Emerging female consumers' use of diagnostic cues in evaluating apparel assortment of South African department stores

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Dissertation

Masters degree in Consumer Sciences: Clothing Retail Management

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by

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DECLARATION

I, Lizét Bezuidenhout declare that this research study is my own work. It is submitted in partial fulfilment of the requirements for the degree Master of Consumer Science: Clothing Retail Management, University of Pretoria. It has not been submitted before for any degree or examination in any other University. I further declare that I have obtained the necessary authorisation and consent to carry out this research.

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SUMMARY

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Emerging markets have generated a lot of interest during the last couple of years; one reason for this is the economic growth potential of emerging markets and the opening up of new, interesting and potentially very lucrative groups of consumers. South Africa has a rich and diverse culture and shows signs of major socio-economic inequalities that are symptomatic of emerging economies. In South-Africa, department stores are significant to the emerging market female consumer market as they provide an extensive assortment of products and services. Department stores also offer a number of product categories and each provide an opportunity for in-depth analysis. Work apparel is one such product category where more research is required in order to understand how these consumers evaluate product assortments. The purpose of this study was to explore and describe how the emerging market female consumer market (EFC) evaluates work wear product assortments in major South African department stores.

The study makes a contribution to the field of retail, marketing and consumer behaviour in terms of a better understanding of the emerging market. It is also valuable in providing insight in consumers' decision making processes towards work wear and preferences towards product assortment. The theoretical approach to the

study included a literature review on the emerging market female consumer in South Africa, the South African retail environment and department stores, product assortment and product attributes. The cue diagnostic framework was used as a theoretical perspective for the study. This consumer-based approach was considered particularly appropriate for this study, in terms of the prioritization by a female consumer in an emerging market of product attributes when she is shopping for work wear and evaluating retailers' product assortments. Combined with the literature review the cue diagnostic framework offered a theoretical basis for the study and provided an overall perspective on the specific phenomenon to be studied.

An exploratory survey research design was employed together with a conjoint analysis method to provide insights into attribute ranking and level of influence of specific attributes. The sample consisted of 120 (n=120) female consumers living and working in Gauteng between the ages of 20 and 60, currently working with some sort of training, diploma or degree. Non-probability sampling methods were used, including purposive and snowball sampling. Respondents completed an online self-administered questionnaire. To ensure an appropriate sample, the online questionnaire was also distributed in paper-based format.

The results of the study indicated that the emerging market female consumer market has set ideas and preferences which appeal to them when purchasing work wear from department stores in South Africa. Certain product attributes were found to be more important than others while some were used in conjunction with other attributes. This combining of attributes helped to strengthen the importance of these attributes in the decision making process. The study adds value, knowledge and insight to the existing literature on consumer preferences in emerging markets and the apparel attributes that inform these preferences. This research will be useful for researchers as well as marketers who are interested in marketing campaigns, product assortment planning and retail settings.

Keywords: emerging market; department stores; apparel; product assortment; conjoint analysis

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1.1   THE SOUTH AFRICAN RETAIL INDUSTRY

The South African retail landscape is currently characterized by its dynamic and changing nature. The opportunities and challenges in the South African retail sector range from changes in consumer behaviour, growth in private labels and market share as well as growth in national retailer share prices (Akinboade, Mokwena & Kinfack, 2008:512). Despite international economic turmoil, the South African retail industry has shown steady and positive growth of approximately 4.9% in the last quarter of 2010 (Buanews, 2010). In the latest report from PWC on the outlook for retailers and consumer products for (2012–2016) in South Africa, the accounting firm stated that they expected retail sales to continue to expand steadily from 2012 to 2016; this will particularly be driven by the emergence of a new black middle class (PWC, 2012:2).

Within the overall South African retail sector, apparel retail forms a key segment. The South African apparel retail sector grew by 4.6% in 2011 to reach a market value of $8,206.2 million (R 60,267.7 million) (Marketline, 2012), which is a significant contribution to the total output of the retail sector. Despite the global economic recession, the South African apparel retail sector has shown reasonable growth since 2008, and it is predicted that this positive growth will continue through to 2016 (Marketline, 2012; Data Monitor, 2009:3). The positive performance of this sector is forecast to produce an anticipated compound annual growth rate of 4.1% for the period 2011 to 2016, which is expected to drive the industry to a value of $10,053.7 million by the end of 2016. In 2011 the women's wear segment was the most profitable, with a total revenue of $4,298.4 million, equivalent to 52.4% of the industry's overall value, and this was followed by the men's wear ($2,172 million) and children's wear ($1,739 million) segments that also contributed to the industry's aggregate value (Marketline, 2012).

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Contributing to the growth of the South African retail sector is the growth of the emerging middle class in South Africa. Since 1994, it is not only South Africa as a country that has gone through dramatic changes; the South African consumer population has also undergone radical changes due to the rise of a new emerging market consumer (Akinboade *et al.*, 2008:512). These changes were predominantly the result of pressure in the political and economic environment. Political and social changes in South Africa in the last 20 years have changed the target market for retailers. The pre-1994 political policies that had separated racial groups were removed in an instant, merging the fragmented groups together and forming a new population (Bruyn & Freathy, 2011:538). Among the country's diverse inhabitants were members of several principal ethnic groups: Zulu, Xhosa, Sotho, Tswana, Venda, Ndebele, Tsonga, Swazi, Pedi, Coloured, Afrikaner, English and Indian (Goldschmidt, 2003:204). Although the implementation of the new policies after the first democratic election in 1994 has had a substantial influence on the country's multi-cultural marketing and consumer spending environment (Leibold & Hugo-Burrows, 1997:67), retailers were not always ready to deal with the complexities associated with multi-ethnic and diverse target markets.

1.2   SOUTH AFRICA AS AN EMERGING MARKET

South African society is characterized not only by diverse cultures but also by major socio-economic inequality. The post-apartheid era has seen income changes and a varied distribution between consumer segments within South Africa (The Coca-Cola Retailing Research Council, 2010). On one side of the divide there is a well-established industrialized economy, but on the other there is a marginal economy based on subsistence production in traditional rural areas (Schlemmer & Moller, 1997:15). Although South Africa has been classified by the World Bank as an upper-middle-income country, by international standards it is estimated that South Africa has some of the highest inequality levels in terms of income groups (Neff, 2007:313). In the years following the 1994 elections, the income share of 20% of South Arica's poorest people was not much lower than the income of people in what were defined as upper-middle-income groups. A large portion of the population thus belongs to the middle-income group. Yet, as is typical of most African countries, a distinct gap has

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appeared between the large middle-income-group and the very wealthy (Schlemmer & Moller, 1997:25). The newly emerging middle class in South Africa is matched by a large number of unemployed people living on the poverty line (PWC, 2012:2).

In addition to the above, more contemporary views expressed by Klemz, Boshoff and Mazibuko (2006:591) and Worden (2012:2), describe South Africa as having a dual economy, with a division between business sectors and urban areas on one side, and townships and rural areas on the other. It is believed that the earnings of the top 10% of the earners in the country are 101 times those of the bottom 10% of inhabitants in South Africa (PWC, 2012:5).

This is characteristic of an emerging market context where the retail sector typically consists of a combination of fragmented and organized markets. Fragmented markets are mostly associated with traditional, local marketplaces that have unique product offerings. In these fragmented markets, prices are negotiated between the vendor and the consumer, and availability and assortment is limited. In contrast to the fragmented markets, organized markets are mostly situated in urban areas and comprise structured malls and stores which specialize in specific product categories or include multiple departments. Prices are fixed, and there is greater assortment and more availability of products in store (The Coca-Cola Retailing Research Council, 2010:11). These organized markets are of particular interest in the South African emerging context, as they offer several challenges for catering for the needs of a diverse consumer population.

Research interest in the emerging markets has escalated over the past few years based on the economic growth potential of these markets and their accompanying high share of the global population (Burgess & Steenkamp, 2006; Essoussi & Merunka, 2007). These markets are often described in terms of their accelerated expansion with regard to social, economic and business activity (The Coca-Cola Retailing Research Council, 2010:11), but it is difficult to find a universal definition of what constitutes an emerging market (Herstein & Jaffe, 2007:14). Several country categorization schemes exist, but if we use the comprehensive yet practical classification of Burgess and Steenkamp (2006), which incorporates gross domestic product (GDP) per capita at purchasing power parity, emerging markets include the

transition economies of the former Soviet Union, the Eastern Bloc and Asia and the developing countries of Africa, Asia, the Middle East and Latin America.

South Africa, which is classified as an emerging retail market (The Coca-Cola Retailing Research Council, 2010), has a retail landscape that differs greatly from that of high income, industrialized countries. Yet, as in the case of these more advanced economies, consumers in an emerging market such as South Africa have a huge impact on the retail sector and its product offerings. Coinciding with an increase in the availability of products due to globalization and worldwide investment, production, marketing and distribution (Essoussi & Merunka, 2007), consumer buying behaviour is constantly changing and control is being shifted from retailers to consumers (Kim, Sullivan & Forney, 2007:27). In an emerging market, retailing is greatly dependent on consumer patronage as this is often the determining factor for the success of a retailer.

Clothing expenditure in South Africa had reached a robust R29.57billion in 2011, and was expected to increase with 14.7% over the 2012–2016 period (PWC, 2012:27). The major money spenders in South Africa are female, and their spending power is considered to be crucial for the existence of retail industries worldwide (Huddleston & Minahan, 2011:1). Female earnings are expected to reach a high of $18 trillion worldwide by 2014. It is not just their earning power that makes women such an interesting topic; female consumers also control $20 trillion in spending power, and this figure is expected to rise to $28 trillion in 2014 (Huddleston & Minahan, 2011:1). There is an acknowledgement that men are becoming more comfortable in the retail sector, especially within the fashion, health and beauty departments, and that this is particularly true of men who are categorized as belonging to Generations X and Y, yet it is still the female consumer who reigns supreme in the retail sector and who often directly influences the purchase decision-making of male shoppers and her household members (Huddleston & Minahan, 2011:2). For the purposes of this research, female consumers will be targeted as they are such key players and have such an influence within the South African apparel retail sector.

1.3 DEPARTMENT STORES CATERING FOR THE SOUTH AFRICAN EMERGING MARKET

Department stores originated in the mid-nineteenth century and are still a very popular concept in the retail sector today (Diamond & Litt, 2009:6). Department stores offer a wide assortment of merchandise, from hard goods to soft goods, displaying their products in a structured and categorized manner. Many speciality areas and different product categories (e.g. apparel, accessories, shoes, furniture, and home accessories) are combined in full-line or specialised department stores (Diamond, 2006:7-8; Diamond & Litt, 2009:6). A department store can be defined as a store that contains a large number of departments, and that generally has more than 25 employees (Dransfield & Needham, 2005:48). The key element of a department store is that it is divided into several departments, providing a large range of shopping opportunities for the shopper and enabling him or her to find all the goods he or she wants under one roof (Dransfield & Needham, 2005:48).

Department stores are significant to the consumer because they provide an extensive assortment of products and services; these products and services are categorized into departments for convenient purchasing, and the store has added customer services. This range of activities often makes a department store the anchor store within a community (Berman & Evans, 1995; Thang and Tan, 2003). By the end of the twentieth century, department stores had grown to have an enormous variety of internal departments ranging from linens to haberdashery, making a department store a complex organizational form (Jeacle, 2004:1165). The South African retail scene is dominated by small number of department stores and consumer good companies (PWC, 2012:3). These include stores like Edgars, Woolworths, Stuttafords, Ackermans, and PEP. Although Ackermans and PEP base their branding on discount prices and solutions, they are still considered comparable department stores within the South African retail sector.

Department stores in emerging markets face a number of unique challenges because of the socio-economic environment in which they compete. These challenges include consumers' limited knowledge of organized retailing (such as department stores), as their prior experience might have been limited to the acquisition of goods in

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traditional markets (The Coca-Cola Retailing Research Council, 2010). Furthermore, complex consumption patterns reflective of cultural diversity among South African consumers (Bruyn & Freathy, 2011:541) are forcing department stores to adapt their product offerings to cater for these differences.

As consumers grow accustomed to a wider variety and availability of products, patronage becomes increasingly important for the continued growth of department stores (The Coca-Cola Retailing Research Council, 2010). An understanding of patronage behaviour is a critical issue for retail managers, as it enables them to identify and target those consumers who are most likely to purchase products from their stores (Pan & Zinkham, 2006:229). One very well-known department store group, Edcon, has shown significant success and growth in this regard. In late 2006, Edcon was described as one of the largest non-food department stores in the South African sector, having over 900 stores in South Africa (Talmor & Vasvari, 2011:488). In order to tap into new consumer markets and to focus on customer loyalty, Edcon offered its customers financial services and credit card facilities through its own internal finance department. Many of Edcon's four million customers, who could not obtain credit through banks or traditional means, jumped at the opportunity to gain credit in alternative ways (Talmor & Vasvari, 2011:488). This added service quickly gave Edcon a competitive edge over other department stores, and contributed to the growth of the group.

In addition to the initiatives mentioned above, the product assortment offered by a retailer is particularly important, and has an enormous impact on sales (Kok, Fisher & Vaidyanathan, 2009:9), and ultimately on customer patronage and brand loyalty (Amine & Cadenat, 2003:487). Previous research has focused on the variety of products available to consumers, and on how much variety is actually demanded by consumers (Stablein, Holweg & Miemczyk, 2011:350). Another subject that has been discussed in previous research is how large the product assortment in retail stores should be (Boyd & Bahn, 2009:288). Limited research has been conducted on how the product assortment is evaluated in an emerging market.

Assortment planning ranks high on the priority list of retailers, and is used as a strategy to attract and ensure repeat store visits from consumers. Assortment planning is the process conducted by retailers to establish the quantity, variety and

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kind of products to carry in their stores or include in the ranges offered (Rajaram, 2001:187). Consumers' perceptions of product assortments depend on the availability and product changes that are presented to them on a frequent basis (Bruce & Daly, 2006:329). Consumers favour variety because they are more likely to find a product they want if there are more options to choose from (Hoch, Bradlow & Wansink, 1999:527). Variety gives the consumer a multitude of options to select from, and increases the probability that he or she will find the right product. It also lowers the possibility of the consumer buying an alternative product from another store. To stay competitive and retain customers, retailers need to revise their product assortment on a regular basis. When changing products in a store on a regular basis, a retailer introduces more variety and offers the consumer a larger product assortment. Introducing a larger product assortment is, however, costly, and retail organizations therefore need to assess their customers' individual needs carefully instead of catering for a mass group within the market (Lloyd, 2004:62). Certain main factors are vital when retailers revise their assortments. These key factors include seasonal changes, new and innovative products that need to be introduced into the market and transformations in consumers' tastes (Kok *et al.*, 2009:99).

1.4 APPAREL PRODUCT ASSORTMENT

Apparel is one product category where a better understanding is required of how consumers, specifically specialized target markets, evaluate product assortment; this will enable retailers to gain the full benefit and profits from their assortments. Apparel is deemed as a necessity in the lives of many consumers (Holmlund, Hagman & Polsa, 2011:109), and in order to make a profit, retailers must supply products that are appropriate to their target market. Consumer satisfaction with apparel product departments is considered an essential goal, and consumers are willing to allocate some of their monthly income to apparel products to maximize their satisfaction and improve their shopping experience (Chen-Yu, Williams & Kincade, 1999:167). Previous research suggests that consumers are prone to experience feelings of negativity when shopping for clothing in department stores, since this type of product category causes more dissatisfaction than any other amongst consumers when they cannot find the right product (Kincade, Giddings & Chen-Yu, 1998; Huefner & Hunt,

1992; Engel & Blackwell, 1982). In this regard, consumers' taste preferences fulfil an important role in decision-making specifically for hedonic products such as high fashion apparel (Hoyer & Stockburger-Sauer, 2011:167).

Product attributes play a crucial role when consumers consider and evaluate the product assortments of retailers. Purohit and Srivastava (2001:124) argue that the manner in which consumers use an attribute and incorporate or combine it in their final evaluation may depend on the significance of the attribute. Connolly and Srivastava (1995:220) differentiate between two types of attributes, namely cues and components. Cues are the product characteristics used as a baseline for evaluation; cues therefore convey information about the intensity of the valued characteristic. Essentially, cues are pieces of information used by the consumer to evaluate an apparel product (Connolly & Srivastava, 1995:220). Components illustrate the consumer's preferences with regard to different diagnostic values about the attributes of a product (Connolly & Srivastava, 1995:220). For the purpose of this research study we will mainly focus on the cues (pieces of information) used by consumers when evaluating a product assortment.

The literature further suggests that attributes can be analysed from a micro and a macro point of view. Abraham and Littrel (1995:66) classified attributes into four dimensions, namely physical appearance, performance, the expressive dimension and the extrinsic dimension; these dimensions relate to a micro viewpoint. The more common macro viewpoint classifies attributes into intrinsic and extrinsic attributes, as exemplified in the empirical findings of Veale and Quester (2009). Intrinsic cues are product attributes that are intrinsic to the actual product; should this attribute change the product itself will be changed as well (Veale & Quester, 2009:195). An apparel product usually has intrinsic attributes such as colour, style and size. These attributes cannot be changed without altering the product itself or changing its look and feel. Extrinsic attributes are aspects that are related to the product but are not physically a part of it, such as name brands, price, and country of origin. Extrinsic attributes can thus refer to any product characteristic that can be changed without changing the use or core of the specific product (Veale & Quester, 2009:195).

The pertinence of product attributes in consumers' evaluation of a product and, more specifically, of a retailer's product assortment, has initiated some research into the

topic in more developed contexts. Yet limited research has focused on this subject matter in emerging markets such as South Africa that are characterized by heterogeneous consumer populations and other unique complexities.

1.5   JUSTIFICATION FOR THE STUDY

As worldwide populations become increasingly diverse across countries and cultures, researchers strive to understand how social contexts and individual consumer characteristics influence buying behaviour and marketing efforts (Grier & Deshande, 2001:216). Consumers often make swift assessments of a product assortment to determine if it is worthwhile to pursue the examination further. Diagnostic cues play a vital role in these assessments and can reduce the decision-making costs incurred by the consumer. By identifying the cues that are important to the target market and focusing on these cues, the retailer will simplify the decision-making process for the consumer (Herpen & Pieters, 2007:77). Under this assumption it is evident that there is an opportunity to initiate research and gain a better understanding of the attributes used by consumers in an emerging market to evaluate apparel product assortments; these attributes in turn influence their perceptions of the retailer and their patronage behaviour. Studies considering the impact of the product assortment on the likelihood of store choice or patronage remain relatively few compared to the number of studies related to price, brand and location (Amine & Cadenat, 2003:486). One potential reason for this limitation is that much of the existing work examines the effect of different product cues on quality perceptions in isolation, whereas most quality assessments are made in the presence of multiple product attribute cues that are incorporated into assortments (Purohit & Srivastava, 2001:123).

