., 2005; Thakor and Kohli, 1996). Furthermore, with the internationalisation of retailing activity (Guercini and Runfola, 2015; Molla-Descals et al., 2012; Runfola and Guercini, 2013), the association of fashion brands with country of origin can differ depending on the origin of the retail outlet or the country in which the product is being sold. For example, a wholesale

brand, which may be generally considered a “British brand”, may be sold in a foreign-owned retail outlet in the UK or overseas, such as Selfridges, Macys or Nordstrom. Consequently, country of origin is also connected to retailing and thus the notion of country of origin is increasing in complexity, and the impact of country of origin under manufacturing and branding aspects with specific reference to fashion retail and wholesale brands in an under-researched area.

1.3. Research Literature: Retail Brands and Wholesale Brands

In general, branding is described as a strategy aimed at creating recognition and differentiation from competitors (Aaker, 1991; Doyle and Stern, 2006; Kotler and Armstrong, 2010) using distinctive approaches such as name, term, sign, symbol, design and other features that reflect the brand values, mission and vision. Zatepilina-Monacell (2014) argues that a brand is not only about the logo design, but also about the story of the product told by companies and their consumers. Furthermore, according to Dillon (2011) and Jackson and Shaw (2008), the concept of branding in the fashion industry is especially important as it creates an emotional and symbolic connotation with the brand’s identity that adds uniqueness and a point of differentiation, on what intrinsically can be a fairly generic product, which consumers subsequently associate with in order to fulfil their needs and desires to achieve a particular status or identity (e.g. Birtwistle and Freathy, 1998; Bridson and Evans, 2004; Keller, 1993; Nia and Zaichkowsky, 2000).

Consequently, fashion retail brands and wholesale brands are compelled to create branding strategies that are designed to communicate individuality to the targeted audience (Birtwistle and Freathy, 1998), increasing customer’s trust (Keller, 1993) and loyalty, and thereby ensuring retail success (Birtwistle et al., 1999). For example, a fashion retail brand may position itself to exceed the innate functional value of its products by providing innovative style and design, by improvements in product quality, or through store ambience, staffing level and the provision of skilled and knowledgeable staff (Birtwistle and Freathy, 1998). Equally, a wholesale brand may position itself to maximise its social, symbolic and emotional values by offering a set of promises to consumers through a strong brand name and high product quality.

As a result, the general concept of branding in a retail context, and in particular specifying the differences between wholesale and retail brands, has been extensively researched (Ailawadi and Keller, 2004; Ailawadi et al., 2008; Birtwistle and Freathy, 1998; Davies, 1992; Glynn et al., 2012; Martenson, 2007; Moore et al., 2000). For instance, Davies (1992) has looked at the concept of retailers as brands in their own right, suggesting that this includes branding both a product and a process, identified via the retailer's own name or a separate brand name, and owned, controlled and marketed by the retail brand store. "Product" within retail branding is described as a tangible attribute solely manufactured, designed and sold in an exclusive retail store (Davies, 1992). On the other hand, "process" is about the service that customers experience as they walk into the store, including customer service, staff, fixtures, warranty and other elements (Davies, 1992).

In the literature on retail marketing, various authors (e.g. Anselmsson and Johansson, 2013; Burt and Davies, 2010; Goworek and McGoldrick, 2015; Martenson, 2007; McColl and Moore, 2011) have used different terminologies for the concept of retail branding, such as private label brands, (Arce-urriza and Cebollada, 2012; Vahie and Paswan, 2006), store brands (Broyles et al., 2011; Davies, 1992), own brands (McColl and Moore, 2011; Moore, 1995), own labels (Vignali et al., 2006) and retail brands (Burt, 2000; Goworek and McGoldrick, 2015; Jara and Cliquet, 2012). However, for the sake of clarity, the thesis uses the term "retail brand(s)" to explain the process and concept of branding a store and its product.

Additionally, various authors have looked at retail brand strategy with specific reference to fashion (e.g. Bridson and Evans, 2004; Carpenter et al., 2005; McColl and Moore, 2011; Moore, 1995), discussing how own brand strategy allows a retail brand to create a unique position in the market place (Ailawadi and Keller, 2004). For instance, Bridson and Evans (2004) examined distinctiveness, functionality, value adding and symbolism with specific reference to fashion retail brands (e.g. Benetton, Dior, Topshop, Victoria Secret and Gap), and suggested how the issue of price premium is becoming increasingly contentious in retail branding. This is because some fashion retailers (e.g. Topshop and H&M) differentiate their brands from competitors through a discounting position. However, Bridson and Evans (2004) argue that a fashion retailer with symbolic values may still be considered a brand regardless of its pricing strategy. McColl and Moore (2011) examined the development of own brand strategy in different types of fashion retail brands,

including value, middle market, fast fashion, and foreign retailers, while Lopez and Fan (2009) and Molla-Descals et al. (2012) looked at retail branding from an international context.

Furthermore, numerous authors have identified a range of benefits concerning retail brand strategy, such as store differentiation (Sudhir and Talukdar, 2004), control over merchandise design and profit margin (Juhl et al., 2006; McColl and Moore, 2011), control over the supply chain (Moore et al., 2007), pricing (Carpenter et al., 2005; Goworek and McGoldrick, 2015), packaging design (Wells et al., 2007), product and service quality, and store image (Moore et al., 2007). However, no research to date has considered country of origin with reference to retail brands. A full review of branding and retail branding (e.g. “product” and “process”) will be addressed in chapter 3.

Moreover, researchers have also shown interest in the concept of wholesale branding (Keiser and Garner, 2012), also referred to as manufacturer brands (Chimhundu et al., 2010; Goworek and McGoldrick, 2015) or lifestyle brands (Salmon, 2013), described as a strategy of branding a product owned and created with a unique label by the manufacturers or suppliers (Chimhundu et al., 2010). This thesis uses the term “wholesale brands” to represent fashion brands that may have historically been manufacturers in their own right (Dicken, 2015), such as Ralph Lauren and Barbour as well as other fashion brands (e.g. Superdry, Joules and others) that later emerged in the market as retailers in their own right with dedicated retail stores.

Dicken (2015) points out that some wholesale brands could also be regarded as manufacturers in their own right, as they had ownership of the manufacturing facilities in the past but, due to high production costs, most are now use offshore subcontractors and are entirely design or marketing focused companies or brands, distributing their products in a series of wholesale distribution channels such as department stores, independent stores, concessions (Kumar, 1997; Salmon, 2013), and within own dedicated channels and stores. For example, fashion wholesale brands (e.g. Burberry, Barbour and Henri Lloyd) that initially established their brand by using a British identity and manufacturing in the UK, have now increasingly moved most of the production overseas and developed the brand into a retail brand through their own dedicated stores as well as distributing the products through third-party distributors (Dicken, 2015; Goworek and McGoldrick, 2015;

McGoldrick, 2002). However, the British association for these brands continues to play a key part in their brand values and branding strategies, as some (limited) wholesale brands are still manufacturing some of their product lines in the UK, but the majority of the production occurs overseas.

On the other hand, there are some wholesale brands for whom heritage is an integral part of their brand identity and brand message. Thus, country of origin becomes an important aspect of the brand heritage story (e.g. Burberry and the trench coat, Barbour and the wax jacket, and Henri Lloyd and its sailing apparel). Chapter 3, section 3.8 will address wholesale brand strategy and indicate different types of wholesale brands in more detail. However, no research to date has examined how different country of origin components are important and used in the fashion business in the context where the differences between the two are increasingly blurring.

Similarly, increasing changes have occurred in branding strategies, with retail brands becoming more like wholesale brands and/or manufacturer brands (Leingpibul et al., 2013; McGoldrick, 2002). For instance, many British retailers (e.g. Topshop, River Island and Dorothy Perkins), who in the past would have sold merchandise in their own exclusive retail stores, are now also using a wholesale strategy, selling their retail branded products not only through exclusive retail stores, but also through other third party distributors (e.g. department stores, online retailers and concessions). However, very limited research has been done with reference to the blurring differences between retail and wholesale brands. Likewise, a detailed analysis of the country of origin concept from an industry perspective in this particular context is lacking in the existing literature on country of origin, retailing and marketing.

1.4. Research Literature: Supply Chain Context

Another aspect of this research is the consideration of country of origin on the fashion industry from a supply chain point of view. This is particularly pertinent in fashion apparel manufacturing given the increasing pressure for manufacturers to respond to market demands quickly (fast fashion) (Barnes and Lea-Greenwood, 2006). For example, to satisfy customers' unpredictable demands and respond effectively, buyers may source products from countries within close proximity, e.g. Eastern Europe, Turkey, Mexico and

the Dominican Republic (Orcao and Perez, 2014). In this case, country of manufacture is determined by punctuality (delivery speed), opportunity and the quality of the service provided (Orcao and Perez, 2014). On the other hand, buyers may source products from China, India or Bangladesh in order to achieve lower labour cost advantages (e.g. Towers et al., 2013; Perry et al., 2013). Thus, faced with the increase in global sourcing (and the resulting emphasis on economies of scale) as well as greater levels of market segmentation and differentiation in retailing (e.g. Burt and Davies, 2010; Davies, 1992; McColl and Moore, 2013), various authors have shown increasing interest towards developments such as overseas production, flexibility in design, quality, delivery performance, speed to market, customer services, and concept-to-market product cycle time (Doyle et al., 2006; Barnes and Lea-Greenwood, 2006; Li et al., 2000), as well as differentiating retail brand strategy (Davies, 1992; Martenson, 2007; McColl and Moore 2011).

To remain competitive in the evolving fashion industry, many fashion brands (both retail and wholesale brands), have reconfigured organisational boundaries by having their own-branded products designed in-house by suppliers and/or other third party designers, whilst sourcing fabric and other components from and performing actual product assembly in other countries to achieve competitive locational advantages (Hamzaoui and Merunka, 2006; McCormick et al., 2014) or to decrease production lead-times. These developments have implications for the country of origin concept, especially as the retailers themselves are regarded as brands in their own right (Davies, 1992; McColl and Moore, 2011; Mitchell et al., 2012), with implications for the notion of brand origin. However, the importance of country of origin within these changing dynamics from an industry perspective remains an under-researched area.

1.5. The Research Problem

The focus on the fashion industry, which encompasses both manufacturing and branding aspects, is relevant because the structure of the fashion industry has significantly changed since the 1990s, with mass apparel manufacturing shifting overseas in order to gain competitive advantage through lower labour costs (Barnes and Lea-Greenwood, 2006; Moore et al., 2007). Thus, to remain price competitive in the face of increased competition by value retail brands such as Primark and New Look (McColl and Moore, 2011) and the emergence of retail own-brands such as Principles, Next and River Island, premium retail

brands such as Boden and Joules (McCormick et al., 2014) as well as foreign fast fashion retail brands such as H&M, ZARA and Mango (McColl and Moore, 2011), many wholesale brands have become retail-oriented businesses, using retail brand strategy as well as wholesale strategy in order to have more control on the product merchandise. Moreover, many retail brands are also becoming wholesale brands to expose their brands and expand internationally, integrating supply chain activities for the purpose of reducing lead-times. Thus, due to the evolving nature of the fashion industry (e.g. global sourcing, manufacturing and marketing activities), accurately specifying country of origin in this context is becoming even harder, resulting in both retail and wholesale brands having dual or multinational origins. However, no research to date has examined the impact country of origin has on the UK fashion industry, particularly where the differences between retail and wholesale brands have become obscured. Thus, using a qualitative interview approach, this study will provide an industry perspective on the importance and impact of country of origin in the context of wholesale and retail brands.

1.6. Aim

The aim of this research is to examine the impact of country of origin on the UK fashion industry, with specific reference to retail and wholesale brands.

1.7. Objectives

In order to achieve the research aim, the following objectives have been identified:

1 – Examine the current literature on country of origin with particular emphasis on evaluating the components and different concepts of country of origin, in the specific context of retail brands and wholesale brands in the fashion industry.

2– Investigate industry perceptions of country of origin via a series of key informant interviews from the fashion industry incorporating retailer and manufacturer perspectives.

3 – Develop a typology of strategic actions with regard to the optimum use of the various dimensions of the COO concept in the context of the UK fashion industry.

1.8. Contribution

Using qualitative interviews with key informants in the fashion industry, this study will contribute new knowledge to the literature of country of origin in the context of retail brands and wholesale brands, previously documented from consumers' perspectives (Chao, 1998; Inch and McBride, 1998; Inch and McBride, 2004), from a more specific industry perspective. As the study considers the importance and use of country of origin and its impact on retail brands and wholesale brands, this study also adds knowledge to marketing and branding literature.

The study initially intended to interview key informants from fashion retail and wholesale brands. However, when the qualitative interview process started, it became apparent that the differences between retail and wholesale brands have become increasingly blurred in the UK fashion industry. The findings with references to blurring between retail and wholesale became one of the key findings of the study, adding knowledge to the literature of retailing (Davies, 1992) and to the structure of the fashion industry, and providing much scope for future research. Given the significant changes in the fashion retail sector, it was timely for a re-examination of these concepts and their definitions.

1.9. Thesis Structure

This Ph.D. thesis is divided into seven chapters, as follows:

Chapter 1: Introduction

In the first chapter, the study provides an overview of the research, highlighting the research gap it seeks to fill, followed by an articulation of the aim and objectives.

Chapter 2: Country of Origin

In the second chapter, the study will first review existing theory on country of origin, discussing the components and concepts from consumer perspectives reviewed in the previous literature on the subject. This will allow the researcher to identify the dimensions contributing to the specific context of retail brands and wholesale brands in the fashion industry.

Chapter 3: Branding

In the third chapter, the study first discusses the broad concept of branding, encompassing brand knowledge and brand identity. The chapter then discusses brand elements with particular reference to retail brands and wholesale brands, including brand segmentation, strategies and retail formats.

Chapter 4: Research Framework Model Development

In the fourth chapter, the study first provides propositioning emerging from the existing literature regarding the concept of country of origin, followed by a developing model that is assembled from the existing literature.

Chapter 5: Research Methodology

In the fifth chapter, the study first reviews different philosophies and methods available for conducting a research project and then provides a justification for the empirical research method chosen for this research, namely semi-structured interviews with key informants within the fashion industry, encompassing retailers and manufacturers as well as textile and fashion consultancies.

Chapter 6: Data Analysis and Discussions – Country of Origin

In chapter six, the study presents the findings and discussion with regard to country of origin using an inductive thematic analysis approach which involves drawing meanings from the qualitative in-depth interviews from the fashion industry and comparing and contrasting these with the existing literature.

Chapter 7: Data Analysis and Discussions – Retail and Wholesale Brands

In chapter seven, the study presents the findings and discussion with regards to the blurring differences between retail and wholesale brands, starting with the definitions of retail and wholesale brands and how they have blurred, considering country of origin in the context. The study again uses an inductive thematic analysis approach, which involves the same process as in chapter five.

Chapter 8: Conclusion

In chapter eight, the study will provide a summary of the entire research, outlining the contribution to the knowledge and research models, illustrating the typology and outlining the practical managerial recommendations and avenues for future research.

Chapter 2: Country of Origin

2.1. Introduction

The UK clothing industry was revolutionised in the 1990s (e.g. Barnes and Lea-Greenwood, 2006; Dicken, 2015; Moore et al., 2007), and since then has been part of the global economy (e.g. via overseas manufacturing and sourcing). Due to the high demand for global sourcing (see Burt and Davies, 2010; Li et al., 2000), the fashion industry has become very complex, with different aspects of products/production located in different countries in order to gain lower labour cost (Parkvithee and Miranda, 2012).

This evolving global economy has made the notion of the “Made in [...]” label a fluid concept, where country of origin has been re-conceptualised as different constructs (e.g. country of manufacturing, country of parts, country of design and country of brand). Li et al. (2000) have suggested that apart from the “Made in [...]” label, other facets of country of origin can also influence consumers’ product evaluation processes (see also Ahmed and d’Astous, 2003; Chao, 1993). Thus, this chapter is divided into two sections. The chapter first provides a historical overview of the concept of country of origin, starting from the law in the United States (US), as this is where the concept of country of origin labelling initially began (Ha-Brookshire, 2012), followed by the legal definition and requirements under UK law (given the specific spatial context of this thesis). The chapter then identifies the different types of country of origin constructs and discusses any advantages and disadvantages linked to each.

The second section of this chapter focuses on the country of origin definition from consumers’ perspectives, providing in-depth information on how consumers perceive and associate with country of origin when making purchasing decisions. A review of current literature on existing theory is important to identify the relevant gaps and constructs that will be useful for developing an understanding from an industry perspective.

2.2. Historical Overview of the Country of Origin

The concept of country of origin was first introduced and endorsed in the United States in the 1890s, with the basic requirement for imported products (or their containers) to be marked with the foreign country of origin (Rohr et al., 1996). Prior to the 1890s, country of origin labelling was not considered a legal requirement, but rather used as a marketing tool to provide consumers with information about the goods and manufacturing process, while also acting to “protect” domestic producers (Ha-Brookshire, 2012; Morello, 1984; Rohr et al., 1996) enabling them to differentiate from international competitors. However, following World War I, a formal implementation of country of origin marking took place with the enactment of the Tariff Act of 1930, (Ha-Brookshire, 2012; Rohr et al., 1996; www.cbp.gov, 2008), making it compulsory for all products imported to the US to include country of origin information. The legalisation of the country of origin marking acted as punishment for the defeated countries, such as Germany, in order to help consumers identify and avoid products of the former enemy country, and thereby served to create a bad reputation for industries from the defeated countries (Al-Aali et al., 2015; Ha-Brookshire, 2012). However, Germany has had a long-standing reputation for excellence in engineering, and therefore the “Made in [...]” label had a positive impact, as consumers used this to identify and purchase German products. Furthermore, almost any imported product transformed or finished in the United States after the import was considered a domestic product, and thereby did not require marking under US law (Jones and Martin, 2012; Ha-Brookshire, 2012).

As per the tariff act of the 1930s, country of origin is defined as a country where the product was last subjected to an economic, commercial or technically significant manufacturing or assembly process (Rohr et al., 1996). However, the history of the “Made in [...]” theme goes back further with the UK’s Merchandise Marks Act of August 23 1887, making it a punishable offence to apply “any false trade description of goods, including description, statement or other identification, whether direct or indirect, and to clearly state the place of country in which the products or goods were made or produced” (Papadopoulos and Heslop, 2014). This Act was essentially introduced as a protectionist measure with the main objective of making it illegal to sell an article made in a foreign country, preventing words or marks that might lead the purchaser to believe that it was made in the UK (Papadopoulos and Heslop, 2014).

However, the legality of displaying “Made in [...]” is still not actually compulsory in the UK or other European countries, unless the products are footwear or children’s clothing (Gov.uk, 2013). Furthermore, “Made in [...]” was considered to have played an effective role in marketing strategy, creating awareness and developing positive attributes towards a country, especially in the US market, as the consumers’ evaluated the quality of the product based on where it was made (Chand and Tung, 2011; Ha-brookshire and Yoon, 2012; Ha-Brookshire, 2012). With country of origin labelling impacting on consumers’ purchasing intentions, many European countries considered this a unique selling point, and therefore displayed the marking onto their product categories (Al-Aali et al., 2015), notwithstanding the fact that it is not compulsory to display country of origin in many European countries, especially in the UK (Gov.uk, 2013).

2.3. Country of Origin Constructs

Country of origin, in general, is associated with the “Made in [...]” epithet, referring to the place where the product is manufactured or established (Chattalas et al., 2008). However, in the modern context of market globalisation and competition, firms are looking for cost advantages through proximity to end-user markets, cheaper labour and lower taxes (Hamzaoui and Merunka, 2006; Li et al., 2000). As a result, having a multinational country of origin in the product (e.g. manufacturing associated with developing countries), has been growing in recent decades, whereby material is sourced from one country, the product is designed in another, and manufacturing occurs in another (Hamzaoui and Merunka, 2006). Consequently, previous studies on country of origin have examined a range of country of origin constructs such as country of parts, country of design and country of manufacturing in response to the evolving global economy, whereby “Made in [...]” is no longer the same as the brand’s home country, with reference to consumer behaviour and purchase intentions (Hamzaoui et al., 2011; Magnusson et al., 2011; Samiee et al., 2005) (see table 2.1 on the next page).

Table 2.1: Overview of empirical studies on COO constructs

Authors (s)	Constructs	COO of brands	Sample	Products	Methodology	Results
Chao (2001)	The moderating effects of country of assembly, country of parts and country of design on hybrid products evaluation	United States and Mexico	360 junior and senior students from the U.S university	Television and Stereos	Quantitative, ANOVA Results	Country of assembly and country of parts only affects the product quality perception, and country of design only affects the design quality perception
Acharya and Elliott (2001)	Examining the effect of country of design and country of assembly on the quality perception and purchasing intentions	Australia, Japan, Korea, United States and Philippines	Sample of 1000 Australian students, in total of 275 responded	Tinned pineapple, automobile, and jeans	Quantitative, ANOVA variance	Country of assembly is more important than price and brands. COD is the second important for quality evaluation
Essoussi and Merunka (2007)	Consumers' product evaluation in emerging markets: Does country of design and country of manufacture matter, or does brand image matter?	Germany, France, Korea, Taiwan, Italy and Japan	Tunisian Market, 25 and 34 age group, 289 respondents in total	Television and Cars	Quantitative, component analysis	Consumers considered overall image of the country in which the product is manufactured (COM) more important than where the product is conceived (COD).
Samiee et al (2005)	Brand origin recognition accuracy. Its antecedents and consumers cognitive limitations	England, France, Germany, Italy, Japan and United States	480 respondents from 50 US States	Mercedes, Sony and Kodak	Quantitative, questionnaire	Brand origin recognition is largely based on consumers association with the brand name, with the languages that suggest country of origins. Results indicate that consumers have limited knowledge about the accuracy of the brand origin
Ha-Brookshire (2012)	Country of parts, country of manufacturing, and country of origin consumer purchase preferences and the impact of perceived prices	United states and China	76 participants	Textile and Apparel	Quantitative, questionnaire/ ANOVA	In this study, consumers are found to prefer and highly value apparel products made of U.S. raw materials despite their being manufactured in China.
Insch and McBride (2004)	The impact of country-of-origin cues on consumer perceptions of product quality: A binational test of the decomposed country-of-origin construct	Japan	109 students, Mexican and US	Television, Shoes, Mountain Bike	MANOVA	There are differences in consumer COO effects between style-related and purely functional products and between a prosperous, wealthy society and a relatively low-income, emerging market (especially

The sub-sections below provide a more in-depth review of these constructs: COM, COD, COP and COB, indicating the meaning and how consumers perceive each construct.

2.3.1. Country of Manufacturing and Assembly

The term country of origin is often associated with the final assembly of the product, the place or country where the product is manufactured or produced, up to the final stage which includes the final packaging, the product marking (Fetscherin, 2010; Inch and McBride, 1998), and where the end product is obtained. However, with many companies using a hybrid sourcing strategy, country of assembly has also been defined as a separate construct in the country of origin literature, referring to the place where the assembling process may take place, given that part of the components or the finishing may need assistance from another country (Li et al., 2000). For instance, part of the product may be partially or fully assembled, but the final sewing or stitching may take place in another country before reaching the final customer (Inch and McBride, 1998; Li et al., 2000). The existing marketing and country of origin literature suggests (e.g. Johansson and Nebenzahl, 1986) that the location of manufacturing affects the quality and the image of the brand, including multidimensional attributes such as reliability, durability, price, performance, workmanship, service quality and style. For example, Iyer and Kalita (1997) found that consumers consistently judged West Germany as the best country in which to manufacture automobiles and that moving production to West Germany would improve the image of all brands. On the other hand, moving production to a low image country may result in a loss of brand prestige. Therefore, according to authors (Bilkey and Nes, 1982; Iyer and Kalita, 1997), having manufacturing processes in a developed country contributes to a favourable brand image compared to manufacturing in an underdeveloped or newly industrialised country.

2.3.2. Country of Design

Country of design (COD) in general refers to the country where the product and industrial design are conceived or engineered (Jaffe and Nebenzahl, 2001; Li et al., 2000; Hamzaoui and Merunka, 2006). In other words, it is described as the country where the inspiration and the design construction (silhouettes and patterns) are developed. For instance, the

industrial design may be associated with the craft designs and ergonomics, prints, patterns and the silhouettes of the product design, with which the aesthetic, functionality or utility of the product may be associated (Li et al., 2000). Furthermore, the theory of industrial management and organisation suggests that design activities in the industry are associated with the product development process, which contributes to the firm's ability to develop and produce new products more quickly by minimising engineering changes, which in turn can delay production (Huang et al., 2008). As a result, it has been noted that the design elements make a contribution to cost, quality and timeliness in the industry (Fynes and De Búrca, 2005; Li et al., 2000).

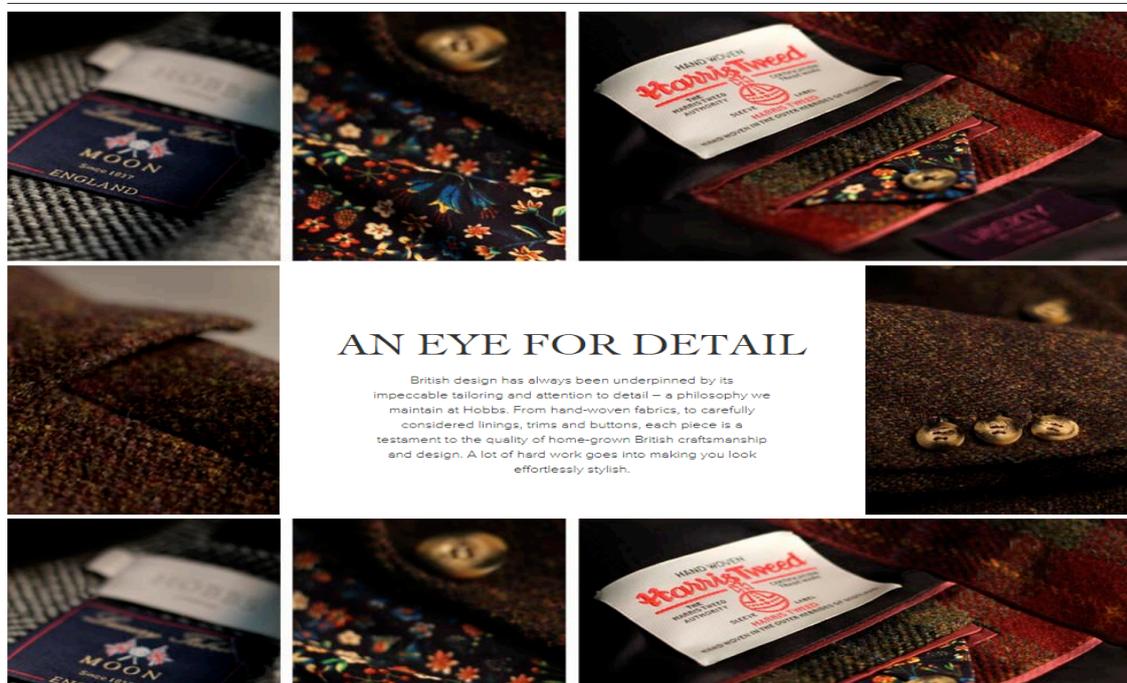
Some researchers have examined how country of design affects consumer perception and purchasing behaviour in a range of product categories (Acharya and Elliott, 2001; Ahmed and D'Astous, 2003; 2004; Chao, 2001; Hamzaoui and Merunka, 2006), and have found that consumers evaluate design quality, such as appearance, style, colour and so forth, based on a country's stereotypical perception (Chao, 1998; Chen, 2011; Li et al., 2000). In addition, the consumer-oriented COO literature also suggests that country of design associates with high symbolic values often linked to the industrialised (developed) country (Chao, 1998), especially in the developing countries (Hamzaoui and Merunka, 2006). This is deemed to have an important effect on the perceived quality of the product (Chao, 1998). However, Acharya and Elliott (2001) argue that country of design is deemed the second most important aspect in the evaluation of quality, following country of manufacturing and assembly, and that country of design impacts consumer decisions more than brand and price. As a consequence, this shows that the importance of country of design is dependent on the product category and the country with which the product is associated.

2.3.3. Country of Parts

According to Chao (2001), multinational firms continue to engage in global production and marketing activities, which involves sharing resources across national boundaries, making competition more intense. Additionally, Chao (2001) suggests that it has become common for companies to partner firms in another part of the world to perform engineering or design work and take advantage of location-specific factors such as low labour and material costs. In theory, country of parts refers to the country where the majority of the components used in the products are sourced. However, this construct has two aspects, one

that associates with the sourcing of the raw material (Ahmed and d’Astous, 2008; Chao, 2001), and the other associated with the construction of the fabric (Ha-Brookshire, 2012). For instance, raw material such as cashmere, cotton and other natural fibres are popularly outsourced from remote and isolated locations such as China, Iraq and Pakistan (Towers et al., 2013), with China being the global leading cotton apparel exporter (Ha-Brookshire, 2012) because of the skills and advanced technologies required. On the other hand, England is popular for Harris Tweed (see figure 2.1 below). However, based on the theory of consumers’ ability to process information (Han and Terpstra, 1988; Insch and McBride, 1998), country of manufacturing and country of parts matters to consumers, who use it to assess the quality of the product and prices (Ha-Brookshire, 2012; Ha-Brookshire and Yoon, 2012). For example, Ha-Brookshire's (2012) study found that consumers in the US seem to value apparel products made in their country using US cotton so much that they thought such products would be almost twice as expensive as a product made in China with Chinese cotton. Similarly, Ha-Brookshire (2012) also found that consumers favoured products made in China, but with US cotton, showing that preference for and perceived value of country of parts is also associated with the national reputation of the country.

Figure 2.1: Hobbs London British fabric innovation



Source: Hobbs.co.uk (2015)

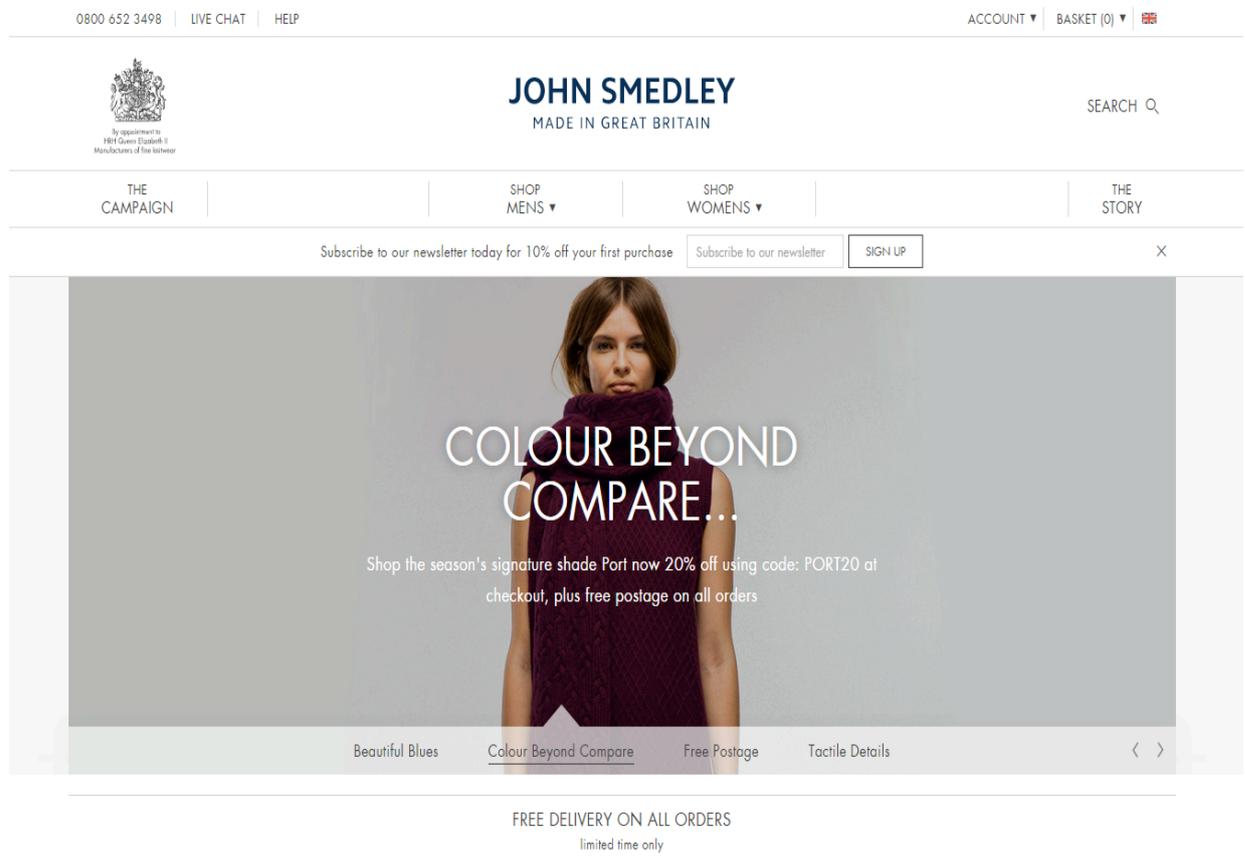
2.3.4. Country of Brand Origin (Branding)

Brand origin in relation to country of origin has drawn many scholars' attention in the study of consumer behaviour and marketing (e.g. Johansson et al., 1985; Schooler, 1965; Thakor and Kohli, 1996). For instance, authors (Balabanis and Diamantopoulos, 2008; Dikcius and Stankevicienė, 2010; Miranda and Parkvithee, 2013) have described country of origin as the home country of a brand. In other words, the country or the territory where the headquarters of the company that owns and markets the brand is located, or the place where the product or the brand was first established, popularised or distributed (Kavaratzis and Ashworth, 2008), regardless of where the product was manufactured (Samiee et al., 2005). For example, Magnusson et al. (2011) examined different product categories, including LCD TV brands, automobile brands as well as luxury and high street fashion brands (Burberry, Prada, Louise Vuitton, Ralph Lauren and H&M) to investigate consumer attitudes towards brand origin and whether country of origin has become irrelevant. Their study found that a product's country image of the brand's perceived origin significantly impacts brand attitude regardless of the objective accuracy of a brand(s) origin. However, country of origin in the high-street brand context is still very limited in the existing literature.

Moreover, Thakor and Kohli (1996) looked at brand origin with reference to communication, suggesting that it is an integration of the origin cues within a brand image (e.g. brand name or spelled out in an ad), whereby a marketer attempts to assert the nationality of a brand in promotional tools (specifically if the country possesses some natural resources or expertise), in order for a brand to achieve benefits from the association. A brand origin can be conveyed in a variety of ways, including the setting of the advertising copy, celebrity endorsement and design (e.g. Thakor and Kohli, 1996; Usunier, 2011). For example, a burgeoning high street brand, Topshop, produced a design collection that was inspired by the British configuration pioneers of the 1960s and 1970s: Zandra Rhodes, Celia Birtwell and Barbara Hulanicki. The collection in particular took its inspiration from Zandra's "witty, slightly ethnic and very romantic" signature prints and sheer fabrics, and from Celia Birtwell, reputed for her hand-drawn printed fabrics, making a contemporary legend referencing to the past, summoning these social values, and adding to the design renaissance of Rhodes, Birtwell and Hulanicki (Buckley, 2011). Likewise, such exclusive collaborations supported Topshop's cultural and symbolic capital and the

status of the brand in the UK fashion system (Buckley, 2011). However, according to Usunier (2011), the origin of the brand embedded in a brand name is considered to be the most effective marketing tool in the cognitive possession, more even than the “Made in [...]” label. This is because the country origin embedded in a brand name can be displayed clearly, which as a consequence is considered a visual cue that does not require much effort in marketing country of origin and developing brand association and trust (Usunier, 2011). For example, French Connection United Kingdom (FCUK), Donna Karen New York (DKNY), John Smedley: Made in Great Britain (See figure 2.2), Prince of Scotland and Ted Baker London.

Figure 2.2: John Smedley - Made in Great Britain



Source: Johnsmedley.com (2015)

Moreover, it has been noted that there are several branding techniques in which the origin of the brand can become complex and fuzzy (Chao et al., 2005; Usunier, 2011), for example, the use of foreign brand names by companies to make a brand more appealing and attractive to the international market or the use of international celebrities and models. An example is Superdry, where customers may be drawn to the Japanese aesthetics

featured with its brand name; however, the lifestyle brand is originally rooted with British heritage (e.g. Superdry Annual Report, 2015). Another example is the use of celebrities, with Nespresso “De-swissfied” by George Clooney (Usunier, 2011), David Beckham’s collaboration with the Swedish H&M, and Rihanna’s collaboration with British high street brand River Island (Mintel, 2013). In other words, the use of foreign brand names and international celebrity engagement has the ability to create misperception, whereby the consumers have limited knowledge about the origin of the brand, and therefore brand origin may not necessarily be considered as an important component (Magnusson et al., 2011; Samiee et al., 2005).

COO theory suggests that the origin of the brand is associated with the place, region or country to which the brand is perceived to belong by its target customers (Thakor and Kohli, 1996). Aiello et al. (2009) theorise brand origin, suggesting that it impacts a luxury brand’s image. This is because luxury brands are recognised for strong quality promises, symbolic, emotional characteristics and social and cultural values (see also Ahmed et al., 2002) which are often associated with countries that have a reputable country image. Given this, it is believed that consumers naturally have the ability to recognise and associate with the origin of the luxury brand; for example, Gucci as Italian, LV as French, Burberry for its British heritage, and Ralph Lauren from the US (Phau and Prendergast, 2000).

2.4. Country of Origin Definition from a Consumer Perspective

The literature on country of origin has been examined and defined in many different ways from a consumer perspective (see table 2.2); for example, the first study in the country of origin literature is regarded to be by Schooler (1965), who explored the biased images of products on the basis of national origin, and the attitude towards national sectors. His study found that the country of origin of a particular product has an effect on consumer opinion about the product. However, Schooler (1965) also found that the regional jealousies, suspicions and fears could impact on consumers’ recognition, attitudes and buying intentions. A similar theory was suggested by Schooler and Sanoo (1969) in their investigation on consumer perceptions of international products by contrasting regional versus national labelling. Their study found that consumers were biased against products from less developed countries, and therefore suggested the use of regional labelling rather than national labelling, for example, “Made in Europe” or “Made in Latin America”, and

found that the use of regional labelling was deemed effective as the goods did not appear to suffer from any bias response (Schooler and Sanoo, 1969). Additionally, significant differences were found towards products of foreign origin, for example, consumers with a higher level of education were found to be more favourable towards foreign products than consumers with a lower level of education, female consumers evaluated foreign products more highly than males, and younger consumers evaluated foreign products more highly than did older consumers (Schooler and Sanoo, 1969).

Equally, Piron (2000, p.308) defined country of origin “as the picture, the reputation and the stereotype that businessmen and consumers attach to products of a specific country”. This definition was theorised after Nagashima (1970), who used a longitudinal approach to examine “Made in [...]” product images among Japanese businessmen, comparing Japanese and American attitudes towards foreign and domestic products. The study found that the “Made in [...]” stereotypes differed between American and Japanese businessmen, which were associations of the images created in the minds of consumers by variables such as representative products, national characteristics, economic and political background and history and traditions of the country. Supporting the contention of Nagashima (1970, 1977), further confirmation that country image can be subject to change over time was provided in later decades by various authors (e.g. Koschate-Fischer et al., 2012; Roth and Diamantopoulos, 2009; Wang et al., 2012), describing country of origin as an informational cue which contains cognitive, affective and normative consumer attachment. In general, *cognitive* represents the “belief” or specific statement (knowledge, knowing) that consumers have towards a brand’s attributes and benefits; *affective* represents the attitude such as the motivational, emotional, perceptual, affective and combined evaluative response (feeling, perception) consumers attach to products or services; and *normative* represents the purchasing intention (Hawkins et al., 2004; Wang and Sun, 2010). Likewise, in a country of origin context, the cognitive effect characterises self-expression, a desire to match one’s self and product images (Piron, 2000), or make a rational use of country of origin, based on their knowledge on product and brand image. Affective impressions (favourable/unfavourable) involves attitudes towards country of origin associated with emotional attachment or the reaction consumers have towards the country image. Finally, normative is related to the symbolic association consumers may have with the origin, for example, association with the brand name and status.

Table 2.2: Definition (s) of COO

Author (s)	CONCEPTUALISATION OF COUNTRY OF ORIGIN DEFINITION
Schooler (1965)	First study in country of origin literature. Established that country of origin does exist, but did not investigate the strength and direction of country of origin effects
Schooler and Sanoo (1969)	Investigated consumers perception of international products by contrasting regional versus national labelling, e.g. Made in Latin and America.
Nagashima (1970; 1977)	Longitudinal approach taken to examining 'Made in [..]' product image. Findings indicate the dynamics rather than static nature of country image.
Thakor and Kholi (1996)	Introduced the concept of brand origin, defined as the place, region, or country to which the brand is perceived to belong, as by its targeted customers.
d'Astous et al (2008)	Studied product country image in the arts and found that they are affected by country and product familiarity, as well as consumer's openness to foreign cultures and home country bias. Countries more proximate to the participants home country were better evaluated, especially when the proximity factor played a significant role in the consumption of cultural products.
Bloemer et al (2009)	The study examined the halo-effect, summary effect, the product attributes and the default heuristic effect on country origin.
Usumier (2011)	Examined the shift from manufacturing to brand origin and found that linguistic cue lead to both incorrect and correct classification of brands in term of their national origin.
Shin et al (2012)	Studied 'Made in [..]' versus shopped from. Country of delivery origin effect and the role of perceived risk with reference to internet retailing, suggesting that internet retailers strive to post the optimal combination of communicative signals, whereas, internet customers struggle to attend and interpret the ever growing spectrum of cues.
Lee et al (2013)	"Bonds" and "Calvin Klein" Down-under: consumers ethnocentric and brand country origin effect on men's underwear, and found that there is no significant difference between high and low ethnocentric consumers in attitude towards underwear that are made in Australia and the USA. On the other hand, high ethnocentric consumers viewed domestically made and branded underwear as more durable, easier to care for, better priced, more colourful, more attractive, more fashionable, of stronger brand name, more appropriate for occasions, and more choices of styles.

2.5. Country of Origin Effect on Purchasing Intention

The influence of COO on product evaluation and purchasing intention has been the subject of much research dating back to the 1960s (Schooler, 1965). Previous studies have focused on various aspects of COO components and constructs, with particular emphasis on how consumer perceptions of products originating from particular countries influence consumers' buying patterns (Johansson and Nebenzahl, 1986; Paswan and Sharma, 2004; Pharr, 2005). These studies have found that with the world becoming a global market, there are suggestions of fading effects of country of origin on consumers' perceptions and buying patterns. However, the national stereotype image continues to play an important role in consumers' buying behaviour and decision-making processes (Han and Terpstra, 1988; Khan and Bamber, 2008; Roth and Romeo, 1992; Paswan and Sharma, 2004). The stereotyping process, in general, is described as a perception that one has of people as group members and not individual personalities (Oakes and Turner, 1990).

However, from the country of origin context, the stereotypical perception refers to the beliefs and attitudes consumers have towards a country, which are created by variables of national characteristics such as economics and political maturity, historical events and relations, culture and traditions, and the degree of technological virtuosity and industrialisation (Oakes and Turner, 1990). Likewise, representative products with situational characteristics (such as time available for product search and evaluation), stimulus (product-service category, big versus small ticket item), rival evaluation cues (price, store image, actual product attributes, etc.) (Piron, 2000), and finally, consumer characteristics such as social demographics, consumer ethnocentrism, consumer cosmopolitanism (Cleveland et al., 2009), global consumer orientation (Alden et al., 2006), product familiarity, product involvement (Josiassen et al., 2008), perceived risk, price mindedness and others (Koschate-Fischer et al., 2012; Speece and Nguyen, 2005; Usunier, 2003) are also considered to impact consumers' association with country of origin in their decision-making process and purchasing behaviour.

In addition, previous studies examining the effect of country of origin have indicated that consumers use country of origin as an informative indicator when evaluating the quality of a product. The theory on such effects measures two different types of informational cues:

intrinsic and extrinsic. Intrinsic cues are the psychological characteristics of the product, which cannot be changed without changing the actual product itself, and which relate to technical specifications such as, taste, style, shape, type of surface, materials used, weight, colour, quality and performance (Acebrón and Dopico, 2000). Extrinsic cues relate to the product attributes that are changeable, but are not physically part of product, such as price, brand name, country of origin, warranty, social environment, presentation, promotion, packaging, advertising and communications methods, determined by marketing and service efforts (Acebrón and Dopico, 2000; Rezvani et al., 2012; Lin and Chen 2006).

Likewise, Adina et al. (2015) and Laroche et al. (2005) suggested that consumers make personal conclusions on the value of the product quality, which includes the product's country of origin and country image, combined with other judgemental cues available on the product. Nevertheless, some authors (Chattalas et al., 2008; Verlegh et al., 2005; Veale and Quester, 2008) argue that extrinsic cues, including country of origin, are often used as the foremost primary cue when evaluating new products or products assembled or manufactured in a foreign country. This, for instance, often happens when intrinsic cues are either difficult to evaluate or simply not provided, and thus evaluating extrinsic cues is considered to be a more convenient means of evaluation (Dagger and Raciti, 2011; Powers et al., 2008; Yasin et al., 2007). However, Laroche et al. (2005) reported that consumers often use a product's country of origin or the product-country image (PCI) to evaluate the quality of the product (Hilman and Hanaysha, 2015). As a result, Lim and O'Cass (2001) have found that country of origin from a labelling context is found to influence consumer perception, reflected by two dimensions: perceptions of the quality and perceptions of the purchase value. Ultimately, Papadopoulos et al. (1990) denoted that country of origin influences consumer preference for products from one country over another.

2.5.1. Country Image

Nagashima (1970) described country image as a perception, or a stereotypical national image, consumers have in their minds in relation to a specific country. The image or the picture of the country can be shaped by consumers' knowledge of historical, economical or traditional aspects related to the specific country (Lin and Chen, 2006). Keller (2008) and Medway and Warnaby (2014) have suggested that the image of a country or "place" in

recent years can also be regarded as a brand, which marketers can use to greater or lesser degree. In this case, branding country image is often utilised by marketers to improve the perception of a place in the eye of external stakeholders (tourist, inwards and investors) and to boost the economic vitality and the stereotypical perception of a country. According to Medway and Warnaby (2014, p.153), “an important aspect of any branding process is the brand name”. Thus, to communicate the image of a country in a brand name, many marketing activities are currently responsible for using a specific location, taking the names of the places and incorporating them into the brand’s slogan or logo, for example Lipsy London, Ted Baker London, and DKNY. According to Medway and Warnaby (2014), the name of a given country embedded in a brand name can be associated with the economy, politics, technology, physical geography, culture, history, population and society of a given country (Cotîrlea, 2015; Martin and Eroglu, 1993).

In addition, previous studies examining country image from the consumer context have posited that country image can be linked to the halo effect, especially when the manufactured goods of a country are not recognised by consumers (see section 2.5.2 for definition and discussion of the halo effect), which consequently can result in negative or positive perceptible characteristics towards product attributes and brand image (Passow et al., 2005; Sharma, 2011).

As a result, consumer perceptions of overall country images can vary substantially in terms of the number, strength, and valence of the associations they make (Shimp et al., 1993). These connotations are held in the memory, especially when in association with the image of a country (for example, high technology and highly skilled labour for Germany, fashion and good taste for France, design for Italy, etc.). Consequently, the perception of the country of origin effect can be activated when consumers are familiar with or are provided with information with regards to the given product (or brand) that has been designed or manufactured in a given country (Hamzaoui and Merunka, 2006).

Ultimately, Wang et al. (2012) suggested that the image of a country is deemed to be one of the most effective cues, acting as a review construct in consumers’ purchasing behaviour. This is especially valid if consumers have previously had a memorable experience with the country of the product or a brand associated with a particular country.

In summary, various researchers have argued that consumers' association to the brand or product is entirely associated with the country in which the product is finally made, and that country image contributes to this association in forming perceptions and beliefs with regards to the product evaluation (Bilkey and Nes, 1982; Han and Terpstra, 1988; Hunjra et al., 2015). It has also been suggested that these associations can be positive or negative, based on the country image and customers' knowledge; for example, the British industry was once known for industrial engineering, but today, it is known for British high street retailing and food services. Similarly, when thinking about French fashion brands, consumers naturally associate them with high status, with France re-owning the fashion industry. Similarly, with cars, Toyota and Suzuki are naturally associated with Japan in the minds of consumers (Pappu et al., 2006). As such, consumers' association with respect to Japan is also positive, again, due to the high ranking in the product category, with Japan having a recognisable image of design and a high value of workmanship (Erdem et al., 2006; Huang et al., 2010; Roth and Romeo, 1992).

Consequently, some retailer brands have adopted this as a branding strategy to increase the brand position in the market; for example, consumers naturally associate Superdry with Japan, due to the Japanese writing incorporated within the brand's slogan or logo. Although this strategy is considered appealing to the retail industry, consumers may view it as misleading once they are made aware of its true origin, which as a result can impact the brand image in a negative manner (Kapferer, 1996; Usunier, 2011). On the other hand, the US and Canada are considered to be the most high-ranking countries with respect to beauty and fashion accessories; for example, fashion brands such as DKNY, Michael Kors and Coach are thought to have a high level of association. Lastly, Korea, China, India and Pakistan are thought to be the lowest rated for country image; however they are most popular with regards to manufacturing fashion products. This shows that country image and country of origin have the ability to influence the customer opinion on the quality of the product (Bilkey and Nes, 1982; Papadopoulos and Heslop, 2014).

Additionally, researchers have suggested that to strengthen the strategies and to encourage the positive aspects of product category and country image, marketers can use a range of brand message strategies and programmes, from basic advertising to the use of place marketing in the brand name (Dagger and Raciti, 2011; Pappu et al., 2006). Ultimately, Zeugner-Roth et al. (2008) contributed that effective brand messages may help to gain

positive recognition within branded products.

2.5.2. Halo and Summary Construct

Several studies have proposed that the country of origin phenomenon may be explained as either a “halo” or a “summary construct” (Erickson et al., 1984; Han, 1989). According to Chiou (2003), the halo effect refers to consumers using country of origin or country image as an attribute for product evaluation, when the true quality of the product is not traceable before trial (Bilkey and Nes, 1982). For example, if UK consumers were less familiar with cars made in France, then they would naturally infer the product attributes using the general image of French-made products, and thus rate the product based on their perception of the country as a whole (Kotabe and Helsen, 2009). Alternatively, Han (1989, p.34) explains summary construct as:

“...a file of information about various brands from a country that consumers develop over time, store in their memory in the form of overall evaluations of products from the country and retrieve readily when evaluating the brands.”

Authors (e.g. Ahmed et al., 2012; Niss, 1996; Tigli et al., 2010) indicate that country of origin cues have a symbolic and emotional influence on consumers and are generally associated with quality and country image. It is thought that both concepts, as mentioned above, are associated with the image of the country, being specific to product categories since not all the products from the country are seen to have equal quality. Moreover, when consumers have limited knowledge about the product, they use country image as a product cue to form individual beliefs regarding the product’s attributes. This plays the role of a “halo” effect, in which country image directly affects the overall evaluation of the product through the consumers’ beliefs and perceptions regarding the country (Johansson et al., 1985). In contrast, when consumers are familiar with a country’s products, a summary construct model operates in which consumers develop a country’s image from its product information, which then indirectly influences product perception (Han, 1989).

2.5.3. Patriotism and Ethnocentric Behaviour

Authors (Chen, 2011; Han, 1988; 1990) have suggested that the rational or cognitive factor of country of origin is the perceived quality of product evaluation, which is evaluated based on technical, advancement, prestige, workmanship, economy and service. However, Chen (2011) and Moon and Jain (2002) argue that consumers' choices of products are often influenced by affective factors such as consumer patriotism and level of ethnocentrism. Studies have found that consumers' patriotism and ethnocentrism influence the decision-making in favour of domestically manufactured brands and products (Sharma, 2011; Zatepilina-Monacell, 2014) with a willingness to pay more or make extra effort to purchase domestically made products, or make moral choices when purchasing domestically made goods (Sharma, 2011).

Patriotism is described as strong feelings of attachment and loyalty that an individual may have towards their own country, without the matching antagonism towards other nations, and nationalism (Balabanis et al., 2001; Han, 1988; Tong and Li, 2013).

According to (Myers, 2015, p.203) in general, ethnocentrism:

“...represents the universal proclivity for people to perceive their own group as the centre of the universe, to interpret other social practices from the perspective of their own group and to neglect persons who are culturally dissimilar while blindly accepting those who are culturally like themselves”.

In other words, consumers' ethnocentric attitudes relate to individuals judging another culture by the values and standards of their own culture, associating with variables such as ethnic origin, cultural practices and religion (Myers, 2015), which influences consumers when buying foreign-made products. The concept of patriotism and ethnocentric behaviour is therefore associated with the emotional and symbolic attachment that consumers have with their own traditional customs, symbols and values associated with their national reputation.

Furthermore, authors (Chen 2011; Han and Terpstra, 1988; Lee et al., 2013; Rezvani, et al., 2012) have suggested that consumer ethnocentric and patriotic behaviour relates to consumers' willingness to sacrifice purchasing intention in relation to foreign brands for

the purpose of feelings of morality and responsibility towards products manufactured in their own country. Consumers, as a result, provide such behaviour towards domestically made products despite being aware that their own country may not have sufficient skills and technologies to provide quality or promising products (Rezvani et al., 2012). Sharma (2011) adds to this notion that products manufactured in developed countries are thought to have better quality when compared to developing countries, due to the generally more stable economies and more advanced technologies. Consequently, patriotic and ethnocentric consumers consider purchasing international products and brands to be immoral, because it adversely affects the local economy through, for example, increased unemployment, and because it is considered unpatriotic behaviour (Lee et al., 2009; Shimp and Sharma, 1987).

Thus, it is thought that consumers' patriotic feelings can have both positive and negative affects towards purchasing intentions. Consequently, authors (Chen, 2011; Han, 1988; Shimp and Sharma, 1987) explain that patriotic consumers have the potential to spontaneously look for country of origin information and evaluate domestic products more favourably than imported ones. In relation to ethnocentric tendencies, patriotism and national animosity have been shown to be antecedent of ethnocentric tendencies, which contains emotional factors influencing consumer attitudes towards different country products as well as purchase intentions (Balabanis et al., 2001; Sharma et al., 1995).

2.6. Chapter Summary

Chapter 2 has reviewed the literature on country of origin, providing the theory on the legal definition with reference to the US, as that is where the legality of the "Made in [...]" label originally began, followed by a legal definition with respect to UK law. In addition to this, the chapter has also covered many areas, including the different components and constructs (e.g. country of manufacturing, country of designing, country of parts and country of brand origin) that have made the understanding of the country of origin concept fluid in the existing literature, and the influence it has on consumer perception and behaviour. It was found that the country of origin effect on consumers varies depending on consumers' preferences, stereotypical perception, cultural values, beliefs and association with the country image. Therefore, in the competitive fashion industry, both retail brands

and wholesale brands face a new scenario where country of origin constructs can be used as branding strategy as a result of growth within the global economy. For instance, to develop a brand image and brand identity, both retail brands and wholesale brands can use a range of strategies, such as incorporating country, location or city name within a brand name, slogan or a logo (Kavaratzis, 2005; Kotler and Gertner, 2002; Medway and Warnaby, 2014; Thakor and Kohli, 1996). It is predicted that this is because consumers associate with different aspects of country of origin; for instance, Samiee et al., (2005), highlighted the importance of country of brand origin associated with the location of the brand's headquarters, or the country with which consumers associate a brand regardless of where the product is manufactured. For example, if a brand name says "Ted Baker London", consumers would naturally assume that the product is from the UK. Furthermore, it is also thought that the association with country of origin varies depending on different countries. For example, consumers in the US may associate with country of parts when evaluating the quality of a product or, otherwise, make an association with a country.

However, the relevance of country of origin in the context of retail brands versus wholesale brands, and its impact on the blurring between the two, is lacking in the existing literature. Therefore, the next chapter provides theory of branding, covering a range of areas including the different dimensions of brand knowledge, brand identity, and identifying different types of facets, segmentations and concepts that allow retail brands to differentiate from wholesale brands, or a wholesale strategy in effect. This will contribute to identifying and analysing the blurring factors between retail brands and wholesale brands and the impact country of origin has in the context.

Chapter 3: Branding

3.1. Introduction

Given the development of own brand strategy, globalisation and internationalism in the fashion industry, retail brands and wholesale brands are constantly evolving their branding strategies in order to remain competitive in the growing and developing fashion industry. Consequently, both retail brands and wholesale brands are compelled to create branding strategies not only via product merchandise but also through the service and other brand values (Varley and Rafiq, 2014).

Branding in general is considered a distinctive approach to creating recognition and differentiating an organisation from its competitors (Aaker, 1991; Doyle and Stern, 2006), e.g. creating the brand name, sign, symbol, design or any other feature for a product or service that reflects the brand's values, mission and personalities associated with them (see also Aaker, 2012; Sullivan and Adcock, 2002).

According to Elliott et al. (2011), a brand is a label, which has designated ownership by a firm that a consumer experiences, evaluates and has feeling towards, developing associations with the perceived values. Elliott et al. (2011) also explain that developing brand values that reflect the brand image is important in terms of the impact it has on the consumer's perception. In part, this is because brands exist in the minds of the consumers, and as a consequence, the management of the brand is all about the management of perceptions and associations (Elliott et al., 2011; Kapferer, 2008). Accordingly, the values and emotions symbolised by the brand become the key elements of differentiation strategies, allowing retail brands and wholesale brands to build brand trust and loyalty towards the product and service (Aaker, 1991; Keller, 2002; Sullivan and Adcock, 2002).

This chapter will highlight the signification issues within branding before identifying different strategies between retail brands and wholesale brands. As a result, the chapter is divided into two sections. The opening of the chapter aims to discuss the existing theories with specific reference to branding. It begins with a general discussion and the definition

of branding before discussing the attributes of brand knowledge, e.g. brand association, brand image and loyalty; and brand identity, e.g. brand name, colour and logo. This chapter will then lead into a discussion about retail brands, in the context of product and process, and wholesale branding, identifying and analysing the concept and strategies. Discussion of retailing and wholesale brands in the fashion context is important because the study's main concern is the relevance and implication of the country of origin in fashion retail brands and wholesale brands and the fact that the differentiation between the two has blurred.

3.2. Definition of a Brand

According to Littler (2006) and Millman (2012), a brand is described as the unique label or mark of a manufactured product, and is derived from the old Norse word '*Brandr*', meaning '*to burn by fires*'. The concept of branding first came from the Ancient Egyptians, who marked their livestock with hot irons in order to express ownership and differentiate them from others, but the process then spread widely across Europe. As a consequence, this developed interest among many organisations from a variety of different industries, such as service-profit chains (e.g. Chang and Liu, 2009; Gummesson, 2012; Melewar and Alwi, 2015), the hotel industry (Kayaman and Arasli, 2007; Kam et al., 2013), social media (Kim and Ko, 2012) and the luxury fashion industry (Li et al., 2012), embracing satisfaction, loyalty and profitability. Kapferer (2008) argues that various authors (e.g. Aaker, 1991; Crainer, 1992; De Chernatony and Riley, 1998; Kapferer, 1992; Keller, 1993, 1998) have provided numerous concepts and discussion on the definition of a brand (see Table 3.1 below) and the measurement of brand equity. For instance, Aaker (1991) defined brand as a distinguishing name and/or symbol intended to identify the goods or service of one seller as opposed to those of competitors. On the other hand, a brand is also perceived as a strategic asset available to a company that can provide long-lasting competitive advantages (Kapferer, 2008). In addition to this, Kapferer (2008, p.11) provided another definition, whereby a "*brand was conceptualised as a set of mental associations that added value to the product itself*" or brand equity, in effect. In part, brand equity is described as an approach that measures the impact a brand has on the mental association (Keller and Aaker, 1992). Consequently, psychology became the dominant theory in marketing, which is associated with holding a "*share of the mind*" (Kapferer, 2008, p. 11). In other words, building a brand in the psychological context means linking a

name to a single consumer's benefit and mere repetition of advertisement, influenced by television commercials. Table 3.1 presents the brand definitions of various researchers.

Table 3.1: Brand Definition (s)

Author (s)	Brand Definition	Definition and characteristics of a brand
Aaker (1991); AMA (1960)	Brand as a name or a logo	A name, term, sign, symbol, or design, or a combination of them, intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors
Broadbent and Cooper (1987); Crainer (1995)	Brand a legal instrument	Defines brand as a legal statement of ownership, or adopting a mark to designate a legal ownership.
De Chernatony and Riley (1998)	Brand as a company	With the growing competition from own-labels and increasing marketing cost, an instantly recognisable corporate identity (e.g. name and image) becomes important. This is where; the product lines and services are named under the corporate name, and thus becomes an extension of the corporates personality and equity.
Aydin (2014) and De Chernatony and Riley (1998)	Brand as a shorthand	It is believed that for consumers, brand acts as a shorthand device of functional and emotional features, enabling swift recall of information in memory, especially when making associations and purchasing decisions.
Kapferer, 1992	Brand as an identity system	Defined in holistic terms, explaining that a brand is not a product, It is the essence of a product, meaning, and its identity in time and space, including the strategy and consistent brand vision.
De Chernatony and Riley (1998); Keller (1993); Zhang (2015)	Brand as an image in consumers' mind	With reference to cognitive psychology, a brand is described as images in consumers' minds of functional and psychological attributes, or the association of a brand in consumers' mind.

Source: Crainer, (1995); De Chernatony and Riley (1998) and Kapferer, (1992, 2008).

Due to the importance of brand equity in branding literature (see also Table 3.1), the next section will discuss the theory of brand equity in more detail.

3.2.1. Brand Equity

According to Aaker and Biel (2013), the concept of brand equity was born in the 1980s, and was popularised in the 1990s by Aaker (1991), Srivastava and Shocker (1991) and Kapferer 1994), being of interest to many different industries (see section 3.2, above). While the literature on the subject includes numerous concepts and discussions of the definition of brand equity and its measurement, there is mutual agreement that brand equity is related to the value adding process acquired by means of consumers' association

with the brand name, and some sort of utility in relation to the competitive brands, as perceived and expected by the consumers (Boo et al., 2009; Kavartzis et al., 2014). In addition to this, Pappu et al. (2006) have suggested that, similar to the concept of brand name, the country of origin of a product is also considered an extrinsic cue that also influences consumers' perceptions and brand equity. Thus, this leads consumers to a cognitive development, resulting in an association in the minds of consumers (Aaker, 1991; Keller, 1993). For instance, Pappu et al. (2006) suggested that consumers may associate countries such as France and Spain with intangible attributes, such as reliability and durability, which may result in influencing the consumer-based equity of a brand for a specific country. In other words, brand equity is associated with the value that is added through the marketing of products and services, with the distinctive brand name and country of origin, through to the products, retail and to the consumers (Aaker and Biel, 2013).

As a result, it can be hard to separate the concept of brand equity from the concept of brand value (Kavartzis et al., 2014), and thus, the brand equity view has been proposed from a variety of perspectives (e.g. Erdem and Swait, 1998; Keller, 1993). For example, some authors (Chernatony et al., 2010; Keller, 1993; Yasin et al., 2007) determined brand equity using psychological testing of customer memory, suggesting that it contributes to creating brand value in the consumer's mind, by offering a promising brand name and brand performance. In this sense, it involves consumers paying a premium price to purchase a good with a name or symbol, in comparison to a non-brand (Aaker, 2012; Erdem and Swait, 1998; Kapferer, 1996).

On the other hand, Aaker (1991) has proposed a framework from a managerial perspective, reminiscent of financial circles, referred to as a product market, which includes, "the set of assets (and liabilities) linked to a brand's name and symbol that add to (or subtract from) the value provided by a product or service to a firm and/or that firm's customers" (Aaker, 1991, p. 16). These assets include: brand awareness, brand loyalty, perceived quality and association linked with the brand name, colour or symbol, which will be expanded further in the next sections (3.3 and 3.4) as part of brand dimension and brand identity. The American Marketing Association defined brand equity as the value of a brand, based on consumers' opinions, attitudes and behaviours towards the positive brand attributes, and thus a favourable result of brand use (AMA, 2006; Kavartzis et al., 2014; Kotler and

Armstrong, 2010). Erdem and Swait (1998) proposed a framework from the signalling perspective, explicitly considering information economics, which companies can use as a brand signal for conveying information in a marketplace (Spry et al., 2011). Brand signalling can be characterised by insufficient and distorted information (Erdem and Swait, 1998; Spry et al., 2011). Erdem and Swait (1998) found that a brand's credibility - which is associated with how effectively information is conveyed, and how truthful and dependable the information is considered - increases perceived quality, decreases information cost and increases customers' (expected) utility and loyalty. As a consequence, the framework can be associated with brand value (Kim et al., 2003), whereas firms' signalling and customers' attitudinal associations are its core, and therefore can be linked with customer-based brand equity (Keller, 1993).

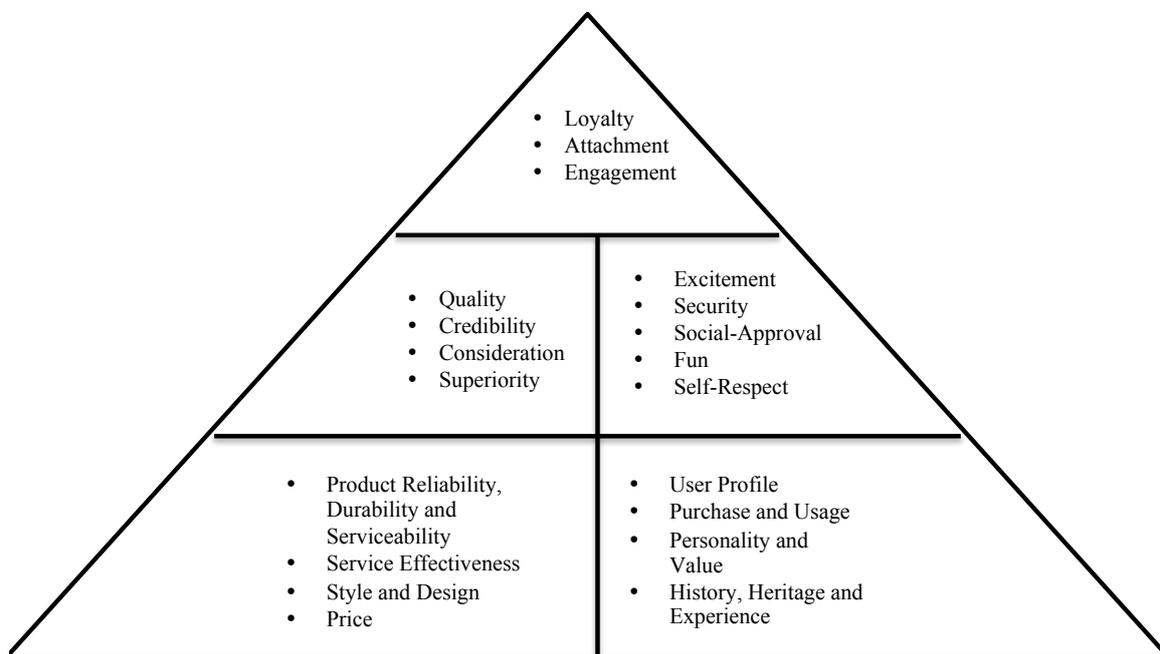
In response to the above-mentioned relations between financial and emotional elements, Kim et al. (2003) provided a marketing and financial perspective on the evaluation of a global brand, suggesting that, ultimately, the brand value is derived from consumer-based brand equity, which associates the words and actions of consumers with a decision-making process, commonly relying on the attributes considered important in a brand (Keller, 1993). Therefore, as Kavartzis et al. (2014, p. 227) have stated, "brand equity is deemed as the driving force of the market share growth and brand profitability, which is based on brand perceptions (consumer-oriented brand equity)".

As a result, typically all definitions either implicitly or explicitly rely on the structure of brand knowledge. In other words, the real equity of a brand is in the association, images, belief, trust, loyalty behaviour, experiences and so forth that exist in the minds of consumers (Keller, 1993). Brand knowledge, in this case, is associated with consumer behaviour towards a range of recourses; a brand is used to develop a brand identity (Yasin et al., 2007). The association furthermore leads to trust, with an outcome of brand loyalty, increasing brand equity and future earnings, such as brand image (Aaker, 1991; Bibby, 2009; Kotler and Armstrong, 2010).

3.3. Dimensions of Brand Knowledge

Brand knowledge is defined as a descriptive and evaluative brand-related information process, which is an individualistic inference about a brand stored in the mind of a consumer (Alimen and Cerit, 2010). It includes a set of notions, such as brand awareness, and brand image, relating to a range of information such as awareness, attributes, benefits, images, opinions, feelings, attitudes and experiences towards a brand's establishment, and thus, it directly impacts consumers' responses (see Figure 3.1) (Hoeffler and Keller, 2003; Keller, 1993). In other words, brand attachment derives from rational and emotional brand evaluation, which requires brand awareness (Chandon et al., 2009; Müller and Chandon, 2003). As a result, it is indicated that brand knowledge is based on a constant communication with consumers that produces an understanding of the product and service. Consequently, this section provides the basic theory on the dimensions of brand knowledge, derived from the existing literature of branding, to develop a deeper understanding of consumer experience and attitude towards the concept of branding.

Figure 3.1: Sub-dimensions of brand building pyramid



Source: Keller (2001)

3.3.1. Brand Awareness

Researchers use the term ‘awareness’ extensively in marketing research to determine a brand’s performance and its marketing effectiveness. Several authors have provided the definition of brand awareness (Aaker, 1991; Brakus et al., 2009; Hoyer and Brown, 1990; Keller, 1993), suggesting it as a customer’s ability to recognise and recall a brand from its product category, when customers are exposed to specific brand-related stimuli, such as brand name, typeface, slogans, mascots, and brand characters. Similarly, Pappu et al. (2006) posit brand awareness from a retail context, defining it as consumers’ ability to recognise or recall a retailer (not merely knowing the retailer) when exposed to the relevant retail category in which the retailer competes, and to link products sold under the retail brand’s name (Homburg et al., 2010; Keller, 1993; Sen, 1999). In other words, brand awareness is described as a process in which potential customers are made aware of the categories that the brand may be competing in (Romaniuk et al., 2004). This provides learning advantages to a brand and influences the consumer decision-making process (Chi et al., 2009; Huang and Sarigöllü, 2012; Keller, 1993). For instance, Pappu et al. (2006) have suggested that consumers who are highly satisfied with a retailer or brand may readily recall the brand name, compared to those consumers who are less satisfied with the product or retail service. However, it has also been suggested that consumers who are strongly dissatisfied with their experience regarding the product brand or retail brand may exhibit a higher level of retail awareness, due to their dissatisfaction.

3.3.1.1. Brand Recall

Research on brand awareness has referred to brand recall as the degree to which a brand is retrieved from a memory, either spontaneously, or with some brand and product cue (Aaker, 1991; Krishnan et al., 2013). For example, Romaniuk and Sharp (2004) proposed a TOM (top of mind) concept with specific reference to brand salience, whereby a customer recalls a brand associated with a specific product category in the customer’s purchasing situation. Thus, authors (e.g. Aaker, 2012; Chanavat and Bodet, 2009; Keller, 1993; Romaniuk and Sharp, 2004) posit that brand recall can also be associated with brand familiarity.

The concept of brand recall can be associated with the notion of ‘summary construct’ on country image, as defined in more detail in Chapter 2, whereby a brand may be recalled for its positive (e.g. long-lasting, comfortable and lower price), neutral or negative (wear and tear, damaged and poor service) attribute(s) (French and Smith, 2013). Therefore, this concept usually takes priority in a purchasing decision, in which a consumer compares a product with other brands, as to when they can recall positive and negative attributes, in the presence of the other brands (Aaker, 1991, 2012; Bibby, 2009; Keller, 1993). For instance, Rimkute et al. (2016) found that consumers who are exposed to scented products are likely to recall more attributes than consumers who received unscented products. Similarly, when considering high street fashion, consumers do not instantly associate premium branded products with a retail store. This is because, based on consumers’ stereotypical views, premium brands ought to be found in a big chain department store or independent store, whereas high streets have a perceived image of providing high volume products to the mass market, at lower prices, in dedicated retail stores (e.g. Goworek and McGoldrick, 2015).

3.3.1.2. Brand Recognition

Brand recognition “relates to consumers’ ability to compare between a previously encountered brand and new brands, based on prior exposure to brand as a cue” (Keller 1993, p.3). For example, Hogg et al. (1999) examined brand recognition, preference formation, choice processes and symbolic consumption in young consumers, and found that brand recognition clearly emerges in all consumer age groups, notably for sportswear manufacturers, with clear evidence of the recognition of brand names, logos and slogans. Similarly, considering sportswear manufacturers, brands are often recognised for their popularity amongst their target audience, style and their functional usage. Therefore, brand recognition is considered to be one of the most important factors in developing a brand’s image, and thus requires heavy marketing and communication by the marketers. As a consequence, marketers use a range of communicative methods, such as bold logos, bright colours, and unique packaging to communicate a product’s attributes, until the brand name is successfully established (e.g. Simonson and Schmitt, 1997). These brand embellishments later influence brand perception and attitude, and further affect the brand choice and loyalty (Aaker 1991; Chi et al., 2009). As a result, brand recognition is

considered to create positive or negative effects towards a brand name, based on consumers' perceptions, preferences and attitudes. As such, recalling and recognising a brand for its positive attributes is considered important in making effective purchasing decisions (Chi et al., 2009; Macdonald and Sharp, 2000; Macklin, 1996).

In the fashion industry, the global competition of the consumer market is continually increasing, and therefore, marketers are continually seeking new strategies that cause brand awareness, and capture both the interest and loyalty of consumers. The development and implementation of an effective brand message are therefore extremely important in the fashion industry (e.g. Aaker, 1991; Hoeffler and Keller, 2003; Huang and Sarigöllü, 2012; Keller, 1993). To create brand awareness in the fashion industry, the marketing team of an organisation must identify the customers' needs and desires, and adopt an effective marketing strategy in order to attract new and existing customers. In order to increase customer loyalty and improve a brand image, fashion brands must firstly create a visual brand identity, which includes using a distinctive brand name and a series of promotional methods, such as distinctive packaging, association with events, collaborating with other brands, and finally online promotion and print editorials, reflecting the value of the brand and the segmented market (Dillon, 2011; Jackson and Shaw, 2008; Lea-Greenwood, 2013). However, when making purchasing decisions, a consumer firstly associates with the brand name, which leads to other brand experiences. Brand recognition, therefore, relates to a consumer's ability to recognise between a previously encountered brand and new brands, based on prior exposure to the brand as a cue (Gerber et al., 2014).

3.3.2. Brand Image

In general, brand image is defined as "a set of perceptions about a brand, as reflected by the brand associations held in a consumer's memory" (Hsieh and Lindridge, 2005, p.15), reflected by a set of beliefs and perceptions held in the mind of a consumer (Bibby, 2009; Hoeffler and Keller, 2003). Scholars (e.g. Bhat and Reddy, 1998; Grace and O'Cass, 2002; Keller, 1993) have conceptualised brand image as comprising both functional and symbolic aspects, whereby brand image is firstly developed using the specific, intrinsic characteristics of brand attributes (e.g. price, design, and quality), while the latter is established using the extrinsic characteristics (e.g. reputation, atmosphere) that satisfy a

customer's higher-level needs. Koubaa (2008) has described three kinds of human beliefs, which reflect a brand's image: descriptive, informational, and inferential. The descriptive beliefs derive from direct experience with the product. Informational beliefs are those influenced by external sources of information such as advertisements, friends, and word of mouth. Inferential beliefs are those formed by making inferences (correctly or incorrectly) based on past experience, as this experience relates to the current stimuli. A brand image is therefore developed through a set of reasoned or emotional perceptions, which consumers attach to a specific brand, and which consists of functional and symbolic brand beliefs (Dobni and Zinkhan, 1990; Koubaa, 2008). For example, Koubaa (2008) found that frequency information affects familiarity and then affects reputation, which, in turn, affects image in a consumer's mind. Additionally, it has been noted that previous researchers have revealed significant effects of country of origin information on the brand image (Ahmed and d'Astous, 1996; Al-Sulaiti and Baker, 1998; Koubaa, 2008). For example, in Chapter 2, section 2.5, country image is described as the overall perception a consumer forms about a particular country. These perceptions can be due to a range of factors, such as political and social factors, personal experience, personal knowledge, culture, and the influence of media, and the perceptions can be transferred onto the brand image (Roth and Romeo, 1992).

Sullivan and Adcock (2002) have described an image as a set of "tangible attributes and subjective perceptions, while all marketing cues help to develop a brand" (p. 122). However, it is actually the customer who gives life to a brand from his/her set of beliefs. Consequently, a brand image can be developed from the customer's experience, marketing communication, and/or word of mouth. Furthermore, Bibby (2009, p.41, cited in White, 2003, p.13) elaborated on the definition of brand image in more detail, stating that "brand image is the complete mental picture of a brand held by those consumers who are more or less aware of it".

To explain brand image further, Tong and Li (2013, p.2, cited in Keller 1993, p.3) provided a basic definition of a brand image, which is: "the perceptions about a brand reflected as associations existing in the memory of the consumer". In other words, brand image is a cognitive concept and a mental imprint of a brand in the minds of consumers that allows consumers to recognise the uniqueness of a product and also to differentiate the

product from those of competing brands (Aaker, 1996; Kapferer, 1996; Schnittka et al., 2012). For example, Spanish Brand 'ZARA' may have a positive image for providing classic style products, but could also have a negative image due to sizing and fit issues. Keller (1993) also explains that brand image incorporates a consumer's association with the brand attributes, brand benefit and brand attitude, which are set to play an important part in the buyer's decision-making process. From a country image context, Kim (2012) and Koubaa (2008) suggest that consumers have a positive image of brands that are manufactured in developed countries, in comparison to brands manufactured within emerging markets.

3.3.3. Brand Association

In general, brand association is described as anything linked in memory to a brand (Aaker, 2009). Aaker (2009) also explains that associations not only exist but also have a level of strength, which can be stronger depending on the exposure and experience with a brand. Thus, brand association represents key predictors to loyalty (Doyle and Stern, 2006; Doyle et al., 2013). The associative factors feature beliefs, feelings, and images that are stored in the minds of consumers as long-term memory, and thus, can also be defined as a subcomponent of memory which is permanent, virtually unlimited in storage capacity, and well stored (Aaker, 1991; Biscaia et al., 2013; Keller, 2010).

As a result, such an association helps an individual to determine the perceived attractiveness of the brand and to ultimately boost the brand's salience and likelihood of consumption (Romaniuk and Nenycz-Thiel, 2013; Romaniuk et al., 2004). For example, consumers may associate luxury products with being exclusive, having a high status and quality (Atwal and Williams, 2009). Such association with the brand is due to the price, brand positioning, and the quality that the brand name offers. For this reason, authors (Doyle et al., 2013; Keller, 1993; Romaniuk and Nenycz-Thiel, 2013) have suggested that brand associations represent key indicators to behavioural patronage or brand usage. In addition to this, Río et al. (2001) highlighted the use of place in a brand name obtaining different associative advantages, such as emotional association with a country, and thus, brand association with a particular country results in brand loyalty and trust. For example, the use of London in a brand name is often associated with the capital of fashion in the minds of consumers, and thus, London associative brand names may achieve favourable

consumer responses as opposed to other brand names. However, Hwang and Kandampully (2012) conceptualised brand association as generating different impacts on both functional and symbolic aspects, which further affects the construction of a brand image. For example, consumers may prefer to associate with a product that uses 100% cotton, for the purpose of ease and comfort, or associate with high-end luxury brands due to the high-quality material used in the production of those products. Therefore, cotton products may be favourable due to the comfort, whereas high-end luxury may be favourable due to the quality and long-lasting performance of the fabric. As a result, association with a brand can be due to its utilitarian and experiential benefits, generated from quality perceptions related to a geographic origin, and thus lead to brand association (Aaker, 1991; Keller, 1993; Río et al., 2001).

Furthermore, authors (Aaker and Biel, 2013; Grace and O’Cass, 2002; Thakor and Kohli, 1996) assert that brand association can comprise several different cultural meanings; for example, consumers’ association with the brand can be based upon a demographic segment such as maleness or femaleness (the *gender* meaning), social standing (the *status* meaning), nationality (the *country* meaning), ethnicity (the *multicultural* meaning), age group and so on. Consequently, brand association is stimulated by a range of sources used to create awareness and brand communication, which affects consumers’ attitudes, experiences, preferences, and thus loyalty, towards a brand (Ghodeswar, 2008).

3.3.4. Brand Trust

Over the past few decades, various authors have examined brand trust from a marketing and brand context (e.g. Gecti and Zengin, 2013; Nguyen et al., 2013; Sung and Kim, 2010). Sung and Kim (2010) suggest that trust is a key factor in the success of a relationship regarding marketing efforts. In marketing, the central role of trust is recognised as developing and maintaining a relationship between those who take part in the exchanging process. Trust is therefore defined as the level of reliability ensured by one party to another within a given exchange relationship (Bouhlel et al., 2011). For example, consumers may make regular purchases from one specific retailer, due to their trust in the product performance and service that they may have experienced previously. As a result, authors (Chaudhuri and Holbrook, 2001; Song et al., 2012) have suggested that luxury fashion brands are one of the fastest growing industries, with consumers paying high

prices to seek both utilitarian and hedonic value in the purchase experience that is positively associated with satisfaction. Therefore, Bouhlel et al. (2011) put forward that brand trust is defined as a belief, willingness or behavioural intention that consumers have towards brands. For example, Rosenbloom and Haefner (2009) studied the effect of the country of origin on global brand trust, involving participants from the United States, Nepal, India, Poland, the Czech Republic, and Bulgaria. They found that brands associated with the United States were more trusted, with Japan taking the second leading position in terms of brand trust. However, Rosenbloom and Haefner (2009) pointed out that it was clear that the brand association and trust were dependent on the geographical regions of respondents (see also Chapter 2, section 2.4 and 2.5). Furthermore, trust can reduce the feeling of vulnerability that the customer might have during the purchase of something they have not yet tried (Hartmann and Ibáñez, 2007; Lee and Back, 2008).

Thus, brand trust, as defined by Bouhlel et al. (2011, p. 212), is a “willingness of the average consumer to rely on the ability of the brand to perform its stated function”, which can reduce risk and increase confidence in customer-based relationships (Elliott and Yannopoulou 2007). Authors (Elliott and Yannopoulou, 2007; Chaudhuri and Hoibrook, 2001; McKnight et al., 2002; Gecti and Zengin, 2013) have indicated that the main goal of marketing is to create an intense bonding experience between the customer and the brand, and the main source credited for this is deemed to be the trust that consumers have towards the product. Furthermore, it is believed that the key factor in creating such trust is in the maintenance of any long-term relationship. Consequently, authors (Chaudhuri and Holbrook, 2001; Song et al., 2012; Yoon, 2002) have suggested that brand trust may lead to brand loyalty and commitment, which can be created through the exchange relationships amongst customers (Delgado-Ballester et al., 2001; Keller, 2002; Shirin and Puth, 2011). A brand is, therefore, a trust mark for all activities that generate intangible trust, and can also be a symbol of quality (Keller, 1993; Song et al., 2012).

3.3.5. Brand Personality

Previous studies on experience with a brand have paid considerable attention to the concept of brand personality (e.g. Aaker, 2012; Bibby, 2011; Bouhlel et al., 2011),

defining it as a set of human characteristics associated with a brand (Aaker, 1997; Chung and Ahn, 2013; Lin, 2010), and a group of images or attributes that consumers may associate with the brand (Keller, 1993).

In human psychology, personality can be described as a term for the reaction an individual may have towards other people in persistent interpersonal situations in life (Azoulay and Kapferer, 2003). Similarly, many consumers express their actual or ideal identity through the use of a specific brand, and such consumer behaviour is even more visible when consumers believe that the brand personality is similar to their self-image (Farhana, 2014; Keller, 1993). For instance, a consumer may purchase a product that appeals to them and reflects the sophisticated appearance of an individual. Similarly, consumers may invest in a product because it has British associations, which may be perceived to have quality traits, or other international luxury brands for the purpose of wanting to achieve a specific identity or a status (Dillon, 2011; Jackson and Shaw, 2008; Keller, 1993; Nia and Zaichkowsky, 2000). Additionally, it has been suggested that a well-established brand with a strong personality has the ability to build a brand identity. This can be done through effectively promoting differentiation and developing strong brand equity through increasing brand preference and emotional bonding, and motivating consumer flow, to enhance the brand loyalty (Aaker, 1997; Biel, 1992). As a result, authors (e.g. Chung and Ahn 2013; Lin, 2010; Müller and Chandon, 2003) have suggested that by using the brand, consumers form expectations about the features, performance and benefits of the product. In addition to this, literature on branding and consumer behaviour has suggested that these words may play the role of consumer self-expression, whereby consumers use such expressions to form a perception about a product or service. Consequently, brand personality is typically considered to be an important promotional tool, which helps to develop an overall image, appealing to a specific target market.

Furthermore, Chung and Ahn (2013) have suggested that consumers may often assign human personality attributes to a brand's identity, which can lead to consumers associating with a product for symbolic purposes (Hawkins et al., 2004; Naresh, 2012). In this sense, Keller (1993) points out that brand personality is more related to symbolic value, rather than utilitarian functions. This basically means that consumers may associate with the brand personality in order to construct and maintain a social identity, which provides a mechanism for expressing a consumer's identity or social self (Aaker, 1997; Malhotra,

1988; Ramaseshan and Tsao, 2007). Such self-expressions and social constructs can also lead to brand loyalty.

3.3.6. Brand Loyalty

According to Aaker (1991), Bowden (2009) and Lin (2010), brand loyalty constructs are related to the level of attachment that consumers form towards the brand, which may be closely related to a user's experience. So et al. (2013) proposed that brand loyalty has three perspectives: behavioural, attitudinal, and composite loyalty. Attitudinal loyalty refers to consumers being loyal to brands or companies if they have a positive, superior attitude towards the product. This helps with avoiding the switching behaviour (Caceres and Paparoidamis, 2007), and being able to predict how long the customers will remain loyal (Odin et al., 2001). Alternatively, behavioural loyalty refers to consumers purchasing a product, and then repeatedly purchasing it again. Therefore, examining loyalty as an attitude-behaviour relationship can allow for incorporated investigation of the antecedents and consequences of customer loyalty (Dick and Basu, 1994). Similarly, Ha et al. (2011, p.676, cited in Oliver, 1999) explain the brand loyalty definition, which is:

“A deeply held commitment to re-buy or re-patronize a preferred product/service consistently in the future, thereby causing repetitive same-brand or same brand-set purchasing, despite situational influences and marketing efforts having the potential to cause switching behaviour”.

Fundamentally, brand loyalty can also be classified as customer loyalty, which is basically a strategy that develops mutual rewards, as well as benefitting the firms and customers (Ha et al., 2011; Haghkhah et al., 2013; Nam et al., 2011; Reichheld, 2001). One of the main benefits that companies achieve from brand loyalty is the increase in revenue. For example, a customer may make frequent purchases from brands such as Topshop and Marks and Spencer because of the quality a brand provides, making customers loyal to the brand by encouraging them to return for further purchases.

In addition, it is believed that companies can maximise this profit if loyal consumers are willing to purchase more frequently, willing to pay more for new products or services,

recommend products and services to others, and provide organisations with sincere suggestions (Haghkhah et al., 2013). Furthermore, such loyalties and recommendations can help companies in the reduction of marketing cost (Reichheld and Detrick, 2003). Moreover, existing and loyal customers do not often require as much marketing in comparison to attracting new customers. In addition, recommendations from loyal and satisfied consumers can lead to attracting more new consumers, through the assurances provided by the existing customers. In all, this can help to reduce the hesitation of risk among new consumers, providing them with the feeling of the product or service being a safe choice (Aaker, 1991).

To sum up, the literature indicates that marketers place increasing priority on branding their goods and services, e.g. brand name, logo, sign, symbol and other factors, in order to differentiate themselves from their competitors. These factors are important because they create the knowledge, memory and association in the minds of consumers, resulting in loyalty and trust towards a brand. This discussion on brand knowledge was important because it has provided useful information as to how consumers behave and associate with branding. However, it is now vital to discuss different branding strategies marketers use to develop a brand identity. Various strategies have been identified and are discussed in the following sections that are used by retail brands and wholesale brands to develop a brand identity.

3.4. Visual Brand Identity

According to Melewar (2003), the word ‘identity’ has been referred to as the individual characteristics by which a person or a thing is recognised, associating it with individuality that portrays the uniqueness and the essential idea of the person or a brand, allowing others to differentiate the thing or person from others. In general, researchers and practitioners consider the role of brand identity to comprise an essential tool for effectively differentiating and managing a brand (Aaker, 1996; Balmer, 2008; Buil et al., 2016; da Silveira et al., 2013; Kapferer, 2008), associating it with two views; aspirational and enduring. An aspirational view in brand identity is described as an internal and aspirational construct that stems from the brand management and corporate communication (Blombäck and Ramírez-Pasillas, 2012), which provides a link between a company and its

stakeholders (Aaker 1996; Buil et al., 2016), from which information is provided to the audience on what to expect from the company (da Silveira et al., 2013). On the other hand, ‘enduring’, also described as stable, is viewed in the context of organisational behaviour, which includes stakeholders’ performance. As a result, this section provides an overview of the characteristics associated with brand identity that have materialised with variables such as corporate brand name, logotypes, slogans, employee behaviour, and different forms of planned communications (e.g. Balmer, 2008; Buil et al., 2016; Hynes, 2009; Melewar, 2003).

3.4.1. Brand Name

According to Medway and Warnaby (2014), the most important aspect of any branding process is the use of a brand name. Commonly, the brand name is described as a set of components that contains a set of words, letters or numbers which can be spoken or verbally communicated, suggesting the benefits and qualities associated with the product offering (Turley and Moore, 1995). In the mainstream marketing literature, authors (e.g. Keller, 1993; Medway and Warnaby, 2014) have suggested that a good brand name should be ‘simple’ in that it can be easily recalled, spelled and spoken, ‘distinctive’ making it easy to differentiate from other competitors, ‘memorable’, one which consumers can easily recognise and thus, can make repeat purchasing decisions, ‘meaningful’, associated with the given product’s benefits, ‘suggestive’, described to be associated with consumers’ relationship formation, nostalgia, and experience, and ‘protectable’, with the trademark suggesting legal production, transferrable to product categories.

Additionally, it has been noted that the brand name is most commonly embedded in a basic language, which represents key features (i.e. sound, spelling and meaning) attractive to the local consumers; however, it may not be meaningful to global consumers (Usunier and Shaner, 2002). Park and Lennon (2009) propose that a brand name is described as much more than a name or symbol that is used to differentiate a retailer from its competitor. It is rather described as a linguistic cue, a verbally reproducible and articulated part of the brand, which often elaborates the brand’s image and position in the market; those brands that demonstrate universal appeal, as well as offering good brand promise, tend to

transcend national boundaries and eventually become recognised globally (Ranchhod et al., 2011), going beyond simple product inferences and evaluations, and promoting a valuable social function by group affiliation through brand identification (Zinkhan and Prenshaw, 1994). As a result, marketers use a range of brand name strategies to make the brand identification distinctive, such as ‘place marketing’, and/or ‘foreign branding’, e.g. be Berlin, 100% Pure New Zealand, and Aalborg-Seize the World (Colomb and Kalandidas, 2009; Kavartzis and Ashworth, 2008; Medway and Warnaby 2014). On the other hand, ‘foreign branding’ is described as a situation where companies deliberately try to evoke a different country image for a brand, in order to appeal either nationally or internationally to a wider audience (Leclerc et al., 1994; Ranchhod et al., 2011) by using spellings or pronunciation evocative of a foreign language. Additionally, the use of foreign branding serves the purpose of symbolic achievement, such as status and prestige within a social environment, where another country name may be more favourable, with higher status than the local country products (Balabanis and Diamantopoulos, 2008; Kinra, 2006).

Furthermore, from a retail context, Goworek and McGoldrick (2015) argue that although the brand name may have been viewed as fairly important, however, the name itself is not considered to be the most important element of branding. For example, traditionally, retail brands often used family names for business, and a person’s name can still arouse the sense of a traditional company, even when the person’s name may be fictitious, e.g. Ted Baker and Jack Wills (Goworek and McGoldrick, 2015). However, retail brands can sometimes create brand names that have abstract terms, which as a consequence makes them unique and memorable in the minds of consumers, e.g. Topshop, Simply Be and Jacamo. However, brand names sometimes also contain relevant description terms, such as JD Sports or British Home Stores (BHS) (Goworek and McGoldrick, 2015). A descriptive brand name can help by being memorable and applicable to a product range. Furthermore, Goworek and McGoldrick (2015) have also suggested that wholesale and retail brands can also use abbreviations and acronyms such as ASOS (As Seen on Screen), CK (Calvin Klein) and DKNY (Donna Karan New York) to improve memorability owing to their brevity. Consequently, Meyers-Levy (1989) explains that the brand name can serve a variety of purposes for consumers and marketers. The core purpose of the brand name is to provide firms with a trade name by which products can be identified, and further be promoted to the consumers (e.g. Paciolla and Mai, 2011; Zinkhan and Prenshaw, 1994; Uddin et al., 2013). From the consumers’ perspective, brand association represents the

growth of knowledge about the brand, accompanied by emotions and effects (Zinkhan and Prenshaw, 1994).

3.4.2. Colour

According to Labrecque and Milne (2011) and Labrecque et al. (2013), the use of colour is an integral aspect of marketing and corporate communication (Aslam, 2006), which aids in constructing a visual brand identity through the employment of associative colours, that may appeal to the intended audience or market. The employment of colour in visual identity is regarded as an essential element, as it instigates moods and feelings and controls opinions and conduct, assisting firms to position and distinguish themselves from the competitors within the marketplace (Aslam, 2006; Hynes, 2009). For instance, a brand in fashion retail may portray its principles by means of physical symbols and employment of representative colours, in the manner that Victoria's Secret has done fruitfully with styles, patterns and colours that highlight the allure and sexiness, employing soft pink to enhance a feminine setting (Chang et al., 2004). Furthermore, colour in branding is also deemed a powerful method of conveying a meaning and/or message (e.g. the brand's heritage history, national image etc.) without words, as consumers associate colours with different feelings, personality features and countries (Aslam, 2006; Satyendra, 2006). For example, All Saints increasingly uses grey within its products and retail store (e.g. atmosphere and service) to portray the vintage aspect. Monsoon uses a range of colours within its branding strategies (e.g. logos and tags) to show association with the Indian culture, which may result in confusion regarding the brand origin, as the brand is originally British. However, no research to date has looked at the association colour has with reference to manifesting country of origin dimensions in the fashion industry.

To sum up, according to the definition of branding and attributes identified in the literature, it is evident that branding is a strategy of building a strong name and other associated factors e.g. colours, celebrity and iconic figure associations that increase brand awareness, trust and brand loyalty. However, the focus of branding is no longer just about branding products, but also about branding a retail store (Ailawadi and Keller, 2004; Burt and Davies, 2010; Davies, 1992). Therefore, the next section provides a definition of retail brands, identifying the distinction between different retail brands, strategies, segmentations and retail positioning. The section then goes on to discuss different types of wholesale

brands identified in the fashion industry, some of which are either manufacturers in their own right, or vice versa.

3.5. Retail Brands

A retail brand by definition is a strategy of selling a product and process under the retail brand's own name or a separate brand name; owned, controlled and marketed by a retail company (e.g. Davies, 1992; McColl and Moore, 2011; Moore, 1995). As mentioned earlier in Chapter 1, this study mainly uses the term 'retail brand (s)' to explain the process and concept of branding a retail store and its products.

