Fashion Dynamics Researc. Unit:
A Study of Male Fashion

Research Report No. 5

Progress to Date

The views expressed in this report are solely those of the author as endorsed by the Fashion Dynamics Research Unit. They in no way reflect the views of the School of Management or any other body connected with this project.

Progress to Date:
a status report on
the Male Fashion Study

6th June 1973

David F. Midgley

This report was specially prepared for circulation
to all those organisations taking part in the project

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Summary

This document represents a progress report on the first two years of the male fashion study, detailing both practical aspects and the research team's present thinking on the subject. It outlines the evolution of the original fashion diffusion hypothesis into the hypothesis of "parallel diffusion", a conceptualization thought to more adequately describe consumer and market behaviour in this field. Section 2 contains a discussion of the relevant literature, Section 3 describes the results of some small scale consumer research and Section 4 advance sthe new research hypothesis. Section 5 sketches out the projected development of the research in the future.

Introduction: The State of the Project

In the October of 1972 the Fashion Dynamics Research Unit was transferred from the University of Bradford Management Centre to the Cranfield School of Management. Naturally the disruption of leaving one institution and setting up at another has had quite a severe effect on the progress of this particular project. Originally we envisaged that three months would be sufficient to overcome any problems and that by Christmas the operation would be running smoothly again. Here it appears we were unduly optimistic, the time required being nearer 9 months.

The most severe problems encountered have concerned the analysis of sales data. As of last September the analysis scheme had been worked out and preliminary programs arranged, but in terms of the Bradford computer system. The author has had to learn how to use the Cranfield computer system and it is only in the last 3 months that things have begun to pick up on this front. The various programs are now either debugged, or tested and fully operational, and it is intended to code and store all the data by September at the latest. The analysis of this data will commence as soon as the first batch is on the computer. The overall task should therefore be completed by January 1974. It is intended that the next research report will detail the computer programs and the method of analysis in considerable detail.

On the subject of research reports it will be apparent that this is the first such report since our transfer. This was a deliberate strategy since we soon realised that in order to complete the main aims of the project by June 1974, we should have to reduce its scope to some extent at least.

It was therefore decided to reduce the number of the envisaged reports and to push back the forecast circulation dates. The consequent reduction in executive workload has greatly facilitated the establishment of the project at Cranfield but we would like to apologise for the consequent lack of information on the progress of the research.

In effect this present report contains condensed extracts of some of the reports we had intended to produce. Section 2 contains a discussion of the literature thought relevant to this subject and replaces the original Report No. 6. Section 3 on the pilot consumer surveys replaces the original Report No. 9. Reports 6 & 7, respectively a study on the boutique industry and one on design trends, have been postponed due to the failure of the students concerned to complete their course. We hope to finish these tasks somewhat later but,given the different nature of student teaching at Cranfield. it will be necessary to devise another method for this. The remainder of this report replaces Reports 5 and 11. The introduction giving a summary of the state of the project, Section 4 outlining our present conceptualisation of the menswear consumer market and Section 5 briefly outlining the future development of the project.

A revised list of the titles and tentative circulation dates for our future reports is given in the Appendix. This list also gives some indication of the structure of the remainder of the project.

Turning to the other areas of research it will be noted that the consumer survey has also been delayed. Partly this has been caused by the transfer; but more importantly because with resources for only one survey, and given the seasonality of the market, great care has to be exercised in the timing of the fieldwork. At the moment we feel that late September/early October is the best compromise, but we are currently obtaining more views on this.

Finally, the research on technological innovations and their effect on the garment industry/clothing consumer has been held in abeyance while the person concerned gains experience in another area. This should not cause more than marginal delays in the project as the required inputs will be available in adequate time to incorporate in the final findings.

To conclude on a more optimistic note, we consider that the project is now operating efficiently and we are reasonably confident of completing at least 75% of our objectives by June 1974. At that juncture a report on all practical managerial aspects, and our recommendations for improved techniques, will be circulated. A final, and more academic, report will follow almost immediately after that.

David F. Midgley

David F. Midgley
6th June 1973

Section 1. Research Objectives (A Repetition)

The chief objective of the research programme is to gain a fuller understanding of consumer behaviour in the menswear market - an understanding which can be used to design short-term forecasting techniques. In gaining this understanding it is hoped to produce a considerable body of knowledge relating to the male fashion area; an area where there appears to be a dearth of literature and previous research. Before discussing some of this extant knowledge it is first necessary to define more precisely what is meant by "short-term forecasting techniques". In effect the phrase means the forecasting, for each season, of the retail unit sales of the styles marketed by a particular organisation. Thus the techniques are concerned with what Midgley and Wills (1)* have termed short-term variations and have managerial implications for immediate problems such as production scheduling and stock-holding. As was detailed in Research Report No. 2 this is the area perceived by management as giving rise to the greatest number of problems. However, short-term variations cannot be viewed in isolation: there are medium and longer term trends affecting both the basic technology of garment-making and the society in which clothing is worn. Such trends have a profound effect on the context and framework within which short-term forecasting operates, though it is not a necessary corrollary that the forecasting techniques themselves will need to change. Depending on the technique used, this itself may mirror and project alterations in the basic structure of society. Having said that, it is hoped that over longer periods of time more knowledge and experience will be systematised and forecasting techniques will become more sophisticated.

The orientation to the above aspects does mean, however, that the primary concern of the research is with the retail market and with retail organisations. Obviously though, research at this level has implications for the garment manufacturer, cloth producer, and so on. Equally obvious is that the practical aspects of the research must take account of this production chain, eg. it would be of little use devising forecasting methods which do not give early enough warning of the need to increase or cut-back on production. Without going into great detail the forecasting techniques envisaged are those combining market research information with analyses of sales trends, and requiring executive judgments. In essence a distillation of the best managerial practice in the industry at present.