Apparel products, in particular, may be subject to the simultaneous assessment of multiple product attributes. When dealing with product assortment evaluations or product choice, it is likely that the evaluation of a product and also of a product assortment is based on many attributes of the same entity (Connolly & Srivastava, 1995:219). Limited research has been conducted to determine how various apparel attributes rank against each other, in order to determine the most important attribute in the decision-making process of consumers, particularly those consumers who

reside in emerging markets. This study contributes to the body of existing knowledge by providing an insight into the evaluation by a female consumer in an emerging market of apparel product assortments, and by determining the most important attributes that contribute to the decision-making process. The findings of this study should assist marketers and retailers to gain a better understanding of the decision-making processes of female consumers in the emerging market of South Africa, of how these consumers approach purchases relating to work wear and their preferences in terms of product assortments. Ultimately, an understanding of the attributes that rank most prominently in consumers' evaluation of product assortments could assist retailers to refine their offerings and gain more patronage.

Retail patronage describes whether or not a consumer will return to a department store or shop and spend money after a retail experience (Chetthamrongchai & Davies, 2000:84). It also includes whether the consumer is willing to recommend that family or friends should make purchases at a specific store (Baker, Grewall & Parasuraman. 2002:329), which in turn will create patronage towards the store. From a retailer's perspective the most important thing a shopper should experience from a purchase situation is satisfaction with the product and the purchasing process. This should also be true for the consumer: when a consumer is satisfied with the product options in a department store, he or she will remain loyal and will patronize the department store frequently.

Limited research has been conducted in the analysis of product assortments in the retail sector in South Africa, and even less focus has been placed on consumers in the emerging markets. The manner in which product assortments are compiled may have a significant impact on the profit efficiency of department stores, and therefore a large gap exists in the research, especially with regard to the assortment preferences of the consumer in the emerging markets. The shift in the needs, income, wants and preferences of consumers in the emerging markets can have a major impact on how they view retailers' apparel product offerings in department stores. For the purpose of this study, work wear was selected as the specific product category to be explored, since female consumers often use work clothing to reflect their personalities. Work wear is also chosen based on its appropriateness for a particular social role, and the female consumer will often use this type of clothing to submerge the aspects of herself that are not pertinent to the office environment (Woodward, 2007:55). In summary, the decision-making process for selecting and evaluating work wear is very

complex, and limited research has been conducted on this topic as well, which provides further impetus for the study.

1.6   RESEARCH PROBLEM

The female consumer in an emerging market, with her newfound spending power, has a voice to demand credit and the right product assortment and the right to be acknowledged as a perceptive and individual consumer with specific product needs (Olivier, 2007:180). Retailers need timely and appropriate information that describes the typical behaviour and preferences of consumers within these new demographic segments (Moore & Carpenter, 2008:323). Research conducted in more developed countries indicates that consumers patronize a particular store for the following attributes: price, product assortment, location, apparent product quality and customer loyalty (Amine & Cadenat, 2003:487). It was also established that the weight of each factor may vary in different buying situations, indicating that certain attributes may be more important to some market groups than to others (Amine & Cadenat, 2003:487). To date, empirical findings regarding the above factors, and more specifically the significance of product assortments, remains limited within the emerging market context, and little is known about the preferences of female consumer groups in emerging markets. It is very important that retailers stay up to date regarding buying behaviour in emerging markets, to ensure that the correct and most up-to-date product assortment is readily available for all female emerging market consumers.

A vast amount of literature describes the effects of product attributes on consumers' evaluation processes (Fiore & Damhorst, 1992; Richardson, Dick & Jain, 1994, Hugo & Van Aardt, 2012), Research in this area continues and is extremely important, because retailers need to ensure that their marketing strategies and product assortments are in line with the attributes that are most valued by their consumers when making purchase decisions (Veale & Quester, 2009:195). However, the importance and value of product attributes in the evaluation by consumers in emerging markets of retailers' product assortments is still unfamiliar territory. This gap is especially wide in the apparel retail sector, in which the women's wear segment is considered the most prominent in terms of contribution and growth

(Datamonitor, 2009). Working women spend the majority of their week in work apparel; this category is therefore seen as important in women's wear departments. By focusing on the correct cues, apparel retailers can reduce the risk of carrying incorrect fashion lines/ranges and of over-stocking, both of which mean they have to sell products at a margin lower than they wished. This study therefore aims to investigate the diagnostic cues used by the female consumer in an emerging market to evaluate the work wear product assortment of major department stores in South Africa. This will enable marketers and retailers to adapt and revolutionize their product assortment to ensure customer satisfaction and retail patronage within an apparel store on a consistent basis.

The following research question was formulated for this study:

Which diagnostic cues does the female consumer in an emerging market use to evaluate work wear product assortments in major South African department stores?

1.7   OBJECTIVES OF THE STUDY

The overall objective of this study is to explore and describe the relative importance of diagnostic cues used by female consumers in an emerging market to evaluate apparel product assortment in South African department stores.

The specific objectives of the present study are:

- To explore and describe the relative importance of intrinsic cues (style, colour, and size) and dual cues (fashionability and quality) used by female consumers in an emerging market in their evaluation of department stores' work wear apparel product assortments.

- To explore and describe the relative importance of extrinsic cues (brand, price, store image and country of origin) and dual cues (fashionability and quality) used by female consumers in an emerging market in their evaluation of department stores' work wear apparel product assortments.

- To determine the priority ranking of specific identified diagnostic cues used by female consumers in an emerging market to evaluate the work wear product assortment in department stores.

1.8 CONJOINT ANALYSIS

Although it has been argued that there is no definitive retailing model that can be used to measure shopping behaviour in emerging markets (The Coca-Cola Retailing Research Council, 2010), a method which was identified as being particularly beneficial in addressing the objectives of this study is choice modelling and conjoint analysis. Through these techniques the analysis of consumer evaluations of different combinations of product attributes is possible (Mazzocchi, 2008:347). Conjoint analysis is a research technique often used by marketers to identify the features that products being introduced to the market should have, as well as how these products should be priced (Curry, 1996:2). These techniques have been used as early as the mid-1970s, where they were described as a concrete set of approaches for predicting consumer preferences for a wide variety of products and services with multi-attribute options (Green & Srinivasan, 1978:103; Hair, Black, Babin, Anderson & Tatham, 2006). The main premises underlying conjoint analysis are, first, that consumers' choice behaviour is governed by an intensification of preferences, and, second, that products are viewed not independently but as part of a bundle of attributes from which consumers gain value (Carson, Louviere, Anderson, Arabie, Bunch, Hensher, Johnson, Kuhfeld, Steinberg, Swait, Timmermans & Wiley, 1994; Hensher, 1994). A multitude of applications of conjoint analysis have been implemented over the last three decades to develop and present explanations of alternative products while using models to interpret attribute levels (Green, Krieger & Wind, 2001:56). Conjoint analysis is also used to interpret the importance of different attributes of a product assortment and to determine how decisions of consumers are likely to be influenced by the inclusion or exclusion of a specific product (Bucker, 2010:98).

Various methods of constructing conjoint tasks and estimating the resulting conjoint models have been developed in recent years, especially since the introduction of software programs that facilitate the entire process (Hair *et al.*, 2006). For this

specific study, a conjoint value analysis full profile method seemed particularly appropriate, as it requires respondent evaluations of hypothetical product assortments that are described in terms of specific attributes and levels (Sawtooth Software©, 1997-2002).The initial step in this approach is the compilation of a choice set as depicted in Table 1.1. This choice set contains specific factors/attributes, and levels within those factors, that may be considered by a female consumer in an emerging market when evaluating a work wear product assortment in a department store. The factors depicted in Table 1.1 represent intrinsic and extrinsic attributes that constitute utility for an apparel product assortment and include style, colour, size, price, brand, quality, store image and store name. Each factor may be defined in terms of specific levels, so, for example, style can be described as classic, trendy, tailored, casual or a combination of these levels. By using the Sawtooth Software©, profiles are created which combine all of the attributes, each at a different level (as illustrated in Table 1.1), and these are then presented to the respondents in a conjoint task. The specific presentation method chosen for the conjoint task in this study is the pairwise comparison technique (Hair *et al.*, 2006), whereby respondents are asked to compare two profiles and to indicate their preference for one profile over the other on a rating scale. A further in-depth discussion of the application and use of this technique is presented in Chapter 4.

TABLE 1.1: LEVELS OF ATTRIBUTES SHOWN IN A CHOICE SET ADAPTED FROM EGGERS (2009)

ATTRIBUTE	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5	LEVEL 6	COMBINATION
Style	Classic Styles	Trendy Styles	Tailored Styles	Variety of Styles	Casual Styles		Variety of Styles
Colour	Neutral Colours	Bright Colours	Seasonal Colours	Muted Pastel Colours	Earth Tones		Seasonal Colours
Size	Standard and petite sizes	Standard and plus sizes	Standard sizes	Standard, Plus and petite sizes	LEVEL		Standard, Plus and petite sizes
Price	Low to Moderate prices	Moderate to expensive prices	Expensive to very expensive prices				Low to Moderate prices
Brand	In store and designer Brands	Designer Brands	In store brands				Designer Brands
Quality	Easy Care	Well made	Durable				Durable
Store Image	Discount	Convenience	Exclusive	Quality	Value oriented	Fashionable	Quality
Store name	Edgars	Woolworths	Truworths	Ackermans	Pep	Stuttafords	Edgars

1.9   DEFINITION OF TERMS

Definitions of important concepts and terms used throughout the study are given below for the sake of comprehensiveness and to increase the theoretical validity of the study.

Emerging market: An emerging market can be described as having a developing market economy with a low to medium income per capita; emerging market countries are usually in a process of economic development and transformation (Singh, 2010:1).

Department store: A department store can be defined as a large retail establishment with an extensive assortment, in variety and range, of goods, organized into separate departments. All departments are housed under the same roof to facilitate buying, customer service, merchandising and control (Business Dictionary, 2012).

Consumer behaviour: This 'reflects the totality of consumers' decisions with respect to the acquisition, consumption and disposition of goods, services, activities, experiences, people and ideas by decision making units' (Hoyer & Macinnis, 2007:3).

Product assortment: This is the process whereby a retailer decides which products will be in the store, the quantity that will be in the store and the variety it will offer to the target market (Ray, 2010:58).

Attributes: These are the dimensions of a product that describe the product (Abraham & Littrel, 1995:66)

Diagnostic Cues: Diagnostic cues are the product characteristics used as a baseline for evaluation (Connolly & Srivastava, 1995:220).

Intrinsic cues: These are product attributes that are intrinsic to the actual product; if an intrinsic cue changes, the product itself will be changed as well (Veale & Quester, 2009:195).

Extrinsic cues: These are product characteristics that can be changed without changing the use or core of the specific product (Veale & Quester, 2009:195).

1.10 PRESENTATION AND OUTLINE OF THE STUDY

Chapter 1 sets the context for the study by providing a detailed and comprehensive discussion about the nature and background of the research topic. Important elements of the chapter include the justification for the research, the research statement, and the overall objective of the study. Finally this chapter gives an outline of the remaining chapters and summarises their content.

Chapter 2 contains a comprehensive review of the literature relevant to the research topic. The literature review mainly addresses the cues and components that consumers use to evaluate the product assortment within a department store. A more in-depth discussion is presented on the intrinsic and extrinsic factors of a product assortment. Intrinsic factors include aspects such as style, size and colour, whereas extrinsic factors comprise elements such as price, brand, country of origin and store image. Lastly dual attributes will be discussed; these will include fashionability and quality. The chapter concludes with a discussion of the implications of the above-mentioned factors in relation to the focus of this study.

Chapter 3 discusses the theoretical perspective adopted for this study. The cue diagnostic framework of Slovic and Lichtenstein (1971) has been chosen as the theoretical perspective for the study. The perspective is discussed and justified in terms of its suitability for the current study. The assumptions of the perspective are presented, in addition to the implications of the theoretical perspective for the study. The conceptual model and objectives are also outlined in this chapter.

Chapter 4 covers the research methodology employed for this study. The justification and description of the research elements that were used, such as the design, purpose and approach, are delineated. The chapter also explains the development of the instrument and the operationalization of the objectives, and describes the sample, sampling, and data collection methods used. The use of conjoint analysis as

a data analysis technique is also explained, as well as the application of methods used to ensure reliability and validity in the study. The researcher's consideration of ethical issues concludes this chapter.

Chapter 5 presents the statistical findings related to the objectives. The findings are presented and discussed according to the objectives and sub-objectives of the study.

Chapter 6 offers discussions, final conclusions, implications and recommendations derived from the study's findings according to the research objectives. In addition, the research limitations of the study and future research directions are suggested.

1.11   CONCLUSION

The above discussion has drawn attention to certain notable developments in the South African retail industry in recent years. Since becoming a democratic country in 1994, South Africa's political makeup has evolved significantly, and this evidently also brought in changes to the retail and consumer sectors. Coinciding with the social and economic changes in South Africa, new consumer segments have materialized, and these highlight the unique complexities of this emerging market. As an example, the so-called 'female emerging market' has shown significant growth in the retail environment in South Africa over the past few years, making this group of crucial importance for retailers. It is important for retailers to analyse and monitor the buying behaviour of these emerging market consumer groups, and also to determine the product attributes to which they are partial. This study focuses particular attention on the female consumer in an emerging market, and her evaluation of retailers' apparel product assortment. Understanding this market will help retailers to adapt their product assortment offerings to the needs of the female consumer in the emerging market, and to refine their advertising and marketing campaigns to reach this consumer segment effectively. The next chapter provides an in-depth discussion of product assortment, product variety and the key attributes that influence the consumer's decision-making process when purchasing work wear in South African department stores.

CHAPTER 2: LITERATURE REVIEW

2.1   INTRODUCTION

This chapter comprises an overview of the previous literature and arguments pertaining to product assortment, product variety and the key attributes that influence the emerging market consumer's decision-making process. In this chapter the discussion of product assortment and product variety will specifically focus on the attributes used by female consumers in an emerging market in their evaluation of work wear assortments in South African department stores. Important product attributes relevant and related to apparel product assortment and product variety include style, fashionability, colour, size, quality, price, brand, store image and store name. These product attributes are defined and comprehensively discussed in the sections that follow. In the first section of this chapter, a detailed description and overview is presented of product assortment and product variety of work wear, with specific reference to department stores and to how the female consumer in an emerging market might evaluate the product attributes of the work wear category in the department store environment. Thereafter, an in-depth review is presented of the intrinsic factors, including style, size and colour, which might be relevant in the evaluation by female consumers in an emerging market of work wear in a department store. The last part of the chapter consists of an explanation of the extrinsic factors, including store image, price and brand, which might be relevant in the evaluation of work wear in a department store by a female consumer in an emerging market. Thirdly, this chapter will discuss factors that can be considered to be either intrinsic or extrinsic, like quality and fashionability. This chapter aims to provide a comprehensive background to and justification for the objectives formulated for this study, and to offer insight into the evaluation process of an apparel product assortment among emerging market consumers in department stores.

2.2   PRODUCT ASSORTMENT

Product assortment and product variety can be defined as the specific type or collection of products that are available within a retail store for consumer purchase (Clodfelter, 2013:272-273;278). In order to have the most profitable product assortment in a department store, a great deal of product assortment planning and preparation needs to be done by retailers. Product assortment planning can be defined as a process that is conducted by a retailer on a seasonal basis to determine the number of products in a seasonal plan and the number of units that need to be purchased to satisfy consumers' needs during that season (Rajaram, 2001:186). This is done to ensure that stores have sufficient stockholdings during peak and low periods of the season. Gajanan, Basuroy and Beldona (2007:138) state that a product assortment comprises the number of products and the variety of products in the product assortment. From a retailer's point of view, the aim of assortment planning is to identify an assortment that will maximize sales or gross margin within a limited monetary budget or restricted shelf space for displaying products (Kok et al, 2009:99).

Product assortment and product variety are often wrongly described and viewed as the same concept. These two very similar notions have very distinct differences and are conceptualized differently in research. Although several definitions have emerged over the past decade, the most prominent and widely accepted definition for product variety is that of Randall and Ulrich (2001:158). Randall and Ulrich (2001) state that product variety refers to the 'number of different versions of a product offered by a firm at a single point in time'. Another definition provided by Fisher, Ramdas and Ulrich (1999:297) states that product variety is the breadth of products that a firm offers at a given point in time, and also the rate at which a retailer introduces new products to the consumer. The breadth of a product assortment refers to the number of product lines a retailer carries, whereas the depth indicates the number of styles (or choices) offered to the consumer (Clodfelter, 2013:278). Generally, breadth indicates the different product categories offered by the store, such as style or brands, whereas depth indicates the number of products belonging to any one category in terms of sizes, colours and styles (Lee & Kunz, 2001:303). When one considers a work wear product assortment, the product breadth offered in a

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department store would pertain to different styles and brands of items such as trousers, jackets and shirts. The depth would be the number of different shirt sizes, styles or colour options available to the consumer. The key measurement of variety is called peripheral variety; which refers to the number of options that can be added on to the fundamental design of a product; an example of this is a change in colour, style or detail on a piece of clothing (Stablein et al, 2011:353).

When retailers practise category management (CM), certain activities such as shelf management, assortment planning, category business planning and promotional planning are performed. Among these activities, product assortment planning is classified as the most important, and is considered a key factor when performing CM (Gajanan, Basuroy & Beldona, 2007:136). Major department stores such as Wal-Mart in the USA implement CM by asking manufacturers to analyse the market for them. The resulting CM decisions are based on consumers' preferences, taste and need for variety (Gajanan *et al.*, 2007:136). Wal-Mart's recipe for success therefore stems from the fact that product assortment planning considers the consumer's preference for a product assortment and focuses on the key attributes that appeal most to the consumer. The consumer immediately feels a sense of satisfaction when entering the store, because the retailer is focusing on the key attributes that the consumer group uses when evaluating a product assortment.