According to Davies (1992), retail brand products basically serve to provide tangible attributes, which are often produced by the third-party manufacturer, but are solely designed and named, as well as sold exclusively, by the retail store in question. Ailawadi and Keller (2004) and McCormick et al. (2014) have noted that this strategy allows retailers to create a unique position in the marketplace by developing a range of product categories identical or similar to the retail store name and design (Ghodeswar, 2008). This is because retail brand products are recognised by their brand name, which reflects their qualities, values and personalities, associated with the retail store (image) (Sullivan and Adcock, 2002; Vignali et al., 2006). Goworek and McGoldrick (2015) have therefore suggested that in order to add value to the retail brand equity, own brand labels can develop a brand identity by creating a brand name and/or symbolised brand logos that are not only for the purpose of easy identification and differentiation from the competitors (Collins-Dodd and Lindley, 2003), but which must also reflect, or be identical to, the retail store image. For instance, in the UK fashion industry, retailers such as M&S, Topshop and River Island have been using retail brand strategy for several years, selling merchandise that is owned, named and controlled by their own retail stores. Nevertheless, Collins-Dodd and Lindley (2003) argue that the structure of the retail brand strategy is complex and dynamic, firstly because retail brands can extend to offer several product categories, and secondly, although the fit seems obvious on most product merchandise, however, the store and the store brand positioning may not be consistent on all the attributes (e.g. a low price store may sell a premium own brand label and vice versa); for instance, Marks and Spencer and John Lewis.

For example, the famous British retail brand, Marks and Spencer, once known for selling only British-made goods that were solely manufactured for, and under, the name of M&S (Burns, 2012), not only shifted the manufacturing overseas, but also introduced more sub-brands to attract new, younger customers (Bevan, 2007; Burns, 2012). The sub-brands were/are owned and controlled by Marks and Spencer (M&S), but contain *foreign country image* (see also Leclerc et al., 1994; Laroche et al., 2005; Chao et al., 2005) connotations on the sub-brand names (e.g. Per Una and Collezione) inspired by the Italian culture and names. It is predicted that consumers' brand recall association is affected by the different language used for brands (Schmitt et al., 1994), and Leclerc et al. (1994) report that a foreign brand name projects different images for different products (Chao et al., 2005; Kinra, 2006). Thus, Usunier (2011) points out that the process by which the brand name may suggest the origin of a brand is becoming complex and fuzzy (see also Chapter 2, section 2.3.4). However, no research to date has looked at the country of origin from different aspects of retail brands, especially from an industry perspective. Thus, this makes it vital to develop an understanding of different types of retail brands identified in the literature, such as own brand strategy (Jackson and Shaw, 2001), own label (Kumar and Steenkamp, 2007) and sub-branding (Jackson and Shaw, 2001; Kumar and Steenkamp, 2007).

The following section will address different types of retail brands' product strategies identified in the literature, which are own brands, own labels and sub-brands.

3.5.1. Own Brands

According to Jackson and Shaw (2001), own brands are also often referred to as house brands, or consumer product brands, whereby a product is produced on behalf of the distributor and sold under its own exclusive retail store or retail channels. For example, Simply Be and Jacamo are owned and sold exclusively under JD Williams/N Brown Group ownership; however, the brand names have no connection to the parent company. Therefore, the name of the brand may not be completely identical to the retail channel/store (Morris 1979); however, this can decrease association and recognition for the parent company/brand in the minds of consumers. Furthermore, as addressed in Chapter 2, section 2.3.4, the idea of using a foreign brand name can be for the sake of taking

inspiration from a foreign country (e.g. Jacamo by JD Williams is a name inspired by the Italian ‘Giacomo Casanova’). However, the brand values and history of the company continue to remain British, and thus, the country of origin perception and associations vary depending on different industry experts and fashion businesses. Nonetheless, very little research has acknowledged country of origin from this aspect.

3.5.2. Own labels

According to authors (Jackson and Shaw, 2008; Kumar and Steenkamp, 2007; Lincoln and Thomassen, 2009), own labels, also referred to as monolithic brands, entail a strategy which involves building identity via the use of an identical store name and visual style/appearance onto the product, service and marketing activities. For example, the UK fashion retail store, All Saints Spitalfields merchandises only its own named product, named under the All Saints label. Similarly, River Island also merchandises only its own named products, named under the retail brand’s name. However, the differences between the two are evident from the manner in which they associate with the country of origin and position in the market. For example, All Saints’ *brand name* is named after a church in Notting Hill, London, and inspired by the location, which is a centre of art, music and design renowned in the UK.

Furthermore, due to its history of previously being a wholesale British brand, that brand offers premium own brand merchandise in comparison to other (high street) retail brands in the UK market. On the other hand, regarding ‘River Island’, the *brand name* has no association with its brand history or origin, following the change of brand name from Chelsea Girl to River Island (e.g. Retail Week, 2009). Previously, Chapter 2, sections 2.4 and 2.5 have indicated that country of origin is important because consumers use this as an informative cue when making purchasing decisions (e.g. Ha-Brookshire and Yoon, 2012; Ha-Brookshire, 2012; Schooler and Sanoo, 1969). Samiee et al. (2005) previously suggested that the country of origin is associated with the country with which consumers associate the brand. In other words, the country of origin is associated with the brand name, which can have a connotation to the place where the brand was established or located (Thakor and Kohli, 1996).

Furthermore, another key aspect of own brand label is that the service reflects the retail *brand image* (see section 3.6). Therefore, as consumers are becoming brand-aware at a younger age (McCormick et al., 2014), fashion retail brands such as River Island, Topshop, New Look, and even All Saints Spitalfields are attracting more younger customers to their stores (Intel, 2013) through their fun and chic atmosphere (e.g. River Island), or an association with vintage or grunge appearance/atmosphere that gives a feel of traditional English – vintage inspired art, music and design (e.g. All Saints). These atmospheric associations/layouts in terms of the staff, sales and product merchandise allow a retailer to develop a long-lasting relationship (McCormick et al., 2014). In the past, authors have looked at atmospheric retail design (Kent, 2003; Stuart, 2013); however, no research has looked at the country of origin in the context of retail brands, which has been addressed in the findings of this study by means of empirical evidence from various industry perspectives.

3.5.3. Sub-Brands

The concept of ‘sub-brands’ is described as an optional brand naming strategy, whereby the corporate brand or the branded house is the primary frame of reference for a new product; however, the name can be augmented or modified by additional naming (Jackson and Shaw, 2001; Kumar and Steenkamp, 2007). Furthermore, an alternative term to explain the concept of sub-branding is ‘multi-own label branding’, which means a retailer uses two more brands, operating and owned by the retailer, with different brand names and/or unrelated products, e.g. Blue Harbour owned and sold by Marks and Spencer, or Papaya garments sold by Matalan (Giannoulakis and Apostolopoulou, 2011; Goworek and McGoldrick, 2015). More importantly, Bhat et al. (1998) indicate that retail brands develop their fascia into multi-own label brands (sub-brands) in an attempt to develop room for a wider and new market, and growth in sales by distinguishing their position in price and/or quality offering (Au Yeung and Lu, 2009; Beldona and Wysong, 2007). In the UK fashion industry, retailers offer a wider range of price positioning (discounted and/or premium), accommodating quality promises and/or mass merchandise, for a wider age group (e.g. McKinsey and Company Report, 2013; Perrey and Spillecke, 2013). For example, the British retailer M&S was traditionally known for targeting 50+ customers; however, the brand extended its market segmentation by launching ‘Per Una’ in 2001, by

George Davies (Mintel, 2014a), targeting the younger market. The brand was further extended with its own brand label 'Autograph', offering premium products to the middle-aged market. Furthermore, the brand has also launched several other own brand labels that are driven by price and quality, but which also carry a country of origin association in their product, such as Indigo, Collezione, Best of British Collection and Blue Harbour.

Other examples of sub-branding strategy from different retailers include Firetrap, owned by Sports Direct (Sports Direct Plc, 2012), and Lipsy London by Next. However, with the increasing demand for retail brands, some of these brands have developed their recognition as a retail brand, with dedicated retail channels and stores developed exclusively under their sub-brands; for example, Firetrap.com. Again, no research to date has addressed how the country of origin is associated with sub-brands in a retail brand strategy, which again will be addressed in the findings of this study with empirical evidence from industry experts of both retail and wholesale brands.

3.6. Retail Process Brand

On the other hand, Davies (1992) has also proposed that retail branding is a process, also referred to as service branding or retail service, composed of tangible attributes (product related) and associations related to the experience consumers encounter when walking into a retail store. For example, Abercrombie and Fitch increasingly emphasise 'the American dream concept' through the store experience, which is evident through the sales staff's uniform and behaviour, the lighting, clothing print designs, and smell. Thus, process (service) in a retail environment is determined by a multitude of retail store characteristics such as location convenience (Sullivan and Adcock, 2002), in-store design and ambient environment (Kent, 2003; Sherman et al., 1997; Stuart, 2013), staff level and behaviour, customer service, familiarity and comfort with store owners and employees, affiliation, role enactment, and support for the local environment, as well as delivery options, fixtures and warranties, and credit policies (Davies, 1992; Foster and McLelland, 2015; Keller, 2010).

Berry (2000) and Mitchell et al. (2012) point out that these products and process factors (mentioned above) add value to the retail brand equity through the retail store (retail image) in the form of store patronage, consumer behaviour and loyalty (Berry, 2000; Hoch

and Banerji, 1993; Kent, 2003). Furthermore, other key benefits of retail brand strategy identified in the literature are: operating advantage in the form of superior profit margins, economies of scale, market segmentation and differentiation (Mitchell et al., 2012), improved profitability (Burt 2000; Kumar and Steenkamp, 2007), lower financial risk of launching new product (Bilal and Ali, 2013; Richardson et al., 1994), wider range of product options and improved retail image (Sullivan and Adcock, 2002) and innovation and quality (Huang and Huddleston, 2009). Thus, McCormick et al. (2014, p. 246) have suggested that in order to gain “*loyalty and seek new customers*”, many brands, as well as retailers (e.g. independent stores, outlets, and department stores) are now adopting own brand strategies and multi-channels. For instance, John Lewis is a recognised retail brand store that sells its own products, but is also a multi-channel retailer, as it is operating offline and online, but along with a retail brand strategy; John Lewis is also a department store, as it sells other branded products within its own store.

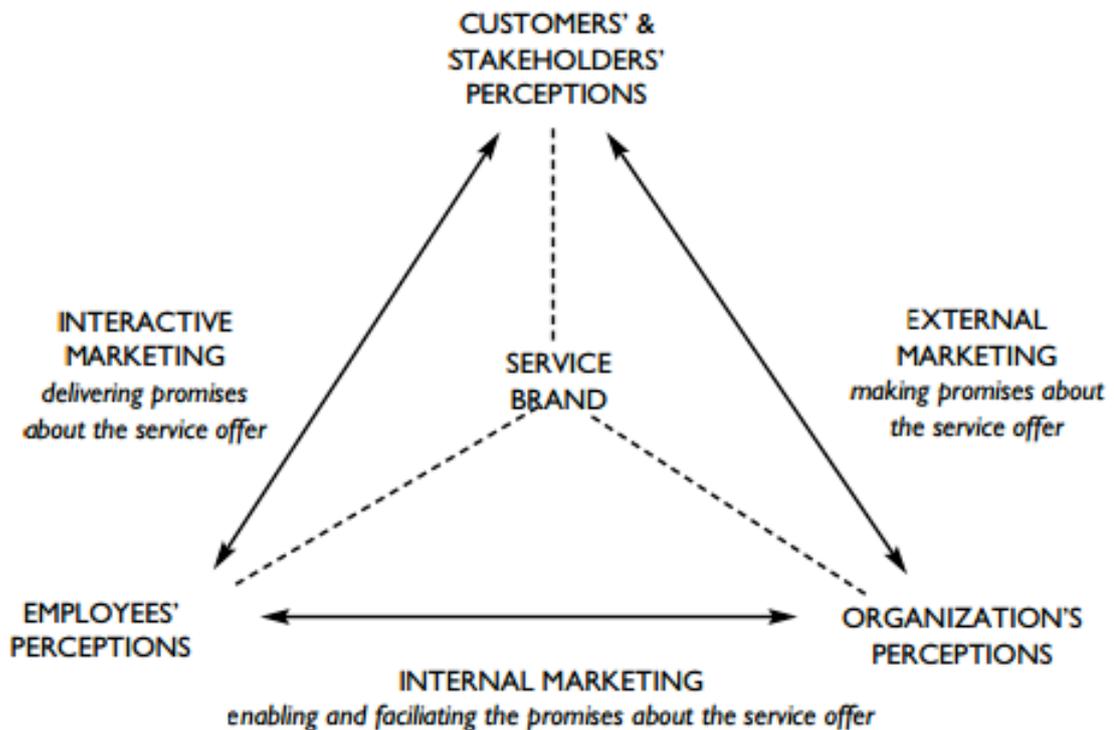
Furthermore, Goworek and McGoldrick (2015)’s study has also revealed how many department stores (e.g. House of Fraser and Harrods of London) have introduced their own brand strategy. Within the establishment of a retail brand strategy, brands and/or retailers have to provide a service that not only reflects the brand image, but also satisfies the needs and demands of customers. Likewise, it is predicted that the interaction within the retail service, depending on the type of product offering, can allow a retailer to promote country of origin components more effectively, which is evident through the findings of this study. However, this has not yet been acknowledged in the existing literature of retail marketing or service marketing, and thus, to develop an understanding, this section will now discuss retail service as part of retail brand strategy.

3.6.1. Retail Service

Retail service is described as one of the vital parts of developing a retail brand strategy, which involves integrating (see Figure 3.2) the role of the brand in the value-adding process to make the shopping experience enjoyable for customers and profitable for the retail brands (Brodie, 2009; De Chernatony and Segal-Horn, 2003; McCormick et al., 2014). The model (see Figure 3.2) by Brodie et al. (2009) illustrates the importance of

‘making promises’ and ‘delivery of promises’, and how this impacts the brand image and company image, and creates customer loyalty.

Figure 3.2: Retail brands service model



Source: Brodie et al. (2009)

Thus, discussing the concept of service as a branding strategy in the retail context is vital for this study, because it is predicted that wholesale brands are considering expanding their businesses by introducing retail brand stores (e.g. flagship and outlet stores), where they are expected to provide effective and enjoyable service in practice, in order to maintain the premium brand image and market their brand effectively.

The literature on retail and marketing has suggested that a greater number of well-trained staff with positive personal characteristics such as appearance, behaviour, level of knowledge and understanding, staff interaction with customers and credit policy (e.g. warranty and delivery) are all important factors in a retail environment which provoke a reaction and loyalty towards the store (McCormick et al., 2014; Verhoef et al., 2009). For example, in a multi-channel retail, the delivery of the product to the customer is considered

to be one of the most important factors that can reflect the brand image and thus, store or channel loyalty.

Reynolds and Arnold (2000, p.89) agree on this, suggesting that “sales staff’s loyalty can have a ‘spill over’ impact on store loyalty as consumers feel more positively disposed towards the company, with positive feelings rubbing off on the company”. McCormick et al. (2014) therefore claim that sales personnel are critical for the retail store experience, and to generate competitive retail advantages. McCormick et al. (2014)’s study also points out that although service is considered a critical factor in a retail environment, this is not followed through in the UK fashion practice. According to Parker and Ward (2000)’s study, this can be because of the lack of service or proactive staff willing to help in a retail store.

However, according to McDonald et al. (2001), branding a service is not only about the tangible product, but also about the holistic brand management approach adopted by companies to craft a unique corporate identity (Abratt and Kleyn, 2012; Balmer and Gray, 2003), through quality service reflecting the retail brand image. Ultimately, it has been suggested that service brands can increase the company’s visibility, recognition and reputation through their internal layout and design and all of their stakeholders, such as employees, customers, investors, partners, regulators and others (Gómez et al., 2004).

Furthermore, retail brand strategy also uses other marketing tools that contribute to the branding of a retail store, such as celebrity endorsement; for example, Kate Moss for Topshop (Lea-Greenwood, 2013), and Rihanna for River Island (Intel, 2015), and other constructs, such as styling, packaging, printed designs, and store ambience (e.g. Kent, 2003; Kozinets et al., 2002; Stuart, 2013). However, Jara and Cliquet (2012) argue that a store is basically the product of the company, and therefore, the store image impacts the retail brand image (Ailawadi and Keller, 2004; Burt and Sparks, 2002; Kozinets et al., 2002).

Additionally, numerous studies on retail marketing and branding have increasingly looked at how retail brands differ from wholesale brands. This has included several different factors, such as retail price, product quality, customer segmentation (Goworek and

McGoldrick, 2015; Yuen and Chan, 2010; Varley and Rafiq, 2014) and different retail formats (Goworek and McGoldrick, 2015; McGoldrick, 2002). For instance, Martenson (2007) points out how retail brands use wholesale brands to create a strong retail image. Jara and Cliquet (2012) pointed out how retail brands differ from wholesale brands because retailing is a service-oriented business, which is linked to consumers' emotional connection with the retail store (Kozinets et al., 2002).

Furthermore, Goworek and McGoldrick (2015) also pointed out the relevance of the retail price strategy with reference to retail marketing within different types of retail brands. For instance, the studies of Goworek and McGoldrick (2015) and McGoldrick (2002) suggested that pricing is an important factor for retail brands because it impacts the profitability, and sometimes can be their only source of revenue. Goworek and McGoldrick (2015) also pointed out that the key objective of pricing in a retail brand strategy is to increase market share by undercutting competitors' prices in order to attract their customers. In addition to this, Bridson and Evans (2004) and Goworek and McGoldrick (2015) have suggested that as the economic recession deepened, consumers became much stronger and more uncertain over time, and thus, pricing has become increasingly contentious and an even more important factor for fashion retail brands to differentiate between and achieve profitable advantages (Bridson et al., 2013; Bridson and Evans, 2004; McCormick et al., 2014). For example, a wholesale brand that has an image of providing expensive products in department stores (e.g. Selfridges or Harrods) has to consider merchandising affordable products in their own retail outlets (dependent on the type of retail outlet), when competing with other retail brands and in order to increase the store loyalty.

Consequently, Levy et al. (2004) and McGoldrick (2002) suggested that price sensitivity on retail brand products can be based on the individual product level and/or store performance. For example, a price reduction of a suit may increase the store traffic, and increase the store or brand sales. However, the price reduction also has the ability to generate a positive or negative view of the other items within the store, and thus of the store's image (McGoldrick 2002). For example, a British wholesale brand (e.g. Barbour or Henri Lloyd) may consider merchandising lower priced products in their own retail outlet in order to attract the mass market. Thus, the retail price strategy is imperative for this study because, as discussed previously in Chapter 2, section 2.4 and 2.5, various authors

(e.g. Koschate-Fischer et al., 2012; Sharma, 2011) have examined whether consumers are willing to pay the price for a country of origin with a favourable country image. On the other hand, although Goworek and McGoldrick (2015) have briefly addressed pricing strategy in different retail brands, however, no research to date has looked at the impact that blurring between retail brands and wholesale brands may have on the retail price strategy, with specific reference to country of origin.

Likewise, authors (Bhatia, 2008; Goworek and McGoldrick, 2015; Varley and Rafiq, 2014) have also looked at the relevance of product quality required in a retail brand strategy. For instance, Yuen and Chan (2010) suggested that the quality of the product and service is regarded as the key strategic component of competitive advantages, which generates customer loyalty, retention and profitability. Goworek and McGoldrick (2015) argue that, in part, wholesale branded products are deemed to be more expensive, and have much superior quality, sometimes owing to better design and material. Retail brands, on the other hand, are advised to improve the quality of their products and communicate with their customers effectively (Bhatia, 2008; Yuen and Chan, 2010). Discussing the relevance of product quality is vital for this study because, as previously identified in Chapter 2, section 2.3, 2.4 and 2.5, consumers use country of origin as an informative cue to evaluate the quality of the product, and thus, make preferences and purchasing decisions accordingly. However, again, no research has looked into country of origin and its association with product quality from industry perspectives, especially in the modern period in which the boundaries between retail brands and wholesale brands have blurred.

Furthermore, Beneke et al. (2015) and Sullivan and Adcock (2002) have looked at customers' behaviour and location with reference to retail brand strategy and image. For instance, Sullivan and Adcock (2002)'s study found that customers, particularly the elderly market, were concerned with "*too much merchandise on the racks*" (p. 242), which resulted in making the aisles hard to navigate to find a product. According to Sullivan and Adcock (2002), this concern appeared due to the inconvenience provided in terms of service by the store.

Although many authors have researched the country of origin's influence on customers' perceptions and preferences, no research to date has addressed how the shifts and movement within retail brands and wholesale brands are blurring the differences between

the two, and the associations they have with country of origin in their branding strategies, and the findings are limited in the UK. This can again be found in the analysis in Chapters 5 and 6 with the empirical evidence. The findings of this study will, therefore, provide evidence with relation to customers' association with country of origin in retail brands versus wholesale brands, adding value to the association and different demands and expectations the UK and the global market have from country of origin with different retail and wholesale brands. These changes are becoming an important issue to examine in the fashion industry, because with the retail brand benefits, many designer labels and wholesale brands that are known for premium branded products, with experience linked to the product usage (e.g. Mitchell and Papavassiliou, 1999), are developing their own dedicated channels and stores, in order to have more control over their product merchandise (Amrouche and Yan, 2012) and to increase market segmentation.

On the other hand, retail brands that are known for selling products exclusively within their own retail stores (Davies, 1992) are constantly in the process of seeking new and more profitable ways of growing their businesses and differentiating their retail brand image from those of their competitors (Sullivan and Adcock, 2002), such as internal expansion, external expansion or acquisitions (McColl and Moore, 2013; McCormick et al., 2014; McGoldrick, 2002), such as co-branding strategy (Wang et al., 2012), e-commerce (Blázquez, 2014; Guercini and Runfola, 2015), pop-up stores (Salmon, 2013) and multi-channel strategy (Amrouche and Yan, 2012), in order to expose their brand and develop a better brand image.

Changes such as wholesale brands becoming retail brands and the issues in these changes will be briefly discussed in section 3.8, and a detailed discussion on the blurring between the two with country of origin in the context will be addressed in Chapter 6.

In summation, this section has provided a discussion on the product and process-branding strategies utilised by the fashion industries to develop a retail brand's identity. The main areas covered in this section were the definition, strategies and characteristics (Davies, 1992; Goworek and McGoldrick, 2015; McColl and Moore, 2011). The literature has identified that retail brands and wholesale brands can also be differentiated in terms of their position in the market and use of retail formats (Anselmsson and Johansson, 2013).

As a consequence, the next section will present examples of retail brands that are similar to those identified and interviews for this qualitative study, in order to understand the perception and relevance of country of origin in retail and wholesale brands from industry perspectives. Following the retail brand examples, this section will also illustrate how different retail brands can be segmented and positioned in the market (e.g. luxury/premium, high-street and value retailers).

3.7. Classification and Examples of Different Fashion Retail Brands

This section aims to present examples of different types of fashion retail brands, similar to those identified and utilised to examine the impact of country of origin in this qualitative study. Presenting the examples is important because they will illustrate how the structure of retail branding has become increasingly complicated as many fashion retail brands, designer label brands, and/or wholesale brands sell their products across a range of distribution channels and own brand retail stores. This is especially relevant since the study has identified that many designer brands are more involved in retail brand strategy, and many wholesale brands have moved into retailing, providing their own brand strategy in their exclusive retail store (e.g. flagship stores, outlets and online) as well as wholesale through other distribution channels (e.g. department store and independent stores).

Likewise, the development of brand segmentation and the development of own brand strategy in different retail formats and channels are also discussed in this chapter, because the study has identified that retailers, e.g. department stores and online retailers, are not only introducing own brand labels (Goworek and McGoldrick, 2015), but are also using resources to promote country of origin as part of their branding strategies (e.g. Hobbs.co.uk) as well as developing an identity in the global market (e.g. Bull-It Jeans).

Therefore, Chapter 3 will now discuss the different retail brands segmentation and positioning, followed by more explicit mini-case studies, similar to those interviewed for this qualitative study from the UK fashion industry.

3.7.1 Retail Brands Segmentation and Positioning

In recent years, there has been an increasing development of own brand strategy in online retailing, e.g. ASOS and Boohoo. However, the development of own brand offerings within different levels of the retail market is still considered to be an important element contributing to the overall growth of the fashion industry (McColl and Moore, 2011; 2014). For example, in the evolving fashion industry, different levels of wholesale brands dominate the luxury market, offering premium quality products, such as Burberry, Barbour, and Henri Lloyd, selling branded products. These branded products are sold in a range of other retail stores, e.g. Flannels, Selfridges, Debenhams, House of Fraser and John Lewis Partnership, as well as operating own brand strategy within flagship stores, and (in some cases) in their own retail outlet (Goworek and McGoldrick, 2015), but are also increasingly involved in developing retail brand recognition through exclusive retail stores and own websites (Intel, 2016b), as well as wholesaling through other department stores and other online retailers. Likewise, Goworek and McGoldrick (2015) have suggested that the term luxury or premium is often used for branded products because the products are often custom-made in one piece, e.g. tailored or waterproof, and as a result, they are often labour intensive and thus, expensive.

Furthermore, authors (Hennigs et al., 2012; Kapferer, 2008; Li et al., 2012; Okonkwo, 2007; Tynan et al., 2010) have suggested that luxury and premium brands are deemed important in the fashion market because they play a key part in social recognition and have an emotional impact on consumers, and thus, luxury brands are often associated with strong promising brand names, excellent quality, reliability, durability, higher prices, uniqueness, aesthetics, ancestral heritage and history (e.g. Private White V.C., Paul Smith, Burberry). Consequently, previous studies on luxury products and country of origin (e.g. Godey et al., 2012; Magnusson et al., 2011) have found that both the brand's attributes and the place of manufacture or assembly in purchasing decisions are greatly important for luxury products (Godey et al., 2012). Thus, many luxury brands and their branded products with good reputations are often linked with high country images (Godey et al., 2012). However, no research to date has analysed the importance and use of country of origin within premium (wholesale) retail brands from an industry perspective.

Likewise, in the current evolving fashion industry, the luxury market is also dominated by design-led retail brands (e.g. Hobbs London, Phase Eight and Joules), which are positioned higher than the traditional mass-market brands e.g. Topshop, River Island, etc., due to their unique craftsmanship, quality and price (Goworek and McGoldrick, 2015), with luxury standards and associations; thus, British association with design-led retail brands can be noticed through a range of visual content e.g. brand name, website information and other attributes of products and service. However, again, no research to date has analysed the importance of country of origin within design-led retail brands, and the impact it has on their brand image and brand identity.

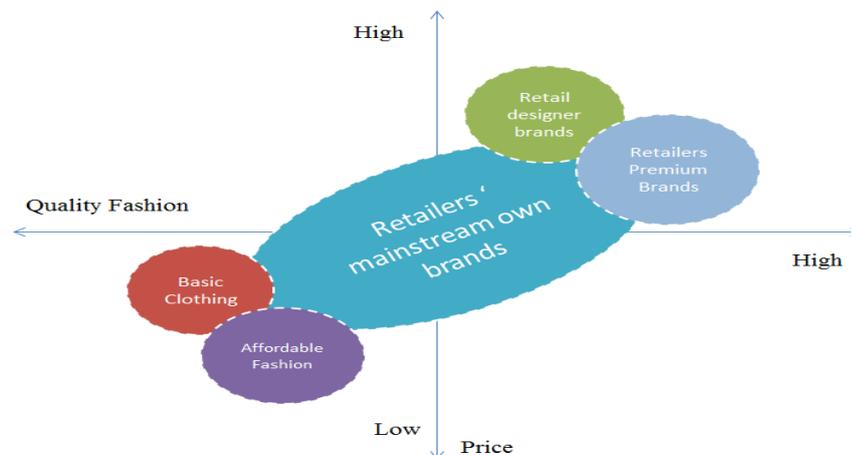
Additionally, another segmented market that is also evolving in the retail structure is the middle market (high-street) brands. In the fashion industry, the middle market (high-street) is dominated by specialist fashion retail brands (high-street brands), e.g. Topshop, River Island, NEXT and Marks and Spencer. These retail brands are mainly known for providing relatively low-priced products in comparison to luxury or premium brands; owing to the economies of scale, they are often involved in selling large quantities of merchandise (Goworek and McGoldrick, 2015). Loo and Hackley (2013) indicated that many middle market retail brands in the fashion industry often specialise in a particular area, which enables them to differentiate themselves from their competitors, e.g. targeting a different segmented market, price range and/or brand positioning or strategies. For instance, Topshop and River Island are recognised as developing branding strategies (e.g. fast fashion etc.) that specifically attract the young, chic market (e.g. Mintel, 2013).

Moreover, international fast fashion retailers, such as Swedish H&M, might be regarded as selling products of a lower price and lower quality in comparison to Spanish Zara and Mango, in the UK Market. According to some researchers (Barnes and Lea-Greenwood, 2006; Barnes and Lea-Greenwood, 2010; Barnes, 2014), the fast fashion strategy is known for providing speed to market, with products often being *copies* or *duplicates*, inspired by the runway fashion shows, designer-wear or magazine advertisements, reflecting consumers' demands and needs (Joy et al., 2012). The trend for the fast fashion strategy used by international retailers such as Zara, Mango, Gap, and H&M has increased the competition in the UK high street, which has resulted in the UK's fashion being the most competitive in Europe. Nevertheless, other retail brands in the UK market, such as Marks and Spencer (M&S), offer affordable, as well as premium, own merchandise such as the

Best of British Collection and Autograph, tailored for the high-end market. Consequently, Goworek and McGoldrick (2015) pointed out that middle market retail brands can be positioned at the top or in the middle of the perceptual map (see Figure 3.3 below).

The trend of own-label merchandise in the fashion industry has also become increasingly popular in supermarkets and value retailer brands, such as George at Asda (Intel, 2015b), F&F by Tesco and TU at Sainsbury's; discount retail brands such as Matalan, New Look, Primark and other factory outlet. The term value retail brand is often used to describe discounted retailers, with lower prices than typical 'high-street stores' or brands with a reduced range of service, with unbeatable prices (Kapferer, 2008; Varley and Rafiq, 2014). Ross and Harradine (2010) have pointed out that the boundaries between value and middle market retail brands have somewhat blurred, as value retailers have changed their strategies from selling "cheap clothing" to "cheap fashion" (P.351), as well as providing own brand strategy with the unique retail service. However, what differentiates a value retail brand from the middle market is that a value retail brand uses an everyday low pricing policy, whereby the price of the merchandise remains constantly low, rather than changing the pricing strategy from high to low, and vice versa. Consequently, it is evident that branding a retail store is becoming a key trend in the fashion industry. However, no research to date has addressed how the differences are blurring, or the impact the country of origin has on these changes.

Figure 3.3: Retail brand positioning



Source: Goworek and McGoldrick (2015)

In summary, section 3.7.1. discussed the manner in which different retail brands; can be segmented and positioned in the market. The next section presents examples of a range of fashion retail brands in the form of mini-case studies in order to illustrate how the structure of businesses has changed or developed over the years, thus blurring the differences between retail brands and wholesale-oriented businesses

3.7.2 Example of Different Fashion retail brands

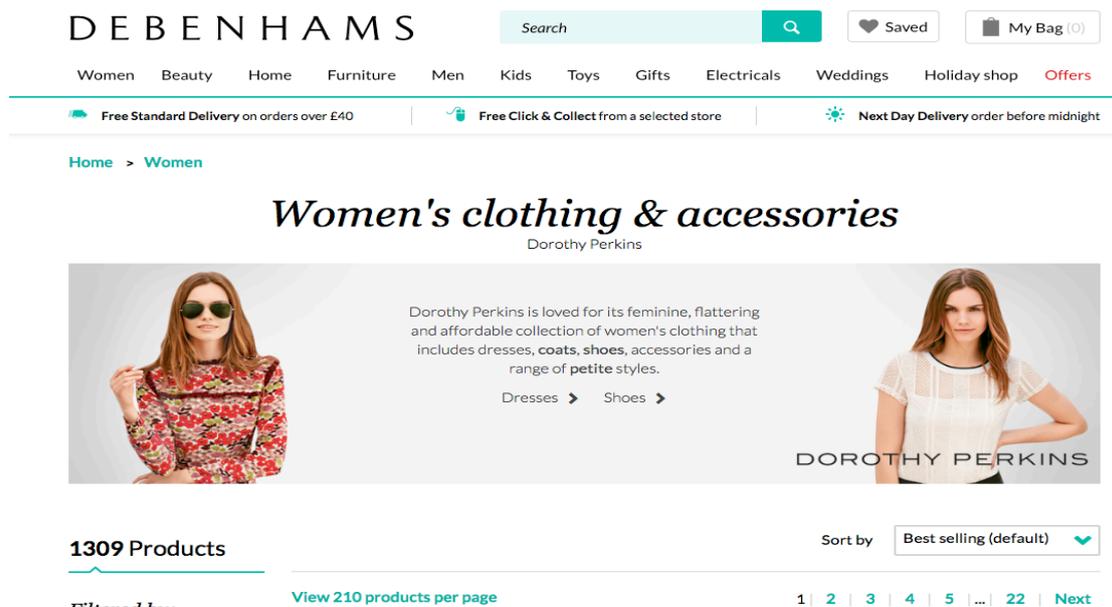
This section presents examples of different retail brands similar to those used in this qualitative study, in order to examine the impact of country of origin (COO) on the UK fashion industry. The brands include Dorothy Perkins, Next and Jigsaw. The examples are used as illustrative case studies due to limited research and evidence in the literature on the structure and blurring of retail and wholesale brands in the UK fashion industry, and the impact of COO in this matter. Furthermore, these retailers are particularly significant to the study because it seems that COO is an important part of their overall branding strategies (e.g. Aiello and Donvito, 2016; Chattalas et al., 2007), linked to the brand's heritage, promoted on the website etc.

Case study 1: Dorothy Perkins

Dorothy Perkins, a UK middle-market (high street) brand, has undergone several changes over the last few decades. For instance, the company was originally under the name H. P. Newman and had 12 stores, with the main focus being on ladies' hosiery and underwear, and so the company was named Ladies' Hosiery and Underwear Limited (fiber2fiber.com, 2016; arcadiagroup.co.uk, 2016; dorothyperkins.com, 2016). The company was owned by the Farmer family, and in 1939 the wife of the owner suggested a new name for the company: Dorothy Perkins. This was the name of her favourite rose (arcadiagroup.co.uk, 2016), which was inspired and had associations with the award-winning American rose-grower Charles H. Perkins (Staffordshirebed.com). In the 1960s, Dorothy Perkins developed 250 shops under its name, and also managed to create recognition on the British high street (fiber2fiber.com, 2016) by selling large quantities of merchandise (e.g. Goworek and McGoldrick, 2015). In the 1970s, Dorothy Perkins was bought by the Burtons Group, which later became the Arcadia Group in the 1990s. The Arcadia group

has ownership of other fashion retail brands, such as Burton, Evans, Topshop, Topman, and Miss Selfridge, among others (fiber2fiber.com, 2016). Following this, many other changes occurred, such as the introduction of the ‘Secrets’ lingerie and nightwear range (1980s), the growth in maternity cover in dedicated retail stores, and the launch of its online store (1990s) and tall collection (2000s); they now have over 600 retail stores with 124 international outlets (2014). Nonetheless, until very recently, each Arcadia retail has been operating a retail brand strategy, and selling affordable own label products within its own dedicated store (see Figure 3.4 for an example), and on its dedicated website. Currently, Dorothy Perkins sells its own labels within its own dedicated stores, but also merchandises its own labels’ products in other department stores, such as House of Fraser (e.g. houseoffraser.co.uk, 2016) and Debenhams (see Figure 3.4 below), and international pure-player retailers, such as Zalando (e.g. zalando.co.uk, 2016).

Figure 3.4: Dorothy Perkins



Source: www.Debenhams.com (2016)

Thus, Dorothy Perkins can be regarded as both a retail brand and a wholesale brand. Moreover, the company is currently involved in manufacturing products in a range of countries, including Turkey, India, China, and the USA.

According to Tao and Fu (2007), over the years, Turkey has been the second largest clothing exporter with a net export value of US \$12.7 billion following China's figure of

over US \$70 billion. Indeed, China is the leading manufacturing country, providing lower prices and superior clothing quality. The advantage of sourcing from Turkey includes ease of procuring fabric (due to the country's high-quality cotton cultivation and its technologically advanced textile production), the low policy costs (due to Turkey's liberalised access to the European Union), and the relatively low shipping costs (due to its proximity to Europe) (Takotli and Kizilgun, 2009). Moreover, until very recently in 2015, the tycoon of Arcadia group, Sir Phillip Green, had been speaking out in support of UK manufacturing, revealing that more home-grown companies now supply to his retail empire (Manufacturingglobal.com, 2016). Support for local manufacturing is rising in the Arcadia group because it is believed that cutting the dependence on overseas manufacturing such as China (which shows increasing growth in manufacturing costs) can provide greater capabilities and scope, such as bringing the design ideas and responding more quickly, manufacturing and transporting quickly, whereas in China it can take about six months to manufacture and transport the product (Manufacturingglobal.com, 2016).

Case study 2: Next

Next is a multi-channel, middle market retailer, which was established in Leeds as a gentlemen's tailor, by Joseph Hepworth, and was thus named J Hepworth & Sons (Nextplc.co.uk, 2016). Joseph Hepworth was a Yorkshire-born tailor, who worked in partnership with his brother-in-law James Rhodes. Based in Leeds, J Hepworth and Sons grew quickly by 1881, employing 500 people to make quality three-piece suits (catalogue-connect.co.uk, 2016). In 1981 Hepworth bought the chain Kendall's and Sons, an umbrella seller and rainwear shop founded in the 1870s by William Kendall. Kendall and Sons was bought to develop into a womenswear group called NEXT (catalogue-connect.co.uk, 2016). In 1982, Next launched its first womenswear store, and thereafter, 70 NEXT stores were set up around the UK in 6 months' time (Nextplc.co.uk, 2016). Since 1982, Next grew further, launching menswear and home interiors. In 1986 the parent company, J Hepworth & Sons, officially changed its name to Next plc. The company then introduced mail orders, childrenswear and home shopping, all under the name Next. Thus, in 1993, Next made the announcement that it would be using a 'one brand' branding strategy; a strategy of selling own brand labels under the retailer's own name and rights (see section 3.5 above). The company then introduced Internet shopping and other services, such as next-day delivery, all under the 'one brand strategy', making Next the retailer of the year

in the British high street. Today, Next still sells its ‘own brands’, but also sells other international brands, such as Hugo Boss, Abercrombie & Fitch, Coast etc. Despite the development of selling other labels under Next retail, Next’s ‘own brand’ labels are solely sold in Next’s dedicated stores.

Case Study 3: Jigsaw

Jigsaw is a premium British retailer, established in 1972 by John Robinson. The company first opened stores in Hampstead, London and Brighton (Jigsaw-online.com, 2016), and has since expanded with over 70 stand-alone stores in the UK, 36 concessions – mainly in John Lewis (Jefford, 2016) – and a successful e-commerce business, which emphasises the British heritage, the importance of style and ethical sourcing (e.g. jigsaw-online.com). Moreover, Jigsaw also has ownership of additional own label lines, including Jigsaw Junior, Jigsaw Home and Jigsaw Menswear (internetretailing.net, 2016), selling stylish clothing and other products at premium prices. The premium products range from silk to cashmere (jigsaw-online.com). Along with the transformation from a retail- to wholesale-oriented business, the company has increasingly focused on providing an excellent experience with a high level of recommendation (Mintel, 2016a), and in-store atmosphere. For instance, Mintel (2014d) reported that Jigsaw launched a new store on London’s Duke Street in Mayfair, which is retail with leisure, with fashion being sold alongside art, music and literature and a café. The retail store also contains a jukebox that allows customers to choose the music being played in the store. Along with the in-store experience, Jigsaw has also been known for caring about the environment; for example, Jigsaw collaborated with a fair-trade brand on exclusive jewellery for its SS/2016 collection (Mintel, 2016c) and thus, has been seen as an ethical retailer. Therefore, the company can now be regarded as a retail brand, wholesale brand, and an online retailer, among other things.

Jigsaw’s brand mission is to provide designs that are timeless, independent-minded and fun; something that is beautiful, meaningful and will last for years (jigsaw-online.com, 2016). The designs (e.g. silhouettes and patterns) are created by the design team, in-house (jigsaw-online.com/blog, 2014) and by other freelance designers (e.g. Collette Brown), in the UK (jigsaw-online.com/blog, 2015). The design process in-house involves each step from sketching the initial step to fitting the final garment (jigsaw-online.com/blog, 2014). The advantage of Jigsaw designing the product in-house in the UK is that they are able to

take their inspiration from the nearby surroundings, such as the market, the V&A art gallery etc. and adapt it quickly into a design idea for eager customers (see also Jigsaw-online.com/blog, 2014). Moreover, in terms of sourcing, the CEO of Jigsaw has reported in an interview with Michelle Russell of just-style (2014) that the company has two main sourcing portals, and they are China and Romania. It is reported that the main issue Jigsaw faces with China is not the inflation but the currency exchange. However, Jigsaw is also involved in sourcing accessories and fabric from Spain, Italy, as well as Turkey. There is some sourcing involved from the UK as well; however, the challenge is that there are limited sources. Nonetheless, the CEO has reported that they have their own pattern rules, and source their fabric from the leading mills around the world, and all this, along with their heritage, is what their marketing strategy is based around.

In summary, section 3.7.2 discussed the manner in which different retail brands can be segmented and positioned in the market, depending on the price, the quality of the product, design, and strategies. Based on this section, it can be concluded that, despite the emerging trend of whole brands (luxury and premium brands) developing their own brand strategy (Goworek and McGoldrick, 2015), the study has identified that differentiating the image from traditional mass-market retail brands (high street and value brands) is still considered important for many design-led premium and wholesale retail brands.

Furthermore, to illustrate how the structure of the fashion business has changed over the years, with specific reference to the blurring of retail and wholesale brands, section 3.7.2 presented examples of different retail brands. The next section discusses the definition and concept of the wholesale brand, identifying and analysing different wholesale brands and/or enterprises that have contributed towards identifying the understanding of country of origin from retail and wholesale brand perspectives in the findings section.

3.8. Wholesale Brands

Wholesale brands, by definition, are branded products owned and created with a unique label by manufacturing organisations or suppliers (Chimhundu et al., 2010), and sold at wholesale prices for distribution to various retailers which are independent from the brand owner (Chimhundu et al., 2010; Keiser and Garner, 2012; Zentes et al., 2012). As mentioned earlier in Chapter 1, this study uses the term wholesale brands, representing brands that were historically known for manufacturing brands and premium brands that later emerged in the market (Dicken, 2015; Salmon, 2013).

Chimhundu et al. (2010) propose that manufacturers or suppliers are basically the owners of the branded products, and therefore have a responsibility for all aspects of brand development, which includes production, transportation, promotion, and support towards the brand management. According to Dicken (2015), many wholesale brands have changed their ways of doing business over the past two decades. For example, some wholesale brands (e.g. Levi's and Hugo Boss) were also manufacturers in their own right, which involved having ownership of the manufacturing facilities and process involved in the production, but, due to the demand of high labour costs in developed regions/domestic European market, many wholesale brands moved their production overseas, in order to attain lower labour cost advantages, due to the nature of labour intensive work (Dicken, 2015; Perry et al., 2013; Towers et al., 2013). However, there were/are also other brands (e.g. Kate Spade, Musto and Bench) that were never manufacturers, but competing in the same market as those that did manufacture their own products, and/or had ownership of the manufacturing facilities. This is by providing products that contain a strong brand name and message, and by promising quality, designed to satisfy customers' needs and desires (Keller, 2003). The brand's attributes, along with the extensive use of advertising and promotional tools, allow brands to create a reputation for producing and offering a high-quality product (Keller, 2003). This reputation has allowed the brands to classify themselves as premium brands and increase the customers' loyalty. As a result, many retail brands sell wholesale brands in their retail environment in order to generate customer interest, patronage and store loyalty (Ailawadi and Keller, 2004; Glynn and Brodie, 2012; Martenson, 2007).

However, with the growing trend of superior profit margin, control over product merchandise and customer segmentations (e.g. Amrouche and Yan, 2012; Goworek and McGoldrick, 2015; McColl and Moore, 2011), many wholesale brands and manufacturers that traditionally distributed their branded products via a series of whole distribution such as department stores, independent stores, concessions and factory outlets (Davies, 1992; Kumar, 1997; Salmon, 2013) have now developed their brands through their own dedicated retail channels and stores (e.g. flagship, speciality, and outlets) (Salmon, 2013), as well as continuing their wholesaling businesses through third-party distributors. For instance, Kozinets et al. (2002) pointed out that the development of flagship stores involves 1) carrying a single brand of product; 2) the brand manufacturer owning them; and 3) operating with the intention to strengthen the brand positioning (Burberry Annual Report, 2013/2014), rather than selling the products only for the purpose of making profits (Kozinets et al., 2002).

For an industry example, the Burberry Annual Report (2014) points out that Burberry, established in 1856, now sells its product to the end consumer through both retail (including digital) - e.g. direct operating stores, concession and franchise stores and own website - and wholesale channels, including departments and speciality stores. The retail side accounts for 70% of revenue and wholesale accounts for 27% revenue. As a global British brand, it also has licencing agreements in Japan and globally, influencing the domestic and technical expertise.

The key strategic benefits of wholesale brands shifting into retail branding includes growing sales, control over how the brand is presented (Kozinets et al., 2002; McColl and Moore, 2011), control over pricing, direct interaction with consumers, including packing, marketing and customer experience, and being able to test out new products and markets (Salmon, 2013).

Nevertheless, Salmon (2013) has also pointed out several challenges with wholesale brands moving into retail brands, such as channel conflicts, product development, supply chain, and customer experience. This, in particular, is debated with the fact that many retail brands view wholesale brands becoming direct retail brands as a threat. As a result, many

retailers can demand exclusive products and/or more product volume, which can have a direct impact on the costs (Salmon, 2013).

The next section will present examples of different types of wholesale brands and their branding strategy. The purpose of presenting mini-case examples is to illustrate how the structure of wholesale brands has evolved in the UK fashion industry, to becoming retail-oriented businesses. The examples are presented in the form of mini-case studies because the development of wholesale brands becoming retail-oriented in the UK fashion business is limited in the existing academic domain. 3.8.1. Examples of Fashion Wholesale Brands

This section aims to provide an overview of different types of fashion wholesale brands identified in the literature; analysing their role, changing structure and the retail and branding strategies they are utilising in becoming retail-oriented businesses. It is predicted that with the demand of global sourcing, globalisation, retail brand strategy and wholesaling both online and offline (Dicken, 2015), the structure of the fashion industry has become increasingly complex, resulting in many wholesalers (manufacturer brands) becoming retail-oriented businesses, by providing their own dedicated channels and stores for their retail brands, as well as using wholesale strategies by distributing product brands through third party retailers (Keiser and Garner, 2012; Glynn, 2010). As one aspect of this research is examining the impact country of origin has on the UK fashion industry, where the differences between retail and wholesale have blurred, this chapter presents examples in the form of illustrative case studies of different types of wholesale brands that can be identified in the fashion industry, e.g. brands that were/are suppliers or manufacturers, while others are suppliers, but have also established brands on the side, competing in the same market as the rest of the brands (e.g. NIKE and Musto, and companies that have become parent companies to luxury fashion brands e.g. PVH). These brands were selected as illustrative case studies because 1) academic evidence is limited; 2) COO seems an important element of their overall branding strategies, e.g. linking to heritage; and 3) the examples are similar to the UK fashion companies utilised in this qualitative study to examine the impact of country of origin in the UK fashion industry.

Case Study 1: NIKE

According to Donaghu and Barff (1990), one of the most noticeable changes identified in the apparel industry was the transformation of the apparel market and products undergoing a locational shift with manufacturing operations. Nike, an American brand for instance, emerged in the market in 1964, at the time when the massive upheavals in the athletic footwear market began. The brand began under the name Blue Ribbon Sports (BRS), as an exclusive distributor of shoe products by Onitsuka Tiger, a Japanese manufacturer. However, with an increasing growth in sales (e.g. \$2 million), Tiger decided it wanted to distribute its own shoes in the United States, and offered to buy 51% of BRS. As the relationship with its partner company called 'The Tiger', withered, BRS began a partnership with a large Japanese trading company called Sogo Shosha (sōgō shōsha). Nissho agreed to contract independent manufacturing sources for BRS' line of shoes (Ninon-Koyo and Nippon Rubber), which today are marketed under the brand name Nike. When Nike was established, all of the production and final assembling was located in Japan. Nippon Rubber became BRS' exclusive manufacturer for three years, during which time Japanese companies began to take control of BRS' course of development. Later, Nike purchased its own factories back in the United States (where its headquarters is based) and other countries, producing equipment products. Today, Nike sells a small amount of plastic to other suppliers through its wholly-owned subsidiary, NIKE INM. Inc. The company's own Jordan brand designs, distributes and licenses athletic and casual footwear, apparel etc. and is reported as a separated category within the NIKE brand (www.sec.gov, 2016).

Case Study 2: Musto

Musto is a leading British manufacturer of cutting-edge performance apparel with a history of over 50 years (www.musto.com, 2017) of providing specialist equipment for sailing and equestrian competitors. The brand has developed its recognition among other performance-led brands (e.g. Barbour, Henri Lloyd) by using the latest technology fleece to help buyers withstand the forces of Mother Nature (e.g. rain and wind). It quickly became popular when it was first introduced into the UK market in the mid-'80s by the founder of the Musto brand, Keith Musto. The fleece was inspired by a new fabric that had hit the United States through a company called Malden Mills (Musto.com, 2017) and was immediately

sourced for the UK market, creating two Musto products, Snug Blouson and Snug Shirt. Today, these two products are still the most popular Musto products, selling up to 30,000 items each year since the range was launched. Along with these two popular items, Musto is also currently involved in making products from GORE-TEX® and Windstopper® materials, which make the product both water- and windproof as well as highly breathable. For its leading performance in active-wear and in providing quality clothing for country sports and sailing to both Her Majesty the Queen and His Royal Highness The Duke of Edinburgh for their outdoor lifestyle, in 2010 Musto received the Royal Warrant in recognition of its work (www.marketingweek 2010).

In terms of manufacturing, from the very start Musto was determined not to make clothing products (unlike their competitors, e.g. Barbour), but was more interested in providing better clothing products that stood out regarding performance as there was both a need and a demand for better clothing. Nonetheless, being the leaders in providing cutting-edge performance-wear, the Royal Warrant (Musto.com, 2017) and their history as innovators in being the first to bring fleece into the UK market has always kept Musto in the strong position of being British leaders in performance active-wear. Thus, British identity remains an important part of the brand's heritage. Today, Musto is sold in over 40 countries, in a range of independent retail stores e.g. Aspecto in Manchester etc., and in their own outlet stores e.g. in York designer outlet and on their own website. Thus, Musto can be regarded as a manufacturer, distributor, manufacturer and a retailer.

Case Study 3: Phillips-Van Heusen Corporation (PVH Corp)

Another example of a clothing company that established an identity as a clothing manufacturer and then moved into becoming a fashion enterprise/brand owner/supplier/wholesale brand distributor is PVH Corp., under the listed company name 'Phillips-Van Heusen Corporation'. PVH Corp is an American clothing company that was established in 1881 as a hand-sewn shirt maker. The company initially started the business selling hand-sewn shirts to local coal miners, and later introduced the concept of the arrow trade collar used for men's dress shirts, which became popular within the premium market. This popularity and recognition of PVH corp. in the premium market enabled the company to launch its own premium labels, e.g. Geoffrey Beene shirts and G.H. Bass and Co.'s

shoes, which were distributed through multi-channels (PVH. com, 2015). Furthermore, the business was primarily based in North America until the early 2000s; however, like other retailers and brands, PVH Corp also became a global business, having manufacturers in a range of countries, including in Europe, the Asia-Pacific region and Latin America. Nevertheless, as the competition grew for fashion brands in the industry, PVH corp. later gained ownership of other American lifestyle brands, e.g. Calvin Klein, Michael Kors, and Tommy Hilfiger, along with selling its own heritage brands, such as Speedo, *IZOD*, *Van Heusen* and *ARROW*, which are distributed through multi-channels, including retail, wholesale, and licensing to third parties (PVH Annual Report, 2014). Thus, today, PVH Corp is a brand owner of the abovementioned lifestyle brands; however, historically the company was also a manufacturer in its own right.

In summary, based on the mini-case studies addressed above, it is evident that the national identity of the company is important for the business, associated with the history of manufacturing, establishment of own brands, and gaining control of national lifestyle brands. It can therefore be concluded that, due to the high demand for globalisation, global market and increasing demand for fashion brands, many manufacturing brands have shifted their manufacturing systems overseas, becoming business enterprises or fashion clothing brands. Furthermore, it is also evident that, despite the movement towards global production and the evolving structure of the business, the heritage history of being manufacturers in their national countries plays an important part of each brand's and enterprise's identity.

The findings of this study will provide more insight into these changes with empirical evidence, which will also shed light on the relevance and perception of country of origin from the perspective of wholesale brands, some of which were/are also manufacturers in their own right.

3.9. Chapter Summary

It is evident that many manufacturers, retail brands and wholesale brands have restructured their businesses, and have moved their production overseas to achieve lower labour cost advantages (Barnes and Lea-Greenwood, 2006; Moore et al., 2007; Towers et al., 2013). Few companies have ownership of overseas factories, but many retail brands and wholesale brands are now heavily involved in sub-contracting production (Dicken 2015). Nevertheless, to satisfy customer demand and respond effectively, many retailers and brands often carry out initial designing in-house, and/or locally via third party designers (e.g. Mintel, 2016). Thus, due to the social, political and economic factors, as well as the emerging trend of globalisation and global market, ‘Made in [...]’ no longer fully corresponds to the brand’s home country (Chu et al., 2010; Han and Terpstra, 1988; Pecotich and Rosenthal, 2001), or the place where the product is designed or the material is sourced, and as a result the notion of country of origin has become dynamic and complex as different aspects of fashion production are located in different countries. However, no research to date has looked at country of origin from the manufacturing process and concept of retail brand and wholesale brands in the fashion industry.

Examining the country of origin from manufacturing and branding in the context of retail and wholesale brands is vital because increasing price competition by different retail brands and wholesale brands since the 1990s (Burns, 2012; Dicken, 2015; Just-Style, 2000; Mellahi et al., 2002) has pushed mass apparel manufacturers, retailers and wholesale brands to produce and source clothing products overseas, and as a result, to increase their revenues (Salmon, 2013); many (historically known as manufacturers) have established their identities as brands/retail brands and/or fashion enterprises, supplying branded products in a range of channels and store, including their own dedicated channels and other third party distributors (e.g. department stores, concession, independent, online etc.).

On the other hand, retail brands that were traditionally known for selling their own product labels within their own stores are also changing their retail strategy by becoming more wholesale-orientated; merchandising their own brand labels within their own exclusive retail stores as well as department stores and e-commerce. Likewise, retailers are also becoming more ‘manufacturer brands’ integrating their supply chain to have more control and to decrease the lead-time (Barnes and Lea-Greenwood, 2006). This evolving structure is making the notion of country of origin even more blurry today, because the notion of

country of origin is relevant and appropriate to all types of retail, wholesale and fashion enterprises; however, the way in which it impacts a business and how they manifest varies depending on retail/brand expertise, brand positioning and strategic business plan.

Furthermore, Chapter 2 on the literature on country of origin previously established that the way in which consumers evaluate product quality is based on where the product is manufactured or where the brand originated from (Samiee et al., 2005). However, based on other studies (Burns, 2012; McCormick et al., 2014), since the 1990s customers' demands and purchasing habits have changed increasingly, and thus, customers' expectations and the effect of country of origin on consumers can also be predicted to change. Thus, this makes it important to evaluate and analyse the importance and impact of country of origin in the fashion industry. The findings of this study will provide empirical evidence from industry experts on the importance and implications of the country of origin dimension in the UK fashion industry.

Furthermore, with reference to the differences between wholesale brands and retail brands, Anselmsson and Johansson (2013)'s study suggests that despite the development of wholesale brands in retail, the distinction between retail brands and wholesale brands can still be made, as retail brands are often visible under one name, whereas wholesale brands are often marketed under different names, although the product can come from the same manufacturer. Additionally, retail brands are often guaranteed a full distribution, with top shelf allocation, whereas wholesale brands have to achieve this through negotiation, which is considered to be costly. Thus, although the literature indicates that wholesale brands and retail brands can be differentiated, however, the blurring between the two still remains an under-researched area, particularly with reference to the concept of country of origin. The next section will present a developing conceptual typology highlighting the proposed themes and patterns. The final model will be developed from the findings of this study, using an inductive approach, illustrating the new theory's development of the notion of country of origin in the context of the UK fashion industry, and that will be addressed in Chapter 6.

Chapter 4: Research Framework Development

4.1. Introduction

This section presents the main issues that will be investigated, which are related to understanding the concept of country of origin from the industry perspective, the importance of country of origin, as well as its impact on the UK fashion industry. Furthermore, the differences between retail and wholesale brands will also be highlighted. Based on the literature review, propositions are formulated and presented under each theme. Following this, a developing typology is put together (see figure 4.1.), supported by tentative propositions to illustrate how the country of origin may impact the UK fashion industry.

As this qualitative, subjective study uses an inductive approach to develop an outcome from the industry perspective; this research will use previous country of origin literature from consumers' perspective to formulate the propositions.

4.1.1. Understanding and importance of COO

As previously addressed in Chapters 1 and 2, country of origin is often associated with the place of manufacture (Miranda and Parkvithee, 2013), characterised by the 'Made in [...] ' label (Miranda and Parkvithee, 2013). Considering the importance of displaying country of origin information in the UK fashion industry, Gov.co.uk, (2013) points out that the legality of manifesting 'Made in [...]' is not a compulsory requirement for clothing products, unless it is childrenswear or footwear. However, Papadopoulos and Heslop (2014, p. 287) added to this by stating that in the UK, any false description of goods is a punishable offense.

In the literature of country of origin, authors (e.g. Pappu et al., 2007; Adina et al., 2015) have indicated that country of origin is considered an important concept, as consumers evaluate the quality of the product based on the place of manufacture (e.g. Ulgado and Lee, 1993), place of design (Adina et al., 2015) and the origin of a brand (e.g. Ahmed and d'Astous, 1995; Samiee et al., 2005). According to Adina et al. (2015), the country of

origin as a quality cue is linked with “reliability, safety and durability, reducing the perceived buying risks” (p.424). Kalicharan (2014) goes further by stating that the perception that “countries manufacture better quality product was based on the country image in the mind[s] of consumers, and that products from industrialized nations were favoured based on the belief that these countries have a long history in manufacturing and that they have to constantly improve their quality to be competitive” (p. 899).

However, other researchers have found that consumers’ perception and use of country of origin in decision-making is changing, as brands manufacture their products in different countries to attain lower labour cost advantages. In addition to this, authors (e.g. Chu et al., 2010; Han and Terpstra, 1998 and Pecotich and Rosenthal, 2001) indicate that this in part is because ‘Made in [...]’ no longer fully corresponds to the home country of the brand, or the place where the product is designed or the material is sourced.

As the country of origin is described as a cue that customers use to evaluate the quality of the product, and thus, this impacts a brand image (e.g. Adina, 2015), there have been many reports about UK companies considering bringing manufacturing back home (e.g. Chesters, 2013). Gov.co.uk (2014) published a press release highlighting that UK companies are increasingly looking to re-shore manufacturing, textiles, software production and call centre work to the UK instead of outsourcing overseas. Gov.co.uk (2014) pointed out that this is due to the strong and stable economy, competitive corporate tax rates, a good regulatory environment, strong legal frameworks and a dynamic labour market. Chesters (2013) reported that bringing manufacturing back home is for quality, cost and delivery purposes. Thus, due to the evolving structure of the fashion industry and the complexity of country of origin linked with sourcing and branding, it is imperative to examine UK fashion industry perceptions of the meaning of country of origin and its importance, and as a result, the following propositions emerged:

P.1. Country of origin has a legal definition linked to the place where the product is manufactured.

P.2. Re-shoring manufacturing will act as a source of brand differentiation.

P.3. Country of origin is closely linked to heritage and history.

4.1.2 Country of origin association and effect, and using COO as a branding tool

In the literature of country of origin, international marketing and consumer behaviour, various studies have documented that consumers' association with country of origin and its effect when making brand purchases are influenced by a range of factors, such as demographic (e.g. Insch and McBride, 2004) and cultural values (e.g. ethnocentrism and patriotism) (e.g. Balabanis and Diamantopoulos, 2004; Josiassen et al., 2008). For example, Balabanis and Diamantopoulos (2004) measured consumers' ethnocentrism (CE) and domestic consumer bias (DBS), and found that consumer preference patterns varied depending on the product category, and thus, home country was not consistently favoured. This finding supported the view that "domestic manufacturers cannot trust their local consumers to grant them any favour over imported goods as a matter of course" (Heslop and Papadopoulos 1993, p. 46). Furthermore, their study also found, in measuring the CE construct, that consumers are more capable of positive bias towards the home country rather than (negative) bias against foreign products from specific countries (i.e. COO effects).

Moreover, various authors have denoted that country of origin association can also be influenced by stereotypical perception of a country image (Kaynak et al., 2000). Adina et al. (2015) explain that a stereotypical perception can be viewed as an asset linked with positive connotation or as a liability when associated with a negative element (Adina et al., 2015). For example, France may have a positive image when it comes to wine, fashion or perfumes, while its association with cars and high technology products is less positive. In addition to this, Koubaa (2008) noted that Hui and Zhou (2003)'s study revealed that the country of manufacture does not produce a significant effect on the evaluation of branded products when the information is congruent with the brand origin (i.e. Sony with Japan).

P.4. Country of origin is closely linked to the perception of a country

P.5. Country of origin dimensions affect brand image perception

On the other hand, Magnusson et al. (2011) propose that the concept of country of origin has become irrelevant, making marketing efforts associating a product with a specific country or culture worthwhile. This is because Usunier (2006) contended that the COO is no longer relevant because COO information has become difficult for consumers to confirm because of the changing label requirement, global sourcing and globalisation of the supply chain. As a result, numerous authors have looked at different marketing efforts of COO, such as brand name (Thakor and Kohli, 1996; D'Astous and Ahmad, 1999; Hsieh et al., 2004; Kotler and Gertner, 2002; Usunier, 2011), foreign brand name strategy (e.g. Magnusson et al., 2011; Leclern et al., 1994), and celebrity engagement or COO effect (Chao et al., 2005).

P.6. Country of brand origin can be communicated through a brand name.

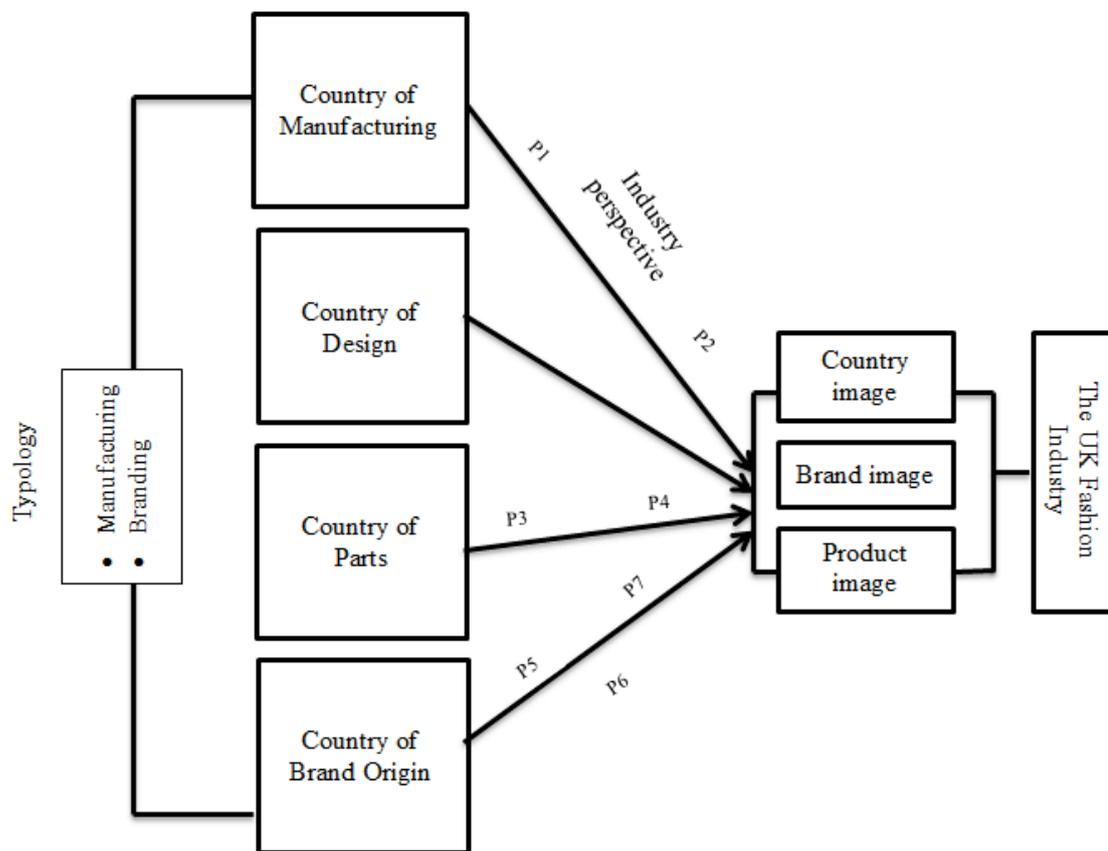
P.7. Country of brand origin can be triggered by other promotional activities.

4.2. Conceptual Typology

Many research studies in the past have concentrated on the country of origin effect or the brand effect on consumer perception and purchasing intention (e.g. Bilkey and Nes, 1982; Verlegh and Steenkamp, 1999; Shi et al., 2016). Moreover, previous studies have looked at a range of product categories and nationalities (e.g. Mostafa, 2015; Shi et al., 2016, Yasin et al., 2007). However, no research to date has examined the impact of country of origin in the UK fashion industry, with specific reference to retail and wholesale brands.

Based on the literature review, the expected patterns between the themes are shown in the following conceptual typology.

Figure 4.1. Conceptual Typology



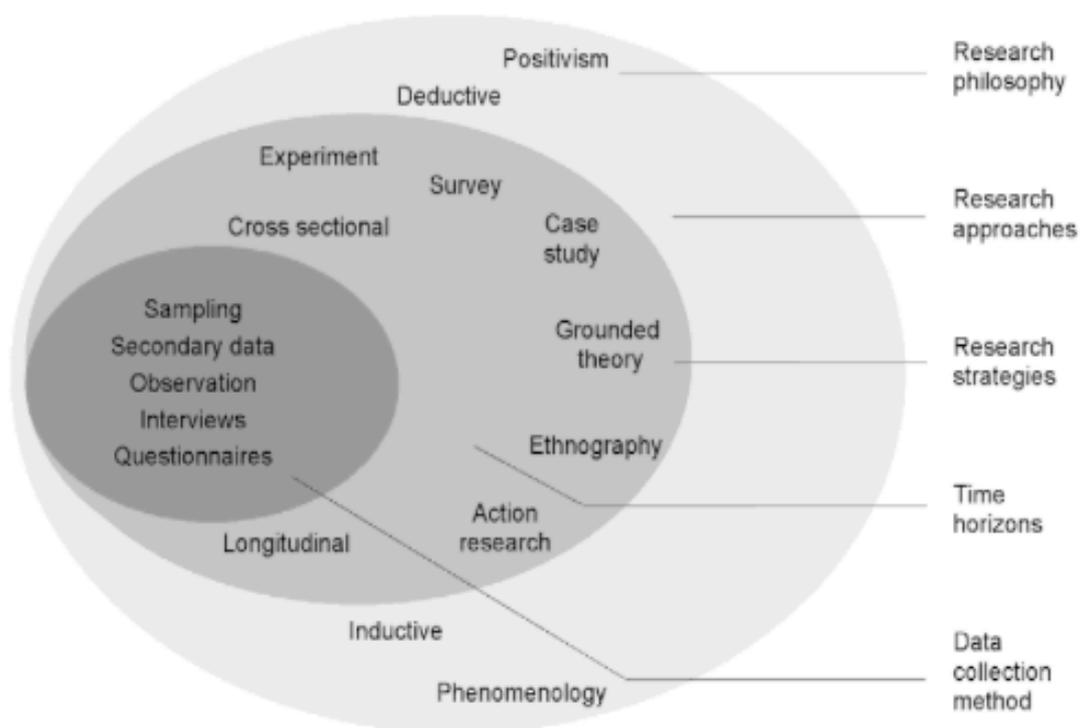
To sum up, this chapter presented propositions that were drawn out from the existing literature of country of origin from consumer perspectives. Following the propositions a developing typology was created to illustrate the characteristics of COO that may impact the UK fashion industry. The next chapter will discuss the philosophy and the methods that were used in this qualitative study.

Chapter 5: Research Methods

5.1. Introduction

According to Saunders et al. (2007), there are several approaches through which a research can be conducted. The research onion (see figure 5.1 below) developed by Saunders et al. (2007) demonstrates the different stages of research, that is, the planning and adoption of an appropriate strategy. This can include the specific methods or philosophies inherent to qualitative or quantitative research (see also Dumke, 2003).

Figure 5.1: The research onion



Source: Saunders et al. (2007)

However, as the focus of this research is qualitative in nature, following Saunders et al (2007) research onion, the first chapter will review the research philosophies and methodology techniques that are available in conducting qualitative research, and the second part (see section 5.11) will demonstrate how the research was carried out (e.g. adopted research philosophies) and the types of research methods utilised to accomplish the aim and objectives cited in chapter 1.

5.2. Research Philosophy

According to Ritchie et al (2013), understanding research philosophy is important because it indicates the assumptions made about the nature of the social world or reality (ontology), and the nature of knowledge (epistemology). In other words, any research design is underpinned by a particular research philosophy (Gray, 2004; Wilson, 2014). According to Easterby-Smith et al (2012) and Wilson (2014), understanding philosophical issues is very useful, because it helps to clarify the research design, which includes identifying the type of evidence required, research methods and the techniques that needs to be used, to collect, analyse and interpret the data. The next section will explain the philosophical underpinnings (ontology, epistemology and methods) of this research.

5.2.1. Ontology

Ontology is defined as a branch of philosophy, concerned with the nature of reality and existence (Easterby-Smith et al., 2012; Wilson, 2014). Wilson (2014) explains that the central aim of ontology in social science is to consider whether the world is external to social actors (objective) or formed from the behaviour and perception of the social actors (subjective) (Bryman and Bell, 2015; King and Horrocks, 2010). This research on country of origin in the context of retail and wholesale brands, is underpinned by a subjective ontology, see section 5.11.3 for more detail. The next section will provide an overview of the two main ontological perspectives.

5.2.1.1. Objectivity

Objectivity is described as a philosophical stance that implies that social entities are based on publicly observable, replicable facts, that are external to the social actors and beyond researchers influence and reach (Bryman and Bell, 2015; Wilson, 2014). In other words, the researcher should not strive to include his or her own feelings and values. Letherby et al (2012) suggests that to be objective in social science means, to commit to '*values of law*' (p. 82), and that those moral principles are valid for everyone. In other words, objectivity is a form of basic 'realism', which suggests that reality exists independent of humans, and the knowledge that is gained is objective and real, based on statistics and facts, using a quantitative approach (Letherby et al., 2012; Bernstein, 2008), and thus, the data is shaped

and structured in a form of theoretical framework, providing statistical evidence (Reiss and Sprenger, 2014).

5.2.1.2. Subjectivity

Subjectivity, also be referred, as ‘relativism’ in natural science (Easterby-Smith et al., 2012) is a view that a person’s approval makes the action morally right (Vaughn, 2012). Easterby-Smith et al (2012) and Gray (2013) assert that social reality is a form of social constructivism, whereby, the researcher makes sense of the world by the perception, knowledge, experience and actions of social actors (Bryman and Bell 2015; Wilson, 2014). Wilson (2014) explains that this is because in a more subjective reality, the researcher needs to attain an understanding on the subjective beliefs and attitudes that may be encouraging a respondent to behave in a certain way. Merriam (2009) and Creswell (2012) have suggested that a subjective view differs from an objective view, in a sense that a researcher does not ‘*find*’ the knowledge, but rather constructs the meanings from lived experience and interaction with others, which can result in multiple meanings.

In summary, the section above provided a discussion on a branch of philosophy ‘ontology’, that deals with something *that exists*, and can addressed by science (objectivism) or the study of being (subjectivism). The next section will provide discussion on another branch of philosophy ‘epistemology’, which deals with theory of knowledge and how people understand the world or something that exists.

5.2.2. Epistemology

Easterby-Smith et al. (2012) and King and Horrocks (2010) have described epistemology as a *theory of knowledge*, especially concerning different ways of addressing this knowledge, including methods, nature, sources, limitation and scope (Jonker and Pennink, 2010) and whether the knowledge is valid (Bryman and Bell, 2015). Number of epistemological positions have been addressed in business and management research, e.g. positivism, post-positivism and interpretivism, (Bryman and Bell, 2015; Easterby-Smith et al., 2012), however, main debate lies between the positivist and interpretivist (or a phenomenological approach, a branch of interpretivism) paradigms. Postivism for example emphasises that the world exists externally, and that it is possible to describe a

theory and to get it right with facts through the objective methods (quantitative approach), which as a result can help to directly determine the phenomenon in question and its existence through the numerical data obtained. On the other hand, phenomenological approach aims to understand the meaning of the phenomena through the lived experience through those in time of that action. For the purpose of this thesis, which is using phenomenological approach, within an inductive paradigm to examine the impact of country of origin on the fashion industry in the context of wholesale and retail brands, whilst dismissing a positivistic epistemology (see section 5.11.3 for justification), the next section provides an in-depth discussion on phenomenological approach.

5.2.2.2. Phenomenology

Phenomenology is described as a philosophy as well as a method, within the interpretative paradigm, which aims to understand a phenomenon from a more subjective standpoint, through the lived experience (Brown and Baker, 2007; Vicars and McKenna, 2014) of respondents at the time of the situation or the phenomenon (Creswell, 2009; Mack, 2010). Vicars and McKenna (2014) explains that the process of the phenomenological approach and method involves studying a small number of subjects with a large and prolonged engagement in order to develop a patterns and relationships of meanings, as well as to understand the paradigm of the world from a new perspective. Therefore, a phenomenological approach is deemed to be integrated with the holistic view of exploring the phenomena through the paradigm of knowledge, experience and subjectivity, such as feeling, awareness, thinking and remembering, emphasizing the importance of personal perspective and interpretation. Furthermore, Easterby-Smith et al (2012) and Willis (2007) have suggested that phenomenology often uses an inductive approach, whereby the researcher identifies the pattern in a data set in order to develop new theories, which gives subjective reasoning a stronger position through the lived experience.

Previously, this chapter has addressed the ontology and epistemology, followed by a justification to the position that was deemed relevant for the study. The next section will discuss the research approaches (deductive and inductive) used in objective or subjective research studies.

5.3. Research Approaches

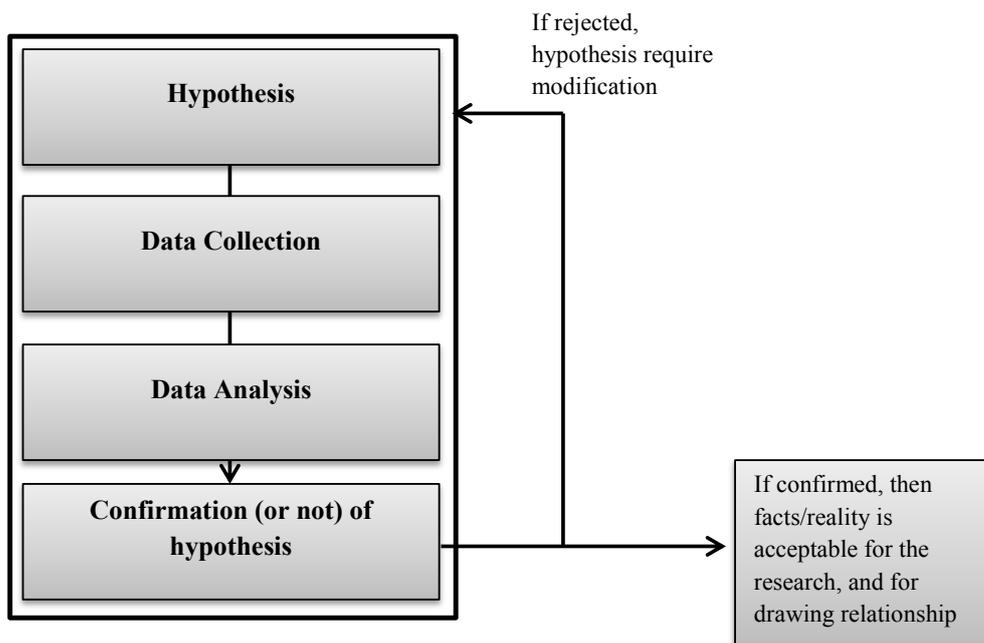
This relates to a process of identifying which research method is best suited to understand the phenomenon under investigation (Kitchen, 1999; Saunders et al., 2009). There are two identified types of research approaches for beginning or planning a research design, and these are: inductive and deductive (e.g. Bryman and Bell, 2015; Easterby-Smith et al., 2012).

As mentioned in section 4.1, this study has utilised an inductive approach to understand the meaning of country of origin from an industry perspective, seeking to provide new knowledge on country of origin with reference to retail and wholesale brands in the fashion context, whilst dismissing the use of a deductive approach (see section 5.11.3 and 5.11.7 for detail). This section will provide an overview on the process of deductive and inductive approach.

5.3.1. Deductive Approach

The terminology “deductive approach” derives from the term deduction, which means “infer from what has preceded in the research” (Morse and Field, 2013, p.6). Savall and Zardet (2011) explains that the deductive approach is often used in studies to test the reality of theoretical objects, which is commonly done in traditional positivist research in order to measure the phenomenon using a numerical quantitative approach. In other words, theories, events, realities are developed and drawn from previous knowledge in a form of hypothesis in order to measure the facts and ascertain any potential relationships (Ali and Birley, 1999; Morse and Field, 2013). Collins (2010) suggests that if the outcome of the research mainly accepts the theory, and then that can be measured as true, or alternatively, the proposition/hypothesis may need to be modified accordingly (see figure 5.1 below). The figure 5.1, illustrates the stages in which deductive approach is processed. The hypotheses are then tested by the development of a framework model (Ali and Birley, 1999).

Figure 5.1: Deductive approach process

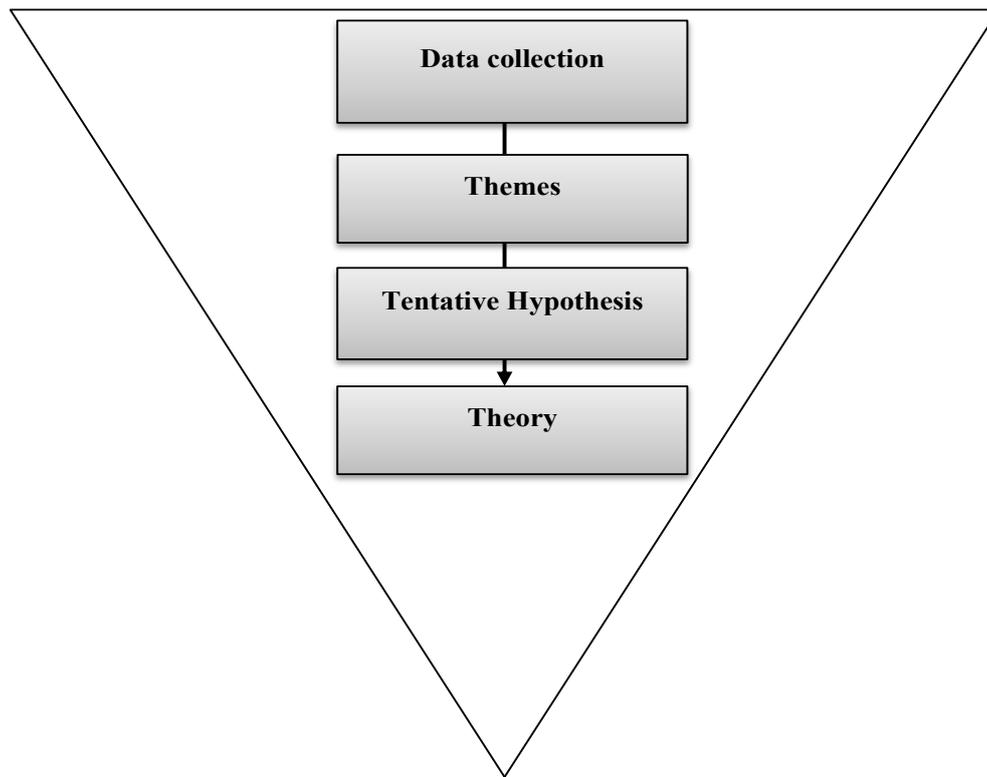


Source: Adapted from Collin (2010)

5.3.2. Inductive Approach

According to Hair (2015), an inductive approach is described as way of ‘thinking’ or ‘theory building procedure’, that involves identifying patterns in a data set in order to reach a conclusion, and to develop new theories. Figure 5.2 below is developed in an inverted triangle, to illustrate how, in order to develop theories or conceptual frameworks, the researcher uses a detailed reading of the rich raw material derived from a qualitative study to draw out the inherent themes and a framework model, which are often interpreted during the interview process (Thomas, 2006). The next stage of inductive approach involves reasoning (or drawing themes), which consists of discovering regularities through the observation of the object or specific phenomenon (see figure 5.2 below). This is done to establish and develop an understanding through the simplification of the phenomena under investigation. Tentative hypotheses or propositions are thereafter developed from the data, and finally new theory (new knowledge) is developed.

Figure 5.2: Inductive approach process



Source: Adapted from King and Horrocks (2010); Thomas (2006) and Saunders et al. (2009)

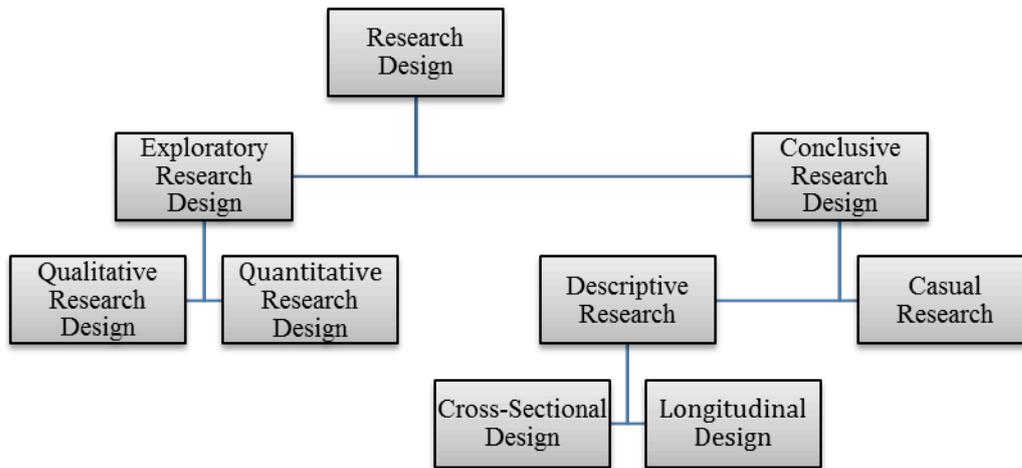
In summary, section 5.3 provided an overview of two research approaches, namely, deductive, which develops and draws realities from previous research in a form of hypothesis in order to mean the facts; and inductive a theory developing process which is adopted in this study to understand the meaning of country of origin from an industry perspectives of the fashion industry, in the context of retail and wholesale brands (see section 5.11.3 for more detail). The next section will discuss different research designs, and how this study fits within exploratory research design can be found in more detail in section 5.11.3 and 5.11.7.

5.4. Research Design Approaches

A research design is described as a framework for conducting a research project (Sumathi and Saravanavel, 2009), which guides the researcher with the procedure necessary for obtaining the information required (Ríos and Campo, 2013). Research designs can broadly be classified into exploratory and conclusive (Rubin and Babbie, 2010; Yin, 2009).

According to Ríos Campo (2013) conclusive can be further classified as either descriptive or casual, see figure below in figure 5.3.

Figure 5.3: A classification of marketing research designs



Source: Adapted from Ríos and Campo (2013)

This exploratory research aims to examine the impact country of origin on the fashion industry, in the context of retail and wholesale brands that have been neglected in the existing literature of country of origin, retail marketing and branding. Thus, The next section will provide a discussion on exploratory research design.

5.4.1. Exploratory

Exploratory research is a methodological approach that is often used for the purpose of finding out what is happening, or to seek new insight into an issue that has not been clearly defined or discovered (Saunders et al., 2009; Yin 2009; Zikmund et al., 2013). In a research study, employing exploratory research often involves an open, flexible, inductive approach to identify and explore new concepts and to develop new theories. This process also allows the researcher to identify the attitude, behaviour, opinions and patterns thereof, and develops a structure of the concepts (Creswell, 2013; Ritchie et al., 2013). To gather every small detail with regards to the research topic, researchers can use different qualitative techniques (Malhotra, 2014; Ríos and Campo, 2013). However Malhotra (2014) has also denoted that quantitative technique can also be used for the purpose of exploratory study (See table 5.1 below).

Table 5.1: Summary of exploratory research design

Exploratory	
Objectives	<ul style="list-style-type: none"> • To provide new insight • To provide understanding
Characteristics	Qualitative or/and Quantitative
Methods	Qualitative <ul style="list-style-type: none"> • Focus groups, qualitative interviews etc. Quantitative <ul style="list-style-type: none"> • Survey of experts, pilot survey etc.
Findings	Tentative

Source: Adapted from Malhotra (2013b)

The next section will discuss the two main data sources, and these are secondary data and primary data, as both have been used in this exploratory research to accomplish the aim and objectives cited in chapter 1.

5.5. Data Sources

The next phase in a research study is to identify data sources available for gathering the information required. Neelankavil (2015) has suggested that there are two types of data sources used in a research project: secondary and primary. Both secondary and primary sources are deemed useful in a research study, because they allow the researcher to develop a basic understanding on the research area, identifying the deficiencies and gaps, establishing new potential research areas, as well as structuring and conducting primary sources to provide new insight or knowledge to an unknown area (Kothari, 2004; Malhotra, 2013b; Nykiel, 2007). As this study has used both secondary and primary data sources to examine the impact that country of origin has on the fashion industry in the context of retail and wholesale brands (see section 5.11.4), the next section will provide overview on the two data sources mentioned.

5.5.1. Secondary Data

In general, secondary data is information compiled, assembled and analysed by another researcher for a different purpose or research question (Crowther and Lancaster, 2012;

Nargundkar, 2012). Neelankavil (2015) has identified two types of secondary data: internal and external. See table below 5.2.

Table 5.2: Differences between internal and external data

Secondary Data	Definition	Examples
Internal Data	Described as data that is generated within a company	<ul style="list-style-type: none"> • Sales records • Financial statements • Advertising & budget reports • Annual reports and distribution costs
External Data	Refers to data generated outside an organisation	Published materials: <ul style="list-style-type: none"> • Newspapers • Journal articles • Industry directories (e.g. Mintel, Euro Monitor and Verdict Retail)

Source: Adapted from Neelankavil (2015)

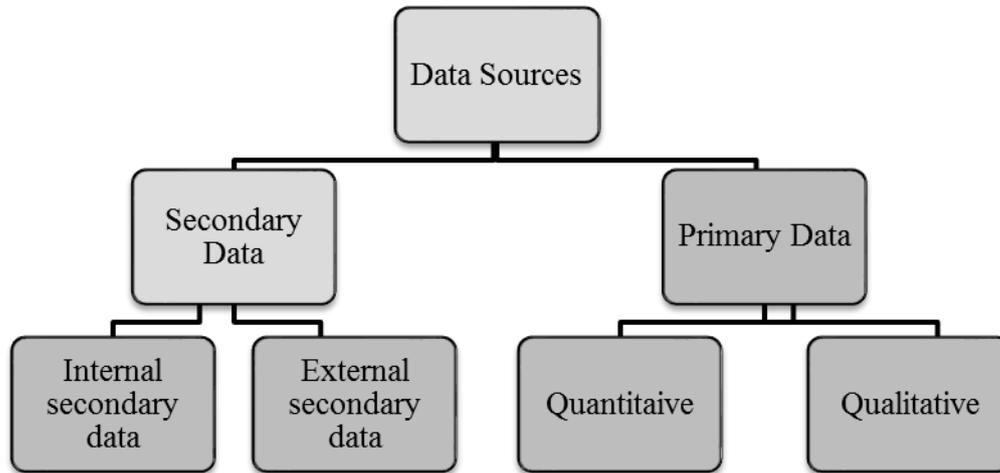
One of the basic fundamental rules of data collection is to extract secondary data for the literature before conducting a primary study (empirical evidence) (Neelankavil, 2015), which enables the researcher to identify the gaps in the literature, as well as provide support with designing and structuring the primary data gathering instrument, such as interviews and/or survey questions, and strengthen the findings, once primary data is collected.

5.5.2. Primary Data

Primary data is described as an empirical method, seeking answers for specific questions and soliciting opinions, or perceptions of an entity that cannot be fulfilled by the secondary data (Nykiel, 2007). The purpose of using the primary data is to gather information that is unknown (Silver et al., 2013). Neelankavil (2015) has suggested that primary data are important because the data collected fits the purpose of the research more precisely and the information gathered is considered reliable and accurate as it is collected first hand, by the researcher (Ghauri and Grønhaug, 2005), and also provides new insight to an unknown area. At the broadest level, primary data can be classified as qualitative and quantitative

(see figure 5.4 below) (Neelankavil, 2015), which can be further subdivided into distinctive methods of data collection (Wiid and Diggines, 2010), refer to figure 5.4.

Figure 5.4: Research data sources



Sources: Silver et al (2013), Gray (2013) and Wiid and Diggines (2010)

To summarise, numerous benefits and drawbacks of both secondary and primary data sources have been identified (e.g. Bryman and Bell, 2015; Easterby-Smith et al., 2012; Gray, 2013; King and Horrocks, 2010; Silver et al., 2013; Nykiel, 2007), and their implication on this research of country of origin in the context of retail and wholesale brands will be addressed in the analysis chapter 6 and 7.

Furthermore, Nargundkar (2008) has suggested that designing and collection data largely depends on the targeted population, depending on the accessibility with the sampling population and the impact it would have on the outcomes in a sense that the research would contribute theoretical and practical knowledge. Thus, the next section will discuss sampling procedures, data collection methods, and validity and reliability with qualitative research design.

5.6. Sampling Approach

According to Kothari (2004) and Yin (2015), sampling is basically a process of selecting participants (or subsets of a population), that is selected using sampling techniques based on the nature of the study. Authors (Easterby-Smith et al., 2012; Kothari, 2004; Ríos and Campo, 2013; Yin, 2015) have indicated two types of sampling techniques: non-probability and probability.

As this subjective, exploratory research is looking to examine the impact country of origin has on wholesale and retail brands from the industry perspectives, this research has used non-probability, judgemental sampling technique to select key informants from the fashion industry, incorporating retailers, manufacturers and textile/fashion companies (see section 5.11.5 for detail on the purpose and procedure of the sample selection).

5.6.1. Non Probability Sampling

According to Ríos and Campo (2013) non-probability sampling is also referred as a non-random method (Babbie, 2016; Bryman and Bell, 2015; Easterby-Smith et al., 2012). The four major non-probability techniques include judgement sampling, convenience sampling, snowball sampling and quota sampling, illustrated in table 5.3.

Table 5.3: Nonprobability sampling techniques

Sampling Techniques	Nature of Sampling Techniques
Judgmental Sample	<ul style="list-style-type: none"> Also referred to as a purposive sample, is a technique in which the researcher deliberately selects factors that are considered representative of the population. Respondents are selected according to the criteria to meet the requirement of the study.
Convenience Sample	Also referred to as an accidental sampling, is a technique that involves sampling a population unit with the convenience of accessibility, availability and willing to respond.
Snowball Sample	<ul style="list-style-type: none"> In this technique, the researcher searches for the member of special, hidden population those are difficult to identify via traditional approach of contacting the informant directly. Thus, the procedure relies on a series of referrals that are made within a circle of groups, people and contacts in order to research the hidden population that may have knowledge, experience and influence on a phenomenon.
Quota Sample	Quota sampling comes in two stages: <ul style="list-style-type: none"> The sampling begins with a matrix or a table, describing the characteristics of the target population. Depending on the research purpose, the matrix may need categorises population based on the

-
- demographics population, specific attitude, or specific behaviour.
 - The next stage is to select the respondents, which is on the basis of researcher's judgement in establishing the categories and choosing the sample from the categories.
-

Source: Adapted from Malhotra (2013b); Easterby-Smith et al (2012) and Babbie (2016)

Section 5.6 provided a summary of sampling techniques identified in qualitative research methods. The next section will provide an overview of the data collection methods and instrument that were considered in order to accomplish the aim and objectives stated in chapter 1.

5.7. Qualitative Data Collection Processes and Methods

According to Malhotra (2014), qualitative research is a process to gain an insight into, and understanding of, the problem setting or phenomenon in question through the experience as its '*lived*', '*felt*' or '*undergone*' by the participants (Braun and Clarke, 2013; King and Horrocks, 2010), and this is described as an interpretivist approach (Littler, 2006). In other words, qualitative research is adopted with the aim to explore and interpret the underlying experience, reasoning, opinion, motivation, behaviour and interpretation of respondents (Miles and Huberman, 1994), generated in non-numerical data.

A number of techniques have been identified for qualitative research techniques i.e. interviews and focus groups. Various authors (Bryman and Bell, 2015; Kothari, 2004; Saunders et al., 2009) have recommended two common techniques, the qualitative interview or the focus group technique. In this study, the term qualitative interview is being used as an alternative to semi-structure and in-depth interview, as Yin (2015) has suggested that qualitative interview has become significantly diverse, depending on different circumstances, which may include a combination of both in some cases.

5.7.1. Qualitative Interview

The qualitative interview is a process of gathering information or opinions through a conversation, seeking answers by asking questions and listening as well as responding to the questions or answers (Gubrium and Holstein, 2001; King and Horrocks, 2010).

Qualitative interviews can be structured or semi-structured, designed to draw information from the individual targeted audience.

Table 5.4: Qualitative interview techniques

Types of Interviews	Nature of Interview Techniques
Structured interview	It is a process in which researcher comes with the set of structured questions. The set of questions remain the same during the interview process, and the same sets of questions are repeatedly asked from all the participants.
Semi-structured interview	Also referred as depth interviews or unstructured interview, are described as a loosely structured or interview with a single person, probed to uncover the underlying motivation, belief, attitude, and feeling of the topic

Source: Adapted from Malhotra (2013)

These techniques (see table 5.4) allows the researcher to gain insight and knowledge from respondents, observe their behaviour, and finally develop a social interaction (King and Horrocks, 2010; Ritchie et al., 2013). Furthermore, Gubrium and Holstein (2001) explain that the epistemology of the qualitative interview relates to subjective ontology and interpretative epistemology, rather than a positivist epistemology; with the purpose of developing an understanding, rather than obtaining facts from the respondent's conversation.

5.7.2. Focus Group

According to authors (Gray, 2013; Ho, 2006; Krueger and Casey, 2014), a focus group is described as a process which involves interviewing a small group of people, in a form of discussion, to determine motivation, belief, attitude, and how participants may feel about the phenomenon under an investigation. According to and Littler (2006) and Malhotra (2013) the discussion relies on the interaction within a group, which is unstructured and free flowing, or in a form of a debate.

Section 5.7. provided a summary of the interview techniques used in qualitative research. The next section will discuss the qualitative analysis approaches through which themes or phrases are drawn to interpret the data.

5.8. Qualitative Data Analysis Method

In qualitative research there are two main types of analysis methods, and these are content analysis (Easterby-Smith et al., 2012), thematic analysis (King and Horrocks, 2010). These qualitative analysis methods allow the research to draw the meaning in a form of patterns or themes, and can be done using Nvivo or manually. The differences between these two methods will be addressed below, and again, the justification and procedure of using thematic analysis approach manually in this research will be discussed below.

5.8.1. Content Analysis

Content analysis is described as an analysis approach that helps to make an interpretation about theoretically relevant problems (Dwyer et al., 2012), using a systemic coding and categorising approach. This enables the researcher to explore a large amount of textual information in order to understand the meaning of the trend and pattern of words used, often done by counting the amount of times the frequency occurs, along with their relationship in the structure and the discourses of the communication. This type of analysis approach is commonly used in research studies that are examining archival material (Dwyer et al., 2012) or historical artefacts (Easterby-Smith et al., 2012), for example, media, visual images and actions (Miles and Huberman, 1994) etc. Furthermore, this process is considered to be useful when identifying the similarities, differences and observations within the structure of the research subject (Dwyer et al., 2012). Furthermore, Dwyer et al (2012) explains that content analysis can be done quantitatively and qualitatively.