* The References cited are given on page 24

That then is the context for the project, it follows quite logically that the research needed is also a combination both of investigations into consumer behaviour in the market place, and of studies of past sales trends. Nevertheless the project did not build from scratch, from the commencement it has proceeded along almost classical scientific lines. That is to say that no "a priori" reasons were seen for consumer behaviour in the fashion market being inherently different to that in other markets. Instead it was decided to use an extant theory - the diffusion of innovations - as a starting point. The prime reason for this choice, at least in the beginning, lay in the literature. The theory of the diffusion of innovations has been applied to fashion previously, indeed many of the early studies in this tradition used new fashions as a product category - see Katz and Lazarsfeld(3), King (4), etc. However, the past studies were almost entirely concerned with women's fashions not men's, hence there was only circumstantial evidence for this approach. Nonetheless, there seemed no evidence to the contrary, i.e. that male behaviour towards fashion was significantly different from female, and the theory seemed to form an excellent starting point. At this point it is perhaps useful to outline the literature in this area before attempting to relate diffusion theory to the particular market. In so outlining previous research and speculation it should be re-emphasised that this predomonantly concerns women's fashions.

Section 2. The Background Literature

A useful starting point is Wills and Christopher (5) which presents a fairly adequate overview of the various themes running through fashion research. Of these there appear to be three main ones. The first being mostly speculative and journalistic, representing experience in the area but not any attempts at systematic analysis. Amongst these are the works of Beaton (6), Dior (7), Laver (8, 9) and Robinson (10). While providing a useful background, such works are too vague and ill-defined to form any useful structure for further research. They, and their ilk, are certainly only of marginal interest in relation to the aims of the project being discussed here.

The second major theme is concerned with the study of style dimensions, and the search for recurrent cycles in these dimensions. Among the most well known of these are the works of Kroeber and Richardson (11), Young (12) and Carman (13). In this research tradition the style variables available to designers (width of skirt, length of skirt, waist width etc) are plotted with the aim of discovering regular patterns. As such some patterns appeared to exist, at least up until the 1930's, with regular oscillations in the relevant dimensions. Whilst obviously of great interest these studies appear to have some methodological drawbacks. Being based on fashion plates, photographs and paintings they detail little about what the mass of the population were wearing at any one point in time. In fact, they tend to describe only a small upper class section of society. Also the cycle hypothesis seems to break down after about 1935 - see Carman (13). A variety of reasons have been advanced for this breakdown, the more germane being those connected with the growth of the technological society. Yet another drawback is the fact that such studies explain little, they merely describe the results of an unknown process. This second theme of the literature was also, therefore, viewed as not being of particular relevance to the men's outerwear project; primarily as it offered no explanation of the underlying process but equally since it concentrated on style aspects. The relationship between style and demand is a complex one, and a relationship which has been inadequately investigated in the literature. On the one part there is the constant creativity of the designers who produce a wide variety of new designs each season, and on the other there are the actual sales in the retail outlets. It seems plausible to assume that only some styles are eventually adopted by the majority of the population. Therefore, it appears to the author that it is insufficient to treat style alone or, indeed, to treat demand in isolation. There is a complex feedback relationship between the two, a relationship which it is hoped this paper will conceptualise in some more adequate way. Now obviously with regard to clothing design there are only a limited number of alterable product dimensions, a fact in itself which may lead to regular periodicity in styles. There, indeed may be some evidence for the hypothesis of Allen (14) who suggested that designs evolve along a certain line until the physical limits of their style dimensions are reached. The evolutionary line of

development is then broken and there follows a period of confusion and revolution before a new design direction evolves. As evidence of this Allen cites both the "New Look" and the mini skirt, which became more and more abbreviated until its dimensions could be reduced no further. At that point a radical break occurred and eventually the midi skirt emerged. The author, while not entirely disagreeing with this thesis, would argue for a demand component in the process. Thus the mini only developed because the consumer had accepted the original concept, and likewise the midi could not diffuse until the public would accept the new concept. Indeed there was a prolonged hiatus while designers attempted several new lines; and in particular the midi, before the latter was eventually adopted.

Hence research into design, and design cycles, does not appear to be anything more than a part of the answer. On the practical side Carman (13) has shown that cycle theory was never a useful forecasting tool, being entirely inaccurate. He suggested that modern society was in the event too complex for such simplistic arguments and what was needed was an explanation in terms of the adoption and diffusion of fashions.

Thus, the theory of the diffusion of innovations is seen as the only theory at present which offers some explanation of the dynamics of the fashion process, and of the interaction between designers and consumers. This, of course, is the third theme running through fashion literature. Further, in many senses, perhaps fashion literature should be viewed as a subset of diffusion literature as a whole. The chief justification for classing fashion as a separate field of knowledge would appear to be in the greater development of ideas on design, creativity and organisational innovativeness; ideas which have only recently begun to be explored in the diffusion tradition - See Knight (15). However, those investigations in the fashion diffusion area closely mirror those in the remainder of the diffusion tradition, that is they are predominantly concerned with innovators and opinion leaders amongst the consumers.

Nystrom (16) is the first person worthy of attention since he was probably the originator of the concept of fashion diffusion, though he himself acknowledges a debt to Veblen. As is by now well known, Nystrom advanced the theory that new fashion "trickled down" from the higher social classes to the rest. While this may no longer be the case, as suggested by King (17), the main aspects of Nystrom's work remain in present theory. There is insufficient space here to outline diffusion in general, this is more than adequately performed by Rogers and Shoemaker (18) and by Robertson (19). Instead only the recent works of relevance will be quoted.

Concerning women's fashions one of the most recent studies, Summers (20), is by far the most impressive in the fashion diffusion tradition, and is worthy of more detailed discussion. Using data from another survey, King and Summers (21), he analysed the characteristics of opinion leaders with the overall aim of devising techniques for identifying such leaders. Opinion leadership was measured by a modification of the now almost standard scale - see Rogers and Carteno (22) - and information collected on a demographic, sociological and psychological variables. The sample size was 1000.