The evaluation of a product assortment can be overwhelming for consumers due to the great variety that is available in department stores. Consumers will generally base their purchasing behaviour on the intrinsic and extrinsic attributes presented to them (Meixner & Knoll, 2012:1). In many cases there are no clear differentiations between product brands or consistent product attributes that make it easier for consumers to recognise and find the products they usually purchase in stores (Herpen & Pieters, 2007:79). Shoppers often approach decision-making with a pre-determined preference for a particular product, based on past experiences or verbal feedback from friends and family; if the product is available, they are likely to make a selection without a detailed evaluation of the other alternatives available to them (Cherney, 2003:171). If an alternative product is available, consumers are faced with identification costs (the cost of the process of establishing the nature/character of each alternative in the assortment) and then must consider if the attributes of one option are preferred above those of others (Herpen & Pieters, 2007:77). Retailers

aim to reduce identification costs by providing customers with a product assortment that is specifically aimed at the relevant target market.

Consumer decision-making related to product assortment has been described by researchers as a hierarchical process, in which consumers evaluate an assortment and then evaluate the product within that assortment (Cherney, 2003; Kahn & Lehman, 1991). The literature on product assortment has consistently found that consumers generally prefer larger assortments to smaller assortments. The reason that has come to the forefront is that the consumer then has more choice and product variety available to him or her to make a decision regarding the product assortment (Boyd & Bahn, 2009:p.289).

There are numerous factors that will affect the spectrum of product variety to which the consumer is exposed; an increase in demand for the product is one of the results of increasing product variety, and, secondly, store patronage is also likely to increase among consumers when product variety is increased (Amine & Cadenat, 2003:488). When a consumer discovers that he or she has a need for a product, he or she is likely to prefer a store that can offer them more than one variety of the product within an assortment. The benefit the consumer derives from such a retailer is that it is more convenient to purchase all the products he or she requires in one retail location rather than searching for products at different retail outlets.

As the retailer's product assortment increases in size, the probability of the shopper finding his or her most preferred product also increases (Miller, Smith, Mcintyre & Achabel, 2010:160). A potential increase in demand following the offering of a broader variety is shown in the tangible evidence of a higher store patronage or an increase in the average shopping cart (Amine & Cadenat, 2003:486). When there are more options for a product available to a consumer, the chances that the consumer will find what he or she is looking for are higher, and vice versa. Demand for variety exists because consumers' preferences are often heterogeneous, and because each individual consumer seeks variety in his or her own acquisitions (Tang & Yam, 1996:24). Category management ignores traditional product groupings, and focuses instead on understanding the way consumers shop in relation to the products in a category (Dewsnap & Hart, 2004:809). Previous research has found that one of the

key determinants of retail patronage and store loyalty is the product assortment offered by the retailer (Pan & Zinkham, 2006:230).

This indicates that apparel retailers may benefit from increased store patronage if they offer a larger product variety to their customers. Many business sectors, including the retail fashion industry, are devoting increased research efforts to realizing the implications of product variety (Fisher, Hammond, Obermeyer & Raman, 1994:83). When discussing product variety, the central question is how to maintain the most optimal level of product variety within a product assortment (Scavarda *et al.*, 2010:206). Ramdas (2003:79) emphasises that a suitable level of variety can generate profits by creating diversity in the market place. Caution is, however, required when variety is increased, since the decision-making costs will also in turn increase for the consumer. In terms of the local context, product variety may be an important consideration for the female consumer in an emerging market, but further investigation is needed, as empirical evidence has been found that the need for variety differs in terms of country demographics, customer segments and specific market requirements (Stablein,*et al.* 2011:354). If local retailers and marketers can identify how product variety can be used as a tool to create store patronage among consumers, they will also be able to increase their profits and increase interest in their product assortments.

2.3   APPAREL ATTRIBUTES

Clodfelter (2013:283-286) identifies attributes such as variety of style, colour, material, quality, price range, brand, type of merchandise (basic or fashionable) and country of origin as key product attributes that consumers, in this case from an emerging market, may use when considering apparel product assortments. Consumers each have their own pre-defined perception of a product, a store and what a product variety should look like. The consumer may rank certain diagnostic cues more highly than others, and the product assortment may therefore seem unsatisfactory to one consumer but satisfactory to another. It is thus crucial to conduct a thorough analysis in order to identify the cues that a target group such as female consumers in an emerging market rate as important, and thereby to increase

the retailer's market share and profitability. The concepts of style, colour, store image, size, quality, price, brand and name all form part of the product assortment and will be discussed individually in the sections that follow. These attributes, which consumers use when evaluating apparel assortments, may be either intrinsic or extrinsic (Fiore & Damhorst, 1992, Herpen & Pieters, 2007, Hoch *et al.*, 1999).

In terms of apparel, it is necessary to consider that a consumer may go to a department store with the intention of purchasing one specific product, but then leave with an impulse buy as well. In the last three decades research on hedonic products such as apparel has sparked a lot of interest among researchers (Hoyer & Stockburger-Sauer, 2012:167). Utilitarian products are viewed by consumers as mere extrinsic means to an end, whereas the hedonic aspects of a product relate to more intrinsic factors like product style and the appearance of the product (Grewal, Metha & Kardes, 2004:109). The following section provides a more in-depth discussion of the relevance of intrinsic apparel attributes in consumers' evaluations of apparel assortments.

2.4   INTRINSIC APPAREL ATTRIBUTES

Intrinsic cues are product attributes that are intrinsic to the actual product, which implies that if the attribute changes the product itself will be changed as well (Veale & Quester, 2009:195). The products in an apparel product assortment usually have intrinsic attributes such as colour, style and size. These attributes form an integral part of a product itself, and changing the attributes would alter the appearance and feel of the product. Since the focus of this study is directed towards work wear assortments, style, size and colour are of particular interest as relevant cues in consumers' evaluation and decision-making. Material and trimmings are also classified as intrinsic factors, but are more applicable when assessing individual alternative fashion garments and clothes to wear at home. The evaluation of a product assortment is considered to be a holistic assessment, while the evaluation of an individual garment is done in isolation.

2.4.1 Style

For the purposes of this study, style is defined as the structural design of an apparel product. Structural design is the result of construction as the design is assembled (Marshall, Jackson, Stanley, Kefgen & Touchie-Specht, 2004:268). According to Stone (2008:43), the distinctive appearance of a product or the combination of certain features that makes it unique can be seen as the style of an apparel product. Style includes dimensions such as silhouette and design (elements and principles). In general, consumers expect a variety of styles when shopping for apparel, but preferences may differ in terms of the number of styles they wish to examine before making a purchase decision (Clodfelter, 2013:177-178). Consumers may, for example, prefer a store with a wide variety of merchandise so that they do not have to go to several stores to buy all the products they are looking for (Da Silva & Alwi, 2008:179). Consumers' demand for variety of style may also result in multiple purchases (Kim, Allenby & Rossi, 2002:230).

Style is linked to fashionability or fashion style when used to refer to the custom of dressing that prevails among a group of people at a certain point in time (Perna, 1987:48). According to North, De Vos and Kotze (2003:42), as well as Brannon (1992), style can be categorized into three main groups. The first of these is 'high fashion style', which can be defined as the style of the moment, meaning the trend that is currently available in high street retailers and on the catwalks. Secondly, a 'classic' style is a look that is always available in a retail store in some form; classic styles are usually flexible and can be worn for several occasions. A style becomes a 'classic style' when a trend persists for long enough for it to become a classic style. A third category has emerged from the importance of practicality and comfort for consumers. Therefore the third style can be described as 'casual'. Tailoring is a technique used in clothing construction. It is a method of moulding and joining fabrics together to create a desired shape on a body (Jones, 2005:160). Work attire are often tailored as this gives the consumer increased confidence and confidence (Howlett, *et al,* 2013: 46). There is also variety of styles when all of the above clothing styles are available within a product assortment.

Fashion clothing and style hold a dominant and vocal position within the apparel retail market, and act as more than just a basic necessity in consumers' everyday

lives (Holmlund *et al.*, 2011:108). The style levels that were included in this study were classic styles, high fashion styles, tailored styles, variety of styles and casual styles. These levels are viewed as the most important and dominant categories pertaining to work wear in department stores.

2.4.2 Size

The size of a garment plays a vital role in the decision-making process of a consumer. Correct sizing could provide the retailer with a competitive advantage, since it represents a significant criterion in consumers' evaluation of apparel (Brown & Rice, 2014:62;198-199). According to Clodfelter (2013:284), retailers base their size curves on past records and historic data to develop an appropriate product assortment and variety for their target market. When consumers purchase a garment, generally the first thing they do is to check if their size is in stock. Brown and Rice (2014:212-213) state that size also relates to the target market's preferred fit of a garment. Size labels are used as cues (information pieces) by the target market to assess the suitability and fit of an item to the customer's body type.

Previous research suggests that the major problem with all size charts is that the body shapes in a population change continuously based on diet, physical exercise and migration, which makes it very difficult to have one universal size for all market groups and cultures (Tamburrino, 1992:45). In the current retail society, clothes are mass produced for the average/standard individual. Few retail stores cater for additional groups such as those needing petite or plus size clothing (Yoo, Khan & Rutherford-Black, 1999:220). Furthermore, each person's definition of a good fit may be subjective, but, in general, people will be inclined to be more satisfied with fit if their body shape was taken into consideration and catered for in a product assortment (Lee, Istook, Nam & Park, 2007:374). Since fit is considered to be one of the deciding factors when purchasing a garment, it is imperative that apparel retailers cater for various body types and sizes among different cultural groups and races (Lee *et al.*, 2007:375). The need for sizing that reflects different body shapes and dimensions may therefore be particularly relevant in the emerging context of South Africa as the population is characterized by diverse cultural groups.

When determining size for creating a piece of apparel, the first step to consider is pattern construction. Pattern construction is used to determine the dimensions of a garment. The size of the pattern pieces is based on body measurements or dimensions (Gill, 2011:228). In this regard, the size label on a garment usually provides the consumer with information about the size of the garment, and therefore the information has to be given in an efficient and concise manner (Chun-Yoon & Jasper, 1995:429). However, in many instances size labels lack useful information about the size of the garment, and do not guide consumers in making the right size choices (Chun-Yoon & Jasper, 1995:429). From the initial establishment of the ready-to-wear apparel industry, clothing sizes have been indicated either in numerical form or in single digit letters (Kidwell & Christman in Chun-Yoon & Jasper, 1995:429). These size indications are still used today, but several inconsistencies in sizing remain the cause of much dissatisfaction among consumers as well as retailers, with a consequent loss in profits (Workman, 1991:32). In a study conducted by Chun-Yoon and Jasper (1995:439), it was found that consumers preferred a size description system that included a minimum of two key body dimensions to the current numerical code that most retailers use. In places such as Europe, America and Canada it is mandatory to include information on a garment pertaining to the fibre content, country of origin, care instructions and the identity of the retailer or the brand.

From the literature it is evident that the apparel industry still has several issues to deal with in terms of sizing standards. Although retailers and manufacturers may target specific groups such as petite or plus sizes, sizing may still vary in specific garments (Faust, Carrier & Baptiste, 2006:71). In terms of assessing an apparel product assortment, it would thus be important to understand consumers' preferences in terms of specific size categories such as petite sizes, plus sizes and standard sizes, and whether this will influence their evaluation of a product assortment. Size as an intrinsic attribute was included in this study, with petite sizes, plus sizes and standard sizes as levels to this attribute.

2.4.3 Colour

Colour is one of the most significant visual cues consumers use when evaluating consumer products (Blackwell, 1995:24). The perception of colour in apparel

products is, however, a multi-dimensional, intricate experience (Funk & Ndubisi, 2006:41), since it is often analysed not as a single attribute on its own, but rather in conjunction with other attributes such as fashionability, store image and style, to name but a few (Crozier, 1999:13). Furthermore, researchers have only recently started acknowledging the influence of colour on consumers' buying behaviour, and therefore literature pertaining to colour influences is still rather varied and fragmented (Ndubisi & Funk, 2006:42).

In general, colour is considered as an intrinsic attribute of an apparel product, with a twofold dimension. First, it serves as a cue (i.e. it provides information) and, secondly, it serves as a component (i.e. it represents the consumer's preferred colour) for the purpose of this study colour will be analysed from a cue perspective. In terms of consumers' colour preferences, several factors need to be taken into consideration when planning an apparel assortment. A study by Silver, Mcculley. Chambliss, Charles, Smith, Waddell & Winfield. (1988) found that white and black participants preferred blue, red, black, purple, green, yellow, white, orange and brown. However, previous research also suggests that consumers favour certain colours over others in specific product styles. For example, consumers might commonly prefer black shoes over red shoes, but prefer a red dress over a black dress (Grossman & Wisenblit, 1999:79). Limited research regarding the link between colour preferences and the specific purpose of a product type has been conducted (Kauppinen-Raisanen & Luomala, 2010:287). Mundell (1993:21) did, however, establish that the most popular colours for clothing are blue, red and black. The popularity of a colour would also depend on the different dimensions that determine a colour, namely hue, value and chroma (Crozier, 1999:7). Crozier (1999:8) explains that 'perceptible colours do not map directly on to colour words'. The term 'red' can therefore refer to a large number of distinct colours in terms of dimensions such as value and chroma that determine the brightness of the hue. Crozier (1999:6) argues that brightness exerts significant influence on judgement, and that brighter hues are consistently favoured by consumers.

In addition to the above, it is necessary to consider that many consumers' favourite colours could have been created via an association with a favourite stimulus (Funk & Ndubisi, 2006:42). A favourite stimulus is not the only way consumers identify favourite colours; consumers have a wide range of colour associations, which makes

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the task of understanding colour responses intricate and complex (Grossman and Wisenblit, 1999:80). Consumers could, for example, associate a colour with significant events in their culture. In planning a product assortment, the retailer should thus have a good understanding not only of the target market's preferences towards colours, but also of the cultural meanings associated with specific colours within the target market's culture (Funk & Ndubisi, 2006:45). In the western world, white has been associated with peace and purity, red with strength and passion, light blue with calmness, purple with royalty and yellow with a joyful feeling (Funk & Ndubisi, 2006:42). Different colours sell better in different countries due to culture differences and preferences. According to Crozier (1999:9), red is a popular choice for lingerie in Spain, but lilac sells poorly in Scandinavia as lilac symbolises mourning to Scandinavians.

In terms of apparel assortments, fashion trends and seasonal changes are also an important consideration (Clodfelter, 2013:274-275). Ultimately colour is a tool that can decide whether an apparel product is a high fashion product (where the specific colour is part of a current trend) or a basic bread-and-butter line that is repeated across the seasons with minimal change to the colour (such as black or white clothes). In general, apparel products that belong to a certain fashion trend will all have the same colours and patterns to create a story that is visually appealing to the consumer. These colour combinations can be used to attract consumer attention and enhance communication through the use of specific visual cues (Lohse & Rosen, 2001:73). An effective attention-grabbing strategy is to use bright colours as a cue to create interest (Funk & Ndubisi, 2006:41), and then to encourage consumers to explore assortments and evaluate colour combinations in the assortment not just in terms of fashion but also in terms of personal preferences (how suitable/appropriate it is for them).

Because colour forms part of the sensory knowledge of the consumer, it can stimulate the physical senses of the consumer and can result in a positive or a negative buying experience (De Klerk & Lubbe, 2008:37), which clarifies its significance in product assortment planning. It may be argued that female consumers in emerging markets assess product assortments based on their favourite colours and the meaning a colour holds within their culture. The challenge facing apparel retailers is whether these consumers have a universal preference when it comes to

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specific colours. This is not only important from a theoretical point of view, but also, from a practical point of view, it can be applied in the fields of design, advertising and marketing (Crozier, 1999:6). Previous research has also based colour preference on universal colour preferences among cultures, races, genders, ages and personalities (Kauppinen-Raisanen & Luomala, 2010:290). Preferences have been assessed in different ways, but usually participants are presented with a wide colour spectrum and then asked to rank individual colours on a longitudinal range by picking or using flash cards (Crozier, 1999:8). Because consumers use colours and combinations in assortments and decide on how to coordinate items to complement each other (Clodfelter, 2013:282), the focus of this study is to find a connection between colour as an attribute and the role this cue plays in the product evaluation of consumers who purchase apparel. To accomplish this, hue, value and chroma need to be incorporated in the ranking process by grouping similar colours together. Respondents are then asked to rank colour families with an accompanying word that will act as a stimulus to explain them, e.g. neutral colours, bright colours, warm colours, cool colours, muted colours and earth colours. These colour combinations are typical intrinsic attributes of a work wear apparel assortment and therefore represent an important consideration in the female emerging market consumer's decision-making when purchasing work wear. For the purposes of this study, levels were thus included that described colour as an intrinsic attribute in terms of neutral colours, bright colours, seasonal colours, muted pastel colours and earth tones.

2.5   EXTRINSIC APPAREL ATTRIBUTES

Extrinsic attributes are aspects that are related to a product but are not physically a part of it, and are product characteristics that can be changed without changing the core purpose or use of the product (Veale & Quester, 2009:195). Among others, extrinsic attributes include name brands, price, and country of origin. These attributes are often directly linked to indicators like quality and value (Teas & Agarwal, 2000:278). To a large extent, consumers rely on extrinsic attributes when evaluating a product assortment, and these attributes are used to analyse quality indicators when consumers are not familiar with an intrinsic attribute (e.g. style, size or colour), and vice versa. This means that if consumers have limited knowledge of the intrinsic

attributes of a product, they will rely on extrinsic attributes to make a purchasing decision (Zeithaml, 1988:9). According to Herpen and Pieters (2007), the extrinsic attributes of a product are a diagnostic for the unknown intrinsic attributes, especially in the case of complex product assortments. For the purposes of this study, consideration will be given to price, brand, store image and country of origin as key product attributes of work wear apparel assortments in department stores within the South African retail sector.

2.5.1 Price

Price is classified as an extrinsic cue, since it is a non-physical product characteristic that does not form part of the actual product but still plays a significant role in the consumer's mind when making a purchasing decision. From a consumer's perspective, price can be defined as something that is 'given up or sacrificed' to obtain a product (Zeithaml, 1988:10) or, in the case of this research, clothing in a department store. Pricing is one of the most central and important decisions faced by clothing retailers today. Price and quality are considered differently when the perceived value for money is included in the decision-making process (North *et al.*, 2003:43). According to Eckman, Damhorst & Kadolph (1990:14), extrinsic product attributes, namely brand and price, are the attributes that are most frequently used by consumers when assessing apparel. Retailers are facing increasingly sophisticated customers, who are extremely adept at finding the best deals available in the market (Su, 2007:726). The result is that retailers are constantly improving their pricing strategies to collect as much revenue as possible, and consumers are constantly modifying their purchase plans to pay as little as possible (Su, 2007:726).