5.8.2 Thematic Analysis

Authors (Braun and Clarke, 2013; Harper and Thompson, 2011) have suggested that thematic analysis is an approach, whereby the researcher systematically identifies and analyses the patterns of the meaning derived from a set of data. This approach allows the researcher to illustrate the themes that are considered important in the description of the phenomenon under a study.

In thematic analysis, King and Horrocks (2010) have identified three key stages. Table below 5.5 summaries these stages.

Table 5.5: Stages in the process of thematic, template analysis

Stages	Procedures
Stage one: descriptive coding	Also referred as higher code. This involves drawing or generating themes from the literature, interview questions or through the transcript of the interviews.
Stage two: Interpretative coding	Clustering descriptive codes and compiling under the themes to develop an understanding on the ‘meaning’ of the research question. This can be done using Nvivo or manually.
Stage three: Overarching themes	Representing the relationship between the level of coding and analysing via constructed diagram, framework model or developed typology.

Source: Adapted from King and Horrocks (2010)

Previously, this section had addressed different qualitative analysis approach, e.g. content and thematic approach. The next stage of this chapter is to indicate data collection strategies that makes a qualitative study credible and validates the research.

5.9. Data Collection Reliability and Validity

In qualitative research, reliability and validity are concerned with the accuracy and the truthfulness of the findings (Kirk and Miller, 1986; Maxwell, 1992). In qualitative research, terms such as credibility, transferability, dependability and conformability are used to illustrate the quality of the research. To be more precise, ‘dependability’ in qualitative research is used to closely correspond to ‘reliability’ (Lincoln and Guba, 1985, p.300). These terms are described below in table 5.6.

Table 5.6: Qualitative reliability and validity definitions

Methods	Nature of Methods
Credibility	Refers to the adequate representation of the constructions of the social world under the study. It is comparable to internal validity, which involves the extent to which the results are credible and believable, from the perspectives of the participants.
Transferability	Is comparable to external validity. This involves thick description and an extensiveness of the data collection, allowing the results to be transferred to some other context or settings. It is the researchers task to provide an index of transferability, rather, he or she is responsible for providing data sets and descriptions that are rich enough, so the other researchers are able to make judgement about the findings transferability to different settings or context.
Dependability	Is comparable to reliability. This refers to the stability of finding the same results, if the observation takes place twice. It is determined by checking the consistency of the study process. In other words, is it the coherence of the internal process through which the researcher accounts for changing conditions of the phenomena.

Conformability	This is comparable to objectivity, which refers to the extent to which the internal coherence/characteristics of the data, which can be verified or confirmed by others who read or review, in relation to the findings, interpretation and recommendation.
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Sources: Adapted from Klenke (2015)

To give quality, credibility and trustworthiness to a qualitative research, certain methods can be used, such as triangulation, member checking, and self-disclosure (reflexivity), and these have been summarised in table 5.7 below.

Table 5.7: Qualitative validity strategies

Methods Strategies	Definition
Triangulation	Refers to use of more than one approach, such as different sets of data, different types of analyses and/or different theoretical perspectives to study the research question.
Member Checking	Described as a quality control process by which a researcher seeks to improve the accuracy, credibility and validity of what has been recorded during the research interview.
Saturation	Saturation is a term used to describe a process in which data collection is continued with the informants /participants until assembled data replicated the earlier ones. This provides adequacy when saturation and variants are both accounted and understood/
Reflexivity	Described as self-awareness and critical self-reflection of the potential biases and predisposing that may later affect the research process and the final conclusion of the study is drawn.

Sources: Adapted from authors (Lincoln and Guba, 1985; Goodwin and Goodwin, 1996; Klenke, 2015)

For the purpose of this research, which is using person triangulation approach and saturation point to validate the research, this section is also indicating three types of triangulation approach, summarised in table 5.8, and these are, are 1) time, 2) space and 3) person

Table 5.8: Triangulation approaches

Triangulation Approaches	Strategies
Time Triangulation	Researcher collects data about a phenomenon in a different point of time (e.g. time, day, weekly, etc.).
Space Triangulation	Consists of collection data at more than one site, i.e. researcher might collect data at more than one unit of the fashion industry
Person Triangulation	Researcher collects data from more than one <i>level of person</i> that could be a set of individuals, groups or collectives.

Source: Adapted from Speziale et al (2011, pp. 351–353)

5.10. Summary

This section has provided an overview of the philosophical methodologies, data collection methods, analysis methods and validity and reliability procedures that are available for conducting a research. The next section will provide a discussion and justification on the philosophical methodology that underpins this research, as well as the method and the procedure of conducting the research in order to accomplish the aim and objectives cited in chapter 1.

5.11. Justification of the Adopted Philosophies and Methods

The following section presents a justification of the underpinning philosophy, research design and data collection method utilised to accomplish the aim and objective cited below and in chapter 1.

5.11.1. Research Aim

The aim of this research is to examine the impact of country of origin on the UK fashion industry, with specific reference to retail and wholesale brands.

5.11.2. Research Objectives

In order to achieve the research aim, the following objectives have been identified:

- 1 – Examine the current literature on country of origin with particular emphasis on evaluating the components and different concepts of country of origin, in the specific context of retail brands and wholesale brands in the fashion industry.
- 2– Investigate industry perceptions of country of origin via a series of key informant interviews from the fashion industry incorporating retailer and manufacturer perspectives.
- 3 – Analyse data to develop a typology of strategic actions with regard to the optimum use of the various dimensions of the COO concept in the context of the UK fashion industry.

5.11.3. Underpinning Research Philosophy

The ontological position, which underpins the design of this study, is subjectivity. As stated in section 5.11.1, the purpose of this research is to examine the impact country of origin has on the UK fashion industry with specific reference to wholesale brands and retailer brands. This subjective research is seeking to develop an understanding of the complex notion of country of origin from the perspective of the fashion industry representatives, which encompasses aspects of both manufacturing and branding with reference to retail and wholesale brands. As this thesis is looking to develop an understanding on the meaning, importance and use of COO from an industry perspective, encompassing different levels of key informants (e.g. store manager, assistant buyers through to CEO), and thus, the findings can provide multiple meanings and multi-interpretations as suggested by Creswell (2009) and Merriam and Tisdell (2015).

Furthermore, to understand the complex phenomenon of country of origin in the fashion industry, as to what country of origin means, and the implication of country of origin in different retail and wholesale brand contexts, as well as how country of origin is used as a branding tool in the context where things have blurred between retail and wholesale brands, this study has adopted a phenomenological, non-positivistic approach. This is because a phenomenological approach will allow the researcher to develop a better understanding of country of origin through the lived experience of the world in which the participants inhabit (King and Horrocks, 2010; Mack, 2010), and thus, a positivistic approach was dismissed, which involves formulating a law or principle to measure a phenomenon based on the existing *facts*.

In addition, previously, in section 5.2, two types of research approaches have been identified: deductive and inductive. This study has adopted an inductive approach, a *theory building* process (Hair, 2015), in order to establish new knowledge on the complex notion of country of origin from and industry perspective in the context of the fashion industry. According to Thomas (2006) and Hair (2015), the inductive approach involves drawing out themes from the rich qualitative data. Similarly, to understand industry perceptions, and implication of, country of origin in the context of fashion retail and wholesale brands, as well as to re-examine the definition of retail brands as asserted by Davies (1992), this study has used inductive, thematic analysis approach to draw the

meanings from the rich qualitative data, and thus, dismissed the use of a deductive approach, which looks at testing the hypothesis and measuring the fact. The procedure of using thematic analysis approach in this research study will be discussed in detail, in section 5.11.7.

Furthermore, this qualitative research study has adopted an exploratory research design to develop an understanding of country of origin from manufacturing and branding aspects of the fashion industry, with specific reference to retail and wholesale brands.

An exploratory research design was adopted because Malhotra (2013a) has found that various authors (e.g. d'Astous and Ahmed, 1999; Verlegh and Steenkamp, 1999; Laroche et al., 2005) have previously employed survey or experimental techniques to access the impact on the outcome variables such as, attitude, belief and evaluation, product choice and product attributes. While a large number of studies have documented country of origin effect on consumer perceptions and purchasing behaviour in various context and product categories (Malhotra, 2013a), the processes and concepts underlying country of origin from the industry perspectives of the fashion industry has been neglected, particularly in the context of retail and wholesale brands, in the literatures on country of origin, retailing, marketing and branding. Thus, to contribute new knowledge of country of origin with specific reference to wholesale and retail brands, this exploratory study has used qualitative, interview approach with the key informants of the fashion industry, whilst dismissing conclusive research design that uses a quantitative approach.

5.11.4. Data Sources

The first stage of this research was to examine the current literature on country of origin with particular emphasis on evaluating the components and different concepts of country of origin, in the specific context of retail brands and wholesale brands in the fashion industry. Previously in section 5.5, two types of data sources have been identified through which the data can be obtained, and these are secondary and primary data sources.

In section 5.5, numerous benefits and drawbacks of both secondary and primary data sources have been identified by authors (e.g. Bryman and Bell, 2015; Easterby-Smith et

al., 2012; Gray, 2013; King and Horrocks, 2010). However, both sources (secondary and primary data) were considered important in this research, in terms of identifying the gaps, providing evidence to the unknown, and making the findings trustworthy and valuable. Consequently, both data sources were used to accomplish the aim and objectives cited in chapter 1 and in this chapter.

In particular, secondary data was used because it helped in developing basic understanding on area of country of origin, as well as understanding the differences between retail and wholesale brands, as previously proposed by Davies (1992), allowing the researcher to not only identify the gap in the literature, but also to structure the primary data collection.

In section 5.5, two types of secondary data sources have been identified (internal and external), and they have both been used in this study, and these were internal secondary data (annual company reports) to support evidence with reference to retail and wholesale brands, and external data source (e.g. Mintel and Keynote reports and academic journals) to develop an understanding on the notion of country of origin.

As mentioned earlier, one of the benefits of compiling information using secondary data sources were that it was considered less expensive and less time consuming. However, several limitations were also identified using secondary data sources, such as, some secondary data was dated and not expressed in the same way as the research projected, as suggested by (Saunders et al., 2009), and therefore, was not always considered entirely relevant to the research area. For instance, in this research study, supporting evidence from the secondary data, such as country of origin literature was compiled from consumer perspectives, with reference to a range of product categories. However, there was little evidence with reference to fashion and industry perspectives. Secondly, the definition of retail brand, as proposed by Davies (1992) was dated, and the existing literature mainly indicated the differences between retail and wholesale brands (Ailawadi and Keller, 2004; Davies, 1992; Keiser and Garner, 2012; Martenson, 2007). However, no research to date has looked at country of origin impact on the fashion industry, with specific reference to retail and wholesale brands. Thus, qualitative primary data sources were designed to address this gap and to accomplish the aim and objectives cited in chapter 1 and in section 5.11.

Furthermore, Nargundkar (2008) has previously suggested that designing and collecting data largely depends on the target population, which also includes consideration of issues such as the accessibility with the sampling population and the impact it would have on the outcomes in a sense that the research would contribute to theoretical and practical knowledge. Thus, the next section 5.11.5 will discuss the procedure involved in identifying the sample and how this supports in qualifying and making the study trustworthy.

In addition to this, one of the key benefit of using the two data types were, that primary data supported in providing new insight to the meaning and implication of country of origin in the context of retail and wholesale brands, and once the data was collected, the secondary data was used again in places where it was considered relevant, in terms of comparison with the primary data, which enabled to strength the finding, making the study valuable and reliable (see the finding/analysis chapter 6 and 7).

5.11.5. Sampling Technique and Procedure

As mentioned earlier in this section 5.11, this subjective, exploratory research has employed a phenomenological, qualitative approach to gain an in-depth understanding of the *meaning* of country of origin in the context of retail and wholesale brands. To carry out this research, the study initially intended to interview representatives of fashion retail and wholesale brands.

The sampling process started by using a key informants approach to respondent selection (Barnes and Lea-Greenwood, 2006), whereby, respondents were chosen using a non-probability, judgement sampling approach, because of their knowledge and influence on branding and manufacturing strategies. As the researcher started identifying and interviewing the first few key informants of the fashion industry, it became apparent that it was difficult to truly find distinct retail and distinct wholesale brands. Consequently, an approach was adopted whereby the researcher looked at a range of fashion brands, from retailers through to wholesale brands, which included different hybrid types of brands in between, such as, design led brands, multi-channel retailers, all of whom (apart from one) were using both retail and wholesale brand strategy.

To strengthen the findings, the researcher then took an approach to look at the industry as a whole, as it was difficult to fit retailers in the category of retail and wholesale brands, and as a consequence, key informants were also selected from fashion businesses including garment suppliers, component suppliers and textile and fashion consultancy companies. As the interview process continued (see section 5.11.6), some new themes emerged from the qualitative interviews, such as some component suppliers are in the process of developing and expanding the supplying business into a fashion brand. The blurriness of fashion retail and wholesale brands, and the expansion of suppliers into fashion brands will be discussed in more detail in chapter 6.

Thus, non-probability, key respondent approach was adopted because Saunders et al (2009) suggested that non-probability is deemed more practical for exploratory research, which was considered useful because it provided new findings on the blurred differences between retail and wholesale brands (see chapter 7), but also provided rich information on the complex notion of country of origin in the context of fashion retail and wholesale brands.

Furthermore, the samples of key informants chosen from the fashion industry were at different levels within their respective organisations (e.g. assistant buyers to CEO). This was considered useful, because as addressed by Speziale et al (2011) the data collected from one level of a person can be validated by second or third person (see table 5.8), referred as a person triangulation approach. Using person triangulation approach, this study comprised 23 semi-structured, face-to-face interviews with key informants representing 17 UK fashion brands and organisations (See table 5.9 below), incorporating both retailers and manufacturers, all of whom incorporate COO as part of their overall branding strategies (see interviews in appendix 1.2.). However, the 17 fashion companies addressed below in table 5.9 also comprises textile and fashion consultancy companies, that were utilised to support and strength the research findings. For the reason of commercial confidentiality, participant organisations cannot be identified.

Table 5.9: Key informants of the UK fashion industry

Company	Organisation Type	Interviewee Position
Company A	Pure own brand - fast fashion retailer	1) Buyer (a) 2) Buyer (b) 3) Wholesale Coordinator
Company B	Pure own brand - quality led retailer	1) Head of Department 1) Assistant Buyer
Company C	Premium brand - performance design led retailer	1) Senior Designer 2) Junior Designer
Company D	Premium brand - performance design led retailer	1) Buyer
Company E	Premium retailers – own fashion brand	1) Store Manager
Company F	Premium brand - Premium design led retailer	1) HR Manager
Company G	Premium brand - wholesale brand and manufacturer	1) CEO
Company H	Premium fashion - Manufacturer brand	1) Marketing Director
Company I	Premium fashion retailer	1) Creative Art Director
Company J	Multi-channel retailers – wholesalers and own brand retailers	1) Head of Department 2) Senior Buyer
Company K	Multi-channel own brand retailer	1) Assistant Buyer 2) Buyer
Company L	Component supplier	1) President of Apparel and Footwear
Company M	Component suppliers and brand	1) Non-Executive Director
Company N	Clothing manufacturer and suppliers for high street fashion retailer	1) Technical Manager
Company O	Designers and manufacturers for design led brands	1) Senior Fabric Technologist
Company P	Textile research and funding organisation	1) Textile Researcher
Company Q	Textile research and funding organisation	1) International Director

With no existing database on experts within fashion retailers and manufacturers to provide a sampling frame, a list of respondents was devised using a variety of sources. The key informants from retailers, manufacturers and other fashion industries (e.g. textile and fashion consultancies) were identified via LinkedIn (2014), The Association of Suppliers

to the British Clothing Industry (ASBCI) (2014), the fashion networks event (2015), as well as personal contacts. These events were considered beneficial for this study, as the key speakers were representatives on the fashion industry, incorporating retailers and manufacturer, and were invited to the event to discuss the importance 'Making it in the UK'.

All the key informants from retailers and manufacturers, as well as textile and fashion consultancies were approached via a three-stage process. The first step was to approach the informants by a formal letter, which explained how the information was going to be used and how the company's name would not be identified in case of any academic publication. The next stage was to follow up the key informants from retailers and manufacturers, as well as the textile and fashion consultancies with an email, if the key informants had not responded after a given time period. Finally, the third stage was to follow up with a phone call, again, if there was no response from the participants. However, where it was possible to identify the name and email of the person responsible for manufacturing the fashion companies (e.g. CEO and Director of Marketing etc.) via personal contacts, the informants were contacted directly. As mentioned in this chapter; refer also to the table 5.9, the key informants from the specific companies were originally chosen because they were considered representatives on retail brands, as defined by (Davies, 1992; McColl and Moore, 2014), and wholesale brands (Glynn et al., 2012; Keiser and Garner, 2012; Salmon, 2013), and also because the way used country of origin as a branding tool within their product and/or service to develop a brand identity. However, as mentioned earlier in this section 5.11.5, after interviewing the first few key informants representatives on retail and wholesale brands, it became apparent that the differences between the two have increasingly blurred, and thus, the companies could not be categorised in retail and wholesale brands. Consequently, the approach was adopted, whereby the fashion industry was looked as a whole.

The next stage was to interview the key informants of the UK fashion industry. Before conducting the actual interview, pilot testing took place with the former assistant buyer of a fashion retail brand that provided support in structuring the interview questions more effectively and considering the laddering technique to probe the questions. The next section will illustrate the interview process and the instruments that were used to carry out this research.

5.11.6. Interview Process and Instruments

As mentioned earlier, this study has used a qualitative interview approach to collect data with the key informants within the fashion industry, encompassing retailers and manufacturers, as well as textile and fashion consultancies to achieve greater precisions on the meaning and implication of country of origin, with specific reference to the fashion industry, in the context of retail and wholesale brands. In particular, the approach involved using semi-structured interviews, which allowed the researcher to probe the respondent.

The questions for the semi-structured interview derived from the literature review (see table 5.10) of country of origin (e.g. Ha-brookshire and Yoon, 2012; Insch and McBride, 2004; Miranda and Parkvithee, 2013; Pecotich and Rosenthal, 2001; Yasin et al., 2007) branding (e.g. Aaker, 1991; Keller, 2002; White, 2012) retail and wholesale branding (e.g. Ailawadi and Keller, 2004; Broyles et al., 2011; Davies, 1992) , and fashion management studies (e.g. Barnes and Lea-Greenwood, 2006; Birtwistle and Freathy, 1998; Doherty, 2000).

The interview process started with a very basic question, inquiring about informants' role, the length of employment and about the company's background (refer to fig 5.13). The next step of the interview process was to investigate whether the companies referred themselves as brands, if so, what type of brand (e.g. retail brand or wholesale brands, manufacturers, business to business brands etc.), as perceived by the respondent (see to question 3 in fig 5.13). To gain deeper understanding on whether companies operated retail or wholesale brand strategy, ladder technique was adopted by probing the questions on whether companies sold their own brands in their own store or in other stores and channel, and if they could explain the advantages and disadvantages tied with selling other brands in their store and vice versa. According to Reynolds and Gutman (1988), laddering involves a series of directed probes, typified by "Why is that important to you?" question, with the express goal of determining the association between the key perceptual elements across the range of attributes, consequences, and values. The purpose of using ladder technique in this qualitative interview process was, because the terminology retail and wholesale brands is no longer frequently used in the UK fashion industry. Thus, ladder technique helped to determine that many retail respondents were using both retail and wholesale brand strategy (see chapter 7), and how many manufacturers had transformed into retail oriented business.

However, where needed, the key informants were probed by asking if any changes had taken place in the structure of brand or company (i.e. retailers becoming wholesale brands or vice a versa) to make them think in that way. This was followed by another question about what implications did these changes (retail brand becoming wholesale brand and vice a versa) have on the company? These questions provided an overview of the company, and allowed the researcher to gain an insight to the changes that have occurred within the fashion industry with reference to retail brands becoming wholesale brands and vice versa, consequently becoming one of the key findings of this research, having a lot of implications for the perception of country of origin (see chapter 6).

To accomplish the objective 2, the next stage was to understand the concept of country of origin. To develop an in-depth understanding, the questions were adapted from COO literature from consumer perspectives, for instance, a question was adapted from Peterson and Jolibert (1995) with reference to informants 'understanding of the term country of origin' (refer to question 6 in table 5.10), questioned as "what do you understand by the term country of origin?". This question emerged from Peterson and Jolibert (1995) study, pointing out how is often country of origin is communicated in a phrase 'Made in [...] referring to the place where the product is manufactured (see proposition 1 in chapter 4).

Furthermore, numerous authors (Acharya and Elliott, 2001; Chao, 2001; Ha-Brookshire, 2012; Inch and McBride, 1998; Mostafa, 2015) have examined different country of origin components' (e.g. country of design, country of parts, country of manufacturing and country of brand origin), effect on consumers. Consequently, this was adapted, and industry informants were asked the second question "Which dimension do you think is more credible or effective in your opinion?" The questions were probed by pointing out the different components. If respondents said all of them, then the respondents were questioned further, by asking if they could tell the importance and use of each of the constructs. For instance, "Could you please tell me why is country of manufacturing important?" and "How do you use it as part of your overall branding strategy?", linking to question number 8 and 14. These questions were asked in relation to understanding whether bringing manufacturing back home, to the UK, would work as a unique selling point, and whether the responses had any association to heritage and history (see chapter 4, proposition 2 and 3).

The respondents were then asked about the relationship country of origin has with a brand (Diamantopoulos et al., 2011; Dicken, 2015). This question was linked to proposition 4 in chapter 4 as to how country of origin is closely linked to a reputable country image. This was to understand the concept of country of origin in the context of manufacturing and branding, and thus, the question was probed by asking why companies manufactured in certain countries, and the relationship country of origin has to a brand. The response was often provided concerning the importance of having a good relationship with suppliers. Thus, to gain a deeper understanding from branding perspectives, companies were often asked whether they communicated country of origin through a brand name and/or if there were any other ways they communicated. This aligned closely to proposition 5 and 6, concerning communication strategies (see chapter 4). Following this participants were asked if country image had any impact on brand image. Table 5.10 illustrates the form in which the questions were originally set out.

Table 5.10: Interview schedule for the industry experts

Interview Questions	Literature Adapted
1) Could you please tell me your role?	Innes, 2013
2) Length of employment?	Conway, 2014
3) Could you please tell me a bit about your brand?	Conway, 2014; Diamantopoulos et al, 2011
4) Would you refer your brand as a retail brand or wholesale brand, or manufacturer?	Anselmsson and Johansson, 2013; Davies, 1992; Glynn, 2010
5) How does a manufacturer brand differ from a retail brand? There has been a shift in retail and manufacturer brands, what implication has this had on your brand?	Anselmsson and Johansson, 2013; Glynn and Brodie, 2012
6) What do you understand by the term country of origin?	Peterson and Jolibert, 1995
7) Which dimension do you think is more credible or effective in your opinion? (COB, COP, COD, COM)	Acharya and Elliott, 2001; Chao, 2001; Ha-Brookshire, 2012; Insch and McBride, 1998; Mostafa, 2015
8) Do you use any of the COO constructs as a branding strategy?	Balabanis and Diamantopoulos, 2011; Magnusson et al, 2011; Usunier and Shaner, 2002; Usunier, 2011
9) What does your brand name say about your brand? How does (or not) is it associated to its country of origin?	Usunier and Shaner, 2002; Usunier, 2011

10) How important (or not) do you think is the relationship between a brand and its country of origins in general?	Dicken, 2015; Sharma, 2012
11) Do you carry out brand perceptions?	Parrott et al., 2015; Wänke et al., 2007
12) What are the results/outcomes of this research, and how is this used to develop branding strategies for the upcoming future?	Usunier and Shaner, 2002; Usunier, 2006, 2011
13) How does country image impact a brand image?	Ahmed et al., 2002; Koschate-Fischer et al., 2012; Koubaa, 2008
14) Could you think of other ways through which you branded products or service emphasis on country of origin? (e.g. online, customer service, in-store etc.)	Balabanis and Diamantopoulos, 2011; Godey et al., 2012; Salmon, 2013; Usunier, 2011
15) What implication does COO have on your brand message and how does it impact the brand image?	Guercini and Ranfagni, 2013; Hamzaoui et al., 2011; Yasin, Noor, and Mohamad, 2007

Nevertheless, many questions were not asked in the same order as listed above, as key informants were already briefly aware of the research topic, and thus, often jumped straight into providing information regarding country of origin. On the other hand, with some key informants (e.g. manufacturing and textile and fashion consultancy companies), questions regarding retail and wholesale brand implications were not considered entirely relevant. Nevertheless, it emerged from the results that some component suppliers also regarded themselves as brands, or was in the process of establishing their identity as a fashion brand (refer to appendix 2). However, along with these finding, the key informants from manufacturing and textile and fashion consultancy companies were also able to validate the finding by providing information on how and why the changes that have occurred within retail and wholesale brand, and where the industry is going.

Finally, the overall process of interview with the key informants lasted from 30 to 60 minutes, and was conducted within companies' head office, whilst one was conducted on Skype due to company refurbishment. All the interviews were audio-recorded, and transcribed (King and Horrocks, 2010), once interviewing process finished (see appendix 1.2).

On completion of transcribing data, the researcher tried approaching the participants again to verify the interpretation (Klenke, 2008; Speziale et al., 2011), known as a member checking technique that approves the accuracy of a qualitative data (see section 5.9).

However, several challenges were encountered with this process, in a sense that some respondents did not respond back due to change in career and company, whilst some approved the accuracy. Consequently, member-checking procedure was dismissed for validating the research. Nevertheless, as mentioned earlier, the findings were already validated using person triangulation approach (Speziale et al., 2011), interviewing key informants with different level of experience (e.g. from assistant buyers to CEO) in the fashion industry, as well as the confirming the accuracy from textile and fashion consultancy companies.

The entire process from identifying the participant to conducting research was time-consuming and took approximately a year between March 2014 to 2015, until the data collection had researched saturation point. The saturation point validates the research in a sense, that all the data gathered was replicating the information that was found earlier by the key informants (Goodwin and Goodwin 1996), contributing to towards the literature of country of origin, retail marketing and branding. The next section will discuss the data analysis process and procedure that took place to conceptualize country of origin in the context of retail and wholesale brands.

5.11.7. Data Analysis Process

The next stage of this research study was to analyse data. Initially, the data was going to be analysed using software package NVivo, which allows the researcher to handle the creative messiness effectively, deleting or renaming the codes as required (Easterby-Smith et al., 2012; King and Horrocks, 2010). Nevertheless, Cassell and Symon (2004) have suggested that analysis software (e.g. NVivo), does not always allow the researcher to work efficiently with large amounts of text, which also makes the coding scheme complex and difficult, facilitating the depth and sophistication of the analysis. Thus, the use of NVivo was dismissed, and the data was analysed manually.

With reference to analysing data, as the study has identified that the differences between retail and wholesale brands have increasingly blurred (see chapter 7), content analysis, an approach which involves counting the frequency of the key phrases or words to identify the similarities, differences and observation was dismissed (Dwyer et al., 2012), and instead, inductive, thematic analyses technique was deemed as the most suitable approach (King

and Horrocks, 2010), with reference to drawing and understanding the ‘*meaning*’ of the phenomena.

The data analysis was done in three thematic approach stages; refer to table 5.5 in section 5.11.2, and these were: descriptive, interpretive coding, overarching coding procedure; systematically identifying the themes and patterns of meaning or meaning making process. For example, the first stage involved drawing out the broad themes or descriptive coding from the literature (King and Horrocks, 2010), such as understanding the meaning of country of origin (Miranda and Parkvithee, 2013; Yasin et al., 2007), perceived importance and use of country of origin constructs (Ha-Brookshire and Lee, 2010; Inch and McBride, 1998; Magnusson et al., 2011; Mostafa, 2015; Samiee et al., 2005; Usunier and Shaner, 2002), perceived issues relating to country of origin constructs (Dicken, 2015; Li et al., 2000; Magnusson et al., 2011) identifying the blurring of the difference of global sourcing (fashion manufacturing) within retail and wholesale brands (Dicken, 2015; McGoldrick, 2002), exclusive retail brand strategy (Anselmsson and Johansson, 2013; Davies, 1992; McColl and Moore, 2011; Salmon 2013), the evolution of retail brand and wholesale brands (Salmon, 2013).

Once the descriptive codes were gathered, the interpretive meaning of the codes were interpreted by referring back to the transcripts (King and Horrocks, 2010) and placing the information gathered from the interview under the suitable themes). The third stage was to illustrate the relationship or the shared categories, using inductive approach, and these have been presented in chapter 6 and 7 – analysis and discussion on COO in the context of retail and wholesale brands, illustrating the blurring differences between retail and wholesale brands, and in conclusion, presenting the impact country of origin on brand image, country image, retail image, product image, in the specific context where the differences between retail and wholesale brands have blurred.

In summary, section 5.11.7 discussed the data analysis process that was considered and utilised to conceptualise country of origin in the context of retail and wholesale brands. The next section indicates how the accuracy was approved and was transferable.

5.11.8. Reliability and Validity

With reference to approving the accuracy and credibility of the study, as mentioned earlier in section 5.9 and 5.11.6, a person triangulation approach, as suggested by Speziale et al (2011) was adopted, whereby, the data collected was approved not only by different level of participants, but also by industry experts from manufacturing companies, as well as textile and fashion consultancy companies. Furthermore, as mentioned in section 5.11.6, the interviews continued until the data gathered was replicating information was found earlier by the key informants of the fashion industry, often referred as a saturation point. Moreover, in terms of transferability (see table 5.6), although this was conducted in the context of the fashion industry, however, the blurring of retail and wholesale brands, and the impact of country of origin can be both transferrable to other product categories and marketing activities online and offline, contributing to the literature of retailing, marketing and branding.

5.12. Chapter Summary

This chapter was divided into two parts. The first part of this chapter reviewed the research philosophies and methodology techniques that were available in the literature for conducting a research, such as, ontology, epistemology, research design and so forth. Once the first part had been addressed, the next stage was to demonstrate how the research was to be carried out, adopting philosophies and utilised suitable research methods to conduct the research. For instance, in this study, the research philosophy that was adopted were, subjective, exploratory research, using phenomenological approach. The purpose of using phenomenological approach, which is described as a philosophy of understanding the phenomena, interpreted through the lived experience in time of the situation action, was employed because it was found that the notion of country of origin is complex, constructed with several dimensions (e.g. COD, COP, COB and COM), and that no research has conducted this research from industry perspectives, with specific reference to retail and wholesale brands. Consequently to carry out this research, the study adopted qualitative interview approach with the key informants of the fashion industry. The key informants were representatives of retailers and manufacturers of the fashion industry, and were chosen using judgement techniques. The purpose of choosing this sample were because, it was found that the differences between retail and wholesale brands have increasingly

blurred, and thus, it was difficult to split retailers into different categories. Consequently, the study looked the fashion industry as a whole, and therefore, incorporated manufacturers, and textile and fashion consultancy companies along with retailers. This was considered beneficial as the accuracy of the data was approved using person triangulation approach Speziale et al (2011).

In terms of analysing the data, this was done using, inductive, thematic analysis approach. The next chapter will provide the findings that were found, contributing to the literature of country of origin, retail marketing and branding, as well as re-examining the definition of retail brands, proposed by (Davies, 1992) and towards the structure of the fashion industry.

Chapter 6: Analysis and Discussion of Country of Origin Components and Constructs

6.1. Introduction

This chapter presents findings relating to the aim of the study, which is to examine the impact country of origin has on the UK fashion industry with specific reference to retail and wholesale brands, by eliciting the industry perception of country of origin via a series of key industry interviews incorporating retailer and manufacturer perspectives.

The purpose of examining industry perception is because the existing literature concerning country of origin concepts has mainly concentrated on matters associated with consumers and purchasing (e.g. Aiello et al., 2009; Acharya and Elliott, 2001; Magnusson et al., 2011; Mostafa, 2015; Sharma, 2011). Nonetheless, industry perspectives with regard to the complex notion of country of origin have been ignored in the existing literature, particularly within the setting of wholesale and retail brands, where the boundaries between the two have become increasingly blurred (see examples of retail and wholesale brands in chapter 3). Thus, to accomplish the aim of the study, key informants were asked numerous questions regarding their understanding of country of origin, its importance and which other sub-construct was considered credible and used in their branding strategies. A full list of the questions can be found in table 5.10, section 5.11.6 in chapter 5.

To analyse the data, an inductive, thematic analysis approach was utilised, using three stages in the coding process, e.g. descriptive, interpretative and overarching coding (King and Horrocks, 2010) (see table 5.5 in section 5.11.2 in chapter 5). The data presented in this chapter has been organised into these following themes or initial higher codes: 1) Meaning of country of origin, associated with the place where the product is manufactured. 2) The significance of country of origin concerning strategic business plans, such as fast fashion sourcing, a tactic outlined previously in section 3.7.1 by Barnes and Lea-Greenwood (2006) that permits the brands to react quickly to market demand by offering fast turnover of fashion trends. 3) The importance and use of other country of origin components and constructs, including country brand origin, country of parts and country of

design. 4) The perceived issues relating to the general use of country of origin constructs and with specific reference to the UK.

The initial higher codes associated with the country of origin components and constructs were derived from the existing literature concerning the country of origin effect on consumers and their purchasing behaviour. For instance, authors (Insch and McBride, 2004; Ha-brookshire and Yoon, 2012; Miranda and Parkvithee, 2013; Pecotich and Rosenthal, 2001; Yasin et al., 2007;) provided a general definition of country of origin. Authors (Essoussi and Merunka, 2007; Hamzaoui and Merunka, 2006) proposed that country of design has no effect on achieving the standard of the product, and thus, does not affect brand image. Nonetheless, the results of this research assert that country of design is related to the image of the nation and thus mirrors the brand image. Ha-Brookshire (2012) asserts that the standard of the material (country of parts) is reliant on stereotypical views as well as cultural principles. In comparison, these empirical outcomes propose that country of parts comprises the most economical element in international sourcing and is additionally regarded as the key factor to achieving the standard of the product. Furthermore, authors (Magnusson et al., 2011; Samiee et al., 2005; Thakor and Kohli, 1996) looked at country of brand origin and its impact on consumers (see chapter 1, section 1.2 and chapter 2). However, the study has found that country of brand as a brand tactic is an essential subject to the mission, vision and values of the brand, and thus the applications of brand origin differ in varying fashion brands. How the interviews and themes were developed from the literature review can be found in detail in chapter 4 and 5, section 5.10.6 and appendix 1.

The next section will firstly address the meaning of country of origin with reference to the legal definition and requirements in the UK and other countries, as interpreted by the UK fashion industry.

6.2. The Meaning and Importance of Country of Origin

One of the main aspects of this research was to understand what country of origin means to the UK fashion industry. In response, a general definition of country of origin is provided along with the labelling legislation in the UK fashion industry and in other countries as well as the reason why a product is labelled in the UK; these are discussed below.

6.2.1. Definition of Country of Origin

Similar to the existing literature (e.g. Ahmed and D'Astous, 2003; Bilkey and Nes, 1982; Chao, 1993; Han and Terpstra, 1988; Tse and Lee, 1993) outlined in chapter 2, section 2.3.1, the results indicate a degree of agreement from all respondents regarding the definition of country of origin, articulating it, somewhat legalistically, in terms of place of *manufacture*. For example: “It has a legal definition, which is about the place where the majority of manufacturing takes place in a process” (Head of Department, Company B) or, more succinctly, “...where it is made” (Buyer A, Company A) and “...where it is manufactured” (Senior Designer; Company C).

6.2.2. Labelling Legislation in the UK

All respondents indicated that, with reference to UK legislation, labelling a product with country of manufacturing is not necessarily required for fashion clothing products. This has previously been established in the literature, as seen in chapter 2, section 2.2, by Gov.co.uk (2015) and Morello (1984). However, the findings indicate that labelling ‘Made in [...]’ does gain importance in the UK when brands are extensively promoting their origin (e.g. placing the Union Jack on the product assortment or associating a brand name with the brand’s origin). This is to ensure that brands are not providing misleading information to the customers. This is notable because misrepresentation or providing false details, such as where the product is manufactured, is illegal according to UK law. For example:

“[...] if a brand name is known as [...] London or [...] India, and I was manufacturing outside the UK, then it would be misleading if we didn’t label where the product is actually manufactured” (International Director, Company Q).

“[...] labelling is not a legal requirement for fashion clothing products, but if a company wishes to display, then they must provide the correct detail, as it is illegal to misrepresent the country of manufacturing” (Head of Department, Company B).

6.2.3. Labelling Legislation in Other Countries

A senior respondent from Company Q, a representative of a textile and fashion consultancy company that are known for providing funding and support to manufacturers, suggested that the labelling legislation related to origin is where the substantial transformation takes place and this may vary from one country to another. This was explained further with reference to different labelling requirements and legislation, particularly regarding differences between the UK and the US in a sense that in the UK, country of origin is legally associated with where the product is manufactured. However, in the US, country of origin is where the fabric originated, which as a consequence can result in issues when trading products with the UK and other specific countries. For example:

“So, depending on where you are, the rules are different, which goes back to the origin as opposed to where it is made, and the origin is very much where the fabric is from. So, if you bought fabric from China, shipped and constructed in the UK, then the origin is where you manufactured the product, but then if you shipped it to the US, then the origin is China. However, in the UK and in most of Europe, country of origin is the place where the product is manufactured” (International Director, Company Q).

6.2.4. Labelling Impact

Previous studies on country of origin have established how consumers use country of origin as an informative cue in their purchasing decisions to evaluate the quality of the product, especially if consumers are not familiar with the brand or if it has recently entered the market (Bilkey and Nes, 1982; Schooler, 1965). In comparison, although retailers believe that many consumers have accepted that the product is manufactured overseas, labelling a product is still deemed important for most organisations because it provides customers with the ability to make informed purchasing decisions. For example:

“[...] labelling is appropriate for us, because it gives our customers a choice of whether (or not) they wish to buy the product. So basically, our customers don't care if the product is made in China, but if they wish to make [an assessment of] the quality of the product based on where the product is made, we give them the choice to do that” (Head of Department, Company B).

6.2.5. Perceived Importance on the Choice of Country of Origin

With reference to country of origin, industry experts were also asked how important country of origin was to their company. In response, it was found that country of origin is considered important where the brand needs it, i.e. in the US (see also section 6.2.3). In other words, different countries can have different COO legal requirements, and thus the importance and perception of country of origin can vary in different countries. However, other impact factors also emerged from the findings regarding the choice of offshoring to different countries and home and proximity production, such as product quality, labour cost, media influence, lead time, transportation cost, and the impact of climate as well as different culture and language impact factors; these are addressed below.

Offshoring production (manufacturing apparel products overseas) is perceived by the industry experts of the UK fashion industry to be of importance for the purpose of attaining competitive advantages such as country expertise, quality and labour cost (see Perry et al., 2016); these are discussed below. However, this section also presents other impacting

factors, such as media influence on the choice of country of manufacturing and the choice of different country of origin by different organisations.

Furthermore, chapter 2 established that consumers use country of origin as a cue to evaluate the quality of the product (e.g. Li et al., 2012; Pecotich and Rosenthal, 2001). Similarly, all respondents perceived country of origin to be important with reference to product quality, and thus showed preferences towards overseas manufacturing, as Europe is mainly only deemed to have the facilities for basic products:

“I would say country of manufacturing is what I associate with when thinking about whether the quality of the garment is good or not. This is because in this old company I use to work for which was [...], we used to produce things out at Leicester, which was stretch garments, like cheap garments basically, and we used to say ‘Oh, Made in UK’. But I knew that they wouldn’t be the best quality because the price wasn’t high enough to, you know” (Junior Designer, Company C)

Additionally, as shown previously in chapter 3, section 3.8, in the literature on wholesale brands, Dicken (2015) and Perry et al. (2013) denoted how wholesale brands moved their garment production facilities overseas in order to attain low labour cost advantages due to the labour-intensive nature of the work. Similarly, a senior respondent from Company G, a representative of a lifestyle brand with a rich British history, reiterated the importance of country of manufacturing with reference to labour cost, skills, space and availability overseas. For instance:

“[...] the labour cost is still a massively important part of the total production cost, and there are still some fundamental capacity and capabilities (e.g. machinery, space and skills) required for the assembling the garments, which is relatively cheap in China, Vietnam, and other overseas countries, because of their wages” (CEO, Company G).

Furthermore, as outlined in chapter 2, which examined the literature on country of origin, authors (e.g. Lin and Chen, 2006; Nagashima, 1970; Passow et al., 2005; Sharma, 2011), have previously addressed the impact country image has on consumer perception, that can also be associated with the event or brand products. This agreement was evident from a manufacturing respondent of Company O, who suggested that for particular premium brands it is mandatory to manufacture only in certain countries. This is due to the input media has in creating a stereotypical and negative perception in the minds of consumers, especially with reference to some Asia-Pacific countries. For example, the Jigsaw case study in section 3.7.2 illustrates how it sources its products from China and Romania and manufactures mainly in China. As a result, the study found that it is necessary for some premium brands to only manufacture in certain countries in order to maintain the brand image. For example:

“There are certain brands that only use the like of certain country, to manufacture the products, but that is mainly to do with the fact that the factories in those countries are audited, rather than the other factories, but there are also concerns with where the garment is manufactured, especially since there has been a lot of press about certain areas in the world. Therefore, our brands associate with countries that do not have the same bad press as some others in the world. The country of origin is, therefore, important for brands that have a higher customer profile” (Senior Fabric Technologist, Company O).

Another retail respondent from the buying department of Company A, which uses both retail and wholesale branding strategies (see table 5.9 in chapter 5 and appendix 2) and which is well known on the high street for its style and affordable fashion, suggested that customers are currently aware of the ethical issues and social corporate responsibility involved. As a result, maintaining an effective relationship with the country of manufacture is identified as an important impact factor ensuring that the product is ethically sourced and manufactured according to the brand’s standard. Jigsaw can again be seen as example of a retailer which emphasizes ethical sourcing and social corporate responsibility (refer to case study 3 in chapter 3). The relevance of this is particularly in terms of developing and

maintaining a brand image, especially with the influence that the media has on consumers. For example:

“Country of origin is very important, especially because customers today are aware of where the garments are made, and if the garments are made in a country that is deemed as a third world country or doesn't have the correct structure in place, working ethics, such as long working hours, wages, and safety standards, then that puts people off” (Buyer B, Company A).

This section presented the findings regarding how industry perceives country of origin with reference to overseas production. The next section will provide findings and discussions regarding the importance of country of origin associated with home proximity and home production.

6.2.6. Country of Origin Associated with Home Production and Proximity

This section presents the findings regarding the importance of country of origin associated with home production and proximity, linking this with a strategic business plan such as providing quick delivery (fast fashion service) by reducing the lead time, a quick turnover and also saving transportation costs. Furthermore, other impact factors, such as different climate, cultural and language, were also mentioned with reference to the consideration of re-shoring; these are addressed below in this section.

With reference to the impact factors on the choice of country of origin, there was evidence of agreement among all respondents regarding the association with home country (or European) production or proximity, suggesting that country of origin is considered important for retailers who are looking to reduce lead time in order to respond to changing fashion trends. This makes it appealing to the wider market, but also facilitates the development of a unique brand image by providing something different. The implications of these findings are particularly associated with and refer to retailers, such as Dorothy Perkins, that are currently involved in manufacturing products in a range of countries,

including Turkey, India, China and the US, but which are looking to re-shore to the UK to decrease the lead time (refer to case study in section 3.7.2.). According to Tokatli and Kizilgun (2009), manufacturing in Turkey means providing fast fashion (see also Barnes and Lea-Greenwood, 2006), which allows buyers to demand shorter lead-time and higher flexibility from suppliers.

“[...] the ‘Made in...’ label heavily influences the business in terms of providing delivery, especially since we have home production, which means we can work real close, and having things made and in the store within store weeks” (Wholesale Coordinator, Company A).

Furthermore, a retail respondent from Company A (see table 5.9 in chapter 5 and appendix 2), which is well known on the high street for its style and affordable fashion, suggested that along with the benefits of quick delivery and shorter lead time, retailers have the opportunity to not only provide fast trend turnover, but can also save on transportation cost as well as order less bulk stock, thus reducing inventories. The advantages listed in these findings are consistent with manufacturing in Turkey; as Tokatli and Kizilgun (2009) have pointed out, not only is manufacturing in Turkey beneficial for providing fast fashion that reduces lead time, Turkey is also well known for procuring fabric at low policy cost and low shipping cost (because of its proximity to Europe). For example:

“[...] proximity also provides quick turnover, cost of transporting is nothing, and the stock comes in less bulk” (Buyer B, Company A).

In addition to this, retail respondents from the buying department of Company J (see table 5.9 in chapter 5), which refers to itself as a multi-channel retailer with a main focus on plus-size clothing, online and on catalogue, pointed out that country of origin in relation to manufacturing products in the home country (or proximate location) is also being considered because fashion brands occasionally encounter a change in climate as an issue, whereby the product has become mouldy during transit from Asia to Europe:

“[...] one of the many challenges in globalisation is the climate change. Because of the climate change, certain products mould or smell really bad by the time they reach the UK” (Senior Buyer, Company J).

Furthermore, retail respondents from the buying department of Company J (See table 5.9 in chapter 5 and appendix 2), which refers to itself as a multi-channel retailer with a main focus on plus-size clothing, online and on catalogue, but which is now bringing in a fast fashion strategy, pointed out that country of origin in relation to manufacturing products in the home country (or proximate location) is also being considered because the buying team often encounters language barriers and cultural differences when dealing with countries such as India and China. This issue is consistent with the findings from Chen et al. (2007), who showed how errors can be introduced in translation and that these need to be addressed in the early stages. In other words, the language barrier can be seen as a problem when retailers make factory visits and have to communicate with pattern and sample makers (see Chen et al., 2007). For example:

“We want to relocate our manufacturing system to nearby countries to prevent the language and cultural barriers we face when dealing with suppliers overseas. Even though we have our agents, who do speak English, there is still a struggle as not everyone can communicate in English or behaves in the same way” (Senior Buyer, Company J).

So far, section 6.2 has discussed the meaning and importance of country of origin with reference to overseas production and home and proximity production. With reference to home or proximity production, a range of advantages were identified, such as the impact on lead time and quick delivery, transportation cost and less bulk orders, the occasional impact of climate and the issues that cultural and language barriers can cause. The next section will specify how different organisations (retailers and manufacturers) perceive and use different countries for garment production.

6.2.7. Country of Origin Preferences by Different Organisations

Through the interviews conducted with the industry experts, preferences for different countries for sourcing and manufacturing were identified according to different types of retailers, depending on their strategic business plan, brand positioning and brand expertise. The choices for different countries by different retailers are mentioned below.

Firstly, all respondents indicated that in terms of overseas production, China has been the biggest garment producer, followed by Vietnam and Indonesia. For example:

“First is China, Vietnam, Indonesia, then there are other countries that have been looked at, but we haven’t moved there yet” (Creative Art Director, Company I).

However, a senior retail respondent from the buying department of Company J (see table 5.9 in chapter 5 and appendix 2), which refers to itself as a multi-channel retailer with a main focus on plus-size clothing, online and on catalogue, also pointed out that as the price of manufacturing in China is increasing, retailers are starting to explore and use other countries for garment production. For example:

“So, Indonesia can make similar type products as China. Historically they might have been seen as more expensive but the way China’s prices are going, that’s changing” (Head of Department, Company J).

The next section addresses other country preferences by different organisations, depending on the brand’s strategic business plan, the country reputation, the brand reputation and brand ownership.

6.2.7.1. Mass-Apparel Retail Brands

Retail respondents (e.g. companies A, J and K), representatives of affordable fashion, and those with multi-channel retail backgrounds (see table 5.9 in chapter 5) suggested that preferences for country of manufacturing in terms of providing fast fashion service and quality are Turkey and Portugal. For example:

“[...] we work in partners with different countries, primarily Turkey. The process involves giving them the designs, showing them what fabric we like and they then buy the fabric and manufacture the garment for us” (Buyer 2, Company A).

“[...] so Turkey and Portugal become interesting players in providing fast fashion, because Portugal is very hungry at the moment, so Portugal has become a very important quality manufacturer for the market” (Senior Buyer, Company J).

6.2.7.2. Design Led Retail Brands

Previously in section 6.2.5, the findings indicated how media input pushes some premium brands to use specific countries for garment production in order to maintain brand reputation and brand image. To be specific, a senior respondent from Company O, a representative of a manufacturing and supplying company catering to premium brands, suggested that premium, design-led brands often use countries that do not have a bad press, such as Romania, Sri Lanka and Macedonia (refer to Jigsaw case study for an example). Another key purpose of using these countries is that they provide quality products, but also that this helps in saving labour cost and allows premium fashion brands to maintain their reputation:

“We offshore garment production, mainly in Romania, Sri-Lanka and Macedonia, because of lower labour and premises cost, but also because there has been a lot of press about certain areas in the world, so we manufacturer somewhere that doesn't have the same bad press, which then benefits companies' reputations” (Senior Fabric Technologist, Company O).

6.2.7.3. Wholesale Brands

However, a retail respondent from Company G, a representative of a lifestyle brand with a rich British history, has suggested that Poland is also used for garment production, although Poland is considered relatively expensive compared to other manufacturing countries. Nonetheless, this particular wholesale brand company is able to manufacture some branded products in Poland due to ownership of the manufacturing facilities (see also section 7.3 in chapter 7). For example:

“[...] we shifted from the UK in the early 2000, and manufacture some of our products in Poland, where we own the factory and facilities” (CEO, Company G).

6.2.8. Summary

The overall purpose of section 6.2 was to provide findings regarding industry experts' perception on the meaning of country of origin, which was linked to the definition, the legal labelling requirements, and the reason why country of origin is labelled on products, especially as it is not considered a legal requirement in the UK unless a brand is communicating a specific country in their brand message. The findings section then followed this by discussing perceived importance of country of origin with reference to offshoring and proximity. Whilst conducting the research, it was found that fashion retailers and organisations had different views regarding the preferences for country of manufacturing, depending on the brand's history and ownership, the strategic business plan (e.g. fast fashion and cost saving), and leadership in manufacturing.

However, this study has also found that other country of origin components and constructs are also perceived to be important and are communicated by the fashion industry, depending on the country or location, retailers, brand positioning, service provided and market demand; all these are addressed below.

6.3. Perceived Importance and Use of Specific Country of Origin Constructs

As noted above in section 6.2, respondents appeared to primarily associate the notion of COO in terms of country of manufacture, with a consideration of its importance with reference to fast fashion and unique selling point. However, the meaning, importance and use of other sub-constructs of COO in the context of manufacturing and branding aspects (e.g. country of design, country of parts and country of brand origin) were also mentioned, depending on retail and wholesale brand history, brand positioning, brand identity, quality promises, expertise, and long-term strategic business plans and these are addressed under each country of origin dimensions. Consequently, this chapter is broadly divided into the three above-mentioned sub-constructs. Each construct provides a definition, its implications or the issues that impact a brand when making a specific choice of a country, and the way country of origin constructs are communicated, depending on the type of construct and market demand.

6.3.1. Country of Design

The structure of this section firstly discusses findings regarding the meaning of country of origin and its implication in the context where the designing of a fashion product is mainly based in the UK. In terms of country of design, a series of motives impacting the choice of designing in the UK are mentioned, such as cultural knowledge, control of product design and its impact on the country and brand images; these are addressed in this order in this section.

Respondents were also asked how country of design is used as a branding tool. As a result, it was found that, apart from one specific single retail brand (Company B), the remaining retailers and manufacturers pointed out that country of design is not necessarily used as a branding tool, although it does impact the brand image. For instance:

“[...] well, we don't tend to pull out on where things are designed; it's not a major thing for us” (Head of Department, Company B).

“I think it attracts the customer’s attraction by saying that there is care gone into the design, I think its drawing the fact that we care about where our lingerie and other things are designed from” (Assistant Buyer, Company B).

However, as the remaining brands did not mention the use of country of design as a branding strategy, the main focus of this section is on the meaning, the process and its implication on the manufacturing aspect, and the impact it has on brand image. The next section will provide a generic definition of country of design and the process in the context of the UK.

6.3.1.1. Definition of Country of Design

According to all respondents, the understanding of ‘country of design’ is consistent with the literature outlined in chapter 2, section 2.3.2 (Essoussi and Merunka, 2007; Inch and McBride, 1998; Li et al., 2000). This involves associating the country of design with style, shape, silhouettes and creative prints such as prints, patterns and logos:

“[...] style, shape and silhouette of the garment to the country where the product is designed, and where the creative prints, patterns, logos and other technical variables are developed” (Marketing Director, Company H).

6.3.1.2. Process of Country of Design in the UK

The role and the process of designing in-house were explained in greater detail by a senior retail respondent from Company C, which initially started in the business as a small menswear brand, but which is now targeting a wider market and is well known for its product performances designed for multiple purposes. They suggested that the design team is split into several groups, each allocated with different tasks, such as researching the colour or silhouettes, and then the ideas are combined and presented to the other members of the supply chain team to confirm whether the idea and style are appropriate for the market demand. This process of UK fashion brand designing in-house goes in hand with

the process explained in the case study of Jigsaw (see case study 3 in section 3.7.2) and the process explained in the case study of the UK fashion industry by Khan et al. (2012). Their illustrative case study indicated how the designers of a fashion company create fashion items that optimise the balance between the key components of the business concept, which includes fashion, best price and quality; to do this, they carry out research, draw inspiration from trade fairs, exhibitions and similar events. For example:

“We split the design team into several groups, with some designers doing the detail on the research that is felt right for the season, while others do research on the colour and the overall silhouette. The design team then gets together; discusses the idea with garment technology, which then look into this, to make sure that the labels are in the right place, and also help with a pattern and silhouette cutting, if the designers are unsure” (Senior Designer, Company C).

Furthermore, another retail respondent from the design department of Company C, which focuses on product performance designed for multiple purposes, stated that country of origin has a legal meaning, namely where the product is manufactured; however, from a branding aspect, country of origin is associated with where the brand and the product are actually designed. These findings, related to the perception of brand origin allied to country of design, have increasingly been noticed by industry expert representatives of design-led retailers and brands that focus on performance and those that focus on style, such as Jigsaw (see case study 3 of Jigsaw). These findings thus illustrate that the brands are of British origin, as most British retailers design their products in-house. For example:

“[...] for an actual garment I would assume it's where it is manufactured, for a stand-alone garment. But if you were talking about a brand, I would say country of origin is where it is designed, basically” (Junior Designer, Company C).

This section indicated the definition of country of design from industry perspectives, followed by the process involved, and how country of design is perceived and associated with country of origin. The next section will discuss the importance of country of design with specific reference to the UK.

6.3.1.3. Importance of Country of Design in the UK

This section discusses the findings concerning industry perceptions on the importance of designing the product in the UK, such as control of the product design as well as cultural knowledge and understanding.

According to all retail respondents, country of design is described as an important aspect of the fashion industry because brands have the opportunity to work closely with their head offices, which are primarily based in the UK in the cases of most fashion retail and wholesale brands. This corresponds to a study by Au et al. (2000), which explained that a successful designer must be in constant touch with time and understand the market for which they design, while considering its interests, attitudes, value for dress and so on. Consequently, a senior retail respondent from the design department of Company C, which is well known for its product performances designed for multiple purposes, contributed that creating product designs in the UK enables the designer to create appropriate styles and fashions that are demanded by the market. This goes in hand with the case study of Jigsaw (refer to case study 3), which illustrated that the advantage of designing the product in-house in the UK is that it is possible to take inspiration from nearby surroundings, such as the market and the V&A art gallery, and adapt it quickly into a design idea for eager customers (see also Jigsaw-online.com/blog, 2014). Furthermore, McRobbie (2003) also points out that designers in the UK can produce short-run styled products in response to an unexpected spurt in market demand. Furthermore, working closely also provides industry experts with the opportunity to have control over the functional and aesthetic elements of the product. Likewise, the respondent explained that working closely also enables the designer to manipulate the product style and add features as needed. For example:

“As an in-house design team, there are several responsibilities such as doing research on the season, on the detail that is considered important, colour, silhouettes and etc., and putting together those ideas as a mood board. The ideas are then presented to the agents in Germany and Canada. As both countries’ climate and consumers are different, we then have to find a design solution to ensure that it meets the agent’s feedback. So, working in-house gives us the control to take in that feedback and change the design immediately, as per needs” (Senior Designer, Company C).

Another retail respondent from the design department of Company C (see table 5.9 in chapter 5), which is well known for its product performances that are designed for multiple purposes, provided preferable views with regards to products designed in the western part of the world as opposed to eastern countries. One of the key reasons for preferences for a western country of design is the lack of knowledge and understanding that eastern countries tend to have with regards to western fashion trends, which again can be due to cultural differences in different parts of the world. For example:

“[...]to be honest, I would prefer products designed in the western part of the world, especially in the UK, Europe, North America, because that is the style we have in Europe. In my previous job, we used to go to the Chinese market hall in China, and buy ready-made garments to sell, basically. Their factories then design and produce the garment without actually having any knowledge and understanding about our fashion style, which then results in different fashion from what is worn here in Britain” (Junior Designer, Company C).

The section above presented findings concerning the motives and preferences for retail and wholesale brands regarding the design of products in the UK. The next section discusses the findings regarding the association with country of origin and its impact on brand image and country image.

6.3.1.4. Country of Design Impact on Country Image and Brand Image

This section discusses findings regarding country of design associated with country image, brand image and brand identity, which includes a range of factors such as association with quality, performance, brand heritage, technical aspects and customers' expectations; these will be addressed below.

All senior respondents, which included those at the chief executive officer, president and marketing director levels (see table 5.9 in chapter 5), pointed out that British design is associated with a high level of performance, quality and royalty and that, therefore, design

and technical skills commonly take place in the UK, reflecting the needs and demands of the market. For example:

“We use the performance on the [...] side; Britishness means performance and quality, even if its quality of culture” (CEO, Company G).

“I would say it’s very important that you really need to understand your customers. To understand the customers, you need to be really close” (Creative Art Director, Company I).

In the literature on country of origin, Adina (2015) and Chao (1998) established that design quality evaluates the process involved in getting from the conceptual idea to the engineering stage. Thus, country of design offers information regarding the quality of the product. In addition, interviews with all the respondents suggested that country of design impacts the brand image, which often has associations with country image and that, therefore, the design process needs to be conducted in the UK in order to meet customer demand and also to reflect the brand value and identity and maintain the brand image. For example:

“Design is something that defines your brand image, so getting the product designed in the same country is essential to maintain that brand image. For example, you are the UK-based company, and have a brand image of English heritage, and you are placing your design office in India, basically having Indian designers working on it, but they probably don’t even have a clue what it’s all about” (Technical Manager, Company N).

“[...] For example, if we were designing for Japan, we really need to be in the heart and mind of the consumers. So, Japan would help us design, but we would still design it here. Because we need to make sure that the handwriting of (Company g) is still the same and that (Company g) is global and can work globally” (Creative Art Director, Company I).

Furthermore, a senior retail respondent from Company I (see table 5.9 in chapter 5), which is outdoor focused and operates wholesale and retail brand strategies, suggested that although country of design is associated with the brand and country images, when designing a product for another market (e.g. Germany), colour, style and trend must fit the international (i.e. other European countries') market demands, as they have different views, preferences and demands in comparison to the UK market. This finding agrees with that by Labrecque and Milne (2011) and Labrecque et al. (2013), as highlighted in chapter 3, section 3.4.2, on how the use of colour is an integral aspect of marketing and corporate communication, which aids in constructing a visual brand identity through the utilisation of associative colours that may appeal to the intended audience or market (see also Aslam, 2006). For example:

“[...] Germany does not like three colours on their products. So, if you have one colour on the body, a different colour on the lower body and a third on the zip, they get completely freaked out; whereas, in the UK, we don't really see it as a big deal” (Creative Art Director, Company I).

A senior respondent from Company M (see table 5.9 in chapter 5), which has a history in manufacturing and supplying threads and other components to premium brands (see table 5.9 in chapter 5) but is also a wholesale brand, perceives country of design as an important construct which is considered to reflect the brand's origin. This is because the technical input and knowledge, encompassing design, existing mills, technology and fabric development, are all based in the UK, and thus the company takes pride in promoting British technology on the information provided on their own website, reflecting the brand origin and the brand image:

“On the company website it says the technology is British. So, the technology (or the fabric development) is very much UK-based, which involves technical development” (Non-Executive Director, Company M).

However, another senior respondent from Company P, which provides consultancy and funding to fashion businesses and was interviewed for the purpose of validating the research (see chapter 5, section 5.11.8), provided the argument that although many retailers sell themselves as British retailers, this has led to controversy between manufacturers and retailers, because manufacturers claim that the production is held overseas. Thus, apart from the design element, nothing else in the garment production is actually British. For example:

“A lot of the manufacturers are very upset about brands, retailer brands say, ‘thoroughly British’ when none of it has been made (other than the design) in Britain. Now, Britain does have fantastic designers in industry and that is important” (Textile Researcher, Company P).

Another factor that emerged from the interviews with reference to the importance of country of design was the impact of style and fabric on consumer perception and expectation:

“Well, the brand image is based on the collection. It’s based on the garment style and the fabric chosen for the garment” (Senior Fabric Technologist, Company O).

Furthermore, a senior respondent from Company Q, a representative of a textile and fashion consultancy company that is known for providing funding and support to manufacturers (see table 5.9 in chapter 5), pointed out that European customers have a naïve expectation, whereby customers believe that if something looks like it was made in Europe, then it possibly was made in the Europe, even though the industry is well informed that this is not the case, because although the product can be designed in Europe, in many cases, it is often manufactured overseas. Therefore, country of design plays an important part in developing a brand’s image in the UK and the rest of the Europe. For example:

“From a consumer’s perspective, country of origin has never been a major issue, until fairly recently, because country of origin varies from one country to another. In Europe, there has been a naïve expectation that something that looks like it’s

made in Europe is made in Europe, even though we all know that's not the case, and that is where the old world struggles in comparison to the new world” (International Director, Company, Q).

To summarise, section 6.3.1 presented findings concerning perceived meaning and the importance of country of design. Overall, the section indicated several factors concerning the benefit of designing the product in the UK, such as control of the design, meeting customer demand, and the fact that designing in the UK impacts the brand image, which also has a reflection on the country image. Nevertheless, the discussion regarding how country of design is communicated through visual or verbal representation was not addressed in this section. It is intended for the forthcoming sections because interviews with industry experts indicated that country of design is not used as a promotional tool as the market is aware that all the products are designed in the UK.

The next section will present findings and discussions concerning the relevance and implication of country of parts on the manufacturing and branding aspects of the fashion industry.

6.3.2. Country of Parts

This section presents the findings regarding the understanding of country of parts associated with the material used for garment production and how this is used as a branding tool, as it is linked to brand history and identity. With reference to sourcing material or manufactured fabric, a series of motives and issues impacting the choice of a specific country was identified, such as country expertise, cost of sourcing (including manufacturing and transportation) and quality concerns. Furthermore, from a branding perspective, a series of impacting factors have been identified, such as associations with brand history, associations with country image and reputation, and branding through customer service; these are addressed below in this order. Thus, this section discusses the definition and legality of country of parts in other countries as well as the impact of country of parts on the fashion business.

6.3.2.1. Definition of Country of Parts

All respondents indicated that any evaluation of the country from which a product originates (its origin) should be associated with where the material (e.g. yarn) is sourced. This is consistent with the finding by Ha-Brookshire (2012) of how consumers favour products based on where the material is sourced, such as US cotton:

“[...] in terms of where something originates from, I would say that it could be yarn origin. So for example, you could have Egyptian cotton made in China” (CEO, Company G).

However, a senior respondent from Company L, which was originally known as a thread manufacturer, but is now recognised as a component supplier for premium brands, pointed out the importance of associating country of parts with yarns, for example emphasising British wool or Harris Tweed, and that it is often very important for niche brands such as Prada and Barbour. Consequently, in general, country of parts is often associated with where the fabric is woven. Likewise, a senior respondent from a single retail brand also reiterated this. For example:

“Right, so if someone were saying this is made with British fabric, I would assume that it means that the fabric was woven in the UK. Now if it's a woollen thing, I don't know if it's a British sheep, I have no idea... But you know, some people would say its British wool from British sheep, but again that is pretty niche stuff, as we don't have enough sheep here” (President of Apparel and Footwear, Company L).

“But some of our products say Italian fabric, and that is where the fabric was manufactured or woven” (Head of Department, Company B).

In contrast, a senior retail respondent from the design department of Company C, which focuses on product performances designed for multiple purposes, discussed country of parts with reference to components such as buttons and zips and the concept's association with their own factory. For example:

“I mean we have our jeans made in turkey. But we control all our accessories made in China. The reason they are made in China and not Turkey is because we can have this control, so it can’t be counterfeited with a lot of factories making buttons and things” (Senior Designer, Company C).

6.3.2.2. Legality of Country of Parts in Other Countries

A senior respondent from Company Q, which provides consultancy and funding to fashion businesses (see table 5.9 in chapter 5), added that the relevance of country of origin with reference to parts differs from country to country and is very much dependent on the legal situation in the given country. This is specifically stated with reference to selling a product in Russia and the US, suggesting that country of origin in Russia and the US is associated with country of parts. Ftc.gov (2017), which focuses on protecting American’s consumers, confirms this with specific reference to wool product labelling, indicating, that a product label must reflect the ‘fibre content, country of origin, and either the name or registered identification number). However, information regarding manufacturing identity is considered equally important. For example:

“So, it varies from one country to another, but its more set out to the law of the countries; Russia for example, you will always know where it comes from – because Russians always put where something is made, etc. It’s a by – in terms of crossing a border with the merchandise, because when you are exporting, you have to declare where something is made and where the origin is from; you cannot sell without identifying its origin” (International Director, Company Q).

6.3.2.3. Country of Parts Impact on the Fashion Business Trading In Specific Countries

A senior respondent from Company Q, which is known for providing funding and consultancy support to fashion business (see table 5.9 in chapter 5), pointed out that, as the rules are different in the US and Europe, this can lead to complications with reference to selling a product on the US market. This is explained in the context that some companies buy the fabric from trade shows, which results in issues such as identifying the origin of

the parts (or material), which can make it legally difficult to sell on the US market due to their trading laws. For example:

“Some of our companies, they think about the origin when they have to export, because they bought something but they don’t really know the origin of the garment, because they don’t know where the fabric came from, they just went to the trade show and bought the fabric. So, that becomes quite complicated, and then if you are selling it in US” (International Director, Company Q).

6.3.2.4. Importance of Country of Parts with Reference to Sourcing and Manufacturing

This section presents findings concerning the impact factors that the industry considers important when making a choice regarding the sourcing of fabric, material, and components from other countries, such as cost of material, country expertise and quality.

One of the key impact factors regarding the choice of sourcing material was the cost of material. All respondents were in agreement in reference to the importance of the material used in the product, with the suggestion that this is due to the actual cost of the material, which is described as the biggest proportion of cost in garment production. For example:

“[...] with 60% of the cost in the material, and 40% of the cost is then the manufacturing of the actual clothing” (Technical Manager, Company N).

“[...] but for a piece of product or top that speaks to be £900, that is making a point, because the labour rate is high and the cost of material is high, although the material cost takes a biggest portion in the industry” (CEO, Company G).

Additionally, a respondent with a more technical background from Company N, which was initially known as a manufacturer but is now a supplier of jersey wear, suggested that when making decisions on where to source the material from, the cost of material is compared among different countries before the final sourcing decision is made. For example:

“If it is cotton it will come from Pakistan; if it’s polyester, it’s China. So, when they are getting priced up for a product, they do the cross-costing, which means that the costing is done from Pakistan, China, India and Bangladesh, from their suppliers, and if the garment is made in China, and the polyester is made in China, then of course the cost of the product will also come cheap” (Technical Manager, Company N).

Furthermore, along with the cost, another important factor impacting on the choice of country from which parts (fabric and other materials) are sourced is dependent upon the quality and expertise of the country, whereby India is known for embroidery and China is known for knitwear and cotton. For example:

“So, we source from various countries based on their expertise, price, qualities; for example on woven fabric, if we wanted some heavily embroidered products, then that is sourced from India, and for knitwear, that comes from China, just because that's where the yarns are sourced from” (Buyer, Company D).

So far, section 6.3.2 has presented the findings and discussions on the meaning of and factors impacting on the choice of sourcing material from a specific country. The next section illustrates how country of parts is used as a branding tool and has an association with brand history.

6.3.2.5. Country of Parts as a Branding Tool

In this section, different views have been presented regarding how retail and wholesale communicate country of parts through visual and verbal representations such as labelling or customer service, or have a connotation with the brand’s history.

Industry experts were asked about the use and importance of country of parts in their branding strategies. Similar to Musto’s history of being the first to bring fleece to the UK and using it to manufacture performance lead products in the UK (See case study 2 under

3.8.1), it emerged from interviews with representatives of lifestyle brands that have a rich British history that country of parts is one of the most important constructs in country of origin. This was a distinct factor because some wholesale brands are innovators of a specialist material, fibre or yarn:

“[...] we are known for the [material] used in the jacket, and thus, we continue manufacturing such jackets in the owned factory, in the UK” (Marketing Director, Company H).

Furthermore, it was found that some retailers (e.g. Company G) consider country of parts important because their use of specific materials or construction processes defines their brand’s heritage. This again goes in hand with the case study of Musto, as it is known for being the first to bring fleece in the UK fashion market (see case study 2 under section 3.8.1). For instance:

“[...] is where the skillset for taping seams was based, involved in raincoat manufacturing” (CEO, Company G).

[...] we pioneered the use of [...] components’, which is stitched in [...], laminated in Scotland, thus, is EU origin” (CEO, Company G).

Moreover, according to the retail representative of Company A (see table 5.9, chapter 5), which is known on the high street for style and affordable fashion, suggested that country of parts is an important construct for fashion retailers because it is considered an effective communication tool, especially when associated with a recognized prestige country image. For example:

“The best quality leather is associated with Italian and Brazilian nations, and thus, is considered as a great selling point” (Buyer A, Company A).

Likewise, a senior respondent from a well-known British brand (Company B), which continues to operate a single retail brand strategy (refer to table 5.9, chapter 5), suggested that country of parts is an effective branding tool if it is appropriate for the product and adds value, such as in the case of niche retail branded products. Consequently, this is where retailers would use country of parts as a branding tool by labelling (British fabric) or by using a tagline that is associated with a specific location. For example:

“It’s important if it’s appropriate for the product we are selling. So, for example, in our British sub-collection we would pull out Harris Tweed through tagline or labels, because it’s appropriate” (Head of Department, Company B).

Furthermore, all retail representatives of Company A (see table 5.9, chapter 5), which is a retail and wholesale-oriented business focusing on style and affordable fashion, pointed out that the use of material associated with a reputable country image is communicated verbally through the store staff in their own retail brand store. For instance:

“The best quality leather is associated with the Italian and Brazilian nations, and thus, is considered as a great selling point because consumers immediately associate it with the quality, and therefore, this is often translated to our customers through the store staff” (Buyer A, Company A).

To sum up, this section presented findings regarding the meaning and importance of country of parts in the context of where the boundaries between retail and wholesale brands have blurred (see chapter 7, section 7.5), considering the impact factors such as cost, country expertise and quality with reference to the choice of source country. Section 6.3.2 also indicated how different retailers associate and use country of parts (materials) as a branding tool. The next section discusses the importance and use of country of brand origin associated with brand history, its value and mission, and how this is used as a branding tool to develop a brand image within a global market.

6.3.3. Country of Brand Origin (Branding)

In this section, the study presents findings on how the industry perceives country of brand origin to be important, which is associated with a brand's heritage history, and how different brands use country of brand origin (e.g. brand name, colour, national flag label) as a branding tool to maintain and develop the brand's identity and image, both nationally and internationally. This will be addressed below under each sub-heading.

6.3.3.1. Meaning of Country of Brand Origin

According to the existing literature, country of brand origin is described as a country with which consumers associate the brand, referring to the place where the brand was established or where the headquarters are located (Samiee et al., 2005; Paswan and Sharma, 2004; Thakor and Kohli, 1996). In comparison to this and according to all the respondents, country of brand origin is considered important for all types of retailers and manufacturers as it often incorporates an emotional association with a rich brand history, a brand's values and mission, and its principles. This goes in hand with the case study of Musto and PVH (see chapter 3, section 3.8.1) in the sense that Musto takes pride in being the leader in British outdoor active wear products, whilst PVH also takes pride in its brand origin, which is American in nature, by emphasising their heritage and brand portfolio on their website. For example:

“[...] so the brand is currently owned and run by the family members of the brand owner, carrying the family values and culture, which is behind everything our brand does. So, our entire British heritage is gated by vision, mission and company values.” (Marketing Director, Company H).

6.3.3.2. Country of Brand Origin as a Communication Tool and Its Importance

Along with the associations with brand value and equity, it appears that country of brand origin is considered important depending on the type of retailer, the brand's identity and its associations with the country image. Furthermore, it appears that country of origin is communicated through a range of visual representations, such as brand name, labelling of the national flag on the product and the use of colour; these are addressed below.

6.3.3.2.1. Brand Name

The retail respondents from representatives of lifestyle brands with a rich British history (e.g. companies G, H and K) and those with a multi-channel retail background and linked with rugby associations indicated how a common method to communicate country of brand origin is through the *brand name*. As outlined in chapter 3, section 3.4., authors (e.g. Colomb and Kalandidas, 2009; Kavaratzis and Ashworth, 2008; Medway and Warnaby 2014) emphasise how marketers use a range of brand name strategies to make a brand's identification distinctive, such as 'place marketing' and/or 'foreign branding', e.g. be Berlin, 100% Pure New Zealand and Aalborg–Seize the World. In the interview, the respondents added how brand name is often considered to have an association with the brand's history and national identity, implicating the brand's identity, brand image and country image:

“The brand name of the company is under my father's name, and the brand is inspired by the British [...] sports, and British means performance, so that is what we are designing our products for” (CEO, Company G).

“[...] the origin of the brand is important because the name of the brand represents the heritage, history associated with the name of the two directors, who are currently also the existing owners, of the company, and the brand has an association with a particular sport, because the two owners were the captain of the national team, and then after they started this company started naming after themselves” (Assistant Buyer, Company K).

On the other hand, it was found from the interviews with the retailers that retail brands often communicate the origin of the brand through the sub-brand collection, which allows the brand to attract those consumers who may have an emotional association with the brand's history. The concept of sub-branding has previously been addressed in chapter 3, section 3.5.3 (e.g. Jack and Shaw, 2009; Varley and Rafiq, 2001). For example:

“[...] you will probably see it [COO] more on the sub-brand collection, [...] named after the brand’s original name, and this is how the company started, which is still under the umbrella of the brand, and then the same goes for menswear, which is named after the location where the brand store was first established” (Buyer B, Company A).

6.3.3.2.2. Colour

Furthermore, it has been suggested that another way through which wholesale brands communicate their heritage history is by using specific colours on their visual identity, such as the logo and other marketing tools. For example:

“[...] but this can also be seen through colour we use on our brand name and overall brand theme, associating with the rich history drawn from the countryside and Scottish history” (Marketing Director, Company H).

Additionally, retail respondents, such as companies C, G, and H, who are representatives of lifestyle brands and those with product performance as a focus of the brand, operating both wholesale and retail brand strategies, have indicated that the use of colour on product merchandise can have a connotation with a location or a country, which consequently can be used to have a country associated with a brand or to move away from a specific country image. For example:

“[...] the use of green and tartan print that represents countryside and Scottish history” (Marketing Director, Company H)

“[...] we are going for a new clear aesthetic style, and moving away from the grey vintage wash, and other vintage elements, which includes anything grungy” (Junior Designer, Company C).

6.3.3.2.3. Labelling the National Identity

Along with brand name and colour, another way through which wholesale brands, especially those who are manufacturers, wholesale brands or retail brands (e.g. companies G and H), promote their heritage history is through the use of Union Jack labels to associate their brands with the national identity. For example:

“As a British brand, we use the Union Jack, because people can naturally form a connection with us being British” (Marketing Director, Company H).

However, it was reiterated by a senior retail respondent from Company H, a representative of a lifestyle brand with a rich British history, that labelling the Union Jack on products was important for a brand, as British identity and heritage is the driver of the brand and is associated with the brand’s identity. For example:

“[...] we use the Union Jack as well, because people see us as being British, so it's a natural connection, but some of the use of Union Jack is on specific [...] Steve [...] collection, who is an iconic American actor, and that is one of the drivers for our product range (Marketing Director, Company H).

Furthermore, another senior retail respondent from Company G, a representative of a lifestyle brand with a rich British history, suggested that they also communicate their British identity through the use of the Union Jack and a tagline. However, it has emerged that this is primarily the case when the product is sold overseas to specific countries, as a British identity is considered appealing in certain countries (e.g. Scandinavia) and markets. For example:

“As an original outdoor British brand, and as the official suppliers to [a particular outdoor national team], we proudly make use of the tag line/Union Jack label when selling products internationally, because ‘British’ sells as quality. However, we don’t particularly feel important communicating that in the UK, as the market here is already aware of our British heritage” (CEO, Company G).

6.3.3.2.4. Importance of Place Association

As shown in chapter 2, the literature on country of origin highlights how consumer perceptions on the overall country image can vary substantially (Shimp et al., 1993) in terms of connotations held in the memories of consumers, especially when the association with the image of a country is also preferred (for example, advanced technology and highly skilled labour in Germany, fashion and good taste in France, design in Italy and cheap production in China). Similarly, a senior respondent from Company I, which is a British outdoor brand with a foreign brand name, made the point that the value of the British identity associated with quality varies from country to country. As with the findings by Lee et al. (2013), the respondent reiterated that in specific Asian countries, such as Japan, British identity is considered to be indicative of good quality. However, another respondent from Company C, which is known for product performance, also pointed out that in some parts of the Europe (e.g. Germany), the British image has been associated with vintage, grunge and boring as Britain is considered to be less active in adventurous activities. Thus, the relevance of communicating country of brand origin varies according to the type of product, the country image and place associations. For example:

“[...] it depends on where you are standing in the world. So, if you are standing in Japan, I would call the brand British because they think British is a really good thing, but in some European [countries] British is still considered old fashioned and boring, for old people” (Creative Art Director, Company I).

Furthermore, it has emerged from all the interviews that, regardless of where the product is manufactured, the brands are still recognised as British, which is often associated with the brand’s heritage history, its identity and stereotypical perceptions of the country and the specific locations. Thus, country of brand origin is considered important for all types of retailers. For instance:

“[...] in some countries they see our brand as British brand, and that is part of the attraction, because they know England is so fast, British fashion is so fast” (Buyer A, Company A).

“People would look at the brand name and they would be thinking of (Company f) as British” (CEO, Company G).

However, a respondent from Company O, a representative of a manufacturing company that supplies to premium retail brands (see table 5.9 in chapter 5), pointed out that the British image is also associated with royalty, and thus companies that are supplying products to brands that have some sort of connection to the royal family take considerable pride in the association of their image to the national image, which consequently adds value to the brand’s image:

“[...] we supply manufactured products to [a premium brand] that are worn by Princess Kate Middleton, so this is why the British image is important to us” (Senior Fabric Technologist, Company O).

Similar to the case study 3 of Musto in chapter 3 that illustrates how they were awarded the royal warrant for being the leaders in active performance wear, respondent from Company H explained how they were also awarded with the royal warrant in the 80s for supplying waterproof clothing, and that the royal warrant particularly represents the Britishness of the Brand.

“And then on the top of that, we’ve got the royal warrants, which were from HM the Queen, Elizabeth II, the Duke of Edinburgh, and HRH Prince of Wales – strongly associating this with the Britishness” (Marketing Director, Company H).

6.3.4. Summary

Section 6.3.3 presented findings and discussions on the definition, importance and use of country of brand origin as a branding tool. However, in contrast to country of design (see section 6.3.1), the country of brand origin section did not present findings associated with manufacturing, because apart from one fashion brand (e.g. Company H), no other brand is actually involved in manufacturing in the UK, and thus country of origin has very little

association with country of manufacturing or country of parts, but rather is associated with country of design, as products are designed in the UK (see section 6.3). One of the key findings of this section was that country of brand origin has emotional associations with the brand's heritage history. However, in addition to the emotional associations, retailers use various visual representations to make an association with the brand's origin, such as brand name, colour and the labelling of the national identity with the Union Jack as well as the importance of place associations.

The next section will discuss the findings with reference to generic issues and issues relating to specific sub-constructs. The section will also highlight issues in the context of the UK.

6.4. Perceived Issues Relating to the Use of the COO Construct

The structure of this section presents findings concerning generic issues, such as transportation cost, labour cost and customer attitudes and preferences; but it also discusses the issues in the UK context, such as lack of expertise, skills and resources, in response to re-shoring garment production and branding strategies; each of these issues is addressed relating to the specific sub-construct. The next section discusses the issues relating to country of origin in a manufacturing context.

6.4.1. Country of Origin

This section presents findings concerning generic issues relating to country of origin, such as customer attitude and preferences.

6.4.1.1. Generic Issues Relating to Country of Origin

All retail respondents suggested that country of origin is not necessarily considered important within value-led brands, as consumers continue to purchase a product regardless of where it is made. A similar statement has been made by Magnusson et al. (2011) and was addressed in chapters 1 and 2. Furthermore, it was made very clear by respondents that consumers are aware of and have accepted that products are manufactured in the Far East,

and therefore country of manufacturing is only considered to be a concern when selling premium branded products:

“It’s not a legal requirement and, therefore, not sure if it’s displayed on the retail products because most of our customers are aware and have accepted that products are made in the Far East. Years and years ago, it was all very much about the UK manufacturing, but most people now know that fashion products come from China” (Assistant Buyer, Company K).

The literature on country of origin has previously suggested that consumers favour domestically manufactured brands and products, with a willingness to pay more (Sharma, 2011). In comparison, all respondents have suggested that country of manufacturing label only matters to a small percentage of customers in the UK. For example:

“So, there are some consumers that may look out for ‘Made in...’, but the majority don’t care, as most current consumers are concerned about the style and the price” (Technical Manager, Company N).

“[...] it depends, for instance [...] this jacket I am wearing, no one would really care where it is made, even it may be actually made in China, and the product label says it’s made in China, but that is how we like to position our brand, but the customers are still buying into it, in fact they do not care” (Head of Department, Company B).

Section 6.4.1.1 discussed the findings on generic issues relating to country of origin. The next section will present findings with specific reference to the UK.

6.4.1.2. Country of Origin Issues in the Context of the UK

This section presents findings concerning generic issues relating to country of origin, such as labour cost, high capital and machinery, skills, and the lack of an experienced market.

The theory put forward by Jeffrey and Evans (2011) suggested that there was a time when clothing manufacturing was widespread in the UK, with many types of garments being produced domestically. However, it has emerged from the interviews with the key informants of the fashion industry that this is no longer the case due to the higher labour cost, high capital cost, and the fact that the UK has little machinery or other resources. Nevertheless, as can be seen below, an issue that all respondents in the fashion industry perceive to be important with reference to country of manufacturing is the cost. Thus, all the respondents consider offshoring manufacturing important for the fashion business. For example:

“The assembly cost, the labour cost, and the labour content, is still a massively important part of the total production cost. And there is some fundamental automation around the assembling of the garment, but for most brands ‘Making in the UK’ is still too expensive” (CEO, Company G).

Furthermore, all respondents have argued that the lack of skills and resources is deemed to be one of the biggest factors working against production in the UK. As one respondent noted:

“The skills and resources required for manufacturing are not available in the UK factories, and therefore, we balance the requirement of maintaining the factory, and running an academy and apprenticeship to provide the support to the staff in the factory, and to ensure that the product is manufactured to the level of the standard. Since it is not practical to have everything made in the UK, most of our garment production takes place all around the globe” (Marketing Director, Company H).

Moreover, the results from all the respondents indicated that one of the key reasons for the UK not having enough skills and resources is because most apparel manufacturers are now in their late 60s and the younger market is neither trained nor willing to do the factory work. Therefore, industry experts believe that fashion products manufactured in the UK are not manufactured to the standards required. For example:

“[...] this is because most manufacturers are now in their late 60s, and the younger market is not trained for manufacturing high quality garments, which requires time, training and cost” (Senior Fabric Technologist, Company O).

Nevertheless, all respondents suggested that there is some hope for bringing manufacturing back to the UK. However, due to the lack of resources and skills, this could take up to 5 to 10 years, as it requires investing in training young people and other resources. Thus, the products currently made in the UK by both the value and high street brands may not be fully stitched in the UK or entirely meet British standards. For example:

“Now bringing manufacturing back to the UK would impact the price point of the product, as it really associates with the skills and the capacity, which previously we could not provide in the UK. So, one thing we have to do now is to bring production in-house. In other words, instead of buying in manufacturing fabrics, we may bring those skills, but we need to develop and train those skills and then bring the actual production” (Non-Executive Director, Company M).

Section 6.4.1 discussed the generic issues in the context of country of origin, to be specific with reference to country of manufacturing. The next section presents finding concerning issues relating to country of parts.

6.4.2. Country of Parts

This section discusses perceived issues with reference to country of parts, covering a range of generic issues such as cost of material and transportation cost, with specific reference to the UK fashion industry, whereby the notion of country of origin becomes complex and the change in climate has an impact on the material and product quality once the product is brought from certain countries back to the UK. The next section firstly discusses the generic issues.

6.4.2.1. Generic Issues in Relation to Country of Parts

This section addresses the generic issues in relation to country of parts; these are mainly associated with the cost of material and the transportation cost.

An agreement was evident among respondents that the (material) is considered one of the cost-intensive elements in the fashion industry (see also section 6.3.2). For instance:

“The main cost is on the material, so the actual fibres, especially if it is Kashmir, wool or Al-Haga, these are all really expensive fibres, and your money is in the fibres, unless you are using a basic fabric, in which case cost of manufacturing is higher” (Senior Fabric Technologist, Company O).

Furthermore, all respondents indicated that the cost of transportation is also considered an issue which impacts the choice of sourcing from a specific country. This is consistent with the study by Christopher et al. (2006) on logistics and supply chains, which highlighted the impact of distance on the transportation cost. According to the OFSN (2010) report, this has become even more of an issue following the rise in oil prices. For example:

“[...] with most of the production taking place in China, companies often tend to get the fabric and then assemble the product in the same country in order to save the shipping cost and the lead time” (Senior Designer, Company C).

“[...] because you will end up paying higher prices to get the raw material in the UK and then the sewing is another additional cost, which will naturally be higher because of the labour cost in the UK, even the minimum wage is higher than what you pay in China or India. So, when you calculate everything together, the cost of manufacturing and the cost of material is a lot cheaper in the Far East, in comparison to Europe” (Senior Fabric Technologist, Company O).

6.4.2.2. Country of Parts in the UK Context

This section addresses the findings in the UK context, with reference to how the use of different countries makes the notion of country of origin complex in the fashion business,

as well as the effects of the impact of climate on product quality; these are addressed below.

A retail respondent from the design department of Company C, which is well known for its product performance designed for multiple purposes, suggested that many fashion retailers source material from one country and then assemble the half-finished product in the home country, allowing them to label the products ‘Made in the UK’. However, the product is not necessarily fully stitched or knitted in the UK. For example:

“[...] I know companies that import Chinese fabric to the UK, so that they can produce within UK, to which I guess they would say to the customer that it’s a UK garment. But that fabric was unlikely to have been woven or knitted in the UK, and then I know that some companies import half-finished garments, and then say it’s produced in like Italy, even if all they may have done is sew a seam on. I know there is an aspect of that, which goes on it. But don’t think an average customer would know the differences (Junior Designer, Company C).

As mentioned in chapter 2, section 2.3.3, Tower et al. (2013) established that raw materials such as cashmere, cotton and other natural fibres are frequently sourced from remote and isolated locations such as China, Iraq and Pakistan, with China being the leading global cotton apparel exporter because of the skills and advanced technologies required (see also Ha-Brookshire, 2012). Similarly, with reference to country of parts, manufacturer respondents suggested that the key issue with not being able to obtain some of the materials from the UK or a nearby country is due to climate issues and other resources. In other words, certain materials such as cotton cannot be grown in the UK due to the weather and, therefore, the Far East is potentially the most significant place to source certain fabrics and materials. For example:

“[...] because of the climate, you cannot grow cotton in the UK, and therefore, it has to be mostly sourced from China. Therefore, for the fibres it’s the climate issue, and for the synthetics fabric it’s the product cost and technology” (Technical Manager, Company N).

The previous section discussed country of parts issues with reference to sourcing and manufacturing, covering generic issues and in the context of the UK fashion industry. The next section will address the issues with reference to branding country of brand origin, discussing the generic issues and in the UK context.

6.4.3. Country of Brand Origin

This section presents the findings regarding the issues regarding the use of brand origin. These are discussed, again, generically and in the context of the UK. Some of the key factors identified with reference to generic issues are consumer perception and attitudes towards country of brand origin. In the UK context, it's about detaching the British image through the use of colour and other visual representations in order to make it appealing to a specific international market; this is addressed below.

6.4.3.1. Generic Issues with Reference to Country of Brand Origin

One of the key generic issues identified with reference to country of brand origin is its importance depending on consumer preferences and attitudes. It is evident from all the retail interviews that the origin of the brand is only important for a brand if consumers show an interest. In other words, its relevance is dependent on consumer knowledge, interest and brand positioning. For example:

“[...] most people don't know, and don't care, unless it has a particular brand positioning. So, in theory, origin of the brand is not considered important for most brands, and therefore is not promoted, especially if consumers are not showing interest” (President of Apparel and Footwear, Company L).

“[...] customers' awareness of the origin of the brand is dependent upon their interest and what they buy into. For example, a female shopper that is into buying handbags and fashion products would not necessarily know the origin of a sports brand, because that would not be her interest, but would know the origin of the handbag brand she frequently purchases” (CEO, Company G).

6.4.4.2. Country of Brand Origin Issues in the UK Fashion Industry Context

This section discusses the findings with reference to brands detaching from the British image through the use of different visual representation such as colour and prints or through an association with the national identity in order to make it appealing to the international market; these will be addressed below.

Respondents from the design department of Company C, which is well known for its product performance designed for multiple purposes, mentioned the use of visual representation, such as replacing the traditional use of grey and vintage colours associated with the UK, to detach from traditional British appeal, with the aim of providing more contemporary aesthetics for a boarder market. For example:

“[...] we are going for a new clear aesthetic style and moving away from the grey vintage wash, and other vintage elements, which includes anything grungy, so we are still keeping the British heritage image, but not in a classical sense anymore” (Senior Designer, Company C).

Furthermore, retail respondents from Company A, which is well known on the British high street for its style and affordable fashion, suggested that they are also looking to detach from the British image to fit the needs and expectations of the international markets and that, therefore, country of brand origin is not used as a branding tool. This is mainly because the company wants to expand and expose the brand internationally by wholesaling with other foreign retailers. For example:

“[...] not emphasizing too much on the British association, because the brand is trying to expand within the international market, and doesn't want to provide the image that the brand is only available within and for the UK” (Buyer B, Company A).

In other words, it has emerged that the heritage association is not deemed as strong as it used to be, especially as other countries have bought some of these fashion brands and, therefore, the targeted market for such brands has also changed over time. For example:

“The UK market is not one of our biggest markets, but Germany and Canada are, and therefore, we don't consider the brand origin to be of importance” (Junior Designer, Company C).

6.5. Chapter Summary

The general outcomes from this section illustrate that there is a legislative significance for country of origin and considerable significance for the intention of operating as an informative signal for the customers, also when retailers are providing a fast fashion facility. However, for the fashion industry, the significance of country of origin is reliant on the values and mission of the brands. For example, a brand that is providing an outdoor waterproof jacket will possibly view country of origin (materials) as an essential aspect. This is due to the fact that the material utilized in the manufacturing is often indicative of the assured standard.

Similarly, brands that focus more on aesthetic characteristics, standards and performance would be more concerned with country of design. Ultimately, brands that do not have the same historical significance as wholesale brands or which do not offer a fast fashion facility will be additionally interested in country brand of origin as well as in-house planning, which once more would mirror the national perspective like the proficiencies, standards and style. The next section will provide the analysis and discussion regarding wholesale and retail brands, addressing the differences and the blurring of wholesale brands and retail brands with reference to country of origin, contributing new insights to the literature on retail marketing and branding and the structure of the fashion industry.

Chapter 7: Analysis and Discussion of Retail and Wholesale Brands

7.1. Introduction

This section presents findings that are examining the definition of retail and wholesale brands with specific reference to the UK fashion industry, particularly in the context where the differences are blurring. This emerged as a major theme during the interpretative process of data analysis, and is important because the blurring has a lot of implications for the perception of country of origin, and what country of origin concepts (e.g. country of parts, design, and brand origin) are used or perceived to be important by the respondents.

The findings of this study have been analysed using a thematic approach (King and Horrocks, 2010), and the research findings are organised as follows: 1) the definition of retail brands, 2) definition of wholesale brands, 3) the blurring of wholesale and retail brands and 4) the strategic and operation implications, with country of origin in the context.

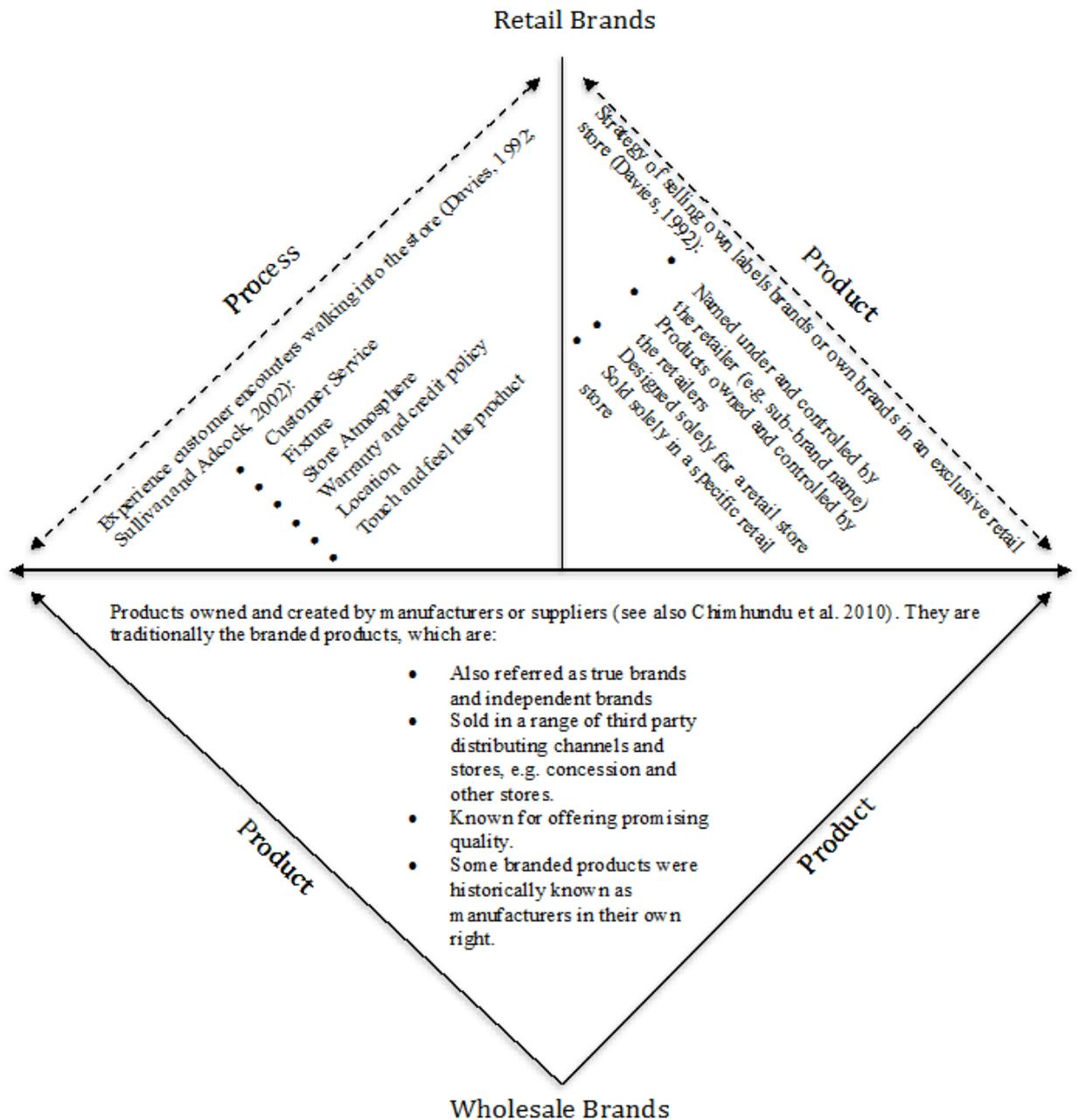
The purpose of examining the definition of retail brands is because, as proposed by Davies (1992), retail branding had previously been described as a strategy of selling a product and also as a process (see figure 7.1 below); named, owned, controlled, designed and solely sold in an exclusive retail store (e.g. McColl and Moore, 2011; Mitchell et al., 2012; Moore, 1995). On the other hand, wholesale brands were described as branded products, owned and created with a unique label by manufacturers or suppliers, carrying a strong brand name and promising quality, distributed in a range of third party channels and stores e.g. department stores and etc. (Chimhundu et al., 2010; Keiser and Garner, 2012; Salmon, 2013). However, no research to date has addressed how the differences between retail and wholesale have blurred, particularly considering country of origin impact with specific reference to UK fashion industry. The findings of this study provides evidence that retailers that could traditionally be categorized as retail brands (e.g. River Island, Topshop) have characteristics as closely aligned with the classification for wholesale brands; for example, because they are now selling their own label brands not only in an own retail

store or multi-channels, but also within third party pure-play channels (e.g. ASOS) and concession within department stores (e.g. Selfridges and Debenhams). It is found in this study that the purpose of this expansion is that it allows retailers to expose the brand internationally, developing global recognition and improves the brand image, which as a consequence increases customer's loyalty. Likewise, the study has found that wholesale brands are also becoming more retail oriented business, for the purpose of superior profit margin and control on the product merchandise.