On the demographic variables opinion leaders were found to be (i) younger, (ii) more educated, (iii) of higher income groups, and (iv) of higher occupational status. These results are in line with diffusion theory as a whole and Rogers and Shoemaker's generalisations (18).

On sociological characteristics; Summers found that cosmopolitanism, measured by mobility, and gregariousness, measured by social participation, were the most important variables. Again this is in accordance with theory.

On personality and attitude characteristics it was found that attitudes and values were more powerful predictors than personality factors. However, the particularly pronounced tendencies were for leaders to be more exhibitionist than their followers. For visual product such as clothing this might be expected. Further Summers found that leaders only received higher exposure to one type of media, ie fashion magazines, radio and television apparently having little effect. Opinion leaders were found also to be more involved in fashion than their followers, all scoring high on venturesomeness and receiving fashion information. This last point appears to be of some importance; opinion leaders were found to be frequently recipients of information (verbal) as well as transmitters of it, implying a more equal role between leaders and followers than previously thought. All the above results will be returned to later in this report, in the context of some pilot studies conducted within the research project (See Section 3). What can be concluded from Summers' results is that fashion diffusion,at least for women's fashion, is similar to the diffusion of innovations in general. The only differences apparent being, as Robertson (19) has pointed out, the visual nature of clothing and the fact that the fashion adoption curves, while similar to the pattern for other products, are of shorter durations.

If attention is now turned to men's fashion then the past literature and research appears very scant indeed. To the author's knowledge the only study of note in the diffusion tradition is the recent one by Darden and Reynolds (22). These authors followed along the lines outlined by King and Summers (21), and Summers (20),with the aim of examining how well selected characteristics predicted "male clothing fashion opinion leaders". Regrettably the sample sizes were somewhat smaller than in the

previously mentioned works but this fact does not invalidate all their conclusions. In the final analysis two variables appeared to be consistent predictors of opinion leadership across a wide range of social groups. These factors were "fashion venturesomeness" and "fashion interest", a result in concurrence with those of Summers (20) in the female fashion area. However, other variables produced less explainable results and hence while of considerable interest this study does not provide a rationale for male fashion behaviour in general. Nevertheless it does provide some indications that male fashion diffusion is not inherently different from the women's case, or from the diffusion of innovations in general. This it will be remembered was the hypothesis adopted at the start of the particular research being discussed here.

The above has demonstrated that while suggestions exist to the effect that male fashion behaviour is similar to that behaviour systematised by diffusion theory, there is insufficient evidence to accept this hypotheses readily. It was, therefore, decided to substantiate or reject the theory by gathering evidence on a wide scale.

It will be remembered from the previous reports that three possible methods of collecting the requisite evidence were identified; (i) to ask senior executives to describe both the fashion process and the composition of their companies' markets, (ii) to analyse sales data for fashion adoption curves and (iii) to survey consumers both along traditional diffusion theory lines and with respect to other ill-documented aspects of fashion behaviour.

The first of these three tasks has, of course, been completed and is described in its entirety in Research Report No. 2. To reiterate the main conclusion of that report this was that the picture emerging from the comments of senior executives was reasonably consistent with diffusion theory.

The survey of industry practice therefore provided some evidence that the research hypothesis was viable, certainly not systematic or conclusive evidence but enough to encourage further development along the lines mentioned previously.

A start has also been made on both the other tasks. The consumer studies are discussed in the next section and the analysis of sales data mentioned in Section 5.

To conclude both the background literature and the preliminary research, while suggesting that the research line is tenable, provide insufficient evidence on which to construct accurate predictive techniques. Further evidence is needed on consumer behaviour and it is to this topic that we now turn.

Section 3. Pilot Consumer Surveys

It will be remembered that provision for a major survey of male clothing purchasers had been built into the research plan (see Report No. 4.) However, before attempting to conduct such a survey on a major scale, it was thought prudent to carry out some pilot studies. While the methodologies for measuring opinion leadership, innovativeness, etc., are fairly well established, it was hoped to collect evidence on a wider range than this. It turns out that market research in this field tends only to be done by fibre producers who are, naturally enough, not particularly concerned with fashion or, indeed, the purchase process. Thus it was also thought necessary to investigate factors such as deliberate versus impulse purchasing, extent of information search, purchase dimensions, excetera. With the lack of previous surveys on such aspects it would have been unwise to proceed without first testing the methodology. Therefore, three pilot studies were carried out in the summer of last year with the aim of determining the best methodology, and also of generating some information on the relevant dimensions.

All three studies were conducted by means of a quota sample of 100 questionnaire-based in-street interviews. While such samples are obviously too small to analyse in great detail some of the stronger trends to emerge from them are of interest and relate back to the literature. All three also used common demographic questions to allow some degree of overlap between the areas explored. These latter were (i) the characteristics of innovativeness (ii) interpersonal communication and (iii) purchase behaviour.

The study on the characteristics of innovativeness, reported in Langdell (23), sought to establish whether the traditional tenets of diffusion theory held in this market. In the context of a short interview in the street it proved impossible to administer any sophisticated measures of innovativeness. Instead a simple measure was utilized consisting of the interviewer classifying the respondent by appearance. The retail outlet of the respondent's last purchase was also established. The former appears to be a good measure and one capable of development. At any one moment several distinct styles, of differing age, exist and it is possible to categorise respondents into such types. The next stage of sophistication here would be to ask the respondent to identify "his" style from a set of design drawings. It is hoped that this will be attempted at the next phase of the research. Asking for a retail outlet is not a good measure of innovativeness as, boutiques apart, most organisations sell a variety of styles. Here again it might be possible to ask respondents to identify their last "style" amongst drawings of several styles. Evidence was also collected with respect to several other areas.

For example, despite the small sample there was a discernable connection between income and social class, and the number of garments* owned. The higher the respondent's rating on these two variables the more clothes he was likely to own. A similar relationship also held for those who were more interested in fashion.