In order to attract a specific market segment to their stores, retailers often begin with a price point policy that will appeal to a specific consumer group. They also strategize their branding around the specific target market. The literature suggests that consumers perceive price both positively and negatively, and that these perceptions will ultimately influence their purchasing behaviour (Moore & Carpenter, 2006:166). Price can have a positive influence when consumers find a product they like that is in the price bracket they had in mind. On the other hand, when consumers spend a lot of time comparing prices and their efforts do not result in a purchase, this may have a negative influence on the shopping experience. The pervasive influence of price is

due in part to the fact that the price cue is present in all purchase situations and, at a minimum, represents to all consumers the amount of economic outlay that must be sacrificed in order to engage in a given purchase transaction (Slovic & Lichtenstein, 1971).

Research has been conducted on the most important factors for choosing a retail outlet. The findings provide a reliable list of reasons why customers patronize a store. Price, assortment, location, perceived product quality and customer service are the most commonly-cited factors (Amine & Cadenat, 2003:486), with price being one of the main cues that affect the product assortment and the varieties of products offered to the consumer. Gajanan *et al.* (2007:138) are of the opinion that consumers analyse the qualities and prices available to them before purchasing a product. If they decide to make a purchase, they are most likely to buy the product that gives them the largest consumer surplus. This is the difference between what they are willing to pay and the price charged by the retailer (Gajanan *et al.*, 2007:138). Concepts that represent price in its negative role include: price consciousness, sale proneness, and value consciousness (Amine & Cadenat, 2003:326). In a study by Holmlund *et al.* (2011:113), price was assigned a back seat when set against the fit of the design, colour, design detail, quality, fit and shopping convenience. The respondents did, however, stress that they would always search for the best price-to-quality ratio, indicating that good quality does not come cheap, and that a good fit implies a higher price. The need for and importance of the apparel product the shopper was purchasing also played a role; respondents were willing to pay more for corporate office clothing than for casual day wear (Holmlund *et al.*, 2011:113).

Within the South African context, limited research can be found on the subject of price and the effects it has, as an apparel product attribute, on consumers' purchasing decisions. Previous research that does not specifically pertain to South Africa suggests that when a new product enters a market, there are two things that will ensure its competitive advantage over other similar products in the market (as measured by its cumulative sales at a point in time), namely quality and price (Smith, 1986:70).

Other attributes, such as brand, style, fashionability, quality, country of origin or colour, could be the deciding factor for consumers when purchasing apparel and

evaluating product assortments. In order for firms to gain a competitive advantage over competitors, retailers constantly need to re-evaluate and modify product attributes. Factors such as evolving consumer views, increases in manufacturing costs and competition from new and fresh brands are the driving forces behind changes in product characteristics (Ofek & Srinivasan, 2002:398). Product changes and value-adding modifications ultimately influence the cost of and demand for products, which are directly related to the retail selling prices of products (Ofek & Srinivasan, 2002:398). For the purpose of this research study the levels that are included for price as an attribute is low to medium prices, medium to high prices and high to very high prices.

2.5.2 Brand

The definition of brand has evolved over years from marks, names and logos, to marketing strategies and development (Okonkwo, 2007:9). The result is that a brand has the ability to produce an emotional and psychological attachment with consumers and a financial gain for the brand owner (Okonkwo, 2007:9). The primary use of the word 'brand' now has a commercial application and will always mean the object by which an impression of a product is formed (Clifton, 2009:13). In the context of a product assortment, the brands included in the assortment will influence consumers' product evaluation, based on prior perceptions they have of the brand. The demand for apparel products with brand names has increased in the past decade (Huddleston & Cassil, 1990:255). Brands benefit retailers by generating profits and by creating publicity for the store, which results in more store traffic (North *et al.*, 2003:42). Brand name products also create a certain image for a store, and retailers use this image to convey a message to consumers in their pre-purchase decision-making stage (North *et al.*, 2003:42).

In general, retailers define two types of brand to distinguish products – national brands (well-known brands which are sold through a wide variety of outlets, e.g. Levis) also known as designer brands, and private brands (brands which form part of the retailer, e.g. Kelso, which is only sold in Edgars' stores) also known as store or in-store brands (Clodfelter, 2013:193). Goldsmith, Flynn, Goldsmith & Stacey (2010) conducted a study to measure consumers' attitudes towards private (in-store) brands and national (designer) brands. They established that private brand buyers felt that

these brands were more relevant to their lifestyles and that private brand buyers had more faith in the overall performance of the product (Goldsmith *et al.*, 2010:345). Branding is one of the key factors that differentiate one product from another in the fashion retail industry, since it adds uniqueness to the product and cannot be emulated by other retailers. Corporate branding is used by organizations to enhance and sustain their uniqueness through linking corporate features to products and services and allowing consumers to generate their own synergies regarding the brand (Anisimova, 2007:395). Consumers generally become loyal to a brand because of previous buying experiences and the evocation of groups of attributes that they assign to a certain product or product assortment. Retailers' influence on brand choice behaviour is therefore important, but consumers may also develop evoked sets of attributes without retailer influence and then locate a retail outlet that sells their preferred brands.

Brand alliances provide a particularly interesting set of contextual factors influencing consumer behaviour (Levin, 2002:145). A brand alliance occurs when two independent brands from a retail sector merge together (Kotler & Pfoertsch, 2010:246). In the midst of rampant competition, the success of each brand depends to a considerable extent on having the right product at the right time and in the right place for the customer (Cholachatpinyo Padgett, Crocker & Fletcher, 2002:25). Previous research has indicated that emerging market consumers were reluctant to adopt store (private) brands because these brands did not offer functional benefits such as quality, freshness, high performance, durability and high aesthetics (Herstein & Jaffe, 2007:16). It would therefore seem that the emerging market consumer will not just settle for any type of brand that is made available to her, but desires the best brand at a reasonable price, and will go to different stores to acquire this.

In the past, limited research has been conducted on the battle between in-store (private) brands and designer (national) brands, but recently increased research efforts have improved our knowledge of how private brands contend with national brands (Arce-Urriza & Cebollada. 2012: 1776; Mieres, Martin & Gutierrez, 2006: 62; Sayman, Hoch & Raju. 2002: 388). In recent years, private brand retailers have improved the quality of their brands, repositioned branded products, and reinvented their image in such a way that they have their own identity within the marketplace and are not seen simply as copies of national brands (Mieres *et al.*, 2006:62).

Previous studies that analysed the perceived risks of in-store brands vs. designer brands found that consumers thought that there was a higher risk in generic alternatives than in designer brands. When private brands were incorporated into the mix, researchers found that in-store brands were preferred by consumers to generic alternative brands, but were still considered inferior to designer brands (Mieres *et al.*, 2006:63). Quality differentiation between in-store and designer brands is usually manifested in consumers' perception that in-store brands are of a lower quality than designer brands in the same product category (Choi & Coughlan, 2006:79).

In-store brands are incorporated into a product assortment to improve the efficiency of the consumer decision-making process by offering a good quality product at a lower price than a designer brand (Goldsmith *et al.*, 2010:339). By doing this, the retailer also offers a larger variety of brands to the consumer, which will result in a higher likelihood of a purchase. Consumers can benefit from purchasing in-store brands due to the potential savings in cost. With the same clothing budget as if they were purchasing designer brands, consumers can purchase a larger quantity and variety, and, in some cases, items of better quality (Goldsmith *et al.*, 2010:340). Despite all the benefits that in-store brands offer, consumer spending on in-store brands is only a fraction of that spent on designer brands (Goldsmith *et al.*, 2010:339). Evidently, a deeper understanding of consumers' motivations and preferences with regard to brands is required if retailers are to compile product assortments that will appeal to consumers.

In-store brands seem to be a growing trend within apparel department stores, as retailers are constantly improving on quality, visual appeal and variety. In the apparel industry designer brands may lose their competitive advantage if retailers are able to offer in-store brands at the same quality as designer brands (Choi & Coughlan, 2006:80). Choi and Coughlan (2006:80) found that by adding a unique 'feature' to a private label item, differentiation is optimised. This is due to the value consumers place on product variety within a product assortment. In-store (private) brands are usually targeted at consumers who are looking to stretch their income, which may typically apply to emerging market consumers.

To date, limited research has been conducted within the South African apparel industry to understand consumers' perceptions and preferences regarding brand

assortments, and therefore further inquiry is needed in this domain. Of particular interest for this study is the variety of brands offered by a retailer and how this influences the consumer's assessment of the retailer's product assortments. In the South African context, several department stores stock a mix of in-store and designer brands in the hope of attracting more consumers and increasing sales. Levels included in the description of brand as an extrinsic attribute were designer brands (national brands), in-store brands (private brands) and a variety of brands (combination of designer and in-store brands).

2.5.3 Store image

Chang and Lang (2010:513) define store image as the consumer's perception of a store and its product assortment, and store image is based on different attributes. Retailers invest considerable effort and financial means into creating a store image that will give them a competitive advantage over other retailers in the industry (Joyce & Lambert, 1996:24-33). Retailers do this to differentiate themselves from competitors and to attract consumers' attention by portraying an image that will appeal to the store's target market. In order to understand the factors that affect store image and the role store image plays in the evaluation of a product assortment, researchers have explored various store attributes that are considered by the consumer when making purchasing decisions (Theodoridis & Chatzipanagiotou: 2009:709).

Limited research has been conducted on the role of store image as an attribute within the product assortment and the effect this will have on retail marketing, positioning of products, product mix strategies and tactical approaches (Kenhove & Wulf, 1999:125). Yan, Yurchisin & Watchravesringkan (2010:346) suggest that location, convenience, price, promotion, store layout, quality and sales staff are aspects that contribute to the consumer's perception of store image. Researchers including Ghosh, Tripathi and Kumar (2010:76) state that empirical evidence pertaining to the retail environment shows that attributes such as lighting, colour, sales personnel and music (also known as store atmospherics) affect consumers' perceptions of the store image. Visser, Du Preez & Noordwyk (2006) studied the importance of apparel store image attributes as perceived by female consumers, through the use of eight focus groups. They found that product assortment and personnel were most important to

consumers and were followed closely by service. Essentially, product assortment is therefore closely linked to store image, and store image will have an influence on how consumers evaluate a product assortment.

The dominant perspective among researchers is that store image needs to be treated as a multi-attribute concept that can be measured through a multi-attribute model. These attributes comprise both the functional elements and the symbolic elements of store image, and can be used as a baseline when studying store image (Burt & Carralero-Encinas, 2000:437). In today's competitive retail industry, a customer seeks more than a good experience of product variety and quality; the customer seeks a combination of many attributes that create a positive retailer store image (Theodoridis & Chatzipanagiotou, 2009:709). Attributes are evaluated and weighed against one another to determine a consumer's perspective of store image within the product assortment. From the above statement it can be seen that store image can be defined as the 'complex consumer's perceptions of a store on different (salient) attributes' (Bloemer & Ruyter, 1998:505).

Consumers' evaluations of products and product assortments serve as key factors when the consumers do not have predefined notions about the level of service quality they will receive in a retail store, because in these cases consumers will base their perceptions of a store on the product and product assortment attributes visible to them (Baker *et al.*, 1994:330). Store image and how store image influences consumers can be considered in two categories, namely functional characteristics and psychological characteristics (Kasulis & Lusch, 1981:419). Functional characteristics include location, size and store trading hours; whereas psychological characteristics include visual attractiveness of the store, store décor, friendliness of employees, and service (Kasulis & Lusch, 1981:419). Bloemer and Ruyter (1998:499-513) agree that store image consists both of visible attributes (functional qualities), such as the quality and availability of merchandise for the consumer, and less tangible attributes (psychological qualities) such as atmospherics (which include light, sound, smell and colour). Consumers evaluate and choose retailers on the basis of the store image the retailer's project onto the customers, so it is of vital importance to the retailer to promote and transfer the right image to their customers, who can help to attract more customers, and also to increase sales (Chang & Lang, 2010:514).

Consumers tend to have a global image of a retailer. There are, however, several attributes that contribute to the holistic store image; each attribute has a different weight in a consumer's mind and in different consumer markets such as female consumer groups in emerging markets (McGoldrick, 2002). Attributes are measured against one another in the consumer's mind when the consumer analyses a store image within a product assortment. Global marketing has become an on-going and growing trend in the retail market. It is therefore crucial to investigate and analyse the attributes of retail stores that are important to customers in foreign markets in order to attract them to a store's product assortments and to gain a competitive edge in the market (Seock & Lin, 2010:95).

In this research study the focus is on the psychological attributes, combined with the preconceptions a consumer has about apparel product assortments in department stores within the South African retail sector. The levels included to describe store image as an extrinsic attribute were discount image, fashionable image, convenience image, exclusive image, quality image and value oriented image. Within the retail sector, these store images are considered the most common amongst department stores.

2.5.4 Country of origin

Country of origin (COO) has been a well-known topic of discussion and investigation since the early 1960s (Bilkey & Nes, 1982:92). Samli (1995:120) summarised country of origin in this field as a concept that forms a critical information cue in the decision-making process of a consumer. Previous research suggests that country of origin is a complex issue, and various aspects can influence how it is analysed and evaluated (Phau & Suntornnond, 2006:34). Country of origin (COO) can be described as the country where a product or service originated, and may differ from the country of brand, assembly or design (Veale & Quester, 2009:196). The COO is an extrinsic cue, since the consumer can attach meaning to a garment that is produced in a specific country. The significance of COO has resulted in a stream of industrial buying research (Cordell, 1992:252). Within emerging markets, consumers are becoming more and more aware of the COO of products, due to technological advances like internet access, travel and increased education (Essoussi & Merunka, 2007:410).

One key dimension used when consumers evaluate the COO is the country image (CI), which can be defined as the overall perception consumers have of a product from a particular country, based on their prior knowledge of the country's production and marketing strengths and weaknesses (Roth & Romeo, 1992:480). A strong CI emerges when there is a particular combination of elements such as the history, geography, political system, famous citizens, economic status and culture of the country (Veale & Quester, 2009:196). Generally, a country with well-educated citizens that is economically strong and has a high standard of living will be favourably perceived by consumers (Veale & Quester, 2009:196). Countries that are new to the market and are not known for exporting to the global market may encounter a negative prejudice towards their products if little is known about the country and the CI (Veale & Quester, 2009:196).

Many retailers require suppliers to add the COO 'made in' label in all garments. This is a marketing tool used by retailers to create a strong country of origin image for products (Tseng & Balabanis, 2011:581). However, viewing the COO from a single perspective does not adequately reflect the complexities of emerging markets, as very often retailers in emerging markets have to rely on products that are designed and manufactured in more than one country (Jaffe & Nebenzahl, 2001) to compile their product assortments.

Beaudoin, Moore & Goldsmith. (2000) tested the relationship between fashion leadership and attitude toward imported apparel (apparel with a different country of origin). The findings from this research revealed that fashion leaders preferred clothing from other countries because this gave a larger variety than among locally produced apparel. In this context, the question to be asked is whether the South African female emerging market consumer utilizes COO in their evaluation of product assortment in department stores. The use of national symbols and icons to indicate a COO might appeal to marketers and buyers in the retail sector, especially when some consumers have shown patriotic tendencies to buy locally-made products (Insch & Florek, 2009:453). Limited research has been conducted to link the actual purchasing decision to the COO, but some evidence suggests that there is a positive association in the consumer's mind when the COO is considered (Insch & Florek, 2009:454).

In terms of the South African context, three options, namely 'Proudly South African', 'Made in China' and 'Made in Europe' may be of particular interest to determine the emerging market consumer's preference about the COO of work wear. 'Proudly South African' clothing can be described as clothing that has been manufactured and designed in South Africa, 'Made in China' refers to clothing that has been manufactured in China, and 'Made in Europe' means that the clothes have been manufactured in Europe.

2.6   INTRINSIC AND EXTRINSIC APPAREL ATTRIBUTES

2.6.1 Fashionability

Fashion refers to a prevailing and accepted trend at a specific point in time (Clodfelter, 2013:177-178). Fashionability, however, has different connotations, and depends on factors like age, style preferences and peer pressure. Fashionability and style – the prevailing or popular mode of expression – go hand-in-hand, but they are two very different attributes when evaluating products in a product assortment. The latter refers to the structural design of a product, whereas the former pertains to the time or season a product is introduced into the retail market, and on how trendy and in-line the product is with the most current and up-to-date fashion trends.

Consumers rely on different dimensions to evaluate fashionability as an attribute in the product assortment. Dimensions of fashionability can be used as both intrinsic and extrinsic cues by consumers when evaluating a product assortment. The intrinsic dimension of fashionability generally refers to how a trend is interpreted by the retailer so that it offers specific styles, colours or materials (Stone, 2008:43-44). Retailers need to change their physical products on a constant basis to appeal to the needs of consumers. Fashion may also be classified as an extrinsic cue when it is related to consumers' perceptions of the fashion retailer's fashion image and, in particular, of the retailer's ability to change the fashion products in the store and to create a new and fresh look on an on-going basis (Bruce & Daly, 2006:329). Fashion changes are promoted by retailers as a planned obsolescence, where the aim is to introduce new and innovative fashion apparel continuously to motivate consumers to

make a purchase (Law, Zhang & Leung, 2004:362). Retailers usually introduce new products on a seasonal basis, and often find it challenging if faced with an emerging market or new target group when very little information is available not only about the purchasing processes of that new group, but also about their product preferences and the thought processes behind their product assortment evaluation (Richardson, 1996:400).

A study by Holmlund *et al.* (2011:111) indicated that the need for fashion and fashionable clothing among consumers changes according to their demographic profile, including aspects such as age and gender. For example, older and more mature consumers prefer less fashionable clothing, and therefore highly fashionable clothing is generally not targeted at mature consumers. Furthermore, a consumer's cultural background may also have an impact on his or her acceptance of fashionable clothing as was found in a study conducted by Forsythe *et al (*1999:279). Forsythe et al stated that favoured product attributes, brands people buy and the benefits they desire are all culturally based (Forsythe *et al.,* 1999: 279). It can therefore be argued that the acceptance of fashion apparel by consumers in an emerging market will be influenced by members of the community to a much larger extent than its acceptance by those who belong to western cultures who tend to assign a more central role to individual decision-making (Burgess & Steenkamp, 2006). Fashionability as an attribute of the product assortment influences consumers' purchasing decisions through the concept of fashion orientation. Belleau, Nowlin, Summers & Xu (2001:134) describe fashion orientation as a consumer's attitude towards, interest in and opinion of fashion products when making a purchase. Holmlund *et al.* (2011:111) found that female consumers tend to follow fashion trends on a more regular basis than their male counterparts, because females use fashionable clothing as a self-confidence tool. These researchers also found that females tend to update their style approach more frequently, and that the clothing they wore ten years ago was not a reflection of current fashion or of what they believed to have been fashionable ten years ago (Holmlund *et al.*, 2011:111).