Furthermore, the findings also highlight how the notion of retail and wholesale branding has become even more complex, as some retailers are now also manufacturers in their own rights, with integrated supply chain operations, in order to have control over the product design, quality, services, and to provide fast fashion, and how design-led brands are now fitting in the category of design and marketing oriented retailers, as well as in the category of wholesale brands. In fact, some design led-brands/retailers are even manufacturers in their own rights, with integrated supply chain strategy, in European countries. Finally, it has emerged from the findings, that some manufacturers are also retailers, particularly wholesale oriented brands. However, the blurring of retail and wholesale brands in an under-reached area, and the strategic and operational implications these changes are having on the fashion business, with its association with country of origin.

The next section presents the interpretation of data emerging from the findings on the definition of retail and wholesale branding, which consists of, terminologies currently used in the fashion industry for both retail brands (e.g. high street brands) and wholesale brands (e.g. true brands or independent brands), how using retail brand strategy allows retailers/brands to have control over merchandising, profit and customer satisfaction, and the impact selling other brands in a dedicated retail store have over retail image. Furthermore, the next section also highlights how historically wholesale brands were manufacturers and the benefits associated with operating wholesale brand strategy (e.g. fewer responsibilities with training staff, paying rents and etc.), which differentiates retail brand strategy from a wholesale oriented business, in the UK fashion industry. The findings are also summarised in a form of model below, see figure 7.1.

Figure 7.1: Differences between retail and wholesale brands



7.2. Definition of Retail Brands

Within the retail and marketing literature, authors (e.g. Arce-Urriza and Cebollada, 2012; McColl and Moore, 2011), used a range of terminologies to discuss the concept of branding a product and process as part of a retail brand strategy, such as retail brands, store brands, private label brands and own brands. However, contradicting this, an agreement has been observed among retail respondents (e.g. Company A, B, C, D, E and etc. refer to table 5.9 in chapter 5), that the term ‘retail brand’ is not a very familiar term in the UK fashion industry. Instead, retailers that are brands in their own rights more frequently use terminologies such as high street brands and/or boutiques, with wanting to develop recognition as the designers of the high street. For example:

“[...] we don’t use the terminology retail brands, we just class our brand as a high-street brand, and would like to be seen as the designers of the high street” (Buyer A, Company A).

Similar to authors (Ailawadi and Keller, 2004; Davies, 1992; McColl and Moore, 2011), definition of retail branding, an agreement was evident among retail respondents of companies A and B. This asserted that the focus of own brand labels, solely designed and sold in an own retail chain and store is still considered an important part of the UK fashion business; thus, the concept of retail branding is still utilised by some retailers, through a range of own franchise stores and international joint venture stores. For example:

“We have 270 stores in the UK, and we franchise stores internationally, and then we are also involved in the joint international venture stores, but we don’t sell our brand within any other store” (Buyer B, Company A).

“We don’t have any external brands. We don’t sell in any other outlets, only within our own website and stores, so we can have more control on our brands”.
(Assistant Buyer, Company B)

Furthermore, corresponding to Amrouche and Yan (2012), all the respondents subscribed to the view that selling own branded products in an own retail chain or store is considered valuable, as it provides more control over the product merchandise. For example:

“[...] because with the control on the own brands you can absolutely present your Sunday best to the consumers, you can see how what they think of you and your product” (Store Manager, Company E).

One of the key benefits of retail branding, as identified by Mitchell et al (2012), was superior profit margins. This was confirmed by a respondent of company L, a representative of a component supplying company, historically known for manufacturing threads in the UK, suggesting that selling own label products in an own retail store provides opportunities for higher margins:

“For going into retailing yourself, it gives you more control, gives you potentially higher margin” (President of Apparel and Footwear, Company L).

Additionally, literature on retail branding indicated how the store image (e.g. merchandise, service, physical facilities, convenience, promotion, store atmosphere, and post-transaction satisfaction) has an effect on brand's image (Ailawadi and Keller, 2004; Sullivan and Adcock, 2002), and thus brand equity (e.g. Aaker, 1996; Kapferer, 2008). These implications are not only linked to the store, that is, retail outlet, but also to the product and brand strategies (e.g. price, promotion and advertising). For instance, Rubin (2015) reported in *Verdict Retail View*, that retailers that become heavily reliant on wholesale brand revenues indicate that they are lacking confidence and the ability to sell own products effectively. This is confirmed by a retail respondent from company A, who are well known on the UK high street for their style and affordable fashion, suggesting that selling only own brand labels in a retail brand store is a reflection of brand trust, loyalty and brand performance. In other words, the perception by the industry experts is that, if a brand moves away from selling own brand labels to introducing wholesale brands into a retail environment, this is often done in order to fill the shop space and to develop a better brand image by using other brands' profiles. For example:

“[...] for our business, I don't see our brand having anyone's else's product in our store. This is because we want to display our own products in our retail store. In my previous work, if the department weren't performing well, we would fill the floor space with other brands, using other brands profile to increase the revenue” (Buyer B, Company A).

Furthermore, the literature addressing wholesale branding has highlighted how a retail brand uses wholesale brands to generate customer interest, patronage and store loyalty (Ailawadi and Keller, 2004; Glynn and Brodie, 2012; Martenson, 2007) and develop brand positioning (Varley and Rafiq, 2014). In contrast, a senior respondent from a well-known British brand (company B), that continues to operate using a single retail brand strategy (see table 5.9 in chapter 5) has suggested that retailers that have a well-established brand image and history, are able to maintain their unique position in a market by selling only own label products, which continue to remain exclusive to the retail store:

“We are a single brand retailer; so basically we are so big and well known that we don't feel the need to sell our brands through other stores, like other fashion brand do” (Head of Department, Company B).

Additionally, in the literature of retail branding, Davies (1992) has also described retail brand as a process of experience that customers encounter as they walk into the store. Similarly, a retail respondent from the buying department of company J, (See table 5.9 in chapter 5) who refer themselves as ‘multi-channel retailers,’ with the main focus of distributing plus size clothing, have indicated the importance of in-store experience, which is linked to how a customer can touch and feel a product, and can increase purchasing intention. For example:

“In a retail store, consumers can touch and feel the product, which will lead to selling more pair of product and less return” (Senior Buyer, Company J).

Furthermore, in the literature on retail service, various authors (e.g. Davies, 1992; Kremer and Viot, 2012; Sullivan and Adcock, 2002; Varley and Rafiq, 2014) have suggested that consumers use cues such as physical store environment, location, the composition and the display of the assortment and the level of service, to generate a belief about a retail brand, which determines the attitude towards the retail brand store. Similar to this, a retail respondent from company A (See table 5.9 in chapter 5), well known on the UK high street for their style and affordable fashion, operating both retail and wholesale brand business strategies have suggested that indeed, store brands use visual merchandise; product assortments and window displays as branding tools to develop an identity, personality and a brand image. However, it has also been suggested that the way in which the visual merchandise, store design and display are laid out in the UK, depends on the location of the store, and the type of consumers to associate to that location. This, in particular, is because consumers' personalities, fashion, needs and demands vary from one location to another. For example:

“[...] Liverpool is described as a location where customers are seen to be very glamorous, and so our windows will focus on ‘going out’, ‘good times’ and ‘fun’. On the other hand, Richmond is a little bit smarter and sophisticated, more like yummy mummy; so the overall brand message will remain the same, but you will see a bit more of riding boots and blazers” (Wholesale Coordinator, Company A).

Moreover, literature on retail brands indicates how the process within a retail environment is determined by a multitude of retail store characteristics, such as location, convenience (Sullivan and Adcock, 2002), in-store design and ambient environment (Stuart, 2013; Kent, 2003), staff level and behaviour, customer service etc. (e.g. Davies, 1992; Foster and McLelland, 2015; Keller, 2010). In comparison, a retail respondent from the buying team of company A, that are well known on the UK high street for their style and affordable fashion, operating both retail and wholesale brand business (see table 5.9 in chapter 5) suggested that, in terms of marketing a branding strategy through staff behaviour and customer service, such as promoting source country of parts (e.g. material), the sales staff requires an opportunity to interact with the customer, which varies depending on the market positioning of a brand and product category, and is considered particularly difficult when selling clothing products. For example:

“From a clothing point of view, I think it’s much trickier to do that, as consumers don’t have interaction with sale assistant, they just pick the clothes and go and try the product, so it’s a bit of self service. Whereas, in footwear, you have a bit more interaction, because you have to ask someone for help in order to get the right size or other size. So that basically provides you with an opportunity to have one to one conversation about things, or promote stuff” (Buyer B, Company A).

In addition to this, a senior retail respondent from the buying department of company J, (See table 5.9 in chapter 5) who refer themselves as multi-channel retailers, with the main focus of distributing plus size, provided a more detailed explanation on the importance of service in retail branding, suggesting that it varies among different distribution channels. This, in particular, is an important issue for brands that are more online and catalogue focused, as they develop their brand identity by branding their service, and providing quality products such as fast delivery, online promotions, as well as service to customer complaints, and response to the market demand:

“[...] Service is the key thing for us, we have to make sure that product is delivered on the expected time; the quality of the product is good. How our profit margin works depends on what we buy and what we sell, pretty much depends upon the profit we make from no return. So, if we have less product returns, that means we have done well. This especially is, since consumers can’t try the product before making a purchase” (Senior Buyer, Company J).

In summary, the previous section 7.2 presented findings regarding the definition and strategy of retail branding. The next section will discuss the concept of wholesale branding, providing definition and strategies utilised by different types of wholesale brands, such as wholesale brands that were also manufacturers, retail brands that are becoming wholesale oriented brands, wholesale brands that came into the market as designer/premium brands, and some manufacturers that are now also wholesale brands, addressing the key factors that distinguish a wholesale brand from a retail brand.

7.3. Definition of Wholesale Brands

Based on interviews with the key informants of the fashion industry, it has emerged that different types of retailers and organisations are familiar with different terminologies, based on brands' expertise and history, and the level of the respondent. For instance, respondents from companies E, J and O, representatives of both retailers (e.g. Independent store and plus size clothing retailer) and manufacturers, (see table 5.9 in chapter 5) denoted that the term 'wholesale brand' is not frequently used; instead, different terms for wholesale brands have been expressed, such as independent and true brands. For example:

“So 30% of brands are retail brands, and the rest are *independent brands*, and I call them that because we don't own the rights on those brands” (Store Manager, Company E).

“do you mean a *true brand* as opposed to an own label, something like Padders I presume are like a wholesale brands” (Head of Department, Company J).

However, senior respondents (e.g. CEO, Marketing Director and President of Apparel and Footwear) from company G, H and L, representatives of both retailers and manufacturers were found to be familiar with the terminology, *manufacturer brands*. In part, this was because, as addressed in the wholesale brand literature, historically, some wholesale brands and even suppliers were once manufacturers in their own rights, as described by Dicken, (2015). This basically means that wholesale brands and suppliers were actually involved in the manufacturing or the production side of the business, in the UK. For example:

“[...] the business was organically a manufacturing company, which had the skills set of taping the seams for the raincoat... but now, we are the only British lifestyle brand, after [...], that are also recognised as manufacturers, with own-manufacturing facilities in Poland”. (CEO, Company G).

Furthermore, based on senior respondents (e.g. CEO, Marketing Director, President of Apparel and Footwear, Senior Fabric Technologist), see table 5.9, chapter 5, representatives of both retailers and manufacturers suggested that many wholesale brands and manufacturers that were historically involved in the production side of the business

were more focused on producing premium products that were made for a specific *purpose*. The *purpose* of the product associates with performance and durability, waterproof and/or wind protection (e.g. Coats and Jackets). This corresponds to literature (section 3.6), that indicates how wholesale brands are known for promising brand attributes, including brand name, strong brand message and product quality (Keller, 2003). For instance:

“It’s a family owned business, and it’s within its fourth generation now. So they were originally in the manufacturing side within the UK, mainly making out-wear products, such as coats and jackets, whereas now, whereas, now, we make blouses and dresses for design-led brands” (Senior Fabric Technologist, Company O).

Moreover, corresponding to Martenson (2007), it was suggested that retail brands use wholesale brands to increase customer interest, patronage and store loyalty. An agreement was evident among respondents from company A (see table 5.9 in chapter 5), known for their style and affordable fashion, that wholesale brands are sold by retailers so as to use their profits to increase market demand and to improve brand image. For instance:

“I think it attracts consumer in a sense that they are still coming into our store, which benefits us and the other brands we are selling. So consumers might come into the store specially to see jack jones product, and then they might find something of ours that they end up liking as well. So it’s like we are partners, trying to help them as much as they are trying to help us out” (Wholesale Coordinator, Company A).

Senior respondents, who were representatives of both retailers and manufacturers, e.g. Company I, known for their outdoor clothing products and e.g. Company L, traditionally well-known thread manufacturers, who are currently operating the business as component suppliers for premium branded products, have pointed out some advantages with reference to wholesale branding, such as, no investment and responsibility is required towards renting a space (bricks and mortar), fitting the store (Rhodes, 2015), training the staff, logistics (store replenishment and product availability), acquiring an IT system, and producing and merchandising mass volume products. The report by EY Retail Operations

(2013) denoted that staff training (store labour) is the biggest non-product cost asset of retailing, whilst a retailer also has to address other issues such as paying rentals, IT systems, and other maintenance costs (Rhodes, 2015; Varley and Rafiq, 2014), in order to achieve a superior profit margin:

“[...] it’s simpler to deal with wholesaling, because you don’t have to deal with Bricks and Mortars, the staff, logistics, bringing wider range, bringing product from different areas, so basically you don’t need a whole set of skills that you would need if you are a retailer” (Creative Art Director, Company I).

“[...] then you got to go get your IT systems, then you got to do your merchandising and then find the staff, and the cost of these things are quite high” (President of Apparel and Footwear, Company L).

Furthermore, another senior retail respondent from company G, and representative of a lifestyle brand with a rich British history reiterated the benefit of not paying rental prices; when displaying and selling products as concessions within department stores. It is also further explained that the concept of wholesaling within department stores is beneficial, because commissions pay the rents a brand amasses. For example:

“We rent the space in a department store, but we don’t really rent the space, instead we pay the commission. But you are effectively renting the space on a profit-relating basis, and I would say that is the fastest-growing part of our business, in broader terms” (CEO, Company G).

Likewise, Moore et al (2000) pointed out how foreign market involvement is extensive in terms of wholesale distribution. Similarly, the study found an agreement among all retail respondents regarding wholesale branding and distribution associated with international recognition and global business, and thus, allows fashion brands to classify themselves as global brands:

“We sell our brands in retail and wholesale, so yeah department stores as well. As a business I wouldn't know the main focus of the brand, but I would guess we sell more wholesale, because we sell worldwide” (Senior Designer, Company C).

7.4 Summary

Section 7.2 and 7.3 presented findings regarding retail branding, discussing the definition with reference to product and process, as previously proposed by Davies (1992), and wholesale branding (Chimhundu et al., 2010; Keiser and Garner, 2012). Several findings correspond to authors (Chimhundu et al., 2010; Keiser and Garner, 2012; Salmon, 2013), as can be seen in model 7.1. For instance, although the terminology retail and wholesale branding is not use in the industry, however, the concept selling own label brands in an own retail store is still deemed important, as is wholesale branding to expose brands internationally. Furthermore, it has also appeared that the major differences between retail and wholesale brand, as indicated by the key informants are, that wholesale brands do not have to rent the space as they displaying/selling products as a concession in a department store. With reference to retail brand, it has appeared that retailers have more control on the product merchandise as they display their own brand labels in an own retail store. However, it is predicted that, if retailers, that are known for traditionally selling own brand labels in an own retail store merchandise other branded products, then other competitors, industry and consumers form a stereotypical perception about the retail brand not performing well.

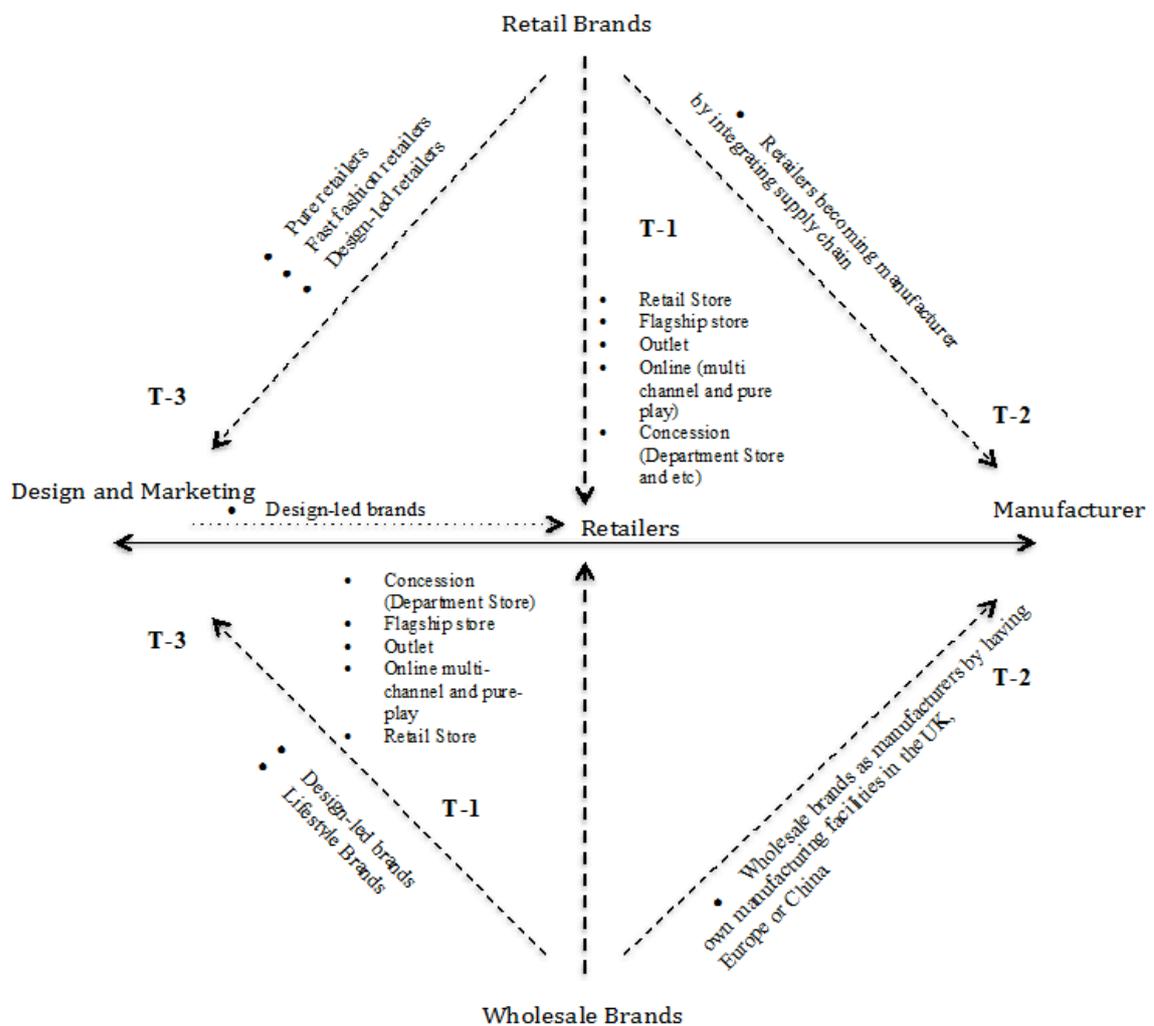
The next section will discuss the blurring differences between retail and wholesale brands, considering strategic and operational implications that had an impact on the fashion industry.

7.5. Blurring of Retail and Wholesale Brand Strategies

This section presents findings on how the distinguishing lines between retail and wholesale brands have been blurred in the fashion industry from the views that emerged whilst interviewing the key informants, for the purpose of understanding the impact of country of origin on retail and wholesale brands in the UK fashion industry.

Using an inductive approach, a typology has firstly been developed (see figure 7.2) to illustrate how retail and wholesale brands are blurring their boundaries.

Figure 7.2: Blurring differences between retail and wholesale brands



The typology above 7.2 illustrates three trajectories; trajectory 1 indicates how, in the UK fashion industry, the differences between retail and wholesale brands are increasingly blurring, with retailers using both retail brands by selling own brand labels in their retail stores, as well as becoming wholesale oriented businesses, by distributing their own brand labels via a range of the third party third distribution channels and stores. For instance, retailers are expanding through department stores (e.g. Topshop products are sold in Selfridges, and department stores in the UK, to receive global brand recognition (Company J), as well as using wholesale strategy (e.g. brands such as Jack Wills and River Island) on pure-play retailers, especially ASOS and other international e-tailers (e.g. Nelly and Zalando). The key benefit of using wholesale strategy on pure-play retailers and other e-tailers is that the retailers can expose own brand label internationally, and improve their brand image nationally. In other words, retailers can implement wholesale strategy via online retailers as an international market entry method. An online retailing only approach to international expansion can offer cheapest and lowest risks (e.g. packaging, training materials, and in some cases identifying the country of parts and country of manufacture). Thus, it is evident that online retailing is having an increasing impact on how the differences are blurring between retail and wholesale brands. However, considering country of origin implication in the blurring of retail and wholesale brands, retail respondents mentioned about how brands heritage is important and associated with their long history, which is also conveyed on an own brand website (e.g. M&S and Barbour) and other retail websites (e.g. Jack Wills on ASOS). For example:

“[...] we wholesale our brands to ASOS, and other international e-tailers, which is great because we can expand internationally, through other overseas e-tailers. Especially because ASOS is globally recognised in Australia, China, and when international customers recognise our name, it gives us confidence that our brand is right for that market” (Wholesale Coordinator, Company A).

Furthermore, respondent from company G and H, both representatives of British lifestyle brands, that could traditionally be categorised as wholesale brands have aligned their characteristics closely with retail branding, by selling own brand labels as multi-channel retailers, including own websites and own brand stores to have more control on the product margin, product marketing, product merchandise, price, and profit margin:

“[...] in the UK we have 80 million pounds worth of turnover, with 60 million done through wholesale, and 20 million sales is through our own standalone stores” (Marketing Director, Company H).

In typology 7.2, trajectory 2 illustrates how some retailers are also becoming manufacturers, by having a vertical supply chain system to have more control on the product and manufacturing, but also to reduce the delivery lead-time (e.g. Topshop, River Island, JD Williams), linked to proximity (Barnes and Lea-Greenwood, 2006). In this respect, the manufacturing is known for having EU origin, as most of the vertical supply chains are located at home, or nearby locations, such as Italy, Portugal, Poland, and Turkey. On the other hand, Dicken (2015) suggested that some wholesale brands were manufacturers in their own rights. This has been confirmed by the interview with the key informants, that some (very few) still have manufacturing systems in the UK, for example, Burberry and Barbour, and thus, this provides the fashion brands to prestigiously take pride in promoting Made in the UK or EU. For instance:

“[...] we label our self as a retailers, providing own brand strategy. But we are also manufacture, so we manufacture our footwear range in Italy... which allows us to have more control on our product labels” (HR Manager, Company F).

Another example is from a senior retail respondent of company H, representative of a lifestyle brand, with rich British history, who are also *manufacturers* in their own rights, explaining how they are managing their manufacturing facilities based in the UK, associated with ‘Made in UK’, whilst being a known lifestyle brand, but the main majority of clothing production is held overseas. For instance:

“So in terms of what we do, we are a manufacturer. So we basically have a factory on the other side of the hallway, which is divided between the head office and the retail store, making the core [...] product with approximately 170 machinist.. but we

manufacturer majority of our products in different countries”. (Marketing Director, Company H).

Finally, the trajectory 3 in typology 7.2 illustrates how retail brands and wholesale brands have blurred their differences by becoming design and marketing oriented businesses. The concept of design, as previously mentioned in the country of origin chapter 2 and 5, can be linked to where the product is designed. In this case, products are designed in the UK for almost all type of brands, in order to have control on the product design, performance and features. However, the concept of retail and wholesale brand becoming design and marketing oriented businesses also associates with how all retailers in the UK fashion industry are using a range of marketing activities, encompassing investing on the advertisement, online marketing, social media marketing, retail marketing, celebrity engagement and brand collaboration. For example, design-led brands (e.g. Hobbs London, Joules and Boden) that fits in the category of both wholesale and retail brand; doesn't invest in the advertisement, but instead, they promote their British, craftsmanship, brand identity through service, brand name, layout, visual merchandise and word of mouth. For instance:

“[...] we are a traditional English brand, with the history of craftsmanship and pin-sharp attention to detail, our aim therefore is to create self-assured wardrobe iconic piece with the unique features that would point out the differences, personality and integrity...well we don't invest in advertising, we want our customers to know about us through word of mouth and through our customer service” (HR Manager, Company F).

Similarly, it has emerged from the interview with the key informants of company A and company H, that previously, retailers (e.g. River Island, H&M and others), that were historically not as involved in advertisement, are now equally as involved in TV advertisement, social media, international collaboration, as retailers that were traditionally known for using wholesale brand strategy. Thus, retailers are becoming more focused on marketing their brand identity than the actual sale itself. For example:

“[...] It’s all about the fashion and we love it, it’s our passion, which comes across through our store layout, store staff, and our window display. So it’s all about tongue-in-cheek marketing, and we don’t like to take our sale to seriously” (Buyer B, Company A).

Likewise, retail respondent from company H, who are known for their rich British history in lifestyle brands, explained the importance of collaborating British brand identity with a foreign brand identity in order to create awareness and to gain market attention. For example:

“We are going to have collaboration with an Australian brand called “Deus Ex Machina”. So it’s an Australian brand, and we are a very traditional, best of British, meeting with this Australian brand. Put them together, you get the collaboration, gets in the press, and interest” (Marketing Director, Company H).

In brief, typology 7.2 was developed from the findings illustrating how the differences between retail and wholesale brands have been blurred in a context where both retail and wholesale brands are operating as retail oriented businesses (multi-channel) using all types of channels and retail formats, becoming manufacturers by having some ownership of the manufacturing facilities to provide quick delivery and to have control over the product. Finally, the companies are also becoming design and marketing oriented businesses by using a range of marketing activities and designing the products in the UK to meet customers demand. The next section discusses the strategies and operation implications of the fashion industry, whereby; the fashion industry is making strategic decisions to remain competitive in the evolving market. This includes, marketing, retail pricing, and product quality, targeting customer segmentation and supply chain management. The sub-sections also address issues relating to the blurring of retail and wholesale brand strategies.

7.6. Implications

This section discusses the strategies that are being implemented in terms of the blurring of retail and wholesale brands, but also considers the operations that are deemed as a source of competitive advantages. Finally, this section also addresses the issues that need consideration relating to the implantation of retail and wholesale brand strategies with specific reference to the UK fashion industry. The above-mentioned issues are discussed in the context of marketing, retail price, product quality and supply chain management.

7.6.1. Marketing

This section presents strategies and operation implications with reference marketing activities such as online and offline communication strategies, which includes investing in photo-shoots, use of British iconic models and international celebrities to create awareness, and use of British taglines to maintain the British identity.

With reference to marketing activities, retail respondents (e.g. company G, H, J), who were originally wholesale oriented businesses, but are currently using retail brand strategy as well (see table 5.9 in chapter 5), have suggested that they distinguish the prestigious, premium image from a regular retail brand by investing in promotional activities such as online and offline communication, with the support of creative teams and carrying out regular photo-shoots, which enables the brands to maintain a premium image and to generate a brand identity. This goes in hand with Jack and Shaw (2009), who pointed out how large fashion organisations often have enough financial resources to have a combination of own creative team and external advertising specialists, driven by the brands positioning in the market. Given the pressure of creating branding strategies that are designed to communicate individuality to the targeted audience (Birtwistle and Freathy, 1998), particularly in the market where retailers are brands in their own rights, it is pertinent for wholesale brands to invest in a wide range of marketing strategies:

“[...] because we automatically generate a brand by our creative team, which involves going onto photo-shoots and doing all the marketing that is done to develop a brand. Whereas, historically, retailers weren't very much involved in the advertising, but instead they created their original marketing, which said, we are great come to us (CEO, Company G).

“I think people have to keep up with it, so therefore, if they were just wholesale brand, they have to advertise online to obviously generate that extra demand, but then they may think there is a possibility to be on high street, especially as there is a change in consumers taste and the way they buying things and expectations” (Assistant Buyer, Company K).

However, the findings from the retail respondents of (company G, H, J) also indicate, how fashion businesses are facing challenges in terms of the obscurity of retailers becoming wholesale brands, and wholesale brands becoming retail oriented, as retailers have had to invest in creative teams, photo-shoots and advertisements to develop recognition as a brand, and wholesale brands have had to create an original marketing strategy in a retail environment to differentiate their image from that of the typical retailer of the high street. For instance:

“[...] brands going into retailing have to go and create original marketing, which is a psychological challenge for brand like ours, but it is isn’t for brands like H&M, because it’s part of their DNA” (CEO, Company G).

Furthermore, it has emerged from the interviews with the retail respondents of companies G and H, who are both representatives of lifestyle brands, with rich British history, that the British association is the identity of these premium lifestyle brands. The British connection represents quality, and thus, these lifestyle brands use original British taglines everywhere on products, online and in-store.

“We are a British brand. As a brand, we are the original British [...] brand. And that is the tag line we use on everything (CEO, Company G).

Taking into consideration the impact online marketing is having on this blurring of retail and wholesale brands, all the respondents subscribe to the view that online marketing is a strategy used by all retailers to promote country of origin or brand origin, using heritage taglines, having association with the UK mills, and developing social media competition to

create awareness and increase brand loyalty. However, the strategy and the type of information they promote can vary depending on their brand positioning, strategic business plan and history. For instance:

“we don’t necessarily promote that it is designed in the UK, apart from where when it talks about our brands story on our website” (HR Manager, Company F).

“[...] within our brand, we engage a lot with our consumers. What we find is that our consumers love to tell us about their experiences, so we do a lot of that through Facebook, twitter, online, maybe start off a competition saying send us a picture of you when you wear a jacket, and you and your dog and whatever” (Marketing Director, Company H).

Likewise, the retail respondents of companies G and H, both representatives of lifestyle brands, with rich British history, have indicated how they are actively engaging with British iconic models and brands, along with international engagements and collaborations in order to maintain their British brand identity, lifestyle image and position in the fashion industry. This goes in hand with Usunier (2011), who suggested how country of origin can be implemented in marketing activities, whereby celebrity endorsers can be used (or not), to suggest the brand’s origin. For example:

“[...] when we are working together with another brand, for example Paul Smith, then it’s like both selling fashion brands, and the principle is that when two great names come together, they increase awareness and increases interest towards both brands” (Marketing Director, Company H).

“But we do heighten British Association when supplying to our official suppliers, such as [...] is British but He got together a syndicate to bring back the American cup back home” (CEO, Company G).

Furthermore, with reference to the blurred differences between retail and wholesale brands, it has appeared that all UK fashion retailers are greatly involved in developing international recognition, by collaborating with foreign brand identities and international celebrities, to develop brand awareness and interest in the global market and to increase brand positioning. For example:

We did a pop-up store in the US after online wholesaling with ASOS. So obviously the collaboration with Rihanna got our brand name out and got us more involved in the global market” (Buyer B, Company A).

“We are going to have collaboration with an Australian brand called “Deus Ex Machina”. So it’s an Australian brand, whereas we are a very traditional, best of British, motorcycle clothing type brand, meeting with this Australian brand, put them together, you get the collaboration, gets in the press, and interest” (Marketing Director, Company H).

7.6.2. Retail Price

This section presents a generic understanding of how retail pricing is allowing retailers to position themselves in the market, especially as they are using both retail and wholesale brands. This section also addresses the issues that are linked in the shift of retail and wholesale brands.

Authors (e.g. Keller, 1993; McGoldrick, 2002; Varley and Rafiq, 2014) have suggested how a brand image can be conceptualised through the use of functional and symbolic aspects (see chapter 1, section 1.3 and chapter 3), as well as by brand attributes such as retail pricing strategy. Similar to this, retail respondents of companies C, D and F, that are design-led retail brands, with their focus comprising premium apparel products have suggested that niche retail brands (e.g. Boden, Jigsaw and Hobbs), differentiate their brand image from fast fashion (high street brands) by providing the unique design product with premium quality and product pricing, meeting the British standards and country image. The pricing strategy allows design-led brands to differentiate their brand identity and positioning from what could traditionally be categorised as a retail brand in the sense that

design brands solely focus on premium price strategy in a dedicated retail store, unless the product is discounted (e.g. on sale). For example:

“We have our own brands in the retail store, but we don’t want to look like the high street. So we don't provide fast fashion brands, but instead we provide design, quality products which are of course higher for the luxury prices” (Buyer, Company D).

Another retail respondent from the buying department of company K, (See table 5.9 in chapter 5) who refer to themselves as a multi-channel retailer, with their main focus on catalogues and online marketing, providing quality casual clothing, have suggested that the products are priced differently in a range of retail channels, depending on the market segmentation, brand positioning and even location. For example:

“[...] we have two pricing strategies going in our retail brand, we have full price on catalogue and then we have outlet. The outlet stores use to carry a specific broad range, so the buyers would go out to buy a range of product suitable for the product, but now we have a full price range as well” (Assistant Buyer, Company K).

However, retail price strategy can also be deemed as an implementation issue in the evolving market where the differences between retail and wholesale brands are blurring. For instance, senior retail respondents from companies G and H, which are known for their rich British history in their lifestyle brand have suggested that in order to expand into an own brand retail and increase the store loyalty, a brand needs to broaden the product offering, and reduce the pricing policy to attract a wider market. Likewise, based on the feedback from the interview with the company B, which is the only company that can actually fit in the category of a retail brand, retailers that are brands in their own rights merchandise both lower price products and premium price products. However, it is evident from the interpreted interview with company B that the majority of sale profit comes from value clothing profit. As a result, these pricing implementation issues are in line with McCormick et al (2014), who suggested that the price of the product has become a crucial

issue for many fashion retail brands, especially during the last five years, which was due to the recession, combined with consumers becoming less loyal and less willing to pay more for fashion. However, senior respondents from company H also explained that this is one of the reasons why some wholesale brands moved back to becoming only wholesale oriented business, as the expansion of own retail store was not only less profitable, but was also obscuring their brand image. For example:

“[...] the differences are that when you open your own store, you have to broaden your product offering than you normally would, and that puts question into pricing policy. This is in a sense, that you don't end up achieve as massive deal but obviously, if you want people to keep coming into your store...” (CEO, Company G).

“I think it's because they want to broadened their consumer age group, and sometimes brands can't afford it so they tend to do a water down range to increase the sale, which makes is more affordable to everybody” (Assistant Buyer, Company K).

7.6.3. Product Quality

This section presents findings concerning product quality, considering factors that are blurring the differences between retail and wholesale brands, such as, quality promises embedded in marketing activates (brand message), quality association with the British country image, and also how this allows retail and wholesale brands to differentiate their positioning.

The literature on branding in chapter 3 has indicated that branding a product and/or service is the key for any successful business, which enables differentiation from its competitors (e.g. Aaker, 1991; Doyle and Stern, 2006; Kapferer, 2008). However, a senior respondent from a well-known British brand (Company B), that continues to operate a single retail brand strategy (refer to table 5.9 in chapter 5) has explained in detail how UK retailers are

positioned differently in the fashion industry, based on their brand values, expertise and strategic decisions, such as value and quality, and volume of the product. For instance:

“So we are number one in value and quality, Primark is number 1 in volume, number 2 in volume would be George, number 2 in value would be next, and none of them make anything about country of origin at all, so they are all very different” (Head of Department, Company B).

Furthermore, a senior respondent from company B, which operates a single retail brand strategy, and a retail respondents from the design team of company C, well known for their product performances, designed for multi-purposes have denoted how the quality, value and innovation of their product and service offers, reflect their brand message and brand identity. Considering country of origin in this context, chapter 6, and section 6.3.3.2.3 have previously addressed how British sells as perceived ‘quality’. Based on this, it is evident that country of origin can be implemented as indirect marketing techniques, whereby; the country of origin associations reflects brand messages and brand identities. For example:

“[...] Our brand message is about this 24 hours life, a garment that you can wear at any point” (Senior Designer, Company C).

“Our brand message is about quality, value and innovation, and all our products need to feed into that” (Head of Department, Company B).

Furthermore, another retail respondent from company B, (see table 5.9 in chapter 5) further explained how their own brand labels are associated with quality and innovation, and these are portrayed through their specific premium collection, hosiery products in particular, which are associated with Scottish mills and UK factories. This goes to show the importance of heritage history of UK clothing and textile production, which is associated with the quality, especially within the department of hosiery production. The hosiery production in the UK was considered one of the most important sectors of clothing and textile production, because it was labour and capital intensive (Jones, 2006). As such, hosiery is still considered important, and increasingly reflects quality and British image.

However, with the development of machinery and investment, the hosiery production is now more machine intensive, rather than labour intensive. For example:

“[...] for instance, in lingerie we have one factory in the hosiery factory in the UK, which are machine intensive, with skilled workforce and technical innovation, rather than labour intensive, and then we have [...] collection which is much higher value, but that costs so much more, and its more premium, with quality fabric from Scottish mills, and tailored jackets” (Assistant Buyer, Company B).

Furthermore, retail respondents (e.g. Company C, D, F, H, J and K), representatives of multi-channel retailers and design led retail brands (see table 5.9 in chapter 5) suggested that although retail and wholesale brands are becoming blurred by using similar strategies, the way they differentiate their identity in the market is by providing premium quality products, targeting a niche market, and not making it available for everyone. For example:

“[...] high street brands are considered as low end cost but with higher turnover, whereas, wholesale still wants to keep that niche part of the higher, premium brand image, but then they have still got to be out there, because if they are not then they lose sales, so it's keeping their identity and making sure that they are not going to be classed as a quick sale, so still keeping the quality but not being available to everybody” (Assistant Buyer, Company K).

It is further reiterated by a senior respondent of company G and H, that are well-known British lifestyle brands, known for their long history, that the purpose of designating different product range to different segmented market in the UK is because, the core targeted market prefers shopping in stores that are specifically targeted to the niche market, fulfilling their needs and expectations:

“[...] so through having different segmentation and collection, we can sell different product ranges to different people, because the way it works is, people here would not be happy if they are were buying exactly the same product as what is sold in our retail stores, they like to have differentiation, so what we do is; well sell

different slices to different people. The consumers that shop in our stores would be radically different to any other stores” (Marketing Director, Company H).

Furthermore, literature on country of origin, previously addressed in chapter 2, section 2.5 has found that consumer’s judge the quality of the product based on their stereotypical perception of a country’s image. Nevertheless, a retail respondent from the buying department of company K, (See table 5.9 in chapter 5) who refer themselves as a multi-channel retailer, with their main focus on catalogues and online, providing quality casual clothing have advised that consumers have accepted that fashion products are manufactured overseas. As a result, the quality of the product is no longer judged on the basis of where the product is a manufactured. Furthermore, McGoldrick (2002) adds to this, that consumers do not make an association with quality when purchasing lower price products. Thus, the quality of the product is judged based upon the prices consumers pay for the product. However, a retail respondent from company B, that continues to operate single retail brand strategy (see table 5.9 in chapter 5) also pointed out that the quality of the product does not have an impact on the majority of current consumers purchasing behaviour, as long as the product is at an affordable price and manufacturing is within British standards and expectations:

“[...] our customers still want good quality products, manufactured to British standards, but they would rather have the affordable prices, with the benefits of manufacturing abroad” (Assistant Buyer, Company B).

Furthermore, another senior respondent from the buying department of company J, (See table 5.9 in chapter 5) who refer to themselves as multi-channel retailers, with the main focus on plus size clothing, pointed out that consumers from other European countries have a greater tendency to purchase quality products as opposed to the UK consumers, and thus, fashion brands are investing more into proximity manufacturing so as to achieve fast fashion as opposed to using European country of origin as a unique selling point. For example:

“[...] the UK consumers mentality is to purchase loads of clothing products for £100, whereas, other Europeans would invest £100 on buying one good quality product. So this is why we are aiming at the fast fashion concept”, (Senior Buyer, Company J).

7.6.4. Customer Segmentation

To understand how a retail brand distinguishes itself from a wholesale brand in the fashion industry, each retail respondent was asked about the company’s background and their target audience. From the interview with the key informants of the fashion industry, it became apparent that the differences between retail and wholesale brands have also blurred with reference to targeting customer segmentation. This is in a sense that both are retail and wholesale brands are targeting a wide market audience, however, they differ in the strategies they use, these are addressed below.

From the findings, an agreement was evident among all retailers about how high street brands, referred to as retail brands in the literature (Ailawadi and Keller, 2004; Burt and Davies, 2010; Davies, 1992), often target mass consumer markets, also identified by Goworek and McGoldrick (2015). However, it is apparent that a retailer differentiates its customer’s segmentation in a retail brand by providing a brand collection targeted to a specific market. For instance:

“[...] we have a big core 55+ plus market, but we are trying encouraging younger 35+ age group market as well. We do tend to have younger customers internationally and nationally, in the UK; who are attracted through our sub-brand collection” (Assistant Buyer, Company B).

Furthermore, it has emerged from the interview with the retail respondents e.g. company A, B and J, (see table 5.9 in chapter 5), that the purpose of a retailer is not to differentiate a retail image by targeting a specific market. Instead, the retailers aim to make the product offering and service available for all age groups. For example:

“[...] We have a huge range of customers going up to 60’s and 70’s, as we don’t like alienating anyone. So, we would like to think that there is something available for everyone” (Buyer A, Company A).

Likewise, another senior retail respondent of company H, representative of a lifestyle brand, with a rich British history, explained how sale is made through wholesale branding and through own retail stores, suggesting that premium retailers potentially have a much broader market than retail brands. Thus, to reach out to a wider market, wholesale brands often provide branded products in a range of premium and luxury department stores, as well as independent stores, within specific locations:

“[...] you will find a lot of our brand in John Lewis, House of Fraser, Selfridges, Primark, and regent street, as supposed to bond street. The regent street provides affordable product, but are still premium price” (Marketing Director, Company H).

Furthermore, it has also appeared from the interview with the key informants of the fashion industry that the blurring of retail and wholesale brands is having an increasing impact on the customer segmentation and targeted audience. This is being said with specific reference to how fashion retailers that previously targeted the old market are looking to attract the younger market through the development of own brand strategy and/or by introducing more sub-brand collections. Thus, in the current rapid and unstable economy, it is considered important for fashion retail brands to broaden their age group, providing new appropriate styles, designs, fit and fast fashion products through the internet and own retail stores, with the objective of attracting a younger market, along with maintaining traditional loyal customers. For instance, a senior respondent from the buying department of company J, (See table 5.9 in chapter 5) who refer to themselves as multi-channel retailers, with their main focus being on distributing plus size clothing products, has provided an example of home catalogue shopping, suggesting that previously, the role of catalogue retailing was to provide specific products that were to fit the niche market, e.g. over fifties age group. For example:

“[...] the customer demographic at [...]a is 50+ for [...]b. Now the challenge we have got for the business is to drive both of the customers average age to younger market, looking at [...]a to age 45+ and [...]b 25+. So we are also intensively focusing on Internet and have also opened jewel fascia stores, an own brand retail store with two company owned brand names, to build brand awareness” (Senior Buyer, Company J).

In addition to this, it has emerged that brands that could traditionally be categorised as wholesale brands or wholesalers are prominently concerned about losing their loyal customers (e.g. +55 markets). This is with specific reference to how brands are evolving their marketing and branding strategies (e.g. TV advertisement), along with the development of retail brand strategies to attract the younger market:

“We will still remain very important in providing wide fitting products because I think that is where we are the market leaders. However, it is important now that we start looking at the standard fittings because a lot of our new customers that we are recruiting aren’t wide fittings. The traditional way of recruiting this is through, i.e. press campaign, and they are becoming a bit obsoleted. The new TV adverts, of course, with (Face of the Company) being our brand ambassador is bringing the young customers and not necessarily the wide fitting footwear customers, who were originally our target market” (Senior Buyer, Company J).

7.6.5. Supply Chain

This section presents findings relating to offshoring garment production that comprises one of the key strategic decisions fashion brands made, which increasingly blurred the boundaries between retail and wholesale brands.

All respondents have suggested that the cost of manufacturing became extremely high about 20 years ago, and that it pushed all manufacturers to move their own factories from the UK, and to sub-contract with overseas manufacturers. This movement of

manufacturing was to seek competitive location advantages such as low labour costs. A similar view has been expressed in chapter 1 and chapter 2, where research identified the competitive advantages associated with offshoring/outsourcing (Dicken, 2015; Perry et al., 2013). For example:

“ About 20 years ago the cost of manufacturing became so high, that fashion brands/retailers had to do something about that, so they basically relocated offshore, to various places. Some of them set up their own factories, so they basically moved their factories from here to here, but the vast majority just outsourced it all” (President of Apparel and Footwear, Company L).

It was further explained that the demand for overseas production resulted in significant changes within the fashion industry, whereby some wholesale brands, who were once also manufacturers in their own rights ended up moving and setting up their own factories overseas, whilst the majority outsourced their garment production through contracted suppliers. As a consequence, the majority of manufacturers stopped garment production within the UK, and transformed into business-to-business brands (e.g. sourcing companies or marketing organisations) or sales brands, distributing through a range of channels (e.g. independent stores, department stores and own retail outlets). For example:

“[...] then you will see brands that became retailers and opened their own retail store, whilst other brands have a mixture of owning the manufacturing system, plus they are also involved in the sourcing operation, for example, VF Clothing, Van Dale, Hush Puppies, and Clark. So, they are all suppliers and brands, they have their own factories, but they also have contracts with other suppliers” (President of Apparel and Footwear, Company L).

Furthermore, another senior respondent from company Q, a representative of a textile and fashion company, that is known for providing funding and support to manufacturers (refer to table 5.9 in chapter 5), suggested that the known British retailer, M&S, was one of the first fashion companies to switch to overseas production, thus impacting the UK fashion business. For example:

“The UK was the first country to start overseas production, with M&S being one of the first companies to do this. They manufactured in the UK, as to many people did, but then it was an equal in France. Then M&S switched, the first started manufacturing in Israel, when Israel became expensive they moved to Jordan, and then from there, they moved to China, India and Pakistan” (International Director, Company Q).

According to all the respondents, it was evident that all retailers make use of offshore garment production in order to satisfy UK customers’ demand for cheap clothing, especially as the cost of labour is extremely high in the UK and the majority of the Europe. This finding goes in hand with Ross and Harradine (2010) pointing out that the boundaries between value and middle market retail brands have somewhat blurred, as value retailers have changed their strategies from selling “cheap clothing” to “cheap fashion”, (P.351) as both types of retail brands are mainly involved in sourcing and manufacturing from lower labour cost countries, For example:

“I mean there contracts went away overnight, consumers weren’t really interested in where things came from, they just wanted it cheaper” (International Director, Company Q).

“They still want a good quality product, manufactured to British standard, but I think they would rather have the price, with the benefits of manufacturing abroad. I think customers don't care that we have lost the manufacturing in UK” (Assistant Buyer, Company B).

7.7. Chapter Summary

In summation, this chapter re-examined the definition of retail and wholesale brands. This was done in the context of the differences between the two being blurred, since Davies (1992) proposed the concept of retail branding associated with product and process. The blurring differences between retail and wholesale brands emerged from the qualitative interviews that were conducted for the purpose of understanding the impact country of origin had on retail and wholesale brands in the UK fashion industry.

The chapter was analysed using a thematic approach, and was structured using these five broad themes, 1) providing a new definition of retail branding, 2) wholesale brands, 3) the blurring of retail and wholesale brands, 4) strategic and operational implications with reference to marketing, retail price and product quality and 5) strategic implication with reference to demand for overseas manufacturing.

To summarize the findings, the study found that the terminology ‘retail brand’ was not a common term used in the UK fashion industry, as interpreted by key informants of this study. However, the concept of selling own brand labels, as defined by (Ailawadi and Keller, 2004; Davies, 1992; McColl and Moore, 2011) in a dedicated retail store is still considered an important branding strategy, as this provides retailers with control on the product merchandise and superior profit margin, (e.g. Amrouche and Yan, 2012; Mitchell et al., 2012) and impacts the retail brand image with reference to retailers performance, especially to retailers that could traditionally be categorised as retail brands. This particularly applies to retailers that could traditionally be categorised as retail brands, making a contribution towards the definition of retail brands and wholesale brands.

Regarding the definition of wholesale brands, the study found that the term ‘wholesale brand’ was also not frequently used in the fashion industry, but instead, terminology such as, true brands, independent brands or manufacturer brands were recognised as brands owned and created by manufacturers; as described by authors (Chimhundu et al., 2010; Dicken, 2015). Furthermore, the study found that wholesale brands are known for their strong brand name and promising quality, as identified by (Glynn and Brodie, 2012; Martenson, 2007; Keiser and Garner, 2012; Salmon, 2013), and therefore, retailers are using wholesale brand strategy to develop global recognition, brand image and to increase customer loyalty.

However, one of the major findings of this study is how country of origin impacts the fashion industry with specific reference to retail and wholesale brands. Thus, with reference to considering country of origin in the UK fashion industry, this study found that retail and wholesale brands can be differentiated by the way country of origin has implications on their strategic decision, especially within their marketing activities and cost leadership are the, which is considered to be the fundamental decision in order for

retails remain competitive in the current market (Bridson and Evans, 2004). For instance, the study found that retailers that were historically known for wholesale branding were more associated with country of origin dimensions, particularly brand origin (e.g. using it as a promotional tool on brand name, Union Jack Label, use of green colour to associate with Scottish Heritage, or going for a more clear aesthetic (having less grey colour association within the product). This is to make the product more appealing for the European market, rather than just having British vintage association. Furthermore, the study also found that wholesale also deemed country of parts as an important dimension, associated with having a history of being either innovators of the material and/or a production strategy (e.g. Aquascutum, Barbour and Burberry), and thus, associated as the key medium of country of origin.

Furthermore, the study also indicates how retail and wholesale brands use celebrity endorsement (national and international), and other foreign and national brand collaborations, which can represent the brand origin, or make the origin more fuzzy, but helps to create brand awareness.

On the other hand, retailers that could traditionally be categorised as retail brands (e.g. Dorothy Perkins, Oasis and etc.) were less involved in the actual promotion of country of brand origin, but considered it important as it associated with brand heritage history. In the same vein, 'Made in [...]'' was considered important as part of strategic business plan, such as sourcing to nearby countries to reduce lead-time and provide swift fashion in the retail environment. In addition to importance and impact of country of origin, country of parts is considered less important by retail brands, unless sourced from a country that was known for its expertise, or had a reputable country image. Thus, it is displayed on a product or conveyed via customer service if the brand is using components or materials sourced from a recognised country, such as Italian Fabric or Harris Tweed, as it is considered as a unique selling point, adding a significant contribution to the literature of country of origin, branding, marketing and supply chain.

In brief, the study adds new knowledge on how country of origin dimensions are considered important and impact different types of fashion businesses depending on a

brands' expertise, positioning, level of respondents expertise, brands history, and brands value, vision and mission.

Through the interviews with the key informants of the UK fashion industry, the study found that the differences between retail and wholesale brands have significantly blurred, this is illustrated in figure 6.2.

One of the key factors that have blurred the differences between wholesale and retail brands is the overseas garment productions, which is found to be due to the lack of skills, space and resources in the UK, and thus, overseas production has been perceived as better quality by the industry experts, contributing to the literature of supply chain, globalisation and country of origin.

Moreover, the model in figure 8.4 developed from the interpreted analysis particularly indicates how both retail and wholesale brands are using all types of retail formats and channels in the UK fashion industry, and that the online retail environment is becoming one of the major channel impacting this blurring of retail and wholesale brands. For instance, in section 7.5, the interpreted findings highlighted how retailers are becoming wholesale oriented businesses, by selling their own label brands on pure-play retailers that are globally renowned. This online expansion is for the purpose of international expose, expansion and to improve the brand image.

Furthermore, another major factor blurring the differences between retail and wholesale brands is how retailers that could traditionally be categorised at retail brands, are becoming manufacturers, by operating a vertical integrated supply chain, in nearby locations, in order to have control over the product, quality and delivery. On the other hand, retailers that could traditionally be categorised as wholesale brands were already regarded as manufacturers, with their historic engagement, or (very few) currently still in involved in the production of the garment.

Finally, the last key factor identified in this qualitative study with the key informants is how retail and wholesale brands are both becoming design and marketing oriented businesses, whether it is by focusing more on the promotional side of the business then the

actual sale, or investment more or less on advertisement, or using store marketing to improve the brand image and to remain competitive in the market.

Nevertheless, one major common factor that has increasingly blurred the differences but also country of origin implications are, the context of country of design. This is being said in a manner that both wholesale and retail brands mostly design their products in-house or in the UK to satisfy the customer's demand, as country of design is considered to have implications on the brand image. However, both retail and wholesale brands do not directly convey country of design through direct marketing i.e. labelling that the product is designed, or having connotation in other marketing activities, but instead, convey the brand origin and British design by incorporating quality in their brand message and product offering.

Thus, to conclude, it is evident that although country of design is considered as an important country of origin construct, it has no implications on the branding aspects. In light of the interpreted data analysis, this could be due to the fact that UK consumers do not necessarily care or show interest in where the product is manufactured, or designed when making purchasing decisions.

The next section will provide a conclusion, which will summarize the entire research and contribution to knowledge in the literature of fashion marketing, retail marketing, country of origin, branding, and to the structure of the fashion industry.

Chapter 8: Conclusion

8.1. Introduction

This study aimed to examine the impact that country of origin has on retail and wholesale brands in the UK fashion industry. The research deals with country of origin from both manufacturing and branding aspects (see figure 8.1 below), which is the key contribution of the study, adding new knowledge concerning strategic action in the use of various dimensions of the country of origin components, to the literature on fashion marketing, branding, retailing and supply chains as well as providing new knowledge in the area of COO from an industry standpoint. This research informs an understanding of country of origin, what it means to fashion retail and wholesale brands, the perceived importance of each component of COO dependent on a brand's heritage history, expertise, strategic business plan and brand values, and how each component is used as a branding tool.

Another contribution of this study is in outlining how the differences between retail and wholesale brands have blurred in addition to the strategic decisions fashion businesses are implementing to position themselves and remain competitive in the evolving fashion industry. Thus, this contributes to the literature on retailing and to the structure of the fashion industry, providing scope for further research.

8.2. Aim

The aim of this research is to examine the impact country of origin has on the UK fashion industry, with specific reference to retail and wholesale brands.

8.3. Objectives

In order to achieve the research aim, the following objectives were identified:

1 – Examine the current literature on country of origin with particular emphasis on evaluating the components and different concepts of country of origin, in the specific context of retail brands and wholesale brands in the fashion industry.

2– Investigate industry perceptions of country of origin via a series of key informant interviews from the fashion industry incorporating retailer and manufacturer perspectives.

3 – Analyse data to develop a typology of strategic actions with regard to the optimum use of the various dimensions of the country of origin concept in the context of the UK fashion industry.

8.4. Impact on theory and practise

This study builds upon the existing conceptualisation of country of origin adding new knowledge from industry perspectives with specific reference to retail and wholesale brands. The propositions of the study were:

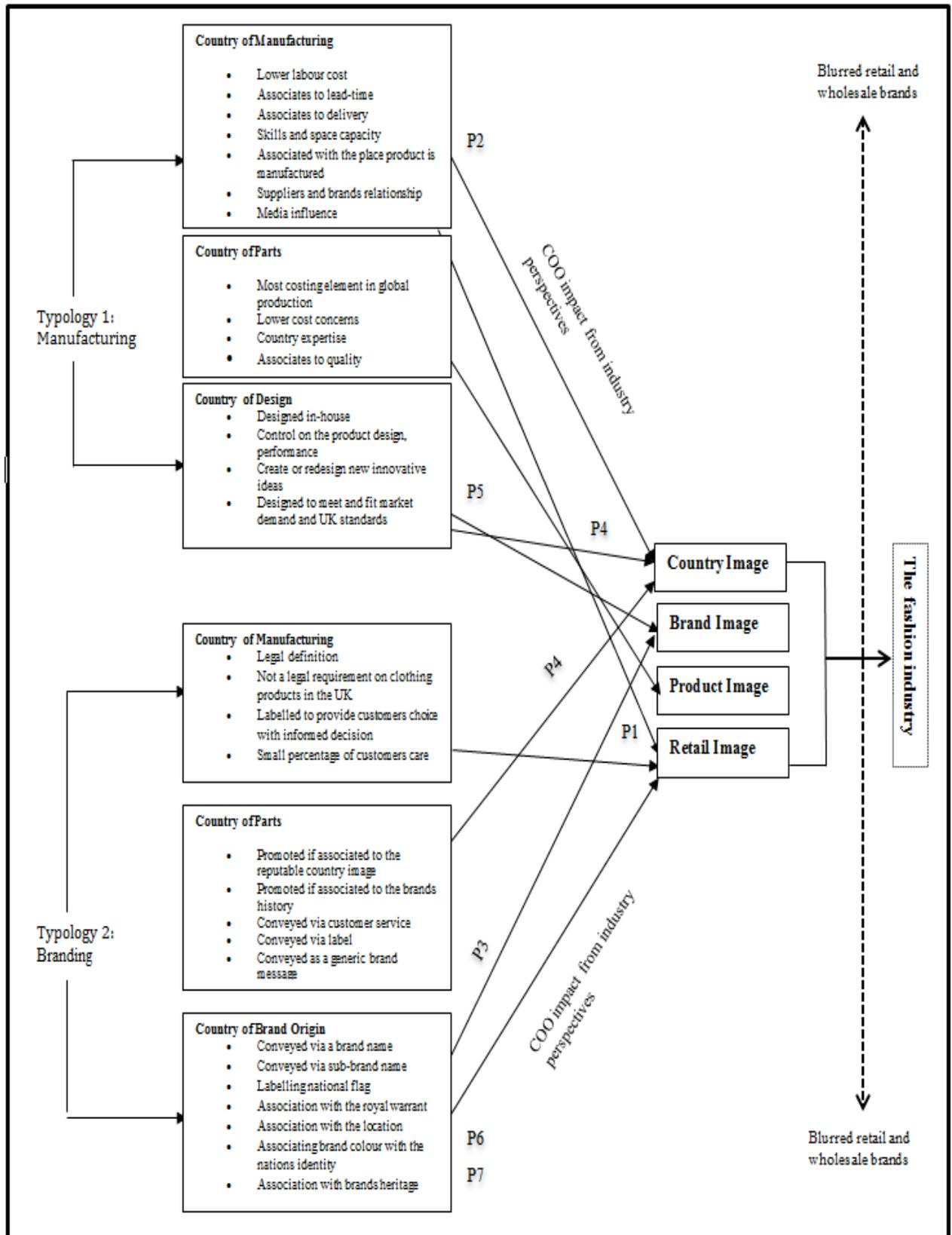
- P.1. Country of origin has a legal definition linked to the place where the product is manufactured.
- P.2. Re-shoring manufacturing will act as a source of brand differentiation.
- P.3. Country of origin is closely linked to heritage and history.
- P.4. Country of origin is closely linked to the perception of a country.
- P.5. Country of origin dimensions affect brand image perception.
- P.6. Country of brand origin can be communicated through a brand name.
- P.7. Country of brand origin can be triggered by other promotional activities.

These propositions are integrated within the theoretical contribution, supported or contrasted with the findings to draw the final conclusion. The chapter is structured highlighting 1) the relevance of the study and 2) its key contribution (figure 8.1), with regards to how the industry perceives the different dimensions of country of origin to be important and uses it as a branding tool, followed by managerial implications and avenues for further research.

8.5. Theoretical Contribution

As the focus of the UK market is limited to the existing literature on country of origin, the qualitative approach of this study contributes to the existing research literature by developing a deeper understanding of the UK fashion industry perspectives and complements the literature based on predominantly quantitative consumer-oriented research (e.g. Insch and McBride, 1998; Chao, 1998; Insch and McBride, 2004; Pecotich and Rosenthal, 2001; Parkvithee and Miranda, 2012). The study also contributes key informants' views and their importance in manufacturing and branding, which will increase as a subject of academic research as it can be transferred to other product categories. In addition to this, as the interviews were conducted within a series of fashion retailers, manufacturers, and textile and fashion consultancies, the study has also contributed new emerging themes that were neglected in the existing literature with reference to how country of origin is considered a strategic business imperative but manifests in a variety of ways, depending on brand positioning, long-term strategic plans, expertise, and brand values. The themes are put together in a form of typology (see figure 8.1) which is the key contribution of the study, illustrating how different COO components (i.e. country of origin, country of design, country of parts and country of brand origin) impact product image, brand image, country image and retail image in the UK fashion industry, encompassing both manufacturing and branding.

Figure 8.1: Typology of the strategic action regarding the use of various dimensions of country of origin components



The country of origin components were divided into two categories manufacturing and branding (see figure 8.1) because some components, such as country of design, country of parts and country of manufacturing, are considered important in the manufacturing aspects of the fashion business as they impact the strategic business plan, such as low-cost concerns, quick delivery, short lead time, having control of the product design and performance, and being able to design a product to satisfy UK customers' expectations. On the other hand, elements such as country of parts, country of manufacturing and country of brand origin are often used as a branding strategy, reflecting the brand's value or mission or due to an association with the brand's history and identity. Thus, both manufacturing and branding aspects are important in the context of country of origin as they can have an impact on retail image, brand image, product image and even country image, depending on brand positioning, strategic business plan and expertise; these are summarised in relation to each component below.

8.5.1. Country of Manufacturing (Country of Origin):

The interviews with the key informants of the UK fashion industry contributed towards different aspects of fashion retail and wholesale brands, shedding light on how each COO component is important in manufacturing and branding, depending on a brand's strategic business plan, core brand value, mission and vision. Thus, this section summarizes the understanding of country of origin and its importance with reference to branding and manufacturing.

From a branding perspective, the understanding of country of origin from industry perspectives was consistent with that put forward by Bilkey and Nes (1982) and Han and Terpstra (1988) (see also proposition 1 section 8.4), , who linked it to the place where the last finishing of the product takes place, thereby equating it with the "Made in [...]" epithet. Furthermore, as noted in the findings chapter and illustrated in figure 8.1, labelling COO in the UK fashion industry is not a mandatory requirement, as also confirmed by gov.co.uk (2015). However, if an indication of country of origin is included on labels, it must be accurate.

Furthermore, contrary to some authors (e.g. Han and Terpstra, 1988; Bilkey and Nes, 1982; Hamin, 2006; Insch and McBride, 2004), who suggested that country of origin is deemed

important for consumers for the purpose of assessing the quality of the product, this study has found that country of origin with reference to where the product is manufactured has very little impact either on consumer perceptions on the quality of the product or on their purchasing decisions. Thus, contrasting proposition 2 (cited in section 8.4.), it can be concluded that re-shoring manufacturing may have a little impact, acting as the source of brand differentiation. This is because consumers have accepted that the product is manufactured overseas. However, labelling a product with ‘Made in [...]’ is considered to be a valuable element in the fashion business, which provides customers with the option of making informed purchasing decisions.

Moreover, the study has found that some premium brands that have an association with royalty do consider country of manufacturing to be important, primarily because of the images the media has developed of specific countries over time. Thus, it can be concluded that the importance of country of origin varies depending on country expertise and image, retail image, brand image and association, and where a brand positions itself in the market. As the focus of the UK market is limited to the existing literature on country of origin; this study contributes knowledge from UK fashion industry perspectives.

Moreover, country of manufacture, with respect to strategic and action viewpoints, has become significantly more essential to retailers that are brands in their own right. This is especially in the fast fashion sector, which requires quick responses to changing trends (e.g. Barnes and Lea-Greenwood, 2006). Thus, labour cost, material cost, proximity and fast services are the key considerations and influence the choice of country of manufacture. This corresponds with the existing literature by Li et al. (2000), who established that COO is associated with technology, labour costs, cost of materials, quality, delivery performance, and product cycle time.

With reference to perceived quality, most of the industry perceives products manufactured overseas to be of somewhat better quality than a product manufactured in the UK. This is primarily because of a lack of skills, space and resources in the UK, which makes a significant contribution to the literature of operation management, concerning the implications of re-shoring manufacturing back into the UK. Indeed, the choice of country

of manufacture depends on country expertise and industry experience within the manufacturing country.

The research into this matter has provided new insights, namely that for retailers, country of origin and its inherent value is a driving force behind the move of manufacture for fast fashion. In contrast to the existing literature, whereby the confines of this research within the target market were explored, it was evident that country of origin was not an important criterion in consumer decisions to purchase from specific fashion brands.

In addition, the result also contributes to the knowledge of branding, identifying that the use of international terminology allows retailers and brands to establish a brand image.

8.5.2. Country of Design

This section summarises the key findings with regards to country of design, considering the implications in the manufacturing context. The section particularly highlights the importance of design products in the UK and the impact this has on brand image.

Similar to other authors (Essoussi and Merunka, 2007; Ahmed and d'Astous, 1996; Insch and McBride, 1998), the qualitative interviews with industry experts overtly indicated that country of design is associated with the in-house construction of silhouettes and patterns, which enables the designers to have control over the style and aesthetic features and ensures that the product is designed to British standards. It is also evident that designing in-house enables the designers to add new and innovative ideas, which make the product useful.

Furthermore, the study also contributes to the existing knowledge on country image which is associated with and impacts brand image, indicating that design elements in garment production impact brand image, and thus in-house designing is deemed imperative for both retail brands and wholesale brands. Moreover, although the design element in the garment construction is considered important for all types of fashion brands, for design-led fashion retail brands, design is considered one of the most important factors and is associated with the brand message of providing quality design and/or product utility. For instance, niche brands such as Hobbs, Jigsaw and Joules have developed their brand images through the

craftsmanship design element. Other brands use performance or plus size as a brand message to attract the segmented market, which again links to the product being designed in the UK. Therefore, it can be concluded that although country of design does not require direct marketing such as labelling the product with where the product was designed, the design element of the product can be conveyed through product performance and other marketing activities and thus is considered an important country of origin component which impacts brand image, country image and even product image, add knowledge as to how country of origin impacts a brand image (refer to proposition 5 in section 8.4). Thus, this contributes to the literature on fashion branding, marketing and supply chains.

8.5.3. Country of Parts

This section summarises the key findings with regards to the importance and strategic action concerning country of parts from branding and manufacturing perspectives and draws a conclusion. This concentrates on how a country of parts association is important in branding, linked to the reputation of the country image or expertise, and how country of parts has strong associations with a brand's history.

As previously identified in the literature by Chao (2001) and Ha-Brookshire (2012), qualitative interviews with key informants show that the understanding of country of parts can be split into two meanings: 1) where the fabric is woven and 2) where the fabric comes from. The results indicate that senior respondents the have the main influence on the strategic decision in branding and manufacturing, representatives of fashion companies that have a long history in manufacturing and branding mainly associate country of parts with country of origin, and this goes in hand with proposition 3 (see section 8.4), however, the importance of country of parts differs between different types of fashion retailers, although they cannot be separated into two different categories because both retail and wholesale brands use similar strategies in terms of retailing, marketing and manufacturing. Moreover, the importance and implication of country of parts impacting product image, brand image and country of origin differs depending on brand's history, product and material production and strategic business plan. For instance, some wholesale brands, also regarded as manufacturer brands, were once manufacturers in their own right (Dicken, 2015). Historically, these manufacturers were innovative in terms of both the materials

and/or the production strategies (e.g. Burberry, Musto). Thus, the specific materials or construction processes used today defines their brand heritage, brand identity and brand image.

On the other hand, retailers that were retail brands in the traditional sense (e.g. Davies, 1992) placed a great deal of emphasis on country of parts. This, however, was dependent upon several factors, including the country's status, the source of the part and whether the country had a reputation for producing high quality parts and materials (e.g. Hobbs London, Phase Eight), going in hand with proposition 4. Thus, it can be concluded that retailers that were historically known for using a retail brand strategy are not concerned about the country where the material is sourced, as long as the material is at a lower price. Nevertheless, to promote country of parts, retailers tend to make use of tactics, which involve promoting the product using sale staff (customer service) or displaying the country label, e.g. British Fabric or Harris Tweed, as it is considered a unique selling point. These efforts contribute to how country of parts is considered important and is viewed as a crucial strategic factor in terms of manufacturing and branding.

From a manufacturing perspective, there was an agreement among the key informants of the UK fashion industry in terms of how country of parts is viewed as the most expensive component of the supply chain. Therefore, most fashion retailers source their materials from a range of countries in an effort to keep costs low and increase profit. For example, the study has found that the prices of material in China and Romania are currently similar, and therefore the sourcing of the material largely depends upon the country where the product is being manufactured, and vice versa, if manufacturing is taking place in the Far East. Hence, the fashion industry usually takes into account the material costs and transport costs as well as quality and skills during strategic decision making. Consequently, the general COO on the labels of garments does not represent the whole product.

With reference to branding and assessing the quality of the product, the interviews with key informants found that components such buttons are considered important in terms of branding, and therefore wholesale brands are protective and mainly source these from their own factories. On the hand, country of parts, from the material perspective, is considered the most important factor for all types of retailers and manufacturers, which includes assessing the quality of the product related to the utilitarian factors, including comfort,

endurance, functionality and other quality aspects such as waterproofing. Thus, to conclude, country of parts mainly associates with the quality of the product and brand's heritage history.

Furthermore, the study has found that the association and legality with reference to country of origin varies from one country to another. For example, in the US, country of origin is associated with country of parts. On the other hand, in Europe, especially in the UK, country of origin is associated with the place where the product is manufactured. Thus, to conclude, it was found that when discussing the understanding of country of origin, industry experts mainly associate this with country of parts. However, based on European law, country of origin is associated with place of manufacture. Consequently, this contributes to the literature on supply chain, perceived product image, branding and globalisation.

8.5.4. Country of Brand Origin

This section summarises the key findings with regards to the importance and strategic action concerning country of brand origin from branding perspectives. This concentrates on the importance of heritage and how it is communicated through brand name, label and other promotional tools, integrating proposition 5, 6 and 7 (see section 8.4).

The results of this study in terms of retail as well as wholesale brand viewpoints revealed that a brand's COO is linked to the place from which the brand originated and was developed as well as the founder's country of origin and any family/heritage history relating to the brand. Therefore, it can be concluded that COO is related to emotional values, history and heritage, which as a consequence can impact a brand image (see proposition 5 in section 8.4). Nonetheless, the manner in which a brand's COO is conveyed to customers varies according to a particular company's values, mission and vision. For example, wholesale brands that compete on an international scale promote their branded products using their national logo (e.g. the Union Jack, tagline, and other country name association) to add value and compete on the global market. On the other hand, retailers that are viewed as brands in their own right advertise brand origin in a brand

message by creating a sub-brand name which is associated with its country, location and brand history. For instance, in 2011 River Island introduced a sub-brand under the name 'Chelsea Girl' (Mintel, 2013), targeting the younger market. Another example of a retail brand manifesting brand origin via a sub-brand name is the 'Best of British' collection of M&S. Furthermore, it has also emerged that other elements such as royal warrants, association with iconic figures also act as a source of brand differentiation in their promotional activities, going in hand with proposition 6 and 7. Thus, it can be concluded that both retail and wholesale brands use the COO of a brand as a branding strategy and that it does impact a brand image, although branding strategies differ depending on a brand's expertise, history and positioning as well as the target segmentation and product characteristics. This makes a significant contribution to how country of origin can be used as a branding tool and thus adds knowledge to the literature on fashion branding, marketing and retailing.

To summarise, using an industry approach (as mentioned in chapter 5), this study has developed a typology from the data analysis as the key contribution of the study with regards to the strategic actions concerning the optimum use of the various dimensions of the country of origin concept in the UK fashion industry.

The next part of this conclusion aims to provide a brief discussion and conclusion with regards to the re-examining of retail and wholesale brands, previously proposed by Davies (1992). Although some findings in this section are not entirely new, such as the concept of retail brand strategy and the investment, such as training staff (EY Retail Operation Report, 2013), required to become a retail brand, there is a contribution towards the use of terminology (or not) of retail brands and wholesale brands, industry experts' preferences towards using two different strategies in the evolving retail landscape, and the blurring of retail and wholesale brands, such as marketing activities, management, retail price and product quality; these will be addressed and concluded below.

8.5.4. Retail and wholesale brands

Contrary to the terminologies used by authors in the literature, e.g. private label brands, (Arce-urriza and Cebollada, 2012; Vahie and Paswan, 2006), store brands (Davies, 1992;

Broyles et al., 2011) and retail brands (Burt, 2000; Goworek and McGoldrick, 2015; Kerfoot et al., 2003; Jara and Cliquet, 2012), the findings here indicate that the terminology of retail brands no longer exists in the fashion industry. Consequently, such terminology as high street brands, boutiques and designers of the high street were suggested as brands that were owned by the retailers. However, it is evident from the findings that the fashion industry still uses the term own brands, such as when referring to brands owned by the retailers, and that both wholesale and retail brands are using both types of branding strategy in the fashion industry. For example, in section 7.5 an example was provided indicating how retailers are expanding their business (e.g. Jack Wills, River Island) using a wholesale strategy on pure-play retailers. The key benefit of using wholesale branding strategy on pure-play retailers, especially ASOS and other international e-tailers, is that the retailers can expose their own brand labels internationally and improve their image nationally. In other words, they can use it as a market entry method. However, retailers are also expanding through department stores; for example, TOPSHOP products are sold in Selfridges and other department stores in the UK to receive global recognition. The key benefits of these are that the own brand label is able to develop global recognition and compete in the international market, which can help in improve brand image. Thus, it can be concluded that online retailing is having an increasing impact on the blurred differences.

Furthermore, with reference to the concept of using the retail brand strategy in the UK fashion industry, the findings indicated the importance of selling own brand labels, designed and sold solely in an own retail store, suggesting that this provides more control regarding product merchandise, store design and layout. For instance, retailers have control to display the product as and when they please, perhaps displaying one of the best Sunday sellers at the front of the door.

However, one of the core changes occurring in the fashion industry is the meaning of retail brands, which is no longer exclusively designed and sold in a retail store. Instead, retail brands are using wholesale strategies and vice versa. In this manner, the concept of designing solely for a retail store means that those specific product types are designed for specific stores, which can vary from location to another. For instance, in chapter 7 and with reference to the definition of retail brands, the findings indicated that product assortment and store design and layout varies from one location to another. It is considered that

Liverpool has products that represent a glamorous appeal, whereas Richmond in London is considered to be smart and sophisticated; this will be presented through the products and service offered within a retail brand store.

Likewise, authors (Martenson, 2007; Ailawadi and Keller, 2004; Glynn and Brodie, 2012; Glynn, 2010) have previously shown how retail brands sell wholesale brands in their retail environment in order to generate customer interest, patronage and store loyalty (Martenson, 2007; Ailawadi and Keller, 2004; Glynn and Brodie, 2012; Glynn, 2010). In contrast, it was found that when retail and wholesale brands are using a retail brand strategy, industry experts prefer to only sell their own brand labels as this reflects retail brand performance and thus the retail image. This contributes towards to the structure, concept and definition of the retail branding of the UK fashion industry and the impact the concepts have on retail brand image.

With reference to wholesale branding, again, the findings indicate that a range of terminologies is used in the fashion industry when referring to branded products such as true brands, independent brands, lifestyle brands and so on. Furthermore, some retailers, who could traditionally be categorised as wholesale brands, still use the term ‘manufacturer brands’, primarily because some wholesale brands were also manufacturers in their right. This goes in hand with Dicken (2015), who previously proposed a definition of manufacturer brands, as mentioned in chapter 3, section 3.8.

Moreover, it has also appeared that wholesale brands that were manufacturers in their own right mainly focused on producing outdoor products imbued with premium quality, durability and a brand image, such as Burberry, Henri Lloyd, Barbour, and so on. Additionally, as these brands were historically known for being manufactured in the UK, a quintessential British identity remains an important factor for wholesale brands that are now also retailers in their own right. Furthermore, it also appears that as the British country image is associated with quality in some parts of the world, including Japan and Scandinavia, wholesale brands that have a global recognition are increasingly taking pride in associating their brand image with the British image.

With reference to the use of the terminology wholesale brands, the findings indicate that the term ‘wholesale’ is still utilized within the fashion industry. However, this is mainly

used when explaining the concept of how products are distributed through a range of channels and retail stores. Furthermore, the findings identified a range of benefits associated with using a wholesale branding strategy, such as less responsibility towards investing in staff training (store labour), which as previously mentioned is the largest non-product cost asset of retailing (EY Retail Operation Report, 2013), IT systems and renting the floor space.

Section 8.4.4 presented a brief summary of the definition of retail and wholesale brands, whereby it can be concluded that although the terminologies of retail and wholesale brands are not frequently used in the UK fashion industry, the concept of retail and wholesale brands is still understood and utilised in the fashion industry. Nevertheless, one of the main contributions to the study is how the differences between retail and wholesale brands are blurring, whereby retail and wholesale brands are becoming design-oriented businesses and retailers as well as manufacturers. For example, retailers that could traditionally be categorized as retail brands now have a vertical supply chain in a nearby location to reduce the delivery lead time and to provide swift fashion.

8.6. Managerial Implications

This section aids fashion retailers with managerial recommendations for the development of their own brand identity and the use of country of origin as a branding strategy, based on the findings of this study.

Firstly, in terms of managing a brand, both manufacturers and retailers have clearly indicated the use of country of origin from a labelling context, suggesting that it is not a legal requirement and does not influence the majority of customers in their purchasing behaviour, especially in the UK. However, the use of labelling can help to improve the brand image as it illustrates that the brand is ethically manufacturing the product as per UK standards. Likewise, retailers have also suggested that labelling a product is more imperative if the brand is consistently flagging up the nationality of the brand.

With reference to branding, it is evident that retailers use sub-brands as a strategy to promote the nationality of the brand to the customers, providing an association with the brand's identity. However, based on the findings of this study, retailers, even from other

categories and areas, can perhaps promote the material associated with the industrialised countries, especially those known for their expertise. To increase the brand image, COP can particularly be promoted by displaying the label or via verbal interaction.

Furthermore, the study has found that for some fashion brands the ‘English association’ is the driver of the brand. However, it is also considered an effective marketing tool when forming a brand identity and recognition in an international market because London is the capital of fashion, particularly popular for its high street range, and also because the English image is associated with quality and, therefore, British sells internationally.

In addition to this, the managerial contribution for the development of retail brand and wholesale brands has been summarised below in table 8.1.

Table 8.1: Managerial contribution for the development of retail and wholesale brands

Themes	Managerial contribution
Wholesale brands developing retail/own brand identity	<ul style="list-style-type: none"> • The study clearly shows how different types of fashion brands are currently implementing retail brand strategy (own brand identity) into their business. • The development of retail brand strategy involves branding the product merchandise under the same name as the retailer, but also branding the store atmosphere, layout and the customer service. • The strategy can be useful for fashion brands that have an ownership on the product merchandise; however, with having a range of own brands, distributed in different channels and stores, targeting different market, the core identity of the brands can become obscure. • For instance, with regard to a catalogue retailer, the younger consumers may be associated with the sub-brand targeted at a younger market, whereas, the older market may aware of the sub-brands targeted at that age group. However, there may be a lack of awareness of the own brands identity, due to the focus of different sub-brands in different channels and stores (e.g. JD Williams).
Retail brands developing as wholesale brands	<ul style="list-style-type: none"> • The study has clearly indicated how fashion retail brands are wholesaling through international online retailers to expose the brand internationally. • This strategy may help the brands that are currently well established in the UK but are not exposed to the international market. • The purpose of using online retailers such as ASOS, in particular, is suggested, because it is well established internationally, and if a brand sells well in one particular country, this shows that the brands have potential to increase the profit by expanding internationally and competing internationally, and thus, contributes to in brand management and development, for brands that still in the process of developing an international recognition.

8.7. Limitations

This study has made several contributions regarding the understanding of country of origin from the perspective of fashion wholesale and retail brand strategies that were previously limited to the UK market. Nevertheless, the study has identified several challenges and limitations in doing this research. The findings can only be generalised according to the size of the sample. For instance, the process of identifying the industry experts was deemed to be difficult as fashion companies provide a limited database on the Internet detailing the experts involved in the industry. Secondly, the process of recruiting industry experts was also considered challenging as it took about 12 months to gather the empirical data. Furthermore, there were also issues with member checking, as mentioned in the methodology, chapter 5, whereby respondents were contacted again, with an attachment of the transcript summary, in the hope that respondents would confirm that the transcripts were accurate. However, in most cases, the respondents had changed career or did not reply for their own reasons, and thus member checking was dismissed as a method of validating the research, and instead the person triangulation approach was employed, whereby the accuracy was confirmed by respondents from different levels of expertise and knowledge and organisations. Finally, one or two interviews did not provide sufficient information regarding the research question due to their last-minute agreement to be interviewed. However, if more time was offered, another 4 or 5 interviews with textile consultancies such as PwC or Deloitte could contribute towards further strengthening the research.

8.8. Avenues for Further Research

First of all, based on the findings, it is confirmed that fashion brands cannot be split into the categories of retail and wholesale brands as the differences have become blurred. However, retailers can be categorised into an individual segmentation, affiliated with a brand or company's expertise or identity.

Furthermore, the literature previously identified how country of origin can be split into several different dimensions, and this study found that each component impacts retail image, product image or country image, depending on brand expertise, brand positioning

and strategic long-term plan. This opens up the avenue for future studies; these are listed below.

- The impact of country of origin on corporate heritage branding, with specific reference to history, culture and provenance.
- How country of origin impacts clothing fittings, covering both manufacturing and branding aspects (consumers' perspectives).
- Investigate country of origin (different dimensions) with specific reference to online retailing, covering both industry and consumer perspectives, as country of manufacturing cannot be identified in an e-tail strategy and some issues can also be associated with COP, COD and COB (e.g. colour, design and quality).
- There is also space for further research in considering how luxury brands implement COO in their advertising (heritage, culture, etc.) and this can be examined for different product categories.

With reference to investigating the differences between retail and wholesale brands, this research has opened up new avenues for further research; these are:

- How pure-play retailers are implementing marketing activities, such as pop-up stores (e.g. BOOHOO did a one-month pop-up store at Coachella, California), to not only develop international recognition but also to develop brand positioning, and how COO impacts the businesses when they are conducting temporary marketing activities.

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Appendix 1: Interview Transcripts

Company A1: Wholesale Product Coordinator

INTERVIEWER: Could you firstly tell me your occupation please?

PARTICIPANT: my title is: wholesale product assistant.

INTERVIEWER: OK, and what does the role involve?

PARTICIPANT: We wholesale our brands to ASOS, and other international e-tailers, which is a great part for our company to expand. So, my role basically involves coordinating all the products that are shown to the wholesale clients, e.g. ASOS and other e-tailers, and then I create the order and allocate the stock to them. So this is what we do as part of our wholesale role. This is very new and has been going around only for a year.

INTERVIEWER: Can you please tell me a bit more about the coordination process, please?

PARTICIPANT: So, we have a wholesale team coming in every 9 weeks, and we get them to see and select the range as required. But because we are a fast fashion retailer, and have to have a quick turnover, the wholesale visits tend to be quicker as opposed to seasonal products. So, to provide them with choice, we get the rails collected from the floor, which are then presented to the wholesale clients, and, they then select everything as per their needs and requirements, and then we send the orders to the suppliers and they send it back.

INTERVIEWER: You mentioned about other international e-tailers?

PARTICIPANT: Yes, Nelly is Swedish. 'The Iconic' is Australian. Zalando is German, and Zalora is Singaporean / Malaysia. So there are quite a lot of international e-tailers that we are doing business with, and it's growing even more. We are even considering launching Nelly.uk, which has not been confirmed and announced yet.

INTERVIEWER: and what is the purpose, or benefits you are achieving from this wholesale expansion?

PARTICIPANT: it's to test the market. So like nelly is a Swedish one, and thereafter, we have now opened the store there. It's really just to get the brand working in an international market. We have had some really good outcomes, like we have recently launched a store in Australia as well, and that is one of the main areas we are focusing towards. So we are trying to go down that route, and so far, it has been really good and successful. So it's all just a learning process of a brand trying to work as a wholesale business, which is very new and exciting.

INTERVIEWER: so you have mentioned about your brand introducing wholesale strategy, would you say your brand is making a shift or if the focus still on the own retail side of the business?

PARTICIPANT: I wouldn't say we are trying to shift, as we are just experimenting by expanding the e-commerce side, using wholesale as a strategy, but the main focus stills very much remains on the high street and on the own stores as well.

INTERVIEWER: and do you sell any others brands within your own brands?

PARTICIPANT: Yes, we sell Jack Jones within our menswear department. We do sell quite a few other brands, but I don't quite remember their names; they should all be on our website.

INTERVIEWER: and would you say they are manufacturer brands or retail brands? The terminology 'manufacturer brands' had to be rephrased as wholesale brands, as the participant did not have significant knowledge about the difference between retail and wholesale brands.

PARTICIPANT: I would say they are wholesale brands, the ones we do.

INTERVIEWER: so would you be able to tell me the difference and benefits of operating as a wholesale business, but also selling other brands within your retail?

PARTICIPANT: it basically enables us to generate more profit, as we work with wholesales on a specific profit margin. So wholesale side of the business is more about getting and making people aware of what our brand is about, but also trying to have as much control as we can.

INTERVIEWER: and how does selling other brands in your retail store impacts your brand?

PARTICIPANT: I think it attracts consumer in a sense that they are still coming into our store, which benefits us and the other brands we are selling. So consumers might come into the store specially to see Jack Jones product, and then they might find something of ours that they end up liking as well. So it's like we are partners, trying to help them as much as they are trying to help us out. It's also trying to reach other market, trying to bring more people in. It's using brands retail store as a promotional tool, so basically we will buy in other brands that we think will fit in with river.

INTERVIEWER: Ok, and could you please tell me what do you understand by the term 'country of origin'?

PARTICIPANT: It's where the products are made. We have all type of suppliers, as we have a range of short lead-time, and products that are manufactured with longer lead-time. So it varies in different departments.

INTERVIEWER: Ok, and could you tell me how does this influence your business, as in, how is it considered important to your business??

PARTICIPANT: Because we provide fast fashion. Well, where our products are made, heavily influences our business in terms of when things are delivered and who we work with. So we have a home production facility, which means that some products are made here. Now the benefit is that we are able to work really close to suppliers and have things made for us in two to three weeks. So, we have production facility in the UK, but we have also connection with suppliers in Turkey, that can also provide quick turnaround. The country of origin of products that are made in China tends to come in one drop and with a longer lead-time. Whereas, you can have shorter lead-time, if the production is in the UK, which affects your delivery, quantity and things like that.

INTERVIEWER: You have talked about home production, which element of production is taking place in the UK?

PARTICIPANT: so we buy in the cloth and then they assemble the product here in the UK.

INTERVIEWER: so where would you say the fibre or the fabric is from?

PARTICIPANT: I am not sure, but I think it's from another country.

INTERVIEWER: and would you say it's designed here?

PARTICIPANT: yes, it is designed here.

INTERVIEWER: so when looking at the 'Made in' would you it's implies the last assembling or other constructs

PARTICIPANT: I would say it's the last assembling.

INTERVIEWER: so how do you think this influences business?

PARTICIPANT: I guess we have more control on the production, product and quantity

INTERVIEWER: and what is consumer's reaction towards products made in the UK?

PARTICIPANT: I don't actually know whether we make our consumers aware of the home production, but I think if we did, like Topshop does the whole 'Made in Britain', it would have some positive affect. People say, you should buy home production products, because you know that it does not involve sweatshops, cheap labour, but I don't know how else it would affect consumer, although I think it should be positive.

INTERVIEWER: and what about the brands origin?

PARTICIPANT: So, our brand is a British heritage brand, family run business and has been, all this time. It's a private business. The handwriting of 'brand name/logo' represents the British high street fashion, which is what the brand is about.

INTERVIEWER: and, could you think of other ways through which your company emphasis on the heritage?

PARTICIPANT: Our brand naturally reflects the British high street through the logo, and well, its overall indication, I mean people know already that we are a leading British high street retailer.

INTERVIEWER: Which dimension of country of origin would you say is most credible? Is it the parts, design or manufacturing?

PARTICIPANT: I would say commercially to the public, the business should use the country of origin as Britain, and about how we do things in-house and reflect the British high-street, which is very important. But I think in the retail industry, I think COO in terms of where products are made is way more important and effects more things. I understand what you mean so like Zara and mangos are recognized as being Spanish. It is important that it is communicated well enough, that our brand is British. But I don't think our company focuses too much on that, and don't think it will in near future either.

INTERVIEWER: so what about the impact of country of origin, when wholesaling via international online retailers, as you previously mentioned about Nelly, and Zalando, etc.

PARTICIPANT: I think internationally people would buy our brand more because it's British and has an idea of high-street British fashion, which is even more popular through the London Fashion Week. So the customers may buy our brand instead of ZARA because they are familiar with known high street brands, but also because we are British, as have association with the capital of fashion, London.

INTERVIEWER: So you mentioned about how in the retail industry, COO in terms of manufacturing may be more significant, could you please tell me why is that?

PARTICIPANT: I have to deal with suppliers, which then affects the lead-time. So when I tell the wholesale that the product is coming in this week, and then the supplier says well it's not, that affects me and the business, which can then have an impact on the order, can lead to order cancelation and that is why, I would say, 'Made in' would be impact me more. So how good they are in making a product, or how good they are in emailing and communication varies from suppliers to suppliers.

INTERVIEWER: How important do you think is the relationship between a brand and in country of origin in general term.

PARTICIPANT: so we have two things going on, one is that our brand is from Britain and the other is that our brand works with suppliers. So the relationship between (Company A) and the country of origin of supplier is massively important because if we don't have a good relationship with them, then this can impact the delivery week, too less or too much stock. We want them to do business with us. Coo in terms of wholesale is massively important in my role, we have to maintain relationship with all these countries, to promote and maintain with carrying on doing business with them. In terms of our brand as a British brand, we will always be known as a British owned family brand, which is naturally embedded in us, and will never change. And then we have our design team / home production in the UK, which is very important to us as well.

INTERVIEWER: so why is the British heritage embedded in the brand so important to the Company?

PARTICIPANT: Because where a Company is from, massively affects the customer you are targeting, what trend you run, massively effects where you can do your business.

INTERVIEWER: So what do you think is a relationship between retail brand and its branded products?

PARTICIPANT: Again, we have an international team, and a brand team that deals with all the brands. i mean the department, for example, ladies department wouldn't control the brands they buy, its like a separate department. So obviously,

they would know how they deal with the brands, and how they work with this. I am not too sure; I don't know is my answer.

INTERVIEWER: No worries. So what are the differences between a brand and product in (Company A)?

PARTICIPANT: (Company A) is a brand that sells products, but does not sell products apart from fashion.

INTERVIEWER: and what are the general differences, from consumer perspective?

PARTICIPANT: Some people buy into the brand purely because they like the look, price, style, or the location of the brand, or the models that brand uses. Whereas, a product is a necessity, so like people would purchase a jean, because they need it. So it's mainly all about the brand.

INTERVIEWER: Do you carry out research on perception?

PARTICIPANT: In terms of customers and market research, yes, we have a marketing team, and with the growth of ecommerce we now have a web-team that does research on how our customers buy online. We have people going in, analysing the stores, and all the sales and stuff. Our main consumers are 18-35, high fashion but mass market.

INTERVIEWER: so you have previously mentioned about wholesaling with international market; can you think of other ways through which country of origin is perhaps emphasized or promoted within your brand? E.g. celebrity endorsement, store layout, music, brand message or anything else?

PARTICIPANT: well we have Rihanna and the collection. So that is an international model we used. We do the design range with British upcoming designers as well. So I guess that is the way we promote ourselves as British. So Joseph turkey is the one we worked with. So it's called like a design forum, and we promote the ranges through that. So I guess that is one way.

INTERVIEWER: Do you have catalogue service as well?

PARTICIPANT: We don't have a catalogue, but we have style insider, which is a magazine in-stores, and we have a click and collect service as well.

INTERVIEWER: so is there anything on the brands website that emphasize the British Heritage?

PARTICIPANT: Emm, not that I know off, not to my knowledge.

INTERVIEWER: so in terms of brand message, how important do you think is country of origin to your business?

PARTICIPANT: Personally I don't think it's one of the focuses, what we get across is that we are a British high street brand, and we follow the trend and get that off. But I don't think it is something a brand is focusing too much on, I think...

INTERVIEWER: and do you think British association with wholesaling internationally is important?

PARTICIPANT: Internationally it would be important that we communicate what we want to communicate. That if they want to influence heavily that we are a British brand, and then if they wish to shop, I think (COMPANY A)'s presence in England is already out there, whereas, internationally we are building that up a lot. So in that case internationally is very important.

Company A2: Footwear Buyer

INTERVIEWER: Could you please tell me your role?

PARTICIPANT: so my role is, Ladies footwear buyer.

INTERVIEWER: and how long have you been in the company?

PARTICIPANT: It's been about 6 years.

INTERVIEWER: Can you please provide me a bit more detail with regards to your role?

PARTICIPANT: I build and buy a range for footwear. I work closely with designers, merchandiser, that trades the range and season. This involves negotiating cost prices, and deciding where we are booking things, working closely with my suppliers. There is a lot of work involved in this, basically.

INTERVIEWER: so would you say your company is a retail brand?

PARTICIPANT: we don't use that terminology like that, it's interesting. We just class it as high-street brands. We would like to be seen as the designers of the high street.

INTERVIEWER: and where are your brands mostly sold?

PARTICIPANT: we have got 270 stores in the UK; we franchise stores internationally, joint venture stores internationally. Our websites is global, and we don't sell our brand within any other stores apart from our own. The only thing we do wholesale is via online. So we work with retailers including ASOS, Nelly, Zalora, Zalando, all the iconic brands, but they are all online retailers.

INTERVIEWER: and do you intend to sell your own brand labels within department store as well, and what impact would country of origin have?

PARTICIPANT: this is not something own company would talk to us, at this point. On a department level, we would be told on the spot that we are now working with wholesale brands, or we are now working with..... The only time it would impact me is when, if the store is located in South Africa or in another country. So, I would need to know the account season range, because the climate is different there. So they are the kind of things that impact me from a buying point of view. Whereas, if we were to distribute more into other stores, then it would impact the buying teams, in terms of do we need to buy more for additional stores?

INTERVIEWER: so when you talked about nelly, I believe this is a Swedish brand? so is this available in UK?

PARTICIPANT: I think you can buy it in UK, but like Zalando, The iconic are eastern European, and one of them is French I think.

INTERVIEWER: So when collaborating with online retailers, how does this benefit the company?

PARTICIPANT: It's the exposure, which is the most important thing. So when the company is looking for an international expansion, you need to learn as much as you can about those markets, especially when you are not already established in the market, which is a fantastic exposure opportunity.

INTERVIEWER: So how do collaborate with international market?

PARTICIPANT: so for example with wholesale brands, you will get the sales team to see what they are exactly buying, we would then adapt our buys to make sure, for example if we are selling in Philippines, the size cut in Philippines is tiny, so you basically learn by your market through that. We have international team, who focus purely on own-stores, and they do trips to check the market. We would go see the market to ensure that it's the right place

for us to place our brand, is it a type of place where there is opportunity, or is it just a cloak up with people doing the same thing. So they are the most important features.