On the analysis by type of retail outlet one or two items of interest emerged. As would be expected there was a close relationship between type of outlet and appearance classification, the two are measures of the same phenomena. However, what is of interest is not only that boutique customers were predominantly the young (15-25) but also they were those most interested in fashion.

The appearance rating bore the expected relationship to age, the younger tending to be the more innovative. There was no easily discernable relationship between income and appearance but, paradoxically, there was between appearance and social class. For example 80% of those rated conventional** were C2DE's while 60% of those in the "modern conventional" category were ABC1's. The"trend conscious" or most fashionable category gave ambivalent results, probably because of the sample size. It does appear likely, however, that age is a more powerful indicator of this latter category. The more innovative also seemed to be those with a higher degree of cosmopolitanism (measured by reading habits and current awareness***). This result is, of course, entirely in accordance with previous work in other areas. Lastly, and in line with the analysis by retail outlet, there was some relationship between innovativeness and interest in the subject.

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* The survey concerned suits, jackets, trousers and knitwear. However, in the total sample of 300 only 11 had purchased knitwear recently so this was dropped from the analysis.

** The three categories were conventional, modern conventional and trend conscious.

*** The measurement of cosmopolitanism by social mobility was disappointing. As yet no firm reason has been advanced for this but it is suspected that occupational mobility may be a better indication than type of house owned (or rented) over a period of years.

Taking the second study, by Benson (24), this concerned interpersonal communication and personal influence. Again, with the constraints of the interviewing situation no rigorous measure of opinion leadership was applied, in fact a simplified version of the sociometric method was employed (25). In discussing the sources of information 27% of the sample mentioned discussions with either wives or girlfriends. This was an expected result, given the high credibility of family sources, but is somewhat lower than the figure of 51% quoted by King (26) relating to female fashion communication. Indeed on the whole this study suggests that verbal communication is lower than in other areas. Whether this is a result of the sample size or in fact the actual case remains to be seen in the future. Of those who had discussed their purchase around half reached a decision as a result of this discussion. The communications themselves were predominantly about style, material and colour, surprisingly enough not about retail outlets.

If, however, the 71 respondents who did not discuss their purchase are now examined in more detail it appears that 12 became aware of the purchase idea through interpersonal communication and 19 through visual communication. Viewing the sample as a whole the most important source of information appears to be verbal communication (30%), followed by previous purchases (20%) with visual communications third (19%). Advertising and shop display appear not to be important sources of information.

Taking opinion leadership, 18% of the sample had been asked for their opinion on menswear during the month proceeding the survey. Though naturally too small a sample to be significant, it is interesting that 42% of these were in the AB social class category. If this result holds for larger samples it will be in agreement with the diffusion theory as a whole. "Leaders" also tended to be concentrated within the younger age groups, a result consistent with that of Summers (20). Looking at communication dyads these were predominantly between those of the same social class and age group. This, of course, is consistent with King's "trickle-across" hypothesis (17) rather than Nystron's "trickle-down" one(16).

However, all the above has been on a somewhat minute sample, the one trend which did emerge strongly from this pilot study was the communication of unfavourable attitudes. Only 10% of the sample would never tell their friends of an unfavourable experience with regard to a garment, or dissatisfaction with regard to a retailer. Conversely 74% would always tell their social contacts of such an occurrence. Such communications are not about aspects of the purchase such as style or colour, rather they concern poor workmanship, inferior materials or inadequate service from sales staff. Perhaps a reasonable working hypothesis is that, as the theory of cognitive dissonance would suggest (27), the former variables relate to the respondent's personality and emotional commitment to the garment. The latter factors are, however, ones over which a purchaser has no control and to which he has no commitment. Hence, men feel able to communicate adversely on these factors.

Lastly, the sample were asked where they would obtain information if they were contemplating a purchase. The results were that 22% mentioned sales personnel, 21% friends and 50% said they would "shop around". The last comment is in direct contrast to reality, as is demonstrated by Proctor (28) in the third and final pilot study.

Nearly 40% had purchased on impulse, and while as a rule impulse purchasing correlated with the expenditure involved it was still prevalent for expensive items such as suits. Factors which do appear, at least superficially, to affect such behaviour are price cuts and particularly distinctive styles, colours and displays. Price offers are not important with regard to planned purchases (those planned up to 2 months ahead). However, even despite lengthy planning little information* was sought prior to the cash transaction. Over 80% of the sample sought little or no information and considered few alternative retail outlets. Proctor concluded "many purchases are made in a state of ignorance, or at least indifference" (28 p. 98).

However, 29% of the sample discussed prospective purchases with their wife or girlfriend, a figure in close agreement with the 27% reported in Benson (24). Thus family discussion occurs but what seems to be the process is that while discussions of style, colour and material occur they do not also touch on retail outlet. Once committed to a purchase, men seek little information on where to make it and visit only one or two shops before reaching a decision. This would appear to be in direct contrast to the women's market where it is usual to consider all or most of the alternative sources of supply, and their offerings, before making a purchase. It may be that women define their purchase more specifically before shopping, whereas men go out to buy "a grey suit". What men do define is a price range but on other dimensions their ideas are relatively undeveloped.

To conclude this section on a note of caution, it should not be thought that any of the above results are regarded as conclusive, or advanced as facts. The sample sizes and methodologies used preclude any such judgments. No doubt future research will reject many of the above conclusions, but what the pilot studies have shown is that treating the male garment as a specific example of the diffusion of innovations is a valid research direction to follow. In short the pilots provide encouragement to continue along the lines outlined previously. These studies have also suggested the best methods for a planned future survey. This latter

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*From advertisements, friends or from visiting retail outlets

research, however, will not use the same methodology. It now appears that to gain the relevant information something in the order of a one-hour in-home interview is needed. Given that the pilot studies demonstrate that a sample in the region of 1000 is necessary for significant sub-cells, such a technique obviously requires greater resources and gives rise to more practical problems than in-street interviews. To suggest such a departure was one of the reasons for carrying out the pilots and they have, therefore,fulfilled their objectives. In the major study it is hoped not only to develop the measures discussed before but also to include the standard scales for innovativeness and opinion leadership. Much more research of this nature is needed before the diffusion hypothesis can be accepted in full.