In spite of differences in terms of age and other demographic traits, fashionability plays a vital role in the decision-making process of the consumer who is buying clothes, and it therefore requires further clarification as a relevant factor in the evaluation of product assortments. Previous research suggests that, from a

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theoretical point of view, fashionability can be explained in terms of the fashion adoption theory developed by Sproles (1979, 1994). This theory identifies fashion-oriented consumer behaviour, and suggests three key phases that affect the consumer decision-making process with regard to apparel: (1) pre-existing conditions; (2) directing influences on consumer choice through the use of fashion; and (3) a central channel of consumer decision-making (Sproles,1994).

Pre-existing conditions relate to consumers' awareness of products and their current level of acceptance of these products (Gam, 2010:180). In our study, this refers to how the emerging market consumer perceives the product assortment available to him or her in department stores, and to whether he or she likes it or is dissatisfied with it or even finds it wanting in certain product attribute areas. Pre-existing ideas and past information gathered about a product assortment will influence how emerging market consumers seek information about the product assortment, and will also influence their decision-making process about the product and product assortment of work wear.

The second stage in the fashion adoption process involves specific influences on consumers' choices and their eventual use of fashion. These influences may include psychological and social forces (Gam, 2010:180). This suggests that consumers will adopt fashion through cognitive orientation, psychological identity and social influences, as well as lifestyle. According to Sproles and Burns (1994), the main reasons consumers adopt a new fashion are a change in societal and economic conditions, to escape boredom, or because of a need to gain acceptance in a social group.

In both the first and the second stages of the fashion adoption process, consumers have gathered all the information they need to make the final decision of whether or not they are going to purchase the product. The final decision to purchase a product is realized in the third stage of the adoption process, a central channel of consumer decision-making. This is the stage where the emerging market consumer makes the decision to purchase the product from a specific retailer's product assortment.

To summarise, the fashion adoption theory suggests that a consumer's decision to purchase starts with an awareness of new fashion and social issues (Gam,

2010:180), and is then concluded by a decision to purchase a fashion item from a particular retailer's product assortment.

2.6.2 Quality

Quality is seen as the degree to which a product or product assortment of a retailer meets the requirements or expectations of a consumer (Brown & Rice, 2014:68). In relation to this study, the quality of a product assortment is measured by the use of both intrinsic and extrinsic attributes. The intrinsic dimension refers to the functional performance of the product assortment, such as its construction, material, serviceability and overall finish (Brown & Rice, 2014:69-70). Consumers are often unable to make an objective assessment of the functional quality of products that are available to them before making their product decision, and in these instances they rely on alternative product cues to make their final decision (Purohit & Srivastava, 2001:123). A number of extrinsic cues are known to influence the consumer's perception of product quality; these may include price, brand, retail outlet and country of origin (Veale & Quester, 2009:195). When a consumer purchases a product, the product quality is often a missing link when evaluating a product assortment because of the lack of information available to the consumer about the product. This is particularly relevant when a consumer buys a certain product for the first time and cannot rely on past experience to determine the quality of the product or the product assortment. In such instances the consumer will often use other product attribute cues like price, brand and country of origin to determine the quality of the product, and this in turn relates to perceived quality (Estelami, 2008:197).

The price-quality relationship is specifically relevant in terms of the above. The price-quality cue utilization theory postulates that consumers perceive higher-priced goods as higher-quality products, and therefore tolerate higher prices because they are perceived as being an indicator of good quality products (Estelami, 2008:199). In terms of this research the researcher will attempt to establish how consumers in the South African retail market evaluate quality as an attribute in the product assortment of a department store. Levels included to describe quality, as an intrinsic and extrinsic attribute, are easy care, standard of manufacture and durability.

2.7 CONCLUSION

This chapter focused on describing and clarifying all the important concepts for this study, and provided an overview of the literature relevant to the topic under investigation. As can be gathered from the information presented in this chapter, there is a vast amount of literature on product assortment and the role of product attributes in the decision-making process of consumers. That being said, however, few empirical studies have been conducted to highlight the importance of these aspects in South Africa and the emerging market context within this country. Although limited evidence exists regarding the emerging market context, the literature presented in this review, together with the theoretical perspective which will be explained and discussed in the following chapter, provides initial insights and the basis for the conceptual framework that will be used for this study. The main focus will be on the cue diagnostic framework, which forms the key instrument in the emerging market consumer's evaluation of work wear product assortments in South African department stores.

CHAPTER 3: THEORETICAL PERSPECTIVE

3.1   INTRODUCTION

This chapter provides a background to the theoretical perspective and theoretical thought processes that were used as the basis of this study. The study was based on a theoretical approach called the cue diagnostic framework, which was originally developed by Slovic and Lichtenstein in 1971. Later research by Richardson, Dick and Jain (1994) indicates that the cue diagnostic framework builds on the cue utilization theory; this theory suggests that the extent to which the cue for a product is evaluated will vary within its perceived diagnostic. A more recent study by Vocino and Oppewal (2009) also serves as an example of how to understand consumer product search behaviour using the same diagnostic framework (Vocino & Oppewal, 2009).

The cue diagnostic perspective provides a unique insight into those attributes that are ranked more highly than others in the consumer's mind when the customer evaluates the product assortment of work wear in a department store. This consumer-based approach was considered particularly appropriate for this study, in terms of the prioritization by a female consumer in an emerging market of product attributes when she is shopping for work wear and evaluating retailers' product assortments. Combined with the literature review presented in Chapter 2, the cue diagnostic framework offers a theoretical basis for the study and provides an overall perspective on the specific phenomenon to be studied. It also clarifies the basic elements that should be examined in any particular situation, and identifies the relevant concepts for the purposes of the investigation. The schematic model derived from this serves as a conceptual guideline for the researcher on which to base certain predictions, and is therefore an important element in this research study. As such, the last section of this chapter highlights a conceptual framework that was adapted from the original cue diagnostic framework and was further specified according to the objectives of this study.

3.2   CUE DIAGNOSTIC FRAMEWORK

The cue diagnostic framework (Slovic & Lichtenstein, 1971) was selected as a suitable framework for studying the evaluation by a female consumer in an emerging market of the product assortment of work wear in a department store through the use of product cues. The cue diagnostic framework builds on cue usage that suggests that most of the important judgements and choices of the consumer are based on multiple attributes (Slovic & Lichtenstein, 1971). This argument can be extended to apparel purchasing situations in which the consumer is often exposed to numerous types of attributes of the product assortment at the same time. Consequently, the consumer relies on multi-attribute evaluation to make a final decision (Connolly & Srivastava, 1995:219). Purohit and Srivastava (2001:124) argue that the way in which consumers use an attribute or incorporate or combine it in their final evaluation may depend on the significance of the attribute.

The cue diagnostic theory therefore implies that the degree to which a specific cue is used by a consumer depends on its predictive/prognostic or diagnostic value (Slovic & Lichtenstein, 1971). Conjoint analysis is a method which aligns with the underlying assumptions of the cue diagnostic framework. Conjoint analysis allows researchers not only to evaluate the importance of each attribute but also to consider the level of importance of each attribute (Jin, Park & Ryu, 2010:186). Consumers evaluate and base their purchasing decisions in respect of a product on various product attributes or cues from which they form a set of evaluative criteria (Jin *et al.*, 2010:180). Consumers select products based on attributes which are favourable and are in line with their needs, and in turn these attributes create a positive outcome for the consumer and are supportive of the consumer's personal values (Wickliffe & Pysarchik, 2001:99). On the other hand, product attributes are used by retailers as marketing variables to influence the purchasing decisions of consumers (Forsythe, Kim & Pethee, 1999:275). A consumer reacts to the product attributes when he or she becomes aware of a product he or she favours. This causes the consumer to evaluate the characteristics of a product closely before determining the extent to which the product is acceptable (Le Blanc & Turley, 1994:10). The attributes of a product can thus be aligned to the consumer's goals or preferences. Every attribute has a utility value that consists of information and that helps the consumer to make

judgements or decisions (Barron, 2000: 335; Slovic & Lichtenstein, 1971). Consumers often make assessments of products based on their diagnostic attributes (Menon, Raghubir & Schwarz, 1995:212). It is argued that consumers may evaluate product assortments in a similar manner.

To develop an understanding of how attributes/cues affect the evaluation process and consumers' eventual buying behaviour, it is imperative to distinguish between attribute types and also between the influences they exert on one another (Purohit & Srivastava, 2001:124). A simple view of attributes can be misleading and needs to be defined further. Cues indicate the product characteristics used as a baseline for evaluation; cues therefore convey information about the intensity of the valued characteristic. In the layman's terms, cues are pieces of information used by the consumer to evaluate a product (Connolly & Srivastava, 1995:220). For the purpose of this study we will be focusing on product cues that influence the product assortment evaluation process of a group of female consumers in an emerging market.

Apparel within a product assortment may have multiple cues, such as style, price and brand. The consumer uses all these cues simultaneously to evaluate a product as well as a product assortment; one cue may be more important than the other and drive the decision-making process. If the right style and right price is found but not the right brand, then the consumer may disregard the entire assortment. Connolly and Srivastava (1995:219) also found that, even when a multitude of product attributes is used to evaluate a product or make a purchasing decision, the cues are reliant on each other and are often viewed in conjunction with one another. This is typically the case when consumers associate quality with high prices. Product cues or attributes can be seen as a communication tool between the product and the consumer. According to Veale and Quester (2009), product attributes can be split into two groups, namely intrinsic and extrinsic attributes. Intrinsic cues are product attributes that are intrinsic to the actual product; this implies that should the attribute change, the product itself will be changed as well (Veale & Quester, 2009:195). The product assortment usually has intrinsic attributes such as colour, style and size. These intrinsic attributes cannot be changed without altering the product itself and changing the look and feel of the product. Extrinsic attributes are aspects that are related to the product but are not physically a part of it, such as name brands, price,

and country of origin. An extrinsic attribute is any product characteristic that can be changed without changing the use or core of the specific product (Veale & Quester, 2009:195). Generally, extrinsic attributes are used to state preferences, and they serve as a cue for product performance (Kauppinen-Raisanen & Luomala 2010:161).

Consumers place a large emphasis on extrinsic attributes in their product decisions since extrinsic attributes such as brand and price are directly linked to indicators such as quality and value (Teas & Argawal, 2000:278). Extrinsic attributes are used to analyse quality indicators when the consumer is not familiar with the intrinsic attributes, and vice versa. This shows that if consumers are not knowledgeable about the intrinsic attributes of a product (e.g. its style and textile qualities), they will rely on the extrinsic attributes (such as brand, price or country of origin) to make a purchasing decision (Zeithaml, 1988:9). According to Herpen and Pieters (2007), the extrinsic attributes of a product are then diagnostics for the unknown intrinsic attributes; this is especially true with the complex product assortments available at large department stores.

Most choice model frameworks are based on the principle that consumers will usually choose and rank one cue from a well-defined list of cues as the most significant (Bradlow & Rao, 2000:259). The cue diagnostic framework is used to assess the degree or predictive value of the product cues and components that are taken into account by consumers, such as those within the female emerging market consumer group, when evaluating the apparel product assortment of retailers. The cue diagnostic framework postulates that consumers will evaluate the apparel assortment through categorising which cues (information) are more important and which are less important, but also by considering how certain cues are used together to make a final decision (Connolly & Srivastava, 1995:220). These diagnostic cues are crucial links when creating a product assortment that fits a certain market group. They are the determinants used by consumers to evaluate and establish whether they are satisfied with the product assortment that is made available to them. By adding and combining the right perceptual intrinsic/extrinsic cues in product assortments; the consumers' overall anticipated identification costs (i.e. the costs of the process to establish the character of each alternative in the assortment) are lowered (Herpen & Pieters, 2007:86).

From the above, one can conclude that it is important to develop an understanding of how consumers identify and distinguish between different cue types, as well as how they use the diagnostic value to evaluate the product assortment (Herpen & Pieters, 2007; Purohit & Srivastava, 2001:124). The diagnostic framework provides researchers with a valuable insight into how this process can contribute to consumers' evaluation of apparel product assortments. This research will be of particular interest to retailers looking to increase their profitability by focusing their marketing strategies on product attributes that appeal to the emerging market consumer. From a theoretical perspective, this study will fill a gap in the literature pertaining to emerging markets by focusing specifically on South Africa and the emerging market consumer in the retail department store sector.

3.3   CONCEPTUAL FRAMEWORK

A conceptual framework is a tool used by researchers to categorize certain relationships between concepts as well as to understand and explain the theories applied in the research (De Vos, Strydom & Delport, 2011:35). Cues or product attributes can either be intrinsic (product attributes that are physically linked to the product) or extrinsic (product attributes that do not affect the physical make-up of the product) (Veale & Quester, 2009:95). When a consumer purchases an apparel product, she first identifies and analyses the intrinsic and extrinsic cues of the product assortment. Sometimes these cues/attributes can be influenced by previous experience or knowledge about the department store. Attributes or cues are dimensions of a product that define the consumption experience of the consumer (Smith & Deppa, 2009:28). The cues are integrated into a cognitive evaluation process, whereby the consumer measures each attribute to determine which attributes are more favourable than others. Some of the cues are used in combination with one another to determine whether the product assortment is favourable to the consumer. Based on the ranking of the cue, the consumer makes a final purchasing decision that either has a positive evaluation of the product assortment or a negative outcome.
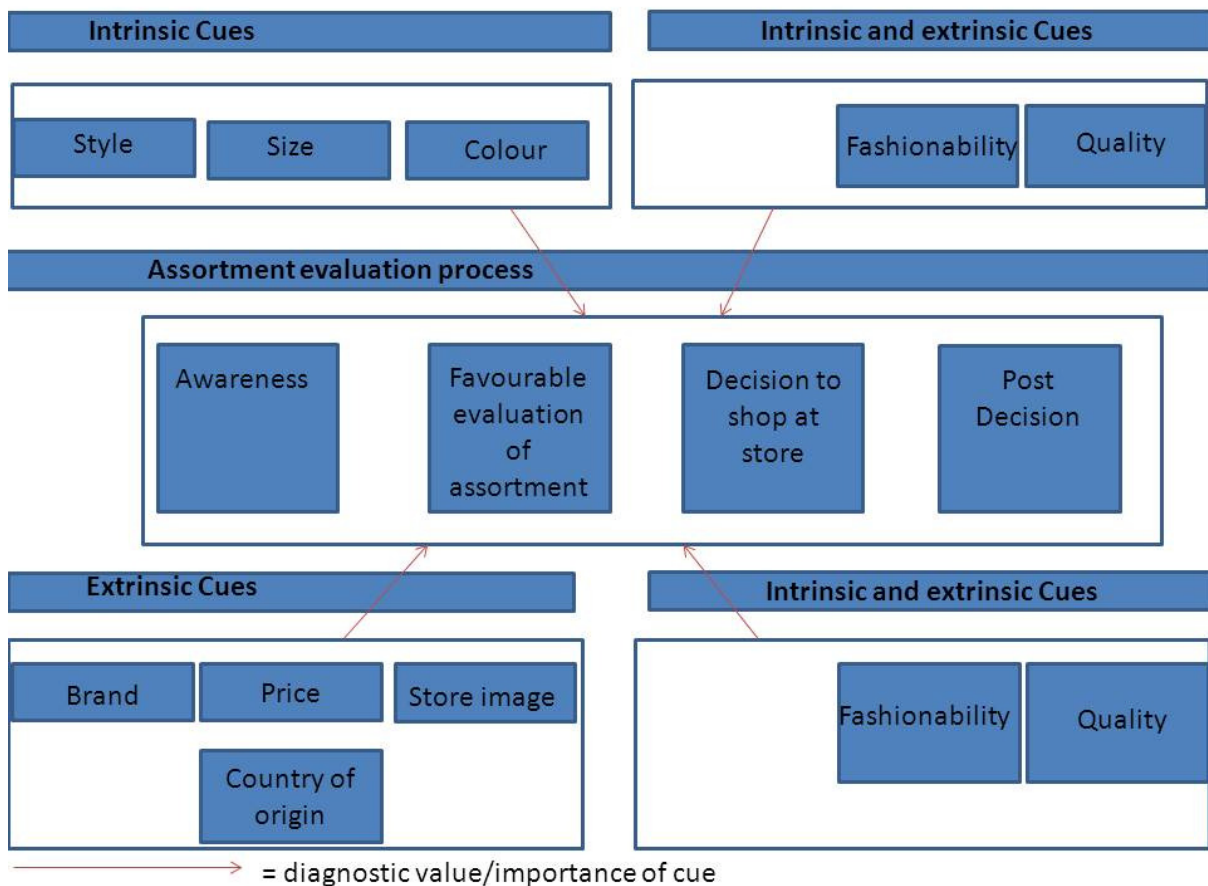
FIGURE 3.1: **CONCEPTUAL FRAMEWORK BASED ON CUE DIAGNOSTIC FRAMEWORK (SLOVIC & LICHTENSTEIN, 1971; CONNOLLY & SRIVASTAVA, 1995)**

From the above conceptual framework, it is evident that cues are used as a basis for the consumer to make a purchasing decision when evaluating product assortments within a department store. These cues were identified and analysed by a focus group of female consumers in an emerging market, and are the cues discussed in Chapter 2 of this research study. The cues utilized by the consumer to make this decision are categorized into two categories, namely intrinsic cues and extrinsic cues. Intrinsic cues form part of the product and will change the product if the cue is changed (Veale & Quester, 2009:195). The intrinsic cues used for this study are style, colour and size. Extrinsic cues are aspects that are related to the product but will not change the actual product (Veale & Quester, 2009:195). Extrinsic cues that were identified as being used by consumers to evaluate work wear assortments in department stores are price, brand, store image and country of origin. There are also cues that can be either intrinsic or extrinsic; the cues we have identified are

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fashionability and quality. The above cues are ranked by the consumer by identifying the relative importance of each attribute. Based on the importance of an attribute, the consumer then makes a purchasing decision according to how he or she evaluated the product. In view of the problems seen in the review of the relevant literature and the theoretical perspective, the following research objectives were formulated for the study:

3.4   OBJECTIVE 1

To explore and describe the relative importance of intrinsic cues (style, colour, and size) and dual cues (fashionability and quality) used by female consumers in an emerging market in their evaluation of department stores' work wear apparel product assortments.

3.5   OBJECTIVE 2

To explore and describe the relative importance of extrinsic cues (brand, price, store image and country of origin) and dual cues (fashionability and quality) used by female consumers in an emerging market in their evaluation of department stores' work wear apparel product assortments.