INTERVIEWER: Would you say it's like a marketing platform?

PARTICIPANT: Not really with that type of wholesale brands, that is not the right marketing platform for us. We are focused on marketing, but that is more directly through our own stores and word of mouth.

INTERVIEWER: Ok, and now, could you please tell me what does country of origin mean to you?

PARTICIPANT: So where "its made" where it is manufactured.

INTERVIEWER: Ok, could you please tell me what does country of origin means in relation to (company a) brand and its products?

PARTICIPANT: I don't think there is any relationship. I mean the origin of the brand is British- that is a setting stone, the design – we are like 80% in-house design, which is the main origin of the garment that is the origin of all of our products.

INTERVIEWER: Could you please explain the process of in-house designing?

PARTICIPANT: I mean, we have a massive design team and we design everything here. The country of origin is, with reference to where we manufacture is down to the best suppliers, to make sure that the product is right. So, if it is right to make it in Britain, and the opportunity is here, and it's right in terms of business point of view, in terms of price and quality, then its great, it can go hand in hand. For products like footwear, which I buy for, there aren't any opportunities in UK, like there used to be. For the kind of prices we have, it's just not achievable for us to have it made in UK. But for clothing, they might have the opportunity, and so, it would be better if you could get through the clothing buyer. Also, we have accessories and knitted factories, which has a quick turnover, and the cost of transport is nothing, and even the stock comes in less bulk, whereas, for me, I am waiting 6 weeks from door to door, especially from china to UK. So we work all over the world, like China, Vietnamese, India, Brazil, Portugal, Italy, and Romania.

INTERVIEWER: and doesn't think impact the lead time?

PARTICIPANT: We all, as a high street brand, have most of the production done in China, and this is due to a number of reasons and things, such as cost of material, capability, cost of labour, and China is a perfect market for the price point we are looking at. However, where the recession has been difficult, a lot of retailers have been looking to come back to the UK or to near-by locations, to be able to reduce the lead-time, and get the products quicker to the store. Which we also do, and but we have had a little bit more on our feet, so using Italy, Romania and Spain, which has a slightly longer lead-time, but it allows us to work with them. So for us, we have to have a range, which has to be balanced for us to say that this has the initial hits/selling within the trading season.

INTERVIEWER: Which dimension of Coo is more credible in your opinion: COP, COD, COB and COO?

PARTICIPANT: It's the 'made in', which is more direct to customers, because I have shoes that are made in China, but the leather is Argentinian or Brazilian, whereas, the technicians out there are Italian, so different elements are going to the product from different countries. By saying made in, it's made in China, but as retailers any messages we want translated back to the customers is done through our store staff. So it's making our store staff aware about the product and other countries involved in making the product, which can be a great selling point. It's a bit of snobbery saying it's made in China, so our girls and boys (sale staff) are saying to customers, 'oh this is lovely Brazilian leather'.

INTERVIEWER: Importance of COO...

PARTICIPANT: Sometimes it's a good selling point, because if consumers know about the Brazilian leather, they would immediately know it's great quality leather. The general consumer perception is that Chinese products can be

subtended, but that is not the case, you can still get leather from China, but I would say they are not the best, as the best ones are Italian and Brazilian.

INTERVIEWER: So would you say the image of the country has an impact on the brand?

PARTICIPANT: Yes, so if you look at the designers, and if you saw made in china, you would be quite surprised, because you would expect it to say made in Italy or Spain. But that is quite an old or ingrained perception in many consumers.

INTERVIEWER: So, how important do you think is the relationship between country of origin and brand?

PARTICIPANT: I think it is important for any retailer, in a sense that you know where you are producing and the implication of that, and we also have a responsibility that if we are working with suppliers in Vietnam or whatever, you have to think they are getting x amount of business, that has that much impact on their business, in which we are supporting their economy, through what we do, so we have the reasonability, that we always have to think that right from the business need that are still satisfying, so we should keep the business there, because it's important for them, so for any retailer, they always think that, but with fashion business, things tend to change very quickly, so you have to be very adaptable to think that, so in long term, if there is something going on in Italy, it's a hot trend, we are getting from there, but the trend might be dying off, in which case, we need to have a conversation on where they are going to have anything else, so the responsibility of communicating is both ways.

INTERVIEWER: How important would you say is the relationship between a brand and its products?

PARTICIPANT: It invaluable, it's the most important thing, you are as good as your products are. The quality issue can ruin your image, especially if its consistence quality issues, so you can't survive without thinking this are invaluable in any context.

INTERVIEWER: So basically, your quality issues can have a huge impact on brand image?

PARTICIPANT: Absolutely, any issues, even like fit issue, or change in fit can alienate your customers, by them trying on a size 10, and then a size 10 product not fitting them, could make them think that sizing is ridiculous in our brand, so I am not shopping there anymore. Especially for girls, they can be very sensitive with those kind of issue, even with products like shoes, if I have shoes that come that is a size up, people don't like that, they don't like to go a size up. Even if something on the feet, you can control the size going up. So it is quite important

INTERVIEWER: So what you say does your company brand name, says about the brand, or what would you say is a brand message?

PARTICIPANT: As a brand, we are very dedicated and have a full team that focuses on branding. So that we go from branding on the buttons, to the jeans, constantly pushing the brand. We want people to know that they are wearing river-island, and they are proud of it. Our handbags are always adorned with our own branding river-island. So people see us as a brand.

INTERVIEWER: So you know how you mentioned about differences in retail

PARTICIPANT: So like there are elements of us as a high-street retailer, but people see us as a brand and for this, handbags are a good example. As for the connotation of the name: I don't think it is particularly deep rooted, I mean it didn't start like the name we have now, but as a brand message, we would like to think we are the designers of the high street. We have a boutique element to our stores, we want our shoppers to have an experience when they visit our store, and that is what we pride in. We really focus on all of the branding, the lights, store, fixture, visual merchandising, music, it's all an experience want our customers to enjoy, and that's the draw to come to the store. Its not just about selling a t-shire, everyone sells t-shirt. It's about what is our USP.

INTERVIEWER: so when you have talked about the experience you provide in store, is the kept the same in each store?

PARTICIPANT: Yeah, I mean there is different grade of stores that is down to location, signs, all stores- we look at each grade, in terms of product, in terms of layout, although you will find the same kind of music in each store. But the actual layout and visual merchandising will be different for each customer profile. So for instance, Liverpool Is very glam always is very glam. So what you see will on the window there is very focus on going out, good time and fun, whereas, somewhere like Richmond, it's actually a little bit smarter, sophisticated a bit like yummy mummy, so you might see a little bit riding boots, and blazer, but the overall brand message is the same, but it's just adapted to right for those different locations.

INTERVIEWER: What kind of consumers profile are you targeting, or your brand is focusing at?

PARTICIPANT: We have a huge age range. Well most brands/companies would say like 16 to 25, but our customers go up to 60 and 70. We don't like alienating anyone. We would like to think there is something for everyone. But major target market is 16 to 30, under 25 market is probably what we associate ourselves with most, and when you go in our stores, you can generally see that.

INTERVIEWER: so do you see yourself associating to the origin of the brand when collaborating with international market?

PARTICIPANT: No, we won't emphasise too much on the British association, because we are trying to target the international market, and we don't want to provide the image that we are only available in Britain. We want them to think that we are available for them, but we do have in-house brands that do a job of promoting the British Heritage, like Holloway road, which is our men's collection. This men's wear collection is associated with the founder of the brand, which is a nice way of telling about our roots, instead of shouting about it all the time. We are very lucky that people already know us as a British brand, people know that we started our brand as a [...] girl, which then developed, but we still have [...] girl sub-range, which is nice again because it reinforces how the brand has evolved. This is a nice way of bringing old customers back in the store, that would then be like 'Oh, I remember [...] girl', and then getting their kids to to associate with the brand, that was once worn by parents. [...] girl prints are quite retro. They try to use quite a lot of their original prints. All the [...] girl prints are in-designed, by our own print designer. So that kind goes back to saying that ok it's made there, but even the prints are designed by us.

INTERVIEWER: Do you not promote that to consumers?

PARTICIPANT: From a clothing point of view, I think it's much trickier to do that, as you don't have interaction with sale assistant, as you do in footwear, where you have to go and ask someone to go and get you the shoes. You have that one on one time to talk about things in footwear. Within clothing, most of the time you are getting things yourself, trying it on and etc. So I don't think that is something you could do when selling clothes and I also think this is something we kind of hope people know about our brand, which is basically unique. Often when we get market research and stuff, or even if we do focus groups, the feedback we get from the customer is, that "we can get something different from (COMPANY A), and whether that is, I mean I don't think they realize why we are different, but that is part of us as a brand, to do something ourselves, rather than relying on different markets, whether its trim, embellished, or materials. But then that is something you will see diluted in the market, with someone else doing that.

INTERVIEWER: So can think of other ways, in which your brand associates with its British-heritage?

PARTICIPANT: Music is more popular culture based; it has to relate to the brand image. You could not go in the store and hear classical music, because that is not what our brand is about. So there would never be a focus on British music, because it's popular culture, we want our customers to have the experience they want, which is probably Rihanna or something. I think you never really push in store, that the brand is British, except for [...] girls, and [...] road and elements like that. Apart from our sub-brands, you will not see much push, but since British fashion high street is generally very different to anywhere else in the world, we naturally develop that British recognition. Then there are also elements like, British high street is very very fast, we move our colour, shapes, trends very fast within weeks. In country like Australia, American these things don't happen.

INTERVIEWER: So are you looking to expand in these countries?

PARTICIPANT: we are always looking to expand, always looking for opportunities in other market.

INTERVIEWER: So how is this collaboration with international market going?

PARTICIPANT: We have been international for past 15 years. The first international store was established in Singapore I think. So we are quite well established in certain market, like Middle East and so. More so, in some countries they see our brand as British brand, and that is part of the attraction, because they know England is so fast, British fashion is so fast – so that is the store they want to associate with, because they know that store would be fast with fashion.

INTERVIEWER: So do you think internationally, consumers abroad want to associate to the brand, because it has the British heritage to it?

PARTICIPANT: Well yeah, because British fashion is associated to London, which is a world one of the fashion capital. So for consumers, who don't live in the UK would associate to it more because of its brand associates to London. But within UK, we don't realize how good we have got it, but everyone is trying to push the boundaries.

INTERVIEWER: So, is there any way you promote the concept of “Made in” within your garment?

PARTICIPANT: We have “made in Britain” online on certain garment, we did have tags with “made in” at some point as well, as this was the hot topic last year. I don't know whether it has had any increasing impact on the sale, in any context, but it was an interesting thing do, because some people liked the idea of “ok its made here”, nice! But the connotation was, helping the British economy in the tough time probably.

INTERVIEWER: So how do you think the brand messages impact the business?

PARTICIPANT: Well everything we have talked about is important to the business, including the makeup of the brand from where the product is made to the store experience. The messages you give people, this is all part of the brand. We as a brand have to fit everything in a correct order to have the brand image.

Company A3: Denim Buyer

INTERVIEWER: Could you please tell me your job role..?

PARTICIPANT: Buyer

INTERVIEWER: What product category?

PARTICIPANT: Denim, ladies Denim

INTERVIEWER: Length of employment?

PARTICIPANT: 3 years

INTERVIEWER: Could you please tell me a bit more about your role?

PARTICIPANT: The buyer of the department buys the core products. So what we buy goes in the UK stores, but we also buy the international package and the wholesale package. So my main job is to get denim into the stores. So we buy a package for the UK, which is obviously our biggest kind of market at the moment. And I work closely with my designers; from actually looking at the chains, to say which ones are going back, deciding the individual style so that we can make it cost effective. So there is certain kind of criteria we have for sourcing the fabric, buying the fabric, then actually deciding the washes, and the level of detail on each garment needs. And then with the merchandiser, we make sure that we can do that to the number of options we have, to the cash and what we can spend. And then my team and the garment teams try fitting them, fitting the different styles and making sure that we get the best product in the market. So I am also very much involved in the visual merchandising side of it, so once we have booked the product, it's signed off and then send to the manufacture for making it. Then we also think of where do we want to set it in the shop, what we wanted to look like, where to we want to sit it. So it's kind of like a full package, right through the national planning all the way through the stores. So we look at denim almost like its own brand within the company. So that's why I am much more involved in different aspects of all wear, so if you were a buyer in another department, you may not be involved in the visual merchandising side.

INTERVIEWER: So when you say own-brand, is this just (Company A)?

PARTICIPANT: Yes, it's all (Company A). On denim we don't buy any other brands. So all the denims products are (COMPANY A) designed in-house, and sourced in-house product.

INTERVIEWER: so you have just mentioned about how denim is designed in-house, and sourced in house, so is this manufactured in house as well?

PARTICIPANT: So we work in partners with different country, prominently turkey. So we would work with factories there, or manufacturer there. We would give them the design, we would also then be showing them what fabric we like, they will then buy it and together they will manufacturer the garment for us.

INTERVIEWER: So which country is the biggest for you, in terms of denim production...?

PARTICIPANT: So turkey is the biggest country for me, followed by Pakistan, then Bangladesh. And that is very different versus other people on the high street for denim, and it's also very different to menswear department here. So we have a very different sourcing base.

INTERVIEWER: So you have recently just mentioned about different sourcing base, is this to do with sourcing material / fabric...?

PARTICIPANT: Again, that would be turkey if follows the pattern. So if I were buying a fabric from turkey, then I would get manufactured there as well. It's not very often that I would buy fabric from Pakistan or Bangladesh and move it to turkey to manufacture it.

INTERVIEWER: So, you have not got any in-house manufacturing or sourcing...?

PARTICIPANT: No, the (company a) as a company does a lot of fabric buying, sourcing and then we have our factories, we have our massive home production team here, but then that is mainly used by the soft department, so like Jerseys and blouses. So it's like woven tops, blouses, dresses and soft jackets, that is prominently the area we HPT for. (home production team).

INTERVIEWER: So when you talk about HPT, is this related to assembling or designing or something else?

PARTICIPANT: Its kind of right from the beginning to the end, so fabric sourcing and fabric bought by our brand. So it's an actual fabric team that buys the cloth. Then you have our team here that runs the factories, so the patterns are done her for which we have a whole pattern department. The prints and the effects are done here as well. The pattern team would basically come here and amend the patterns. We then send the pattern along with the fabric to our factory. And the factory just manufacturers, but those factories are run and owned by us.

INTERVIEWER: So when you talk about fabric bought for in-house production, is this from another country..?

PARTICIPANT: ..Some of it depends on the product category. And it depends what the garment it is. Some of the jersey comes from UK, the woven fabric; especially the prints, and threads would come especially from Italy. And then a lot of wool and a lot of stuff you use for cotton would again also come from Italy. But if it is latex, it might come from China, but tha just depends on the product category and the fabric type.

INTERVIEWER: and in terms of your company as a brand, could you perhaps talk a bit about that?

PARTICIPANT: our company kind of sees them as a boutique in the high street. So they are defiantly a high-street retailer, but what we are trying to do is offer something a little bit different, as compare to our competitors. Obviously, it provides mass produced garments, but what we are trying to do is giving something a little bit different and special, which is very apparent and has come from our store, rather than just being generic for my jeans. So we spend a lot of time and effort on our branding, so it will only be these little things like embellishment and etc, that would just show how much time, and care has gone in to the style and the though process.

INTERVIEWER: So you have just touched upon how your brand differentiates from the competitors. Can you talk a little bit about that please?

PARTICIPANT: I would say through the attention to detail. I would say it's kind of like the whole package, so (company a) has always been known for selling things like labels. Do you know what I mean, like the labels are very distinctive to (company a), like the carrier bags? As well as a being a boutique on high street is quite fun. We don't take ourselves too seriously. It's all about fashion and we love it and its passion, and I think that comes across. Then the store layout, the store staff and the windows, it's all about tom and chic marketing.). So it's like we don't take the sales too seriously. And then on the other side, there is this huge British heritage, being owned by the [...] Family. So it's quite a family business, and we keep ourselves to ourselves. Because we are private owned company, we don't talk too much to the media and all. Giving our saggars or sales, we are kind of just going with it.

INTERVIEWER: So you have just touched upon the association with British Heritage, so is this within the particular area.

PARTICIPANT: we probably see it more with [...] girl, the sub brand, because that is how the brand actually started. so still having [...] girl brand under our brand umbrella, and then the same on the menswear, we have a brand called [...]. So again, that is the heritage brand. The [H. Road] store was the first store that was opened by [...], when the company started. so it was [...] girl on the [H] road. so it's the [...] family that started the company, and that is what is really nice about it even today, that [...] family is still very involved in the business today. b[...] has recently just stepped down as a CEO, but his son now is the managing director of the company, and his wife still plays a very big part in the business, and so does their son. so it is still a very big family business oriented.

INTERVIEWER: So how would you say the brand emphasizes its heritage through [...] girl and [H.] road?

PARTICIPANT: Like they are original, and those names are still being used. [...] girl, the label is seen as like the younger end of (company a). It's a bit more price conscious, and they do a lot of vintage inspired things. So again, trying to look back at what we had product wise, back on those days, and what can take it from there. And then the [H.] Road was purely because that was the first location of the first store. So that's where the [...] road brand came from. So they have done this a bit more like a casual vintage brand, but for menswear.

INTERVIEWER: [...] girl, what about their fabric, is that all manufactured in house or?

PARTICIPANT: Some of it's done in-house. It depends, because they are buying a collection, they are not just buying blouses. So elements of that are done in-house, and then other elements will be outsourced. And again, it's all designed in-house, but they will have different people manufacturing, obviously in different countries, depending on the strength of the country. And so, it's the same for [H.] road.

INTERVIEWER: You have touched on [...] girls and [H.], but does [...] Company A] overall and in general have any association with heritage history..?

PARTICIPANT: Well, I think so. Like I said it's a family business, and our company has been going as (the new name) for, must be like 40 years. So obviously, that is kind reminding people as well. So I would say yes, while the other companies have come and gone, our company has constantly been there.

INTERVIEWER: In terms of British heritage, would you say it is through their history, brand name, logo or any other association?

PARTICIPANT: It is kind of hard to know whether brand name has any association. We have started global expansion, but we are not the leak like M&S are, like they are recognized as British kind of brand, as is Topshop. But I wouldn't say is in that kind of leak, but I would say the history of British high street is very important.

INTERVIEWER: Ok, and very generally, would you describe your brand as a retail or wholesale brands..?

PARTICIPANT: Retail Brand.

INTERVIEWER: and can you please explain a bit more detailed?

PARTICIPANT: Because we are a retailer. We are prominently a retail brand that manufacturer, I wouldn't say we are the manufacturer that does retail. The retail is the prominent part of the business.

INTERVIEWER: and would you say that your company main focus is mostly only on retail, or is it expanding more on wholesale?

PARTICIPANT: Well, the wholesale business has become much much bigger even in the last 6 months. In the 6 months, it's grown even more than it had previously. So we are originally just on ASOS, and they are the biggest company we wholesale to. And then more recently we have started to wholesale more to the international market. So there is Jaibong, which is the Indian ASOS type, we wholesale to them. Then there is Zalando, and Nelly, which is one of the Swedish brands, and then there are couple of others that I don't remember the name off. But we wholesale to them all, so they can select the product from our range and we buy quantity for them.

INTERVIEWER: What are the main benefits you receive from wholesaling?

PARTICIPANT: I think that's a fair kind of point because not a lot of other high street retailers want to wholesale their products. But I think it's quite silly not too, because if you are talking about ASOS as an example who have their own online retail, and they are a very good retailer, who have massive expansion in Australia and even China. I mean they are global and their name is recognised globally, and when we first went on their website they hadn't even done Australia or China, so it's prominently the US market somewhere where our brand isn't necessarily recognised. By wholesaling on ASOS, our brand name was recognised on their website, and so when you see people in the US buying products from us then that gives us confidence, that the product is right for that market. So it's kind of a way to get your brand name out without marketing it or opening stores in there.

INTERVIEWER: And do you establish a retail store after wholesaling your products on ASOS..?

PARTICIPANT: Yes, we did pop up a store in the US after that. When we were doing the collaboration with Rihanna, so obviously the collaboration with Rihanna got our brand name out and gets more of a global market. They are also talking about opening a store in Australia, and we have stores all over Europe as well. No, I would say that the feedback they have had from the other wholesale brands has given them the confidence to open stores.

INTERVIEWER: You have previously mentioned that your company doesn't sell any other brands on denim.

PARTICIPANT: For the business, this is only my opinion as a buyer, but I don't see (company a) having someone's else's product in our store, because we don't have space in our shops, and we want to put our own stuff on it. Where I have worked previously, when the brands haven't been able to fill the floor space or say the department hasn't performed well, we have done wholesale buys, and part of the reason is because when you put your product out on the shelf floor, you fill the space, you take the money for what you sell, and you can return the product back to the wholesale, if the product is not sold. So it's a buy and returns thing, not a risk to the business. But we don't do that in (company a) because we have our own collection.

INTERVIEWER: What benefits do you think customers get with the shift between retailing into wholesale?

PARTICIPANT: If it's more of collaboration, it's like working with Rihanna. But if she had been a wholesale brands, it would be using her name and her profile, so like say (company A) wanted to do collaboration with Abercrombie, and it was all about American style, then you would almost piggyback on their back brand identity.

INTERVIEWER: So how would you (company A) is branding the store?

PARTICIPANT: By their individual collections, so when you walk into our store, it's all about our products, but then within that you [...] girl range, and [...] road. So you have many collections, which I think then build's up the brand, because I think people start talking about it. So it's like having many shops within your shop.

INTERVIEWER: What do you understand by the term country of origin?

PARTICIPANT: Where the actual garment is manufactured.

INTERVIEWER: And why does it mean that to you?

PARTICIPANT: Because it's on our labels, and on all over the UK, it is a legal requirement. If you were telling a customer it is a country of origin of something, from that point of view, it would be where something is manufactured. It's a legal requirement for us on our labels. I know what you are trying to say, so like from the design point of view, so like it's designed in the UK, so why the country of origin not the UK, but the country of origin is the technical term.

INTERVIEWER: And what would country of origin mean in relation to your brand?

PARTICIPANT: Well, I think it's very important. I mean some customers are very aware of where the garments are being made, so if the garments are made in country that are deemed to be a third world country, or don't have the correct kind of structure in place, don't have clear work ethics, further staff, then there people are kind of put off with it, especially where there is so much media involved, with everything that has happened in Bangladesh, everything that has been happening in Pakistan as well. So an element of the customers would be put off by where it is made. Not everybody, but elements of it. And also, us looking from an ethical point of view, we have to also make sure that we are suggesting where things are made, and whether that is appropriate or not.

INTERVIEWER: So like you have talked about how consumers are aware of this Bangladesh incident, and how this impacts , and you have also mentioned about how some of your products are also made in those similar country, how do kind of develop that positive image again, especially having those country associations?

PARTICIPANT: Well, I would have thought yes, because at that time when Bangladesh crises were happening, I had just moved onto the denim department, so we were doing a lot of products with Bangladesh at that point because it was a country that we had just gone into. Probably, about 6 years prior to this period, when they had just started to really do the denim, we had to work very closely with them, to get them up to the level and the standard we

required. So obviously, when everything happened, we had to be very aware that our products were being made where it said it was being made, which is a very difficult thing to not have a visibility of. But as a business, we are very lucky that our suppliers want us to use Bangladesh as suppliers even today. The one suppliers we do use is a completely vertical operation, they have their own mill, where they bring their own cotton, make their own yarn, make the denim fabric and they weave it all on the side. They have a massive factory, it was very apparent that my goods were made there, and their workforce was left on sight. So it's not a green factory, but it's like a little compound. So the first thing we do is go out and see them to make sure that everything is ok, like their staff and everyone is satisfied. The second thing we did as a business were, we signed Bangladesh agreement, which is what all the UK retailers have signed to say that we are allowed to the use the factories, and that we are working together with them to make sure that everything was up to scratch and standard. I don't think, I have not seen any issues with having Bangladesh on the care label, not seen any reassessment from the customers. I mean that was the time when I would have thought that the customers would have been negative towards it, but they weren't. So it didn't develop a negative brand or product image.

INTERVIEWER: In terms of your Bangladesh and Turkey, these are related to your apparel production. Now, how important would you say is country of origin to your brand?

PARTICIPANT: It's not very important if you look at consumers that are targeted for my products, I don't think he/she would think about where it comes from, or who it has been manufactured. Customers today want that garment, regardless of where he/she is buying it from; she will kind of get her hands on if that's what she wants it. I think having a British heritage is an advantage, but I don't think if it wasn't a British heritage or a brand from another country it would matter if they want to buy it, they will.

INTERVIEWER: So we have previously discussed country of parts, manufacturing, brand origin, what about the design? Does that have any association? Is it the silhouettes or the patterns and prints?

PARTICIPANT: Well no, for me it would be silhouettes. So that would be the actual shapes that will be designed. We have a print design team in (COMPANY A), so a lot of our prints are designed in-house. When some of the other teams are buying fabric, they will be buying prints from turkey or Italy or something.

INTERVIEWER: Now in your opinion, which component do you think is most important?

PARTICIPANT: Yeah, to be honest, I don't know, because again it would be based on the design of the product, I mean it would put me off if the country of origin would not be what I expect it to be. If someone said it was designed somewhere remote, if it was the finished product you wanted, I don't think it matters. So there is no particular dimension, I would say the whole generally.

INTERVIEWER: is there any particular dimension that is most important to your brand?

PARTICIPANT: I would say country of origin.

INTERVIEWER: And how or not do you think is a relationship between a brand and its country of origin?

PARTICIPANT: I think, I don't know. I don't think regardless of the brand. Because I generally don't think, I mean, if I was working in a market, or if it was a different market then it would matter more, if I think about people like my mom, I think she would be much more cautious about where she was buying her stuff from. But I think that's a very old fashioned approach to design, and I remember, my parents were always like you should buy stuff from marks and spencer because it's a British brand, and it would last you so long because it has a good quality, and then as you learn more about things, not because I work in an industry, but because of the internet, you realize they don't make stuff in UK, they make their stuff in Pakistan and Bangladesh. And if that were good quality, then why wouldn't it be good quality somewhere else.

INTERVIEWER: what do you think is a relationship between a brand and its product?

PARTICIPANT: So I would say (Company A) as a brand, we have an idea of who our customer is, what we want to get across, like I said we don't take things too seriously, Its like chic, tons and fun. Kind of identity is taken in every

product, so regardless of what department its on, we look at things like is that right. So it could be a jeans, T-shirt, so is that us, and our brand, or not. I think it's a bit more serious and we need to make it fun, or is it a bit too mature that doesn't cover our fun and young. So I would say the relationship between the product and the brand is kind of hand in hand.

INTERVIEWER: And do you carry research on brand perception?

PARTICIPANT: Yes.

INTERVIEWER: What are the results of the research, and how is it used to develop further brand strategies?

PARTICIPANT: So we get brand perception from an external COMPANY, like the market research COMPANY. They look at the brand as a whole, so it's done on three different type of customers: some that never show up in our company, some that frequently shop, and some that shop every now and again. But we get the information back by age groups, so we get 25 to under, 25 to 39 and then 39 and over, so that is done for the whole high-street. So we then get the brand perception, and then the perception on the each individual within those departments.

INTERVIEWER: You have previously mentioned about different age groups, and then this new development of wholesaling. How has that had any impact on the business?

PARTICIPANT: I would say yes, but again that would be my personal opinion. But even on a personal note, a lot of my friends who may fit in the category - that rarely shops in (Company A), they would go and see something on ASOS, and then email me and say "we have seen this on ASOS, can we go and shop on weekend", But they would never do it through my website. But that is because it's (Company A) website, that they may not necessarily go on, and so, for me that has opened up. So the person that would have never shopped in (Company A), and never was to is proud to pack in (Company A).

INTERVIEWER: what you are saying is that the online wholesaling has had a positive impact on the business?

PARTICIPANT: Yes. Like another example I was in New York, and we were out an aisle, on a ship, and I had seen one of the girls wear my jacket. So I was like oh ok, hopefully she is not English. So I went to her and said "oh I really like your jacket, where is it from? just to be a bit nosey". And she said to me that it's from this little UK brand, (Company A). I bought it from ASOS, have you heard of them? so she has bought it from ASOS thinking it's a tiny little brand, like all the other brands were like who (Company A) was, but it got her interested in it. So I think it's a really good tool for the business.

INTERVIEWER: Ok, so this question reflects back to country of origin, very briefly, do you think country image has an impact on a brand image?

PARTICIPANT: Again, I would say in some circle of people yes it does, but generally NO, not to like day-to-day consumers.

INTERVIEWER: Do you think country of origin and the brand message generally impacts the brand image?

PARTICIPANT: I think it depends, and this might be a little bit more retailer, like - if you are seen as a fast fashion, chic price point, I would say, yes it does have more impact. Like example Primark – people think it's too good to be true, so something negative must be within that mix. Especially with things here, manufactured back in Bangladesh. So they think, they are one of the contributors, everything that has been happening there. The two things are, but soon as you try putting price into that mix that kind of triggers most people.

INTERVIEWER: would you say product price is an element that can have an impact?

PARTICIPANT: Yes, I think price is a cue that is the most important element to the consumers, so that kind of gets their heads to thinking, about where something is made. So for instance if I buy something in Topshop that is way more expensive than now, but it's better to be because it pretty much guarantees the product is made in UK, but the same is with Primark, you go in and you know the product is probably made somewhere, where it is not desirable as such.

INTERVIEWER: now can you think of other way your brand emphasizes on country of origin?

PARTICIPANT: Well that's what I think; you know when I was saying about the heritage. Our company I think kind of plays on the British heritage because they have [...] girl and [...] road. And then they also did collaboration with young designers, which may not be British, but they all come from London College of Fashion. And when we do make something in the UK, we kind of do have something on our branding, which says that it's made in the UK. Kind of like shout out about it, that we are part of like the heritage. Not shout, but do branding about made in the UK.

INTERVIEWER: And would you say that had an impact on the brand image?

PARTICIPANT: Yes, and No. Like I have previously touched on the price.

INTERVIEWER: And the colour and design, any association that has to cultural aspect or nation, or is portrayed as a promotional tool?

PARTICIPANT: Not so much. As a fashion business, most of it is inspired prominently from the fashion shows, not just London but we would look worldwide. We would look at shows in Milan, London, and And then because we are a very youth brand, we are also very inspired by the street styles from New York to Copenhagen. But I think we are lucky to be a British brand and be based in the British high-street, because I do think they are like the best shopping destination.

INTERVIEWER: So you have mentioned about collaboration with Rihanna (American singer with British brand), did that have any impact on the brand image?

PARTICIPANT: Well we don't have any stores in U.S, we did pop up with opening ceremony. Which was defiantly a success, but I think what Rihanna did for our brand was, girl that recognized her in US and UK, wanted to be like her, so they had that element. And then advertising definitely got our brand name out in different market.

INTERVIEWER: Do you have an online service, and catalogue service?

PARTICIPANT: We have an online website, which is a UK website. And then it is also translated into other countries like French, German... U.S website and Australian I think.

INTERVIEWER: And is there anything that talks about the brand heritage?

PARTICIPANT: There is a section called 'our history', which gives you a little bit background to who [...] family is, what we are about, but because we are a privately owned business we don't say too much.

INTERVIEWER: Now last question, in general terms how do you think these messages impact a brand image?

PARTICIPANT: On a very positive way, yes! I think its an opportunity to kind of use something that we are very known for and then also to get new people in to help us promote the foundation of the business. It all has been very positive. We do different things for different themes and times and year. So we have marketing campaign and magazines most prominently, also had bus stops. But probably add magazines, we have ad campaign in most of the glossy's now. So like weekly and cosmopolitan.

INTERVIEWER: And is there any way you advertise the British association.

PARTICIPANT: No in the magazine, it's the advertising photography. So it will just have whatever river's tagline and then everywhere else.

Company B1: Head of Department

PARTICIPANT: I am [...], and I am the head of innovation and quality of (company b), which basically means I look after all the quality and innovation for all non-food products, anything from lipsticks, underpants, furniture. So its quite a lot of products that I look after.

INTERVIEWER: so can I ask you how long have you worked in this Company for?

PARTICIPANT: 12 years

INTERVIEWER: can you please tell me what you understand by the term 'country of origin'

PARTICIPANT: To us it has a legal definition, which is about the last place of where the major manufacturing takes place in process.

INTERVIEWER: So what does this mean in relation to brands and products?

PARTICIPANT: We as a retailer choose to tell everybody the country of origin of our products, so you don't have to in this country, but we choose too. One of the reason we do this is because it is illegal to misrepresent where something that is made, but it is not legal (compulsory) to have to put on where something is made. So for us, because we are a single brand retailer, and such as a well-known UK retailer, it kind of, if you are going to put (company b) over something, we kind of feel like it should be totally legal, and it's appropriate that we label country of origin to our merchandise. In other words, we are (company b), UK based company, but the product is made wherever it is made. And also some customers have a choice of not wanting to buy stuff from, so we give them the choice, and so it's totally appropriate for us.

INTERVIEWER: So what about country of parts and country of design?

PARTICIPANT: well we don't tend to pull out on where things are designed; it's not a major thing for us. Unless it's a specific collection and we need to add detail.

INTERVIEWER: So what about fabric?

PARTICIPANT: Sometimes we say where the fabric is from Italy and etc, Yes.

INTERVIEWER: Do you think it has an association with Britain or British?

PARTICIPANT: We will sometimes pull on Italian fabric, and that is through the mill label. So if you look at our suits, some styling is associated with Italy, so we would put the name of the fabric mill on, Italian fabric. On some products, it's appropriate to tell customers that fabric is made in UK, so for example Harris tweed. You would want to pull out that it was from the isle of Harris.

INTERVIEWER: Also, do you think the Italian fabric and made in has some sort of influence on the image of the brand?

PARTICIPANT: Well you see, our brands is a the master brands of (COMPANY B), it has different facets, so if the product is appropriate enough to pull out Italian fabric, in a suit for example, like we have a range for example called [...], which is our sub Italian brand for men's wear, in which case, we would pull out that the fabric is Italian, but clearly we wouldn't want to be denoting Italian fabric in our best of British collection, it's not about that, I mean most of the British collections are British.

INTERVIEWER: But do you think it affects a brand image?

PARTICIPANT: No, the key thing is to make sure to pick the bits that you feel are appropriate to those products, so people would for example, emm expect our Harris Tweed from the isle of Harris, so if we said Harris Tweed was from Italy, it probably wouldn't even work.

INTERVIEWER: Which dimension would you say is more effective and credible in your opinion? Is it country of design, country of parts, country of manufacturing or country brands?

PARTICIPANT: It's the whole product

INTERVIEWER: It's got to be the whole product, but what if it has different bits from different countries, how do you think that would impact or it wouldn't?

PARTICIPANT: I don't think it would, no.

INTERVIEWER: Do you think these dimensions impact the brand symbolically or emotionally; so you know how consumer often tend to feel patriot feelings towards products?

PARTICIPANT: There are not many, it depends, so for instance this jacket, no one would really care where it's made, it's actually made in China, and we would say made in China, but that is kind of brand positioning that we would like to tell people where things are made, it's not a promotional information, if this was a beautiful, super fine wool fabric, and it was Italian fabric, then we put made in Italy, because then that would be important to the customers. So it's only appropriate on appropriate products. But we tell them anyway, so we would tell people wherever anything would be made. But like no one would mind like where my jeans would be made, but there is no benefit for me saying Turkish fabric and made in turkey.

INTERVIEWER: So this is a bit like if it's from a high developed country or whether its from emerging market.

PARTICIPANT: Well it totally depends on the products and what customer's expectations are

INTERVIEWER: How important do you think is the relationship between brand and country of origin in general terms?

PARTICIPANT: It depends, so if you say Jack wills, so Jack wills says all about British this and British that, but they don't make anything in Britain. So they clearly don't think it's important where it is made, in their context of the brand, and I don't think the customer do either, so I am not sure how important it is. If you were talking about a top end suit, and you were paying £2000 for a made to measure suit, and you wanted it to be British fabric; you would expect it to be Holland and Sherry or one of the top brands, so that is different, but so, it does depend where you position your brand, whereas if you look at Primark they don't do anything about where the product is made. There is no country of origin what so ever.

INTERVIEWER: What do you think is a relationship between retail brands and branded products?

PARTICIPANT: Emmm, so we are own brand retail.

INTERVIEWER: This has to be rephrased, as to what was the relationship between their brands and products?

PARTICIPANT: Well, very important,

INTERVIEWER: So how important is your brand name to your branded products?

PARTICIPANT: Very important, it is the most recognized brand on the UK high street. It has been going on for 130 years. Stands for quality, trust, value service and innovation, so all our products have to fit in with that brand value.

INTERVIEWER: Any message?

PARTICIPANT: Quality, trust, value service and innovation

INTERVIEWER: Do you think your brand name has any relationship with its country of origin?

PARTICIPANT: No.

INTERVIEWER: Do you carry out research on brand perception?

PARTICIPANT: Yes, of course.

INTERVIEWER: What are the results and outcomes?

PARTICIPANT: It changes in different time, so we would measure our brand perceptions with other retailers, or competitors. So we have a set of questions, we do a market research to see how they perceive our brands, compare to other brands.

INTERVIEWER: And how is this used to develop branding strategies:

PARTICIPANT: Well it used to understand what is happening to our brand momentum. So whether consumers perceive our brand in a positive or negative way, and could you think of others ways through which your retail brand or service uses country of origin. I think, that assumes that country of origin is a big driver, but I don't think it is. Not in mass market apparel. If you take top retail brands in UK - 1. (Company B) in Value in volume is Primark, number 2 is volume would be George, number 2 in value would be next, and none of them make anything about country of origin at all. The only one that does is US, we have a little bit, and that is because we have a best of British range, but that is tiny, like 5 stores.

INTERVIEWER: So is there any other way your brand may emphasize on country of origin, i.e.: logo, celebrity, music, and etc.

PARTICIPANT: Our brand is so big, and we are not selling our brand in our other stores like Barbour does, we don't need to.

INTERVIEWER: Do you have an online service?

PARTICIPANT: Yes,

INTERVIEWER: Is there any way your brand emphasis on COO in that?

PARTICIPANT: No.

INTERVIEWER: And how important do you think these messages impact the business?

PARTICIPANT: Well yeah, we will bring them out in the appropriate products, so like its an Italian suit and fabric, then we will say where the fabric comes from. or if it is from the best of British range, then we will talk about the British yarn, fabric, where its I made and everything.
So some of your products say 'Italian Fabric', does that associate with where the fabric is manufactured or the country the fibers in the products are associated with.
No, that is related to where the fabric was manufacturer.

Company B2: Assistant Buyer

- INTERVIEWER: Could you please tell me about your role?
- PARTICIPANT: I am an assistant buyer – I work on international lingerie, have been with (Company B) for 2 years, working on UK side for about a year, and then international side for about a year.
- INTERVIEWER: Can you explain a bit more about your role, please?
- PARTICIPANT: What we do internationally is we offer; well, what you get offered in the UK is like a marble arched, and we offer all that to our different partners, and they can then order behind those lines, and then, if they have any additional requirements - that is what international buyers is out to do. So we develop additional way, so normally copycat lines from the UK, but include additional colours. For example in India, it's much more value driven market, so we do additional ways knit packs for them, additional prints and colours, different size variations.
- INTERVIEWER: So tell me a little bit about the brand, what is it about?
- PARTICIPANT: So the real drivers behind (company B) is the quality of the brand. So our customers expect our products to last for a longer period. I think they expect slightly more premium products compared to the rest of the market, so, this includes the best trims, the beautiful embroidery, better quality product, in terms of better stitch count, but also nicer quality fabric, something that will be durable in the wash, but at the same time, they are still expecting better value for money. So, they might be willing to be a little bit more, buy they want better quality from it. It is also a very innovative brand, so we have a huge amount of innovation within our lingerie department. Our customers expect to see something different and we are specially known for our core competent technology, which we have driven on all sorts of lead innovation across the market.
- INTERVIEWER: So where else would you say is (company B) sold?
- PARTICIPANT: We don't have any external brands. We don't sell in any other outlets, only within our website and store.
- INTERVIEWER: Why don't you sell other brands within your store?
- PARTICIPANT: Because we have more control on our brands. You can plan how your brand is perceived by everyone, whereas, if you sell it through the other stores, such as concession, you don't know how it'll be displayed, how will the store environment be, don't know what type of customer service will be provided through the company. Like, we have all the control over our brands, but it's very unlikely for us to have control on the brand, if it's being sold in another company. For example, i use to work for a company called Rides, and they use to have concessions in New Look, Dorothy Perkins, and we use to find it very difficult to know how our products were being displayed, and those kind of things. We also have franchise abroad, and even that, we find it more difficult to control on how our brands are perceived, because they can buy what stuff or range they like, we can try to encourage them to buy in line with what UK would buy, but they might say no, that doesn't work for our market. So they might not buy the colour as much, or might not buy the whole range, or shape, and even that is hard because we have lost a bit of control, as in our franchise contract we have an agreement that they can buy what they like.
- INTERVIEWER: Ok now can you tell me what do you understand by the term country of origin?
- PARTICIPANT: So it is where the product is produced, because it relates to the country it originates from. So I would perceive it as where product is manufactured, rather than like, you can get the fabric from somewhere else, but I perceive it as to where all the components are put together to a final product, and then shipped.
- INTERVIEWER: And why is that?
- PARTICIPANT: Because if you look at every single different sources, where it came from, like in a bra it can be 22 different components, that can be from many different origins, so where it's all put together, to simplify it.

INTERVIEWER: So what does country of origin mean in relation to your brands and products?
PARTICIPANT: So our brand has a British feel to it, because we retailed it, traditionally started in UK about 150 years ago. This history behind it makes it a very British brand, and we use to be known for manufacturing in the UK, but of course, that has changed a lot over time, but we still do have a British collection, which is still manufactured in the UK, and the all the main operation is from the UK, but there is a massive drive for push into international market, and becoming a multi-retailer.

INTERVIEWER: And what would you say is country of origin to your product?
PARTICIPANT: It varies, so in lingerie – we get our products manufactured in Sri-Lanka, China, India, and Turkey.

INTERVIEWER: How is the product in (Company B) manufactured premium, compare to other products?
PARTICIPANT: For example, in lingerie the only factory we have in UK are hosiery factories (which are the tights). So they are much more machine intensive, with skilled workforce and technical innovation, rather than labour intensive, so that is really one of the only reasons we can afford to keep it operating in the UK. But I believe that the British collection is all in menswear, with much higher selling values, so they do cost much more, and therefore, are more premium.

INTERVIEWER: So is there any other reason, why they are premium?
PARTICIPANT: It is just that the quality fabric from the wool mills is based in Scotland, and has really nice jackets that are tailored here. So you are suggesting that they are using high quality products, it's like the traditional British tweed.

INTERVIEWER: Which dimension would you say is more creditable or effective in your opinion?
PARTICIPANT: I think country of brand is most important, because our partners as well- they know us as a quality British retailers, and I think that is why they want to buy our products, they want to inspire to that, western brand, rather than where the products are sourced from. (Country of brand, western brands)

INTERVIEWER: How important or not do you think is the relationship between a brand and its country of origin?
PARTICIPANT: I think It has become less and less important. I think it's because our society is changing, people are so price conscious, and they expect you provide such a huge competition in the market that I don't think consumers expect the products to come from UK anymore. I think they would be shocked, or are shocked if it does come from the UK. I think it's often more about marketing and promotion rather than where the product comes from. They still want a good quality product, manufactured to British standard, but I think they would rather have the price, with the benefits of manufacturing abroad. I think customers don't care that we have lost the manufacturing in UK.

INTERVIEWER: What do you think is a relationship between a brand and a product in general terms?
PARTICIPANT: I think it's really strong and important. I mean we have had quite a few changes within our brand recently. And if a brand in women-wear weren't doing very well, it would affect our brand in the beauty product as well, which would then affect our product sale. So even though the week before it hadn't been branded, we still get negative effects on the products of the brand, so it has negative impact. Whereas, if the brand is doing very well, for example we have a[...]graph, so a[...]h in lingerie, so like anything you propose a[...]h on does it amazingly.

INTERVIEWER: So you are saying that a product is purely dependent on the brand image?
PARTICIPANT: Yes, so it's closely linked, and it has to do with the marketing, social media, people connection to celebrity, which is really important. I see it gets people excited when you are advertising and branding, which is effective to your product. But if the product isn't good, it wouldn't sell even if it has branding on it. If mean, marketing can have an influence, in terms of brand positioning, but we always have a saying that a customer will find a good product, whether its branded or not.

INTERVIEWER: What would you say is a difference between brands and its product?
PARTICIPANT: The brand is an aspirational image, perceived person a customer wants to be. Whereas, a product is a functional entity, that has to do its job, it has to have all those benefit, that lend itself to that brand, carrying same personality as a brand. So if it's a very pretty branding, then product must contain the pretty personality, maybe with lace or something.

INTERVIEWER: So what does the term brand means to you?
PARTICIPANT: I do think it's an aspiration vision that a customer has in its head, which leads to an immediate association with the quality, creating emotions for the customer. Whereas, a product can create emotions for a customer, but I think it has more functional job to it, and fill them with their fashion needs.

INTERVIEWER: And is this association with the name, logo, and sign?
PARTICIPANT: I think people think we are (Company B), and know the our labels within our brand very well, so people basically straight away associate it with quality.

INTERVIEWER: so what does (Company B) say about the brand, in terms of a brand message?
PARTICIPANT: they are trying to say that we are at a different edge of fashion, amazing quality, innovation, but also catering to our homeland core market 55+, but also attracting younger customer. We have a big core +55 plus market, but we are trying to encourage younger 35 market. We do tend to have younger customer internationally and in UK. Our brand is trying to attract a range of younger customer through our sub-brands such as P[.], [..]graph and etc.

INTERVIEWER: Which market would you say is (company B) driven by at the moment?
PARTICIPANT: 35 to 55

INTERVIEWER: Do you think (Company B), as a brand name has any association to the country of origin?
PARTICIPANT: Emm, not to where the products are produced, No! It is recognised as British brand, so by its brand origin, which is commonly through its history.

INTERVIEWER: So do you carry research on brand perception?
PARTICIPANT: We don't within the buying role, but we do have CIU unit, which is customer informational unit. They do a lot of work on branding, target market, how product and advertising is perceived and etc.

INTERVIEWER: So you have previously mentioned about how some of your products are being manufactured in Sri-Lanka, Turkey and so forth. Do you think this has an impact on the brand image?
PARTICIPANT: I think, it would have many years ago, but I think, customer expects it to come from other counties. So, when it has Britain on it, customer perceives products to have better quality. I don't know actually why it is, but I think it is because they know what the UK standards are, and we implant those UK standards internationally, wherever we produced, but I still think people see that subconscious message, that people see British, made in Britain, which it is about the quality. Because they know labour is more expensive, I think they imagine it to be much tighter watched quality standards, which are tighter. I think it is also because; we don't have same issues as (company b), because we audit our stuff very thoroughly. But I think loads of companies have association with child labour abroad or bad conditions, whereas all of our factories have to be certified to the standards. But I think that is the general perception on the market. I think there have been so many programs on things that have happened abroad, that people have an insight into that, rather than what they have seen in the UK.

INTERVIEWER: So is there any other way, you emphasise on country of origin construct, or use it as a brand message within your product? Where is it your product designed?

PARTICIPANT: Most of our products are designed in the UK. I mean we sometime have embroidery or lace suppliers, it might say Swiss designed, just from where our suppliers are, but it's not necessary that the product is manufactured in the same place, it's just where the lace may be designed.

INTERVIEWER: So how would you say that influences the brand image then?

PARTICIPANT: I think it attracts the customer's attraction by saying that there is care gone into the design, I think it's drawing the fact that we care about where we get our things designed from.

INTERVIEWER: Is there any other way your brand emphasizes in the components of country of origin within its products?

PARTICIPANT: Not in lingerie, maybe about Italian leather, but I am not sure.

INTERVIEWER: and how does country of design impact a brand image?

PARTICIPANT: I think we are quite proud to say where we have designed it.

INTERVIEWER: Does (Company B) associate with British heritage in their marketing, service or advertising in any context?

PARTICIPANT: Yea, (Company B) has done that association with [...] harbour, with its big wooden table, providing traditional English feeling. And then we have [...], which is Italian and has a little Vespa motorbike, which has Italian feel, so they have tried to do that as well. This is in one of our biggest stores, within UK stores, down in high street, Kingston.

Company C1: Designer

INTERVIEWER: Could you please tell me your role?

PARTICIPANT: Jersey wear designer for women's. So we basically search in the trends and then do trend analysis and designing, CADing up and then creating giftpacks to the technical team and then they do the technical specifications. And then we do fit sessions and that kind of stuff.

INTERVIEWER: And how long have you been in this role for?

PARTICIPANT: Just over a year

INTERVIEWER: so when you say trend analysis, is this looking at anything in particular?

PARTICIPANT: yeah, we look at competitors and what is out there, but also look at the historical references, and we also look a little bit on the catwalk. For brands like ours, its relevant, but it does not have a massive influence, especially for jersey wear.

INTERVIEWER: When you mention competitors, can you name a few?

PARTICIPANT: We have been looking as a whole, at brands like Arc'teryx, they are like the high ends, and then brands like Sweaty Betty, because we are kind of focusing on the performance element within our garments at the moment. And then I kind of look quite a lot for more for jersey wear, like higher end jersey designer, like Alexander Wang, and Hussein Chalayan.

INTERVIEWER: and you mentioned about historical... can you explain that a bit?

PARTICIPANT: Well we have been looking a lot at like military references, like parker coat and stuff in jacket category. In jersey, the historical references are more like athletic, kind of like traditional styles. It's just kind of mainly from the construction point of view, why someone would design something; like a long time ago, display seams and things like that. It's the purpose of the garment, which is kind of what we have as an understanding at the moment.

INTERVIEWER: so is this English military or just general?

PARTICIPANT: just general, to be honest we are not really a; we don't want to appear to be like vintage or historically classic brand at the moment, it's not really us, but there is still probably constructions or detail that we can still apply to our aesthetics.

INTERVIEWER: so can you explain a bit more about the construction?

PARTICIPANT: So maybe there might be a certain way to construct a sleeve, that allows you to move easier, or move seam from the traditional place, well like the normal side seams from across the shoulder, the idea is that you don't have any abbreviation. So if you had rucksack or something like that.

INTERVIEWER: so it's more functional would you say?

PARTICIPANT: yeah, we are definitely going for more functional, kind economically designed product at the moment. But I think it's more relevant on other categories than jersey, a jersey is a performance fabric in itself. It stretches, so it's breathable.

INTERVIEWER: So in terms of (Company C) as a brand, what would you describe as?

PARTICIPANT: Well we have had a bit of re-branding, which is actually hitting the store end of this summer. So now we have been; I am sure you can find some information on it from the Internet as well and there has been a few magazine articles about it as well. So, basically we launched it at bread and butter with a new kind of aesthetic and everything. So we are now kind of designing this multipurpose clothing for the city and the idea is basically as a city dwellers, you could wear your clothing to numerous kind of social occasional, or so basically like work or

bar , or whatever during the week, if you are out with yours friends and stuff. But you can also wear it while riding your bike at work, or there might be some adaptable features in it that are going to mean that you could wear it all different occasions, you don't have to buy new clothes if you are going for a walk in the country side, so that is the kind of thing, so that is kind of aspect or thing we are going for now, but it is still aimed at city dwellers, we are not going to be like, we have got a performance range which is kind of like specific for mountain or we have active wear, which you wear to yoga and stuff. So our life mainline range has performance elements within it, but if you wanted something more specific then you would have had get it from the performance range, but it's still really highly adapted for multipurpose situations.

INTERVIEWER: so when you talk about multipurpose city clothing. As you are designing, do you have a specific city in mind when you are doing or...?

PARTICIPANT: Not so much! I mean we are not specifically focusing much on that 'it's a Manchester born brand', it's not specially designed for people in Manchester, and it's like multicity. To be honest, the UK isn't our biggest market anyway, it's like Germany and Canada, so I don't specially design for a specific city, but it is for city dwellers.

INTERVIEWER: so like when you design, do you not have a specific in city in your mind?

PARTICIPANT: yeah, its like European countries mainly I guess, like the idea is kind of like, I see a person who maybe commutes to work by bike, train, trams, and they want to or they don't wear suits to work, they don't want to getting changed when they get to work, but they also want something that is going to be comfortable if they want to go to a bar or something. Its kind of like, I see it for someone who has got a very adaptable life, they don't really know what they are doing next, but they'll be prepared for it.

INTERVIEWER: So as a brand, is it still trying to keep some elements to be British or..?

PARTICIPANT: Not particularly, we are quite sure that we don't want to be seen as a traditional British brand. We want to be seen as something to slot into an existing wardrobe. To be honest, we have gone quite clean with the new aesthetics, like there won't be any grey, vintage wash, or vintage element that is too grungy or anything like that, it's quite a clean look now.

INTERVIEWER: so in terms of design, when you talk about design and prints, would you associate vintage and grudge with British elements then?

PARTICIPANT: so like, yeah if you look at jack willis for instance, they have got like very athletic kind of tradition, and you look at, I don't know, brands that have a very Punky and rocky elements, which is very British, and then you have very twee vintage, high quality thing that they are trying to get across.

INTERVIEWER: So what type of brand would you class yourself as?

PARTICIPANT: what we are trying to offer like now is kind of, we aspire to be like one of the premium brands which is going to be like Stella McCartney, Adidas, Arc'tryx, that kind of thing, but our prices aren't that high, so we are never going to be able to do that level of manufacture, but we want to add elements from those garment into ours. We are not High Street, we are premium and do these thing because it's good, better and best. So we have tearing system, we will have one garment that will be at the top price point, it's kind of more applicable on jackets than jersey. So maybe it will have tape seams, and three in one elements, so you can zip up the jacket like with the lining and stuff, and maybe it will have DWR and tape seams, and fun hood, where the hood might come off or fold in itself, so something like that. And then you will have another version of the same garment, which will not be as good, but will still have some elements, and then you have the best, which is our not basic but a garment that has got some of the features or the looks of the features, but perhaps doesn't perform as well, but then obviously your price point reflects that.

INTERVIEWER: so where else do you sell your brands? Would you say retail store or departmental?

PARTICIPANT: well we have retail stores abroad, but in Britain we mainly sell through independent stores, and then we outlets that are specifically designed for us.

INTERVIEWER: But do you sell your brand within department store as well, or would you say your focus is on retail or wholesale?

PARTICIPANT: Well, we have sales agent across the country - well, world really. We have German agents, North Americans and Europe, and they would sell it to independent stores, but I think we do have our own stores as well. My colleague will be able to tell you this better, as she has worked here longer, so we have our own stores in Britain, we have our own stores in Germany, I am not sure whether in Canada they sell more independent and in bigger departments - I assume they might be concession, but I am not sure. You might need to talk to someone in from a sales team about that, but I know that the biggest countries that we sell our brands are too Canada and Germany.

INTERVIEWER: so in terms of selling your brands in retail, do you collaborate with other brands or do you only sell your own brands?

PARTICIPANT: No we just sell our own brands; we are not involved in any other brand.

INTERVIEWER: In general terms, what do you understand by the term country of origin?

PARTICIPANT: well initially I assumed you were talking about where the product was manufactured, but obviously there is an aspect of where the design and kind of inspiration for the brand and clothing comes from. So there are two aspects, but generally I would associate it where it's actually manufactured.

INTERVIEWER: and what does country of origin mean in relation to your brand?

PARTICIPANT: With (Company C), I suppose we are still known as A British brand, but not in a classical sense anymore.

INTERVIEWER: In terms of products, what would you say is country of origin?

PARTICIPANT: For an actual garment I would assume it's where it is manufactured, for a stand-alone garment. But if you were talking about a brand, I would say country of origin is where it is designed basically.

INTERVIEWER: But would you say that there are some kind of associating with England?

PARTICIPANT: well I am not as most of our garments are produced in China and Far East, but as a brand, we are known as a British brand.

INTERVIEWER: And in terms of part, what associations would you say this has with country of origin?

PARTICIPANT: emm well most of our is produced in China, I mean I think most of the companies would get the fabric and then construct in the same country, just because it cost a lot to transport to other counties.

INTERVIEWER: so are you in other words saying that country of parts and manufacturing is done in the same country?

PARTICIPANT: yeah, most of them are similar. I know companies, which do import Chinese fabric to the UK, so that they can produce it within UK, which I guess to that a customer would say it's a UK garment, but that fabric was unlikely to have be woven or knitted in UK, just because so expensive to do it here. And then I know that some companies import half-finished garment, and then say it's produced in like Italy, if some sews a seam on it. I know there is an aspect of that, which goes on it. But don't think an average customer would know the differences. So if a customer saw a garment that says made in Britain, then they would associate that to be totally British, but it's probably produced in Britain by Chinese worker.

INTERVIEWER: Would you say country of origin is important in relation to your brands?

PARTICIPANT: emm, I think it is important to most brands, a customer kind of associate's British product with British design, and for me it likes the technical knowledge. And then there are brands like super dry, which is a British brand, and does some British heritage, but then would associate that with japan, because they have this trying to pretend that they have this Tokyo chic thing. It thinks it is important because people have connotation with certain countries. For us the brand being connected to Britain is important for most our customers.

INTERVIEWER: So in terms of your brand, how would you say you are showing that importance or country of origin.

PARTICIPANT: Well it's a bit tricky now, before there use to be references being from Manchester. But maybe, they just see it as a western product now, or maybe they already have the knowledge, we have been here for quite some time so they must know that we are a British brand. But it's kind of building on what we have done, because we haven't discounted our styles that obviously sell really well, and what you see as classic (company c). We definitely haven't gotten rid of those. There are still connotation to our brands, it's not like we are a totally new brand, and hopefully, customers just see us as a good quality brand.

INTERVIEWER: ok, so in your opinion, which dimension is more effective or credible?

PARTICIPANT: Emm, well I would kind of say country of manufacturing is what I would associate with whether the garment is good quality or not.

INTERVIEWER: and why is that?

PARTICIPANT: Because I know that garments from certain countries are less likely to be good quality. I mean in my previous job, we have tried producing it in India and it has not been good quality. And producing out of UK is because of the price of the labour, it's not great quality either.

INTERVIEWER: and can you point out why you think it wasn't the good quality, was it the technology, or something else?

PARTICIPANT: Yeah, it's the technology. I mean in the previous job because we use to manufacture out of UK because of the labour and like the rent and stuff were so much more here, that would afford to do zips and that kind of things, it's quite limited here. If I see something in the UK that says made in Britain, and it's like over £100, I would know it's going to be rubbish quality, just because that's what it costs to product out of UK, it's just so much cheaper to produce it in the Far East and ship it across, it's crazy, but it's just the way things are.

INTERVIEWER: So, you have touched on how if you saw a product for less than £100, you would associate that with poor quality.. now, what element would be judged as poor?

PARTICIPANT: I think, I know some brand solely produce out to the UK, like the leather goods and stuff, but they are like over £100. And I know like marks and spencer has been selling UK produced range, and that was very expensive. So, I assume that all of it was made in UK, perhaps the fabric was shipped, I know Harris Tweed comes from UK, and you pay premium price for that. But this old company I use to work for which was boohoo, we use to produce things in Leicester, which was stretch garments, like cheap garments basically, and we use to say oh Made in UK. But I knew that they wouldn't be the best quality because the price wasn't high enough to, so you know.

INTERVIEWER: What about designs, why would you say that is important?

PARTICIPANT: yea, like it is, because obviously there is different kind off. To be honest, as a person I would prefer things to be designed in the west side – like UK, Europe and North America, because that is just the style we wear here. Like I use to go China with my old job, and we use to go to this market hall, where you can buy ready-made garments to sell basically. There factories just design and produces garments, and they just didn't have, well their understanding of fashion and style was so different to like British. Some of them garments were like something that maybe people in China would wear, but people in UK, you would generally never see them wearing those garment. So there is obviously social kind of thing that dips you from different countries wearing different styles. Even in Europe you can spot someone who is, not always but as a stereotype, you can spot people who are German Spanish, or Italian, you can tell that they are different from the British aesthetic.

INTERVIEWER: What do you think is a relationship between a retail brand and a product brand?

PARTICIPANT: so do you mean, our stores should reflect our brand, and our product should fit in with our brand idea, so basically they all need to fit in together to show what we are. Well I think it would all come down to our visual merchandising and stuff. I know when we re-branded and re-launched our brand; we had some shop re-fits as

well to kind of come inside with this. Because before maybe we were more about the Manchester thing (theme) but now our brand stores need to reflect the fact that there is this multi-purpose city dwellers kind of clothing.

INTERVIEWER: This bread and butter, tell me a little bit about this please?

PARTICIPANT: Bread and butter is a trade show in Berlin, we had a stand there where we launched our new range and like, this is like the new (Company C). And our stand there was designed with this new aesthetic, which was then filtered down in to our retail store as well.

INTERVIEWER: Are you re-branding the name as well?

PARTICIPANT: No, we are still (Company C), we are building on our history. We would never get rid of that because then we would be a new brand, and no one would know who we were.

INTERVIEWER: What would you say (Company C) as a brand would have its relationship with its products?

PARTICIPANT: Well it will be the same products, because in design we just design a range of products, and then the sales agent of the UK sales, who buys for the UK retail, would buy into that range, but they wouldn't buy a full range. Some like the specific tee that we always want, UK might little bit buy into that, or little bit buy into something else. Basically, we design a whole collection, which would work as a full collection, but it's unlikely that one sales agent would buy the whole collection.

INTERVIEWER: What would you say is a relationship between a brand and the product?

PARTICIPANT: A product needs to sit in line with the brand, a successful brand. It's all about giving a really clear message to the customer, who you are, and what you are all about, and then that should be connotations of your brand, hopefully positive ones. Like (Company C) now do this multipurpose, they have lots of clothing that is adaptable in certain ways, or clothing that got welfare out and is constructed in an economic way.

INTERVIEWER: your "Multi-Purpose City" Label. Every ø is used in a foreign alphabet, is that not taken from a specific country?

PARTICIPANT: I am not sure to be honest. It has been something that has been handed down from above, that is the font that we are going to use from now on. The font appears on the T-shirt as well. And yeah, all the O's have a cross in them. But I am not sure where that comes from. I don't think we are trying to associate with Scandinavia, I think it's only because it looks nice.

INTERVIEWER: What would you say is a difference between a brand and a product?

PARTICIPANT: A brand is a giving a general aesthetic and feeling, what you want your customers to be, and they would buy into that, like the kind of flavour we are giving out, but a specific product still needs to sit within the brand, but it's just different elements that's built together to make that.

INTERVIEWER: When you talk about the products performance, would you say your brand is more product focused?

PARTICIPANT: We have life product – which you can wear every day, and then performance range as well. So they are two separate ranges, but they both got to have a similar aesthetic and sit together, we are doing it so they can sit together in a store, but it's kind of on your end customer. So for instance, if a customer is going snowboarding, then they would go and buy it from the performance range. But for everyday life, they would something from the life range.

INTERVIEWER: Would you say (Company C) as a brand is focusing on a brand or its product?

PARTICIPANT: Our company as a brand is already well established, so we are more product focused, we have slimmed down the amount of branding on our garments, because we are going for a cleaner look. There will always be an aspect of like doing like a t-shirt with our brand name across the front, because that is the edge price point and it's easy for anyone to buy into that. But we are focusing more on the actual product, rather than super branding, we have to give our customers a reason to buy product, not just because it's (company c).

INTERVIEWER: So in general term, what would you say your brand is about?

PARTICIPANT: To me I would associate a brand to different level of quality, customers who buy into that buy. I associate with the design really, like the aesthetic of the garment. So like I would associate Jack Wills with tweed and vintage. I would associate Superdry with this weird American, Tokyo but with this hint of British association. And then of course I would associate Ralph Lauren with like American. So to me, it's the aesthetic and the design of the garment.

INTERVIEWER: So what would you say is the key message that your brand is trying to convey?

PARTICIPANT: It's this 24 hours life, a garment that you can wear at any point.

INTERVIEWER: So do you guys carry research into brand perception?

PARTICIPANT: emm we haven't done that in design, but it's done in marketing and on a higher level. Like we have been given presentation on what our brand aesthetic is, and that is what people perceive us as. But as a design team, because they have launched as a new thing, it is all quite prescribe to us what we are now, and perception people have of us.

INTERVIEWER: so you wouldn't know the results to that?

PARTICIPANT: From when we have re-launched, our products haven't hit the store yet, so I guess we are still waiting on how our brand will be perceived by our customers. I am sure in some articles; there has been some mention about bread and butter, and expo and stuff. And what the industry has thought as a whole. It's pretty positive that we have come with a very strong message.

INTERVIEWER: and how are you using this to develop future strategies?

PARTICIPANT: like I said it has been pretty prescribed to us, we have had a tight like we would have the same cut line and we would have the same one on the top, sweatshirt and coat. So it's kind of people saying oh yeah, look it's that brand. We are not relying on heavy branding for people to see who we are. And we have slimmed down on the colour pallet, and the graphics are quite specific now, that they should always have a new sign off. The font should always be the font you saw outside earlier. So it is quite tight now, as a range and I think we have worked closer together towards the product categories. So for example, I have worked with sweater designers, and as a team, we have come together and decided that things might be slightly different for different garments aesthetics, to look really strong and be easily identifiable, but without relying on the logo and brand name.

INTERVIEWER: so do you think country image has an impact on a brand image?

PARTICIPANT: yeah, I think people have connotes of different countries. So like if you look at Sigill, they have like loads of random prints from India and Africa, I think a customer for them would be someone a bit more hippy basically, into that kind of thing, while our customers are more into slick look. Yea, so I do think its effects, like I said before if people do think of (Company C) as British then they'll hopefully associate us with the technical side of the Britain, rather than the vintage, historical side of Britain. You know a lot of country have, like Britain we have this traditional side, but we also have a modern side. You can look at a different aspect of a certain country. Maybe if we were from Spain or somewhere, then maybe people would have looked at us differently. They would probably see us more hippy or something again.

INTERVIEWER: So in your opinion do you think a brand image is developed based on the design, brand origin or something else?

PARTICIPANT: it's probably the design, really, because if you have the knowledge then you can design in Britain, a product that looks like it's from that, and not from another country. It's probably the end garment from that particular range, the brand umbrella should back that up, and that is what you would judge probably where the garment has come from, if we are not focusing on the manufacturing side.

INTERVIEWER: so which element would you say is more effective on (Company C) brand image?

PARTICIPANT: it'll be the design of the garment. I think previously, they have focused a lot on this Manchester thing, which is before I started but now it's about the design of the garment.

INTERVIEWER: Are you relating this to the style or the print?

PARTICIPANT: both really, because we have done a lot of work on like styling, silhouettes and graphics.

INTERVIEWER: and would you say these are designed in terms of prints, in-house or globally?

PARTICIPANT: yeah, all the prints and designs are done in-house, like I work with the graphics team to marry up my shapes and silhouettes and fabrics with their graphics.

INTERVIEWER: So can you think of other ways through which your brand or brands in general emphasize on country of origin.

PARTICIPANT: yeah, like I have said earlier there are brands that want to play it up to "oh its made in Britain" and I think it was particularly, prevalent around the jubilee and like the royal wedding, when they had the very patriotic feel at that time. And obviously it's easy to wack a union jack on some of it and go for that retro, vintage, historical kind of feel. But yeah, aesthetically wise, you would kind of associate certain European countries, like Germany, and like UK maybe, with kind of a cleaner aesthetics as well. Especially Germany, but then they also have a crazy, while aesthetic as well. And then I would associate most of the Scandinavian countries with like a lot of northcal and like their quite heritage based.

INTERVIEWER: how about (Company C) though, is anyway they might be emphasizing on country of origin in any other way?

PARTICIPANT: At the moment we are kind of focusing on this new 24/7, and not much on this its origin, I think previously we have associated with like music bands up in the northern quarter's store. Use to do like little gigs there. And obviously, I think they were all British bands, and it was that kind of thing. At that time we were saying that oh.... They use to have a little space underneath the store, like a performance space, for like exhibitions and stuff, but that's not who we are anymore. But at that time we were doing this whole self-made thing. So it was kind of promoting, well trying to associate with these underground, or upcoming artists and musicians and stuff, but it's not what we are focusing on anymore.

INTERVIEWER: so what about online service, you guys don't emphasize on that either anymore?

PARTICIPANT: I think if you look online, it does say originated in Manchester, I don't know, you'll have to look into it, as I don't go much on it. But, I am sure in the text, there will be some reference to it. Our brand won't be all singing and dancing that we are British because that is just not who we are anymore! I think there are still a lot of brands doing that, but you need to your brand to somehow be different in order for people to buy into it. I am sure like Superdry will come to a point when they can't just sell t-shirts that says just "Superdry" on its own anymore. And like Jack Wills I think have started to tone it down, because they went through the phase of just saying "Jack Wills", I mean it's great, but people are only going to buy certain products, so many times. Your message gets diluted I think, the more people who are like your core customer target, who are buying that. And then you start associating with someone you don't want to market yourself as. That is why we have moved away from that, trying to do something different.

INTERVIEWER: and can you please tell me how your new focus/message is impacting the business.

PARTICIPANT: I think marketing has kind of moved away, where they were before talking about the upcoming artist, whereas now they like talking about the performance of the garment, rather than the lifestyle, which maybe they thought our customers had before. I am not 100% sure, but I think our age range is now from 24 to 28, whereas before they were a bit younger. But in design wise, I mean I have only worked on previous design, but from what I gather, we have changed from how we design a garment quite drastically. Like we have to consider now whether I should add detail at the back; if that is going to have a purpose or a function, or whether it will be uncomfortable. So if I did something with a big tie neck, which we probably don't do now, as it might seem a bit twee, but if it did, I would have to consider whether it would get on your way when you have got your hood on,

so it's really looking at the end use of the garment now, rather than oh it look nice, but we have to consider whether it would enhance the garment or is it going to make it harder to wear.

INTERVIEWER: so your 24/7 range/brand message, would you say that is looking at professional consumer profile, or others?

PARTICIPANT: I think they are kind of saying that its not someone who sits on a desk, they have obviously got some money to spend, they are not students but they are kind of communicating, and are young and stuff. I think they are probably in still creative stuff, like the probably will still go to exhibitions and stuff. They have kind of that 24/7 life, but probably not got kids.

Company C2: Senior Designer

INTERVIEWER: Can you please first tell me your role?

PARTICIPANT: I am a senior designer. So I look after woven dresses. Sorry, look after all the dresses. But I look at woven as a category, and knitwear and bottom and trousers. So I look at all the bottom, trousers, and skirts.

INTERVIEWER: So how long have you been in this role?

PARTICIPANT: About three or four years

INTERVIEWER: So can you tell me a bit about what your role involves?

PARTICIPANT: Oh gosh! Because different things are happening all the time, it's kind of difficult. I mean generally, we do a lot of research and then we kind of split the design team to do different research. Like the way we did it for this season, we split the designers into several groups, and some designers researched the detail that they felt was important, while some designers researched the colours, some designers researched the overall silhouette, and then we all get together and kind of presented the ideas to each other. And then obviously we all found little bits of each other ideas, which then become a nice bit of discussion. It was quite a nice project within the office, over the last few weeks. And once we have initial ideas and concept of how we want the season to work, we then put together boards and images, and then the head design and the design manager would show the agents, because we have agents from all around the world. Because we sell products in quite a few different countries, we have agents representing country in each area. They would then give us feedback on how they generally think it fits with their country. Because what you might find is what Germany wants might be completely different to what Spain wants. And then, when they give us feedback, we need sometime to take on board and edit things according to those feedbacks. And then it's just really a matter of designing the collection and showing them to the head of design, so she can give us feedback and things like that. So we try working together as a group so that we have got certain features that are pulling together, and then at the same time, we have got fits going on from the previous season. So we are always fitting the initial samples that are coming.

In previous job it have been my role to send comments back to the suppliers, but in here we all have job like a garment tech who specializes in each area. So they will write the comment and send it back to the supplier. So our garment techs would look into making sure that the labels are into the right place. A lot of times we would go to them and say we want a dress but in a certain way and then you are not always quite sure how to cut the patterns and the silhouettes.

INTERVIEWER: You have previously touched upon colour, market research and all, and you have also talked about mood and sample board for a particular market, so when you do your design, are they inherited from somewhere?

PARTICIPANT: I would say it's more of our own. I have worked for customers in past, like suppliers and all, for clients like arcadia and River Island and all; it's quite different when you work with something like that. Because you are looking at catwalk trend and influences like that, so you take little detail from here and there and try to incorporate them into yours, and then have aesthetics that has to be comfortable. A lot of it is looking at our own heritage and design features, and at the beginning of the season we try to have it non, see how it feels, and that hold needs to be moved down a bit, or maybe that hold needs to be constructed in some way. So almost finding what is not perfect about our own garment, and about other people, and sort of how to perfect them. So we kind of put together a little mood board about what we are, and what we are looking at. A lot recently, what we were saying were that a lot of our customers are not really a niche customer, it's like an everyday customer. And a lot of what they are doing is exploring the city or the country. So it's kind of looking at things from an explorer point of view, like vintage clothing and utility/function, and how that can be modernized. But also, modern day utility pieces, or maybe ski wear and things like that, which may have a very cool pocket. So it would be quite a performance jacket but working them in an item that isn't really a performance item. And then just looking at general things like clever designs for the city, we looked a lot of little things like really cute compact storage

solution. I mean they were just like pieces of furniture that could add storage solution, but they could actually become a pocket.

INTERVIEWER: So you have just mentioned about the durability and the performance of the products, would you say (COMPANY C) is focusing more on the design of the product, or would you say its focusing more on the brand?

PARTICIPANT: I think it's always got to be a bit of both in every company, but its knowing who you are, as there is no point advertising a brand that has no meaning anything. So it's like knowing who you are as a brand, and what you want to shout about, and I think, if you are doing so much shouting out about your brand and your product isn't right then, so for us it design obviously, as that is what we are focusing on. Designing the best product we can. And then we have a marketing team on the other side, which you know is looking at marketing. So we all support each other.

INTERVIEWER: But (company c) as a brand would you says its looks at more into designing a product or brand?

PARTICIPANT: I would say that the product comes first. When we first looked at what our products was about we said product is important, that it has got the level where it looks really good, and stylish, but is equally functional, we don't just put on the detail for it to look nice, the detail is there for a reason. Whether it's comfortable or warmer, or easier to move in, it's not just there because it's a fashion trend; we do it because it helps you. But then it shouldn't look tacky, so it's getting that balance.

INTERVIEWER: So when you have agents coming over from all over the world, do you sell yourself to have British association?

PARTICIPANT: I think it's quite important that you don't go into a German store and see a completely different design to what you see in UK store. Obviously, Canada might say it's colder here so we need warmer things, but you never look at the product and say oh that is not what I expected to see. So it always, I mean it's quite important for us as a brand to have our own identity, rather than it get diluted for different market.

INTERVIEWER: And do you still keep that British identity in your brands or products would you say?

PARTICIPANT: Emmmm. It's not something, I mean we have obviously got that element that we come from Manchester and we have had some musical and British references and things but I don't it's something we shout about, perhaps not as much as we have in past. Now I think its focusing much more on designing good products.

INTERVIEWER: But would you say that there is particular kind of feel you are trying to give to your design though?

PARTICIPANT: Yeah, I mean at the beginning of the season we all have quite a pacifically talk about what we want to have as our seasonal identity. But I think generally we want things to be quite clean, nothing too cluttered and bright, but you also don't want to feel too cold and dark, so it's getting somewhere in the middle. So I would say pretty much quite clean line. One thing that is quite important to our brand is that we are always very comfortable and cozy, and a lot of our little features, like our neck line and other features, although they are there for a reason like the warmth and protection, like you feel very secure and cozy, and I think that is an important element to us - that we don't want to lose that, basically the softness of the product.

INTERVIEWER: In terms of your company as a brand, what type of brand would classify it as?

PARTICIPANT: I would say premium brand, I think there is an expectation that you buy high street pieces, but to me it's a little bit like a throw away. As a customer you buy them and want them to last, and that they are much better made.

INTERVIEWER: In general terms, would you class your brand as a retail brand or a wholesale brand?

PARTICIPANT: We sell our brands in retail and wholesale, so yeah department stores as well. As a business I wouldn't know the main focus of the brand, but I would guess we sell more; wholesale, because we sell worldwide, and we have stores in certain countries, but I wouldn't know the strategy moving forward.

INTERVIEWER: and what other places do you sell your product at?

PARTICIPANT: I think there is Doctor Klugo, it's like a small indie shop, and I think we are trying to be quite focused on where it is being sold. So they are small little Indie shops than a department store.

INTERVIEWER: In terms of retailer, are there quite a few outlets out there?

PARTICIPANT: To be honest, I don't know number of the top of my head, but we have quite a lot. About 15 to 20 within Manchester surrounding area maybe, but I am not certain.

INTERVIEWER: And would you say your brand collaborates with any other brand in their retail outlets?

PARTICIPANT: No, not really. When we have done collaboration in past, it's been more with festivals and things like that, rather than other stores.

INTERVIEWER: Could you think of any reason why you don't collaborate with other brands and stores?

PARTICIPANT: To be honest, on the top of my head I don't think we did, but if we were to it has to be a right match.

INTERVIEWER: Are you talking more in terms of combine products?

PARTICIPANT: I think for us, when we talk about independence store that have similar brands as us. This is because that's where our customers shop and that's where they can get our products. We are not like arcadia, fitting in other stores. A bit in catalogue like shop directs. This is probably because when you look at our competitors - that is where they fit in. Like when you look at shops in shop and like concessions, you are generally picking up another brand to go with your products, so like Dorothy Perkins. If someone goes in the store to pick up Dorothy Perkin, they may then pick up the concession product to go with the brand. I think independence is where we are much more focused.

INTERVIEWER: you have previously touched on colour, design and etc. Does any of that have association with its British heritage?

PARTICIPANT: No, I don't think that's even a part of a thought in any context of design. So it's not an important element of a brand anymore.

INTERVIEWER: So now can you tell me what do you understand by the term country of origin?

PARTICIPANT: That is where the garments are created or produced. I would never; as a designer would know that the fabric isn't necessarily from the country where garment is made. But I think some consumers might expect it to be.

INTERVIEWER: So when you talk about products, would you say it's the entire garment, or would you say it's the parts.

PARTICIPANT: I would expect it to be the entire garment. So obviously you would have, I mean we have our jeans made in Turkey. But we control all our accessories made in China. The reason they are made in China and not turkey is because we can have this control, so it can't be counterfeited with a lot of factories making buttons and things. We prefer to make buttons in our own factories, so we would then send them off to other countries, for example we have our denim made in Turkey, and we send our denim buttons to them. So, they would manufacture our product and add the buttons in Turkey. So yes, different components can be made in different countries.

INTERVIEWER: So in your products, would you say the components are made in different countries?

PARTICIPANT: Pretty much the whole garment is made in which country it is originated in. it's just the accessories that would get shift from China. When I accessories that would be buttons, labels and this would only be so we can control it, in terms of not having factories, just so it all comes from the same place. I mean we would never send half the jeans in China and then send it somewhere else. I mean it's only the buttons and label. The actual garment would be made where it says it is made.

INTERVIEWER: What about the fabric?

PARTICIPANT: We get fabric from all different places like Korea, Vietnam, Turkey, Italian fabrics, and if we use a special fabric, like in denim if we use Italian fabric, then we would shout about that and say this is an Italian fabric, but

it's clear that where it is made is on the label. But of course it's not always real, I mean sometimes we use a really nice fabric and not shout about it, it depends.

INTERVIEWER: and when talked about the Italian fabric, would that be related to the construction of the fabric or would you associate it to the yarn?

PARTICIPANT: It would just say, because we don't want to over complicate the message, it would only just say made with Italian fabric, for example made in turkey, and made with Italian fabric.

INTERVIEWER: and what do you mean when you say Italian fabric

PARTICIPANT: My understanding to the Italian fabric would be associated with where the yarn comes from and where it's put together.

INTERVIEWER: How important is country of brand origin in your company?

PARTICIPANT: In our brand, we are looking for the best fabrics to do the best job, to the right prices. I would say that the whole brand is focused on the product, rather than shout out about the brand being from Britain. So it's like saying country of origin isn't important to us, because what is important to us is getting the best product out.

INTERVIEWER: So would you say the parts are probably more important than any other components?

PARTICIPANT: Yes, finding the best fabric we can use is probably most important to us.

INTERVIEWER: Which dimension do you think is most credible and effective in your opinion?

PARTICIPANT: As a consumer, to be honest when I design products, it's just about creating the best products, it doesn't influence me which country anything has come from. I don't think it even goes in my thinking process. I also think it's an open question because country of origin is so specific to your brand; everyone's promotes the brand in a different way. Someone like bell-staff would shout out about the country of origin, the importance of their heritage, but I think at the moment there is a huge movement in design for a definitely made in approach. if you look at Marks and Spencer, they have a made in England collection coming out and thing, so I do think there is a definitely an awareness of it, and I think there is an awareness from consumers point as well, but I think in terms of price you sort of... from the things that I have read, people aren't always open to the fact that they have to pay more for things made in UK. When Marks and Spencer item first went online, I thought that it was really lovely, and they obviously took the cut in the margin, to get it out of the prices to get it made, and then I know some people were still thinking "oh that's an expensive for a pair of shoes". So you know, it's quite difficult for retailers to get a balance at the moment. But I wouldn't necessarily say it was important to all brands and stores. Like Marks and Spencer, it's good for them to get it out, because they have a British historical heritage that they want to shout about. But from a designer point of view, I would say that for (company c) the components of country of origin don't matter at all, I think it's just a matter of places where you can get the best part for whatever you need it for.

INTERVIEWER: I was going to ask how important or not do you think country of origin was within the brand and its product? And/or how would you describe the relationship between brand and product.

PARTICIPANT: I think what is important is that you are responsible for where you source your products from, I mean your factories. And I think it's important that a brand is working with factories that have the right control; so there is a responsibility from that point of view, definitely. But I don't think it's necessarily something that a brand should be shouting about. I think that is just something you as a brand should be doing, you know that no one wants to harm anyone when creating products, but I don't think you need to shout about that, it's just a responsibility.

INTERVIEWER: What do you think is a different between a brand and a product, according to your understanding?

PARTICIPANT: A product and a brand should be the same. I think you have a brand, whereas a product is doing something else, and if your brand message is something else, like is there is a difference, then to me that's quite weak. A brand

message and the product should do the same. Like design and marketing, we are working in different departments, but should be working together.

INTERVIEWER: What does (company c) say about the brand, or is there a particular message?

PARTICIPANT: Do you mean in terms of the name '(company c)', the message is quite different to the brand name, because the name came from when the guy first started it, and he was heavily into skate boarding, and he started by selling T-shirts and skate board, so he choose the name '(company c)', because he used to skate board on the (company c) of Manchester. So originally that is where the brand name came from, and that brought quite a skate and niche culture to it. However, in that way, what we have become now is quite different, because the brand has evolved. But this is how it was in the 80's.

INTERVIEWER: so the brand message.....

PARTICIPANT: It's really about multi-purpose clothing, that can take you anywhere, and you won't feel uncomfortable. So you could wear a jacket, and go hiking in it, you could also wear the same jacket in the pub and then walk out in that.

INTERVIEWER: So do you carry out research in brand perception?

PARTICIPANT: Yes, we have done in the past.

INTERVIEWER: And what would you say are the results, and how is that used to develop branding strategy?

PARTICIPANT: Emm, as a designer we are not actually made aware of such things, but it's probably influences on how they market things.

INTERVIEWER: And how would you say it might have helped in developing brand strategies?

PARTICIPANT: Yes, it's not something I am quite involved in. it's quite a big department, so we are all involved in certain aspects.

INTERVIEWER: What do you think are the core things that impact the brand image?

PARTICIPANT: I think its advertising, social media and sponsorship.

INTERVIEWER: and would you promote the country of the fabric or parts, and how do you think that impacts the brand image?

PARTICIPANT: As I said, It's not something we feel like we should mention, because if it's a really nice fabric, and we shout about it to make people aware of that, or we do some fabric that have tinsel in them, so that feel super soft, it's more important to us that we shout about the properties of the fabric, but country of origin isn't as important, as long as its ethically.

INTERVIEWER: So you don't think the image of the country impacts the brand image then?

PARTICIPANT: Not to our brands, No! But I think it depends on your brand message, so obviously someone like Bell-Staff or Mulberry, country of origin is part of who they are, and what makes them, them. Whereas for us, we are not about where we are from, it's about customers, what they are doing and their everyday life.

INTERVIEWER: Could you please tell me whether you think your consumers might have any emotional attachment with (Company C) as a brand and/or its origin?

PARTICIPANT: Possibly, consumers that have grown up seeing (Company C), and who obviously remember company when it was over the Manchester scene, and things like that, would have infinity to it.

INTERVIEWER: Do you think there is any part of (Company C) as a brand or product that tries providing consumers that emotional associative feeling or not?

PARTICIPANT: I wouldn't say there is a specific strategy.

INTERVIEWER: So do you have an online or catalogue service?

PARTICIPANT: There is shop direct which is basically a catalogue company, and they sell some of our products, and we do sell it online in that way as well. We also have our own website, where we sell our stuff.

INTERVIEWER: Is there any way you use country of origin in those services?

PARTICIPANT: No! In the past, we did use to have stores that had the Manchester skyline and things, so it's kind of like we displayed in store and then we also used skyline on t-shirts and things like that, but we seem to be moving away from that, I think it's just become less what are message is about really.

INTERVIEWER: and how does a brand message impacts a brand image?

PARTICIPANT: I think it influences every area, our tagline is about multi-purpose, we constantly go on about that, and as a design team we go back to that and look at what is this feeling about. And against other areas, they are always checking this.

INTERVIEWER: So with reference to multi-purpose, do you have a particular city in mind when you are designing?

PARTICIPANT: The idea of this is that it can take you anywhere, so to think about it from a particular city would be almost be a wrong message. It's almost the opposite, you are not going to look strange wearing this in any city, feel nice, and a lot of clothes have lining and that you can take out. So if you are somewhere, where you are hot, you can take the lining out, and if you are somewhere cold that you can put it back in. it should just adapt it anywhere in the world.

INTERVIEWER: So what inspires you to design when you are designing?

PARTICIPANT: Everything is just so much more global now, I mean from thinking about me and my friends, we travel all the time, like to berlin, New York, Bali, it's like to varies, and I am thinking like of that kind of consumer. So this is why I said, I would probably be thinking about someone who is travelling, and is quite adventures and want to go all over the place. I mean my brother and his girlfriend at the moment are travelling, and so I think a lot about them when I am designing. So thinking about them having a little rucksack, and there are only so many clothes that they can take with them, it's got to do so much, and they bought nice pieces before they went and it lasted. So it's that thing off, it's that precious and had to do a lot of things in every way.

Company D: Buyer

PARTICIPANT: I am a jersey buyer, and have been in the company for three months, but been in the industry for 9 years. My role is that I am a buyer, and we will source collection, we have about four collections a year, which is seasonal, S/S and A/W. But within those we have what you call transnational access as well, so that is broken down to spring/summer/autumn and true winter. So we buy four collections a year, and with jersey, we source our fabric wherever we can get them from. So basically, we source from various countries, based on their expertise, price, qualities that we can get there. For example, on woven, if we wanted some heavily embroidered products, then that is known for Indian products, and if we wanted, for knit wear there is a lot that comes from China just because they can source all the yarn. So that is why we source from all different places.

We work with designer in the design team and it's always side-by-side kind of partnership. We design the range, we analyse per season, we analyse sales, and making sure we are following what customers are buying into. We will do trail style as well - so that we can get sale, move new things, and we will work and then we will buy them, what we call bulk order. So we are constantly testing what our customers like.

INTERVIEWER: What type of brand would you classify yourself as?

PARTICIPANT: We are a very particular customer brand. We are not very much like to Topshop, which is like high fashion and need speed, and constantly follow the cat walk. We do follow cat walk, but it's very much associated to what are customer branding likes.

INTERVIEWER: What kind of brand would you label yourself as?

PARTICIPANT: Yes, we label our self's as a premium brand. So quality and appointed differences to the high street are important to us. We are a very a print led brand, and we like our prints to be exclusive to us, which is why we have an in-house designer, doing that, and we are only just do womenswear, but it's from around different ages, probably from around 30 up to, but core customer are around 30 to 50.

INTERVIEWER: And you class yourself as a retailer or a designer?

PARTICIPANT: Yes, we are a retailer, but we are a designer led retailer.

INTERVIEWER: But would you say a retailer or a brand?

PARTICIPANT: A brand, defiantly!

INTERVIEWER: And can you tell me a little bit about retailing and branding?

PARTICIPANT: Yes, of course. Ok we are a heavily design led. We want to produce our own products that are different to the high street, with our concessions. We are still very much treating it as our own; our own managers go in there and manage the concession. It's a brand that we want to keep together within let's say Debenhams, we want to feature in there, we don't want to be with Debenhams we are a brand, and we want to keep it that way.

INTERVIEWER: So as (Company D), would you say your focus is more on retailing or wholesaling?

PARTICIPANT: Retailing, we trade, we retail, its reactive, definitely a retailer.

INTERVIEWER: And do you think the shift of retailing into wholesaling had any implication on managing a brand in any context?

PARTICIPANT: We have grown massively in the past 30 years; even in two years ago we have grown hugely, and that is mainly down to our brand, how strong it is, how we keep building upon this brand, becoming different from everyone else in the high street, really trading being flexible, reactive and what's working and what's not. The way we have grown is expanded through concessions, and international, but that is still under our brand identity.

INTERVIEWER: And when you say brand identity?

PARTICIPANT: Everything is [brand name], the logo, packaging, everything, nothing becomes anything else, when we are selling it. And within the brand it's about customer's experience, and the product quality. Our customers know what they are getting, and it's no of surprise, it's the whole atmosphere, the store layout, the way we look. So it's a whole package.

INTERVIEWER: So when you have gone into concession, how are you managing that?

PARTICIPANT: The same way, the packaging is the same as (Company D), we have our own logo, any sign on POS which we call them, they are all photographed by us, they are all our own products, even our fixtures and thing, they are all ours. So we are maintaining our, so if you walk into concession you will feel like you are walking into our store kind of thing.

INTERVIEWER: So do you have any implication managing the brand in concessions, or not?

PARTICIPANT: Yes, because the managers are employed by us. And we have our area manager visiting and looking at the store as well, so it's all managed through as.

INTERVIEWER: So when you set yourself in concession, do you sit with other premium brands or?

PARTICIPANT: Yes, we set ourselves with premium brands, we have Hobbs, Jigsaw, Reiss but that is more in House of Fraser, and within Debenhams it's slightly different because they don't always have them. So it depends where it is, but this is how we position ourselves.

INTERVIEWER: So what is your understanding of country of origin?

PARTICIPANT: It's where you sourced and made, or make your product; I mean the production process.

INTERVIEWER: So what does country of origin mean in relation to your brand?

PARTICIPANT: So we would always make sure that we are ethically sourcing, we are obviously after the premium product as well. So we are dictated to where could or couldn't source. For example, knitwear comes from Bangladesh because that is much more basic product. You wouldn't get premium fabric from Bangladesh, so we have to go to China to get a bit more premium products, and so, it various according to our brands need.

INTERVIEWER: Now that was more from a product context, how about your brand, for example English association?

PARTICIPANT: Because that is the only place you can get them from, there is nowhere to source from in England anymore. Years back there was, but currently in the industry there isn't anywhere for premium products, So for example in jersey, we might make products in Turkey, or anywhere in Europe, but if we have any particular lace to source, that would come from Far East or China, simply because these countries that we make from, and this is how the whole industry works.

INTERVIEWER: and do you maintain the British brand image? Or is that not considered that important to your brand?

PARTICIPANT: No, I would say it is important. Although, I am a wrong person to ask for that, at this stage, I have not been in the company that long enough, I think you need a brand director for that.

INTERVIEWER: But in your opinion what do you think?

PARTICIPANT: Of course we have to look after our heritage; we are an English brand after all.

INTERVIEWER: So do you use country of origin in your products or store experience?

PARTICIPANT: Do you mean whether we fly 'Made in England'? I don't know from a tidy area of other product categories, I can only speak from jersey area, but no we haven't.

INTERVIEWER: But when you are positioning your brand in Debenhams, and placing it beside other English brands such as Hobbs, Reiss, what's your say on that?

PARTICIPANT: I don't think it's deliberate.

INTERVIEWER: How important is country of origin to you as a buyer?

PARTICIPANT: So, I have said ethically we need to be careful, that is how important it is as a buyer. Wherever we source, we wouldn't source from any country that is known for third world country, and under paid, that is important to anyone as a brand and as a buyer. In terms of other sourcing, there is nothing really, as long as we feel like we are supporting the area, there are no other issues, but that is just product led. So product and brands are 2 in 1.

Again, in the beginning I said that it depends on what you want from your range; we have some jersey, some linen jersey, and we can get that from one particular country. we have some printed jersey, and that's again, there is a specialist country for that, so it really dictates how we want to build the range, and then how we feed it out into different countries, what their expertise are, what can be sourced, how good that country can print and not.

INTERVIEWER: Which dimension of country of origin is most credible in your opinion?

PARTICIPANT: Country of Manufacturing is important; it's almost a legal thing. We are just a so established known brand that we don't need to. People known us in the industry, and know that we are a well-known design-led brand, but for customers, I don't think its important.

INTERVIEWER: And would you internationally emphasize about the origin of the brand?

PARTICIPANT: Internationally, we do such things; we do sell in such places. International expansion is very new to us, but it's well established as a brand.

INTERVIEWER: Do you carry out brand perceptions?

PARTICIPANT: Oh yes, we always have customers perception, store visits, focus groups, afifa, and what they say about the brands and the product.

INTERVIEWER: And do you think COO impacts the brand image in any context?

PARTICIPANT: No. Sorry, I have to go now.

Company E: Store Manager

INTERVIEWER: Could you firstly tell me about your role, please?

PARTICIPANT: store manager of (COMPANY E) in Manchester Armdale.

INTERVIEWER: Okay. And how long were you there for?

PARTICIPANT: Eleven years.

INTERVIEWER: Can you please tell me what does your role involve?

PARTICIPANT: Uh, being involved in the operational side of the store. So managing staff schedules and ...KPI focuses.

INTERVIEWER: Could you please tell me a bit about the KPI please?

PARTICIPANT: Yeah, so it's focused on, like, your conversion, so how many customers we convert per day. Your average transaction value, so how many...the average price point a customer will spend. Customers we convert per day. And then with a UPI is a unit per item, so how many customers have purchased a different quantity of items.

INTERVIEWER: and does this have any involvement with marketing?

PARTICIPANT: Not really, no. Well it can be. If you have promotions on.....and things are having discount and stuff, or we have a promotion like 'buy one, get one half-price'.....there are more people buying more products and stuff so it can work both ways, to be honest. And then your wage cost is another one so...

INTERVIEWER: Wage cost?

PARTICIPANT: Making sure your wages versus sales is in-line with the COMPANY figure. we've got the recruitment side, and also dealing with different brands. So it was very diverse and we had to make sure we were in-line with the different retailers. We had to make sure we were meeting their standards.

INTERVIEWER: So how would you manage that...a bit more about brand management?

PARTICIPANT: It varies on making sure that the brands are sat with the same...family. So for example, you'd have G-Star and these are very denim-oriented. So they would have to be a part of that family. You'd have your lifestyle branch, like your weekender... That's another part of the store and maybe sports brands, Nike, and then you'd have your more price point brands ...and sometimes your [unclear – 0:04:50.0] brands, like your Soviet.

INTERVIEWER: and could you please tell me a bit about company's history and how it has evolved?

PARTICIPANT: Well (Company I) went through a transitional period where it was more of a lifestyle brand. Back in the 2000 era they were more towards like a late stage between 2000, it was coming into more of a denim-focused brand. They wanted to be the destination for denim. For their all-year clients who go for their denim, and they founded a new denim culture and created these denim brands...in the store and that was basically the key focus, so that's kind of more their...what they're best at. And that's where we've had to try and get the brands to come on board, like Diesel, G-Stars, other branded retailers like your Levis, your [unclear – 0:06:00.8]. So they're really starting to bring these history of brands into the present day...and making them focused, so that's where (Company I) see as their main focus and then over the last five years they've still made that focus but they've got more into the [unclear – 0:06:17.0] side of things. Which is where Sports Direct has taken over. And that's been more of the likes of JD and your [unclear – 0:06:24.0] and your Foot Lockers, so it's not like you're catering for different market.