Nevertheless, all the preceeding literature and research begins to suggest a model for the fashion processes in this market, one based on the diffusion theory but incorporating modifications to account for the specific differences of the market and retail structure. In the next section an attempt will be made to outline the dynamics of the male fashion market as the author views them at this point in time.

Section 4 A Possible Hypothesis for the Dynamics of the Fashion Process in the Menswear Market

The hypothesis advanced here is one of what might be termed "parallel diffusion". That is to say that an innovation in this market diffuses simultaneously throughout both the consumer population and the retail organisations. Further, due to the many feedback and control mechanisms this parallel diffusion in both systems is kept in step one with the other. Thus as a widespread adoption reaches a particular category of consumers it also reaches the retail outlets serving this category. In order to do so the merchandising executives of the outlets must have planned ahead of the adoption curve, which in turn necessitates the close monitoring of trends earlier in the process. At present such monitoring is by mainly subjective and unsystematic observation of the styles selling in other retail outlets.

Style trends appear to originate amongst the "boutique" sector of the industry. Here the term "boutique" is taken to include the high fashion designers since not only do the actual boutiques copy the designs of these people but they themselves also design for retail chains. It is suspected, though as yet there is little evidence for this, that there is no clear-cut relationship between these two categories. Some new styles may have been originated from high fashion designers and some from boutiques. Whatever the origin of the idea, however, the small boutiques are the first to market new styles to sizeable numbers of people. Hence they are the first stage of the diffusion process. It is tempting to equate the "boutique market" with London, certainly there are more boutiques concentrated in such areas as Carnaby Street, the Kings Road and Kensington High Street than in other cities. Having said that,while provincial boutiques may take their design lead from London,in terms of market and influence they may also have quite a profound effect on consumers throughout the country. The appearance of provincial boutiques, geared to rapidly follow new design trends, may be one reason for the increased rate of fashion change experienced over the past few years. Thus it is better to conceptualise the boutique market as including such provincial outlets and having a wider spread effect than previously thought.

Whence there exists a sector of the menswear industry catering to a small, but still sizeable, proportion of the consumer market and characterised by extreme rapidity of fashion change. This sector is highly fragmented, being comprised of numerous small (usually single) retail outlets. Such organisations produce a constant flow of new design ideas - they are "innovative" organisations in the sense used by Thompson (29).

Whether such ideas evolve from the last seasons styles or represent radical changes of direction is still a matter of some speculation. Again it is suspected that both processes occur concurrently. However, the success of one or another depends on whether the consumers will accept them at that point in time. Thus Allen's hypothesis (14) may be right but possibly for different reasons. Once a large number of consumers have adopted a particular style trend they may accept a certain limited evolution of this trend but will not accept a radical change of direction until either some time has elapsed, or most of the population has adopted it and the style has become "conventional". Therefore, even amongst the innovative members of society there will be limits to the rate of innovation that will be readily accepted.

To recapitulate, so far the picture that emerges is one of great creativity and a high rate of innovation. Obviously, however, only a small number of these new style ideas "catch-on" with the boutique customers. The great majority never last more than one season. Irregularly a new style is adopted and its sales within this market segment begin to grow. Almost simultaneously other boutiques will note the success of the innovator and copy his idea, thus further spreading awareness of the new fashion and prompting greater sales. At which point simultaneously both the early adopters of Rogers' scheme (30),and the merchandise personnel of larger retail organisations, become aware of the trend.

Before further discussing the dynamics of "parallel diffusion" it is as well to devote some space to the characteristics of innovativeness. As is well known Rogers, by means of a normal (or near normal) form of the adoption curve, divided the population into innovators, early adopters, the early majority, the late majority and the laggards. These categories are arbitrary, innovativeness best being viewed as a continuous variable - a point Rogers has re-emphasised in his latest work (18). In examining male fashion behaviour such a large number of categories may obscure the underlying characteristics*, differences between categories perhaps being too slight. Langdell (23) identified three appearance categories; "trend-conscious" roughly corresponding to the innovators, "modern conventional" corresponding to the early adopters/part of the early majority, and "conventional" comprising the remainder of the population.**

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* at least at this early stage

** Langdell also had a fourth category, "disinterested", for those not influenced by the dictates of fashion (in any sense). This proved not to be operationally viable - see 23 p.81

Taking a different slant, and with regard to female fashion, Dupont (31) have attempted to identify "mentality models" for women. By relating psychological characteristics to style types they have segmented the market into six basic feminine types, with associated preferences for clothing falling into six distinct appearance categories. As an aid to marketing this undoubtedly has great value; what is lacking in the model is an expression of the dynamic nature of the fashion process. What the above study strongly suggests is that at any one point in time there may be several disparate fashion innovations diffusing simultaneously. This is a facet which should be incorporated into the model of the menswear market, even though this may be somewhat simpler than the women's. It may also present difficulties in using appearance as a measure of innovation.

Turning back to menswear, another study, also on a semi-psychological basis, has been conducted by the Dutch Institute for Men's Fashions (32). Here four types were identified, and their interest in fashion assessed according to the purpose for which the clothes were purchased ie. for business, relaxing, holidays etc.