3.6   OBJECTIVE 3

To determine the priority ranking of specific identified diagnostic cues used by female consumers in an emerging market to evaluate the work wear product assortment in department stores.

3.7 CONCLUSION

This chapter explains the need for including a theoretical perspective in a study. The theoretical perspective chosen for the present study, the cue diagnostic framework (Slovic & Lichtenstein, 1971), was discussed and applied to this study. In order to answer the objectives in Chapter 1, and based on the conceptual framework above together with the definitions and the background to all the concepts that underpin the arguments about why the project is worth doing, Chapter 4 will explain the way in which the research was conducted to ensure that the research questions can be answered. Chapter 4 will include specific and practical descriptions of the research design, the purpose and approach that were used, a conceptualization and operationalization table that indicates the procedures for developing questions for the questionnaire, and also the methods used to ensure the validity and reliability of this study.

CHAPTER 4: RESEARCH METHODOLOGY

4.1   INTRODUCTION

This chapter presents the research methodology for this study and consists of the following sections: (1) Research design, purpose and approach; (2) Instrument development (conceptualization and operationalization); (3) Sample and sampling; (4) Data collection and analysis; (5) Ethical considerations; and (6) Conclusion. The research methodology provides a systematic and categorical approach or method for solving a research problem (Kumar, 2011:5). By using applied research methods and techniques, the researcher gives a step-by-step guide to how the data was gathered and analysed. The use and application of the conjoint data analysis technique in this study is therefore also discussed in detail. Measures taken to ensure the reliability and validity of the study are also specified in this chapter as well as the researcher's ethical considerations.

Research can be defined as "an inquiry into the nature of, reasons for, and the consequences of any particular set of circumstances whether these circumstances are experimentally controlled or recorded just as they occur" (Kumar, 2011: 5). Throughout this study the researcher aimed to gather more information and further the conjoint analysis technique in terms of consumers evaluation of product attributes within a work wear product assortment in retail department stores in order to provide more information for retailers and marketers catering for emerging markets.

4.2   RESEARCH DESIGN, PURPOSE AND APPROACH

The preparation of a research design is a very crucial step for research. It allows the researcher to communicate the intentions and importance of the research study (Kumar, 2011:30). The purpose of this study was to explore the diagnostic cues used by emerging market femaleconsumers when evaluating product assortments within

South African department stores. An exploratory survey research design was followed for this study in order to gain insight into how the emerging market female market consumer evaluate product assortments in South African department stores with a specific focus on work wear. Exploratory research was used to gain insight into the situation, phenomenon, community or individual (Fouché & De Vos, 2011:95). A quantitative research approach was followed and was used to answer the formulated questions about measured variables. This was used to explain, predict and control the research (Leedy & Ormrod, 2005:94). Quantitative research is based on a platform of the measurements of quantity or amount and data are generally formulated and communicated through numerical values (Kumar, 2011: 8). It can be described as a strategy within research that emphasizes quantification in the collection and analysis of data (Bryman & Bell, 2007:28). This approach allows the researcher to gather data through the use of numbers and statistical methods, which other researchers can replicate (King, Keohane & Verba, 1994:300).

The cross-sectional research approach followed is one which collects data about various components of a sample at a specific point in time to uncover whether there are relationships among the components that were tested (Kumar, 2011:10). Thus the product attributes of a work wear product assortment preferred by female emerging consumers were measured in a specific point in time. The most prominent advantage of a cross sectional research design is that it provides researchers with a consistent benchmark to make the data measured quantifiable, through the use of a systematic and standardized method (Bryman & Bell, 2007:55). A quantitative research method named conjoint analysis was best suited for this research study.

4.3   SAMPLE, SAMPLING AND PROCEDURE

The social indicators of South African society reflect its history of social and political 'caste formation', the changing alliances of politically privileged groups and the reforms which were intended to forestall the challenges to white hegemony, as well as an economy which is a late-starter in the race for global competitiveness (Schlemmer & Moller, 1997:20). The above school of thought indicates that emerging markets can be very profitable and unique if catered for correctly. In order for

department stores to benefit from this market group, extensive research needs to be conducted with regard to the diagnostic cues that satisfy this untapped market's needs in terms of product assortment in the fashion retail sector. A renewed interest has developed in the emerging market femalemarket for consumers in developing countries and this can be seen as the new 'cash cow' for retailers. The emerging market femalemarket consumer was therefore specified as the unit of analysis for this study

The emerging market female(market) consumer group can be described as a relatively unknown segment that has only really emerged during the last ten years. According to a research survey conducted by the research company Mictert, the emerging black market was initially described as young black professionals with an approximate earning power of R8000 who do not live in townships and are employed in white collar positions (Mictert, 2005). The nature of this emerging market in South Africa is constantly changing and new press releases from Mictert now also indicate that young professionals between 25 and 39 who work full or part–time, have some tertiary qualification and fall in the living standards that measure an LSM of 7 or higher can also be included in the description of an emerging market. Based on the above information, a set criteria was identified for this research study to ensure that the correct market was being measured within South Africa

A non-probability sampling method was used for this study whereby some members of the population have little or no chance of being sampled (Leedy & Ormrod, 2001:206). In adopting a purposive approach, specific respondents were chosen for a specific purpose and from a specific group when the research was conducted (Strydom, 2011:232). A snowball sampling technique was used in combination with the purposive sampling technique. Snowball sampling approaches a solitary respondent or informant who fits the descriptions and characteristics of the phenomenon being investigated (Strydom, 2011:233). The snowball sampling technique was used by identifying respondents in the female emerging market category and asking them to give contact details of their friends and family who fall into a similar category group. Social media platforms like LinkedIn and Facebook were used to allow respondents to forward contact details of their friends and family.

Respondents identified and targeted for this research were female and between the ages of 20 and 60. Female respondents were seen as an appropriate target group because women still typically control the household finances as well the main shopping for the household (Coca Cola retailing council, 2010:8). These respondents were chosen and selected based on a set criteria of demographic elements; namely, race, age, income, education and location. At the Cola Cola retailing council (2010) it was suggested that there is no one definition for emerging markets but rather that an emerging market is a place where people who were in the mind-set that their daily existence could not improve now believe that the future could be better than the past (Coca Cola retailing council, 2010). Another study conducted by Mictert (2005) used the criteria of age, income, education and location to define emerging markets. The information gathered was used as a platform to determine the set criteria for this research study. The sample was based on respondents in a work environment or with training and a degree and with access to the internet. The Coca Cola retailing council (2010) found that the emerging market consumer is sophisticated about internet access and the use of mobile phones. By using this referral method it was possible to identify an adequate sample for the study. The respondents who were chosen represented the emerging market femalemarket consumer group in South Africa

The size of an adequate sample depends on how homogeneous or heterogeneous the population is, and how alike or different its members are with respect to the characteristics of research interest (Leedy & Ormrod, 2005:207). In order for the inferences drawn from this sample to be valid, two factors need to be addressed. Firstly the size of the sample needs to be large enough to make sure the findings are accurate and secondly the sample needs to be homogenous to ensure accurate sampling (Kumar, 2010:197). Hair *et al.* (2006) found that a researcher would generally not factor a sample size of 50 or less, so the sample size should preferably be 100 respondents or more. Due to the nature of the study (conjoint analysis) a sample of 121 was deemed to give a reliable and accurate data analysis. The sample size of the research is an adequate representation of the female emerging market in South Africa. For the purposes of this study the researcher used 121 respondents for the study to gain a reliable insight into the preferences of the emerging market femalemarket consumer. The questionnaires were gathered over an estimation period of four months in 2011 and 2012.

4.4 INSTRUMENT DEVELOPMENT

This study aimed to gain insight into the cues/product attributes used to accurately portray the evaluation and preferences of the female emerging market through testing how the above variables relate to one another (Kumar, 2011:3). Through conjoint analysis, it can be seen that consumers portray decisions realistically as trade-offs among multiple attributes. The conjoint analysis approach made its first appearance in the literature during the 1970s, when attributes were measured by looking at a consumer's judgement of a set of complex alternatives in more developed markets (Jaeger, Hedderley & Macfie, 2000:1217). However, limited research has been conducted into how consumers in emerging markets evaluate the different attributes of product assortments within the retail sector. More focus was placed on how consumers in general view a bundle of attributes as opposed to how specifically focused target consumer groups would evaluate a product assortment in a specific country, demographic group or income group. This research reported on how the emerging market female consumer group made use of diagnostic cues to evaluate work wear within a department store's product assortment.

4.5 CONJOINT ANALYSIS OVERVIEW

Conjoint analysis is a technique that allows for the evaluation of complex products and processes while still maintaining a realistic decision framework for the respondents (Hair *et al.*, 2006:19). Conjoint analysis is based on the simple premise that consumers will evaluate the value of a product assortment by combining the value of all the individual product attributes used when making a purchasing decision (Hair *et al.,* 2006:410). Conjoint analysis has become an increasingly popular technique in quantitative marketing research. It is used to measure the perceived values of specific product features, to learn how demand for a particular product or service is related to price, and to forecast what the likely acceptance of the product would be if brought to the market.

Conjoint analysis is described by Hair *et al.* (2006) as a multivariate technique specifically developed to gain insight into how consumers develop preferences for products or within a product assortment. Green *et al.* (2001) summarised conjoint analysis as the everyday decisions of consumers in the retail market place. Conjoint analysis is used as a technique for measuring trade-offs and analysing responses about preferences to buy a specific product. All this information is used to simulate how consumers will react to changes in the market through the introduction of new products or changes to the existing product assortment (Green *et al.*, 2001: 55). Conjoint analysis is based on two central themes, utilities and preference shares. Utilities can be described as two fold namely numerical utilities or part-worth utilities. Utilities are used to measure the predicted preference level of consumers. Preference structure is best described as a measure of how consumers select certain products within different market situations.

A variety of conjoint analysis methods exist within which the preferences of respondents can be analysed. Hair *et al.* (2006) identified three main methodologies, namely traditional, adaptive or hybrid and choice-based conjoint analysis (Hair *et al.,* 2006). These techniques all follow the same method of gaining insight into the respondents' preference structure across multi-attribute alternatives, despite the fact that they differ in terms of design and data analysis (Hair *et al.*, 2006; Alriksson & Öberg, 2008). The attributes used in a conjoint analysis can be seen as hypothetical as the researcher identifies the attributes and the levels for each attribute before the research study is conducted (Hair *et al.*, 2006; Alriksson & Öberg, 2008). The respondents' overall rating of the hypothetical attributes and their levels is then directly translated as the respondents' overall preference towards a product or product assortment (Hair *et al.*, 2006). Conjoint analysis is therefore classified as a decompositional method, since respondents' preference structures are derived from their assessment of hypothetical products or product assortments consisting of a combination of attributes and levels, whereas compositional multivariate models such as regression and discriminant analysis develop overall preference and predictive models based on respondents' assessment/ rating of the importance of individual poduct attributes i.e. detached from a particular product/ assortment combination (Hair *et al.*, 2006; Alriksson & Öberg, 2008).

To completely understand conjoint analysis, some specific key terms need to be addressed and defined:

- **Factor**: is a term used to describe specific attributes of a product (Hair *et al.*, 2006:463). Within conjoint analysis terminology, attributes can be referred to as factors.
- **Part-worth**: "Estimate from conjoint analysis of the overall preference or utility associated with each level of each factor used to define the product or service" (Hair *et al.*, 2006:463).
- **Utility**: "An individual's subjective preference judgment representing the holistic value or worth of a specific design" (Hair *et al.*, 2006:464).
- **Level**: is a specific value that describes an attribute (Hair *et al.*, 2006:463).
- **Preference Structure**: A representation of the value of each factor and the impact of individual levels in affecting the utility (Hair *et al.*, 2006:464)
- **Conjoint task**: "The procedure for gathering judgments on each profile in the conjoint design using one of the three types of presentation methods (i.e., full profile, pairwise comparison or trade off)" (Hair *et al.*, 2006:462).
- **Relative attribute importance**: The relative importance attached to attributes (Orme, 2010:79) depending on the range of minimum and maximum utility levels of attributes.

4.5.1 Basic steps in conjoint design

The initial design of a conjoint study is critical to the success of the overall research project. Churchill and Lacobucci (2002:754) present a six stage model which provides a step-by-step guide for the design of a conjoint study. Each step is discussed in detail below as it applies to the development of the conjoint tasks for this particular study.
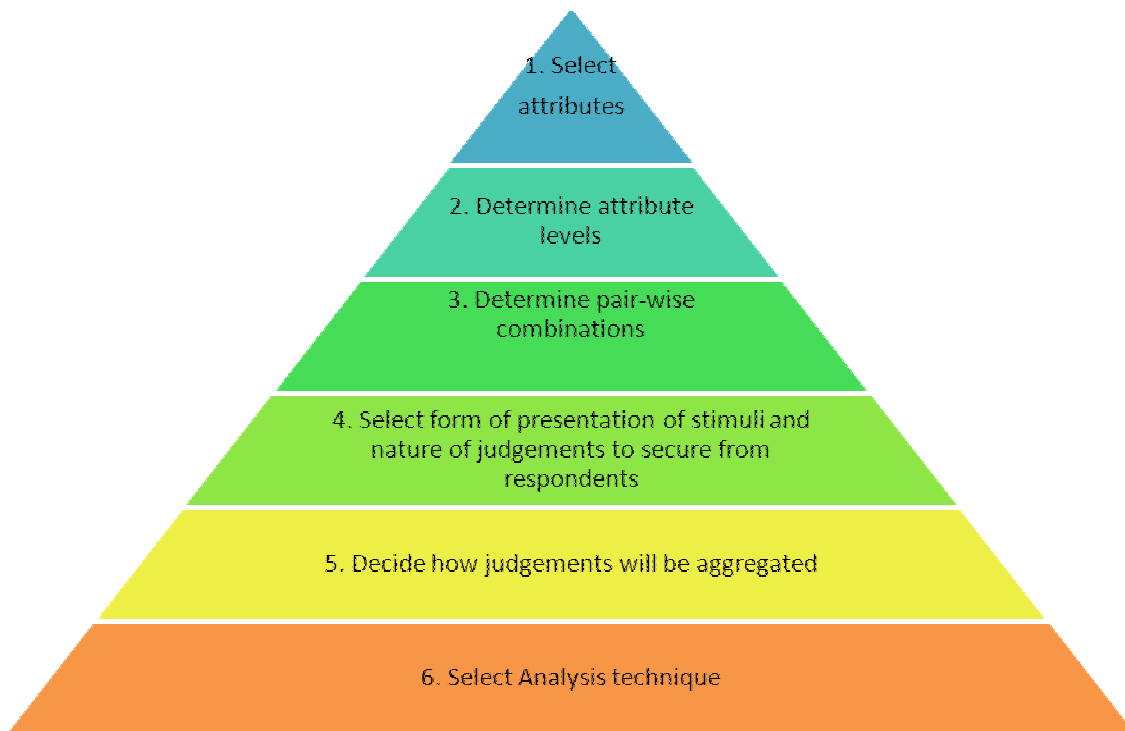
FIGURE 4.1:   STEPS WHEN CONDUCTING A CONJOINT ANALYSIS DESIGN. (ADAPTED FROM CHURCHILL & LACOBUCCI, 2002:753)

Step 1 and 2: Selecting attributes of the work wear product assortment and specifying the attribute levels

Design decisions pertaining to the attributes and levels that will be included in the conjoint tasks are extremely important as they affect the accuracy of the results and ultimately the relevance of the study (Hair *et al.*, 2006:423). Firstly, attributes should be communicable and realistic. As an example, attributes such as store image and colour are difficult to communicate with accuracy, since each respondent will have a different interpretation of what a colour or store image constitutes. Through focus group discussion with emerging market femaleconsumers, attributes which they deemed important when purchasing work wear were identified and narrowed down. It was important to consider the length and complexity of the questionnaire in terms of the amount of conjoint tasks to be included and therefore careful consideration was given to the relevance of each specific attribute. Focus group discussions and the verification of attributes/cues/levels that were eventually included in the conjoint tasks were guided by the following questions:

- What are the most important attributes that the emerging market female consumer will consider in the evaluation process of a product assortment in a department store?
- How will the respondent know the meaning of each attribute?
- Are the levels specified for each attribute clear and comprehensible?
- Is the researcher asking the correct questions to measure what needs to be evaluated?
- Are all the pair-wise profiles included in the study relevant?

Each attribute and level that was identified in the focus groups was discussed in the group to clarify the most important attributes and levels. The product assortment attributes were narrowed down to key factors based on intrinsic and extrinsic product cues, namely, brands, perceived quality, colour, store image, price, size, store name, country of origin, fashionability and style. An average of three or more levels was added to each key factor to create the different assortment offerings. From the figure below it is clear that some of the attributes had more levels than others. Research has shown that the number of levels populated from profiles all have distinct influences on the evaluation of the data (Hair *et al.*, 2006:445). It became apparent that certain attributes were more influential than others. One of the attributes identified was price. Price is an attribute that is often included in conjoint analysis studies because it represents a distinct element of value for many research studies (Hair *et al.*, 2006:425). From the work with the focus groups it was shown that price will interact with other attributes such as brand and quality. Due the interactive impact price has on evaluating assortment, it was included in the choice task design. Table 4.1 illustrates what were identified as being the most important attributes or factors when evaluating a product assortment.

TABLE 4.1: ATTRIBUTES SELECTED FROM THE FOCUS GROUP

Attribute 1	Attribute 2	Attribute 3	Attribute 4	Attribute 5	Attribute 6	Attribute 7	Attribute 8
Style	Colour	Size	Price	Brand	Functional quality	Store image	Store name

Once the attributes were determined, their levels had to be specified. When selecting attribute levels it is very important that a realistic approach is followed to make sure that the levels are a true reflection of the attributes that emerging market consumers use in their evaluation of work wear. The identified attribute levels had to be easy to understand, transmittable, practical and capable of being traded off against one another (Hair *et al.*, 2006: 480). The focus group discussions contributed to the identification of specific levels as follows:

Style: Five levels were identified including classic, trendy, tailored, casual and variety of styles.

Colour: Five levels were identified for colour including neutral, bright, seasonal, and muted and earth colours.

Size: Four levels were identified for size namely standard and petite sizes, standard and plus sizes, standard sizes, plus and petite sizes.

Price: When determining the price levels it is important to ensure that the levels are kept manageable and easy for the respondents to read. The price levels selected for this study were translated into a minimum to a maximum price range to make it easy for the respondent to relate to. Three price levels were identified: low to moderate prices, moderate to expensive prices and expensive to very expensive prices.