INTERVIEWER: So what kind of retailer would you say your company is?

PARTICIPANT: (Company I) was trying to create that whole [unclear].....where it's a retailer with different brands within the store. So it wasn't a place where you go for a (Company I) brand. It's more for a choice of brands, but now we have quite a few own brands now. Yeah, we have Soviet, which has been around for the last fifteen years. And then they started blending with Republic.....who brought their own brand on-board, Soul Cal. A (Company I)-

owned brand. And they're...for ladies' wear, they are the Soviet and we also brought out Firetrap. So even though Firetrap is a brand to the customer...it's now manufactured as an own brand. So that's where we can do the margins, profits, take care of that stuff. Because we're doing all the marketing, we're doing all the manufacturing side of things so there's not that third party cost to pay for.

INTERVIEWER: Yes, but firetrap launched its own retail store?

PARTICIPANT: Yeah, (Company I) are funding that. So when you say they come to own it, if (Company I) are supposed to be...so the money that Firetrap's going to be earning... Basically we own the rights of Firetrap...so when we want to market down or put promotions on or we want to try and put that in House of Fraser, [unclear – 0:08:47.9]...we have the rights to do that. We don't have to go through any third party or authorisation. It's just (Company I)'s own rights.

INTERVIEWER: as part of your brand, do you not think Firetrap is going to develop its own brand image?

PARTICIPANT: Yeah, I think it's true basically. We're trying to give it more independence than all the stores.....but it's still trying to do that...it's got that history with Firetrap. It used to be [unclear 0:09:16.7] but it's now about the nature of Firetrap [unclear] different to either. The feeling inside (Company I), we know the background of it...and how it's working now. You know, we do pass that brand in terms of the [unclear – 0:09:28:0] with it. Yeah. We can have the ownership of making the designs on that and how we want to work it with the markets. So what'll happen is now (Company I) have got its own merchandising team for Soviet Soul Cal. The merchandising team there was originally working for Firetrap before (Company I) bought it out. They're working for (Company I) now. So the merchandising side design the product and (Company I) have the ownership of that and the rights. So again we manufacture that through our own manufacturers as well, so like Soviet. So Firetrap now is manufactured the same as Soul Cal and Soviet. It's just got a different label.

INTERVIEWER: So where is the manufacturing based, and the design elements?

PARTICIPANT: South Asia does the manufacturing but it's all marketed and all the designs are based in London. And that's the same with Soviet as well.

INTERVIEWER: Okay, and can you tell me whether you understand the difference between retail and wholesale brands? The participants did not understand, so the differences had to be elaborated.

PARTICIPANT: Um, River Island, Topshop, they kind of fit in this retail brand, retail side. Whereas kind of maybe more on the manufacturing side. Or used to be.

PARTICIPANT: Is that what you mean? Like River Island.

INTERVIEWER: Yes. Can they be regarded as manufacturer though or are they just a retailer?

PARTICIPANT: They're probably saying they're more retailers, to be honest. They're for more retail trade. Okay. It's 'cause we've got ownership of all the other brands in-store. So that's their biggest market. That's their own brands. Is that what you mean? Like Soviet, Firetrap, Soul Cal are owned by (Company I).

INTERVIEWER: and what type of brands would you say other brands are, as they are not owned by you?

PARTICIPANT: Personally it's independent. It's because we don't own the rights to that brand. Even though they, like, buy the product from that retailer, it's still...the retailer's rights. We just have it in our store as more of an advertisement.

INTERVIEWER: Yeah. So would you generally give them the label of 'independent brands'?

PARTICIPANT: Yeah. Cause even though we have back stock in our store, we don't have the rights to say what we want to do with it. That all comes from the independent retailer, where, like, we're going back to our retailer brands...we can do what we...ignore the...we have the rights to say what we do with that.

INTERVIEWER: so has your company always been wholesale brand focused, and just started own brand strategy, or was this always your company focus?

PARTICIPANT: Basically with (Company I) they try to lose the wholesale brand. They try to come away from it 'cause that's how they...they want it to be exclusive and kind of sit alongside [unclear – 0:14:54.0]. So they had to...what they've done now with (Company I) is accepted there is another brand – it's our own brand. It's a cheaper price point. So they're not scared of advertising now. So it's more like they're the senior brands of the manufacturers...and this is more like the price point for the retailers.

INTERVIEWER: The benefits of own branding retailing and how does that differ, if so, with promotion and etc?

PARTICIPANT: we've got to go through the other retailers. So we would go into a sale, for example...we can just go and reduce down in a sale. They've got to...they've got to say that we can do that. So they would have exclusive rights to [unclear – 0:16:40.0]. So that's where you have the luxury of your own brand where you can kind of mark it down at any time of the season. Where with your premium brands, it's only at certain times of the year. In terms of, like, the merchandising, development of our own brand, sometimes we'll get in with fashion trends and stuff...you can go with ideas sooner rather than later where with a premium brand that you're buying into, you've got to hold that brand's collection. Where we can...we see a trend that's coming in for that autumn/winter '15...we can start making that as and when, where [unclear – 0:17:22.0] retailer...[unclear] or they've gone with that look. That's the luxury of having your own merchandising.

INTERVIEWER: and obligations and others impacts in terms of wholesaling....

PARTICIPANT: even though we've got a collection of G-Star and a collection of Diesel, we only buy into them as (Company I), but that comes with obligations and regulations and strict guidelines. So we can't really move from that, otherwise they can lose their rights on that brand. They could pull that brand out of our store. So that's where if we've got an issue with managers, then we have strict guidelines and we work to the branded [unclear – 0:18:45.0]. Cause we go to Diesel store...they have it a certain way, the standards are a certain way and that's how we've got to be in our store even though we're (Company I). We've still got to look at that brand and take it as a retail brand, whereas our own brand, if we want to take an issue to our head office, we've got to manage that quickly as well. So [unclear – 0:19:11.0]. When you walk into a (Company I) store, you start off with denim brands and you get that retail, exclusive look. And as you get further and further into a (Company I) store, you might see our own brands, and that might be marketed with a lot of discounts and price offers and a bit cheaper price points.

INTERVIEWER: And are premiums making more sale or just generally overall, would you say it's going more towards...

PARTICIPANT: To be honest, your own brand. Probably as the price point, whereas people might buy the cheaper price point in denim...but then buy a higher-end Diesel T-shirt. So it's kind of different marketing but you do get that clientele who enjoy...the G-Star customer. And that's all they go for, so...but I do say every retailer, independent retailer now, you know, like your (Company I)s, your JB's, where they have different brands in their store...they've got to be at that market where they have the cheaper price point, multiple price point offer.

INTERVIEWER: and what do you think are the differences between marketing wholesale and retail brands

PARTICIPANT: It's gone a bit different now where if it's your own brand and you've got the rights... [unclear] where sometimes you're purchasing premium brands... with (Company I) that comes from the brand itself, so our head office retail, their head office, whether they want to market it. And that's going back to what I'm saying about, you know, the terms and conditions. When working with (Company I), when (Company I) want to put a promotion on... we've got to go to each of these brands and say, like, 'We're doing a promotion on these. Do you want to get involved in it?' And it's down to them if they want to say yes or no. So they might have some lines within their collection that are not doing that well and they'll put them at a discount price because we have no authorisation to start marking down their price point.

INTERVIEWER: So how does having different level of brands, i.e. own brands (high and low) and other premium brands impact the overall image?

PARTICIPANT: Really that's all down to the manager, really. In terms of how you...your own expectations, and from a head office point of view, they want to keep that luxury...of giving an exclusive look. But from making a profit and making a success of the store, you need to make sure you've got that engagement with the customer...to be able to offer that different price point. But by doing that, you still need to make sure you keep a [unclear]. As much as possible. So it's when you're marketing your cheaper price point...it's how we merchandise that, how we market that to make sure it still stays in the premium look.

INTERVIEWER: so having other premium brands in a store, how does that help?

PARTICIPANT: It strengthens the brand. You know, like Soviet's been around for the last fifteen years so...even though it's a cheaper price point, it's still probably an established brand the same as Diesel. So again, it's how we market that, how we've marketed that over the years...to get that out there. And it's only been over the last five years...which has been more of a marketing down, multiple offer brand where when that first got introduced, it was brought in as a roll down. Still seen as an exclusive family 'cause it was nowhere else...and there was no discounts, no marking down. So probably for the first five or six years of that Soviet being with (Company I), it was seen as a premium brand, just with a cheaper price point. So it didn't really have that [unclear – 0:24:40.0] until the last five years where we started to have tickets on everything, price wars and everything about price. So it's been allowed to establish itself over the last ten years.

INTERVIEWER: Can you tell me what do you understand by the term country of origin, and what is country of origin of your products?

PARTICIPANT: I'd probably say they're Asian. Where it's manufactured more than anything. That's where we do a lot of our standalone brands. And then obviously our more premium brands, they have their own manufacturers, like G-Star, which is based in Amsterdam, Diesel would be in Paris, I think it is.

INTERVIEWER: But when you say 'manufactured', are you saying where...what part of manufacturing? Are you saying where the product is produced?

PARTICIPANT: Yeah, where it's produced.

INTERVIEWER: So G-Star...and is this where...is this where the products are assembled?

PARTICIPANT: Yeah. That's where the warehouse is as well. So I'd say the country could be... where they do everything, from tailoring...

INTERVIEWER: In the head office?

PARTICIPANT: Yeah, in the head office. They produce it in the main head office there. They do all the...where all your marketing team are, where all the [unclear – 0:27:51.0] are. That's where all the manufacturing are. The shipments are all set. Some retailers, like, you know, (Company I) have a...we're based in London. Where our own brands... And then we have our product where it's [unclear – 0:28:17.2] is based in, um, Sheffield.

INTERVIEWER: And is that where it's manufactured?

PARTICIPANT: No, that's where it's shipped from. The manufacture of our own brands from Asia, that's where it's manufactured.

INTERVIEWER: From G-Star and all, would you say that they're manufactured more towards a ...

PARTICIPANT: Yeah, they don't have no third parties. They have like their own...when you're doing your own brands from, like, your own retailer.....you probably wouldn't go to a third party to make things cheaper or so you get a higher price margin.

INTERVIEWER: and your country of brand origin..?

PARTICIPANT: Oh, I would say it's English, I guess. That's where it's been established from.

INTERVIEWER: Yes.

PARTICIPANT: In 1988.

INTERVIEWER: ...what do you think is more important here? That it's been established in the UK or...

PARTICIPANT: Definitely. It's your own heritage so definitely in the UK. You know, I think that's like the loyalty thing. But [unclear – 0:30:20.0]. They're all Manchester-based brands. You know, that's [unclear].

INTERVIEWER: Ok, and which dimension do you think is more credible and effective in your opinion? I've already asked you this but why would you say brand origin is more credible?

PARTICIPANT: Where it's based from? It's the credibility of the values. You're Manchester-born...and you had a brand that was based in Manchester, it's something to be proud of. Something that you can really relate to. Where if it's something that's coming from, like, [unclear – 0:31:11.0], you probably don't have that same connection.

INTERVIEWER: so what is country of design of your brand?

PARTICIPANT: They're designed in London. Yeah, so that's where all the designs come from. They're all designed here. They take different ideas from different...from other brands, so to speak, or different fashion trends. And then they'll put our own collection together by utilising them designs. So obviously copyright [unclear – 0:32:25.5]. I think by law there's got to be, like, ten different changes. So what our designers will do, they'll go and see a collection that's really good, 'I like that idea,' and that's obviously like I said to you before, when we've only had Diesel, G-Star in our store, we don't always cater for that collection idea.....so that's where we have our luxury of our [unclear – 0:32 49.8] to that market and we've got to make sure when we design something, we change to that point of what we're taking ideas from.

INTERVIEWER: Okay, so in your opinion now, which dimension is more credible? So your brand Is it the 'made in', understanding brand image 'cause of the brand heritage, or what about the design's important? As store manager, what would you...

PARTICIPANT: I would think quality is the way to differentiate, where the product's manufactured.

INTERVIEWER: Where it's manufactured? So you'd say quality? Even though you're saying that it might be related to the heritage?

PARTICIPANT: You are giving the customer the best...service and the best product. You know, and they're buying into something, you know? They want to know the difference why a pair of Levi's jeans are £120 and the reason why you're selling a pair that's very similar...for £30. So the quality is still the most important part.

INTERVIEWER: and what would you say to the customers? So if you were to say what is the country of origin...

PARTICIPANT: The issue with that is, like, we're selling that price point. [unclear] still doing all the detail and all the stitching and, like, fabric. There might be a certain fabric a lot cheaper [unclear] price point...but I think it also shows in the detail, that high quality. So the customer, when they're buying into that, yes they're saving x amount of money, but they're still gaining quality.

INTERVIEWER: so are you saying that you got to consider the manufacturing price point as well?

PARTICIPANT: Yeah.

INTERVIEWER: so you do you think country of origin has any impact on your retailing business?

PARTICIPANT: Not really, no. I mean, I don't think that's the thing that...I mean, people like buy a pair of G-Star jeans, you know, like I say, I don't think if a customer's bought a pair of jeans...they just want to know that that quality is still the same. So that's why I always go back to that's why quality is important.

INTERVIEWER: So the importance of quality associated to where the product's been manufactured?
 PARTICIPANT: Normally they're not, no.

INTERVIEWER: So apart from the stitching quality, what are the elements that you associate with when you're saying quality is....?
 PARTICIPANT: It's more about just the technical side of thing and making sure the detail is right and, like, you know, uh, the buttons, the fasteners, the details, the labelling at the back. It's also making sure, like, [unclear – 0:37:32.0] is so important [unclear] do buy that. [unclear]. So it's making sure that...but I still see it as the same quality. I mean, I'm personally wearing jeans now that have got five or six years down the line so that's where the quality is.

INTERVIEWER: and how important or not do you think is the relationship between a brand and its country of origin in general?
 PARTICIPANT: So important. Just, like...so...you know, when you've got that connection with that brand and where it's originally from...it's to get the best service...it's a service point. To make sure that communication's there, that they're producing the best quality of product. As long as that relation's stayed and the expectation of the person that's buying...you know, their expectation needs to be established within [unclear – 0:38:35.0].

INTERVIEWER: Yeah. Okay, well if you take it from a service point of view, you mentioned that the country of origin of a brand is important, but then Soviet, which is an English brand...G-Star is Amsterdam.
 INTERVIEWER: Dutch, Amsterdam.

INTERVIEWER: Do you think country of brand origin matters among other foreign brands that are sold within your independent stores?
 PARTICIPANT: I suppose it can be because, Yeah. Is this like...these are more established brands. They probably have a longer history and a longer...established group of customers, you know? People trust those brands a little bit more...where you're bringing new brands in at a cheaper price point where it's manufactured...in a...probably a third-world country, yeah. You know, it does have that, uh...it doesn't have that trust in it. So I think people [unclear – 0:40:13.4] these English brands and [unclear]. They're a bigger brand and that's why [unclear].

INTERVIEWER: And do you promote company/brand as an English brand or an international brand?
 PARTICIPANT: We brought that as an English brand. There's a whole history lesson on that. That's where we tell the truth about where we started from, the heritage of it...and how it's evolved over the years.

INTERVIEWER: Okay, but you still think it's important to have that [unclear – 0:0:51.2].
 PARTICIPANT: Yeah, absolutely. I think it's that emotional connection with the customer is so important. It's important for brand differences; it's all focused on its on history.

INTERVIEWER: Um. So what impact would Soviet or Firetrap as an English brand have in an International (overseas) market...?
 PARTICIPANT: So lets say firetrap sells in an international country or international outlet in the UK, how...
 PARTICIPANT: What they're trying to do, what they've worked upon is...with Firetrap, even though we owned it...unclear – 0:42:24.4] is to not be seen as an own brand. To still be seen as A (Company I) or as an international brand. Like, they still want to keep that brand heritage and that brand history of what it originally was all them years ago...even though it's manufactured in...as an English brand, and I think that's where, you know, it's so important to give that integrity of the brand. But I do think that if (Company I) starts doing things like that, people could get confused with what that brand is. It could lose its identity. So I think if you're doing things like that, it's important to stay true to its heritage and its roots and what it stands for. And that's like what I was saying about putting G-Star next to sports brands. It loses its identity.....of what it is, so if you ask somebody, 'What kind of brand is Diesel?' 90% of them would turn around and say it's their own brand. And that's where [unclear – 0:44:10.0] like Firetrap, it would lose its identity. So I think it is the [unclear].

INTERVIEWER: Is there a particular methods to keep the heritage association?

PARTICIPANT: I think that would probably just be more from the marketing side of things.

INTERVIEWER: ok, so tell me a bit about the brand name, what does it stand for, and....

PARTICIPANT: Well (Company I) actually stands for United [...] Corporation. So even though it's stuck like that, that (Company I), you know, and that's where it's going from, like, the sports brand now, it's going more towards a denim together. Retailer, and then it shifted from, like, probably ten years' ago when it was more of a sports, more casual brand to a more denim retailer.

INTERVIEWER: and how has that had an impact on the brand image?

PARTICIPANT: I think we've become more premium. Yeah. And it has tried to identify itself as a more exclusive retailer, by adding its own different retailer, different wholesale brands as well. So its becoming more of an exclusive brands.

INTERVIEWER: you guys carry out brand and retail perceptions?

PARTICIPANT: To me, that's one of the (Company I) brand integrator. Making sure that the perception of each brand sticks to this whole history, and its own personality. And that's why it's so important [unclear – 0:46:39.8] exclusivity to make sure that each of your brands is managed differently. To keep it exclusive. And that's going back to like we do promotions and stuff like that. [unclear – 0:46:55.0] It's almost like working with ten different clients.

INTERVIEWER: Yeah. Okay. And then it say, 'what are the results/outcome of this research? How is this used to develop branding strategy for the future?'

PARTICIPANT: I think we work on our sales and our management. So they get our brand management sales report and then see how well we're performing...each month, each week, and then we'll reflect. we'll, like, do that on a Monday and then we'll work and see how we can...if it's something like expand that brand. and that's where if a brand's doing so well, coming up to each season...the company will buy more of that brand and expand that brand, to get their return on it and then that brand will stop doing so well, they might buy on a smaller scale. so basically the square foot in your store, you're already maximising each square foot of that, maximising the best of the brand.

INTERVIEWER: and do you have to send the results to the brands you are selling for (wholesale brands, I mean)

PARTICIPANT: Yes that's, you know, [unclear – 0:48:11.0] so that's something that's secondly...with the G-Star's own head office, the...you know, working, what's working. Being in Manchester, a lot of brands are based on...head offices are based in Manchester...so they get a lot of...retailers come into the store and have a general chat with staff and...find out what's working, what's not working and then feed that back to head office, to make sure we're bettering ourselves each season.

INTERVIEWER: So how do you think...and then you have people who know about [unclear – 0:49:22.4].

PARTICIPANT: I think they've got this perception of, like, things that...brands that are from third-world countries as not being as high standards as something that's from Amsterdam or...Paris and things like that. So it's almost like perception. So I definitely, I definitely think that affects a brand. And the label. It's almost having trust.

INTERVIEWER: So how different are...to consumers...what do you guys do to...do you guys have any input?

PARTICIPANT: I'd say we have...it comes back to brand knowledge and history. Making sure, you know, you have good communication between [unclear – 0:50:01.8] or...it's about being honest as well, you know? It's no good going to a pair of jeans and some are for £120. It knows...they want to know why it's so expensive. So it doesn't necessarily go back to where it's been made. It's the detail that's gone into that brand. How they wash, you know, it's individually made and you have something that's £25 and these are off the machine. You know, 100 pairs an hour or something. So it's making sure you have that knowledge of that, explain the differences.

INTERVIEWER: So what do you think are the differences between retail and wholesale brands?
PARTICIPANT: I think nowadays, no. I think they've kind of merged together because there's so much competition out there now, so I think [unclear – 0:51:31.2].

INTERVIEWER: Ok, is there anyway your retail store promotes country of origin in service or products?
PARTICIPANT: No I think now with (Company I), it's like all brands. It's gone more...international in terms of [unclear – 0:52:06.5]. You know, [unclear] and you know, people buy into...and it's doing that [unclear]. (Company I) have now gone international and having more exclusive brands and have more options so, you know, that's just the biggest market for all (Company I) brands. Even though the big brands are still there, it's a very small piece of that pie.

INTERVIEWER: And in terms of service, layout, merchandising is there a certain kind of feel or...?
PARTICIPANT: I'd say now it's gone both ways. We can turn around products and, you know, a bit more like their own brands. Yeah. More so now than...[unclear – 0:52] service. So it's having that fast reason to really sell this stuff.

INTERVIEWER: Okay. And I just wondered with the layout as well, the layout of the store?
PARTICIPANT: Yeah, that's where you're going towards where (Company I) is now. You'll always be hit with the more premium, exclusive brand first and then your lower price point further into the stores.

INTERVIEWER: And what about the store image, what are your views on that?
PARTICIPANT: I don't know. People walk into that store now, and it stands out to me as a retailer, cause when you walk into the stores now, you lead in with all these different brands. And that store, when you walk in there as a male shopper...what stands out to me is all these brands. But we have also moved towards [unclear – 0:53:53.0]. And they're the two main qualities now, I think. There's denim and there's footwear.

INTERVIEWER: Ok, and can talk about the marketing elements, brand name, logo, celebrity endorsement etc..
PARTICIPANT: That's kind of mixed in as well now because that's where our marketing comes from. We have to work with [unclear – 0:54:20.7] ourselves so, you know, a lot of the G-Star required working, they use a lot of the big images, like sort of celebrities like rock stars or famous people. So we'll work alongside them brands and advertise in our own store but the rights of the ownerships come from G-Star themselves.

INTERVIEWER: and would you say the change of your independent store adapting more own brand strategy has had any impact on the retail brand image?
PARTICIPANT: Yeah, definitely. I think over the last few years with (Company I), the changing...particularly where it has been, being in retail...it was all the higher end products, where now they've had to establish themselves as having that higher brand product but also that middle...market product and that's where you have, like, some product under your own brand at a cheaper price point. Or a structured price point for the customer. So it suits different parts of...you know, the clientele out there, so...you have the luxury retailer or the... and it has definitely opened up another door for consumer. Massively.

Company F: HR Advisor/Resource Advisor

- ROLE: I am a HR advisor for [...] London, and I have been in the company for the last two years.
- INTERVIEWER: can you tell me a bit about the company background?
- PARTICIPANT: Yes, so we are a London based company, and we started the business as a shoe label to becoming a global brand, synonymous with the best of British design. We take pride in our [...] collection which involves a nature of our modern woman. So our products are tailored to be feminine, targeting average woman between the ages 20 to 40. The company originally started as a small clothing retail business, but then we grew the business as global brand through our shoe labels, and so our brand is known for the best British design.
- INTERVIEWER: and what you say you are a retailer or a wholesale brand?
- PARTICIPANT: We are a very design oriented brand, so we sell our labels in department stores, like House of Frasers, John Lewis and etc. But at the moment we are focusing more towards our own retail stores. So we are about to open one in King Street, Manchester, and we are currently basically in the process of trying to hire the staff for our new shop there. For hiring staff, we need to make sure that it fits our brand, someone that has same passion as we do, which would then bring the customer in. So, we are actually not involved in advertisement, as we want our customers to know about us through word of mouth, customer service and the store itself, and this is why, we heavily rely on our sale staff.
- INTERVIEWER: and what does country of origin mean to you?
- PARTICIPANT: country of origin is the place where the product is made.
- INTERVIEWER: and how important is country of brand origin?
- PARTICIPANT: We are a British brand, and it has a huge connotation to our brands heritage. We are a family owned business, and started with [...], who had studied sculpture at [...], and the idea of the business is to redesign the traditional British style, using luxury natural fibres, alongside newly developed fabrics such as Iyrcra for drape and stretch and for this notion of capsule wardrobe, which then expanded into developing shoe label. In terms of our brand origin, the brand name has a direct reference to a particular kind of British living, as created and espoused by magazines such as *Country Living*. I couldn't tell you where the brand name is inspired from, but I think it has some connotation to horse and hound. In terms of where else do we sell, we have an online website, and the online offering has helped us in our partnership with the U.S. So now the company offers its design in a number of Bloomingdale's stores including the 59th Street store in New York.
- INTERVIEWER: and how do you implement Britishness in your retail environment?
- PARTICIPANT: well, in the UK, for one, we have our sale staff, and then in terms of retail environment, in some of our shops we use fruitwood shelves, wrought iron brackets, and tapestry-woven stools. In terms of clothing products, we display court shoes, cashmere reefers, jodhpurs and linen trousers, and this all reflects our Britishness, and reflects the country houses, horses and more.
- INTERVIEWER: and what about country of manufacturing?
- PARTICIPANT: we manufacturer in different countries, and they are sub-contracted, but then, we manufacture shoes in Italy and these are done in our own factories. So it's an integrated system, which gives us control on our designs and we can implement the ideas.
- INTERVIEWER: what about the designing elements?
- PARTICIPANT: Everything is designed in-house, which is a very important aspect of this business, especially as the brand focuses on the design and style element, which needs to fit in with our classic, luxury market. So for years, our in-house design team has been creating affordable luxury design in the central London since the very beginning of the

business. In terms of promoting design element, we don't necessarily promote that it is designed in the UK, apart from where when it talks about our brands story on our website. But it is a very important part of our brand message and image as we are all about the classic style that goes into our product.

INTERVIEWER: and which country of origin would you say is more credible to you in your opinion?

PARTICIPANT: The whole product. Your material, design and manufacturing all needs to be equally good.

INTERVIEWER: and is there any way you use country of parts as a promotional tool?

PARTICIPANT: All the heritage history about our brand and products can be found online. We do pull out parts where needed, and they are sourced from countries that are best known for their expertise.

INTERVIEWER: How important do you think is the British image to your brand?

PARTICIPANT: Its very important, representing classis and quality.

INTERVIEWER: Do you think manufacturing can return back to the UK?

PARTICIPANT: I am really not in the place to say whether it can or not, but I don't see why not. Anyway, I need to go andinterview the remaining staff for the interviews, please email me if you have any other questions or we can arrange a proper interview.

Company G: CEO

INTERVIEWER: Could you please tell me a bit about the brands history and your role please?

PARTICIPANT: My father was the one to bring out this company. He taught pattern cutting and tailoring at Hollings Faculty, MMU in late 50's and 60's[.]. When the department was about catering and textiles, with catering being the biggest part of it, and he became part of the university. I am a Joint Chief Executive of this company and also the executive of (Company P). So we represent the biggest clothing and textile business in the UK, and also part of the company P. My role was that I was the UK representative of company called Euratex, that's based in Brussels. This is more effective than the lobbying group, well it's a lobbying thing for European textile and clothing industry into Europe, and unsurprisingly they have split the seven state already, with having the marking, whereas the northern states doesn't.

INTERVIEWER: So how does that work?

PARTICIPANT: It has 27 countries in Europe, plus Turkey. The context of the political dimension of Europe as regarded - the commission doesn't ask the UK or German institution for their opinion on the origin marking, but they would ask Euratex, and Euratex has 40 odd people on the board, theoretically represents the European xxx manufacturing and the brands, but this depends on whether you're a member there. With Euratex, if the commission says what does the textile and clothing industry feel about the origin marking, the Italian, and the Spanish and the Greeks, and the Portuguese will all say put it on, US says put it on, and English has less say in comparison to as they did before, maybe because of the resources and this semi-remise manufacturing in the UK. But generally the English, Scandinavians, the Germans say you don't need too, it's superfluous. So that is like the broad split. So Euratex can't give a decision for the industry.

INTERVIEWER: And what about the importance of country of origin...?

PARTICIPANT: No, it's not! In Europe, it's not compulsory origin marking. But you're able to put it on. The only time you are expected to label is when the information you provide looks misrepresenting. For example, If you had something like England all over it, England, England and England packed around it, and then you had nothing on about where it was made, then you are misleading the consumers. So there is no compulsory origin marking, but we label our products with where the product is manufactured.

INTERVIEWER: And is your manufacturing or production taking place here or abroad?

PARTICIPANT: No! We manufacture all over the world. We don't have any manufacturing in the UK. We shifted the last of manufacturing from the UK in the early 2000 or something like that. So we are manufacturing in Poland, which is owned by us, and so we own all the facilities. Also, we are actually the only brand, apart from Barbour, who are in the category of a lifestyle brand. Well actually, we might not be the only brand, as the Scottish manufacturers are also lifestyle focused. But we are certainly the only brand in manufacturer brands within the [sea] protected area. In lifestyle, Ralph Lauren, Hilfiger, in Marine, Gill, Musto and Hally Hansen, none of them manufacture, but with our brands the manufacturing takes place in our polish facility, and everything else, we effectively include design and sourcing. Essentially, the design function is here and the sourcing function is here, but a little bit is done out in Scandinavia, and then there is a chunk that is done out in Italy, but then that is a full licensing, and they only take their own products and source wherever they want too.

INTERVIEWER: So you have touched upon how it's not compulsory to put on...

PARTICIPANT: No, it's not compulsory to label the product with where the product is manufactured, especially once it is shipped to Europe. However, the protectionist, if you like wants to have it legally and make forcible that the origin should be on. In states, you have to label your products, and you have to put it on visibly. So the consumer looks at the product and can see that it's made in China. In this case, the care label and the inside back neck label has to be more visible within how you're packing the product.

INTERVIEWER: So when you are talking about the country of origin, I believe you're explaining this from a made in context?
PARTICIPANT: Ahhh, it's 'Made in'... so country of origin, origin in terms of international trading origin is where something originates from, it could be the yarn that may originate. For example, you could have Egyptian cotton made in China, but what do you put on it? And that in some sense is silly of some people to display 10 things that are going into the garment, and then you also add where the final stitch takes place, which is what the origin is about. But, for the duty purposes I think the origin is yarn.

INTERVIEWER: So you would say the origin is related to country of parts then?
PARTICIPANT: It's where it's made in; it's where it's sustainable. We would mark it with where it is assembled, apart from when we have a lot of jackets made in China and Vietnam. But then you have people taking and labeling Japanese fabric; yea well what's that?... So I think, people who are probably the protectionist, who are propagating this, don't fully get what they are asking. An example of that again, this goes back to my European experiences, in which I am not longer involved in, simply because they choose to have someone from the textile sector because it is a bit more textile oriented. Now, where the aspect of care labelling comes in if you look now, it all connected. In the sense, that European parliament that insisted the legalization to go through wasn't commission based. The care labelling, for instance, any word you put on has to be translated, for example, look at ZARA products. But in some cases, it an absolute Encyclopedia, and obviously when you get to underwear, it's absolutely absurd. This is because the European parliament thought in a great wisdom that this was protectionist measure, but actually it's just a cost on a consumers and cost on the manufacturer, but it's the same thing, and they don't realize what they are asking..... I didn't really think of the context you were asking the question in, in which case, if you put the true country of origin, you are basically asking the customer person to access the garment, so you then have made in and country of origin. Made in China, country of origin Japan, consumers would be completely confused.

INTERVIEWER: So what would you classify your brand as, like country of origin of your brand?
PARTICIPANT: Oh, we are a British brand. As a brand, we are the original British [...] brand. And that is the tag line we use on everything. Obviously a lot of our products are fashion; I wouldn't say couture fashion, but its lifestyle clothing. And I am sure, if we were making heavenly in the UK, we would really crank it up with the "made in" label. I am sure if we wanted to break big time into japan, you have to do that, because that is what they are buying into, like Paul Smith and like Burberry, because they are made in the UK, but we are not. So at the moment, hence why we label are products from where it's assembled. And I think, on one level, consumers like to know where it's made and made in Britain means something, there is no question on that! 'Made in Italy' means something, although a lot of it is not made in Italy.

Now, it would be great to be able to put that on, but the only problem is that consumers don't want to pay. I mean if they pay less, its fine but for something like this, where the top may speak to be £900, but that's making it a point, because the labour rate and the material cost, which is the biggest portion of the product. But our customers, when they are buying the product, they are buying it for functional reasons, which mean more than where the product is made. The labour cost and the material cost are the most cost concerning elements in the manufacturing process, with the material being the most costing element. But to the consumers when they are buying that, they buying it for the functional reasons, which means more than where it's made. That's what I was would say. And I suppose it only matters, if you are trying to get a very British look, you know like Harris Tweed to be made in Harris, and I am sure Burberry doesn't make majority of their product in the UK anyway, but Barbour is still making a big portion of their wax jackets in North Shields, that's Je ne sais quoi, because you're selling a purely British thing. So, without the actual British [...] brand, that's a purely a technical thing. And does Jaguar really have to be made in the UK, does range rover have to be made in the UK, I am not sure, because it's an emotional aspect of it. The thing with clothing is that the assembly cost, the labour cost, the labour content is still massively important part of the total production cost. And there is need for some

fundamental automation around the assembling of the garment, for my brand and for most other brands, in which 'Making in UK' is too expensive.

INTERVIEWER: So, you have talked about the material previously, is that.....?

PARTICIPANT: That is Gore-tex! Some of that is actually taken place in Scotland, so that could possibly... well it's stitched in Poland, but its laminated in Scotland, and that is actual, probably... I am only saying probably because it may not be, that is probably EU origin, the whole thing. This is because the nylon will either be spun or woven in Yorkshire, or somewhere in Europe, but I think it's then laminated in Scotland, and it's then shipped over to Poland, and then it's sent over to us. But whether I think, well suppose if it was all made in England, I would slap made in England.

INTERVIEWER: But what one country would you associate that product with?

PARTICIPANT: It would still be England. If somebody in America was buying that, then they would associate the brand with Britain. The consumers know that we are a British brand, but whether they will pay £50 more for a jacket because it's made in Britain, there is a certain type of jacket, so more phase comes up, it's not the same thing but then its £50 quid cheaper, it's stretching it, given what it's sold for, if it's sold for Britishness, of course if its Britishness and made in Shenzhen, then it's not quite same is it? For brit's it will probably be ok. For a Chinese wealthy person, they would probably want to pay £50 quid more. They are very happy to pay £300 more just to say to their mates XXX that they have paid more. It's a bit of snobbery at the end, but also, I was thinking there is actually a website called around this area, "[...]".

There is also a big thing at the moment, there is a Great Britain, well not it's not called Great Britain, it's a government sponsored thing, and again, they are promoting a little Cameron innovative thing, promoting great Britain, and it's not just clothing, it's also scenery and stuff. And then there is let's make it here, and there is also, I don't know what angle your research is going in, but there is Lord [...] or David [...], I think it's called the [...] Project. Anyway, so what this [...] project has done is, it's tried to get government money or regional development grants for clothing, to invest, actually repatriating offshore manufacturing.

And they have got initially 10 million pounds, and I think it's going to go up to about 30 million, and it's going off the board, so people are actually going to the government, saying I have got this project and I want to have 30 machines, blah, blah, I am going to put its cost down to £250 pound, can't do it without you, give me £ 200,000.... etc, etc, but this is all part of a believe that we can repatriate some manufacturing into UK, and there is stuff around that, and of course we wouldn't be doing that, if we didn't believe that made in the UK didn't matter.

INTERVIEWER: And how many companies would you say are actually doing this..?

PARTICIPANT: Nah, I don't know many companies are doing it. But I know they had a good uptake on this. But what I mean by goods in taking, I mean 500 people, if you considered clothing and textile employed 400,000 people maybe 25 years ago, what is it they employ now 100,000, most of them are commercial jobs. So yes, there has been a big thing about people thinking about becoming repatriate, but my point is that Lord Wilson spoke against it, well not against it, but against the reality that consumers. Well, 95% of consumers, if you present them with a £100 piece or a £200 piece, they will buy a £100 piece, as long as it's well made. And my point is that the only true repatriation with the pound at this level is that this means they got to do a really good job of dropping it, but the pound rate at this level is so high, that the style of the content has to be so low, and the material content has to be so high. In other words, what this means that you are just going to be able to do it all here, because, for example, it's so expensive making products in Poland, and Poland is much cheaper than the UK, relatively to China, Vietnam, Indonesia and the rest of them, unless you have got the automation (machinery) for the process, which they have been trying to get for years, and apart from the cutting room, up to the point of the cut head, where they cut the fabric, yes? All the lying up, the equipment's, the design side and messing with the patterns,

that's fantastic what they have done, what's done there, but then it goes into somewhere else, even if you are paying the minimum wage because it is still very expensive.

INTERVIEWER: So your opinion, the parts have the most importance?

PARTICIPANT: Legally from moving goods around the place, the selection of your materials detaches the origin basically.

INTERVIEWER: And how about the construction of the garment, (e.g. made in and designed) what implication does that have on your brand?

PARTICIPANT: Well, we just put made in China, or whatever, or made in Pakistan, but not in Norway or Sweden, because nobody makes it in Norway or Sweden, I mean we have knitwear that was made in Sweden, but that is certainly knitting only. So wherever you have got high capital equipment, and wherever you have got world market prices, you have got chances of making it, but if you have got low capital equipment i.e. sewing machine is low capital equipment, and non-continuous, there are less chances of making it there.

INTERVIEWER: You have mentioned about manufacturing, but you are also a retailer?

PARTICIPANT: Well we are a manufacturer, but we are seen under so much turnover under our own retail, we opened our own store at the end of the 90's, and we currently have 30+ trading with the majority under own ownership, as in, that we own them, so we are the retailers. So we are under our own direct control in the UK: 12 stores, and we have stores in Poland: 6 stores, under our own control, we have in Australia: 2 stores, but we don't run them, and St. Peters berg: 1 store, Finland: 1 store, and then a few other, and we also have, 12 going into 18, because we are just opening 3 more now and then 3 more concessions in House of Fraser, where we are the retailer. The out of space, where we have to rent the space in a department store, but we don't rent the space, instead we pay the commission. But you are effectively renting the space on a profit-relating basis, and I would say that is the fastest-growing part of our business, in broader terms. But I suppose the strategy for us to go to the front of this was the significant e-tail business. [...]com, and the issue is to really face the consumers as one, but all the main brands have done that in all the categories. Many brands that haven't gone to the front likewise, a few retailers have come the other way for their brands and the rest of the stuff.

INTERVIEWER: So would you say, the focus of your brand is more towards wholesaling or retailing?

PARTICIPANT: No, it's retailing, because retail is the fastest growing, so its concessions at the moment but a concession is also retailing, just in a different style. We are just going through the process; well it's a macro and micro thing. The micro thing is that the UK high street retail has decided to drift apart from the flagship that is not where we should be, if you look across the UK, in any centre. You won't see a Ralph Lauren store, you won't see Tommy Hilfiger store, and whatever, and from now on, apart from Manchester you won't see our stores. Because when you are paying a full rental, the proposition is not successful, unless you are in a higher profit margin with a certain price point or using multi-brands. So, the multi-brand has to be a certain price point. There are some retailers who have got multi-retail brands but are absolutely not successful at the higher price point, because you can't pay the rent, and there is not enough volume going through, to allow you to pay the British rents. So we are extremely successful because of the coast element to our brand, that is not because everyone is buying water sports oriented clothing, it's because that is where we are often the best retailer in town, and we have this another unique offering which has [sea related elements] as well. So the brand is showing all in its glory, as to fashion show, and [sea related elements] show, as they are quite different products, but we have often, so there is a niche that we have there, that is growing and is very successful.

INTERVIEWER: So, wholesale brands shifting into retailing, what would you say are the differences in managing the brand, advertising, or in a similar content..?

PARTICIPANT: Yes, the difference is that when you have your own store, to make it successful you have to probably have a broader offering than you would, but that put into question something about your pricing policy. In a sense that it is not going to become a massive deal, but obviously, if want people to keep coming into your store then they are not going to keep coming in to buy the expensive gears, so you got to have an expenditure of a brand, which

will then make a store successful. As for managing the brand, I would say it's probably easier for a brand to become a retailer than a retailer to become a brand. Because of course, we are generating a brand automatically by our creative team; we are going on photo-shoot, and doing all this because we are a brand. so to them to use that collateral inside a store, we do that anyway, because we have already got it because we have been supplying wholesale account for years with it, obviously it's a bit different. But as a retailer who probably hasn't advertised a lot historically, well they are more and more now of course. However, brands going into retailing have had to go the other way, and create original marketing, which I think is a psychological challenge, but is isn't for people like H&M, because that is part of their DNA. But the thing is that they don't naturally do as a branding, by definition. So they need to project and take it forward in selling their brand, for example if they are investing in an advertisement campaign. On the other hand, for a retailer they would just be saying "come to us, we are great". What a retailer is saying is I can give you what you want, which is quite broad brush; whereas a brand is saying I can give you specifically what it is. So it's a different way of looking at the world.

INTERVIEWER: Can you please explain how has the brand evolved over time?

PARTICIPANT: The business originally was a manufacturing company, based in the Salford area, because that is where the skills set for taping seams was based, involved in raincoat manufacturing. This involved a specific skill set called making, and that means taking two pieces of fabric together and putting them together and bonding them, and that came within, from here to Manchester. Manchester was where the centre was because it needed that skill. However, today when you put a seam you need heat bonding. So for example, when you are dealing with a fabric like that [Points at the fabric], then that cannot be heat bonded. So, it needs to be done by hands, glue and that was also used for Macintosh and Burberry. So this is why we are here today, and then the communist started just up the road, and we ended moving to these facilities. We also use to have factories in Swinton and Wigan, and the manufacturing was held there, and the cutting room was downstairs. So from 96, no 93, we opened our polish factory, at that time there was no migration of labour and it wasn't just simply to say that we opened the factory now let's move from here to there, but we, over period of time moved certain products offshore, as in China, and an also went to Poland. In the meantime, the products we manufactured which were a 95% waterproof protected clothing, made in the North of England, exported around the world, to the queen of the world, so there was lots of business in the 80's. We then became the brand, and we still do the manufacturing in the polish factory, but the lower level stuff generally gets made in the Far East, because that is where the manufacturing is now, and all the other products are some made in Europe, in Pakistan, Tunisia, or it depends on what it is and depends on the lead time, minimums, and whole raft of complications.

INTERVIEWER: So would you still class this as a manufacturing brand?

PARTICIPANT: I would still say, it's seen as a manufacturing brand. Because the pinnacle of the brand is the [...] gear and the jackets, and people see it as that, but in 96 if it was a manufacturer brand and manufacturing was 90% then it's very less now. But we would be described as someone who makes things.

INTERVIEWER: What would be your definition of a manufacturer brand now?

PARTICIPANT: I would still say, well manufacturer brands like Adidas and puma don't make anything, but most people would still say Adidas is a maker, and I would still say that most will call it a maker, it is still viewed in that way. But surely, you wouldn't view H&M as a maker; they would view them as a retailer, even though by definition they are doing exactly what we are doing. But from inside the industry, I know that Barbour still makes a lot of their own gear, we make a lot of our own gear but I think their proposition is much higher because the size of their brand is rather doing extremely well, in the last phase or whatever, hats off to them. But the other side is not, I don't think they are successful, a proposition to our other side I mean, I know they are still making it in the UK, as far as I am aware they did. Last time I heard they did the American woman calling out because there were two factories in the UK, 400 people each or have they just gone. Obviously the Scottish brands, the knitwear and stuff, it's difficult really, because they are just not many.

INTERVIEWER: So do you think that from consumers

PARTICIPANT: I think from consumers, yes, I would say its blurred more for the average normal consumers.

INTERVIEWER: So you have touched a lot on country of origin previously, but would you say the country of origin implication on branding has changed as well, or?

PARTICIPANT: I mean we use the union jack quite a lot, internationally. They are not really interested that much here, but we do, when selling it in Scandinavian market. There is no question British sells, as American sells, depends on the country, of course, for some place I am sure it doesn't. There is a lot of Americana in Scandinavia, like Gantt, Lexington. Gantt is all mass market, but it's got a very high percentage of that market, and that's all about the American dreams.

INTERVIEWER: In terms of customer service and communication...

PARTICIPANT: No. we don't position Union Jack, well we don't particularly emphasize in our communication in the UK because we don't need to heighten in Britishness. It's just not needed because consumers know that we are British. But we do heighten a bit more for our official suppliers, have you heard of ben [...] he is one of the British water sports gold medalists. He was on the winning boats on American cuts. He got together a syndicate to bring back the American cup to the UK, and he is back to one of the very wealthy guys, do you know about the America's cup? America's cup is the oldest international sporting event in the history, in 1851. Queen Victoria watched it, but the fact is, it is about the British and the American having a water sports race. The cup has been competing since 1851, but has never come back, and he has put together a syndicate to bring it back. In [...] term, this is the biggest thing in [...], and he is probably the current best server in the world. He is definitely the most successful British [...] ever. I think he has got 4 gold's and one silver; he is the only guy for winning the American cup [...] for the American, but he was playing for the Americans. However, because we are the official partners for the British/American cup challenge, we are dealing with that side of Britishness. Because of these kinds of things, i.e. sponsoring the English team, dialing ups the Englishness of it; the Britishness plays part in our branding. So yes, it's important, we use our Britishness, whether we put it on our garment on not, I mean we might use it in our campaign, but not necessarily in on its own....

INTERVIEWER: But in terms of positioning the product.....?

PARTICIPANT: In terms of positioning the brand, we are the original British [marine] brand and we do use that quite a lot, and not just in the [] side, but in the lifestyle side. In fact, we don't use that at all in the [...] side. We use the performance on the marine side; Britishness means performance and quality. Britishness, well the idea of the performance is reflected in the polo shift somehow.

INTERVIEWER: So you know how you have talked about (Company G) more focusing on wholesale side of retailing, do you position your brands near to other British brands, or do you.....

PARTICIPANT: Well you have to position your brands where you get the space but we would not look for British brands, we would look for lifestyle brands. So we would want to be near Gantt, Ralph, I would say Ralph is our kind, and Tommy would be our favourite neighbours. We are often next to them, but we don't have a full map, and often we are also near Superdry, but that is more by accidental because they are more fashion jeans, obviously if you want to go into a place, but our best would be Gantt, Ralph, Lacoste, maybe Timberland isn't really there, but those are the sort of brands that we want to be alongside.

INTERVIEWER: So most of these brands are more international brands, would you see your brand going the same way?

PARTICIPANT: I would say Ralph and Tommy are very international, Gantt is a copy, well they are purport to be an original brand but they are not, there was the shirt made in New York and they all just started this concept in Sweden, so it all just started in Sweden really. So Gantt is not an American brand, its Swedish this whole thing, but they are very good in copying the Swedish. Taking ideas and flashing conceptuality what goes on, hence, IKEA and H&M, but they are very original ideas, Gantt was just a copy of American dreams, copy ralph, everyone thinks what it is, but in reality it's a copy of Ralph. But of course now, it's almost a Swiss company, and the

Americans never owned it. It was a brand that was originally down south owned by a shirt maker, and that was originally the American brand idea. So the true international American brands are Ralph and Tommy Hilfiger, Ralph by a long way, so suppose we do compete, but we can't out design Ralph in the sense that they are designing, because we are not a designer brand, but mostly, we are perceived as a high level. But the customers are not buying us for us being British. They are buying it because they trust the brand, they know the brand, and they perceive that it's a brand that provides them with quality, and there may be some elements of Britishness about it, with some feelings of the sea and marine maybe. So we position ourselves as a high level aspirational brand, positioning in the UK, and then if you say internationally, we position ourselves as a high level aspirational British brand, that comes from the sea, but everything is not covered in sea. But the nation image does a little bit input, as British means generally quality, even if its quality of culture. There is a perception that culture and the tradition is in some way good. So we use Union Jack in Scandinavia particularly, they have really got a thing going at the moment.

INTERVIEWER: How important do you think is a relationship between country of origin and brand in general?

PARTICIPANT: I think it's generally very important, because it gives a soul to a brand, and I think the static would suggest that this is true. Ralph is associated with America, Abercrombie and Fitch retail brand – American, Gant – American (incorrectly, but American because that's how it is positioned). Superdry is very clever, they have de-internationalized it, which I think is very clever, Barbour UK, Burberry UK, Prada Italy, Armani Italy, Diesel – people probably don't know because they don't position it, because they position just as a fashion. G-star Fashion, they bluff themselves to be cool and that sort of thing. Adidas do you think it's German, no I just think you think it's sports, Nike sports, but American sports. Nike does use it because they do their business on that kind of thing. BMW, you may buy BMW because it is German, because German engineering means something. So it does mean something, it's contextual to what it is.

Company H: Marketing Director

INTERVIEWER: Can I firstly ask your position, please?

PARTICIPANT: UK and Ireland – National Sales and Marketing Director, covering all the UK and Ireland.

INTERVIEWER: And how long have you been in this role?

PARTICIPANT: I have been working here since 1989.

INTERVIEWER: And can you please tell me your business background?

PARTICIPANT: The business was founded in 1894, by (Company H owner).. He was a Scots Man, and moved to [...], and then got settled here. He had been selling clothing, and then he opened the retail shop and founded (Company H) in 1894.

INTERVIEWER: So would you say (company f) is a wholesale or...?

PARTICIPANT: so in terms of what we do, we are a manufacturer, we have a factory on the other side of the hallway; don't know if you saw the building...which is divided between us. And in the factory, we have approximately 170 machinists, making core [...] jackets. When I say core products, they are essentially what we call core products- the styles of the [...] jackets have been going since the 1970s. So we have factories that are own factories.. But then we are also a wholesale brand, so in the UK, for example, our business has 80 million pounds of turnover. 60 million of that is what we call wholesale. We are also a retailer, because the 20 million pounds sale is in the UK retail. So we are a manufacturer, wholesale brand, retailer, and E-commerce E-tailor. So we are doing everything. And on the top of that we are also a licensed product, and we have subsidiaries in various countries, including Northern Europe, based in Germany, and North American, based South America.

INTERVIEWER: So could you please tell me a little bit about your own-retail store, are they your own product, do you combine them with other brands, or.....?

PARTICIPANTS: Within our own stores, we are a stand -alone stores, selling purely our own brand products.

INTERVIEWER: And have you ever thought about combining with other brands or not?

PARTICIPANTS: From time to time, we have collaborations, which are not quite the level of retailing, but we do have collaborations. Some examples would be; one of the first one we did was with “Boxfresh”, quite some time ago. Since then we have done collaboration with this Japanese designer called “Tokito”, Paul Smith, and “Hindmarsh”, and doing one at present with Land Rover and Adidas.

INTERVIEWER: what kind of collaborations are they?

PARTICIPANTS: They have all collaborated on products, and product being, generally speaking, jackets and sometimes footwear. Greatly it is jackets.

INTERVIEWER: So what would you say is the core advantage or benefit of collaboration?

PARTICIPANT: When you are working with another brand, for example – Paul Smiths, then we are both selling clothing. But the principle is that two of the great names are getting together to make the product, which then increases customer awareness, increases interest in both brands, draws people to your brand, makes them think that is the brand doing interesting things. So its like creating a bit of excitement and buzz, press interest around what you are doing and etc.

INTERVIEWER: So you are saying it's more related to brand awareness?

PARTICIPANT: Generally speaking, the number involved is not of the scale, which we have of the main range. When you are doing collaboration, it's usually on a small scale, prominently, in limited distributions. Not necessarily selling it everywhere, where we sell our brands. But the idea is to create that excitement, displays, get featured in the

press, people blogging about it, twitting and on suggesting on people's Facebook. Basically just creating all that excitement around the brand.

INTERVIEWER: So in terms of your own-brands distributed widely, do you wholesale them in department stores, or what kind of stores would you say.... They are?

PARTICIPANT: In terms of wholesale, we have got quite a wide spread of the distribution. Because of the nature of our brand, we would sell to a different type of distribution stores and outlets across different regions. So on a brand, what we have done is we have (company H) (pyramid 1), which is inspired by the countryside, and then we then have (Company H) International –which you have hopefully seen around. Which says on the jackets with the yellow/gold (Company H) international logo. (Company H) international would be seen as a motor and bike inspired type collection, and this other one is more countryside inspired type collection.

So the first one is (brand name) international authentic motorcycle range and that would be a functional clothing gear that you could wear on a motorbike, with a body armor inside. So if you fall, then this would give you little bit more protection. So it's an authentic motorcycle clothing, not necessarily something you would wear if you are tearing around a race track, and looking for full body protection, leathers type thing, but more of a motorcycle enthusiasm, somebody that have a try of type motorbike, rather than a 650 Honda, like whatever... but more of a traditional type. Above that, we have lifestyle-orientated clothing, derived from the authentic clothing... and at the top of that, we have a heritage motorbike look, which would be born again from the bike, but a bit more fashionable. And then on the top of that we might have collaboration, and that would be Beacon Heritage.

[..] was a Brand Name for (company f) back in 1920s. At the entrance of the Whitehouse, there were a couple of lighthouses, and we use to use beacon lighthouse as a brand device. So we tend to talk about that, and that is why it is at the pyramid. We are going to have collaboration with an Australian brand called "Deus ex machina". So it's an Australian brand, so we are a very traditional, best of British, motorcycle clothing type brand, meeting with this Australian bike, soft type brand. Put them together, you get the collaboration, gets in the press, and interests.

INTERVIEWER: But what benefits do you get when you collaborate with these international brands, products, celebrities and etc.
PARTICIPANT: Well, it gets a lot of interest in press, blogs, magazines like GQ, Mintel – magazines like these would top this up. So it gets coverage.. on the (2nd Pyramid) there is a country-inspired fashion, and so, along the bottom of that if we put sporting. Sporting would be when you are wearing functional clothing to go out shoeing, fishing, and other sports, not participating into that country wear, and above that, what we have been a country wear- and that would be more where you wear for a classic look. The country look is what you would wear if you are in the country, walking up in the country side, doing a bit of sport as well. So, the two comes together. So that is functional, and that is what people wear. Above that, we have a lifestyle, we tend to see ourselves as a premium lifestyle brand, and don't see ourselves as a luxury brand, because of the price point we operate, and we are talking about £200 or 250 a jacket, that is not really the world of luxury. The world of luxury you would put £1000, or 1200.... So for us, we see ourselves as a lifestyle premium brand.

And if you are asking from the distribution point, you would find us alongside of other brands, that would be sitting in that premium area – in the light of John Lewis, House of Frasers, Selfridges, premium life style, Regent Street, as supposed to bond street. Bond Street in London is to be top end jewelers, top end exclusive brands, not made for foot-fall. A lot more foot fall is on Regent Street, which are affordable, but are still a premium price. And then again, on the top of that we have heritage, which is more fashion, heritage on both these cases were a bit fashion, and that fashion is being drawn upon the lifestyle look, but then everything is getting close and tighter fitting in here. For the country style, it is loose fitting because it's country, and probably for older consumer. Younger consumers are, generally speaking, are not always moving up the pyramid. And then again on the top you would have a beacon, where the collaboration would fit in.

Now what we do in terms of selling is, we sell the collections to different stores, and so if we take the two pyramids, so along the box. You get to sell the brand to loads of different people at the same time. But we are in different stores, with different products. So depending on what you are looking for, you will find it in different stores. The consumer will look in different areas. Now we do have company stores, where we sell everything, but when we wholesale, we sell different tiers. So for example, the sporting tends to be as I would suggest sports stores. But sport stores and country, so country sports would be farmer merchants, and the stores would be located where farmers may shop. On the other hand, country sports shops would be where fishers tackle shops, gun shops and but they are usually the same, and then country wear stores, would be in country type location – which is very often about country wear store. So all of this could be selling a similar type of products, but some of them may be more specialists. Then premium lifestyle, we tend to sell to department stores, so like John Lewis, the house of Fraser, all people like that. And heritage to some department store, which applies to both, like Selfridges, Harrods, Harvey Nicks and people like that. And then what you also have been independence, independence fashion stores, like “Oi Polloi”. Then there is a store in Newcastle called “End” clothing. So these are two stores that tend to sell up close to the top of the pyramid because they are the fashion leading stores. Then we have an outlet in Cheshire Oaks, which is a company owned store. So all these are fashion leading stores, so these are the example of the store.

They tend to be independent itself, but the fashion leading stores, often very small stores – very directional, but they are in the place to be seen; and then you have chain store groups. Places like Van Mildert, Flannels, cruise fashion. So cruise is a bit like flannels, they are higher up the pyramid. And then there are sister chains, like Aspecto. So they sell both (Company H) and (Company H) international, so they are the big player. So through having different segmentation and collection, we can sell different product ranges to different people, because the way it works is, people here would not be happy if they are were buying exactly the same product as these, they like to have differentiation, so what we do is, well sell different slices to different people. The consumers that shop in the stores would be radically different to other stores.

INTERVIEWER: So are you as a brand targeting a big range then?

PARTICIPANTS: So yeah, we have a big range of the market. So if you are in Manchester, go to Aspecto, there is a (Company H) store just off king street, and then you have House of Fraser.

INTERVIEWER: And what does country of origin mean to you?

PARTICIPANT: country of manufacturing. Where the product comes from.

INTERVIEWER: And why are you associating this to the country of manufacturing?

PARTICIPANT: In terms of the way we talk about labelling then in that context, it tends to mean country of manufacturing. There is another way of looking at which could be where the product was inspired, designed, developed and everything else that goes with it, but with where the legalization is heading, then the country of manufacture tends to be tied towards the country of origin. That is the way it is appearing.

INTERVIEWER: So would you say the country of manufacturing is the most important element than the country of brand origin and country of design at this point?

PARTICIPANT: No, I wouldn't say, I mean we are a British business and the fact that we were found in 1894 by (Company H), and we are still holding as a privately owned business today. So we now have [family members] (Company H) and [...] (Company H), who are the owner of the business, and so, we are still a family-owned business, carrying family value, we have a company vision, mission, and values. And they are behind everything we do. The company vision, mission and company value gates some of the things we do. We engage with our customers by telling them that this is what we are about, this is what we are trying to achieve, and we would like to work with you to achieve objectives.

INTERVIEWER: So in terms of manufacturing, how important would you say is manufacturing to (Company H)?

PARTICIPANT: It is an important factor, as I have said earlier we have our own factory, with 170 employees, making a jacket. The proportion of our customer would look to see where our products are manufactured.

INTERVIEWER: So you do think it is important, with the in-house manufacturing.

PARTICIPANT: Well it is a balance, we could everything do – the skills and recourses required for manufacturing aren't available for us in the UK, so for us a balance between maintaining our factory, and running an academy and apprenticeship towards supporting the staffing of the factory is important, especially with the demise of British clothing manufacturing industry as it is simply not practical for us to have everything made in the UK. So we source from various places around the world, but all to our standard. The part and the design comes from here, the patterns comes from here. And then there is a standard maintenance of manufacturing standards that comes from here.

INTERVIEWER: So your fabrics /materials are from here then?

PARTICIPANT: Not all of them, No. We have a pattern services department that makes the pattern of the garments and designs, which are based here. Pattern service is based here, and we monitor to control the manufacturing, which is done on our behalf, but it's not done here. so one of the products we are best known for are the [...] jackets, and so that is why we still continue to manufacture in the factory.

INTERVIEWER: And in your opinion, which dimension is most credible and effective in general terms?

PARTICIPANT: it is a difficult one to answer, as all the rest of the questions were in the relation to our brand, and for us everything is about our brand. It is probably illustrative of that, so everything we do is brand standard, all the things we do are important, so our company objective, we are not purely about the sales number, it all about our brands, and its development, as to achieving our company vision.

INTERVIEWER: And which dimension of the country of origin is most important to your brand?

PARTICIPANT: All of them, cause it's a combination of them.

INTERVIEWER: How important do you think is a relationship between a brand and its country of origin in general terms?

PARTICIPANT: It's important because a lot of people see it as being a British brand, and we are a British brand.

INTERVIEWER: I know your brands emphasize on the labels and all, but does the brand have any other association with its heritage?

PARTICIPANT: So the labels we have "(Company H) of the [...]", is the reference of the location of the business, saying all about the beacon entrance at the time, especially for the logo that is particularly used. The beacon was the (company H) building in the market place in the [...], and then there is (company H) in the front of the script, and on the roof we had [...]oil and this was in the early part of the 20th century, not that many people would be seeing it from above, so it was a bit interesting that they were putting it [...]up there. But that was the branding of the family business. And then on the top of that, we've got the royal warrants, which were from HM the queen, Elizabeth II, the duke of Edinburgh, and HRH prince wales – strongly associating this with the Britishness.

INTERVIEWER: Would you say your logos are an association with the British heritage as well?

PARTICIPANT: that's not a tradable part, it is an award. People would look at the brand name and they would be thinking of (Company H) as British.

INTERVIEWER: Could you tell me a bit more about crest warrant please?

PARTICIPANT: These are the crest and legends to go with the Prince of Wales feathers, royal warrant. When we received them, we displayed them with our products, as these were the awards to us. But when it comes to labeling, we want to

put them on the jackets that are made here, so they appear on the logo of the jacket, that are made in own factories.

We use the union jack as well, because people see us as being British, so it's a natural connection, but some of the use of the union jack relates to the, for example, we have a Steve [...] collection, so we have iconic American actor image that is the driver of our product range, and we use our union jack on it. That is because in 1964 Steve [...] was part of an international 6 days trial team. He was from America, and had stopped over in the UK on the way to Germany, and all the team bought them a (Company H) jacket, to ride in the trials. So to us, this comes in there because the imagery we use of Steve [...] is the name of the (Company H) jacket.

Another one is a lot of military people wear the (Company H) jacket, so that is almost becoming a part of the uniform. So we do a collection based on Steve [...].

INTERVIEWER: so with your association with American actor, doesn't that take away its brutishness?

PARTICIPANT: it could, but it brings the story together. So there are all the pictures of him wearing (Company H). So there is also David Craig, the Actor from the James bond movie that wears (Company H). He is British, from the hull.

INTERVIEWER: What do you think is a relationship between a brand and its product?

PARTICIPANT: Products are what we make, and we make lots and lots of products, a brand is all about the feelings. So customer's perception, expectations, and experience with the overall product. And we often talk about that the best representation of our brand would be if we have pictures, and people would look at it and say ah it's (Company H). Without telling them, to tell people you have to push it hard on them to look at it say that is definitely a (Company H). So for us, of course, they are linked but there is this, well years ago we use to have advertising in which you could ever hardly see the product, but people would see that as a (company H) experience, the wild of (company H). The jacket we make, and the sweater we make, people feel engaged with that.

INTERVIEWER: so do you carry a brand perception?

PARTICIPANT: Not recently, No.

INTERVIEWER: how do you develop strategies for the upcoming future with those results?

PARTICIPANT: within our brand, a lot of what we have, for example on our website we have engagement with our consumers. What we find is that our consumers love to tell us about their experiences, so we do a lot of that through Facebook, twitter, online, maybe start off a competition saying send us a picture of you when you wear a (company H) jacket, and you and your dog and whatever. And people are very happy to share that, we take that imagery with us, so we run them on our website.

INTERVIEWER: you have a lot of tartan prints on your clothing products?

PARTICIPANT: yes, we use a lot of tartans. It's a big one for us because within our jacket we use tartan as magnesium of making it another identifiable fibre aspect to the product. So we have our own tartan. Our own (company H) registered (company f) tartan. Tartan has variation, so we have 6 variations. There is a classic tartan, ancient, modern, nude dress and there is one missing.

INTERVIEWER: Do you think the country image has an influence on a brand image?

PARTICIPANT: yes, I think it can have an influence.

INTERVIEWER: How would you say this impacts a brand image?

PARTICIPANT: depending on where you are, so if you were to ask what the impression of England was, the image of England may be the certain image that comes to mind, so it might be David Cameron, cricket, football, fish chip. But if I said to you William Shakespeare, the lake district, Stratford upon Avon, Windsor castle, Buckingham palace, so it's all different images of Britain, and that is what you get, and then when you say Scotland, it becomes a bit more extreme and rigidness. A bit more relating to weather, whiskey, and you get different imagery like

Edinburg, tartan, so certain images comes to mind, and in our case, people tend to look at us as very British, because we are English based company with a big Scottish heritage.

INTERVIEWER: so would you say these tartan prints are coming from the Scottish heritage then?

PARTICIPANT: yeah, because (Company H) was a scots man. (Company H) was born in [...], which is just across the border. so there is another image that that tells where this has developed from.

INTERVIEWER: so any other way your brand emphasised on country of origin?

PARTICIPANT: Well a lot of the colours that were used, so if you look at the principle of tartan, the one that goes with the camouflage, so idea is referenced to the history, the use pigments and dyed are drawn from the country side, so there are three front colour, and three back ground colours. So in terms of colour, people tend to think (company H), and (company H)'s logo to be green. Colour is one of the big contributing factors. The other big thing is the fabric we use, so if you look at [...] cotton. It's a natural fibre fabric, so it tends to mould, and take on character and personality. So, one of the features in people building infinity or liking on certain part of their wardrobe, tends to be born out of the garments made out from the natural fabric, so you don't see many people say oh that is my favourite nylon sweater. Or that is my favourites pair of leather shoes, as supposed to something synthetic. So Why because leather takes on shape, character, and (irregularities) so we have service department over the road, where we service around 10,000 jackets over the year, so if people are bothering to send the jacket back to us for us to reprofit for them, so it changes and evolves over a time. In fact, there is this market that use (Company H) jackets for people who want something that has already got a lived in. and so again, in terms of talking about brand, I mean our products develop a bit of a relationship. I mean people feel that they have a connection with us, rather than "I bought a product today, it was once worn and now I'll throw it away, so its once time". So it's like making a memory, and forming a relationship.

INTERVIEWER: And do you have an online and/or catalogue service? And do you emphasize on country of origin through those sources?

PARTICIPANT: We have online service, we don't have a catalogue, but loads of our customers do catalogue service. So what we are talking about right now is celebrating 125 years. So we celebrate our heritage, and that is our brand message. so the brand message is driven through our 125-celebrating company heritage.

INTERVIEWER: And How do you think these messages impact a business brand image?

PARTICIPANT: it's very important, well across all market there is desire for products with heritage, so for instance distributors from japan are very keen on branded products with heritage. In fact, that we have 125 to celebrate, we can demonstrate this because we have done a rework of the front cover of the brochures from 1908, and so we keep copies of brochures we have had since 1908. So a lot of people we work with are UK, European, Far East, they love the fact that we have a lot of heritage.

Company I: Creative Art Lead-Director

INTERVIEWER: Your role please?

PARTICIPANT: So I look after design, development, materials and innovation for (Company G). Which basically is kind of a head of design with other bits bolted on.. but its anything with creation. So I am responsible for taking a brief from the product management team and getting whatever that is destined to be, to be launched.

INTERVIEWER: And can you please tell me a bit more about the brand itself?

PARTICIPANT: So it's an outdoor clothing brand. So (company I) is a company that was born in 1966, in Newcastle. It is called (company I), which means [...] in German. The guys who invented the brand wanted to have a European sounding name, which is why they chose (Company I brand name). Because at that time, most of the good and new in product was coming from Europe, however, the brand started off with more equipment than clothing, and then kind of moved into that area. It was then bought by the (parent company) in the 90's, and they now own it. So (parent company) owns a number of brand, including [...], [...], [...], so they have quite a lot of brands. We are the only brand they have in the North East of England, [...] is in Nottingham. But we are still very much part of the (parent company) family.

INTERVIEWER: So you talked about the adaption of the European name?

PARTICIPANT: Yes,

INTERVIEWER: Any particular country in mind when they were thinking about the name?

PARTICIPANT: Well, it's a German name. So a lot of people in Germany think it's a German brand.

INTERVIEWER: And, would you class your brand as a retailer or a manufacturer?

PARTICIPANT: (Company I) were initially manufacturer and retailers. The guys that invented (Company I) or created had a little shop in Newcastle called [...] centre, which is actually still there, owned by one member of the two guys. And, so they made and retailed product. Now, we are more of a wholesale, so wholesale is what we are best at, selling to other retailers.. our key sellers in the UK are: Black, Cox Wool and we have key partnership in Europe and Japan.

INTERVIEWER: So, did (Company I) initially start as a manufacturer or a retailer?

PARTICIPANT: They started as a retailer, so they were importing other brands from Europe, and the pulled a gap in the market and pretty much ended up making their own brand. So if you look at the outdoor retailers, most of them have their own brand as well buying product from other ranges.

INTERVIEWER: And, are they still involved in the manufacturing side, or has that moved?

PARTICIPANT: We don't manufacturer anymore, so we are a brand. We buy product from manufacturers, so we design and develop products with manufacturers in different parts of the world.

INTERVIEWER: What are the key countries that you are currently manufacturing the product at?

PARTICIPANT: First is: China, Vietnam, Indonesia... there are other countries that have been looked at, but we haven't moved there yet.

INTERVIEWER: And what is your reason for you choosing these countries...

PARTICIPANT: So, I don't choose the country we work with, we have a sourcing team based in Hong Kong, and it's their job to identify the sourcing strategy for the next 5, 10 years. To work with us, we have a scorecard we use, which covers many different level of criteria from CR, to the skill set, the cost of getting goods from one place to another, and all of that has to be taken into consideration.. and you select your manufacturer on the basis of that.

What you tend to find is that big players like Nike, Adidas - in the sporting goods area, will move to the area first, and that helps to put in the infrastructure that you need to get to the point, where you want to be....

INTERVIEWER: So you mentioned earlier how (Company I) opened up as a retail, and now is known focusing on wholesaling, is there anything different in terms of managing a brand?

PARTICIPANT: So, potentially you can make more money if you retail yourself. Because you control the margin from beginning to the end, however, with all that - comes a whole set of skill set and complexity, so we do have some retail stores, but we don't have many. To be successful in a retail store, you need product range that works 365 days a year, and you also need the type of product that your customer would come in and expect to find in the store. So you have a choice of either selling your own product or sell your own product along with other brands that would bring customers to the store. So you can imagine if you are creating a product and getting it to launch point and then selling it just into retailers, you choose what they want to have in store, you reduce the level of complexity, even though it comes with its own challenges. It's simpler to deal with wholesaling, because you don't have to deal with Bricks and Mortar, the staff, the logistics, the bringing in wider range, the bringing products from different area, so you basically don't need to host a whole set of skills that need if you are not holding yourself as a retailers.

INTERVIEWER: And in terms of positioning a brand, how does that differ...

PARTICIPANT: Yes, it's harder if you don't have a flagship store. Because through that you can absolutely present your Sunday best to the consumers, you can see how and what they think of you, when you are working on a wholesale model, you can try your best to say that this is how we want our brand rep to be for the consumer, but fundamentally you are not in control of that.

You can give all your tools and the assets - you want the retail to display, you can give them out a map of the area on how it should look on a bay that is 2 ½ meters by 4. This is how you merchandise a colour story; these are the assets, communications. But yes, so basically to some extent they can choose the way they want to represent and charge what they want for your products, and it can be hard sometimes to present the brand you sometimes want the people to see. They only take a very small, narrow selection of product from you, so a product range in retail would be a lot bigger than what you see in independent and department stores.

So we have specialist accounts that are usually quite small, and then we have a lot of independent that we supply too, and then we have major UK account. Blacks are part of JD group, Cots are also part of the big group of outdoor for UK and Europe, and Go Outdoor is a group itself. So they have quite a large number of stores, and they are quite aggressive, they are big box stores, out of town. They are quite big and you get a big discount card like you would at Matalan, they sell their store price. However, they have got very well trained staff in store; the level of service is good. The customer is good.

INTERVIEWER: In your opinion, what do you understand by the term country of origin?

PARTICIPANT: Well, I have quite a naïve term, which is believe it or not, because I am not involved in sourcing, or customer service. So country of origin to me is where it is manufactured, or where it is finished. 13.42 and that is just through the, when I say when it is finished, it is just from watching programs on TV, then my experience here, and realizing that some people get something merchant somewhere, and then get it finished somewhere else, and claim that it is made there. But this is not from working in (Company I).

INTERVIEWER: In terms of (Company I), would you still say where the product is manufactured?

PARTICIPANT: Yes, but that is not from working, it is literally a learning fume, but I don't get involved in a legal side of labelling products.

INTERVIEWER: And in terms of brand origin, you mentioned that generally how consumers assume that (Company I) is a German brand, what country would you associate (Company I) with?

PARTICIPANT: It is a European brand, because it's part of Europe. It depends where you are standing in the world. So if I was standing in Japan, I would call it British, because they think British as a really good thing. So in terms of the brand's origin, I would say it is British. And about the design..... Yes, it's designed in-house.

INTERVIEWER: And how important would you say is country of design to (Company I)?

PARTICIPANT: I would say it's very important that you really need to understand your consumer. To understand the consumer, you need to be really close. For example, if we were designing for Japan, we really need to be in the heart and mind of the consumers. So Japan would help us design, but we would still design it here. Because we need to make sure that the handwriting of (Company I) is still the same and that (Company I) is global and can work globally. We are not building niche products, or for a particular market. Actually really understand the consumer is the most important. If you can be close to the consumer and design, then that is brilliant, you have more chance of doing it well.

INTERVIEWER: So when you talk about design, is it from designing pattern blocks or prints?

PARTICIPANT: I think it's every detail of the product because you have very different views of what is tasteful in different countries, from Japan to Germany. In between France, Germany, Poland and even Nordics, there is a very subtle difference. For example, Germany doesn't like three colours in one product. So if you have one colour on the top body, and the different colour on the lower part and then third colour on the zip, they freak out completely, whereas, I am like what's the big deal, but they really don't like it. So they like keeping things simple and that is like the general feedback we have got from the guy who sells it to the German market.

It comes down to understanding the real subtlety of what goes on in the product. And then in terms of silhouette, shape, and block – the way the product fits, how long the sleeves are, how long the body is, it's all quite difficult, because if you think about how we are selling to Japan, and then we are also selling it in Nordic, there is a massive differentiation in terms of height. At some point, you have to decide, who the person is, and body is that you are making the product for, and you have to be really consistent with that. Then you have to flex around, to make the product applicable in different regions.

INTERVIEWER: And in terms of country of parts, how important would you say is this component to your brand?

PARTICIPANT: I think it's becoming more important as people are more aware of environment impact of the product. So we get a lot of questions about our 'down jackets'. So I think it's becoming heightened awareness on the importance of the products they buy. I have never had anyone ask where your Zips are made; it is usually things that may have a high profile in the press, could have impact – Bizarrely people tend to care more about animal than they do about people. So they will ask if it is ethically sourced, particularly ask questions about where we get – like the third party suppliers, and are we sure that they are ethically managers.

So sometimes it seems as though people sometimes ask what is in the press, but there seem to be an overall increase in people being interested in the component part of the product, and I would imagine that in 10 or 20 years' time, it will become more important, in terms of traceability, and being able to be absolutely about where you get every component in your product.

INTERVIEWER: And is there any element from country of origin components that you use as a brand message on your product?

PARTICIPANT: Emmm, No! I don't think so. I think the only thing we have been looking at, or are, is 'down'. But I am not 100% sure that we make a statement.

INTERVIEWER: Now, in terms of country of origin, which dimension would you say is the most important in your opinion?

PARTICIPANT: I absolutely think it's a marriageable three, you can't, you can have a fantastic design and but then could be made in a factory that may have no capability, and that would absolutely, it's kind of like rock, paper and scissors. You could have a brilliant manufacturer, and an amazing design, but then if you have a bulky fabric on the basis of its cost, whatever the reason it may be, so anything is as good as some of its part, so you can't really split one away from another.

INTERVIEWER: And how would you say all we have discussed impacts a brand image?

PARTICIPANT: I think some consumers because I trust a brand. I am a typical customer that for example if I go to Reiss, I would expect a certain standard, and if they don't give me that standard then I won't go back to them. But I don't look at where the product is manufactured because I expect a certain level of responsibility from a brand. I suppose it's that, if I am buying a brand that cost respected to your income, that cost a lot of money then you expect a certain level of standard. I won't buy it from Primark because I don't expect them to be ethical. I can't, I suppose being in the industry, but how do they do that for that price, and then maintain all that level off..... so then, yeah, I suppose that, some consumers will look at country of origin and make assumption based on that, but I have learnt that not to make assumptions about country, because fundamentally, in the UK, we don't have the skills to make products, so we are no better than any other country, as long as the infrastructure, the training, the skills, are managed well to a certain standard.

INTERVIEWER: How important do you think is a relationship between a brand and its country of origin?

PARTICIPANT: Really important, I think a relationship between a brand and any manufacturing Company is absolutely critical, because if you haven't got a good relationship- so you might have a product that you will make with only small volume, if you have no relationship with the manufacturer, then they have no reason to make that. If you are, for example, take NIKE, I am sure you can colour shots to some extent, you give lots of volumes, but if don't have enough volume, and you make complex or let's say tricky products, fundamentally you relationship has to be far better, because the balance of power has to be equal. You need the manufacturers, as much as they need you. There is a need for the level of transparency to create a trust; you have to manage the relationship well. So if you have a lot of false promises, such as give forecast that has to be updated to accurate, so they can manage the things they need to manage well for their production and timetable etc. and giving them a balance to business and balance to portfolio such as style, so they get something's that are high volume, then they get complexity with style that is more innovative. And making sure that the product is suitable for their manufacturing capabilities and not putting too much pressure on making them do things that are really out of their comfort zone, whilst still expecting fabulous standards and great manufacturing, and that is very much looking from my perspective.

INTERVIEWER: In terms of, (Company I) is a British Brand and then you have a very German name association to it, how does it maintain its British Identity?

PARTICIPANT: I think (Company I) is quite a funny one, because (Company I) started off trying to pretend to not be British to some extent because that was not seen as an advantage back in the day. Because in the 60's all good outdoor product was coming from Europe, you didn't get a massive amount of British people going into the mountains or isles, and suppose it's based on what was seen sexy in the mountain during the time. Europe was the place to get the product from, so you are selling scarper boots along with (Company I) bag-pack and clothing. In 1966, even from British fashion perspective, European was seen as premium, so do you think about product mix then, there wasn't a massive amount of European product. So it's going back in the days. From European perspective, British is still considered old fashioned, boring and for old people. So there is still that image, that do we want to be British, I mean, I am product of being one, and the brand coming from New Castle, but it's not relevant for our foreign market. But if you talk to the head of marketing from our team, she would have a completely different view.

INTERVIEWER: Do you carry out brand perception?

PARTICIPANT: Yes, we do.. and that is done by our parent company. I am not sure how many times a year. It's to kind of check the brands health. So we do it against our competitors, as we may find that our brand is not fashionable but trusted in terms of quality.

INTERVIEWER: what is it that is building the brand trust?

PARTICIPANT: I think reliability and believe that a product will perform. So if the product does not perform then it will come back. We do lifetime guarantee, so we got boots back that were 20 years old, and people were like they are not

working anymore **chuckles**. So there is a massive believe that it will last longer, but it is very expensive. So if you are investment £273 in Gortex, which is expensive, or £400 nylon jacket, that is a huge investment, so you have to have a level of trust.. so you have to build the product with the trust that your product will perform in the environment. Not only will a consumer be disappointed, but you could have a guy on the top of the mountain – who could die of a weather because he got cold and wet etc. So, if you are building products for extreme environments, a consumer is that is using it will never use it to that extent, and therefore, they should be really pleased with the performance they get.

INTERVIEWER: So you have mentioned that consumers have sent you product after 20 years of owning the product. Do you mind me asking, what do you do with those products?

PARTICIPANT: Emm- sometimes, well we do have a great customer team who works with quality and customer services for a long time, and of course, they would trying having a little talk about how consumers may have had a jacket for a long time, but sometimes, they may offer a new jacket, but it just depends how loyal the customer is, and how much they love the brand.. and we do get customer who absolutely express love for our company. So I think the quality team do an absolutely amazing job in making customers feel like we care, with balance, *chuckles*.. so what we do, we have jackets and boots that come after such a long time, so they take each case individually, I have got an over archly policy I am sure, where I have to explain to customer that they have had a really good use of it.

INTERVIEWER: In terms of branding a service, how do you do that from retailers and towards the end user?

PARTICIPANT: From a retailer perspective, so they get a lot of support, on-hill training. We have a team that goes out and take stores staff out on the hills, so they understand what the benefits are of using the products, performance. Then they also do demonstrations of new product and technology; maybe they will have demo kits that will enable the staff to demonstrate it to consumers, quite a comprehensive package to enable staff to understand our products. And then from a customer points, we have a team that tries to have a really strong relationship with customers, by tailoring their service, for example, might be how the product has to be packed, the box size, how they want it delivered.. So there are quite a lot of things involved, and it's quite complex, as a lot of different retailers would ask for different things, because there way of working is different the store and warehouse.

INTERVIEWER: In your opinion, what does 'British' stand for?

PARTICIPANT: Well, Europeans think it's boring and old fashioned, but what do I think. There is quality, euthenics, and probably having some elements of history. Maybe I like to consider myself as a European than to consider myself from a particular country because I don't want to have that association or big picture. So, I don't have any desire to just label myself as just British, but I am proud of where I come from.

INTERVIEWER: And is there any way you emphasize country of origin on your product or service?

PARTICIPANT: No, Not really.

INTERVIEWER: And what about labelling?

PARTICIPANT: All i'll say is that we comply to all our legislations..

INTERVIEWER: So how do you think, the changes of retailing to wholesaling, and from manufacturer to retailers have an impact on a brand image?

PARTICIPANT: I think it does have an impact, but more so locally, because we use to have a factory just off the road in Washington, and that is where the jackets were made. But you tend to have more people here saying that, but your jackets were made in Washington, and we will be like No, the factory closed in whenever, and, then they would go, "oh where do you make them now then, do you make them in China?". So you can see people's reaction that they take that negatively. So, to be far, I don't understand, because I use to work in a factory that supplied to M&S, when I first left university, and I remember going out to Morocco, and we bought a JB in Morocco, and walked into the factory, it was exactly like being in Peatley they had the same uniform and were

doing the same exact activity, so, I suppose people look at it from a (unclear) jobs, that have moved offshore, whether they see it as the product will not be as good, I am not sure.. or whether it is because manufacturing is not carried out here, so the loss of jobs is having an impact. So it's difficult to see why people have that image or impact.

INTVIEWER: Do you think this impact has anything to do with country image perception?

PARTICIPANT: It might do, apple panorama - and it was actual before the Christmas I think, and it was the broken promises of apple, and it kind of went through the factories that apple have worked with in China, and the afternoon naps that are happening in every factory in China, as people are falling asleep on the machine. So if you are sitting in the UK or Europe, and seeing things on the TV that suggest the environment where the products are being made, Far East countries are substance, then yes then you would think or have a distrust, or think that country manufacturing or the length of time people work and etc., so it does have some connection with that.

INTVIEWER: You mentioned how they previously use to manufacturer here and how they have moved globally, what were the key reasons?

PARTICIPANT: The cost, I know that - if you look at the retail price of our jackets, you look at the retail price of clothing in general over the last 20 years, it's not where kept, like to like. So pressure is put to reduce price for the end user price, you end up being squeezed for cheaper way of making the product. So there will be movement from one country to another, and if there are labour rises, taxes - so it's a constant movement and shift in Africa, and I think retailers are in a constant movement of trying to offer the price consumers are willing to pay, and as long as someone is willing to do that, so everyone follows that.

INTVIEWER: and would you say it's the cost of the labour, material or transport?

PARTICIPANT: I think the labour cost has the biggest impact, because then that impacts everything, if the labour cost goes up, then the cost of everything will go up, the cost of transport will go up as well, but then you will get, so as you went to country for manufacturing, you will go to a country where the labour is cheap, and as the country develops, prices start to increase. I am not a business student, but having spent so much time in the industry, I just see a pattern occurring.

INTVIEWER: and does your company manufacturer in the same country where the material countries?

PARTICIPANT: We have different patterns depending on how widely available the fabric is, so - you have sometimes it's beneficial to buy a fabric in the same region as manufacturing, because of tax, duty, and terms of duty, sometimes you are limited because you want something so specific from a technical perspective, which may only be available from one supplier, like polytechnic, like branded fleece supplier, and they might be making it in America, and we may want that one specific fabric, its the only one that delivers the benefit to the product for consumers. But it really depends on what kind of product are you talking about and how special the fabric is, obviously you only certain factories for the gold license. So for manufacturers to make Gortex products, they have to have a license issued by Gortex, they are a limited number of factories that have a Gortex License. There are factories that have had lost their license not approved by Gore, that obviously causes difficulty for us because we now have five garments that we have to find the factory.

INTVIEWER: You have mentioned that a lot of this has to do with the cost, pushing the manufacturing overseas? with a lot of recovery from manufacturing, do you think brands will be reshoring anytime soon and why?

PARTICIPANT: I actually know that in Manchester they are looking at whether it is possible to bring manufacturing and M&S was like all "Yea", it's a great idea, and having worked for them and knowing that they are the reason factories have no work in the UK anymore, like spectacle maybe. For us, to a small extent maybe, we do make socks and a few accessories in the UK, but I don't think we will bring manufacturing back.. not saying that it won't have benefit for the small quantities we do, but I think, for example - we recently lost our sample machinist - trying to

replace her has been almost impossible, skills are just not there anymore, talking about setting up from the scratch, the benefit will be smaller, the minimum quantity ordering is growing in Asia every season, maybe we will have more minimum order quantities, but I have heard, that the factories set in the UK are a lot worse than Asia, because they have to compete cost perspective.. I don't know, I would think yes, but do I think people would want to work in factories anymore in the UK. I am not sure about that either. I kind of use to think call centres were the replacement for the clothing manufacturing, they are, but I don't know if young people really want to work in the factories environment. I think they see it as a step back then working in an office with nice clothes, and personally speaking, I think we have got a very lazy mentality and attitude to work in.

INTVIEWER: What about the technology?

PARTICIPANT: I think Britain has always been a very creative nation of people, I think there is definitely opportunity from an innovation standpoint, and we are really quite renowned for creative. So if you want to set up a factory in the UK, a decent factory, you have to take that risk and make the investment. I do hear that a manufacturing facilities are opening in the midlands, but I am not hearing good things about it, like Mary porter and the knickers factory that are I am sure ethical, but I am hearing about other factories that aren't very.

INTVIEWER: And what are the advantages and disadvantages..?

PARTICIPANT: The skills and the cost issues - I don't see any issues, I mean it will be near to the consumer, the development time would be less, I mean we spend a lot of time sending the product back and forth to turkey. so you would be able to cut your development time substantially, but the fabric will still have to be shipped from the Asia.

Company J1: Senior Buyer

INTERVIEWER: Can you please tell me a bit about your role and company background please.

PARTICIPANT: I am the senior buyer and have been in the company for 14 years. Company Background– We are a huge multi-channel retailer, traditionally specializing in catalogue shopping, Internet shopping and more recently stores. The business is structured into three power brands, (Company J), (Company H - Sub Brand), and (Company J - Sub Brand 2) – in the men's side. The store fascia's at the moment are all store fascia, which involves (Company J - Sub Brand) and (Company J - Sub Brand 2). So what dual fascia is that each store we open will have half (Company J - Sub Brand) and (Company J - Sub Brand 2) section, rather than just stand-alone (Company J - Sub Brand) store.

The customer demographic for (Company J) at the moment is about 58 to 60, 45 for (Company J - Sub Brand). Now the challenges business has got at the moment is to drive both of the customer's average as younger. So, like almost looking at 45 + women for (Company J), and 25 for + for (Company J - Sub Brand). So, where the business is at the moment is that it is well known for COSP's, unique selling propositions. On women footwear, it is wide fittings or you know your choice of width fitting. On clothing, it's the bigger (plus sizing). The next challenge on the business is how to become more encompassing i.e. That whatever your size is, or whatever your fit is, that we have the clothes for you. On clothing, we are looking to do smaller size, which I think has already been introduced, so we have already started doing size 12 on (Company J - Sub Brand). On footwear, we are starting to do a lot more standard sizes. The standard size is D, whereas, at the moment most of our footwear is E or EEE. We will still remain very important in the width fitting market because I think that is where we are the market leaders. However, it is important now, that we start looking at the standard fittings because a lot of our new customers that we are recruiting aren't wide fittings. and there is traditional way of recruiting, i.e. press campaign, and they are becoming a bit off sleek now. The new TV adverts, of course, with (Face of the Company) being our brand ambassador. This is bringing in young customers, and not necessarily wide fitting footwear customers as well.

Also, as supplier integration becomes more important to us as a business, we want our suppliers to load products onto our websites, and we trade that on a commission basis with them. Their ranges are not generally wide fitting, so we need to be in tune with them, for example, we were doing Lotus in E and EEE, and the EEE sizes are exclusive to us, and so, we were putting [Unclear] #00: 04:08, things to go online. However, there may be 100 other Lotus products online, but none of them will be EEE because their business isn't about EEE. So there is a little disappointment from the customer that there are EEE but want more Lotus, but that's where I have to say, that there is nothing more for me. So what we do is paper [Unclear] #0:04:24.2, we replicate what the website does, and the team works with each other. So that is something new we are doing as well.

INTERVIEWER: And when you talk about Lotus, they are a manufacturer brand or?

PARTICIPANT: Yes, they are a brand. In terms of manufacturer brands, none of the brands are manufacturing anymore. Apart from some of the very high end, for example, men's brands like Loakes and Barkers. The UK manufacturing is virtually dead, so there is not much of that going on. The only one that is being done in the UK are, we have got Van Dal – still doing a small amount on ladies. Hotter is still manufacturing in the UK. Now hotter claims to manufacture in the UK, but what do they actually do is, they bring the uppers in, so the uppers are actually made abroad, the bring them in and put the soles in the UK factories, so it isn't the full process of footwear, just the sole.

INTERVIEWER: But are the soles made in the UK?

PARTICIPANT: Yes, because they are injection moulded. Van dale, on the other hand, makes the entire product from start to finish, cutting, closing, lasting, and stitching. Everything is done in the UK factory, but it's only a small

percentage, maybe 5%. Van Dale is based down in Norwich, and Hotters is based in Skelmersdale. So, some brands have their own stores, but some work on concession basis and some brands then just supply to people like to us, or independent stores, and just working as a supplier of a brand, rather than wholesaling it.

INTERVIEWER: And you mentioned about your brand moving into a retail brand store, why is that?

PARTICIPANT: For us as a business, the retail store is about brand recognition; I don't think anyone in (Company J) thinks that we will be revolutionary in terms of doing loads more business. But what we will have by the end of the year, or by the end of next year is that anyone in the country will have a store within a 40-miles radius of where they live. Now, when we have seen that, the up taken sale around that brand recognition has been phenomenal. So the stores are there to create sale but it's more about brand awareness. I mean one of the reasons why we have a store on Oxford Street is not because we are going to make a huge amount of money, but just to have a presence and an increase in our brand awareness.

INTERVIEWER: And could you talk a bit more about opportunity to drive sales, as you have mentioned earlier?

PARTICIPANT: Well the context to drive sale is that we haven't had any retail stores before; we have been just purely paper or internet based business. So what it is also going to do is, that it will lead to selling more pairs, so we will end up buying more shoes, and then that should have a knock on effect on, because if you buy more shoes that you have better cost prices. From a customer's point of view, it allows them to actually go into the store, feel and see the product, try the product, which, of course, you don't have those benefits when you are working as a mail order or internet retailers. So, the key element of the store is the same as the rest of the business. So at the moment it's almost about the USP, wide fitting, bigger sizes because that is nothing that is bought separately for the store. So everything comes from the main range of products. So, the store just mirrors the image of the business.

INTERVIEWER: And the service you provide on catalogue, could you

PARTICIPANT: In terms of catalogue sales, obviously, you have sales and then you have the returns. You obviously want fewer returns, what the store gives you is a lot less return rate, because customers have the opportunity to try before they buy, whereas, with the catalogue you get the product and then of course you try, and if it doesn't fit then it goes back to us. Customers might get the on the basis of the year one [Unclear] #09:52.09. You don't get that in a store, as they may just try it, and if it fits then they may just buy it, and if not then they don't.

INTERVIEWER: And you previously mentioned about manufacturing being dead in the UK, what are the key reasons for that?

PARTICIPANT: The key reasons for that is, well manufacturing has been dead in the UK for past 20 years. The cost of importing products has been just so cheap; it's uncompetitive to actually manufacturer in the UK. Will the manufacturing come back to the UK in footwear? Very difficult, because the cost of actually setting up factories with the machine would be very expensive, also the skill sets that are involved in manufacturing footwear is a lot different. For example, if you were a clothing manufacturer, to set up a factory in the UK, it's a lot simpler, then footwear factory, e.g. the material, cut, sew, etc. With so many different components and machinery needed to make footwear, it is still handcrafted skill, which I think will be difficult to set up in the UK.

In terms of country of origin at the moment, China and India represents 80% of where footwear is produced these days, with China being the number one producer of footwear, in the world. Now the problem with China at the moment is that minimums are getting higher, and lead times get longer. Also, the small factories have now been squeezed and the bigger ones are the ones that are left. The Chinese nation as a nation is struggling to get workers in because of the one child policy. So what parents have managed to do over the past few years is that, because they have one child, they have more money to spend and so, they can get them better education, and so they don't want them to be working in the factories, and to be honest, if they do work in the factories, they are more likely to be better air conditioned, or in an electronic factory or something, rather than a footwear factory. So that is becoming a bit tougher as well.

At the moment, there is a little bit of a push for retailers going back to the Europe, and closer to home. Italy, Spain and Portugal being the three big Europe countries for footwear manufacturing, now what you get from those guys I a lot more design, the prices are obviously a lot more high, but you can buy it in small quantities, and logistically you can get them a lot quicker. So that is ticking a lot of boxes for a lot more people, especially for fashion retailers, who want the product in and out very quickly. You cannot get that kind of service from China. So those markets are going to continue being strong, obviously, the way exchange rate with Euros is working out at the moment is working a lot more in favour to manufacture in the Europe. Whereas, two, three years ago, the exchange rate wasn't as good, and so, there is a big opportunity in Europe for that. And, some of these countries have to reinvent themselves, with a lot going into Portugal and India. For example, Portugal was very much a copy market, so they were relying on the suppliers, with customers giving those products to copy. They quickly realized that that cannot be the way forward, because there are cheaper markets like India and China, and they will do the copying a lot more economical then they can. So, therefore, they got to come up with the fantastic ranges, where the buyers will go in and say right, ok, I'll have, that, that and that. Whereas, when you are going to India, a lot of times you have to feed the manufacturers with what you want, and that is where Portugal is scoring at the moment. There is also, Eastern Europe coming up now, with Italy, especially Tunisia, Moldova, Egypt, there is footwear being manufactured in those countries now.

INTERVIEWER: So you mentioned about the skill sets not being available in the UK, and are they available in Italy and etc?
PARTICIPANT: Yes, because they have not lost their manufacturing hub. They factories still kept going, the downside [Unclear] #0:14:14.2, single on the small scale, that the skill sets are still available in Portugal and Italy to do all these kind of things.

INTERVIEWER: And what are the key things that pushed UK to move overseas, but didn't push Italy as such?
PARTICIPANT: Well one of the that has pushed is that the British mentality is that, in terms of spend, if you look at places like Primark, the British mentality is that if they have £100 to spend then they would buy as many things as they can possible for £100, whereas, European mentally is to invest £100 in one piece. So those markets invest in quality, whereas, UK doesn't as much, and as a consequence, the average selling price for footwear in the UK is a lot cheaper in comparison to Europe. Material as well in Europe, leather is very important, and so, they look for quality leather shoe. On the other hand, in the UK, it doesn't matter, as it's about the price, with consumers wanting it cheap. That is starting to change a little bit now, with people starting to look at some of the branded products, and starting to look for quality, but that is the way it has gone now. The UK is just driven by Chinese imports for the past few years.

INTERVIEWER: So you mentioned that the UK mentality desires more product than quality, or the other hand, Italy is expected to provide more quality products, how is this expected to impact the business?
PARTICIPANT: For us, what you have to do is as well; we are looking at our exit margin rather than our buying margin because it's alright if you buy 500 pairs, and you make a good margin on the face of it, but if you have to clear. For example, if you 500 pairs, you might sell 250 pairs of that 500 on the full price, then you might have sell another 100 in 50% reduction and then you might have to sell the last 100 on 70% reduction, so actually, it's your exit margin, and not what you have bought. You might be buying a lot and making a good margin, but ultimately you are not clearing them. On the other hand, out of Europe, you are making a lower margin to start with, but ultimately, you can sell your product on full prices, and you will end up doing less discounting. So that is the reason there, and all the business will be doing this, they will start with the lower margin, closer to home, as they won't have to invest much money in the stock, so you can buy smaller quantity and so your stock holding will be less. Therefore, there will be less risk and less, mark down.

INTERVIEWER: Can you explain the margin a bit more please?

PARTICIPANT: The margin is like the profit you get from the differences between what you pay for the shoe and what you sell it for. So you would likely sell the shoe for the less profit, so your profit won't be as big, but ultimately the profit. Well in simplest terms, if you bought it for £10 and you sold it for £30, you would make £20, so you know what you are making. But if you bought it for £5 and sold it for £30, then you may £25 quid, but half of them you may end up selling for £15, so you only end up making £10, so it's about the profit you make at the end of it and not the profit you think you would make. Because you are buying in the margin that is always based on the 100% sales through of full price, but you never get 100% sales through of full price.