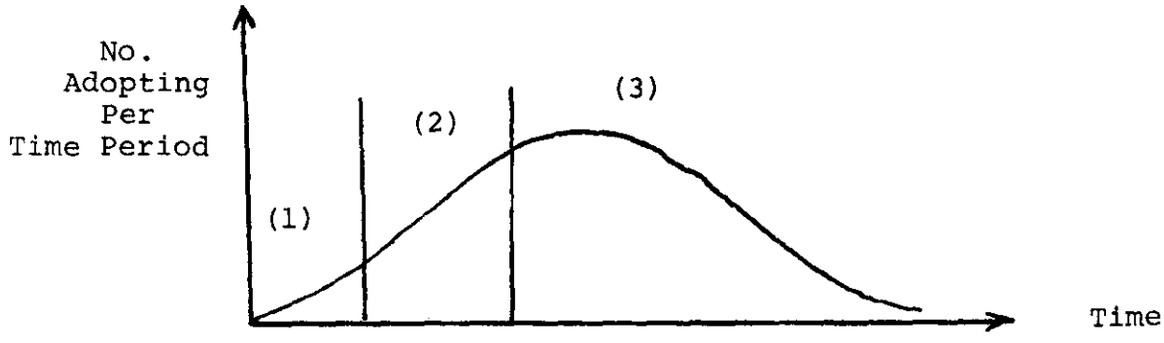
The "unconventionals" were "exuberantly fashionable" - in effect very changeable - and wore a variety of styles. The "young progressives" were also exuberantly fashionable except where business clothing was concerned, where they were slightly more cautious. The "young executives" were actively interested in fashion except for business use where though still up-to-date they were more cautious. The "establishment" category were only moderately interested in fashion.

This whole area obviously needs further research, and research aimed at linking both style types and psychological characteristics to diffusion theory in general. It is intended that the survey mentioned previously, which it is hoped will be conducted this year, will shed some light on this topic.

On the characteristics of consumer types perhaps the most important is age, a conclusion which emerges from both the literature and the pilot studies. Cook (33) concludes that the peak buying age for menswear is 24, whilst Meyer (34) in a study of the French market emphasises the relation of youth to fashion. All of which is eminently plausible if it is accepted that apparel has a role in attracting members of the opposite sex, and also that the young have a greater discretionary income with regard to clothing. However, such global averages hide some parts of the process, not all boutique customers are young and conversely a large percentage of those purchasing "conventional" clothing are under 25.

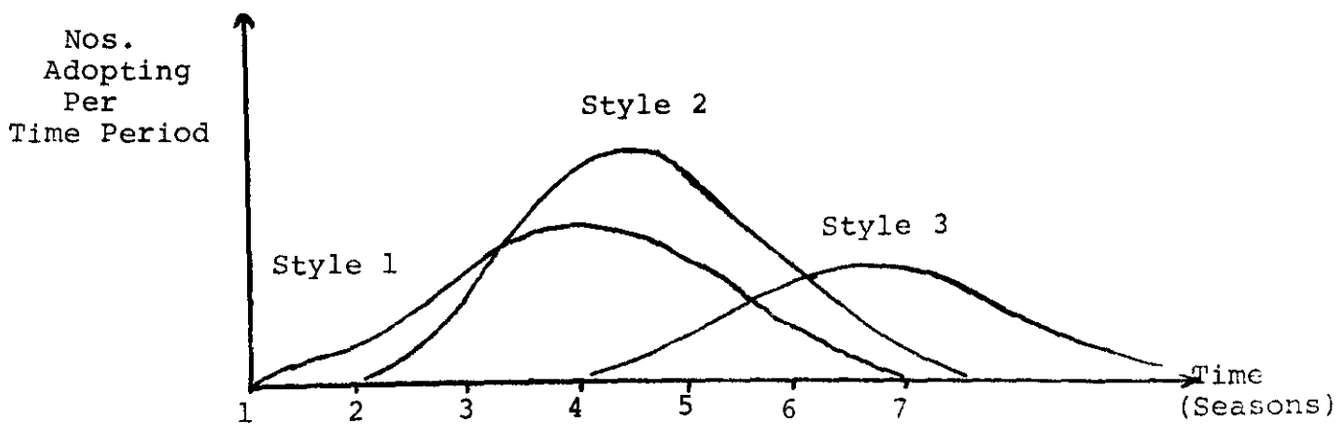
For the sake of illustrating the parallel diffusion process in a simplified manner the population will be split into three. Taking the familiar adoption curve these categories are as shown in Figure 1. The rationale for such a classification is partly simplicity, partly based on Langdell (23) and partly because of the perceived characteristics of retail organisations - though again in a simplified form. Category 1 are the innovators, category 2 the early adopters/early majority and category 3 are the rest.

Figure 1: Consumer Categories



Now moving away from one style innovation and taking a longer period of time the situation is as shown in Figure 2.

Figure 2. Successive Style Innovations

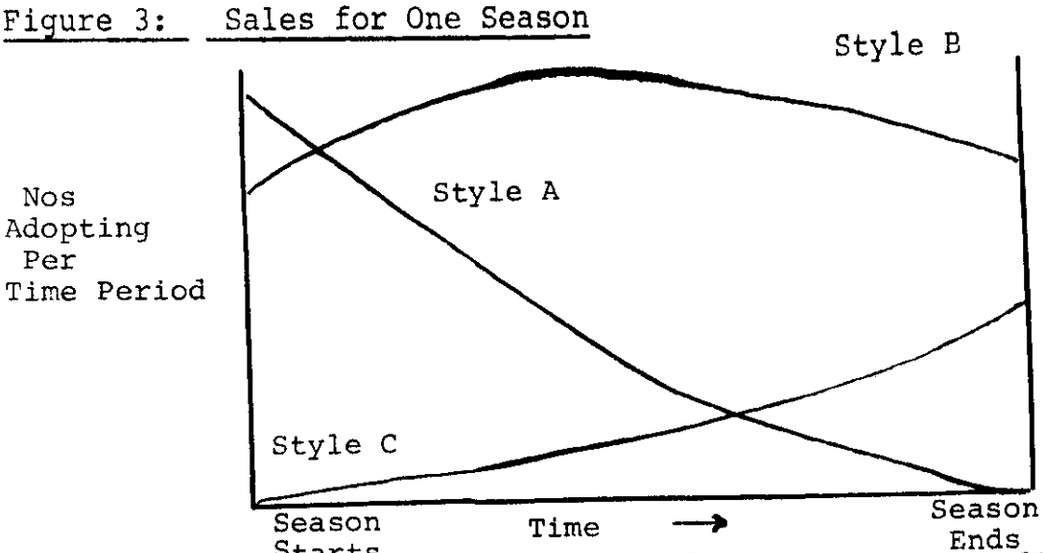


Note that while it is hypothesized that an innovation usually occurs at the commencement of a season (having origins in prior design work for that "new" season's styles) it is not necessary that a distinct new style innovation emerges and "catches-on" every season. In fact several seasons may pass before such an event. Figure 2 is a purely hypothetical situation. Further,

some attempt has been made to illustrate that different innovations have different rates of adoption and hence different maxima and duration. Finally, the situation in Figure 2 describes only one style innovation emerging fron any one season. Again, the situation may be much more complicated than this, with several styles emerging strongly from the boutique market.