Brand: Three levels were identified for brand, namely in store brands, designer brands as well as a combination of, designer and in store brands.

Quality: Three levels were identified for quality, including easy care, well made and durable.

Store image: Six levels were identified for store image namely discount, convenience, exclusive, quality, value oriented and fashionable.

Store name: Six levels of department stores were identified namely Edgars, Truworths, Woolworths, Stuttafords, Ackermans and Pep.

Based on the input received from the focus group discussions, a choice set matrix was developed on a software programme to plot the attributes (different dimensions of a cue) and levels (different indicators of each cue). The choice set matrix consisted of 35 cells which included eight attributes with different levels for each attribute. Each attribute did not have an equal number of levels but only levels that were appropriate and relevant to the attribute.

Table 4.2 illustrates the choice set matrix, which was crucial to the next step in the conjoint design.

TABLE 4.2: MATRIX WITH ASSORTMENT ATTRIBUTES AND LEVELS

	Attribute 1 Style	Attribute 2 Colour	Attribute 3 Size	Attribute 4 Price perception	Attribute 5 Brand	Attribute 6 Quality	Attribute 7 Store image	Attribute 8 Store name
Level 1	Classic Styles	Neutral Colours	Standard and petite sizes	Low to Moderate prices	In store and designer Brands	Easy Care	Discount	Edgars
Level 2	Trendy Styles	Bright Colours	Standard and plus sizes	Moderate to expensive prices	Designer Brands	Well made	Convenience	Woolworths
Level 3	Tailored Styles	Seasonal Colours	Standard sizes	Expensive to very expensive prices	In store brands	Durable	Exclusive	Truworths
Level 4	Variety of Styles	Muted Pastel Colours	Standard, Plus and petite sizes				Quality	Ackermans
Level 5	Casual Styles	Earth Tones					Value oriented	Pep
Level 6							Fashionable	Stuttafords

Written descriptions, as specified in Table 4.2 can often be misleading and do not capture the true essence or meaning of specific levels. To avoid misinterpretation, the images for each level were designed to give the respondent a visual picture of the combination of attribute levels that would be communicated in each of the conjoint tasks. Images were designed and developed by a graphic designer to communicate the levels for each attribute in the best way, making it easier for respondents to process and familiarize themselves with the levels and conjoint tasks they were presented with. Conjoint tasks should be actionable (Hair et al., 2006:464)

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and therefore, each attribute and attribute level were precisely defined by adding a definition list to the questionnaire to make sure that respondents understood the content of each conjoint task (Hair *et al.*, 2006:464).

Step 3 and 4: Compiling the conjoint tasks and selecting the method of presentation

In this phase of the conjoint design, the attributes with their levels, which were specified in the choice set matrix, were used to create combinations/ profiles that would form the basis of the conjoint tasks for the questionnaire. Profiles for the conjoint tasks were developed by using a software programme called Sawtooth Software©. Consulta (a research consulting company) was approached to help with development of the profiles since the University of Pretoria did not have the Sawtooth Software©. The CVA system within Sawtooth Software©, which is a complete software package for traditional full-profile conjoint analysis, was used for these purposes. The CVA system generates full profile hypothetical product concepts. The term 'full profiles' can be explained as product concepts that include all product attributes being studied (Sawtooth Software© Inc., 2002), which implies that the product assortment profiles created for this study were described in terms of all of the attributes specified in the choice set matrix; i.e. each product assortment profile was specified in terms of style, colour, size, price, brands, quality, store name and store image. For each profile, the attributes however differed with regard to the levels.

The aim of using a CVA software tool is to determine what product changes would maximize the likelihood that respondents would prefer a specific product or in the case of this research product assortment over another. Table 4.3 is an example of what the generated profiles look like.

TABLE 4.3: SAWTOOTH SOFTWARE © GENERATED PROFILES

Task	1	1
Concept	1	2
Att 1 - Style	Casual Styles	Trendy Styles
Att 2 - Colour	Neutral Colours	Seasonal Colours
Att 3 - Size	Standard and petite sizes	Standard sizes
Att 4 - Price perception	Low to Moderate prices	Expensive to very expensive prices
Att 5 - Brand	In store and designer Brands	Designer Brands
Att 6 - Functional quality	Easy Care	Well made
Att 7 - Store Image	Value oriented	Convenience
Att 8 - Store name	Stuttafords	Woolworths

The images designed for each attribute level were then incorporated into the profiles (see Figure 4.2) to create a visual simulation of product assortment. CVA software has two options in presenting the stimuli (i.e. profiles) in a conjoint task, namely single concept full profile designs or pair wise full profile presentation. For this study, a pair wise full profile presentation method was used. This involved a comparison between two sets of profiles including levels of each attribute (see Figure 4.2) whereby the respondents then used a rating scale to indicate their preference for one of the hypothetical scenarios (Hair *et al.*, 2006: 432). A nine point scale was used, where 1 indicated a strong preference for the left option and 9 a strong preference for the right option. Pair wise presentations can seem more complex to respondents as they require the evaluation of more than one profile at one time. They do, however, have an advantage of making finer distinctions between products and their features, which is not always possible with single concept presentations

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
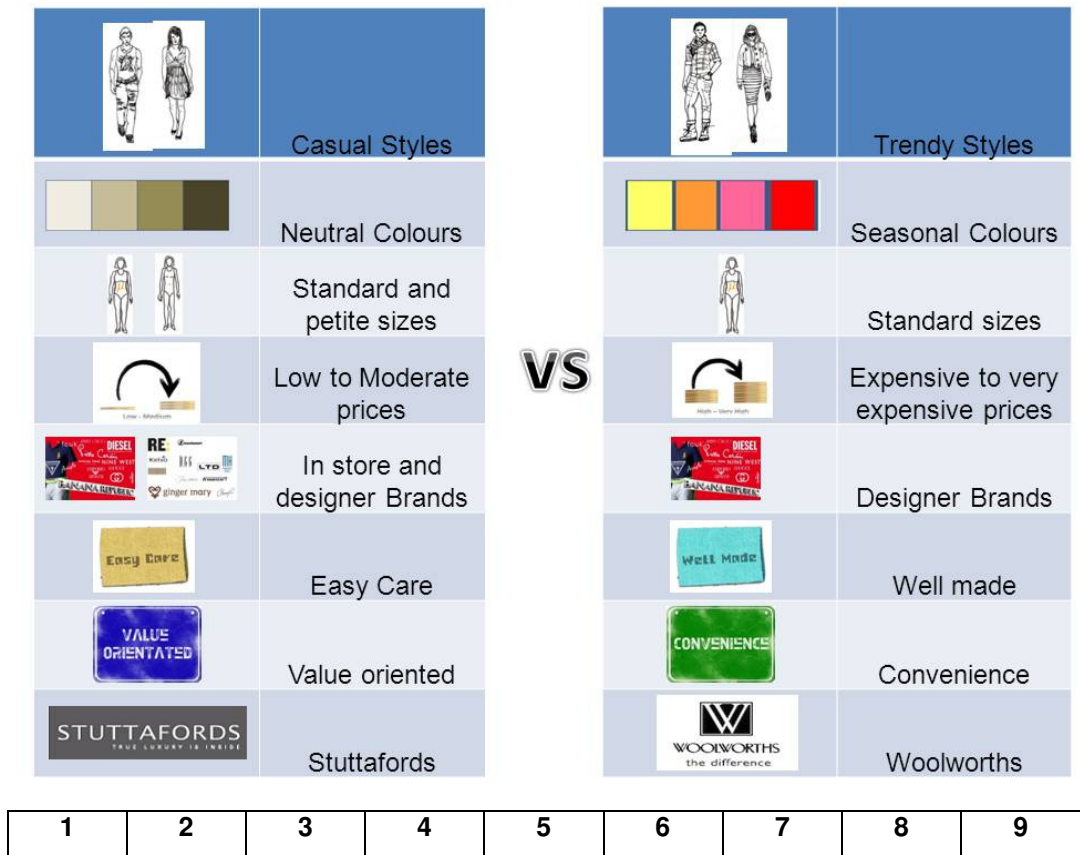
FIGURE 4.2:   PAIR-WISE PROFILES

Once the attributes were identified and the levels were assumed within the attributes, a CVA design was generated. The CVA design was used to specify the combination of attribute levels for each conjoint question (Sawtooth Software© Inc., 2002). CVA software relies on a D-efficiency measure to assess the goodness of a conjoint design in terms of orthogonality and balance. The orthogonality of a conjoint design relates to the zero correlation between pairs of attributes. A level balance is achieved if each level of an attribute is shown an equal number of times (Sawtooth Software© Inc., 2002). Within the Sawtooth Software©, CVA generates a tool that will guarantee a well-balanced 'nearly-orthogonal' design. This design is used to generate a set of conjoint questions based on the premise that for each attribute a pair of random levels will be selected from permitted pairs that have been presented the fewest times. No pair of levels can be repeated until all permitted levels have been shown. This process ensures that each pair of levels will be shown an equal number of times, and each level from one attribute is equally likely to be shown with any level from another attribute (Sawtooth Software© Inc., 2002). Based on this, a final set of 35 questions were computed for this study.

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Step 5 and 6: Determine method for analysis and conjoint analysis technique

A key benefit in conjoint analysis is the ability to represent many types of relationships of the conjoint analysis variants (Hair *et al.*, 2006: 471).The very first step in conjoint analysis is to determine average part-worth utilities for each attribute level of the sample. Each part-worth utility reflects the value that each respondent allocates to the pair wise scenarios that are shown to them and this thus forms the back bone of the entire study. Researchers can use three methods to analyse this data. Firstly they can use individual responses and group all responses into a single utility function or group segments of respondents with similar preferences. For the purpose of this research, the conjoint data was interpreted and presented on an aggregate level and therefore average importance of attributes and utility values of attribute levels are based on the responses of the entire sample as opposed to particular segments of the sample and/ or individual respondents. Regression analysis was used on each respondent separately to determine their utility values. We performed a scale transformation on the individual utilities, calculated the mean and standard deviation within each level to summarise the utilities for every level of each attribute. The importance was based on the difference between the maximum and minimum utility of all the levels for a specific attribute for each person.

4.5.2 Conjoint analysis online questionnaire

A structured self-administered, online questionnaire was developed with the use of existing scales and with the conjoint analysis method in mind. A total of 35 pair-wise profiles (see Addendum A) were included in the questionnaire. A questionnaire is mainly used to gain two types of answers namely facts; information of which respondents have knowledge and opinions; expressions of attitudes or preference (Thomas, 2003:67). Questionnaires were used for this research based on the following:

- Questionnaires ensure a high response rate and were returned to the researcher through an online hosting website.
- They require minimal time and maintenance to administer.
- Respondents were not asked to reveal any personal information therefore anonymity was guaranteed. There was an option of leaving a phone number to be included in the lucky draw.

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The questionnaire used for this research study consisted of 46 questions. Among the 46 questions, 8 were allocated to identify the general demographic information of respondents. The remainder were based on hypothetical pair wise combinations of assortment offerings in hypothetical department stores. As mentioned previously, images were developed to communicate each profile more accurately to respondents. Relevant images were developed in conjunction with a graphic designer to communicate each attribute to respondents and make the questionnaire easier to read, understand and identify attributes. Please refer to <u>Addendum A</u> to view the images used to communicate each attribute. The researcher also alternated the conjoint tasks with short demographic scale items in an effort to reduce respondent fatigue. The full questionnaire can be viewed as <u>Addendum A.</u> The questionnaire consisted of 5 sections:

Section 1: This was a consent section where the respondents gave their consent that they were willingly taking part in the research study and not being forced against their will.

Section 2: This section summarised a description of attribute levels with corresponding images to ensure that the respondents were clear about every term used within the questionnaire.

Section 3: This section consisted of pairwise profiles with images of intrinsic and extrinsic attributes. Respondents were asked to rate the pairwise profiles on a scale of 1-9.

Section 4: This section was a set of demographic questions about the respondents' age, income, degree level and ethnicity.

Section 5: This section was used to ask the respondents multiple choice questions about specific attributes for example the country of origin of the apparel, the fashionability of stores and store preference names.

In Questions 2-11, 15-25, 29-34 and 36-45, respondents were presented with a set of pair-wise profiles and asked to indicate the option they most preferred on a scale of 1-9. This section was the baseline for the study and forced the respondents to make trade-offs between pairs of grouped attributes. Each pair-wise description had 8 attribute levels (Table 4.5) and respondents were asked which profile they preferred most. Through the use of the 9 point rating scale the researchers were able to gather a preference evaluation of the product assortment in department stores. By using the paired comparison format, researchers can draw closer distinctions between product

assortment offerings and product features. It is important to note that a pair-wise questionnaire only captures the relative difference respondents have in preference levels for attributes. Using questionnaires as a data collection method has several advantages which include the following: a) the researcher is able to gather a large quantity of data in a short time and b) data can be collected from people in distant places through the use of mail and internet, as is the case with this research (Thomas, 2003:68). The most common disadvantage of questionnaires is that pre-coded questionnaires frustrate respondents and deter them from answering the questions thoroughly and with honest answers (Denscombe, 2010:170). Limitations such as the likelihood of respondents filling in completed questionnaires were overcome by the use of security settings on the online questionnaires. Once a questionnaire was initiated, it had to be completed in full to move on to the next question (Thomas, 2003:69). Data was collected over a period of four months. At the end of this time a total number of 121 usable questionnaires were received from respondents.

4.5.3 Pretesting of the instrument

The pilot test was sent to the work colleagues and friends of the researcher via e-mail, who were asked to respond with feedback with regard to the questionnaires they filled in. A pilot test was conducted to clarify any language errors, to eliminate any confusing questions, to increase reliability and to determine if the images were effective. Pilot testing is imperative for CVA conjoint designs because it helps to determine the effectiveness of a questionnaire and indicates which aspects need to be revised before use as a final data collection unit in a study (Strydom, 2011:241-242). The pilot test also gave the researcher a good indication of whether the time frame for the questionnaire was realistic and usable. Very often the advantages and disadvantages of a questionnaire go hand in hand. The researcher also aimed at testing the clarity of the concepts from the questionnaire in order to enhance the validity of the measurements.

This pilot was conducted by identifying 10 respondents and sending the online questionnaire survey to them via e-mail. Ten respondents were deemed an adequate amount for pilot testing and this gave the researcher sufficient feedback about the questionnaire. Respondents were asked to comment on how easy the questionnaire

was to read and understand. They all came back with positive feedback; although some felt it could be shorter. The length of the questionnaire would, however, not deter them from filling it in or affect the way they answered the questions. Respondents were also asked to comment on the time it took to complete. A trial run of the results was also analysed and discussed with statisticians to determine if the results could be analysed in a meaningful way and to ascertain whether changes were required for easier analysis.

4.5.4 Data collection procedure

Web-based questionnaires are currently the most user-friendly and flexible method to demonstrate questionnaires through the use of images and even video to help communicate the questionnaire clearly (Kahn, 2004:279). A structured, electronic self-administered questionnaire was circulated to specific and identified respondents through the use of an online survey website. The most obvious advantage of using online questionnaires is that researchers do not incur the costs of paper, printing and postage. Online questionnaires also have the potential to gather large amounts of data in a relatively short timeframe. The biggest advantage of online questionnaires is that results can be gathered and analysed through a software programme so that analysis can start immediately after the data collection phase has ended (Katsirikou & Skiadas, 2010:293), shortening the time in which research can be conducted without compromising the reliability and validity of the data. Quantitative, primary data collection methods often use measuring instruments such as questionnaires, checklists, indexes and scales to obtain data from respondents (Delport & Roestenburg, 2011:178-181). Questions were explicitly designed and developed for the use of the above research. Respondents were notified of the online questionnaire through the use of e-mail and social networking sites like Facebook and LinkedIn.

4.6 DATA ANALYSIS

In general, the selection of a particular method for analysis in conjoint studies depends on the data structure (i.e. whether it is measured on an interval or ordinal scale) and the underlying statistical model. Conjoint analysis methods are assessed at two levels, namely disaggregate and aggregate levels (Hair *et al.*, 2006:442). The aim in both instances is to determine how consistently the estimated model represents the preference evaluation of respondents (Hair *et al.*, 2006:447). For the purposes of this study, the average importance of attributes and utility values for specific levels were predominantly analysed on an aggregate level. As has been pointed out by Hair *et al.* (2006:501) one of the benefits of conjoint analysis is that it has fewer statistical assumptions associated with the model estimation. The average R-squared is the most general goodness of fit measure for conjoint analyis models and anything above 0.80 can be described as a good fit. In this study, estimations were based on the responses of 121 individuals, each performing 46 choice tasks. The average R-squared goodness of fit measure for this study was 0.963 which indicated a very good fit.

The University of Pretoria's Department of Statistics assisted with the analysis of the conjoint data and simulated the Sawtooth Software© CVA ware output by means of the following statistical procedures:

Short description of procedure

Regression analysis was used for each respondent separately to determine their utility values. The dependent variable was the recoded response to the conjoint questions and the explanatory variables were the profile created for each conjoint question. A restriction was imposed that the partial regression coefficients within an attribute should add up to zero. A scale transformation on the individual utilities was performed and calculated the mean and standard deviation within each level to summarise the utilities for every level of each attribute. The importance was based on the difference between the maximum and minimum utility of all the levels for a specific attribute for each person. This was converted to a percentage. The average

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and standard deviation were calculated for the whole sample as a summary of the importance.