INTERVIEWER: So would you say its fewer profit margins when you are buying from nearby locations?

PARTICIPANT: Yes, because they are more expensive, they will never be able to compete with the likes of China and India for price, but then they can get it to you for a lot quicker and then you can buy it less, so you have less of your money tied up.

INTERVIEWER: So when you mentioned the changes in China, what are your future plans?

PARTICIPANT: So, well we are looking at Europe, and also starting to look at other countries like Indonesia, and obviously what they can do. We are also looking at countries like Turkey. Now the difficulty is that with China becoming more dominant, it's where is the new China? Now the world is a lot smaller place than it used to be 20 years ago, and there are no hidden secrets anymore, and no country is suddenly going to emerge and we would be like, wow, we didn't know that existed. Whereas 25 years ago, people were going to China the first time, and experiencing the low-cost prices, so that is not going to come, prices will start to creep up as well. So it's sort of educating the consumers whether the prices need to be nudging up, and the prices are slowly nudging up in the high street.

INTERVIEWER: And do you manufacture one product in the same country or is it different?

PARTICIPANT: No, there is no hard and fast rules to what product should be manufactured in which country. It's obviously mostly based on what are the cost prices you get, and it's also dependent on the product as well. For example, if it is a very basic product on a low price with mass volume, then of course China will hit the market. If you are going to buy leather with high leg boots, then India would be the market. So it depends on which product because most areas can make the same product. It will depend on what you will sell it for, what will it be branded as, and how many you want to buy. And we don't interchange too much for footwear's, because footwear's are all based on lasts, so the set up to cost to actually get to another country would be quite prohibited, because for example, if you want a new sole putting out, the sole maker would want around 10,000 pairs putting out, whether it is utilized across 20 different styles, they don't care, but you will have to utilize that pair. But what you will not get is, one country setting up 500 pairs, and then another country setting up another 500 pairs. So you as a buyer got to utilize those lasts and make sure that the costs are fine.

INTERVIEWER: Now on your understanding what does country of origin mean?

PARTICIPANT: Well, the country of origin is where the product is manufactured. So for example Hotters is a brand and although you will get different brands from different countries, so no brand will be buying their product just from one country. They will use different countries to get their product. So that is entirely up to them, where they get it from. So what Hotters will look for is what is Hotters look at the end of the day. So, what is Hotters brand, what does it stand for, the kind of look they want to go for, so then they would get the manufacturers to work up to their look. The last thing you want as the buyer is to look at the product and say, OMG that is made in India or that looks Chinese. And when you are an expert you can tell, but ultimately I don't think the customers really care where it is made. The customers are generally looking for value for money, or what represents good value for money. I don't think customers actually pay too many thoughts into what country is this coming from.

INTERVIEWER: But you have some products that are made in Italy, what about that?

PARTICIPANT: There are some products, for example if you get a product from Italy, Italy is perceived to be a bit more about designs, style and etc, so you might actually put a label say, "heavenly soles made in Italy". Because that perceived to be a bit more stylish, but on the flip side, you would not label heavenly soles made in India because

those countries don't have that design or that connotation of being expensive. But Italian has that connotation, as they are more expensive, stylish and everything like that.

INTERVIEWER: And what image does English have in the current market?

PARTICIPANT: In terms of, what they are looking for when buying a product, I think English person is looking for the style. So, No person would pick up a shoe unless they like the look of it, regardless of what the brand is. So the first thing is I like the style, Secondly, is it comfortable, does it fit well, then that is a half way through the sale, and then finally, what is the price. So there to me the big three things, no one buys the shoes because they love the brand, you know they got to like the shoes and ultimately be comfortable in wearing them, and the price got to be right, the brand just got to ties it with them.

INTERVIEWER: And in terms of brand loyalty.....

PARTICIPANT: I think the younger the market, the fewer brands loyal they are. The older the consumers, the more they are expected to be brand loyal, especially on footwear, whereas the people get older the feed spread, and that is when they will find the brand that they trust, for example, Clarks. We know some people that will go to Clarks and that is all they will ever buy. So they will always return back to Clarks because they know that the shoes are comfortable and they fit, they know it's a bit more money, but they want the shoes to last, as supposed to throw away fashion. For the younger market, it's more about here today and there tomorrow, they don't want to spend a lot of money it, because they only want the money to lasts a few weeks, and then they want to be able to go and buy something else, because they view the shoe as an accessory rather than an investment. On the other hand, older market deems is as an investment, which is expected to last them. So the older market would look for better material, i.e. leather. On the other hand, younger people may not be bothered with what kind of material is it made off. Younger people are a bit more price conscious, so if you look at students and how they are unlimited budget, whereas, older people may perceive cheap as cheap, which is not going to last.

INTERVIEWER: In your perception which dimension of COO is more important to a brand?

PARTICIPANT: Well I think the first thing to a brand is its own identity, every brand has to have its own identity, what does the brand mean, what does it stand for, and where does it sit within the marketplace. What are the consumers looking for in the brand? so the brand needs to know all that before it starts going off, and knowing who your customer is the key and knowing who to target because a brand is never going to satisfy all of the people. You are not going to get a brand, for example, if you look at Modern and Pelly – which is more about fashion and less about comfort. So they know who their target is, sort of like, women under 35, looking for a bit of bling, looking for heels, looking for something that is a bit elegant. They are never going to produce something for over 50+ market, because that is not their consumer, and therefore, that consumer will never go into Modern and Pelly for a product. On the other hand, you will get brands like hotter, where the hotter trap line is “the comfort concept”. So every connotation Hotter has is to do with comfort, whether it is the heel or something. So the younger is more about design and the older market is more about comfort.

INTERVIEWER: So what does country of origin mean to your brand?

PARTICIPANT: At the moment we don't manufacture anything in the UK, so there is no UK manufacturing. We don't particularly play a lot on or advertise anything as country of origin. What we need to do is work out the best suppliers, working at the best prices and also providing the best quality. It is important that we get the quality right as well because the biggest supply to our business is the customer returning the product. So we need less product to be returned, to stick with the customer, the suppliers need that to happen as well, because if you get something that returns lower, then the supplier get the repeat orders, if it's a high return then the supplier gets fewer orders because your stock is constantly coming back into the warehouse, so you don't need to buy more. So, from that point of view, we need to tailor the manufacturers to the product, if it's a more fashion product then we might buy closer to home because we think actually we are not going to buy and sell as many as that. So, therefore, that would tailor onto which market it comes out to. If it is something that has got a full piece

promotion, which we think is going to be a bit more classic type of product – then probably China or somewhere will be the market for that. Because we know that we can place big volume.

INTERVIEWER: And do you promote English heritage onto your product?

PARTICIPANT: No, the heritage we don't at the moment, and that is something we should maybe consider, especially because we are the oldest mail company in the world. At the moment, the company is going through a bit of renaissance, in terms of, we have had (Company J) in the business for ages, but we have had a lot of trading titles. We have never really done things like TV advertising before. (Company J - Sub Brand) and (Company J - Sub Brand) are a bit younger type, if you look at (Company J - Sub Brand) on the men's side, then they are very heavily influenced by Freddie [...], who is the brand ambassador, the cricketer. So he is the face of our (Company J - Sub Brand), and (Company J - Sub Brand), we have had many brand ambassadors in the past, but at the moment, I think we are looking for one. (Company J) is (Face of the Company).

INTERVIEWER: So a lot of companies invest in international celebrities, what about your brand?

PARTICIPANT: Well, celebrities are a lot more expensive, they are not cheap. If you are going to get a celebrity then you need to think if they fit in with your company, brand image, how are you going to use the, i.e. will they be a face of your brand, or will you be doing a cloth collaboration with them? And you got to think of what that celebrity does things away from the business, what kind of life they lead. Because obviously, if you have someone that is falling out of a nightclub then at 2 or 3 am, then is that the image you want to be associated with your brand.

INTERVIEWER: And you have mentioned about how your company is focusing a lot more on online lately, do you see yourself promoting country of origin on that?

PARTICIPANT: As far as I am aware, at the moment there aren't any plans to do that, but to be honest, that is not really my side of the business.

INTERVIEWER: And it says how important do you think is a relationship between country of origin and its brand?

PARTICIPANT: Your brand is less important to your country of origin, as your brand is important for the suppliers you have got. So it doesn't matter whether it lies in India, China, or wherever, the supplier needs to know your business inside out, what the consumer is, and what you expect from them, so that is the key thing of working as part of a supplier. So the suppliers need to get to the mentality that they are supplying the end consumers and not (Company J). There is ultimately that supplier A is supplying to (Company J), and will then supply to Mrs Smith. So the supplier needs to think about Mrs Smith direct. About whether she will be happy with the shoe, will she come back and place more orders, and think about her actually picking that shoe and go "WOW, I love these", rather than I am going to ship 5000 pair of these to (Company J). So it's tuning everyone in with the customer, because without the customer none of us actually have a business.

INTERVIEWER: How important would you say is the brand name to the brand?

PARTICIPANT: Well, the brand name is massively important, so, for example, we have three brand names representing the different segmented market, which is a bit like Arcadia, which has Burton, Topshop and etc. They are under the same company, but they are targeted at a different market, and that is what our brand is doing, targeting a different market. The brand name (Company J) come from (Owner of the Company), who formed the company back in the days. (Company J - Sub Brand) comes from Giacomo Casanova – the famous lover. (Company J - Sub Brand) – I have no idea, I think it was just made up and has no meaning.

INTERVIEWER: Do you carry out brand perceptions?

PARTICIPANT: Yes, we did, and, to be honest, we have someone who is coming in as a brand manager to look at that, because previously we haven't had people like that in the business, so that is something that will go into the business in the next 12 months.

INTERVIEWER: One last question, how do you think country image has an impact on a brand image?

PARTICIPANT: I don't think it does, no.

INTERVIEWER: In terms of India and China what are the challenges you face when working with global suppliers?

PARTICIPANT: Well with the global suppliers, India's biggest challenge is quality and design, because, the design is becoming a most important element into all manufacturing. The biggest problem with China is increasing lead times, fewer factories. Because the fewer factories you have the more demands will become minimum, and less flexibility. The key challenges are what they perceive to be quality, use of materials, making sure that they are using the correct material, because of the biggest expenses in the footwear is the leather. So, for example, someone may think if I use this a bit lower grade, will they be able to tell, so you have always got to keep your eye on everything. We have to employ an agent to make sure that we get, because with us not being in the marketplace, you need people to make sure that they understand that what you are specifying is actually being followed by the factories. India and China, you will always get problems, but you get that in an area you will manufacturer.

The countries climate is another issue because sometimes we have had things that are packed in a warm environment and then when it's travelled to a cold environment and then warm again, which can lead to things like mould. However, you do have things like micro packs which should prevent mould. But we have had issues where they have been fake, and not worked. Then we have had issues packaging and labelling, making sure that they are correct. We have an automated warehouse, so if something is not labelled and packed correctly then that would cost us big issues when it comes in, attention to detail, you know like making sure that the soles are the right colour. When you have a catalogue or Internet business, people are buying from a photograph, so the product must also represent the photo.

INTERVIEWER: And do you have challenges with communication?

PARTICIPANT: Emmm, communication is less of a challenge because you are dealing with agents, should you deal with the factory direct, that can sometimes be a problem/challenge because English is not their first language. So that is why we will employ an agent because they will usually go in and we would usually hire a local agent as well.

INTERVIEWER: And about the currency?

PARTICIPANT: China, we deal with US Dollars. The company will buy US dollars up front, so we are usual give and buy from the finance depart and the exchange rate we need to use in the trips. In India, we buy everything in sterling's, so everything is bought Sterling's. And it does not impact the business in any way; if anything it impacts Indians because if the rupee changes against the pounds then, sometimes if it gets a bit tight then they come back and say hold on, the exchange rate has changed massively. Currency is always a challenge, because if you are buying it in dollars if the dollar rate is very favourable then you are making a good margin if the dollar rate drops then you make less margin. This is why many companies buy upfront rather than just working out.

Company J2: Head of Department

INTERVIEWER: What is your role, please?

PARTICIPANT: My role is head of buying for footwear and children wear.

INTERVIEWER: And what does the role actually involve?

PARTICIPANT: Essentially responsible for all the purchasing of those product categories, on behalf of [...], in order for us to sell. So in terms of, the actual role, the actual buying staff, i.e. the buying team reports to myself, as this is done as part of the trading team, and it's up to us to affiliate [Unclear] with our colleagues from the merchandising and quality assurance, to ensure that we bring the right product, right place at the right time. This is in order for our marketing team to market it and then sell it.

INTERVIEWER: Can you tell me a bit about the purchasing process please?

PARTICIPANT: The process vary depending on the product categories, and the brand. But essentially, the vast majority of it looks at the history, in terms of what we have done well, by product or product categories, by true brand or by our own labels. It looks prominently from a sales point of view as well. The process also takes return levels and service issues into account etc., in terms of what we have done well or sold. It's then about also looking at the future, so in terms of predictions we might get from other people, i.e. external organisations or consultants, design influence, looking at our competitor's home, and abroad, and essentially building what we call a range plan. This is a phased range input of a season, of a product, throughout the proceeding of probably six months.

This is towards that season with the view to put in together a range of products that our marketers can sell. So we work six months in advance to begin with, but then we work depending on which market we are sourcing from. As to how far in advance do we have to work, but then we also work in season as well. So there is an open option to buy in working with seasons that we would then purchase in seasons, which would either be repeating the same lines or buying new lines. So in any one period of season, a buyer is probably looking at three seasons frankly, which includes working on a product that has just gone, one that is in, and the coming one. So it's a revolving six months, not just one six months but keeps revolving. This process is really drawn out from the areas we now sell the products in. So, instead of just being a six monthly catalogue that we drop on the customers door mat, they would then look at those six months and get a brand new one.

Essentially, now, even the paper is actually changing as the customer has evolved into something they receive every week or every month. More importantly for now us, because we are increasing the internet business, which is a daily, monthly and weekly changing business, the products that are already available to the those customers, and if you add on that now, because we are a multi-channel, the store side of it where we have got 14 stores, Brick and Mortars, in addition to the high and [...] side of it, which again is a more fully idea of what we got to sell, which then draws us back to what we got to buy.

So we take all these inputs, described before, plus the brief from marketing, and then they might have a considerable impact on what sorts of themes they are looking for and what type of customers are going forward, e.g. age, profile, where about in the country, international, as you may know we are already selling abroad. So all that inputs go into a product proposition, and then the buyer puts a brief in terms of their buying plan, which becomes an overall buying plan that is then budgeted against. The budget is produced right down the product level, so the top line, in terms of PLC, and [Unclear]. Its then up to us to decide and agree that plan, with a formal meeting that we have, which is called a range control meeting. This takes place during the season that you are evaluating. But looking six months plus advance for when you are going to sell it into a sourcing strategy, about how we are going to buy the product.

INTERVIEWER: And in terms of country, how do you select.....

PARTICIPANT: Again, a combination of reasons, so for example, if you have been doing it for a number of years, you have historically built up tied with certain countries, and makers within those countries that you actually purchase from. Secondly, there are certain products that are more suited to the certain parts of the world to source from. For example, if you are looking at casual shirts on children wear you are more likely to source from places like India. If you are looking at more formal type shirts, you are looking at Bangladesh or China, because of the structure and the nature of the fabric that goes into them as such. Similarly, on footwear, if you are looking at leather products, then they are pretty much the likes of India or Portugal, and Italy in particular is very strong in leather type of products. If you are looking for synthetics, you might look more at China, Vietnam, and things like that. There market is better suited for producing certain types of products, and so we know that. But there are other factors that come into account, such as, in terms of where the strengths are, for example, we might have offices that may help us with etc and etc. This is what I am talking about in terms of direct sourcing. But of course if we are doing it through an importer than it's up to them where they source it from, plus there are other things that go into the market place at a particular time. So going back many years ago, it was who has quota, in order to be able to sell the product.

INTERVIEWER: and can you tell me a bit about quota please.....

PARTICIPANT: So the quota uses to be; if you were in China, you could sell 200 Million pieces of footwear to EEC, and that was it, that was your limit, and you then gave it to the branches, and then that was divided among people. That concept was then abolished, which changed the way things were sourced for many years ago. But now there are things like GSP, which is a general system of preference, where a country previously you had to pay anything from, for example, footwear 17% , and clothing 12% duty, you would then import it into the UK. Because of the nature of those countries, they have been given certain exemptions against that duty, so instead of 12%, it might be now 0.6% or it could be duty-free, and that changed slowly, but it does change over a period of time. So that could then make 12% difference on the cost price. So previously where a country was more expensive – it might become more competitive than now. But then you also have to have a balance of risk, because the first rule on sourcing is getting your gear (your product), so the current risk at the moment is the Mainland China.

Because the demand remains high, capacity is reducing, and because of this more and more people are going out to work or they don't want to work in factories, they would rather work with the rise of the middle class in China. Also, the wage rate are going up faster in China than any other manufacturing country in the world, so you might decide that you want to reduce your reliance on China... and therefore what you tend to do is exploratory trips around other areas. So to give you an example of that, on my last footwear trip we went to Indonesia for the first time. So they can make similar type products to China. Historically they might have been seen as more expensive but the way China prices are going, so that's changing. So we would go and explore those markets and see which suppliers we could potentially use, what agents etc. etc., and all things being equal, we'd start to talk about placing some trial orders with them and all that. So things like that happen. If you go back twelve months ago or ten months ago, when I was on the garment side of things – 'cause obviously my background was menswear and footwear; it was menswear – I went out to Vietnam, Cambodia... and Myanmar. Again to look at potential new sourcing markets for us as an opportunity away from Mainland China or even potentially Indian subcontinent. But really Mainland China, because that's the way it's going – it doesn't matter if it's clothing or footwear or cars or anything, frankly. So we're all looking for various different places that would suit our business, because every buying business is different. You know, we're looking for different things – different styling, different quality, different quantities (which is a major issue for this business)... ..different price levels, different repeatability, boom, boom, boom, boom, boom. So you've got all these different things going on and therefore you've got to match that up against each individual country.

INTERVIEWER: And when you talked about, for instance, when you'd been to Cambodia, is this from a labour cost perspective or is this from a material or...what kind of things are you looking at when...

PARTICIPANT: Well, you're looking at everything. You're looking at the selling prices into us, you're looking at the lead time it takes them to make the products and ship it into us. But in terms of what makes up the prices, you're looking at labour rates. You're looking at how much it actually takes a person to make that product, and that varies in different countries. So in countries such as China where there is a lot of machinery and technology, it tends to be quicker and the labour rate is quicker. In the Indian subcontinent it tends to be slower but labour is cheaper.

INTERVIEWER: Why do you think it's slower in India?

PARTICIPANT: Because they're slower to adopt new technology. They're very old-fashioned. And they're not really into it. India's still is moving from being a cottage industry. And you're looking at the infrastructure. So, for instance, moving things around China is a lot easier than moving things around India. So you're talking about communication. Can you communicate with them? There's a massive trust factor within all of that as well. And then, you know, those types of things go into a general feeling for the market plus the actual cost prices that go into it. What you're looking for when you're exploring new markets is taking all those particular things into account...plus not just the lead time of getting the product from out of their factory into our warehouse but from placing an order to it coming out of their factory. So where are they getting the fabric from? Where are they getting the leather from? Where are they getting the trims from? Where are they getting the buttons from? Where do they get the labels from? Because in certain markets they can do it themselves. So if it's India, Pakistan, Bangladesh, China, no problem. If it's somewhere like Vietnam, Cambodia, Myanmar, Laos... they tend not to do that so they have to import it all. So then you need people in the country that can pull all that together, including the fabric, put it all in one place...so that a machinist can start to make it, or it can go down the footwear track line. So all that takes time and money and it's a question of balancing all that up against the risks of not getting your product, which I would say is the top thing you need to get.

INTERVIEWER: What about the quality in different countries... i.e. China, Vietnam, etc

PARTICIPANT: Like for like, I think the qualities the same in those particular markets. So it would come down to, 'that the two products, what is the price difference?' Okay? And then it's not just looking at it from an individual product point of view because there's not much point in me placing that product with you and then something over here, then something over here. What we prefer to do is place a bundle of styles with somebody so that we become more important to them, they become more important to us and what they'll then have is some lines where they have big quantities and some lines with medium and some lines with small. So we both make money on it but in different ways. And so you try and place a few different things with somebody rather than a one-off. We can put bundles in one country, but it's whether that country is suitable to that particular product category. So if you take the case of footwear, for instance, up until a few years ago all Indian footwear was leather. Now they import quite a lot of synthetics, principally from China and they're making more synthetic footwear that they can then ship out to wherever. From our point of view it extends the lead-time, so it makes it a little bit longer to get the product. The price is workable, the quality is workable and the minimums are workable. So it's then a question of balancing up what the right decision is to make between the two.

INTERVIEWER: I am also looking...the difference between something that's called 'manufacture brands' or wholesale, so they actually manufacture their own brands in their own right.

PARTICIPANT: A true brand as opposed to an own label brand is, so our own label brand, Sole [...] or [...] Soles, on the other hand, a manufacturers brand such as Clarke's, or a manufacturer's brand such as (Company J - Manufacturer brands) or whatever.

INTERVIEWER: I also want to know if it is different to manage an own brand and a (Company J - Manufacturer brands) brand or...

PARTICIPANT: Well yes, it is quite different in the sense of own label we would go through those exact steps... Whereas as part of the plan, we would leave a gap or open to buy, you might describe, for a certain number of styles or a budget to spend and we would then decide the brands that we want to spend it with. So if for instance, it was with

(Company J - Manufacturer brands) and we want to spend £X00,000 per annum with them, it would be then up to us to go into their showrooms and select from their ranges 'cause they put the ranges together and they sell those ranges out to the wholesale trade, which is what we're called. In terms of (Company J - Manufacturer brands), you're buying it probably from an office somewhere in the UK or Europe. They then manage the sourcing bit. But in the case of most of those manufacturer's brands – (Company J - Manufacturer brands) being an example – if you go back many years ago, they used to manufacture themselves. But because essentially they were no good at it and also the cost of manufacturing in the places that they were manufacturing it, for example the UK, it ended up that the cost and selling prices were prohibitive for them to sell it. So they then have to source it from different markets, add on a margin and then sell it to ourselves. We then have to decide if we can buy it at that price, add on our margin and sell it to the final consumer. On own label we control it right from the inception of the idea through to it turning up at shore to the cost price, to the selling price, to how many we've bought, the margin, you name it – colours, quantities, everything.

INTERVIEWER: and calculating the profit margin...

PARTICIPANT: Well, it depends on. There're lots of different ways to calculate a profit margin. You can do it in terms of cash, you can do it in terms of percentage. Okay, so if you say that you buy something for £10 and you sell it for £20 essentially, excluding the VAT, you've made £10 cash margin. In terms of percentage margin, you've made 100% because you've actually doubled the cost price, the selling price. So there are different ways of working out how your applied buying in margin comes about. As I say, that varies by product category. It also varies by retail group 'cause everybody tends to work things out quite differently, alright, whether they include the VAT or they don't include the VAT etc. etc. For instance, children's clothes don't have VAT other things do. So that's how we would look at the margin in order to achieve our target margins that we are pre-set right at the beginning of the planning stage. So with the own label, we would want to make more margin out of than a true brand. Because normally true brands, they have to make a margin. And therefore, you're buying through them. Own label, it's all yours.

INTERVIEWER: and what you understand by the term 'country of origin'...

PARTICIPANT: Country of origin? Where the product is manufactured or which country.

INTERVIEWER: Which country of origin dimension do you think is more important generally to a brand?

PARTICIPANT: I don't think there's anything one more than the other. It's all rolled up to the total thing.

INTERVIEWER: and does parts have any association with quality or.....

PARTICIPANT: Could be both. If you buy poor piece good, poor fabric, poor leather ...then it'll be poor. If you buy the best leather and it's manufactured or designed poorly, it'll be poor. So the two or three things are not mutually exclusive. They're all...They're all essential.

INTERVIEWER: How important do you think is the relationship between a brand and its country of origin from industry perspectives?

PARTICIPANT: It's crucial, that's the gel. Yeah. I mean, it's a quarter of a buyer's job. But it's probably the biggest quarter if that makes sense. A buyer basically has to pick products. They need to be able to buy it. Which means they need to source it. They then need to be able to sell it. And they need to be able to manage people. That's all they need to do. Okay? So you split it into four. The buying and the sourcing are bigger than a quarter but it's a crucial part of it. In terms of us getting our product, if we don't have the right product at the right prices on our shelves, then we won't sell at all. So in that point of view, it's absolutely critical.

INTERVIEWER: Okay. Can you think of any challenges that comes when association with country of manufacturing?

PARTICIPANT: There are challenges all the time. Well right down to the very basics of communication, and language, through to the distance. Through to each individual market have pluses and minuses to them.

INTERVIEWER: Can you give me an example?
PARTICIPANT: Yeah, okay. If you manufacture in Bangladesh or China or somewhere like that, you might have more risk of getting mould on the product by the time it gets into your house than you would from [unclear – 0:26:21.9]. because of the humidity of the air temperature.

INTERVIEWER: Yep. And how do you overcome that? Like you said, obviously it can get mould. How would you say...
PARTICIPANT: Well you have to expensively rectify it. If you actually can get it, though, out of the factory into your warehouse relatively quickly in the UK to diminish the risks. The longer it is in the hot country, particularly if it's sat around, the more chance it will sweat and get humid and get mould, for instance.

INTERVIEWER: And so how do you kind of deliver it quickly, like what are the procedures to make sure that it's quickly passed on?
PARTICIPANT: Well, essentially when it goes [unclear – 0:27:15.8] on a particular date, in the most cases it's up to the supplier to deliver it to a certain port. Okay? And then our transiting agents, our forwarding agents, it's up to them if it's not containerised already to contain it and put it on the first container ship out of there back to the UK to get it into our warehouse. As soon as it goes over the port rails... ..it then becomes our responsibility.

INTERVIEWER: Right. And would you say is it through shipping then, is it?
PARTICIPANT: It's 90%. If you think that we get a little bit of product that's trucked in from Spain, Portugal or Turkey and we get a little bit of product that's flown in. But to fly something in is extremely expensive. So 90% of the product comes in via ship.

INTERVIEWER: How important is country of brand origin to your company?
PARTICIPANT: When you say origin of brand, which brand?

INTERVIEWER: your company J, how important do you think...
PARTICIPANT: From a retail aspect point of view?

INTERVIEWER: Yes.
PARTICIPANT: Crucial.

INTERVIEWER: In what perspective, and why, of course?
PARTICIPANT: Your brand is what you are, isn't it? It defines who your customers are, everything you do from a marketing point of view, everything that you buy, what you do, your lines of communication. Pricing, the product that you might sell, your reputation, your history, and it's pretty crucial to the external consumer world and the external market.

INTERVIEWER: So is it because it's got a long history, would you say?
PARTICIPANT: It depends what brand you're talking about. So if you're specific about (Company J)s... it's more about how is that brand perceived by our customers or potential customers that we wish to service around the world, and then how do we wish it to be perceived and do the two things match or do we need to evolve it or change it or move it forward?

INTERVIEWER: And do you think UK heritage is important to a brand?
PARTICIPANT: It depends. It depends, doesn't it? I mean, what are the biggest brands out there in the UK market? Like Nike, Coca-Cola, but there's no UK heritage with them...but they are the biggest brands...and that's what's most important to them. So from their point of view, I would say UK heritage is irrelevant. From our point of view, we don't really play it up as being that important, to be honest. And certainly we don't play it up in foreign markets. Some people who might sell in America will play on their Englishness or Britishness. I don't think we particularly do.

INTERVIEWER: and the impact of country of origin....

PARTICIPANT: Mm. Not sure. I mean, essentially the further east you go, the cheaper the prices that there are, but again, it depends on which markets you source out of. So if you're planning... It depends. The selling price is the selling price that you think you can get for the product so it tends not to influence the selling price as much as it does upon the margin you can make upon something. Compared to buying something from India or China or wherever, compared to buying something from Portugal or Italy. The price is likely to be more. Is it a complete like-for-like? Probably not, but then unless you are trying to quote against that, a similar type product might cost more but if you can only sell it for £30, you can only sell it for £30. What gives is the margin.

INTERVIEWER: Right. So you'd say if there's a change in the currency, for example, or dollars are going up or down Would that or not change the retail pricing but you're saying that it influences the profit margin?

PARTICIPANT: Yeah. It's the profit margin, yeah. So for instance, if the dollar rate has worsened by 6% in the last six months... if I'm buying from a manufacturer and I can buy that same product 6% cheaper... ..then actually it's the same price. So therefore I don't even have to think about passing anything onto the customer and my margin's remained.

INTERVIEWER: Yeah. Okay. And in terms of sourcing, a few questions. Would you say that your company is...

PARTICIPANT: We don't own any manufacturing...

INTERVIEWER: What about your company's branding, then, the name and the look association...

PARTICIPANT: Well the look changes every ten minutes but the actual brand name has been around since 1875. We have 42 different trading titles here. So you've got lots of different brand names... ..which we've either grown up organically from nothing and started from scratch... ..or we've acquired from somebody else, such as High and Mighty, for instance, when it went into bankruptcy, or Fig Leaves or something like that.

INTERVIEWER: Okay. And you've talked about the changes in the company, like i.e. you're changing the market as well, I'm presuming, the consumer...

PARTICIPANT: You're probably better off speaking to the marketing people there but essentially what they need to do is if you've got a current set of customers and you either want to move to a different set of customers or you want to acquire some customers to make the thing broader appeal, then essentially the marketers have to go out and recruit new customers to the new profile. So either within the same brand name or produce another brand name to do that. So an example might be, up until thirteen, fourteen years ago, (Company J - Sub Brand) didn't exist. Okay? So we decided to go for a younger customer that was more fashionable, still larger sizes, etc., etc., etc., so we came up with (Company J - Sub Brand). Marketing would come up with the name and the concept and the target, this, that and the other. And going back to the conversation on buying, we would have that knowledge in terms of who we were going out to buy product for that was suitable for that particular customer. We'd do it in the same way as I've just described... ..but it would be different because it's for a different brand.

INTERVIEWER: So I know when you talked about...previously said when you were sourcing products you could only source 200 million products?

PARTICIPANT: That was quota.

INTERVIEWER: Yes, quota, sorry and then how it changed to GSP, did you say?

PARTICIPANT: No. Quota went on and then to off.

INTERVIEWER: Do you know why it changed?

PARTICIPANT: Yeah, because the world wanted cheap products and they wanted more Chinese products and then the political environment changed because China was no longer *persona non grata*. People accepted China. Okay? So they took the quota off China, because also at the same time our domestic around the EEC manufacturing capabilities had reduced anyway. So although we were afraid of Chinese imports flooding the market and becoming cheap Chinese imports that we couldn't match, actually we couldn't make the gear anyway. And that didn't matter whether it was clothing, fabric, shoes, cookers, you name it. So eventually the world brought on China, so quota was abolished. In terms of the other thing that we talked about, the World Trade Organisation together with the EEC... ..decide – and politicians – how the general system of reference should work and what should incentivise buying companies and countries to source from other countries. So there are all sorts of different ways but one of the biggest ways is messing around with the duty rate... ..which is the import tax on anything that comes into the UK. So it's two quite different things, really.

INTERVIEWER: Do you think that they're bringing manufacturing back into the UK?

PARTICIPANT: Yeah, I think they'll try. I mean, have you heard of the Alliance Project? Okay, so yes, I think they'll try and do that. If you went to Hotter... ..and had a look there, they're actually manufacturing shoes in the UK. So they're manufacturing 40,000 pairs of shoes a week in the UK in Skelmersdale. They've been more and more trying to do that. There's a lot of people down in the south trying to do fast fashion, particularly on ladies wear and clothing and this, that and the other. So there will be a move towards the UK manufacturing more on clothing and footwear. Whether it will be a great swing or not is a real question mark because the skill sets have moved away from us... ..and we have the issues that China have now in terms of our labour rates are expensive. And quite frankly, most of our labour doesn't want to work in a factory. And that's the change that's going on in China at the moment. So it'll happen but it'll be very, very slow. Everything will be very highly publicised but it will be slower than the reality.

INTERVIEWER: And in terms of sale, do you think it's going to affect the sale of bringing 'Made in UK' back or not?

PARTICIPANT: No.

INTERVIEWER: Do you think it's going to change the UK consumers' perception at all?

PARTICIPANT: No.

INTERVIEWER: No. So you think it's more from a fast fashion perspective?

PARTICIPANT: I think there's an element of, 'It's a nice thing to do for the country.' And I think from a selling point of view it might have an advantage for minimum order quantities. It might have an advantage from a lead time point of view. And it might have an advantage from a fashion point of view. If they can make the product.

INTERVIEWER: What do you mean, fashion? Do you mean the style or...

PARTICIPANT: I mean fashion, fashion.

INTERVIEWER: And any of these elements that you think kind of impacts a brand image? Which elements of country of origin do you think is more effective to a brand image?

PARTICIPANT: None.

INTERVIEWER: None? Do you think the material of the fabric influences the brand image or is there any...

PARTICIPANT: Yes but that's different. You can get that from whichever market you buy it from. If that reflects the product, which will reflect the brand image, but actually where you get it made, my view is that 99,9% of people in this country don't actually know where their gears are made. And even when they do, or even when it's highlighted at its worst aspects, people don't care.

INTERVIEWER: Do use these COO as a promotional tool?

PARTICIPANT: Not that I am aware of, but this is something you need to check with the marketing department.

INTERVIEWER: So do you think it's the design of the product or do you think it's the material? Which one do you think is more reflected to a...in terms of brand image? Is it the quality of the material or is it the design or...

PARTICIPANT: It's the whole package.

INTERVIEWER: Do use these as a promotional tool?

PARTICIPANT: Not that I am aware of, but this is something you need to check with the marketing department.

INTERVIEWER: So it's not just one element, you're saying?

PARTICIPANT: No, I think it's more complicated than that.

INTERVIEWER: International market as well. You said your company's going more towards international markets.

PARTICIPANT: America, yeah.

INTERVIEWER: America, okay. And how are you going towards America? Is there a particular strategy that you're using for international expansion?

PARTICIPANT: Yeah. I mean, we've got an agent in America who are trying to either acquire lists of people who are more likely to buy off the internet or we do it through third parties where we acquire those lists of people that previously have bought from our competitors off the internet and literally we do it through the internet and email and a little bit of postage which will (Company J - Sub Brand) catalogue, speculatively.

INTERVIEWER: Okay, and do you think that the country of origin, with (Company J)s being a UK brand, has impact on international market?

PARTICIPANT: It could be if it was a selling feature. It currently isn't cause at the moment we're all about (Company J - Sub Brand). At the moment, marketers haven't used that as part of our heritage. So is it an option for us to do in the future? Yes, possibly. Other brands in America have definitely used the English image massively. Okay? Whether we would use it or not, don't know. Is it the most important thing for us? Probably not.

Company K1: Assistant Buyer

INTERVIEWER: Could you please tell me about your role and what it involves?

PARTICIPANT: Assistant buyer on ladies wears. Within (Company K) it's very much of a clerical position. There are not a lot of hands on with regards to the selection of the range, so from initiation of products you would get involved with looking at new seasons, so you would look at catalogues, books, the internet, and obviously what is out there, trends, predictions, look colours and everything else, just getting a better feel for what's happening in the market. We then sit down with the buyer and obviously work through ideas of what's done well, we analysis of the book that is currently out, because that would be comparable to the season, so we look at figures, look at what is doing well, so if something is not doing well then look at product to replace, that has probably got a current trend element to move it forward.

So that is the initiation of the range, the buyer would then go out shopping and would buy the garments, and then bring them back and would then fit them into the models, so they would then try the garments on, fit the garments to our block, because in the industry the sizes are so wide, so we have obviously got our certain blocks. So we would fit the garments, and see what details, to see if we want it on the garments, so the designers would do their specs, we would do a brief, which is a picture of a garment specifying the details we want, sizes, buttons and you know the labels, it should be everything else, so that is then colored up, and the brief is sent out with the size spec to the Far East, which has just gone at the moment.. And then, the buyer, who is out in Hong Kong at the moment, follows that up. So she is now negotiating prices, we do some negotiation prices as well, but at the end of the day it is not our final say, so we work with UK suppliers, well more like agents, the factories are out in the Far East. So we would have some input on negotiating the prices, after prices have been confirmed, we have what is called a purchase sheet, so it is very clerical, we have to fill in, and obviously, that is then set up on the internal system to then generate a product code, we would with creative team then do line drawings of how the product is going to look on the page, so that is a hero shot... So we say we will have a blazer here, so that would be our hero shot. So if we would like trousers on the other side, she would do a line drawing on how that would look in a book, so like I said it's very clerical.

INTERVIEWER: So about (Company K) what your say about the brand?

PARTICIPANT: It is aimed at the older customer, I would say 60 or 55, up to 60 +, we are online to bring it down to an online sale, trying to recruit younger customer, but generally it is the older customer. At this moment in time, telephone sale is higher than online sales, which they are trying to change, I think because of the demographic of the customers. They are not used to ordering online, so they prefer to pick the telephone up and order. So the customer is probably someone who has retired, or looking to retire, has got that extra bit of disposal income. So yes, we are an older customer profile.

INTERVIEWER: So the services you provide?

PARTICIPANT: Online, the home shopping is telephone sale, catalogue, multi-channel strategy, have retail stores as well. Retail stores have in the past, it's very difficult to explain but they have split, we have a full price and we have outlets and the outlet stores use to carry a specific board range. So there was a buyer for that who would go out and buy the range specifically for it, and then we have a full price range, which is taken from the mail order book, so its not bought but selected from the mail order range. But we are finding that I suppose with the stock issue, I think it is more beneficial for us to have a full price, and using mail order products, and perhaps enhancing those products in store with few extra buys.

INTERVIEWER: So you sell anywhere else, such as department stores, or concessions?

PARTICIPANT: No, not in department stores, we are in the garden centers. I think there was talk about department stores, but I don't we work on that side at the moment. So I don't really know how they are rolling things out, but no, we tend to be on like Cheshire oaks, like have outlets, or be in Garden Center, or that type of boundary mills.

INTERVIEWER: So as a brand would you say (Company K) is a manufacturer/wholesale brand or a retail brand?

PARTICIPANT: Hmm, it's a difficult one; I would say a manufacturer actually. I think it's the heritage in all fairness, because they have been going for such a long time, but have always been, or were initially known for home shopping, so it has always been known through the book. So they are not known for, I wouldn't have thought for the retail type thing. It is a heritage because the two directors, well the two owners they use to play [...], so that is how this all started, they set up a, one of the guy is called [...], so both of them were England [...] captains, and they set up the brand (Company K). And primarily, they produced cotton products, [...] shirts, polo shirts and very sport oriented, that was the grasp roots basically, and that is how they started. So they just then developed the brand further.

So yes, I would say they are the manufacturer brand, because most people know this through [...], because they use to supply, not that they do anymore, I suppose its endorsement, but they use to do [...] kits for England, wales, so they had a really big fine on the rugby side of things, so people always knew (Company K) because of the [...], and then of course that is how it evolved. So I would say it was a manufacturing brand.

INTERVIEWER: So when you have touched upon manufacturing the cotton products, was this done in-house or?

PARTICIPANT: That I am not very much aware of, but I think it was local.

INTERVIEWER: And do you think customers see you as manufacturer now, or do they see you as a brand?

PARTICIPANT: Yes, as a brand. I don't think they see us as a retail brand, I think we are a brand, but I don't know whether you are getting the right information from me.

INTERVIEWER: So would you say there is still a difference between manufacturer brand and retail brand, or would you say things have blurred?

PARTICIPANT: I would say it is a bit of a grey area, because I think consumers, obviously, if you look at Barbour and those type of brands, they are on the high street now, they probably use to be in concessions, and it was very niche market, but now it's a bit broader, but then fashion and brands come and go don't they. You know Barbour was just all about the horsey people that would wear Barbour, but now it's a fashion thing, and it's a right thing to be seen wearing. But it's very, very difficult; people just see it as a brand,

INTERVIEWER: And why do you think there is a grey area?

PARTICIPANT: I think it's because they have broadened their consumer age group, but they have got too, definitely. I think they have got to look further these days in terms of sale, so yeah. They got to shoot in other avenues; so they can't just rely on their name alone, they have got to be out there on the high street and be seen. Yes, some people still like to go on the high street, so yes there needs to be representation there, but they need representation online as well.

INTERVIEWER: So the grey area is because....

PARTICIPANT: What I think is, it's because of the consumers. The consumers are looking for different things, technology and all those sorts of things. It's just moving at such a fast pace, so I think people have to keep up with it... So therefore, if they were just manufacturers or wholesale brand, they have to advertise online to obviously generate that extra demand.. So then they may have thought there is a possibility to be on the high street, so I think it's both, you have to move on with time, but it's also the consumers change in taste as well, as consumers way of buying and expectation have changed. Also, I think sometimes brands can't afford it so sometimes they tend to do a water down range to increase the sale, that is more affordable to everybody. But it's difficult to say anything because some companies have a small volume and high prices, and that's how you want to stay as a brand, but then if you want to grow your brand then you got to appeal to the wider market. I mean those brands are still the niche brands, as they are in Harvey nicks, and Selfridges, so you know, so yes they are on the high street, but they are not on the same type of high street, it's within the department stores, so, therefore, offering niche brands, so like Harvey nicks is known for selling niche brands isn't it. Expensive, and that doesn't have a shop on every

high street. Also, I don't think people differentiate much difference between manufacturer brand and retail brand, so yes, I think it has blurred.

INTERVIEWER: So is (Company K) focusing on own branding, or selling with other brands?

PARTICIPANT: No, we only sell our own products.

INTERVIEWER: So the shift and the changes from being a manufacturing to providing your own brand products on multi-channels and retail outlets, does this have any implication on managing a brand?

PARTICIPANT: No, I think people have grown with it. That's the thing, I think the customers have bought into it from the early stages, and they have grown with it. Plus the company has grown, and they are bringing expertise in, to broaden the field of selling. So No, there is no implication on the brand.

Also, I think it's a strong brand message at the end of the day, not any customer would pick up a supplement from a Sunday time or whatever else. There are also seen, I think the Garden Centre has made the brand name stronger.

INTERVIEWER: So what would you say is (Company K) is core brand message?

PARTICIPANT: Its quality and value for money, we are not high fashion. I wouldn't say we are high fashion, I mean that is what our customers are looking for, letters through from the customers saying that I have been wearing my [sports] top for don't know how many years, and it still looks good. That is what I think we are recognised for, and the customers will come back because they know that the quality is. So regardless of how many channels we operate in, the message would be the same.

INTERVIEWER: And the quality product.....

PARTICIPANT: I think the quality of the fabric and the make-up potentially, and the sizing- its not generous, but I would say its true fit.

INTERVIEWER: In your opinion, what do you understand by the term country of origin?

PARTICIPANT: Where the product is actually made, where the product is assembled because a lot of places say China, well not China, we had some people in from Bangladesh yesterday, and they would import printed elastic from China, but the country of origin would be Bangladesh.

INTERVIEWER: In your relation to your brand.....

PARTICIPANT: Yes, country of origin would be where it is made, even in relation to our brand. We have done a few things, don't think so much in here, but promoting the 'Made in the UK', so we do, so like jack wills is very much a brand that promotes the fact that it's all 'Made in the UK', so we did do some products that were Made in UK, but No. The country of origin is where the garment is originally made.

INTERVIEWER: So in terms of the product sourcing, and brand origin, how important do you think those elements are to your brand? COD, COB, COM

PARTICIPANT: Emm, I think it's more the quality, rather than anything else.

INTERVIEWER: So would you say your quality is associated to where its designed, the fabric or manufacturing?

PARTICIPANT: It's to do with the fabric.

INTERVIEWER: So do you promote where your fabrics are sourced?

PARTICIPANT: No, we don't, no we never promote that or the design.

INTERVIEWER: And is there anything in the fabric that sends out some sort of brand message?

PARTICIPANT: Emmm, I suppose not so much for, it depends, it's just that its shower proof, its waterproof, so those are things, and then on a lot of our polo shirts, it's got an anti curl collar so it's very much about the performance.

INTERVIEWER: So would you say the Country of origin is important to you as a brand or?
PARTICIPANT: I don't think the customers really, well the customers know that we are a UK based head office, but I don't think, I mean people now are more accepting as a fact that things are made in you know, offshore. Years and years ago, it was all very much the UK manufacturing based, but I think now most people know that things come from China. So I think that is why maybe Jack Wills have jumped on that all their things are made in the UK, but then you pay a premium price for it because its UK. So we are a UK based company, but customers do know that things are sourced. Personally, I am not quite sure if we put the country of origin on our labels anyway, because it's not a legal requirement, so I think customers are probably aware that we are UK business, but things are sourced in the Far East.

INTERVIEWER: And is there element within country of origin dimensions that is most important to you as a brand?
PARTICIPANT: I think because of our customer profile, demographically, I think people do still associate it with the British brand, because of the [sports] heritage.

INTERVIEWER: And is there any way you promote that heritage [sports] history?
PARTICIPANT: No we don't, you see, we still do [sports] stuff, and still have a [specific sports] range in our retail stores, and probably have couple of pages in the book, but that's about it, so no not that much now, which I think is sad really, maybe we are trying to move on to more fashion type brand, but as I said, because of our customer age group, I think its very much UK because of where was started at.

INTERVIEWER: Do you think for your customer country of brand origin is important?
PARTICIPANT: I would say to some of our customers, country of brand origin is important, because they have been brought up with it, and it's important I suppose, so yes their loyalty is towards how they have brought up.

INTERVIEWER: So in terms of which dimension is most credible to you, country of parts, country of design or Country have manufacturing?
PARTICIPANT: Country of parts, yes.

INTERVIEWER: How important (or not) do you think is a relationship between country of origin and its brand?
PARTICIPANT: It depends on what you are selling at the end of the day, what your message is. Some yes, and some no. It depends on what message you are trying to promote, like yes we are a UK-based Brand, but we are not promoting the fact that it's UK-based, it's a bit grey really.

INTERVIEWER: And what do you thing are the similarities between manufacturer or wholesale brands and retail brand?
PARTICIPANT: It's very hard to say, a manufacturer brand (wholesale) you are classing as a niche brand, but then retail brands you are classing as high Street brands, so the relationship I suppose, high street brands are suppose low ends, cost, I suppose multi higher turnover because it's cheaper, whereas, manufacturer or wholesale brands still wants to keep that niche part of the higher, premium brand, but then they have still got to be out there, because if they are not then they lose sales, so it's keeping their identity and making sure that they are not going to be classed as a quick sale, so still keeping the quality but not being available to everybody.

INTERVIEWER: What does your brand name say about your brand?
PARTICIPANT: I would say our brand name is what it says, its (Company K), which is quality and its value.

INTERVIEWER: So you're online and catalogue service, do you do this with other companies or are they under your own right?
PARTICIPANT: No, they are our own. So, let's say (Company K) considers expanding internationally, so of course its association will change. Obviously, they are looking to produce a new book, which is very much based on the feel of modern, so we are trying to recite younger customer, and maybe that is something marketing would look at, by going onto you know, but then it would have to be much more fashionable product, obviously, ASOS is

just an example, but a lot of brands might sell through NEXT or whatever. Well NEXT have got a huge, well small book now, with purely just brands in, so yes, that may be something marketing may look into, but yes, that is important, rather than keeping in within, because it broadens your selling power I suppose, so yes, it's important for a brand, but I think we need different products, potentially, to go to different areas, to be able to recruit different customers.

INTERVIEWER: And do you not think it would lose its heritage power?

PARTICIPANT: Yes, I think it would lose its heritage, but I suppose you can't be narrow minded. You got to look at different ways of actually developing a brand, and moving the brand forward, so yes, it would lose its identity and heritage.

INTERVIEWER: Do you carry out brand perception?

PARTICIPANT: No, marketing might do, but within our departments no we don't.

INTERVIEWER: How do you think country image impacts brand image?

PARTICIPANT: It depends on your customer, you have some customers that would only look out for Made in the UK, but not everyone is like that, so NO, I think people are accepting, but yes there is this small percentage that wants stuff made in UK, but it's only a small percentage, and I think people have grown with it. It's something didn't happen, but with time people have accepted. So No, I don't think it's an issue. So yes, we are a UK business but then it is sourced somewhere else.

INTERVIEWER: [specific sports] association.....

PARTICIPANT: So we have had some products made in the UK, and we have promoted that, [specific sports], of course. We don't do that much anymore. We do help for hero, which is in forefront of an older people, and also for younger people, so we do a lot of work for help for hero's, and we have a product range for them, and it's promotable UK thing, so the product is made somewhere else, but it is very much related to the UK.

INTERVIEWER: Any COO association on online service or catalogue...

PARTICIPANT: No, we don't. I suppose it's more a promotional on a fact that it's a half price offer, trying to get customers through, by offering customer half price, we have free gifts, so if they order over certain value then they get a free gift, so the promotion tend to be very much like that, not because it's UK or quality fabric, but we don't promote English association.

Company K2: Buyer

INTERVIEWER: Your role please?

PARTICIPANT: So I've been in the industry probably nearly 17 years now...

Uh-huh...and worked in lots of different types of companies, so... been in company K for 3 months, before this was in Topshop and many other brands.

INTERVIEWER: Lets discuss Topshop seeing you have worked there for couple of years.

INTERVIEWER: Would you say your brand is a retail or a manufacturer brand?

PARTICIPANT: What do you mean by retail brand though? I'm a bit confused what you mean by the difference in a manufacturing and a retail brand.

INTERVIEWER: THE DIFFERENCES HAD TO BE EXPLAINED TO THE RESPONDENT

PARTICIPANT: It's a bit complicated... I think...I think for me...that's a very simplistic term and it's...kind of...it's a very historic term and...and the UK market is very different now in the past fifteen years. Like you're talking about brands like historical kind of heritage brands that are heritage in England.....in a very different time.

INTERVIEWER: Is there an existence of manufacture brands or do people not even see the...?

PARTICIPANT: I don't think people see that. Although there's a real push now to kind of...I would say what you're equating to is...for me it's more like where something's being manufactured locally. So I would say from a buyer's perspective, everything kind of buying-wise has gone global.....and actually it went to the Far East. But now to give a brand a bit more kind of kudos, if you like, or an understanding that it's a more exclusive.....it's now being said to be manufactured back in the UK. River Island is doing it, Topshop do it. Um. And actually saying it's been made in the UK now means that people feel like they're getting more for their money. So...so it's kind of gone a bit full-circle, really. But I don't think it still has that same pulling power as what it maybe used to. 'Cause I think the major one that you might be...I don't know whether you're thinking it but M&S was always known to be...of M&S was always at a higher regard. But I think the problem is that retailers like Primark and Peacocks came into play.....and totally quashed the value of a garment... ..in terms of that you could get a similar garment but probably through...you know, less than half the price. So that shifted everybody's understanding of what they could buy. Topshop are not manufacturing, though. That's the difference. They don't have their own factories. Oh, well that's the whole Topshop.....um, that's their lifespan of a garment, you know?

That's the other side of it, is that you have real heritage brands that don't move on that much. So like you said – Burberry, the trench. It's just...their whole brand is based on that one item. Topshop, they're...they came onto the market and it was all about fast fashion. So it was hitting that kind of younger consumer that isn't bothered about quality. It's about having that garment, that trend in an instant. But you've got to realise that the whole social media became part of that as well. So when I first started buying, the whole life cycle of a trend was a year. So it came from the catwalk and it would take a year to hit the high street... ..purely because you didn't have computers. You were reliant on publications of the catwalks coming out. That then had to filter and you had to manufacture it, so it actually took a year, whereas now a catwalk to high street can take two months. If not less.

INTERVIEWER: But are they still manufacturing, would you say, globally, though? Or are...

PARTICIPANT: Topshop, yeah.

INTERVIEWER: Yeah. Isn't that like finishing? Because part of it sometimes still says 'Made in Britain'.

PARTICIPANT: Yes, that's Leicester.

INTERVIEWER: But are they actually manufacturing some of the products in the UK for those...

PARTICIPANT: Yes, but the fabric might not be UK. So your fabric could still be from China.....but then it's finished in the UK. Um. But it all depends on your product type.

INTERVIEWER: what is the purpose behind the globalisation of a fashion brands.

PARTICIPANT: 'Cause of cost. It's all to do with cost. You know, even, even 17 years, when I first started, I remember visiting fabric mills in Yorkshire. Leicester and Nottingham was known for lingerie and producing lace. But it was just purely cost. So you can do it from a designer point of view...because you can govern a higher price point. But you could never do it from high street point of view. That's why China opened up and the whole Far East manufacturing. But like, obviously but then you have, obviously, so that shifted, obviously, like...: ...these sorts of manufacturers or brands obviously took their UNCLEAR [0:12:07.1] and then obviously started UNCLEAR brands.

INTERVIEWER: But then you have high street brands saying...so manufacture brands have still got a small amount, obviously...

PARTICIPANT: Yes.

INTERVIEWER: ...but now you have retail brands have a small proportion that is assembled...

PARTICIPANT: Assembled and...yeah.

INTERVIEWER: ...in the UK.

PARTICIPANT: Yeah, yeah.

INTERVIEWER: So how...what...so in terms of...

PARTICIPANT: But...I know what you mean.

INTERVIEWER: Is there still...would you still say there is a difference or would you say, in terms of quality...

PARTICIPANT: In terms of quality yes, because you're talking about...again, if you're looking at, say, Topshop or River Island making out of Leicester...

INTERVIEWER: Yeah.

PARTICIPANT: ...as opposed to Burberry, they don't have that...I don't even think they have that factory any more, do they, but that was, like, Gloucester. But you'd have a mill making the fabric and then you'd have very...just the whole construction of the garment...

INTERVIEWER: Construction of the garment.

PARTICIPANT: ...requires different seamstresses and different production...makeup. Whereas Leicester, in terms of the garments they make, even though it's getting better, it's very basic pattern...it's jersey-based. It's not your wovens or your knitwear. You do a little bit of knitwear, actually, but you're limited to certain fibres and patterns. Just because of the capabilities of those factories.

INTERVIEWER: Yeah. So would you say the fabric has probably got more cost that you know, in terms of cost? Would you say it's the fabric that has probably got more cost, in terms of woollen sourcing, would you say?

PARTICIPANT: See what's happened now is that the UK and say somebody like UNCLEAR [0:13:54.7], like Turkey...

INTERVIEWER: Yeah.

PARTICIPANT: ...because of exchange rates, because of labour... China's becoming more expensive so it's making Europe look more...appealing. Whereas at one point labour was so cheap in the Far East. So things kind of start shifting. They're always changing. So...and cotton prices could go up because you've had a really bad or really good crop year.....so all these factors affect where you're choosing to manufacture.And that's the same for whether you're a manufacturing brand or whether you're a retail brand.

INTERVIEWER: A retail brand. Yeah.

PARTICIPANT: Actually it's all very similar. I would say the other kind of major factor is that a manufacturing brand, which is probably more of a design-led brand.....as well. So you probably have more cost implications in terms of all

the lovely components that you can add in...and all your trim details and the fact that it's design-led is spending more time on that particular garment.

INTERVIEWER: So would you say the difference between a retail brand and manufacture brand would be that manufacture brand's more design-led?

PARTICIPANT: I would say it's more design-led. However, that's why you then have Topshop saying, 'No you know what? We're going to go on the catwalk.' 'You know what? We're going to have a boutique and a unique range...to compete with the design brands.' So I just think there's...there's not...there's not a huge amount of difference anymore. The only difference is the cost of the garment and the time put into that garment.

INTERVIEWER: Yeah. So there's the cost and the time put in. Okay. I'm just going to go through these questions again.

PARTICIPANT: So for example...sorry, I'm just thinking on now.

INTERVIEWER: No, it's fine.

PARTICIPANT: So if for example you were a designer brand...

INTERVIEWER: Yeah.

PARTICIPANT: ...you would have no question about going, 'Right, we'll go to Italy for the fabric.'

INTERVIEWER: Yeah.

PARTICIPANT: 'We won't go to China 'cause we know we can get a higher quality of tailored fabric from Italy.' 'Oh, we're doing footwear. Well we're going to go to Italy. We won't go to South America. 'It's affording a different quality and a different level of almost, um, sticking with true traditions of what that country did.

INTERVIEWER: Does the shift of retail brand into manufacturing brand have any implication on managing the brand itself?'

PARTICIPANT: It's a total grey area now. I don't know whether there is such a clear divide. Unless you go into very niche...you're talking about very niche brands.

INTERVIEWER: Yeah. [pause] But in terms of Topshop, though...

PARTICIPANT: Topshop, I think...I think it's...Topshop has...has to evolve and constantly compete because of globalisation. I would almost say the missing factor in all this is social media. Everybody has an internet, everybody can see what's going on in other countries. You can now order products from Australia and America. So brands now, whether you're a Topshop or a Burberry.....constantly have to think how they can compete in a global market...

INTERVIEWER: Global market.

PARTICIPANT: ...not a localised market.

INTERVIEWER: They were all on their own under their own retailers, whereas now they've started going into department stores – Selfridges.

PARTICIPANT: Yes.

INTERVIEWER: So they've started having little concessions.

PARTICIPANT: Even Primark's in Selfridges.

INTERVIEWER: Yeah. So do you think that has had...how does that...having an impact on managing the brand? Do you think it is had any impact on the brand?

PARTICIPANT: I think it has an impact on the...probably the higher price point brands.

INTERVIEWER: Okay.

PARTICIPANT: I think [pause]...I actually think the...it's almost there's three different steps for me. You have your low-end retailers that are very fast-moving, are constantly wanting to pull in the customer. You have your middle market, which is your M&S and Next. I think they've been hit the most because people are either going high-end and buying one-off things not as often. Or you now have your discounters and your Primark and everything...and going, 'Right, well we'll just get what we need for now.' And it's become so throwaway. Um. So I think the fact that people's appetite and boredom threshold is so low now...that Topshop and Primark going into Selfridges, um, you know, it's pushing the effect on brands like, say, All Saints and stuff, that are almost too high a price point, don't change their range enough, so they're not kind of keeping that appetite of customers going in. And the other thing is there's no loyalty. Nobody has a loyalty to certain brands anymore. Everybody shops around. So it's this kind of, um, constant...it's like keeping up a constant excitement.

INTERVIEWER: Yeah. But do you think it's kind of having a positive impact or would you say it's kind of...it's kind of...as a brand...

PARTICIPANT: I just think the UK market's become so competitive. I think it's positive in one sense, that only the strongest survive. I think it's also opened up a whole new opportunity with the Internet. You don't have to be a store. You could just be an internet retailer. So the competition's positive in that way...and it's almost opened up a positive for independent small businesses again. Um, but the negative is that it's become...because it's become so throwaway, cost prices are really down. I think people's understanding and value of fashion has totally changed.

INTERVIEWER: Okay, so there's a lot...so there are...you would say there are negative and positive...

PARTICIPANT: Yeah, I think that things have to evolve all the time. Um, and actually the UK out of all the countries is a pretty fierce and healthy market. And the UK generally is good at fashion.

INTERVIEWER: That's true. So in your opinion, what do you understand by 'country of origin'?

PARTICIPANT: What do I understand about it?

INTERVIEWER: Country...what does 'country of origin' mean to you?

PARTICIPANT: Where I make the product.

INTERVIEWER: So is it where the product is assembled or...?

PARTICIPANT: Yes.

INTERVIEWER: And why are you associating this with made in?

PARTICIPANT: Because the country of origin could mean where the fabric's made, but generally I would say the country of origin is the production of that garment.

INTERVIEWER: But is there any particular reason why you would use where it's made and not where the fabric is from?

PARTICIPANT: Because you could have a country of origin for your fabric, you could have a country of origin for all your trims...

INTERVIEWER: Yeah.

PARTICIPANT: And it's just a buyer term.

INTERVIEWER: Yeah.

PARTICIPANT: So when you're doing your order, it's all...you're dealing with a supplier or a manufacturer and it's the country of origin of them.

INTERVIEWER: Okay, so let's put manufacturing because...okay. Is...but does it not have to do with any legal definition, does it?

PARTICIPANT: You don't even have to write country of origin on your care labels anymore. So it's just...uh, there's no...yeah, you need to legally know where you're paying your duty and your taxes from...and actually that is the manufacturer. He is responsible for bringing the fabric in and everything.

INTERVIEWER: Yep. And...sorry, one last...

PARTICIPANT: Unless you're a different type of buyer and you're a different type of setup. So say Next. They buy their own fabric. So do M&S. So they would source and buy their own fabric. But they would also have a manufacturer. So they might bring the fabric in but then send it back out again...so actually, a country of origin might mean something very different.

INTERVIEWER: Which country of origin dimension do you think is relevant to Arcadia Topshop, which one would you say is more relevant?

PARTICIPANT: Um...

INTERVIEWER: Which one do you see them hyping up more about? Do you think that they'd probably hype, shout out more about...

PARTICIPANT: I would say that they're a British brand.

INTERVIEWER: Just a British brand.

PARTICIPANT: Yeah.

INTERVIEWER: So do you think that would be the most important element of country...

PARTICIPANT: For marketing their brand, yeah.

INTERVIEWER: So it's country of...it's the fact that it's an English brand which is...

PARTICIPANT: Yeah.

INTERVIEWER: 'Which dimension of 'country of origin' or dimension of country UNCLEAR [0:25:17.4] to your brand UNCLEAR.

PARTICIPANT: Well Cotton...I'd say from a [...] Traders point of view, I'd say that it's a UK brand.

INTERVIEWER: Yeah, so [...] Traders it's to do with...

PARTICIPANT: But theirs is to do with the history of sport.

INTERVIEWER: Yeah.

PARTICIPANT: It's a very different thing.

INTERVIEWER: And that's not the same with Topshop, is it?

PARTICIPANT: No. Topshop are fast fashion. It's a very different model.

INTERVIEWER: Yeah. And so...how important or not do you think is the relationship between its brand and its country of origin? In general.

PARTICIPANT: Very important.

INTERVIEWER: And why is that?

PARTICIPANT: Again, it's a very general term, that. 'Cause I think each...I don't know. It depends on what the brand has been based upon and how it was set up. Or a lot of it depends on...I don't know. I think that's a general...

INTERVIEWER: obviously you talked about what's the relationship between manufacture brands and retail brands. Now in terms of... changes happening, for example: you said, the countrified brand origin is probably more important than the meeting to the brand itself. Um, has it had any impact when it's moved to department stores?

PARTICIPANT: I don't think its affected Topshop at all because it's...people know what Topshop is globally. They have that recognition already there. So it's not going to affect them whether they go into Selfridges or other department stores, unless they weirdly went into a John Lewis or something. But um...

INTERVIEWER: Do you think that they're seen as more of an international brand now, would you say?

PARTICIPANT: Yeah, totally. That's how they've marketed themselves by going internationally.

INTERVIEWER: Okay. And, um...so yeah, we've got most of this. What I'm going to say now is, just brand perception.

PARTICIPANT: Topshop? Yeah. They're one of those retailers that have created the whole brand identity...by...as being a cool, trend-led, um, affordable retailer. No one else really competes with them at the moment, apart from River Island.

INTERVIEWER: Okay. And what other results are...well how would you say...how would you UNCLEAR [0:28:36.9] perceptions? Is there any particular method you're using or...?

PARTICIPANT: Well catwalk-led. So their whole model is set up with the fact that you could get the catwalk trends and, uh...they're just trend-led fashion. But I think what's helped them again is social media.

INTERVIEWER: Yeah.

PARTICIPANT: The whole bloggers and the fact that they get well-known faces, global, well-known kind of cool models to do their promotion. They're very good at PR.

INTERVIEWER: Oh, okay. And how are the results or outcomes of this research or brand perception used to develop branding strategies, would you say? How did they use them to plan their branding strategies?

PARTICIPANT: How do they use what, sorry?

INTERVIEWER: How is brand perception measured in your company?

PARTICIPANT: I don't know. That's a marketing question you'd have to ask.

INTERVIEWER: Okay. how do you think a country image has an impact on a brand image? So your country image is obviously there's a lot made in China, made in...do you think...

PARTICIPANT: It only affects it when there's something going on. So recently it was the Angora...so if there's animal cruelty obviously. If there is, say, a programme on manufacturing and slave labour or obviously Bangladesh recently.

INTERVIEWER: Yeah.

PARTICIPANT: That's when it'll affect a brand. Uh, but generally the general public don't care! They don't care where it's made, as long as it's the right price.

INTERVIEWER: Could you think of other ways a brand part of their service emphasises our country of origin? So you have, obviously you've got a 'Made in China' and you have...is there any other way Topshop associates with the whole British association? Anything to do with British association?

PARTICIPANT: So they do. They put 'Made in the UK'.

INTERVIEWER: Yeah? Is there anything to do with their celebrity, music, anything that they do...

PARTICIPANT: Well they used to have Kate Moss, didn't they? To promote it. So that was the...you couldn't get more of a...

INTERVIEWER: Yeah.

PARTICIPANT: ...quintessential British, you know, famous face. I don't they do anything else other than that. Because I don't think they...even though they want to be known to be a British brand, because they're now global...

INTERVIEWER: Yeah.

PARTICIPANT: ...again I don't think...I don't know whether that is the most pinnacle thing that they concentrate on.

INTERVIEWER: Okay. Um, obviously...

PARTICIPANT: I think for them a lot of it's celeb. I think this is the other thing about social media. I think if you get bought by celebrities. Most girls will read *Look* magazine, that you want to be dressing like a celebrity.

INTERVIEWER: Yeah.

PARTICIPANT: So what they've managed to do is most celebrities will wear designer wear.

INTERVIEWER: Yeah.

PARTICIPANT: Well they've managed to be included in that mix...

INTERVIEWER: Yeah.

PARTICIPANT: ...which is the best kind of PR possible.

INTERVIEWER: Mm. And how do you think...in terms of brand messages, though, they don't have any...we talked about brand message. What would you say is...just in simple words?

PARTICIPANT: Don't know. You'd have to look that up.

INTERVIEWER: Okay. Do you think all this country of origin has any impact on a brand message at all? The whole, the 'Made in Britain'...

PARTICIPANT: Burberry still stand by that, don't they?

INTERVIEWER: Yep.

PARTICIPANT: So do M&S. Probably.

INTERVIEWER: But would you say for Topshop...

PARTICIPANT: It doesn't matter.

INTERVIEWER: So it doesn't. Okay.

PARTICIPANT: Because you're getting a consumer that doesn't care. I would say that...that...it's an older customer that has really always stood by that value. The Topshop girl, it's not about that. She wants to look good. She's not bothered where it's made.

INTERVIEWER: But where it says, 'Made in Britain', so you've got a very small proportion that is manufactured...

PARTICIPANT: Well although they've tested...they've tested that out and River Island have done as well and I think it's another...it's a POS, so it's a point of sale. So I guess if you're walking through the store, it might just catch your eye. 'Oh right, that's made in Britain.' So you stop and look at the garment. I don't think it necessarily means...that you're going to buy it because of that. It's just an added value.

INTERVIEWER: So you'd just put it down as point of sale or added...

PARTICIPANT: Point of sale, yeah.

INTERVIEWER: Thank you so much.

PARTICIPANT: You're welcome.

Company L: President of Apparel and Footwear

PARTICIPANT: So (Company L) have two divisions, there is what we call a craft division, which is a handy craft and haberdashery products for the consumers. So that is called craft divisions.

PARTICIPANT: And then there is our industrial division, which we are basically components suppliers for the two things, for the apparel footwear industries and secondly what we have is a specialty business, which gets into all sorts of parachutes, or car seats, or underwater caballing, and all sorts of special stuff, engineered the yarns in the specialty, so that's the industrial division, and my role is the head of what we call of apparel footwear, which is basically the core of the business, and it's the thread, sewing threads.

PARTICIPANT: So in our industrial division we sell sewing threads, we sell engineered yarns, we sell zip, and we sell some trim products. So I run the thread part of into the apparel footwear. And we sell into apparel footwear, but also accessories, so some people make handbags, and luggage kind of things.

PARTICIPANT: So what is my role, my role is the head of that, but my role really is within two things, which is the strategy side, its the customer interface side, and I guess that's the two bits, and then the customer interface covers product, marketing, sales, margins, pricing, and so I have a responsibility for the global sales and the profitably. That's how that is done, and then we have all our factories around, well I think we have got 70 factories around the world, supplying to the industry.

INTERVIEWER: And are these factories based in UK, or are these overseas?

PARTICIPANT: No, no we don't have any left in UK. There is not much selling in UK anymore. So, well I would guess that about, still about 70% of the world production is in Asia. So our factories are generally in Asia, but they also go through from North Africa, to South Africa, in the states and all the through to Latin American, and we got two in Pakistan, one in Lahore and one in Karachi, I think.

INTERVIEWER: And (Company L), would you say it's a supplier or.....

PARTICIPANT: No, we are what you call Tier 2 suppliers, we supply, I am talking about industrial division, so for example, if you are a brand, like 'Monsoon' or whatever, so you will be sourcing your clothes, and we will supply your suppliers. So we will supply them threads, zips and trims, and they would use that to make the clothes. 4.27

PARTICIPANT: So your members, your factories or tier 1 suppliers, and we are the tier 2 suppliers. So yes, that is basically what we do, that is our role in the supply chain.

INTERVIEWER: and would you class your company as a brand as well?

PARTICIPANT: Yes, I think so. But it's a business-to-business brand, not a consumer brand. The normal consumer wouldn't know who we are. The way we approach our market is that we talk about managing demand and supply, so we will make a sell, if you like, to the brands, so monsoon, Nike, Michael Kors, or whoever it is, so we ran a what we call a global accounts program with those brands, so it could be Burberry, or M&S, or whoever, and we sell the benefits to them off good components. In our case the benefits of working with our threads, our zips and our trims, and what, then they basically influence in one way or the other. They influence their suppliers to use our products, so we manage the demand side, but these guys don't buy anything from us, they just say 'Mr. manufacturers can you please use this'... they don't actually buy it, and then we manage the supply side, which are the manufacturers, the people making the clothes, and they are our direct customers if you like. So they are the ones who buy it from us.

INTERVIEWER: So a lot of manufacturers have moved in becoming brands, and a lot of brands have moved into retailing, what's your input on that?

PARTICIPANT: ok, so this kind of goes round in a circle. So you would see people – so you basically many years ago, you would have had manufacturers in the West and they would have been manufacturing themselves for their brands and then selling it. Making the shirt, or making the suit, so they would have had their factories, and they would

be selling their shirt or suit into the market. About 20 years ago the cost of manufacturing became so high, that these guys had to do something about that, so they basically relocated offshore, to various places. Some of them set up their own factories, so they basically moved their factories from here to here, but the vast majority just outsourced it all. So they stopped becoming manufacturers and became just sales brand, and they sourced their production. So all of a sudden these entire manufacturers who were selling became sourcing companies and marketing companies. So then some of them, let's take Adidas for example, so then Adidas who sells a lot through wholesale would then decide, oh well actually we might have our own stores. So they would go forward, or develop into stores as well, so all of the sudden Adidas is a retailer as well, that is being a brand, but it hasn't got its own manufacturing, so it's all kind of changed. That is just an example. And then you will see, so that was a brand becoming a retailer, and then you still see a brand that has a mixture of having their own manufacturing plus source operating, (Barbour and Henri Lloyd), so VF clothing, Van dale for example, so they would have their own factories, but they would also have sourcing factories, Levis would have their own factories, but would also have source factories, but Levis would also be a retailer, so would have its own stores.

Then later on you have got a rise of the big retailers, so somebody like Tesco in UK or Walmart, or someone like KMart in states, so they decide that oh instead of buying clothes from these other guys, we don't we have our own brand, so Tesco has F&F, so they have suddenly become not only a retailer but a brand owner. So, all of the above, and everyone does a mix of them all, but its becoming quite difficult to separate them out, as to what is what. So like C&A, what is C&A?, so C&A is a Germany COMPANY, they are a retailer, but they are also a brand, so, it's a bit of a mix. Now have you heard of monsoon? Would you say it's a retailer or a brand?

INTERVIEWER: I would say a retailer....

PARTICIPANT: Well, it's a brand actually. Does it have its own retail? Could be. So if you talk about retail and brands, that border is becoming a pretty poor of a case, it's a bit difficult to tell one from the other. But you will certainly see retail, big retailers trying to develop into being brands as well. You will also see the old manufacturers, not being a manufacturer, being sourcing and marketing companies and then them going into retailing as well, so it has become much more fluid.

INTERVIEWER: And what would you say is the purpose behind manufacturers brands moving into retailing?

PARTICIPANT: Because the margins are high... you got more control over your products, your merchandising, and you brand equity. If you just sell to wholesale, that's ok, because maybe you don't know anything about retailing. But if you sell to wholesale, you lose the control a little bit of what's going on. As for puma, so puma has been selling through supermarket and all sorts of stuff, and they lost control over their own distribution, so they never tried to back out of that. For going into retailing yourself, it gives you more control, gives you potentially higher margin, give you more control certainly on your brands position, on the other hand its very expensive, and if you don't know what you are doing.

INTVIEWEE: And can you please explain how is it expensive?

PARTICIPANT: If you are a manufacturer, a brand, and you don't retail, and then you say "oh I got an idea, let me go and do a retailing". And then you got to go and find the location, rents are pretty huge, then you got to go get your IT systems, then you got to do your merchandising, got to get and get the staff. You know if you are the brand you don't do all that, someone else does it for you, so the cost quite high, and then if you do it right then what you are doing as a retailer, then you lose a fortune, retailers now they do, but not everybody else does.

INTERVIEWER: And do you think manufacturer brands (or wholesale brands) going into retail impacts brand's identity in any context?

PARTICIPANT: Well it's up to them, some people do some people don't. To be honest, there are, we work with about 5000 brands, and about 50,000 in factories, and there are a lot and lots of menu's and different ways people do this, I

don't think you could say, this use to be like this and now it's like that, lots of people use different business models.

INTERVIEWER: So like a manufacturer brand goes into retailing do you think its effects the brands premium image in any context?

PARTICIPANT: No, Not at all, why do you think that? So let's say Michael Kors, do you know Michael kors?

INTERVIEWER: Yes...

PARTICIPANT: Ok, so you buy a handbag for \$6000 US or something, So let's say Michael Kors opens up its retailing, doesn't mean it. Obviously, they can't open a corner shop for two dollars. You know all their retailing would reflect the brand values and the brand position. So Burberry does its own retailing, you wouldn't think Burberry has lost its brand identity would you.

INTERVIEWER: But do you think it impacts its brand image?

PARTICIPANT: Depends how they are doing their retailing, if they are doing it properly then it can support the brand image. Or if they do it wrong then it might affect you know...

INTERVIEWER: But you can't tell if Superdry is a premium brand or a high street brand?

PARTICIPANT: well, that is Superdry that is interesting. But that is for something for Superdry to think about. But that is a branding question that has not got much to do with manufacturers moving into retailing. And I don't think Superdry were ever manufacturers were they. So they were manufacturers, and then they developed their brand, and they have been actually really successful, so that is pretty good, and then they have gone into retailing, but I can't say whether their identity is a bit unclear, but they have certainly created some great result, a very good company. Have they certainly created a brand?

INTERVIEWER: so there has been a lot of changes in the fashion industry, where the product material is sourced from one country, manufacturing is from another country, and country of design, but to you what does country of origin mean?

PARTICIPANT: It absolutely means nothing to me, personally. But I'll answer this in a few ways.... So there is a legal definition of country of origin, and I have to say I am not really sure how that works. But if you are a brand and want to put made in the European Union then you have to make sure that you meet all the rules, but that is with the legal definition. Today, so that is one thing. Then there is a question does 'made in' have any marketing value? Does it have a brand equity value? Now there are some products, some position where 'Made in Italy' is a big thing. So that is perceived to adding a value to the brand. So people will continue to produce in Italy, enough to meet the legal requirement to say its 'Made in Italy'. So there are some brands that want it to be 'Made in Britain', Barbour or some companies will believe, and probably correctly having adds value to the brand. You don't want to buy a Barbour jacket for what it costs, saying 'Made in Timbuktu'. However, I have to say these examples are probably of a very small percentage of the total. But the vast majority of apparel (clothing and footwear) has it made in Vietnam, China; have it made in Bangladesh, or whatever. So if you go to the stores of River Island or something, they will probably say made in Bangladesh or something, nobody cares, fair enough.

PARTICIPANT: Have a look in your jacket and see where it is made?

INTERVIEWER: It says Vietnams.

PARTICIPANT: ok, so first all you didn't know, second of all you probably don't care. So to be honest, I don't think it makes much different, except if you have a brand that is part of its brand personality or brands DNA that is linked to its specific country, and then you may want to keep that, but 99.5% is. You are a consumer you didn't know either, so you just liked the thing.

INTERVIEWER: So for me, it was about the style.....

PARTICIPANT: Exactly, so you didn't go, oh I will not buy this because it is made in Vietnam. And so, who would? So, I don't think it makes any difference at all, as long as, like I said there is a legal aspect and people have to make that, but in terms of the consumer, marketing and branding, apart from these few brands that are linked to specific countries, I don't think it makes a difference.

INTERVIEWER: Could you name a few.....?

PARTICIPANT: well, I would say, Barbour, that would be one, and that is because it has got a British heritage, British countryside kind of look to it, and that is part of its brand. So its brands position. Here I am talking a consumer by the way, not as (Company L). You will see some shoe brands, where 'Made in Italy' is quite important. You will have some suits, Cavani suits- pretty top end stuff, or Zenu suit, where 'Made in Italy', if that said made in Vietnam, on Zino suit, you know the person wouldn't really want to buy it. So who makes most expensive brands.... let's say 'Prada'. 99% Prada products are made in Italy, because you think Prada and you think made in Italy. Prada has made in Cambodia or whatever that people would think, oh that is not what I was expecting. And to be honest, I don't think that is going to change particularly. I think you are the perfect example, if you do a survey with your friends, I don't think people would know, where it is made. But in generally, would you say Country of Origin is associated to Made in.

INTERVIEWER: Do you mean 'legally'?

PARTICIPANT: I don't know the legality, you will probably need a lawyer to provide you with legality aspect but you have to add a certain amount of value in a particular place to get the origin.

INTERVIEWER: So companies use 'Italian Fabric' on their product labels, you as a supplier, do you have that promoted as well?

PARTICIPANT: To be honest, No I don't actually unless its Prada or something and they said its made in Italy, its got Italian fabric and you are willing to pay a fortune for it, because most of the fabric today, I would think 90% comes from Asia, China, Korea, Thailand. And I do see a lot of people rushing to local mills in Italy to say I have got Italian fabric, maybe around the edges, with some really premium or sub-brands, but that would be an issue, but otherwise I don't see no point.

INTERVIEWER: So if you see a British fabric, would that be associated to the yarn or to the manufacturing of the fabric?

PARTICIPANT: Right, so if someone was saying this is made with British fabric, I would assume that it means that the fabric was woven in the UK. Now if it's a woolen thing, I don't know if it's a British Sheep, I have no idea. If it's synthetic, I would imagine they have bought the yarn to weave, I would imagine so. But if they are saying British fabric I would imagine its woven here. I guess so, I don't know. But I don't think they go and open a big mill to supply that polyester yarn and acrylics, I don't think it exists in the UK. But you know some people would say that you know its British wool from British sheep, but again that is pretty niche stuff, there is not a lot of sheep in here.

INTERVIEWER: As an industry expert which element of country of origin is most important?

PARTICIPANT: Again, there are many models that you can think of actually. Some brands say we are marketing and designing; we will do our design that is our value adds, and we will do our marketing on the side, and that's how they see themselves. Other companies would be like we are just a sourcing and marketing company, actually get somebody else to design it, so the manufacturers can do the design, or they outsource it, but other people don't even do that, they just go show me what you got, ok ill buy that for 5000 or 500,000 etc. So it's very mixed, and would be very much dependent, which brand you are, and what you see as your core competence. So Primark is a massive retail, Huge. Now I don't know, as I have not worked for Primark, I don't know what they see as their core competence, I would imagine it's in being really good in retailing and sourcing, huge volumes. I don't know if they have their own designers, I don't know. If you look at Marks and Spencer, they may say that well actually we use to outsource most of our designs, so we would like to bring most of our designs in-house because we get more control, and get to be more creative. So it's pretty mixed pack. I couldn't really say to you that the answer is X, the answer is 42, as everybody has got their own kind of thing.

INTERVIEWER: And would you say this is the same with fashion brands you work with? So are you working with fast fashion, or are they more seasonal...

PARTICIPANT: Oh everybody, from H&M through to Levis, to Adidas, everybody. But they have all got their own, so H&M has 500 designers in Sweden, but they are all outsourced designers, but they do a lot of designs for H&M. Inditex-Zara and Massimo Dutti, they have a slightly different model, others well as I say, they may be more into retailing. So I can't really answer your question as it really depends on what segment of market they are in, where they see their value add, and therefore, where they want to put their major investments.

INTERVIEWER: But for '(Company L)' is country of origin important at all?

PARTICIPANT: It is important where the customer needs it. So if we are supplying into Mexico, so Mexico is part of what is called North American free trade agreement, so NAFTA. So if you want to have a duty free import back into the US, you have to have Mexican Country of Origin. So that is a legal, and so that is what you have to do. If you want to supply to Honduras, Guatemala, Nicaragua, these places, they are part of CAFTA. So you got to have, it has to be, otherwise, you won't be able to export back to the US. So in those cases that are important, generally, though, it's not important. So it is much more important to that is what your service is like, and how quickly can you do it. So nobody on earth would wait, if we went around and said Hey we are opening a factory in UK, so we can have 'Made in UK', we will ship it to you in Cambodia, and they will think you are mad. It will be too expensive; it will be too slow, so it doesn't matter. What they want is thread their tomorrow morning in Cambodia. Apart from these things like CAFTA and NAFTA, it doesn't matter. Now Prada by the way now insists that its European Union product and this is because they want to be able to say that this is made in Europe. 34.03 So, I think where its legal side like NAFTA and CAFTA, otherwise country of origin is, to me at least is only important if its aligned with brands values, and if you and me as consumers are willing to pay. Would you pay £10 more for you jacket to be made in UK? Probably not! So people wouldn't would they, unless you have a particular brand position, but there aren't many of those brands I would think. So for these very high premium brands that position, I mean they are very expensive aren't they. So what is it that may you wants to buy a Gucci bag, instead of ? So they got to do something to build a brands value, they got to build a brands perception, and having made in Italy gives that extra....

INTERVIEWER: And why is being made in Italy such a big thing.....

PARTICIPANT: Because consumer's perception would be that this gives me quality, and chic. So it's like cars made in Germany

INTERVIEWER: Don't you think country of origin has any association, don't you think so?

PARTICIPANT: You are a bit younger than, quite a bit, so maybe you guys don't see. Maybe it's a generational thing. German Cars, Italian clothing, Brazilian fashion house, these things were seen quite important, and New York, like the Milan Catwalk. Maybe for you guys, it does not matter, its good, its good. So like Ikea images it self as Swedish, Swedish flag, Swedish cakes, Swedish thing and that, now why do you think they do that. Is it because they are Swedish? I don't think so, but it's because, they do It on purpose, because in people mind, people trust Sweden, must be quality, must be good, so subconsciously. I mean do they do it for a reason obviously; they have not just made it up one morning. So that's the brand that will sell its country of origin.

INTERVIEWER: But in general, how important do you think is a relationship between a brand and its country of origin?

PARTICIPANT: Mmmmm, it's important if the consumers think it's important. For example, what's the country of origin of Adidas? So does it matter to you where it is from? (NO), now it matters to them, so you see a German football team as Adidas, so it matters to them, No, you didn't even know. I bet you know where Coach or Michael Kors are from, but these are quite high-end things. So I think this matter on very high-end things. so if you as a consumer don't know, what is the point of Adidas putting German flag and etc. which as high-end, in this case, that is important for you. So I think it is important for only high-end like Burberry, Barbour, Paul smith, so some of these brands are very high end, and will try using country of origin as a selling point, but that is really up here.

INTERVIEWER: And do you still think there is an existence of manufacturing and retailing brand, or are those terms no longer valid?

PARTICIPANT: So if you go in a shop and ask them if they think they are a manufacturing brand, they would think you are mad. What do they care, to them it makes absolutely no difference at all. Do you care whether Adidas has its own factories; do you care whether coach has its own factories? Apple doesn't mean its own products, do you care? Of course you don't care, so no consumers do not care.

INTERVIEWER: So a lot of countries are outsourcing manufacturing and even yarns.

PARTICIPANT: Oh of course, no one is going to make his or her own yarns.

INTERVIEWER: But of course a lot of companies have been outsourcing in China, but labour in China is increasing as well.

PARTICIPANT: Well that has already happened, everybody went off to China, but over the last 10 years, people have been looking at China, so before they use to do China plus one, now they do China one plus, plus one, for example so, here is manufacturing in west, but oh, let's put the manufacturing in China, plus Vietnam, or let's put it in China, Vietnam and Indonesia, plus Cambodia, plus Bangladesh, plus several other countries, but why don't we have one in this particular location because it is close to us, so basically, China was probably about 60%, 70% of the world's apparel footwear, and probably about 45% now, and will go down to 35%, but it will still be very important.

INTERVIEWER: And where do you see them moving.....?

PARTICIPANT: Well, the second-largest apparel exporter is Bangladesh.. and the third one is Vietnam. So it's all the big guys, Bangladesh, Vietnam, India, Turkey for Europe, South Africa, Colombia, Mexico for states, southern American, but probably not that much.

INTERVIEWER: And do you manufacturing returning back to UK?

PARTICIPANT: Well I was asked this question in the conference, and I would that say that maybe 1% of it, people who want country of origin, people who want very fast service, people who want something different, so every time perhaps, I think you will see- I do see some coming back but I don't see a mass volumes, because there aren't any factories here for a start, but I think some will start come back, but I don't think it will be the UK's biggest industry.

INTERVIEWER: And would you say this would be more applicable to retailers or manufacturers?

PARTICIPANT: Yes, I think the high street guys would say 'yayyy', that is really good, but the prices are really high.

INTERVIEWER: So a label says 'Made in Britain' for example if select or River island says 'Made in Britain', what share of COO would have gone in?

PARTICIPANT: Well that would have been sewing and packaging. If they just stick it in a box and stick made in, I don't think that can do that, cutting and stitching in UK. I think some companies will start to do that, but I would be very surprised if this is their shop, and if the start doing it on more than four dresses in the corner. Maybe they are drive to develop a brand on a higher price, I don't know.

Company M: Technical Manager Aka Senior Garment Technologist

Role: Technical Manager – been in the company 11 years and look after day to day technical aspects of the business, such as fits, fabrics, quality control and product production. About the Company: we supply to retailers in the UK like M&S, NEXT, Fat Face, George, TU and Tesco.

INTERVIEWER: And is it only for retail brands or for wholesale brands as well?

PARTICIPANT: No, we work with only retailers. So we have factories in Pakistan, we manufacture there and then bring it to the UK, and then we supply them over to these retailers.

INTERVIEWER: And would you label (Company M) as a brand?

PARTICIPANT: No, we are just suppliers, so we sell to those brands. We don't sell anything as labelled as [...], and we don't have any intention to do it in the near future.

INTERVIEWER: Could you please tell me what does the UK head office involve?

PARTICIPANT: So yes, we have offices here in the UK. We work as part of the head office - so we have a team of merchandisers, garment techs, and logistics... and, we have also got a warehouse in here, which is for all these customers. So the business is done from here, and then we will go there, do the design presentation, get the samples made from the factories and then we see them after their initial reviews, and then there is selection meetings, and then we do styling confirmation as well. All the delivery dates, the stock is made in Pakistan and then goes to our warehouse in the UK. Then it gets checked in the UK, re-packed and then delivered.

INTERVIEWER: So you said you have a warehouse here? Is the packaging done here?

PARTICIPANT: Yes. Pressing and packaging.

INTERVIEWER: So like you said that a lot of these brands are manufacturing in other countries, and then there is a lot of debate going on about bringing it back to the UK, what do you have to say about that?

PARTICIPANT: The main drive is price, the closer you manufacture it- so there are two aspects of it, one is lead-time and the other is price. If you get a better lead time, closer to home, with the better price, retailers tend to book those styles closer to home, let's say Turkey, closer to Europe and their lead time is quite good. And the travel time isn't as long as it is from China or Pakistan. But if, they don't have that price cushion to make a comprise on, then they can comprise on the lead time, they can bare the longer lead time, but then they have to meet the certain price bracket and that's when they go the Far East and Asia.

INTERVIEWER: And what are the key issues that are pushing these brands to outsource?

PARTICIPANT: It's the price. If you compare the price of clothing, the same kind of clothing that was sold 10 years ago, let's say for was £15 pounds, is now sold for £12. So the price of everything is going up, whereas, the price of clothing is going down. So that's all down to the competition within retailers. But they try to sell clothing as cheap as possible, by resourcing from countries like Pakistan, China, Bangladesh, and India. So they are selling for a cheaper price, but also sourcing for a cheaper price. So it's the price competition in the market that drives companies to go overseas countries.

INTERVIEWER: And when you talk about the price of the production, is it the manufacturing of the product or the components?

PARTICIPANT: It's the material and the labour put together. The material cost in countries like China, India, and Pakistan is cheaper as compare to the UK.

INTERVIEWER: And why would you say that?

PARTICIPANT: Because that is where everything gets made, you don't grow Cotton in the UK. It's going to come from there, we don't make any synthetic fabric in the UK, there is No..... If you did knitting or weaving to make the fabrics

from raw material, again that involves labour as well. Again the production cost would go higher as well. So in other words, you will end up paying a higher price, to get the raw material in the UK and then the stitching cost, sewing cost, which will again be higher because of the labour cost in the UK. So everything put together, the cost of manufacturing, cost of material is a lot cheaper in the Far East.

INTERVIEWER: So would you say a lot of brands, like NEXT, Fat face, and other brands you deal with, so they are manufacturing in Pakistan, is their material coming from Pakistan as well, or is that coming from somewhere else?

PARTICIPANT: The material depends on what material are you using. If its cotton its Pakistan, if its polyester, its China. So when they are getting priced up for a product, they do the cross costing. They will get the costing done from Pakistan, costing done from China, from India and Bangladesh, from their suppliers. If the garment is made from polyester, and polyester is cheap in China, of course, the cost of the product will come cheap from China. Because of course Pakistan will have to important that polyester or raw material from China, make the product, and end up paying more than China manufacturers will be doing. So it depends on what material it is. So if you look at the sourcing policies of different countries, certain product type goes to certain countries, because of a material specialism.

INTERVIEWER: So you have previously mentioned that they don't make many fabrics in the UK, is there any reason they don't make it in the UK?

PARTICIPANT: For natural fibres it's the climate, for the synthetic fibre it's the product cost.

INTERVIEWER: So what does the country of origin mean to you?

PARTICIPANT: According to my understanding country of origin is where the product gets made, and where the material gets sourced. The actual country of origin we put on the care label is where the product gets stitched, it doesn't actually qualify for the country of origin of the material. If you made some garments in the UK, where the material was actually sourced from Bangladesh, you would still put made in UK. So we claim on the garment is where it is actually assembled together.

INTERVIEWER: and in your opinion which element is more important 'the material' or 'where it is stitched'?

PARTICIPANT: Both I would say. If you look at the cost of the product, then I would say 60% of the cost is material, and the 40% of the cost is then the manufacturing cost in clothing. That is kind of the industrial rule of term.

INTERVIEWER: And you said that they don't add country of materials on the product?

PARTICIPANT: This is something to do with the legalisation that you have to put the country of origin on the products. Country of origin is where something is made, or where everything is assembled together, or where the components are put together to make that product look like as it does. Doesn't matter where the buttons came from, zips came from, fabrics came from. The country of manufacturing or country of origin we put on our care label is associated to where put everything together.

INTERVIEWER: Do you think country of origin has any impact on the brands and its services?

PARTICIPANT: On the consumer, to some percentage of consumers it matters, but the majority doesn't care where it is made. They are looking at the product and price. There are some consumers, a very small percentage that would love a garment made in the country they are living in. so it does impact the small group but not majority, people look at the product and then look at the price.

INTERVIEWER: So you have previously said that some brands that may bring it back depending on, if they are offering fast fashion concerned with lead-time, or based on the price offering of manufacturing within the UK, but do you actually see brands doing that any time soon, or.....?

PARTICIPANT: I wouldn't say. There are manufacturers within the UK, currently they are running factories. The reason they are currently able to run these factories are because of higher cost and short lead-time. They offer quick turnaround,

high fashion, which happens in the UK or within Europe. Whereas, a product with longer lead-time, slow fashion, that happens in the Far East, so where you need product in 4 weeks' time or 6 weeks' time, that is where the Leicester production comes in, or turkey comes in, and I would case east Europe comes in as well.

INTERVIEWER: So do you think brands are going to bring it back if.....

PARTICIPANT: If they can afford it.

INTERVIEWER: So with the recession recovering, do you see a lot of brands bringing manufacturing back to the UK, or do you see limited?

PARTICIPANT: It's not happening a lot, and it cannot happen to a higher scale. Again because of the production cost, even with being out of recession, the production cost is still very high in with compare to UK. So, to product the garment, it's still very expensive in compare to Far East.

INTERVIEWER: So there is also two other elements, such as country of design and country of brand origin.. Do you think country of origin matters to a brand?

PARTICIPANT: Country of Design - for majority of brands, the brand origin is where brand is designed as well, because UK based companies- they have got their design house in the UK, they design their products here, send the design specs out, if it's a French company then they would have their design house in the France. So it's important to keep their brand identity, so it's important to keep their designer in-house, because they understand their market, their customer, so they can design as for their customer needs.

INTERVIEWER: So you do think country of design is important?

PARTICIPANT: Yes.

INTERVIEWER: And how about the brand image, an English brand, British heritage, material sourced from once country, designed in another, do you think it has an impact?

PARTICIPANT: No, I don't think there is any impact. If like M&S is a typical heritage brand, as long as designers are keeping that look in their design, and selecting their material, it does not matter where there are assembling their garments.

INTERVIEWER: And do you do any designing here, how does that work with fashion brands?

PARTICIPANT: Well we work with our customers, and each customer has it's down design house. Our design team works as a support for their design, so like lets say M&S is designing a range, they will have two designed working in the head office, and then we will offer them of one of our designers to assist them as a helping hand.

INTERVIEWER: And, so obviously you have helping hand designers here, and then manufacturing is done in Pakistan, having so many different country of origin dimensions, which construct would you say is most effective in your opinion?

PARTICIPANT: I think the selection of material, and the design is the basic thing for products to sell better. So, if you have a material that performs better, then that would impact a brand image, and the actual design of the product is done with that as well. That's what design team does, and then it goes to the buyers whose job is to source the design and material at a cheaper price, so when they do a cross comparison with suppliers from a different country, and based on that they make a decision on where they can but it for a cheaper price. Then they see what profit margin they can make and what can they sell it on. The most important thing I would say is where the actual design and the selection of the material come from. And then they would go out and source it from different countries.

INTERVIEWER: I see you mentioned about the how country of design is important because they can do research and then design according to their market, but what other key benefits are associated with design in-house or near to the location?

PARTICIPANT: Design is something that defines your brand image, so getting the product designed in the same country is essential to maintain that brand image. It's hard to get the product designed from another country, for example, you are the UK based company, and have a brand image of English Heritage, and you are placing your design office in India, basically having Indian designers working on it, but they probably don't even have a clue what it's all about. They will probably end up designing some nice stuff, but it may not reflect the brand identity. So you need to have designed that understand your company insight out, they understand the culture, consumer market. So these are the reasons I think it's important for a designer to be based in the same country the Company.

INTERVIEWER: And what are your views on the performance, what dimension is that associated with?

PARTICIPANT: In terms of the performance, all companies would have a quality assurance department, regardless of wherever they buy it from. This is to ensure that the product that comes in, whether it performs up to their standards, So, I don't think that makes a lot of impact on the country. Because each Company has got their own technical specification and technical requirement to make sure is tested before it's shipped to the brands warehouse.

INTERVIEWER: And would you say your manufacturing company is English or would you say it is Pakistani?

PARTICIPANT: We are an English based manufacturing company, that use to have the manufacturing operation in the UK, in these premises, and we were specifically working with English retailers in the UK, but we had to move our production to Pakistan, because the production cost was getting higher here, but we are an English company, registered in the UK, but we are not a retailers but a supplier and have always been a supplier.

INTERVIEWER: And do you see your company bringing manufacturing back into the UK?