Thus, if the sales for one (hypothetical) season were examined the result would, in all probability, resemble Figure 3.

Figure 3: Sales for One Season



Where Style A is the oldest fashion, Style B of intermediate age and Style C a new fashion emerging from the boutique sector. Therefore, the sales resulting in any one season will be a mixture of fashions of differing ages, some on the decline, some static and some gaining in acceptance. Further, as has already been alluded to, different types of retailers cater for consumers of differing innovativeness. In figure 3 Style C, the "newest", would be sold by boutiques to the innovators, whence their"trend-conscious" appearance. Style B would be selling to the early adopters, early and late majority from a combination of the more "fashionable" retail chains and the mass "conventional" retailers. Style A would be sold exclusively by the more conservative mass multiples.

If we look at any one fashion, or style innovation, then as it is adopted,not only is it adopted by different categories of consumers but also it is marketed by different types of retail organisation. Returning to Figure 1, consumers in category 1 purchase from boutiques, those in category 2 from the smaller, more "fashionable" retail chains, and those in category 3 from the larger mass retailers.

This is, of course, where the key difference between the apparel market and other product markets lies. A new type of convenience food or consumer durable is sold from a similar type of outlet throughout its product life cycle. Only in the fashion market do different types of retail outlet cater to different stages in the adoption process.

The second component of the parallel diffusion hypothesis is that of the retailers. As a new style emerges and is adopted by greater and greater proportions of the population then the larger retail organisations must commence production so as to have the "new" style on "their" shop rails as "their" market begins to adopt. To achieve such phasing it is obvious that continuous monitoring of trends occurs. Primarily this is done subjectively by a combination of several techniques, amongst which are: observing what retailers earlier in the innovation chain are selling, noting trends amongst consumers, obtaining early warning of style trends from design exhibitions, and lastly extrapolating the past sales trends of different styles. However, the situation is somewhat more complex than this, for two chief reasons.

Firstly, as a style innovation is adopted by wider numbers of consumers, and differing retail outlets, then it is re-interpreted and modified for later groups in the diffusion process.

Secondly, many fashions may not be adopted by more than a small sector of the population. For instance a new fashion may be extinguished within the early adopter category and thus, while representing a viable product line for the boutiques and smaller retail groups it may never have been sold by larger organisations. For a multiple retail group, often with several hundred branches, a style innovation must be potentially capable of being adopted by large numbers of the population before production capacity can be committed to it. In a sense, therefore, minor "fashions" may be "weeded-out" at an early stage and never marketed to the bulk of the population.

To conclude, the diagrammatic schema thus far is over-simplified since not only are distinct new fashions produced at irregular intervals, but also such fashions gain differing degrees of acceptance among the population as a whole. In the initial stages of the process there is great creativity, tremendous variety and frequent change. From this creative "jungle" trends emerge, some of which are adopted by the mass of the population, and some of which never reach more than a fraction of that number. An inherently simple basic mechanism produces the immensely complex fashion market.

Now to this point the problems of defining fashion have been deliberately ignored. There never has, or in all probability never will be, "a fashion". At any one point in time several distinct, though possibly related, styles exist concurrently.

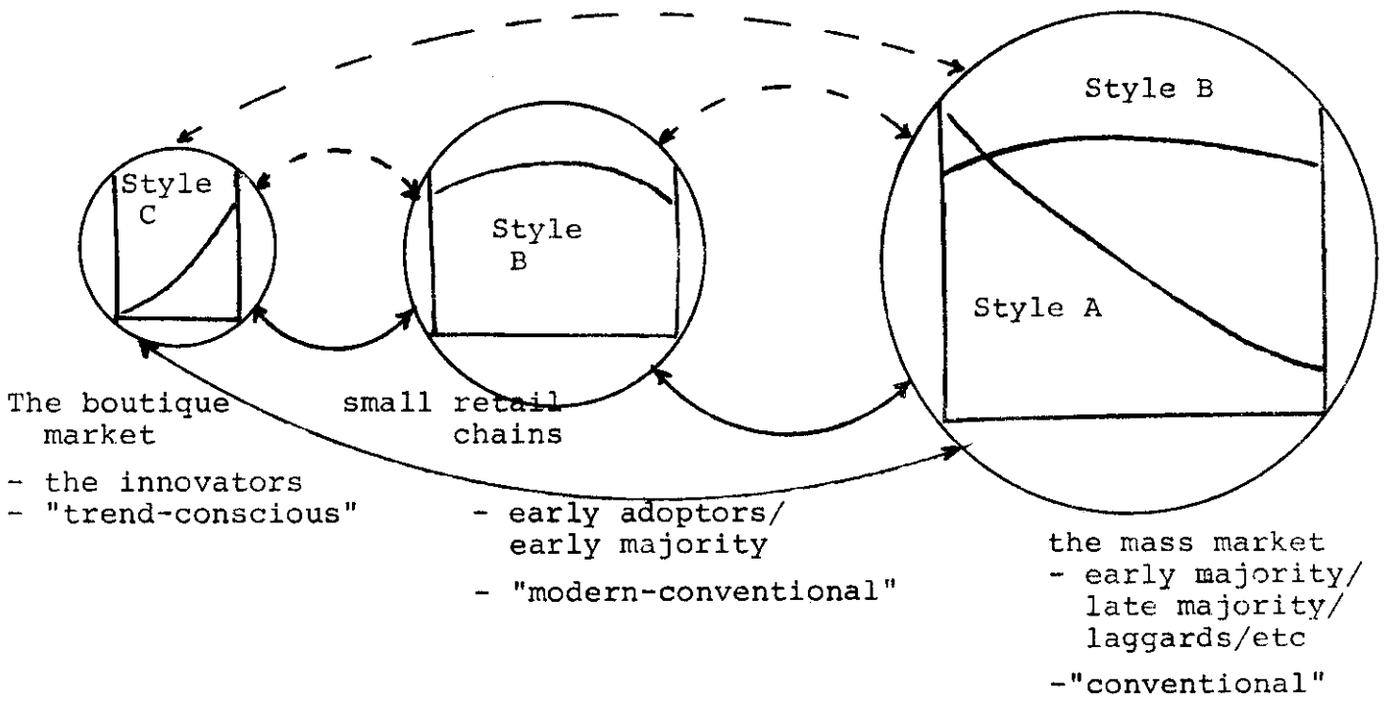
The foregoing has also demonstrated that the definition of fashion is a temporal one, what is perceived as "more fashionable" is, in fact, the "newer"style. To borrow Langdell's terminology (23), the "conventional" of today is the "modern conventional" of last year and the "trend conscious" of the year before. Provided, of course, that due account is taken of design re-interpretation, and also that the time periods quoted may vary. "Fashionable", however, has some social connotations above and beyond this and in order to examine and explain the market in diffusion theory terms it is better to conceptualise the problem as previously. That is that any one season's styles are a mixture of style innovations at different stages in their adoption curve. The term "fashion" is better reserved for more general discussion.

Finally, the crude model developed within this paper is summarised in diagrammatic form by Figure 4. There, by separating out the various style innovations of Figure 3 into their respective market segments, it is possible to outline some of the processes and trends which must occur in any one season.

Figure 4: A Crude Model of the Menswear Market

----- trend monitoring

_____design re-interpretation



It must be reiterated that this diagram is a gross over-simplification. As yet the categories of the various retail groups, and of the consumers utilizing them, have to be firmly established. It is likely that with the advent of boutiques within larger, more conventional, stores the situation may now be less clear-cut. Further, there is little evidence as to both the rate of adoption of style innovations and the number of "successful" innovations at any one time. More work is also needed to establish how, and on what basis, merchandise decisions are made. Clearer evidence on the way designs are re-interpreted for different markets is also required before further progress can be made.

What can be said is that the hypothesis of parallel diffusion, that is the simultaneous organisational and consumer adoption of an innovation, represents a somewhat better picture of the menswear market than any simpler hypothesis. Parallel diffusion then is a better approximation to reality, and one that suggests more fruitful avenues of research in the quest for an explanation of this fascinating phenomena - the fashion market. However, much remains to be investigated before the hypothesis can be advanced with greater certainty.

Section 5. Future Developments

These fall into two main areas. The first of these has already been mentioned i.e. a survey of menswear purchasers. From this it is hoped that a better picture will emerge of both purchase behaviour in general, and the specific dimensions relevant to diffusion theory. With a better definition of types of retail outlets, and a wider range of collected data on this aspect, the survey should also provide a clearer picture of the relation of adopter categories to retail outlet. Refined psychological and appearance questions will allow the investigation of the possibility of "mentality models" for men, and perhaps more importantly the relation of such models to the innovation process. A practical by-product of such a survey may be suggestions for more systematic methods of measuring style trends. Report No. 7 (to be published shortly) will contain a more detailed exposition of the survey methodology envisaged.

However, the above would only be half the story, the main area to be investigated is that of the adoption curve itself. Knowledge is needed to ascertain just what a style innovation is; whether such innovations are specific garments, classes of garments or somewhere between these two extremes. Further, it is necessary to gauge rates of adoption so that the time lags between innovation and widespread acceptance can be estimated. To this end several computer programs have been designed and implemented to analyse data on the sales of nearly 400 garments over the past two to ten years.* There exist some methodological difficulties with the data obtained, but it is hoped that by the end of the year conclusions will have been reached on some of the aspects mentioned above. It is hoped also that the completion of this task will lead naturally to better sales forecasting techniques.

Those then are the two main future directions this research project will take. Among subsidiary tasks are an investigation of the effect of technological innovations (in the manufacture of garments) on the ultimate retail customer. For this see Cantlay (35,36). It is also intended that some small-scale research into the boutique industry will be conducted; with the aim of eliciting information on the rate of innovation, the "success" and"failure" of such innovations, and the origin of design/style ideas.

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* The programs and analysis scheme will be described in Report No.6.

The project is still very much in an embryonic phase; no doubt when it is concluded, in just over a year's time, many of the thoughts outlined will be rejected or modified substantially. Nonetheless, at this point in time, and for menswear at least, it is hoped that the overall picture drawn by this Report is a fair representation of the present state of our knowledge pertaining to innovation in the fashion market.

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APPENDIX

Research Reports

Already Circulated

No. 1.	Research Objectives	October '71
No. 2.	A Preliminary Assessment of Industry Practice	March '72
No. 3.	Technology and Fashion	August '72
No. 4.	Research Plan	March '72
No. 5.	Progress to Date	June '73

To be Circulated

No. 6.	Computer Systems for the Analysis of Sales Data	July '73
No. 7.	Proposed Methodology for a Consumer Survey	August '73
No. 8.	First Analysis of Survey Results	December '73
No. 9.	Conclusions on the Analysis of Sales Data	February '74
No.10.	A Theory of Consumer Behaviour in Clothing Purchase	March '74
No.11.	Management Decision Making: Final Report and Recommendations	June '74
No.12.	Final Report: A Review of the Research Results Obtained	June '74 or later

NB Titles and issue dates may be altered in the light of future experience