PARTICIPANT: No. we don't.

INTERVIEWER: And what are your views on different dimensions of country of origin?

PARTICIPANT: But I would say the country of origin should be where the design is originated from, that is what your customer associated with, that is whom your market is. Country parts or material and country of manufacturing are all done based on the cost, and people are buying them as cheap as possible, from different countries. This also depends on their lead-times, where they to scarify too much, and compromise. If they need shorter lead-time than they need to compromise on the price and bring it closer to home. That is where Turkey and Eastern Europe comes in. So we work on about 12 weeks lead-time because four weeks for product to come over from Pakistan Sea to the UK. So if it is through the sea then it takes about 14 to 12 weeks if its air then its 10 to 12 weeks.

INTERVIEWER: And do you work with companies that work on seasonal trends or fast fashion?

PARTICIPANT: In terms of production, in factories, we are making what will go in the retail in the NEXT three month time, our design team are working on what will be sold in the NEXT 6 to 9 months' time, so different departments are working on the different time scale.

INTERVIEWER: And how important do you think is a relationship between its brand and country of origin?

PARTICIPANT: As I said before, for brand – they will look at the ultimate purpose of making money. And the country of origin, only a small percentage of people will look at it and consider it importance, just to see what the get for the value of money. Is it value for money or is it not. But for the majority of consumers, it is not important, and they will not look at where the product is made or manufactured. Consumers mainly see the product and price, and the purchase accordingly.

In terms of how important is the relationship, retailers have their sourcing policies, and they cannot source everything from one country. There is a greater risk, for example, if NEXT starts buying everything from

Pakistan, and then if something goes wrong with Pakistan (politically or etc.), then this would have an impact on shipping products back to the NEXT. Therefore, retailers have to do a risk analysis and then based on their sourcing policies they would then making a decision on where they will buy it from, i.e. buy some product from here, some from there and etc. Therefore, the product can be purchased from all around the world, keep risk analysis in mind.

In terms of relationship, it is always a two-way thin. They need to have that piece of mind where we need to maintain the relationship, so provide them support, and this is why we have this office, where we are helping them with Garment tech, designers, to provide them the support they need.

INTERVIEWER: And what are the key issues that are pushing these brands to outsource?

PARTICIPANT: It's the price. If you compare the price of clothing to the same kind of clothing that was sold 10 years ago, let's say for was £15 pounds, is now sold for £12. So the price of everything is going up, whereas, the price of clothing is going down. So that's all down to the competition market with retailers. But they try to sell clothing as cheap as possible, by resourcing from countries like Pakistan, China, Bangladesh, and India. So they are selling for a cheaper price, but also sourcing for a cheaper price. So it's the price competition in the market that drives companies to go overseas countries.

INTERVIEWER: And when you talk about the price of the production, is it the manufacturing of the product or the components?

PARTICIPANT: It's the material and the labour put together. The material cost in countries like China, India, Pakistan is cheaper in compare to UK.

INTERVIEWER: And why would you say that?

PARTICIPANT: Because that is where everything gets made, you don't grow Cotton in the UK. It's going to come from there, we don't make any synthetic fabric in UK, there is No..... If you did knitting or weaving to make the fabrics from raw material, again that involves labour as well; again the production cost would go higher as well. So in another words, you will end up paying higher price, to get the raw material in the UK and then the stitching cost, sewing cost, which will again be higher because of the labour cost in the UK. So everything put together, the cost of manufacturing, cost of material is a lot cheaper in Far East.

INTERVIEWER: So would you say a lot of brands, like Next, Fat face, and other brands you deal with, so they are manufacturing in Pakistan, is their material coming from Pakistan as well, or is that coming from somewhere else?

PARTICIPANT: The material depends on what material are you using. If its cotton its Pakistan, if it's polyester, it's China. So when they are getting priced up for a product, they do the cross costing. They will get the costing done from Pakistan, costing done from China, from India and Bangladesh, from their suppliers. If the garment is made from polyester, and polyester is cheap in China, of course, the cost of product will come cheap from China. Because of course Pakistan will have to important that polyester or raw material from China, make the product, and end up paying more than China manufacturers will be doing. So it depends on what material it is. So If you look at the sourcing policies of different countries, certain product type goes to certain countries, because of material specialism.

INTERVIEWER: So you have previously mentioned that they don't make many fabrics in the UK, is there any reason they don't make it in the UK?

PARTICIPANT: For natural fibres it's the climate, for the synthetic fibre it's the product cost.

INTERVIEWER: So what does the country of origin mean to you?

PARTICIPANT: According to my understanding country of origin is where the product gets made, and where the material gets sourced. The actual country of origin we put on the care label is where the product gets stitched, it doesn't actually qualify for the country of origin of the material. If you made some garment in the UK, where the material was actually sourced from Bangladesh, you would still put made in the UK. So we claim on the garment is where it is actually assembled together.

INTERVIEWER: and which element of country of origin do you think is more important in your opinion?

PARTICIPANT: Both I would say. If you look at the cost of the product, then I would say 60% of the cost is material, and the 40% of the cost is then the manufacturing cost in clothing. That is kind of the industrial rule of term.

INTERVIEWER: And you said that they don't add country of materials on the product?

PARTICIPANT: This is something to do with the legalization that you have to put the country of origin of the product. Country of origin is as where something is made, or where everything is assembled together, or where the components are put together to make that product look like as it does. Doesn't matter where the buttons came from, zips came from, fabrics came from. The country of manufacturing or country of origin we put on our care label is associated to where put everything together.

INTERVIEWER: Do you think country of origin has any impact on the brands and its services?

PARTICIPANT: On the consumer, to some percentage of consumers it matters, but the majority doesn't care where it is made. They are looking at the product and price. There are some consumers, a very small percentage that would love a garment made in the country they are living in. so it does impact the small group but not majority, people look at the product and then look at the price.

INTERVIEWER: So you have previously said that some brands may bring it back depending on if they are offering fast lead-time or based on the price offering of manufacturing within the UK, but do you actually see brands doing that any time soon, or.....?

PARTICIPANT: I wouldn't say.. There are manufacturers within the UK, currently they are running factories. The reason they are currently able to run these factories are because of higher cost and short lead-time. They offer quick turnaround, high fashion, which happens in the UK or within Europe. Whereas, product with longer lead-time, slow fashion, that happens in Far East, so where you need product in 4 weeks' time or 6 weeks' time, that is where the Leicester production comes in, or turkey comes in, and I would case east Europe comes in as well.

INTERVIEWER: So do you think brands are going to bring it back if.....

PARTICIPANT: If they can afford it.

INTERVIEWER: So with the recession recovering, do you see a lot of brands bringing manufacturing back to the UK, or do you see limited?

PARTICIPANT: It's not happening a lot, and it cannot happen to higher scale, again because of the production cost, even with being out of recession, the production cost is still very high in with compare to UK. So, to product the garment, it's still very expensive in compare to Far East.

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INTERVIEWER: And, so obviously you have helping hand designers here, and then manufacturing is done in Pakistan, having so many different country of origin dimensions, which construct would you say is most effective in your opinion?

PARTICIPANT: I think the selection of material, and the design is the basic thing for products to sell better. So if you have a good material that performs better, affects the brand image, and then the actual design of the product is done with that. That's what design team does, and then it goes to the buyers whose job is to source the design and material in cheaper price, so what they do is cross comparison with different countries, and then see where they can get it for a cheaper price, and then they see what profit margin can they make, and sell it on. The most important element I would say is the design and the selection of the material from different countries.

Company N: Senior Fabric Technologist

INTERVIEWER: What is your role?

PARTICIPANT: I am a fabric Technologist.

INTERVIEWER: Okay, and could you tell me what that involves?

PARTICIPANT: I am in charge of the performance of the fabrics, so making sure that they are fit for the purpose. So, for instance if you have a fabric that has maybe got a loose construction, where you might have a seam slippage or a pilling problem, it's up to me to identify how big that problem is, and see, that if once that fabric goes into a garment, it still becomes a problem in wear. So if it does, then we have to amend the construction of the garment or amend of the construction of the fabric.

INTERVIEWER: And, how long have you been in this company?

PARTICIPANT: Nearly two years

INTERVIEWER: Could you please tell me a little bit about your company please?

PARTICIPANT: We supply high quality ladies wear, to some of the main brands such as [...], the Austin Reid Group, Viyalla and Hobbs. So we do two things, we do some designing ourselves, but then we also take our customer's design and then manufacture the garment for them.

INTERVIEWER: When you talk about manufacturing, is that done in house or offshore?

PARTICIPANT: No, Offshore. Mainly in Romania, Sri-Lanka, and Macedonia.

INTERVIEWER: And when you talk about designing, can you please explain that a bit more in detail?

PARTICIPANT: Ok, so we have an in-house design team, and we also have a lady who does fabric sourcing. Between them, they come up with concept garments that we can sell to our customers. So we actually make the garments to sell to the customer, so actually make the prototype (sample) garment, which basically involves choosing a fabric and making a proto.

INTERVIEWER: Did the company start as a manufacturing company or?

PARTICIPANT: It's a family owned business, and it's within it's the fourth generation now. So they were originally in the manufacturing side within the UK.

INTERVIEWER: And what did they manufacture?

PARTICIPANT: Out-wear. Mainly coats.

INTERVIEWER: So, as you have mentioned earlier that the company is offshoring the garment manufacturing, what is the key reason behind this?

PARTICIPANT: It's the cost. It's labour cost and premises cost. It's like everything else, so if you have a factory set up in the UK, it's much more expensive than having a factory set up in Romania or Sri-Lanka. And then you have your overheads for that as well, haven't you. Whereas, when you use third party manufacturing, then if you haven't got any work for the factory then it doesn't matter, does it. And then, you can also choose between different factory units, so you can be a bit more flexible. So like, when the company started they only made coats and jacket. Whereas now, we make blouses and dresses as well.

INTERVIEWER: So you are probably dealing with a lot of manufacturers then aren't you?

PARTICIPANT: Yes, probably say about 10 manufacturing units.

INTERVIEWER: When you are designing, for example for a brand, do you deal with manufacturers based on their expertise.....?

PARTICIPANT: No, there are certain brands that only like use to the manufacturer in certain countries, but that is mainly to do with the fact that the factory has been audited, rather than that they don't prefer the other factories.

INTERVIEWER: Would you say it's more to do with the security?

PARTICIPANT: All of our factories are audited, but some customers prefer to have a limited supply base that is audited. So if you try to go on board with a new factory, then our customers are not always keen to do that, unless they believe that it will be a massive cost saving or a quality enhancement for them.

INTERVIEWER: And what kind of things would you save involve in cost saving?

PARTICIPANT: Well, I would say - probably labour.

INTERVIEWER: So, when you talk about the quality, is it to do with the fabric, or is it to do with the design?

PARTICIPANT: They are both equally important. Because you can't make a quality garment if you don't have a quality fabric.

INTERVIEWER: So, according to your understanding, what does country of origin mean?

PARTICIPANT: The country of origin that we use in our care-label is where the product is made. Not where the fabric comes from, or where the trim comes from, but it's where it is actually made.

INTERVIEWER: so, why do you associate country of origin with made in?

PARTICIPANT: well, it's not a legal requirement to put the country of origin; it's just a preference. When you look at some garments on high street, they don't have a country of origin on them.

INTERVIEWER: So, since it's not legal, why do you prefer to display them?

PARTICIPANT: Because it is a requirement of our customer....

INTERVIEWER: So, why would you say the customer requires?

PARTICIPANT: It's there legalization.

INTERVIEWER: You wouldn't say it's because based on their perception, or based on where it's made

PARTICIPANT: No. Because they are in control of their manufacturing sites, because they have the factories audited. But then possibly, it's to tell their customers. I don't know..

INTERVIEWER: According to your perception, which COO component is more important in general?

PARTICIPANT: The country of origin is where the product is actually made, how important country of origin for the other parts are.... That purely depends on the customer. So for all our customers, they know where the components come from, for the entire product we make. We don't keep that a secret, and they know the country of origin for all the components because we have to specify that. But, they don't necessarily tell their customer that about material or design.

INTERVIEWER: So, you have mentioned L.K. Bennet.. Would you say they are more like design based brands?

PARTICIPANT: Yes. So I don't know, certain brands might care to keep maybe a different perception of where the garment comes from, especially because of the press. And there has been a lot in press about certain areas in the world. So, some brands do show concerns and preferences with their garments manufactured somewhere, that doesn't have the same bad press as other part of the world, which then benefits to them.

INTERVIEWER: So, in general terms, how important or not do you think is a relationship between a brand and its country of origin?

PARTICIPANT: I think, the higher up the brand is on the food chain, the most important country of origin is. Because if someone like Primark gets a bit slating, it isn't going to stop anyone going from Primark. But, if brands like L.K. Bennett

that have a much higher profile customer, such as Princess Kate, gets a slating about where they are making their garment, then that is much more serious for their reputation.

INTERVIEWER: How important do you is the origin of the brand...

PARTICIPANT: I think it depends on the customer. I mean people do go out looking for made in Britain these days. So, as a country, although we are a small country company, we have a very good reputation for providing quality garments. So to go to an English brand, if you are paying a lot of money, you would expect a good quality brand.

INTERVIEWER: So, like the brands that you are working a long with, would you say they are offshoring, or do they follow the concept of made in...

PARTICIPANT: We don't make anything in Britain. The likes of, for instance, Jack Wills – they make in the UK, so they brand themselves as a British company, made in the UK, and they do source fabric from, and manufacture in the UK. But, they do buy a lot of stuff offshore as well. The same goes for Burberry. They still manufacture for their fabrics, the garment and all their components for their key Mac is still done in the UK, and that is, what the customer is looking for, so it's a brand perception.

INTERVIEWER: And would you consider bringing manufacturing back to the UK?

PARTICIPANT: Yes, defiantly. If we thought we could cost something here, because it's much easier when your customers are in the UK. It cuts out on carriage and etc. But there are not a lot of good manufacturing companies left in the UK. If you were going to do that, you would have to set something up.

INTERVIEWER: What kind of things would you say is majorly lacking...

PARTICIPANT: You couldn't go and find a factory that could manufacturer, a 2000 fully tailored quality garment, which we require. It just doesn't exist anymore.

INTERVIEWER: What do you think is the key thing missing? Technology.....?

PARTICIPANT: I think everything is missing now. I think the technology you can get hold off, but the skills are missing. I think it would be difficult to train people up. But the skilled workforce that UK had to manufacture the garments are now in their 50's and 60's.. Not young people.

INTERVIEWER: And could you not perhaps see the young people trained...

PARTICIPANT: Yes, defiantly. But you couldn't do it now. You couldn't suddenly say that I am going to make this order in the UK, instead of Romania, because there isn't anywhere to do it. It would have to be some sort of strategy that would need to be put in place.

INTERVIEWER: As for the material, I assume you source that from another country, what is that based on?

PARTICIPANT: I think that is based on trend, on price, based on the type of fabric you are looking for, the place where you will manufacture your garment. So if you are going to manufacturer your garment in Sri-Lanka, you really want your garment, you really want your fabric from the Far East, you don't want to take your fabric from Europe and then taking it into Sri-Lanka, and then bringing your garments back again. You want a Far East fabric going into Sri-Lanka and then bringing it back. So the logistic plays a part in this as well. I mean, we do take Far East fabric and take them to Romania, and then we import the garment, but that is a little bit easier logistically, then sending European fabric out and then sending it back.

INTERVIEWER: and your decision on the country to source the fabric from is based on the.....

PARTICIPANT: it's more about the product you are after, and also the lead-time. So you can buy the same product from the Far East and from Europe, the prices at the moment are fairly similar because the Dollar rate and Euro rate fluctuates. But in order to get your Far East fabric, into a manufacturing unit and then the garment, though, it's a longer lead-time. Then getting a European fabric in Romania, and then getting it through. So you have a similar product and have two routes for it.

INTERVIEWER: In terms of brand, you got country of design and country of parts, which one would you say is more reflecting the brand image?

PARTICIPANT: Well, the brand image is based on the collection. It's based on the garment style and the fabric chosen for the garment, you don't... the designer will look at both things, such as the colour, textile, trend, and then she will put that collection together. She will have a vision, and then someone will need to find or make something specific if there is nothing there. So depending on what she wants, but also the actual selling price of the garment, and also how much you are looking to buy. So for example, if you only buying 200Meter of fabric then there is no point buying it from the Far East, because you will not be able to get it manufactured in the Europe. So, you would have to go through European supplies to do that. But if you want to make 8000 of them, then you have an opportunity of an economy of scale. And actually have better value product. But from a minority point of view, fabric is the most important thing, because it's the biggest cost of the garment.

INTERVIEWER: And how and why is the costing so much in garment...?

PARTICIPANT: If you break down the cost of the garment into, the button, the lining, the cost of outer fabric and the cost of manufacturing, the cost of fabric is the largest spent unless you are making a massive big shirt, in a good value of money. And it's a very complex garment, but you are using a basic fabric then your manufacturing may be more. But when you are manufacturing a tailored garment, it's the material. So just because you fabric is made in Italy, but your wool could come from Australia, so all the component parts are pulled together, and then that fabric is made in Italy. Or your fabric might be woven in China, and might be brought in Spain for dyeing and finishing. So, the roots of your fabric vary depending on what they are. The cost is on the raw material, so they are the fibres – especially when they are wool, you cost is – I don't know what percentage. Because if you are using Nobel raw materials like cashmere, wool or al-haga – they are really expensive fibres, so your money is in your fibres. And then you are manufacturing your fabric. So it's a similar sort of thing, where you have money in your fabric and then you are manufacturing your garment.

INTERVIEWER: Do you carry out brand perception?

PARTICIPANT: Our company has won a drapers award for one of the best manufacturers. We are very proud of our heritage, our quality, and the brands that we supply too, have highly quality product, and their customers perceive it to be high quality, and we have to make sure that we can deliver that. So we are very that we can do that, and feel much honoured.

INTERVIEWER: So the companies you are supplying too, would you say they are a retailer or would you say...?

PARTICIPANT: So the likes of John Lewis are retailers, but it depends on the description of retailers. They are all retailers aren't they, but some of them are bespoke design house rather than actually mass-market production. I still think our brands are retailers; they are the likes of Burberry. The essence of brands such as L.K. Bennett is like concessions and retail stores.

INTERVIEWER: And what are the benefits of concession retailing?

PARTICIPANT: Just because it's a one-stop shop for people, who don't have time, so it's not necessarily for someone who wants to troll on the high street. I want to find something that suits me, but I want to have a little look at the other brands, so it's good in that sense.

INTERVIEWER: How important is the British Heritage to these brands?

PARTICIPANT: The fact that Princess Kate is an Icon for L.K.Bennett is the biggest representative for the brand, and so you can see how we have her picture with her wearing our manufactured dress.

Company O: Non-Executive Director

- INTERVIEWER: Can you please tell me a little bit about your company, and how old is it and ...?
- PARTICIPANT: So we are almost now one year old. By the end of March we will be one year old. So we're doing a lot of stuff in terms of establishing the brand. So I'm a non-executive director of another company, which is called (C.O.*.*). And, the company basically produces fabric for denim fabrics... incorporating Vectran and it are basically for motorcyclists. Which are...you know, the denim is very abrasion-resistant. So that company is also trying to establish itself as a brand.
- INTERVIEWER: Okay, that's interesting.
- PARTICIPANT: And again it's very much a performance brand. So we want it to be seen as a UK brand...but it's actually manufactured in Pakistan.
- INTERVIEWER: Okay.
- PARTICIPANT: That is basically on the basis of price and the fact that we can't actually find a UK manufacturer who can actually produce that material.
- INTERVIEWER: And what would you say is the purpose...what is it that's lacking or stopping to kind of manufacture in the UK?
- PARTICIPANT: Okay, we just couldn't find anyone who could produce the sort of material that we wanted, yeah? I think it's mainly the skills.
- INTERVIEWER: It's the skills?
- PARTICIPANT: The skills. It's a skills issue. Yes.
- INTERVIEWER: Okay, that's interesting. Overall, how long have you been working with (Company O)?
- PARTICIPANT: That's four years now.
- INTERVIEWER: Four years now, okay. And...KTM?
- PARTICIPANT: Okay, KTM's nothing to do with it. KTM is one year old.
- INTERVIEWER: One year old. Overall I am presuming Technitex is the same?
- PARTICIPANT: Technitex was set up in 2000 so it's been around for fourteen, nearly fifteen years.
- INTERVIEWER: That's fine. So shall I put overall experience is fourteen years? Okay, so I think I will be asking you questions regarding company O, as this seems more relevant. So, based on motorcyclists wear is it?
- PARTICIPANT: Yes.
- INTERVIEWER: Is it for a particular brand that it goes into?
- PARTICIPANT: Yes and no. There is a brand associated with (Company O) which is called '[..]-it'. So, the (Company O) material goes into that brand. The '[..]-it' is basically what is showcased to the motorcycling world. Okay? But we also produce stuff for other brands. So Triumph. We're supplying clothing for the Triumph brand. We're also talking to Harley Davidson. So the idea is that the (Company O) material basically would be supplied into a range of different motorcycling brands.
- INTERVIEWER: So is it more to do with protection, would you say?
- PARTICIPANT: Yes, that's exactly what it is.
- INTERVIEWER: Okay.
- PARTICIPANT: So, you don't need the heavy leather. You can wear a denim type of material but it has the Vectran which if you come off the bike it will actually protect you from a break.
- INTERVIEWER: Okay and what do you understand by the term 'country of origin'?

PARTICIPANT: 'Country of origin'?

INTERVIEWER: Yes.

PARTICIPANT: Okay. Clearly in our case we are selling a denim garment and clearly it is currently manufactured in Pakistan. So the 'country of origin' is Pakistan and that's all we must do.

INTERVIEWER: Okay.

PARTICIPANT: The '[..]-It' (which is the brand for the motorcycling garments) would say 'country of origin is Pakistan'.

INTERVIEWER: Okay.

PARTICIPANT: On the (Company O) side it says the technology is British. So the technology (or the fabric development) is very much UK-based.

INTERVIEWER: Okay. Could you explain that a bit more when you say the technology being based more in the UK? What kind of things is involved in the fabric?

PARTICIPANT: All the intellectual property and all of the technical development is within the UK.

INTERVIEWER: Okay.

PARTICIPANT: And also all of the patent protection is done in the UK. So all of the intellectual property of associated with the company is seen very much as UK-based.

INTERVIEWER: Right.

PARTICIPANT: So we are developing new types of materials and they will all be sold under the (Company O) brand. It will be UK-associated but clearly manufacturing may be done offshore.

INTERVIEWER: So by, 'technical development', I presume that's more the designing side?

PARTICIPANT: Yeah, we're working with different UK universities to develop new types of... So (Company O) can be produced in yarn form in different ways.

INTERVIEWER: Okay.

PARTICIPANT: And all of that development is done... Here in the UK.

INTERVIEWER: Right. so you talked about... 'Har...' is it...

PARTICIPANT: Harley Davidson... it's a big motorcycle... it's a major American brand. It's a massive, massive American brand.

INTERVIEWER: So... and I'm presuming... would you call...

PARTICIPANT: Well Triumph is a major UK motorcycling brand.

INTERVIEWER: What is it called?

PARTICIPANT: Triumph.

INTERVIEWER: Triumph?

PARTICIPANT: Triumph, yes.

INTERVIEWER: Can you spell that for me please?
[pause to write spelling]

INTERVIEWER: So, would you say (Company O) is more like a supplier or not?

PARTICIPANT: Yeah. (Company O) basically is developing new types of speciality fabrics...

INTERVIEWER: Right.

PARTICIPANT: ...and clearly trying to sell them into the motorcycle area. So we can actually produce the fabric and then it can be designed either for the Triumph look or Harley Davidson or whatever else.

INTERVIEWER: So it's the base fabric that we're interested in.

PARTICIPANT: Yep.

INTERVIEWER: The actual design is then linked to the other brands. So, they've got their own idea of, you know, what the clothing should look like.

INTERVIEWER: Yeah.

PARTICIPANT: We're really interested in producing the fabric side.

INTERVIEWER: Okay. Now, so obviously you've already explained the country of origin in relation to (Company O). (Company O) is more English so you are emphasising the English technical aspects.

PARTICIPANT: Indeed.

INTERVIEWER: Okay, so you also have other dimensions such as, for example, the fabric and then the design. I understand that you said that the manufacturing is done in Pakistan for price point purposes. By price point purposes, was this labour or is this skill? What kind of things is included when you say price point – just to get a good idea?

PARTICIPANT: I think it is price point. There have been some quality issues. So we are currently looking to switch our manufacturer in Pakistan purely on the basis of the quality that they are producing. So, price point, skills and quality are really the things we will be looking for.

INTERVIEWER: And you've had them as issues in Pakistan.

PARTICIPANT: Quality is now an issue.

INTERVIEWER: Okay, why would you say the quality is an issue? Is there any particular reason?

PARTICIPANT: Basically it's fit. Garment fit. They can't produce the repeatability of correct fit. That's an issue for us.

INTERVIEWER: Okay. Um... What about the design...would you say? How important do you think that [unclear0:15:48:2] design is...so for example country of design...so obviously I'm presuming you're designing...design is done in the UK?

PARTICIPANT: We design for the [...] brand. The clothing is very influenced by our customers.....in terms of their design. So Triumph, Harley Davidson and others would have their own in-house designers. So they would take the fabric and then produce the design on the basis of what they want rather than what we want. So we're very much just fabric suppliers.

INTERVIEWER: Okay, you're saying that you're quite a UK-based company, are you quite like...it's not just a UK-based brand...is that you quite...

PARTICIPANT: No, we're...International. We're selling around the world.

INTERVIEWER: Selling around the world.

PARTICIPANT: So we've got a distributor (a major distributor) in Australia. And the US and Canada where we're selling into the Middle East, the Far East. So...you know, we're basically now selling around the world. But it's still a three-year old company, so it's still relatively small.

INTERVIEWER: Okay, okay. Um, now in your opinion...so I understand that certain fabrics...as a fabric supplier you've got designing obviously quite...um...it's quite [unclear – 0:17:24.6] and then you have something done [unclear – 0:17:26.9]

PARTICIPANT: Indeed.

INTERVIEWER: Any other country you are considering and talking about??

PARTICIPANT: We spoke initially in Turkey. We're now talking to Mexico. PARTICIPANT: If it's not Mexico it will be somewhere in Central America.

INTERVIEWER: Somewhere in South America?

PARTICIPANT: That's what we'd be looking for.

INTERVIEWER: Um. And why would you use South Ameri- ...in what context would you say South America...

PARTICIPANT: The biggest market for this will be in the US.

INTERVIEWER: Sorry?

PARTICIPANT: The biggest market for us will be in the US. So to have something relatively close at low cost...and that's why we're thinking Mexico...um...possibly the Caribbean...We've looked at the Dominican Republic. So, again have...you know some [unclear - 0:18:29.0] clothing manufacturer who makes...clothes, so...

INTERVIEWER: And do you consider bringing it back to the UK or people that's...

PARTICIPANT: That's our long-term goal.

INTERVIEWER: And how many...how long do you think this could possibly be?

PARTICIPANT: It would certainly be in excess of five years.

INTERVIEWER: In excess of five years?

PARTICIPANT: Yeah. So one of the things we're thinking of is much more...um...looking at basically balance sourcing. So what we could do is have maybe the bulk of production overseas but maybe for short runs or dedicated runs they would be produced here in the UK. Yeah? So we would have maybe volume overseas; customized short runs, fast turnaround, high quality...that would be manufactured in the UK.

INTERVIEWER: Okay. So kind of like a fast fashion concept, really?

PARTICIPANT: Yeah.

INTERVIEWER: Would you say that you'd provide that to kind of like a limited range or a limited...or would you say that would be kind of like an overall concept that you'd be looking to kind of offer?

PARTICIPANT: Yeah, I think where we have particular customers...so could be that...um...say Triumph, because it's a UK brand, they may want to lever the fact that their brand is UK and therefore they may really press us to have the manufacture done here in the UK. So there's going to be a range of different issues.

INTERVIEWER: And for example...so when you talk about manufacturing, perhaps bringing it back to UK, I'm presuming it's going to be the actual manufacturing the product...

PARTICIPANT: It will be the manufacturing of the fabric.

INTERVIEWER: Manufacturing the fabric...

PARTICIPANT: And then the making up of the garments...making of the garments themselves.

INTERVIEWER: Manufacturing the fabric. Okay, so considering the manufacturing of the fabric, now I'm thinking about the brand origin. How important do you think...how important do you think is the relationship between a brand and its country of origin in general terms?

PARTICIPANT: Could you say that again? How important is...?

INTERVIEWER: How important or not do you think is the relationship between a brand and its country of origin? So for example quote where they're manufactured...or it can be from a manufacturing perspective or a branding perspective.

PARTICIPANT: For us, at the present time, our customers really don't care where manufacturing takes place. But I think for some customers they will be looking for UK production. Now that clearly will have an effect on price point but it also, really is associated with the skills and the capacity for production in the UK. When we looked initially, we just could not find anyone able to produce in the UK. So one of the things we now have to do is to bring that in-house. So instead of just buying in manufacturing fabric we may have to bring those skills...develop those skills and then bring the actual production in-house.

INTERVIEWER: So by 'develop' those skills do you mean, kind of train the staff?
 PARTICIPANT: Indeed.

INTERVIEWER: Okay. And when you talked about the capacity of...um...you kind of mentioned something about the capacity of kind of level. Could you explain that a bit as well?
 PARTICIPANT: Yeah. We couldn't find anyone in the UK able to produce denim, even sophisticated denim that we're producing, at the correct price point. So what I'm thinking is we will have a range of different customers, basically people will be buying the Bull-it brand on the basis of performance and that will mean that the price will be low.

INTERVIEWER: Right.
 PARTICIPANT: If we're producing for Harley Davidson then the price will be high, okay? And that will give us maybe a bit more capability of producing in the UK, rather than being pressed in terms of price, yeah? That's really one of the things.

INTERVIEWER: And how do you emphasize on the Britishness?
 PARTICIPANT: Yeah, what we're trying...what we're trying to do is to say (Company M) basically is a technology company that develops specialty fabrics. Bull-it is motorcycling garments and we sell garments into that sector.

INTERVIEWER: Right.
 PARTICIPANT: So the (Company O) brand is very much a technology company. We have the ability to produce and develop new types of fabric which don't exist; don't have that specification; don't have that performance. You can't get them anywhere else. (Company O) can then license those fabrics to Bull-It in terms of motorcycling or it could license it to outdoor clothing manufacturers because it's got...so (Company O) is a fabric developer.

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INTERVIEWER: Yep.
 PARTICIPANT: Co*** is a garment supplier.

INTERVIEWER: Supplier...right, okay.
 PARTICIPANT: Yep.

INTERVIEWER: But...is there any way you kind of promote (Company M) as being British...is it kind of used as a branding strategy would you say or not?
 PARTICIPANT: Yep. On the (Company M) website it's clearly flagged as a British company.

INTERVIEWER: Okay.

PARTICIPANT: Yep. So the whole purpose is to establish the (Company O) brand as British and as a technology company. so we don't care what the end user uses; we can develop which basically no one else can match.

INTERVIEWER: Okay.

PARTICIPANT: And that's what we do – hat is the (Company O) brand. The swing ticket, basically that's the [...]It jeans and that's the (Company O)...

PARTICIPANT: So, the jeans will be sold as [...]It but it would say, basically (Company O) inside. So, like double text. That's basically the model that we're trying to...

INTERVIEWER: Yeah, right. Okay

PARTICIPANT: Yep?

INTERVIEWER: so according to your brand (Company O) I presume the best, the important part is country of parts then? Or the material? Or is it...would you say...is it the branding strategy or would you say it's the material that is more important to you?

PARTICIPANT: It's the material. So, we're trying to develop materials that no one else can produce.

INTERVIEWER: Okay. Okay, now in your opinion, which dimensions of COO are more credible or ineffective to a brand in your opinion. Just in general.

PARTICIPANT: Okay. It's the fabric development.

INTERVIEWER: Okay.

PARTICIPANT: That's the (Company M) brand. That's what we're trying to develop.

PARTICIPANT: Fabric development, okay. So that would say...and in general as well would you is the same for most brands?

PARTICIPANT: That's the key element of the Company O. That's really what we want to do. To develop...we've got a range of ideas, a range of different fabrics that we're going to be developing over the next few years. It's not about the garment, it's about the fabric.

INTERVIEWER: It's about the fabric.

PARTICIPANT: It's about the fabric. That's the purpose.

INTERVIEWER: Do you think it's the case for more so the brands as well, do you think it's more so the fabric in general terms as well, would you say?

PARTICIPANT: Basically the business model is about (Company M) being supplied to a range of different companies and they will be selling it as their brand but it will actually have the (Company M) label...

INTERVIEWER: Okay.

PARTICIPANT: ...and so it's (Company O) inside, yeah? So it would be Harley Davidson garment, it would be Triumph garment, it would be Kawasaki whatever but on the garment itself it would show (Company O).

INTERVIEWER: Okay.

PARTICIPANT: Just like Gore-Tex.

INTERVIEWER: Right, okay. And what does (Company O) say...where does (Company O) come from?

PARTICIPANT: Okay. (Company O) is basically a meld of Cotton and Vectran. Yeah? So Cotton and Vectran becomes (Company O).

INTERVIEWER: And does it have any sort of association with any, any kind of history or...

PARTICIPANT: No.

INTERVIEWER: No...any particular reason they've kind of chosen this name? Or...

PARTICIPANT: Just because cotton, Vectran...put the two together... 'Co-***'.

INTERVIEWER: Okay, and is that what you kind of use in the fabric? Okay...

PARTICIPANT: That's where it came from.

INTERVIEWER: Okay. Um, so do you kind of see (Company O) in any future kind of developing into a brand or it's more...kind of...

PARTICIPANT: That's the point, it is its own brand but it's...the brand is not the garment; it's the fabric that goes into the garment that can be branded as somebody else.

INTERVIEWER: Yep.

PARTICIPANT: But the important thing is it would show (Company O) as the fabric. So the application is very much...there are a serious of different international brands that we could supply the fabric to.

INTERVIEWER: Okay.

PARTICIPANT: So, whatever it's sold as, in terms of garment form, it would still show the (Company M) as the fabric.

INTERVIEWER: Okay.

PARTICIPANT: And that's the key thing.

INTERVIEWER: Okay, but kind of...um, I kind of mean it in a way that...do you, kind of...now, if I go back to asking about, for instance I understand that (Company O) is, um, fabric supplier. I mean as a fabric supplier but you are kind of using your own brand strategies as well by labelling it in other brands.

PARTICIPANT: Correct.

INTERVIEWER: Um, but it's future ... the impact of branding...?

PARTICIPANT: Just back tracking. As I say, (Company O) initially is developing the fabric; [...]It is our own garments. So we actually manufacture garments which we sell. Okay? Into the motorcycle industry. The interesting thing is that other brands in the motorcycle area want to use the fabric in a slightly different form. So, basically what we're doing is we're manufacturing the fabric and supplying to different brands. But we do have [...]It as our own brand.

INTERVIEWER: Oh right so....

PARTICIPANT: So the idea is that we've developed (Company O) denim that we can make into garments and we can sell. That's what we're doing and we can sell that as [...]It. We can then talk to other motorcycle suppliers and they say, 'We want to have a slightly different fabric and we're going to sell it as Harley Davidson' (or as Triumph or whatever).

INTERVIEWER: Right, okay.

PARTICIPANT: Okay?

INTERVIEWER: Yes, okay that makes sense now. So you're basically saying...

PARTICIPANT: So (Company O) basically can supply into its own brand or can supply to other brands.

INTERVIEWER: Okay, so...thinking about [...]It for example now.. would you say [...]It is a retail brand?

PARTICIPANT: It's a retail brand. Yep. So we, we sell...we can sell online, which we do. We also now have bulk here in the UK and Australia and America. We have access to basically motorcycle distributors. You know you go into Manchester there will be a motorcycle shop, you can buy motorcycles, you can buy clothes, you can buy whatever. So, Bull-It will be supplying into those shops directly. So people can go in and just basically buy off the shelf so we'll be supplying into the shops and also be basically selling directly online.

INTERVIEWER: Okay. So it's like, would you say you're selling in independent stores or are they in more your own stores?
PARTICIPANT: Yeah. Um, I reckon there would be about a hundred independent motorcycling stores in the UK.

INTERVIEWER: Okay.
PARTICIPANT: And we're looking to supply into about 60 – 60 distributors.

INTERVIEWER: And any of your own stores?
PARTICIPANT: We would never have our own stores. We sell online and people can go onto the [...]It site. They can order, it can be shipped out to them...

INTERVIEWER: Okay.
PARTICIPANT: Um...

INTERVIEWER: Any particular...I mean what now in terms of...okay so now it's kind of taken a shape now. So, what I'm trying to...so obviously you're supplying to Bull-It's kind of selling it within independent stores.
PARTICIPANT: Yep.

INTERVIEWER: So, what are the differences between retail and wholesale.....
PARTICIPANT: So if you go onto the Bull-It website you can order garments, you can actually buy them directly, directly there.

INTERVIEWER: Okay, but what would you say is the difference between a brand sold in an independent store...so obviously we've got you selling on your own on your rep side but you've not...it's kind of not selling it under its own retail...like a physical store, for example.
PARTICIPANT: We've got no plans to.....to create our own stores.

INTERVIEWER: Is there any particular reason you probably wouldn't?
PARTICIPANT: Basically because the independent motorcycle retailers supply a broad range of different things. So someone is likely to go in to buy leathers or a helmet or whatever and all of that content will be in that retail shop.

INTERVIEWER: Okay.
PARTICIPANT: Okay. So the Bull-It jackets or the jeans would be part of their offering.

INTERVIEWER: Okay.
PARTICIPANT: It would never be a dedicated shop purely for jackets or for denim, yeah? That would be part of a broader offering and that's why we supply through retailers.

INTERVIEWER: Right, okay.

PARTICIPANT: Yep?
INTERVIEWER: Yep. So, would you say there's kind of brand or awareness within this as well?
PARTICIPANT: Well, we're trying to build [...]It brand. It just means that we have to do that through the retailers.

INTERVIEWER: Right, okay
PARTICIPANT: Yeah?
INTERVIEWER: Yep.
PARTICIPANT: So we can promote through social networking or whatever. We can promote the [...]It brand and we can direct people if they want to purchase through the independent retailers.

INTERVIEWER: Okay.
PARTICIPANT: Or they can buy directly online.

INTERVIEWER: Okay, and what would you say are the benefits of selling it directly online or...

PARTICIPANT: For [...]It basically we can design and we can have it manufactured in the format that we want. We can then sell it online, so people can visit the website, they can see exactly what the price is, and they can order it online. They can pay for it online. Basically we ship it out to them. The alternative is if people want to go and see it they can go into one of the independent retail motorcycle shops and they can see the range – you know the product is there. If they like it they can order it, they can buy it, whatever. If we were to supply to Harley Davidson, basically Harley Davidson are selling, we're not. We're supply to them, they have the brand. They have the sales, they have all the control. We're a mealy fabric supplier. All we say is, 'Here's our price and by the way put on the little tag that says this is made by (Company O)'.

INTERVIEWER: When you're selling it in stores, in independent stores, does it kind of flag up...do you kind of flag that up with your [...]It products as well or in the services, for example in terms of, for example, customised service or within your own brand?

PARTICIPANT: Yeah, they...the thing about in-store...the [...]It brand, it's very much about performance. So, the whole push is very much no other fabric can provide the same abrasion resistance. So it's very much pushing that element, rather than the fact that it's made in the UK or is a UK whatever. Okay? The entire sales pitch is very much about protection of the individual.

PARTICIPANT: So, it is very much about saying, 'This fabric, if you fall off your bike it's going to protect you'.

INTERVIEWER: Yep, okay.

PARTICIPANT: Yep? You're not going to get skin burns, it's going protect you.

INTERVIEWER: Okay.

PARTICIPANT: That's what it's all about.

INTERVIEWER: So that's kind of communicated in the actual sale of services as well that's provided in stores.

PARTICIPANT: That's it.

INTERVIEWER: Okay, that's fine, but you...so...but obviously so when you're saying about performance do you not at the moment because, like you said, your customers don't care about where the product is made.

PARTICIPANT: They don't care where the product is made.

INTERVIEWER: But do you think they care the fact that it's got an English technical aspect or would you think it's more important to you as a brand really than a customer?

PARTICIPANT: Okay, um, people who buy the jeans currently are interested in the performance of the jeans. They don't care about where it's made and they really don't care about the technology behind it other than the fact that it works. If they actually look and go back to the (Company M) website they will see that it is from the UK. But I don't think at the point of purchase anybody currently would actually be too concerned about country of origin. It's very much about whether it works or not. That's what people are interested in.

?

INTERVIEWER: And do you carry out a market research on brand perception?

PARTICIPANT: We have a dedicated PR company. So, they basically will be tracking things like Twitter, Facebook, statistics, (all that sort of stuff) hits on the website. We do all of that.

INTERVIEWER: Okay.

PARTICIPANT: We can do all of that.

INTERVIEWER: And is there any particular, how would you say the results are used to develop...or would you say are they kind of used by the developers, services or...?

PARTICIPANT: Probably it's too early to decide.

INTERVIEWER: And do you think COO impacts....

PARTICIPANT: At the present time it has no impact at all but I would say again...you know made in Britain, made in the US...

INTERVIEWER: Yep.

PARTICIPANT: Carry particular...um...you know attractive...

INTERVIEWER: Okay, and is there...?

PARTICIPANT: So, so if we could make a top of the range...denim in the UK that we could sell, that's what we would want to do. At the present time that's not where we are. So maybe, as I said, in five years' time, maybe that will change.

INTERVIEWER: But you said that the 'made in the UK' sells, for example...

PARTICIPANT: 'Made in the UK'. Um, it's where we would like to be and I think a lot of companies are looking at, you know John Lewis, for example, is looking to increase the supply of fabric sourced in the UK...um...a lot of interest now in re-shoring...um...you know hopefully that will continue...um...but we've got capacity issues, we've got skills issues and we've got labour costs.

INTERVIEWER: Yep. And what do you think is the country image of British in terms of garment production...

PARTICIPANT: The UK has traditionally had a very, very strong design...

INTERVIEWER: Design...okay.

PARTICIPANT: Um...and it also has a great heritage.

INTERVIEWER: Okay.

PARTICIPANT: Yep. So the likes of Burberry's, Johnstons of Elgin, and those guys are established brands over the years and they are associated with UK.

INTERVIEWER: Yep.

PARTICIPANT: Even though some of the production is actually overseas. I think basically you're looking at made in the UK is your design and also gives you quality.

INTERVIEWER: Design and quality.

PARTICIPANT: That's what associates with the two things...and that really is if we were able to manufacture in the UK, that's what we would push.

INTERVIEWER: How important is it to you as a brand then? So how important is the British technical aspect to your brand and why? So obviously you're flagging up the British...

PARTICIPANT: We are deliberately because...yeah, the UK is still strongly association with textiles... ..and the Industrial Revolution, so it's got a long history, a long pedigree that's really what we're trying to flag.

INTERVIEWER: Okay.

PARTICIPANT: Yeah? Um...so in effect, 2015, the UK is still able to produce good quality, high performance fabrics which can sell around the world.

INTERVIEWER: Yep.

PARTICIPANT: The UK also has a MMU (Manchester), Leeds, Heriot-Watt strong, still a strong textile research base.

INTERVIEWER: Yep.

PARTICIPANT: So, we would like to see (Company O) associated with that base. So it's something that we can do in the UK technically, scientifically...

INTERVIEWER: Okay.

PARTICIPANT: ...academically, that can't be done elsewhere.

INTERVIEWER: So it's more the UK...it's more the fact there's quite a strong heritage/history of textiles?
PARTICIPANT: Heritage, and also a very strong academic science base. That's really what we're trying to trade on.

INTERVIEWER: Okay, excellent. How does this impact a brand image for the business in general? Or do you think it does?
PARTICIPANT: No.

INTERVIEWER: It doesn't?
PARTICIPANT: I don't think it does.
INTERVIEWER: Okay...that's it.
PARTICIPANT: Brilliant.

Company P: Textile Research

- INTERVIEWER: Can I just firstly ask you your length of employment...sorry, what's your role, please?
- PARTICIPANT: My role is research for the (Company P). We've been working for two to three years and I've been doing the research for over two years.
- INTERVIEWER: Okay.
- PARTICIPANT: The (Company P) is an industry-led initiative. It is to try and stimulate growth in the textiles sector...
- INTERVIEWER: Okay.
- PARTICIPANT: ...by supporting indigenous investment, inward investment and to address opportunities and barriers to growth facing the sector, in particular if that's to support or identify opportunities for re-shoring activity.
- INTERVIEWER: Right.
- PARTICIPANT: Three main pillars are activity are innovation...
- INTERVIEWER: Uh-huh.
- PARTICIPANT: ...research and development in the sector. Skills and employment and recruitment challenges. And finally investment. This could be an inward investor from somewhere overseas, but more recently it's been the management with the Business Growth Hub Economic Solutions, the National Textiles Growth Programme, which is a regional growth fund for textiles of £12.8million. We've been operational for a year.
- INTERVIEWER: Uh-huh.
- PARTICIPANT: We've worked with 94 companies. We've supported 1600 jobs...
- INTERVIEWER: Okay.
- PARTICIPANT: ...and leveraged over £30million of private investment on the back of roundabout, very roughly, £9million-worth of grant spending. So we provide grants which are matched by private industry, private sources in industry, to grow the sector.
- INTERVIEWER: Right. And what...just at the start when you talked, how did you say? Is it Allia...
- PARTICIPANT: It's the (Company P).
- INTERVIEWER: (Company P), right.
- PARTICIPANT: Named after Lord [...]
- INTERVIEWER: Yeah, right.
- PARTICIPANT: ...[...], the Lib [...] peer who initiated our work on the back of some research he did...
- INTERVIEWER: Right.
- PARTICIPANT: ...that identified that it could be profitable to re-shore and manufacture certain parts of textiles within the UK. So it was a very high-level study which then defined that lots of parts of the vertical supply chain could be profitable – some more than others – and then called us to do a more deeper piece of research, which we did over two years, probably the biggest piece of research in textiles in this country for the last 20 years...which spoke to sixteen major retailers...from a variety of channels, high street and online. And we've probably spoken to over 200 manufacturers now. And the retailers and manufacturers give us the input prices, how much it costs to make bits of garment. Everything from T-shirts right through to luxury...couture, to see where the proposition was strongest for manufacturing in the UK. And the closer you go up the price points, the more

value-added and design in the process, both more profitable and more secure it is in terms on on-shore and re-shoring production. That said, at all price points there's a different, slightly different economic case, depending on what products we are looking at. So where you can make things in a very highly automated matter or things that cost a lot to ship around the globe which are heavy, such as some parts of homeware, then it is viable on-shore. Equally, soft separates (blouses etc.) can be made profitable, including those you'll know as 'fast fashion'...where speed of supply helps deliver product quicker. And the key factor wasn't really oil prices, energy prices, although they're important. It was the margin erosion of product. So having a rapid supply of product close to market enabled them to be more acute with their ordering.....and manage other risks, which when you looked at the full economic costs – and retailers hadn't, surprisingly, looked at the full economic cost – including the cost of time, overstocks, oversupplies and having to discount product which doesn't sell, when you look at the full economic cost, then it does start to stack up in an economic case. And again, refer back to a publication that we've just launched this week (I should be able to give you a PDF of it later this week), called The Alliance Report.....and all our findings in that. And if you've been following contemporary narrative about re-shoring, there's no big surprises in there. It just confirms what we thought, but really does hone in on this issue of both the value of design – you know, proposition being a higher price point but not only higher price point – and the key issue of margin erosion. You know, sell-through rates, discounting etc.

INTERVIEWER: And in your perception, what does 'country of origin' mean to you?

PARTICIPANT: 'Country of origin'?

INTERVIEWER: Yeah.

PARTICIPANT: Um. From our initiative, it's about really showing manufacturing and it isn't a production and also where possible all the inputs are manufactured within that country of origin. So there's quite a detailed narrative and journalism about British products or British brands.....which are not made in Britain. A lot of the manufacturers are very upset about...um...brands, retailer brands say, 'thoroughly British' when none of it has been made (other than the design) in Britain. Now Britain does have a fantastic design industry and that is important.....which is good, so that is part of brand Britain. But if it's about British product, it has to include part of the value-added processes which are used to manufacture. So 'country of origin' to me means the majority of the product is made in that country of origin.

INTERVIEWER: so you have mentioned about several other dimensions and that they have the design element there, would you say?

PARTICIPANT: I don't want to paint broad-brush statements but there are retailers who have a brand which is maybe branded as 'thoroughly British'...when it is just a design which is then exported off seas.....and made in Romania or China. So that is misleading to the consumer. So 'country of origin' does mean that the actual product inputs – the majority of them...a recognition that you might not be able to source button or zip, for instance, or you might bring other value-added bits of the process in.....but the majority of the product, a garment, say, is made in the UK.

INTERVIEWER: Yeah, right. So you're referring to the UNCLEAR [0:08:16.6] manufacturing, like UNCLEAR, would you say?

PARTICIPANT: I'm referring there to the manufacturing element.

INTERVIEWER: Yeah.

PARTICIPANT: Uh...but I don't think you can separate the retail and the manufacturing element out. Um. It's true to say that a lot of factories have realised that to have their own factory brand...provides them with an economic opportunity and allows them to spread production throughout a year.....so they can produce for retailers at the same time they can produce their own factory brands.....to manage the flow of production, and that's been a real good opportunity and a lot of them are developing excellent brands, Best of British brands as well.

INTERVIEWER: And how important do you think they are...to brands or companies and industries particularly?

PARTICIPANT: I think the fact things are designed in Britain's are great and that is important that we have the best...we're well known for design. We have some of the best designs in the world, across a range of manufacturing elements. But I think if we're taking seriously the opportunity for rebalancing the economy and growing our economy and having products with the country of origin, manufacturing is equally as important as design in terms of it being, you know, in this country, British. Um. I'm not going to decry retailers who have British designers and they're exported to China and made and brought in. That's fair enough if that's how they're sourcing, then fair enough, but I would like to see an ability for us to have the capacity and capability to produce everything from samples to final products in the UK. And our research shows that this is not only permissible to do profitably in the UK, but we should actively encourage it because there's a huge opportunity for jobs and growth.

INTERVIEWER: In your context, what would you refer to when you say you've got the best British designers? Is there a particular element, would you say?

PARTICIPANT: No, I couldn't possibly comment. I don't really have a detailed and informed view. I mean, it's everything from British fashion products, it's everything from brand management, you know, versus... ..right through to actual technological garment design, whether that's how it's produced or how it handles. So it covers everything, like I think we've got excellence in both...but I think there's a great opportunity to glue that to British manufacturing.

INTERVIEWER: what are the benefits, would you say?

PARTICIPANT: The feedback we've got from the research and dialogue with manufacturers is that in all the shows this year, they've really stormed the chase on every other country in terms of the quality and resilience of the fibres, yarns and fabrics are much, much better than anything else that's out there, particularly in the woollens industry...

INTERVIEWER: Right.

PARTICIPANT: ...beating everybody – Italians – hands down. Really surprised about the quality of the product. And that's something to do with the process product...uh...process in the UK. Hundreds of years of expertise, I guess. So I like to think that's British major products. Certainly the product inputs are of the highest quality in the world and I would probably expect our manufacturers to claim that they are probably the best in the world at what they do, but if you look at what's been invested in supply chains and manufacturers overseas, the technological processes, productivity is probably much better than ours. Perhaps playing a little bit of catch-up on how productive we are at making garments, for instance, but we get away with it because we're able to...um, play off the luxury cache in terms of branding, in terms of the product inputs etc. being higher quality and taking slightly longer to manufacture stuff, we can get away with it still profitably. That's more about the price point.

INTERVIEWER: Right, the price point, okay. But you've just kind of mentioned about the technology and, and investment.....?

PARTICIPANT: Overseas have probably they've invested more in the actual supply chain and garment manufacturing and there are plants in China probably the most productive in the world. But again, we're able to steal a chase that the product input quality, such as using the best British cloth, but also the proximity between supply and demand within the UK. Um, making it more profitable. But the actual productive processes in some of the factories around the globe, it's sort of a myth to think we're a) more productive and b) that we, you know, are able to use that productivity to make things cheaper. 'Cause it isn't a low-cost country, low labour cost country, the UK.

INTERVIEWER: And do you see them coming back any time soon?

PARTICIPANT: Well we've seen within our RGF (Regional Growth-Funded programme), it's difficult to claim everything into re-shoring. Everything in there is additional to, rather than displacing activity, so you could argue everything if it wasn't made here would have gone somewhere...and more likely than not it would go to existing markets overseas, but we have got actual investments which you've said, because you've provided this ground, we are re-shoring and there's numerous examples of that. Um, so we've done really well on our exports – clothing exports. We've done really well. And we're doing really well in terms of, uh, upping our capacity in April in the

UK in textiles, which is allowing some people to also think about re-shoring. We've got some examples where they've moved activities from China or Eastern Europe to the UK, mostly to be closer to design, like closer coupling between design and production. Mostly it's for fast fashion reasons and also that kind of quick turnaround from production floor to shop floor. Which reduces margin erosion...

INTERVIEWER: Right. And do you think it's going to have an effect on...an increase on the sales floor?

PARTICIPANT: Um, increase in the volume of sales? In the UK? The fact that you're also in demand enables you to supply a product to certain things, but at the end of the day it's wider economic conditions, isn't it, that governs how much money people have in their pocket and therefore to purchase. Um, what we've seen is the 'Made in Britain' range has been well received. It could be perhaps better coordinated etc. and better managed within the supply chain. Whether it continues and it continues to pay some becomes a norm, it's not just the Best of British but when you go into a major high street retailer and half the products are made in the UK.....remains to be seen. We'll not see a wholesale change of textiles back into the UK, so everything from, you know, bed linens to clothing are all produced here... But there's enough examples in the press and that we've seen on our investment programme to say that a tide has changed, just the scale of that change is difficult to be precise about. I mean, our own figures, looking at employment intentions and change in input and export UNCLEAR [0:16:45.8] would say crudely, you know, 5,000 to 15,000 additional jobs within the course of the next ten years. And PWC said we were being a little bit too harsh on our own figures and they said the figure could be more like 20,000 in ten years, so like 2020, another 20,000 people within the textiles industry within the UK. But that's nothing compared to, say, ten, twenty years ago when there were 20,000 to 300,000 employed in the sector and now today we have probably 90,000 or 100,000 employed in the sector, which I have a very tight definition of 'yarns, fabrics, clothing and leather'. UNCLEAR [0:17:25.3] codes 13-15. Um, so yes, it's interesting. It is nice to see and interesting to see that something is happening as a result of what people UNCLEAR call re-shoring. It is good to see and it means that there is investment and there is jobs for the first time in the sector in...I've seen in a lifetime, where all the other econometrics show the sector going down and we've seen a levelling-off and an upturn include in exports. What I'd like to see is an erosion of imports and continued growth in exports to reduce a £12billion, £13billion balance of trade – so we import more than we export. £13billion-worth of product. Right. Um. Okay, so one more question I'm just going to ask I, um, in terms of country parts (by saying this, I mean the materials)...how important do you think that is to the manufacturing, would you say? It's important that we grow that capacity and capability because if our garment produces our UNCLEAR [0:18:30.5] opportunity, they will soon start to run out of product inputs and we've seen that.....perhaps even in the press with shortages of wool and yarn, fabric in the UK. All sort of...two years and playing catch-up now and it's a great opportunity for fabric producers. So if you're producing a 'Made in Britain' product, then it's great to see the majority of that product's input including yarns and fibres and finished cloth is made in the UK. And having that capability close to the other vertical supply chain, if you will, and that close to is critical. If you can't, then you revert back to having to source things from overseas... ..and everything else that comes with that, including time and risks attached to that. And costs.

INTERVIEWER: Like the country parts. Are they...are they...are the country to bring them actually the...?

PARTICIPANT Yes, there is usually a reason why people come into this part of the country because there's a wealth of labour and expertise...and demand in the upper reaches of the supply chain...the vertical supply chain. The garment-makers are demanding more cloth and if they can source it locally at high quality locally, um, it's great for them, but it also reinforces that authenticity of British-made products, so they can say, 'Not only is it finished here in terms of trimming.....but the cloth is made up the road.' People buy into the story and the message that brings as well. We've seen that. Our garment makers say, 'Well what we can do is sell the world's best fibres, yarns, which we source locally.' So a lot of the luxury product sells in that kind of...it's all made within twenty miles of the factory. But it's not a material issue. I mean, if you're making, for instance, poplin shirts, Oxford-weave shirts, for instance, then you're...it's quite hard to source volume cotton fabrics in the UK. You're going to get your shirting fabrics in from China and you're going to finish them here. Or you're going to make them all here,

whether that's made-to-measure off-the-shelf or bespoke shirts. So that's going to happen, you know. Employers are not going to draw a distinction. It's quite nice for them to be able to say, 'Our cloth is sourced locally as well,' but you know...we're quite a long way off, I think of making high volume of towelling or, uh, cotton in this country. You know, as fabric or as finished yarn. And maybe that'll come should demand reach a pivotal point where it can be made economically efficient. Our detailed modelling suggests it can, but it's very challenging and it's someone with large, deep pockets and waiting a long while to get their investment back before we have cotton spinning mills in this country. As you know, it makes a lot more sense to have it close to source where the cotton's grown. So that's why I think, you know, that heritage in the woollen industry, um, proximity to the supply of wool, um...and having a vertical supply chain, including dyeing, finishing, spinning, weaving of woollen products, is probably one of the remaining strengths of the UK. Whereas most of the cotton mills, obviously they've gone close to source. And close to demand as well, so no big surprises. You know Pakistan and China. America's an interesting case in point, where garment finishers are mostly in South America, you know, Mexico, South America way. Whereas... 'cause the proximity to the cotton mills. But their textile spinning sector is having quite a resurgence as well, 'cause obviously they grow it as well. And they've got an increasing demand for close-shore, if you will, production of finished products. So they're having a real growth spurt, particularly around the spinning and weaving of fabrics in America. Whereas in this country I would guess it's sort of heritage wool and cloth and it's garment, country garment making, which seems to be leading the charge. As well as, you know, heritage knitted, whether Scottish or Yorkshire knitwear industry.....seem to be doing quite well.

INTERVIEWER: So, um...so we've talked about how the cotton is grown in Pakistan and China. Is there any other particular reason why...apart from that economic or the proximity...is there any particular reason that it's going there and not here?

PARTICIPANT:: Um...well the garments...the inputs...like raw cotton you can only grow in certain parts of the globe, whereas woollens you can have sheep in Yorkshire or Scotland.....or imported from...what is it? New Zealand, I think. So it's a climate thing in terms of growing...It's a climate thing.

INTERVIEWER: Okay. And you've talked about the fact that the luxury products are But what other retailers...? Do you think the retailers are kind of...?

PARTICIPANT: Yeah, the luxury end there's obviously certain retailers operate in that space and high price point in luxury. And mid-market soft separates is profitable, particularly where you're reducing margin erosion. That is a space that they do well in. First of all the kind of 'Made in Britain' range, and those kind of mid-market soft separates which seem to be able to make economically viable due to reduced margin erosion. But that's not to say that like the AMA Group, who are doing contract stuff on big orders for things like leggings, which is great. In other words, if there are quick stock-outs, they can get a call up from the store and they can switch the machines going. So those things we're doing really well. It's really good to see long-term contracts from retailers purchasing at scale, 'cause factories can only operate really at scale. It's when you break that down and do short runs, colourways, sizes... styles of certain range, and you're placing orders of 100 or 200, it gets quite challenging to make that efficient...in a factory environment. 'Cause factory manufacturers/owners hate small, inefficient runs. They just like to set things up and, you know, make them...

INTERVIEWER: Right, okay. And so how important or not do you think is the relationship between a brand and its country origin in general?

PARTICIPANT: Um, I think it's critical. As I said, I can't see that somebody advertises as a thoroughly British product and the other thing is it's come off a...somebody's design floor in the UK. I'm not decrying British design but by the same token, if it's a thoroughly British product, it should have thoroughly British product inputs. It's not too nationalistic; it's just mis-sold, isn't it? It's sold as a British product. And the other thing is the intellect behind it is here. Yeah, great. We've got great designers, great intellect, great brands. But the brands have to be authentic, don't they? And if there's nothing else British about it, it's quite questionable people who are selling on that thoroughly British approach where...the only thing that was British about it was that it came off a design

desktop in London and that was it. Right. Okay. Um. And a lot of kind of...I'm just going to kind of see...you've got a lot of, like, brands like, like the fast fashion brands, and they're like River Island, Top Shop...and all these fast fashion brands. They're also starting to go into a bit of wholesale than it was...they're starting to go into a bit of wholesale...

INTERVIEWER: you've touched upon the fact that they're selling it but...would you say that they're manufacturing as well, or is that just the design element which you have to...

PARTICIPANT: I think that's their business models. There's one where they commission it from a couple of different factories. There's one where they invest heavily in their own production facility.....in the UK model. One's where they spread it out. One is where they have maybe two producers and almost like a sole relationship. It's not the same firm but basically the factory is the key and sole provider...so most of their work is for them, so it's like UNCLEAR [0:27:36.0]. And then the third one is the sense where they directly invest in it. It's because it's their facility.

INTERVIEWER: Okay. And do you kind of...I'm presuming you guys carry out brand perceptions or ...

PARTICIPANT: No really, no.

INTERVIEWER: and What do you think...about it?

PARTICIPANT: I think it would be well received. I think there's been a surprise at the price point. There's also recognition that it is doing well because there are discerning, more discerning customers within the consumer spectrum who are interested in 'Made in Britain' brand authenticity, luxury and quality etc., so there is a groundswell. I think there is perhaps (I've not got stats to prove it, but other than statistics from Intel would suggest), male consumers 25-35.....seem to be leading charge of growth in the market, particularly for higher price point and the 'Made in Britain' brand. You know, there seems to be something about that. Um. Um. And I think more could be done to push the 'Made in Britain' approach. A little bit fragmented. High street presence in a couple of flagship stores but not all. Both retailers all working together to push to 'Made in Britain' brand and a big, highly visible exposure.....at similar times of the year, pushing it. Um. And presence of that brand and approach on the websites. First, when it first came out, 'Made in Britain' brand across a few of the providers, three or four well-known high street retailers, it was quite hard to find on the website, and when you did, it was a bit marginal, where you discovered the product ...and you thought, 'Oh, that looks nice. Oh, it is made in Britain. Great. I didn't know that. Why are they not pushing that further?' There's a lot more I think could be done between retailers. And I think there's a bit of...I get a sense there's a dissonance between the ways men's and women's 'Best of British' products were promoted. Some people said, 'Oh, the men's 'Best of British' fabulous, utterly stunning, and the women's looks like something out of 19-, you know, what your grandma might think about wearing,' so...I think there was something more to be done about what's in, uh, the actual ranges and how they're pushed.

INTERVIEWER: So do you think brands are kind of pushing their brand out more than actually pushing their country products now, would you say?

PARTICIPANT: It's a good question. I couldn't answer it accurately, only I speak as I find.....and there are a narrow set of high street, uh, and smaller retailers who push a thoroughly British brand and trade off that and that is very important to them. But the stuff behind that, where it's actually made, the story behind where it's made is completely ignored. So a window display, promotional designs is about the British-ness of design.....but nothing else.

INTERVIEWER: I mean in terms of brand image. Which one would you say is more authentic?

PARTICIPANT: For me the importance is the authenticity of the product's inputs, not just the makers who made the final garment, but there was a story to tell about the sourcing of the fabric etc. And it's not just a kind of bullshit story. It is about the fact that the actual cloth, for instance, made in Yorkshire. It's the quality of it, the resilience and robustness of it. It's better than anything else in the globe.

INTERVIEWER: Uh-huh.

PARTICIPANT: In part that's to years of experience but also the way they finish the yarns and the fabric and the water etc. So places like Yorkshire do very well to have the best product inputs in the world. It's nice to see that being part of the story and something which can be strengthened, I think, in the 'Made in British' family. You're not just paying something more expensive 'cause it's just made by machinists over in the UK. That has a whole story of quality behind it.

INTERVIEWER: Yeah, but consumers...do you think consumers actually have that knowledge?

PARTICIPANT: I don't think consumers fully have that knowledge. You can argue whether they want it or not, but they don't probably have that full knowledge. I think the people who are buying in the space, the real luxury end, do. There are a lot of dialogue bloggers, um, fashion magazines about all that that I've just mentioned.

INTERVIEWER: Right.

PARTICIPANT: So there is a groundswell taking place in it. But your general person in the high street girl: 'God, £15 for a pair of socks? Why, you're having a laugh!' 'Why's it that expensive?' So you're average Joe Public probably not. But I don't want to seem sort of like elitist and Noddy Know-It-All in that statement. But I speak as I find. There's a groundswell but people buying in those luxury and high price point ranges.....your average person on the street is probably more interested in buying consumer brands but value...over a very high value price. So they're going to go for your Nike and Adidas tops, which they might pay a little bit more than a Primark top, but they're not going to pay another 20% off...on top of that, what they'd have to pay for a real high-end brand garment.

INTERVIEWER: And do you think they'll get an extra £20 for it, for a brand to say, 'Made in UK'?

PARTICIPANT: Yeah, I think so, provided there's a strong story behind it. But it's up to the producers and retailers to tell that story. And hat you're getting for your money.

INTERVIEWER: Right.

PARTICIPANT: So I would happily pay £100 for a pair of trousers compared to £50...

INTERVIEWER: Yeah.

PARTICIPANT: ...if I knew a) technically the garment was better in terms of it was going to last longer...

INTERVIEWER: Yeah.

PARTICIPANT: ...and I wouldn't have to buy two pairs of trousers instead of one over five years, 'cause it needs replacing. And because there's a nice story behind it as well. So I think there's a lot more to play on in that brand Britain, 'Made in Britain' heritage stuff. Attached to some sort of quality rules that...not like the Emperor's Clothing but some proper story.

INTERVIEWER: Right okay. I mean...I mean...okay, the last one of a few questions...

PARTICIPANT: I have to go.

INTERVIEWER: Oh, do you?

PARTICIPANT: If you make it the last one, please, then I've got to go. I'm really busy.

INTERVIEWER: No, that's fine. I mean, the one thing I was...well it just kind of says, 'How do you think the brand messages and changes impacts the businesses in general?' How do those changes overseas, um, made in Britain...how do you think they impact the business image, I mean, sorry.

PARTICIPANT: I can't comment on that, really.

INTERVIEWER: No.

PARTICIPANT: Truly. Um. The brand is strong brand image perception and everything that comes with it. Branding obviously adds a lot of value to a product and is critical.

INTERVIEWER: Uh-huh.

PARTICIPANT: And if there are changes in the brand perception, um, you know, the brand is weakened by...

INTERVIEWER: Yeah.

PARTICIPANT: ...something that happens in the supply chain – it might be a factory disaster overseas etc. – that's going to affect hugely on the value of the product, for instance. And on the flip side, an investment in a proper brand and strong stories to tell and a well-made garment, then that's going to do well, isn't it? So I think that's your question. Branding is critical to the success of a...any product, whether you're selling detergents or you're selling...

INTERVIEWER: Yeah.

PARTICIPANT: ...fashion.

INTERVIEWER: Okay. Yeah, that's great.

PARTICIPANT: That's done. Is that alright?

INTERVIEWER: Thank you.

PARTICIPANT: I'm sorry I've got to rush off.\

INTERVIEWER: That's fine, um.

Company Q: International Director

INTERVIEWER: Can you please tell me a bit about the company's background, please?

PARTICIPANT: The (Company Q) is a not profit trade association set up [...].

It has several different roles, but one of the most important roles is that it represents the industry at government and European level. It brings the industry together, to talk about the issues that are important to the industry. And it represents the industry in government an EU level, such as standards, trade agreement sort of things. We are getting very involved in taking groups of UK manufacturers and designers to overseas trade shows, with government support, provide business advice one to one, and general services around the fashion industry. Part of that, we also run the website called '[...].org'. (Company O) has seat funded from its own resources and continues to run with some logistical support from the Centre of fashion enterprise, which is part of London College of fashion, and British Fashion Council, which is also involved, but they have very minor input in that. And that is a source of information for overseas retailers, UK companies and UK designers that would like to meet up with UK manufacturing companies.

INTERVIEWER: Your role is?

PARTICIPANT: My personal role is that I am director of business international development. So my main role is to take the UK fashion and textile companies to the trade shows and mission where they will do the business.. e.g. premier vision in Paris, Paris Fashion Week – which is our largest event with three hundred companies. Paris Men's fashion week, New York men's.

INTERVIEWER: So what is your basic understanding of country of origin?

PARTICIPANT: you mean the technical understanding. This is a complicated issue, because depending on where you ask the question, the answer will be different. So, in the UK and the rest of EU, country of origin tends to be taken as the place where the merchandises physically made into the garment. So, if its textile - its the weaving, if its garment - its cutting and sewing, its the two transformation, and that in the European would confirm as European Origin two transformation.

And the labelling is such, that in EU, you don't have to garment label unless not to garment label would be misleading. So for example, if I had a company called Paul Alger London, or Paul Alger India, and I was manufacturing outside the UK, that would be misleading, and so I would have to put where it is made. But if it was only Paul Alger, then within EU you don't have to compulsory garment label, the EU is the odd man out. So in the major market we go to, made in labelling and origin labelling are different. Sorry, made in labelling is compulsory outside the EU, regardless.

So it could be Paul Alger England, but I would still have to put made in England. And, the understanding of the origin rules are different as well, so in America or Japan, for example.

So depending on where you are, the rules are different, and it goes back to the origin as opposed to where it is made, and the origin is very much where the fabric. But if you are talking to the fabric company then they would looking at the origin of the yarn, so the yarn could be Australia, because if you look around the world – the three quarter of the world's cotton comes from Australia – so everything is coming for Australia.

So country of origin comes from country to country and is defined very much by the legal situation prevails in the each country. From a consumer's perspective, country of origin has never been a major issue, until fairly recently. But in most of the provenance – made in is a big issue, for example in Japan or in China. Retailers will always show in point of sale where something comes from. It's the Japanese Law, so they have to reveal where something is made, the China does, and the Americans will do – if it adds value to the product. In Europe it's been slightly different, there has been a naïve expectation, that something that looks like it's made in Europe is made in Europe, even though we all know that's not the case, and that is where the old world struggles in comparison to the new world. So it varies from one country to another, but Its more set out to the law of the countries, Russia for example, you will always know where it comes from – because Russians always put where something is made, etc. It's a by – in terms of crossing a border with the merchandise, because when you are

exporting, you have to declare where something is made and where the origin is from, you cannot.

Some of our companies, they think about the origin when they have to export, because they bought something but they don't really know the origin of the garment, because they don't know where the fabric came from, they just went to the trade show and bought the fabric. So that becomes quite complicated, and then if you are selling it in US- in addition, you also have to worry about the MID – which is the manufacturers identity.

INTERVIEWER: So a lot of brands are manufacturing overseas, pushing the Italian Fabric, but then selling their brands as English.. What impact do you think it has on the business?

PARTICIPANT: There is different type of answers to what type of market are you looking at. So, if you start with the UK high-street. The UK high street do not in general like the idea of compulsory made in Labelling. Designers and textile manufacturer like the 'made in', because for them it is important.

For us, our organization has UK retailers on one hand, and manufacturers on the other. So, (Company Q) and UK Government have a common view on compulsory made in labelling in the EU. If you look outside the UK, there is a north, south divide. If you look outside the UK, Northern Europe: France, Germany, UK, Ireland, Scandinavia, etc isn't particularly interested in compulsory labelling. Spain, Portugal, Greece, Italy are very interested – they want people to have to mark – Made in (country name). The eastern states are a bit ambivalent. The reason for that is because, the UK high street brands (value retailers) apply that something is made somewhere, or make the consumers feel as though this is the Italian collection, whereas, the product may be made somewhere else, i.e. Mauritius, Morocco and etc. At the lower end of the market, consumers want cheap, with latest fashion, latest colour, and if you look, the cost of fashion in spending over the last 20 years has gone down, but at the same time, houses, cinema, eating out, car and holiday has gone up.

The value fashion at the end of the supply chain as a result is subsidizing the lifestyles, the only way you can do that is by overseas production to place where people are getting paid very less. The UK was the first one to start, with M&S being one of the first companies to do this. They manufactured in the UK, as to many people did, but then it was an equal in France. Then M&S switched, the first started manufacturing in Israel, when Israel became expansive they moved to Jordan, and then from there, they moved to China, and that was pretty much the pattern for UK manufacturing. India has always been a major textile producer, and Pakistan also benefitted quite dramatically from post 9/11. Because of the air strikes from Taliban, and the American government put a lot of pressure on the international community to make sure, beneficial ways of supporting Pakistani economy. So there were deals to enable Pakistan to trade more easily, so this didn't make some countries happy, including the neighbour 'India 16.18. So it is all politically driven. So any goods going into the US can be traced technically to the factory. The idea behind was that it was after 9/11, so there was homeland security, and that was the way of making sure that US consumers were not paying the wages of terrorist. In practice, didn't seem to make any change.

And then France did the same thing, but France went to North Africa, i.e. Morocco, Algeria and other places. And that remained the case until fairly relatively, whereas, England did not manufacture anything in the North Africa, instead they went to straight to China.

And now the trend we find is that as wages become higher in the emerging economy, they are deciding to pay their people a realistic living wage, because they have too. And as the cost of fuel goes up, then you have this extra ordinary situation where it becomes cheaper or not much more expense to manufacture in Manchester, then it is to manufacture in China. So that is the situation we are finding right now. Turkey has also done very well in bringing the production back closer and quicker to Europe, which is easier to ship from, and turn around very quickly. But at the same time, it's still cheaper than manufacturing in Europe.

INTERVIEWER: And, when you talked about housing prices and etc, what was the significant factor?

PARTICIPANT: Oil was the significant factor, because as you know the oil prices are going down, and so are the shipping prices going down. So we may see that change to certain degree. So it's now cheaper than a year ago, to bring things into Europe.

The other issue with UK high street retailers, and I mean the value retailer, is probably the most sophisticated and efficient in the ruthless sense of the world I would say, is that it is the quickest in turning things around, and the cost of freight will change, and unless we start developing a whole range of supersonic passenger cart range, it is still going to take a week to get it from China, and it will still be cheaper to bring it by boat, so a lot of fashion goods we buy will still have to come by sea, which takes about 3 months, therefore, buyers will have to commit to their orders in advance, retailers don't really like that, because they want to see the sale before they buy things. So, manufacturing closer to home in UE or Turkey, even though it is expensive than China, there is still no freight or less freight attached to it in comparison, which means they can get make the decision closer to shop floor, so Turkey and Portugal becomes an interesting player, because Portugal is very hungry at the moment, so Portugal has become a very important quality manufacturer for the market.

INTERVIEWER: But isn't it still expensive to reshore to even Turkey and Portugal?

PARTICIPANT: It is, but you don't have to put it on a plane or on a ship, so you get it quicker and the differences have become less. So, if you have this is made in Europe, that goods would carry a premium, but how good that premium is still a debate. But the better end of the market carries premium and therefore, people say, I can buy this shirt for £25 from China, or I will buy this shirt for £40 from Portugal, and there is a growing percentage of a population that will say, actually I think the European product is better, therefore, I will buy it. But where it is better or not is dependent upon the interpretation.

INTERVIEWER: But I have heard in past where people may say that it may only be the last finishing which enables companies to label 'Made in Country Name', what are your views on that?

PARTICIPANT: This I think is difficult and it actually came up in the talk as well. If the merchandising has not gone through the two substantial transformations then it should not say it's made in Europe, which are cut and sew. So in order for a garment to be sold as 'Made in England' it has to be cut and sewn. In other words, the fabric has to be cut and sewn into a garment, transformed from a piece of fabric to a garment that you can wear. You may not have put the buttons on, but you need to actually make it, so it looks like a garment or a top. There are some companies that will take that to an extreme, they will have something manufactured somewhere else, and they will finish the button holes and they will finish the button. I think if those people were put in for tribunals they will actually find that, that is not what was actually intended by the law. But there are people who do it and because it is in the UK, it has not been a major issue. Trading standards have not been excessively cited about it. The British Government hasn't really accepted any responsibility for it, and then there has been inevitably been cases where people are doing that type of thing and then getting away with it, in a same way as 25 years ago, when I first came here. My first telephone call was from a member company, which I cannot name and who no longer exists, were very upset about their garments being impounded on the way from Turkey. And when we said to the customer people, "why have you impounded this collection?".. They responded, "That reason is that it came in from Turkey, but it has Made in England labels on it", so it has always been there and has happened. But the law is fairly clear, which is cut and sew. The grey area tends to be around knitwear, because you can knit, and assemble and then put buttons on and that probably does, unfortunately. That's not the intention but in practice you would knit a sweater, without panels, you could stitch them into a garment on arrival, put buttons on and call it a UK product, even though clearly, the majority of the work has been done by the knit workers, somewhere else. And that is one of the downsides of legislations. 24.35 there are often ways of manipulating it.

I have a conversation with a luxury brand that should remain nameless, were making suits, the jackets were made in morocco and the trousers were made in the UK. It's very easy to make trousers, and its nowhere near the amount of work that goes in making men's trouser, and what goes into it, and this company, there was a

house full name [Unclear] were absolutely desperate to put the made in England label in this suit, and they said, that we are sense checking with you, because we want someone to write that what we are doing is alright, and I said that I can't, because what you are suggesting is illegal. And they turned around and said, but the trousers are made in the UK, and the jackets are made in Morocco, but trousers are half of the piece of the element of the suit, so, therefore, it is at least, half made in the UK, and I was like, NO! The trousers are a separate garment, and they can be labelled made in England, and the jacket is a separate garment and will have to be labelled as Made in Morocco. 2559. And I quite convinced they probably went away and did it anyway, because that is the way conversation was going.

INTERVIEWER: From a branding perspective....

PARTICIPANT: Retailers really, I mean quality end retailers or designers by also some the increasingly value high street retailers, really like to trade on the fact that something is made in the UK, it's all part of Social Corporate Responsibility, it's all part of, and some of them are very good, and some of them have actually invested a lot of time and money on the standards, right, making sure they have ethical sourcing, and then, there are others, that don't really care too much. The problem is with the ones in the middle, the ones that don't care would put made in China, because they don't care where they are making, as they are making as cheap as possible. And so they would pass that benefit of labour cost as much as humanly possible. A good example would be NEXT. We have Lord Walson famously saying that there is no point for us to even consider manufacturing into the UK, because it is not going to viable. We disagree with that, because niche manufacturing can be possible in the UK- the kind of things Private White do for example. Very niche for a specific areas, where it is needed. I don't expect all the value stuff for example in BHs, or M&S, will ever come back to the UK. That is not likely to happen, and we don't expect that to happen. But there is an area in the middle, where there are some unscrupulous retailers that will give an impression that something is made somewhere, whereas, clearly it may be manufactured somewhere else. And, this can be down to branding, it can be down towards very small labelling that may be hidden very finely, because the British public don't usually check the 'Made in', if they see something called Julia de' Stafino., and they will assume that something is made in Italy, as somebody tells them otherwise. 28.55 retailers know that, and they sometimes play on that. Now I think that is unethical.

INTERVIEWER: So you mentioned about, how English association is important for Private VC, what are your views on that?

PARTICIPANT: I think the higher end of the market is responsible for CSR, on our designer, there is a whole generation of people, some of whom were born here, and gone and come out of fashion colleges thinking if you want to create a successful something you have to manufacture here. In the 70's, 80's and 90's, when the fashion industry in this country and other part of EU was allowed to go overseas, the government believed that these [Unclear] were twilight industries that were able to product them in India, China and etc. and they probably are more efficient in many ways, but, if you have economy like UK, where the 70% of economy is generated by services, you don't manufacturer anything, you lay yourself open to the type of stock exchanges, the crises we saw in past, or in 2008/2009, you are not self-sufficient in anything, in UK, we can't cloth our self, can't feed ourselves, we are a nation of traders and we are very proud of that fact. But if you want to pay for hospital and schools you have to physically sell some stuff and make some stuff, and, there is a whole generation of students and manufacturer, that passionately feel that manufacturers should be producing textiles and fashion, and that passion has never gone away, it has always been there. I have seen some companies lose their shirt, because they have the same kind of fashion. But we are perhaps a little unfortunates and it's very hard, I mean a lot of factories that had amazing products, disappeared.

I mean there contracts went away overnight, consumers weren't really interested in where things came from, they just wanted it cheaper, retailers always push that yes, we want it here, but even more cheap, but those generation designers that are coming and those manufacturers are saying – Phewww! Because it is slightly cheaper to manufacture in the UK, we think we got a bit of breathing space, and we think it's important to manufacture in the UK, because there is an increasing awareness that you need to be not, we need to basically rebalance our economy, we are doing a job in re-balancing our economy, but not much has changes since our

conservative were elected on re-balancing the economy ticket, but in this one area there is a lot of noise, but there is more noise than action, about we are bringing this back and that back, but there a not a lot of brand new factories opening up, and there is a lot going on but we are never going to see the same. The Mary Porte's Film for example, those raising awareness about manufacturing is good in events where there are no other jobs, but there is increasing awareness of the importance of manufacturing in Europe and in the UK, but the cost involves is still prohibited, not everyone can afford a Private White Coat, if you go into M&S or John Lewis and find the Private VC coat for £700 to 1000 pounds, and another one, that is probably not as nice, but performance the same function for £120 pounds – some people will be able to afford 750, and other will not, the world we are living, this is why there is distinction between volume manufacturing and niche manufacturing, in which value is all about buying high volume and selling it cheap, whereas, niche is all about made in UK, getting in store, and creating a story. And the one place niche manufacturing has always been able to sell is Japan, so all throughout this period, even when it wasn't fashionable in the UK, a group of Japanese have always imported a huge amount of British fashion products that were made in the UK, because they want something different and not something made in China, they understand that this is creating job for people and next generation.

INTERVIEWER: And when you mentioned about next generation.... Do you mean they are more patriotic or.....

PARTICIPANT: I think its emotional and patriotic, both, because like I mentioned earlier a lot of them were born here, although you could expect them to be patriotic too, but actually it's the second or third generation that are very product. So I have a lot of Indian, Pakistani and polish, second generation that are absolutely proud and creating jobs, and giving something back and I think it's quite petrifying because they are worse than an average Brit person in buying some cheaply, they have understood that its right to give something back, and I think that... but that is not everybody, there are a lot of people that want something nice and cheap, and there are plenty of crux in the middle, who want to give an impression that everything is made in the UK, whereas it's not. That is not unique to the UK as well. For example, when I am talking to my Italian counterparts, they don't like it when it says [Unclear] ... everybody knows that there is a whole bunch of stuff that is made in Italy, Albania or Romania, a bit like my store 20 years ago. There hasn't been many stories or wasn't until fairly recently, huge amount of control, about where these things were being made... although, there is more control now, especially with the Italians and French, and they are very hot on that issue. If you go into France, Gruissan airport with a fake Louis Vuitton, there is a change that the custom will stop you, and if they think its fake they have the legal power to destroy it. What they do it or not is another matter. In Italy it's exactly the same, not tends to be fashion goods, but rather about the accessories, because the Italians are more into fashion than the accessories [Unclear]. but, there are plenty of Moroccans people walking up and down the beaches in the northern Italy, selling clear coats for 150 Euros. They are clearly fake or cabbage. Cabbage is when you go to the factory usually in China and ask them to make 100 suits for Burberry and they make 120. They 100 are sent to Burberry and the other 20 are sold to these people. So it's real but it's not authorized. I don't know why it's called cabbage, and because, as I mentioned earlier, there is high street value and there is niche, and then there is a the lot in the middle, and then there are also the luxury brands, luxury brands are also fairly quick in trying to increase their margin by making "Luxury products" in cheap countries. The cost of the garment is becoming less, because they are spending a lot more on the promotional and advertising, then they were on actually making the stuff. So, there was a lot of that, but the luxury companies, some of them are trying to bring it back, because they feel like they have gone too far, and a lot of them a lot get really irritated by cabbage, because they will send labels, buttons, threads, and based on how many specs they want, but they will still find a way of doing it. So cabbage is an issue.

INTERVIEWER: So for example brand pulls out Italian fabric, but they still have a recognition of a British brand.. why and what is the importance of origin?

PARTICIPANT: Well, no body needs another hand bag or product, or etc. the purchase is extremely emotional. So if we go back to our parents, they bought a shirt if they needed one, and didn't buy another one unless they were very wealthy. They probably didn't buy another one unless the product was looking remarkably shabby or something. Not sure what your family is like, but family certainly wasn't wealthy. Now days, you can – again it goes back to how fashion got cheaper, and cheaper, where you can go to ZARA, buy something, wear it twice and throw it away.

It's almost cheaper than dry cleaning it, which is obscene and perverse. But, increase it is an emotional thing, where people will think I will buy something has Italian or English on it. Or I am going to buy something that feels Italian, and UK has been very open to that, very open to new ideas, exotics ideas. But UK itself has not been good in supporting its own, so around 5, 6 years ago it suddenly gave up. The economy went into a mess, and we all got into a mess to buy cheap stuff. Then having to compete with the Turks that are not an hour away, kind of copying how the Italians work, doing it better and cheaper than the Italian, and the quality is the same. Yes, we talk about the merchandise made in the UK is better.. it can be, but does not necessarily have to be.. I have seen very exclusive stuff made out of China, and I have seen some very shoddy items made in the UK, and all points in between. So my major market *Japan*, if something is made in China, the Japanese will be expected to pay £50 to £100 pounds. If I is made in the Europe then they will be excepted to make £200 to £300. They will still be expected to be made in the same quality; it's just where it is made that's different. They won't want to find little bits of cotton, they will still the same amount of stitches in one side of the garment and want to put zips on the other, so it's not just the expectation of the quality, it's about patriotism to certain degree, emotional – but I think emotion is really quite strong.

INTERVIEWER: Would you say it's emotional from industry perspective as well?

PARTICIPANT: Brands are creating an image, so they play on the emotions of the consumers, creating a mythology. So if someone is going to Asia, they first thing they have to do is create a methodology. So what is the brand, is it Ted Baker, where they have a fictional character called ted, on what he thinks. So if I was to go and ask people what they think about TED Baker, they would start talking about it as if it was some kind of human, and what likes, colour, quality, free time, ethical manufacturing and how do we know that? Because some very clever people have put together a brand mythology, and the same happens for the retailers. They are judged on their statements, so M&S – Recycling policy, which is a very unpopular move, charging people 5pence every time they buy something, which drives them insane, but I understand that, as if you go in and someone, what you think about M&S.. They would say, well it's very ethical with recycling. Because consumers confuse recycling with ethical, all of these things get opted [Unclear] 45:39.08 together. so people will assume that even though they charge 5pence for a bag, that M&S is still the most ethical brand in the market, because this is how they feel in the pocket. It's not to say that Waitrose is any less, but the mythology is that they are responsible, and therefore, they are good people to work with, and that, if they are into recycling, changes are that consumer will think that they probably pay their people well, they probably look after their staff and their labour, and that is the mythology they develop.

And to be fair, M&S and John Lewis, both have had fairly high profile of bringing it back in the store. They have UK manufacturer alternatives, but they are very expensive. You might buy a £700, or £800 pound suit, but a person that buys £700 service may not get that service. So it's not been a great experience, but they have created a mythology. And it's not that they are, i know that M&S and John Lewis are part of an organization, and they passionately believing bringing manufacturing back to the UK. But there is still contemn with the fact that the person that buys an £800 on a suit, it's a big lead to get to 800.

INTERVIEWER: And you mentioned about creating ethical mythology, do you think that has an impact on the nations equity.

PARTICIPANT: I think it adds on to the dialogue, it's all part of the conversation. I think the issue with ethical fashion side of thing is different, because if you look at the trade show scene now, there is virtually no ethical fashion shows, expect for Germany. This is because consumers don't tend to go to a shop because it is ethically produced. They tend to buy it because they like it, it fits them, they can afford it and their bum doesn't look too big in it, and if it is ethically produced, then well done, but that is not the main reason why people buy things. And there are different elements to it, so there is ethical associated with social corporate responsibility. For example, there may be people that will say, no you shouldn't buy anything at Bangladesh. You may then say, "But Why". And they will sa, because "well, they get paid nothing". But they, #1) son has inherited the farm, but what is number #2) going to do to put food on the table?! Yes, he may be sleeping under a sewing machine, but he needs to earn the money.. But consumers don't see any of that, so that whole ethical fashion is very complicated, and often gets overly simplified. I am a big fan of, I don't know if you are familiar with the fashion revolution campaign,

it's made on the anniversary of Rana Plaza and it's basically fitting the idea of who made my clothes. So you pick a jacket, turn it inside out, show the label and say hack it, for example, I would say "Hack it" who made my jacket. Some manufacturers would say here is a photograph of John based in Birmingham, and he is making your jacket. There are other people that did not get a response. I did not get a response from hack it, but hopefully I will next year, because I will do it again.

But, that there were I think 140, 000 followings on the YouTube link on social media, which became a huge thing.

INTERVIEWER: You have talked about TED Baker, and how consumers associated it a personality, but then a lot of manufacturers moved into retailing, what are your views on that?

PARTICIPANT: A lot of them, that didn't, didn't survive. So there is an element of natural selection. If you look back 25 years, for example, some of the major M&S suppliers, most of them didn't survive. This in particular was, when M&S moved its manufacturing overseas. But some did, because they didn't have a design, as M&S designed, and they didn't have a brand. so if I look back at brands that we have worked with 25 years, then they tend to be brands as opposed to manufacturers, and that is where private white is interested, like John Smedley, because they have understood that in order to work, it's the brand, yes they do some more own brand for other people, but it's their own brand that gives them an autonomy. I think the brand is important, and it's the factory brands that do quite nicely, and have survived. There is also, I know we don't often talk about this in the UK, but we have luxury brands like EMS (Unclear) and Burberry, that have substantial amount of their collections in Scotland, England and Wales. But those factories are not allowed to talk about who their factories are, so you don't see that. So there are a lot of elements to that as well. So they would be regarded as manufacturers and brands, because they are involved in both.

Appendix 2: Template

Key Informants			<u>The UK Fashion Industry</u>	Fast fashion retailers Design-led retailers Wholesale brands / Manufacturers Garment suppliers Component suppliers Textile Researchers Textile and Fashion Consultancies
Perception	Country of Origin	2.1. Place of manufacture	2.1.1. Made in 2.1.2. Historical Reference 2.1.3. Importance	2.1.1.1. Legal definition 2.1.1.2. Labelling – Not compulsory in the UK 2.1.1.3. Labelling compulsory in the US 2.1.1.4. Majority production is held overseas 2.1.2.1. Started in the US after world War 2 2.1.3.1. Not important legally in the UK 2.1.3.2. Direct to customer 2.1.3.3. UK customer does not care
Impact			2.1.4. Country of Manufacturing – Overseas 2.1.5. Challenges with Overseas production 2.1.6. Country of Manufacturing – Home or proximity production 2.1.7. Challenges with home production	2.1.4.1. Quality of the product – country expertise 2.1.4.2. Labour cost 2.1.4.3. Material cost 2.2.5.1. Climate Issues 2.2.5.2. Cultural and language issues 2.1.6.1. Delivery Impact – Fast Fashion <ul style="list-style-type: none"> • Lead-time • Quick turnover 2.1.6.2. Branding Context – <ul style="list-style-type: none"> • Unique Selling point • Internationally effective • 5% customers care • Brand reputation (Media influence) 2.1.7.1. Lack of machines 2.1.7.2. Lack of handcrafted skills 2.1.7.3. Labour in 60's 2.1.7.4. Lack of space 2.1.7.5. Rental prices are very

				high
	Country of design	2.2. Place where the product is designed		<p>2.2.1.1 Mostly designed in the UK</p> <ul style="list-style-type: none"> Reflects the product performance. <p>2.2.1.2. Home design connotation Important for some design-led brands</p> <p>2.2.1.3. Associated with, and important for the designers of the fashion brands</p> <ul style="list-style-type: none"> Control over product design and product function Associated with COO definition. <p>2.2.1.4. Impacts the country image</p> <p>2.2.1.5. Impacts the brand image</p> <p>2.2.1.6. Not used as a promotional tool, apart from detail for some [limited] design-led retail brands:</p> <ul style="list-style-type: none"> On their websites (e.g. Hobbs) Sometimes on the fabric prints (Tartan with Scottish heritage) If associated with Swiss lace
	Country of parts	2.3. Material, Zips and trims	<p>2.3.1. Sourcing</p> <p>2.3.2. Challenges</p> <p>2.3.3. Branding</p>	<p>2.3.1.1. Sourcing association</p> <p>2.3.1.2. Quality evaluation</p> <p>2.3.1.3. Country expertise</p> <p>2.3.2. 1. Climate issue – impacts cotton growth</p> <p>2.3.2.2. Costing issues</p> <p>2.3.3.1. Retailers</p> <ul style="list-style-type: none"> Promote if associated with reputable country image Promote via customer service <p>2.3.3.2. Wholesale Brands</p> <ul style="list-style-type: none"> Associated with brand heritage Associated with reputable country image Promoted via label and heritage

				information
	Country of brand origin	Where the brand was born	<p>2.4.1. Importance</p> <p>2.4.2. Visual Association</p> <p>2.4.3. Consumers attitude</p>	<p>2.4.1.1. Relevant to all brands</p> <p>2.4.1.2. Heritage importance</p> <ul style="list-style-type: none"> • Where the brand was born • Implication of where the owner was born <p>2.4.1.3. Associated to core brand values – premium reference</p> <p>2.4.2.1. Brand name</p> <ul style="list-style-type: none"> • Retailers <ul style="list-style-type: none"> ○ Sub-brand name • Wholesale brands <ul style="list-style-type: none"> ○ The company's name <p>2.4.2.2. Colour association</p> <ul style="list-style-type: none"> • Retailers <ul style="list-style-type: none"> ○ Does not have colour association • Wholesale and Design-led-brands <ul style="list-style-type: none"> ○ Use colour association (e.g. green with Scottish) ○ Use colour to discard the country association (Grey with vintage, British) <p>2.4.2.3. Labelling / Logo's</p> <ul style="list-style-type: none"> • Union Jack • Location (e.g. South Sheild) <p>2.4.3.1. Consumers attitude vary on their interests</p> <p>2.4.3.2. Consumers care about style and design more than brand origin</p>

<p><u>Context</u></p>	<p><u>3.1. Retail branding and wholesale brands</u></p>	<p><u>3.1.1. Definition</u></p>	<p><u>3.1.1.1. Retail Branding:</u></p> <ul style="list-style-type: none"> • Brands owned by retailers • Named under the retailers name • Merchandises own brand label • Mass merchandise 	<p>3.1.1.2 Wholesale brands:</p> <ul style="list-style-type: none"> • Owned by manufacturers or suppliers • Sold in a third party distribution centre • Strong brand recognition • Promising product quality
		<p><u>Blurring</u></p>	<p>3.1.1.3. Retail formats</p> <p><u>3.1.2. Marketing Attributes</u></p> <p><u>3.1.3. Consumers</u></p> <p><u>3.1.4. Benefits of wholesale branding</u></p> <p><u>3.1.5. Manufacturing and Globalisation</u></p>	<ul style="list-style-type: none"> • Wholesale via pure-play retailers –Global research • Via Department stores – Develop brand recognition • Own retail store <ul style="list-style-type: none"> ○ Mass range ○ Rents are high in the UK <p>3.1.2.1. Sale Assistant Behaviour and Attitude– target orientated</p> <ul style="list-style-type: none"> • Visual merchandise • Location orientated <p>3.1.2.3. Product range –</p> <ul style="list-style-type: none"> • location • target orientated <p>3.1.2.4. Collaborative Event Marketing – target orientated</p> <ul style="list-style-type: none"> • Use of foreign celebrities • Use of English celebrities <p>3.1.2.5. Increasing investment in advertisement</p> <p>3.1.3.1. Reach wider audience</p> <p>3.1.3.2. Aiming to become a global brand – by not using COB</p> <p>3.1.3.3. Associated with British consumption habits</p> <p>3.1.3.4. Fitting and sizing experience</p> <p>3.1.4.1. Rents paid by commission</p> <p>3.1.4.2. Less investment in</p>

				<p>training staff</p> <p>3.1.4.3. Global research</p> <p>3.1.5.1. Global production shift</p> <p>3.1.5.2. International competition</p> <p>3.1.5.3.Low production cost</p> <p>3.1.5.4.Low transportation cost</p>
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