Step 1: Create a profile for each conjoint question in the questionnaire. The coding is as follows:

-1   if the level appears on the left hand side of the question
+1   if the level appears on the right hand side of the question
 0   If the level does not appear in the question

For example:
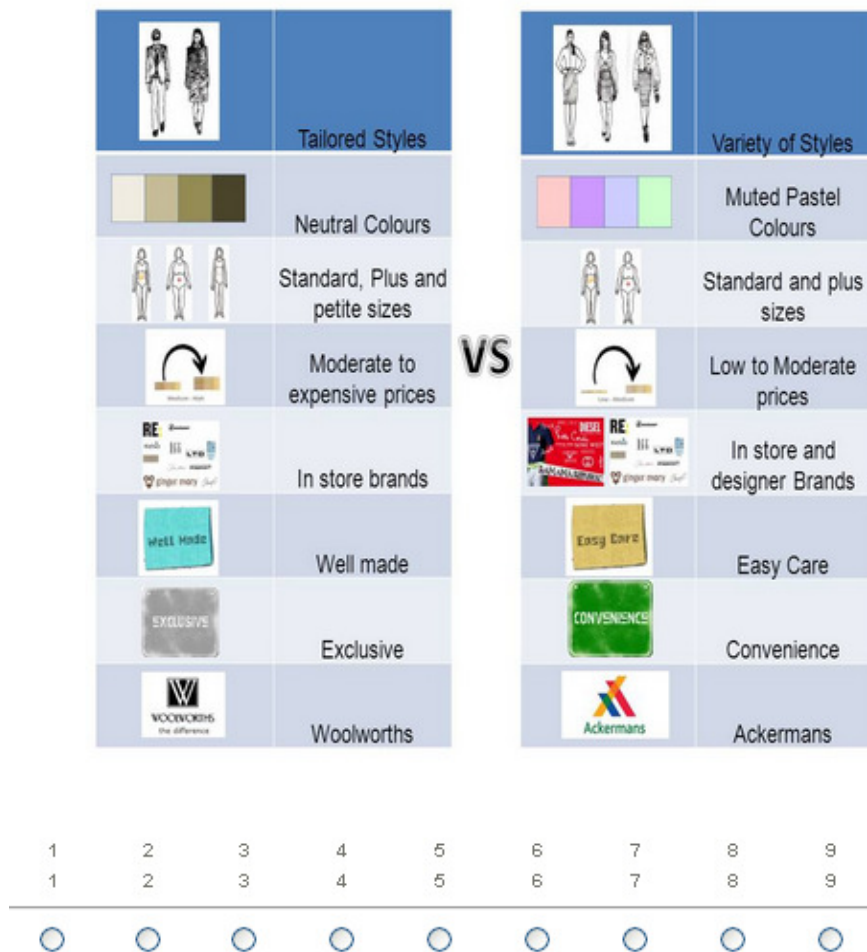
FIGURE 4.3:   EXAMPLE OF PAIRWISE PROFILES

Therefore the profile for these questions will be:

	Style					Colours					Size				Price			Brand			Care			Image						Store					
	Casual	Classic	Tailor	Trendy	Varied	Bright	Earth	Neutral	Pastel	Season	SM	SML	M	ML	LtoM	MtoH	HtoVH	Store	SandD	Designer	Durable	EasyCare	WellMade	Convenience	Discount	Exclusive	Fashion	Quality	Value	Ackermans	Edgars	Pep	Stutts	Truworths	Woolies
Q2	0	0	-1	0	1	0	0	-1	1	0	0	-1	0	1	1	-1	0	-1	1	0	0	1	-1	1	0	-1	0	0	0	1	0	0	0	0	-1

FIGURE 4.4: EXAMPLE OF ATTRIBUTES AND ATTRIBUTE LEVELS

The profile consists of 8 attributes with a total of 35 levels.

Step 2: Recode responses.

Respondents scored their preferences on a scale of 1 to 9. Subtract 5 from each observation, so that the scoring is from -4 (prefer left option) to +4 (prefer right option).

Step 3: Carry out a regression for each person separately.

The dependent variable will be the response to the conjoint question. (This will then be a value between -4 and +4. See step 2.)

The explanatory variable will be the profile for the questions as created in step 1.

Place a restriction so that the levels of each attribute sums to 0.

The partial regression coefficients obtained from the regression analysis are the utilities. (Ignore the intercept)

Step 4: Scale the utilities

Based on the number of levels and the maximum and minimum value for each level, each utility is multiplied with a constant.

Step 5: Determine the average and standard deviation.

Calculate the average and standard deviation of each level of each attribute for the whole sample.

Summarise this in terms of the utilities.

Note that you can only compare levels within an attribute and not across attributes.

Step 6: Determine the importance of the different attributes.

Take note: The importance is influenced by the number of levels of the attribute. For example, an attribute with more levels will most probably come out as being more important.

   (a) Calculate the difference between the maximum and minimum utility of all the levels for a specific attribute separately for each person.
   (b) Convert (a) to a percentage.
   (c) Calculate the average and standard deviation for each attribute and summarise this as the importance.

All the relevant attributes/cues/levels were conceptualised and broken down into dimensions and indicators for each cue. Table 4.4 provides a summary of all the objectives, sub-objectives, category, dimensions, indicators and the conjoint task of each of the objectives within the research study.

TABLE 4.3: CONCEPTUALISATION AND OPERATIONALISATION

Objectives	Sub-objectives	Category	Dimensions	Indicators	Conjoint tasks /Items
Objective 1: To explore and describe the relative importance of intrinsic cues (style, colour, and size) and dual cues (fashionability and quality) used by female consumers in an emerging market in their evaluation of department stores' work wear apparel product assortments.	To explore the diagnostic value of intrinsic cues (e.g. colour/style) used by the emerging market female consumer group in their evaluation of apparel product assortments within department stores in South Africa	Intrinsic cues (Information used as basis for evaluation)	Style Colour Size Fashionability Functional quality	• Style: Classic, trendy, tailored, variety and casual. • Colour: Neutral, bright, muted, seasonal, earth • Size: (standard and petite) (standard and plus) (standard) and (standard, plus and petite) • Fashionability; fashionable, classic, modern, stylish and elegant • Functional: durability, easy care, well made	A variety of pairwise assortment scenarios were created with Sawtooth© and given to respondents to evaluate and choose the variety of product assortments most favourable.
Objective 2: To explore and describe the relative importance of extrinsic cues (brand, price, store image and country of origin) and dual cues (fashionability and quality) used by female consumers in an emerging market in their evaluation of department stores' work wear apparel product assortments.	To explore the diagnostic value of extrinsic cues (e.g. brand/price) used by the emerging market female consumer group in their evaluation of apparel product assortments within department stores in South Africa	Extrinsic cues (Information used as basis for evaluation)	Brand Price Store Image Country of Origin Perceived quality Fashionability	• Brand: (In store and designer brands), (designer brands), and (In store brands). • Price: (Low to moderate), (moderate to expensive) and (expensive to very expensive). • Store Image: Discount, convenience, exclusiveness, quality, value oriented and fashionable. • Country of origin: Made in China, Made in Europe or Proudly South African. • Perceived quality: how consumer perceive durability, easy care, construction of garments • Fashionability; fashionable, classic, modern, stylish and elegant.	A variety of pairwise assortment scenarios were given to respondents to evaluate and choose a variety of product assortments. A multiple choice question was used to measure if the country of origin will influence respondent's preference for a product assortment. A multiple choice question was used to measure if the fashion ability would influence respondents' preference for a product assortment.
Objective 3: To determine the priority ranking of specific identified diagnostic cues used by female consumers in an emerging market to evaluate the work wear product assortment in department stores.	To explore the diagnostic value of extrinsic cues as well as intrinsic cues used by the emerging market female consumer group in their evaluation of apparel product assortments within department stores in South Africa	To rank the extrinsic and intrinsic cues in terms of relative importance.	Style Colour Size Brand Price Functional and perceived quality Store Image Country of Origin Fashionability	• Style: Classic, trendy, tailored, variety and casual. • Colour: Neutral, bright, muted, seasonal, earth • Size: (standard and petite) (standard and plus) (standard) and (standard, plus and petite) • Brand: (In store and designer brands), (designer brands), and (In store brands). • Price: (Low to moderate), (moderate to expensive) and (expensive to very expensive). • Store Image: Discount, convenience, exclusive, quality, value orientation and fashionability. • Functional and perceived quality: durability, easy care, well made • Country of Origin: Made in China, Made in Europe or Proudly South African. • Fashionability; fashionable, classic, modern, stylish and elegant.	Through the use of conjoint analysis and statistical analysis the researcher will be able to determine which of these intrinsic and extrinsic cues are ranked highest on a scale of 1-9 preference.

4.7   RELIABILITY AND VALIDITY

Reliability is defined as a procedure to assess the stability and consistency of the measurement being used (Delport & Roestenburg, 2011:172). This indicates that should the current research with regard to the EFC be researched again, the outcome of the measurements would be nearly identical. Reliability will be enforced by using the below reliability measures (Delport & Roestenburg, 2011:177).

- Clear and instantly recognizable terms were used in the questionnaire. To make sure that all respondents understood the terms a definition list was added to the questionnaire.
- Multiple indicator questions were used to measure each objective stated in the research proposal. Each question in the questionnaire can be related back to the objectives set out in the research proposal, therefore each question is quantifiable and measureable.
- The questionnaire was pre-tested before it was distributed. This was done to ensure that the questionnaire was user friendly and to give the researcher time to make any changes should there be any negative feedback.

Validity can be two-fold and defined as a tool that measures the research in question and that the research is measured accurately (Delport & Roestenburg, 2011:172-176) or alternatively it can be described as the degree to which a measure accurately represents what has been measured (Hair *et al.*, 2006:447).   Conjoint analysis results can be validated from either internal or external perspectives.   Internal validation involves confirmation that the composition rule used, namely additive vs interactive, was appropriate (Hair *et al.*, 2006:447). In turn, external validity involves the ability of the conjoint analysis to predict the actual choices and preferences a consumer would make with regard to product assortment in department stores.

For internet-based conjoint analysis the below precautions had to be taken to ensure the reliability and validity of the study:

- Use a large criteria to test the reliability and validity for the analysis
- Use incentives through the use of a lucky draw where the winner could win R500 to motivate respondents to give reliable answers

- Encourage respondents to give feedback to gain as much information with regard to the study
- Analysis at individual level should lead aggregate analysis to identify any 'bad data'

4.8   ETHICAL CONSIDERATIONS

The concepts of ethics, values, morality community standards, laws and professionalism differ from one another without necessarily being mutually exclusive. Ethics is a set of moral principles which suggests the most correct conduct towards respondents in a research study (Strydom, 2011:114). All respondents were given an option on the electronic questionnaire prior to participating to give their consent. Respondents were not required to disclose any personal or potentially private information. All respondents remained anonymous and a consent letter was handed out before each survey was conducted. The information gathered was only used for research purposes and was not disclosed to any individuals besides the relevant parties involved in the research procedure. Respondents were requested to give informed written consent. They were briefed about participating in the research and about the evaluation process of apparel product assortment. It was explained that the type of questions asked would be used to determine the evaluation and preferences of the emerging market female consumer. Certain demographic information regarding urban areas, education and monthly income were requested to determine the type of emerging market female consumer group they were categorized in. Each participant was informed of their right to refuse to participate in the study without any negative implications. All information gathered was treated as strictly confidential and it was made clear that it would not be released to anyone besides the researchers.

The researcher used various sources of data and made use of references in the study to support the work of other individuals to guard against plagiarism. Prior to data collection the study and questionnaire were approved by the Research Ethics Committee (ResEthics) of the University of Pretoria. The role of ethics is to ensure that research utilizing human subjects and/or informants is bound by specific ethical principles. This ensures that a researcher applies the necessary rationale to preserve

and respect the rights, freedom and well-being of all individuals. The approval from the ethics committee contributed to the greater ethical considerations of this study.

4.9   CONCLUSION

This chapter has described the research methodology that was used to address the research objectives of this study. Firstly, the research design which for the purposes of this study was based on a quantitative, cross-sectional survey approach was explained. An online, self-administered questionnaire was designed that included a conjoint analysis method to collect data from an appropriate sample of 121 female emerging market respondents. The questionnaire consisted of demographic questions as well as pair wise comparison profiles. The sample included females from an emerging consumer market (n=121) residing in the greater Gauteng area. E-mail as well as social media networks such as Facebook and LinkedIn was used to approach respondents to complete the questionnaire. Anonymity as well as confidentiality was ensured during the administration as well as the analysis of the questionnaires. The respondents confirmed that they completed the questionnaire of their own free will and were not forced to answer any questions. Thus, this chapter has described the research methodology used, including the population, sample and sample size, data instruments and data collection procedures, as well as the strategies for ensuring ethical standards and the reliability and validity of the study. The next chapter (Chapter 5) will present the results according to the objectives formulated for this study.

CHAPTER 5: DATA ANALYSIS: RESULTS

5.1   INTRODUCTION

In this chapter the results are analysed, explained and summarised. They are organised and presented according to the constructs of the objectives set out in this study. Data was collected through an online self-administered questionnaire and processed to gain a better understanding of which cues the emerging market female consumer (EFC) use to evaluate work wear in a product assortment of South African department stores. In this Chapter there will be a brief overview of the demographical profile of the sample where the researcher will discuss the sample and its key characteristics. This will be followed by the descriptive statistics of this research paper. The researcher will touch on: 1) Selection of the preferred profiles, 2) Priority ranking of the identified diagnostic cues and 3) conjoint attribute importance of the levels. Conjoint analysis can be interpreted on an aggregate level or an individual level. For the purposes of this study, conjoint analysis will be interpreted on an aggregate level.

5.2   DEMOGRAPHICAL PROFILE OF THE SAMPLE

The unit of analysis for this study was based on female respondents. Female consumers are considered to be the main shoppers when it comes to spending money on apparel. One hundred and twenty one (n=121) usable questionnaires were completed by female respondents living in the greater Gauteng region of South Africa. They were aged between 20 and 62 (See Table 5.1). The respondents who took part in completing this questionnaire were mainly black (46.2%) followed by white (36.2%) and from other races (17.3%). Respondents (33.06%) indicated that they had a household income of more than R25000 per month while 11% earned less than R5000 a month. Respondents (47.11%) indicated that they had a tertiary degree, while the remainder indicated that they had a qualification or training. The

overall demographic profile of the respondents can be summarised as educated females in their working field, living and working in the Gauteng area of South Africa between the ages 20 and 62.

TABLE 5.1: SAMPLE CHARACTERISTICS

Sample variables	Frequency	Percentage (%)
Age (n=121)		
20-30	60	49.58%
31-40	40	33.05%
41-50	14	11.57%
51-60	6	4.95%
61>	1	0.82%
Income (n=121)		
< R5000	17	14.05%
R5001-R7000	6	4.96%
R7001-R10000	13	10.74%
R10001-R15000	19	15.70%
R15001-R20000	12	9.92%
R20001-R25000	14	11.57%
>R25000	40	33.06%
Ethnicity (n=121)		
Black	56	46.28%
White/Caucasian	44	36.36%
Others (Mixed race, Coloured, Asian)	21	17.36%
Level of education (n=121)		
Not matriculated (Grade 8 & 11)	2	1.66%
Grade 12 (Matric)	20	16.53%
Certificate	1	0.83%
Diploma	20	16.53%
Tertiary degree	57	47.11%
Honours degree	1	0.83%
Masters	12	9.92%
Other	4	3.32%

Respondents were asked to indicate their age, income, ethnicity and level of education in the questionnaire. The following pie and bar charts show how these aspects of the sample were distributed and analysed.

Figure 5.1 shows the age distribution of the sample
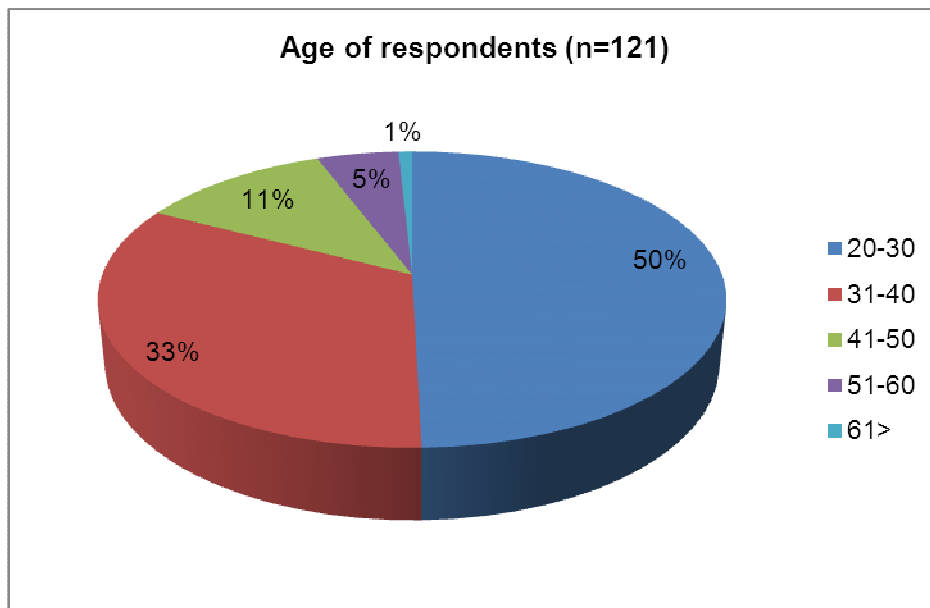
FIGURE 5.1:   DISTRIBUTION OF SAMPLE BY AGE

As depicted in Figure 5.1, the majority of respondents were between the ages of 20 - 30 (50%) with the second biggest age group between the ages of 31 and 40 years (33%) followed by the group between the ages of 41-50 years (11%) and 5% who were between the ages of 51 and 60 years. Only 1% of respondents were over the age of 61. The above table will now be depicted and summarised through the use of pie charts.

Figure 5.2 shows the income distribution of the sample

	< R5000	R5001-R7000	R7001-R10000	R10001-R15000	R15001-R20000	R20001-R25000	>R25000
Series1	14.05%	4.96%	10.74%	15.70%	9.92%	11.57%	33.06%
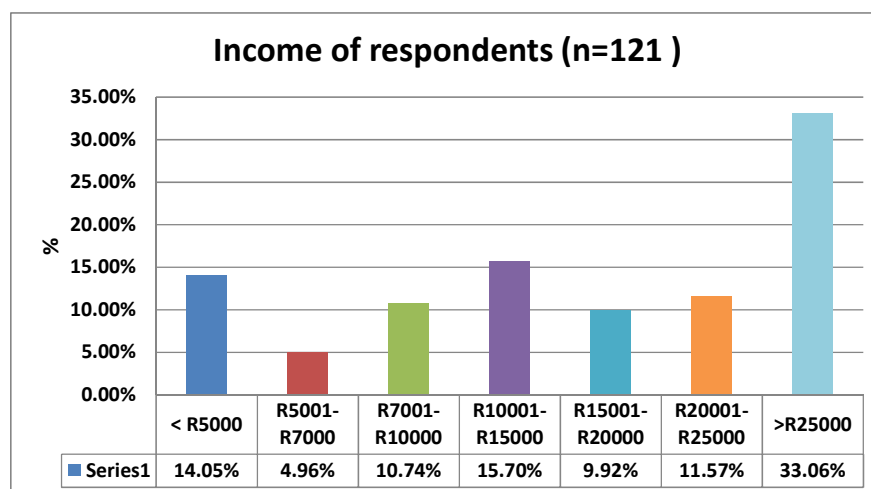
FIGURE 5.2:   INCOME DISTRIBUTION OF SAMPLE

The above figure (Figure 5.2) shows in which income bracket respondents were grouped. A third (33.06%) of the respondents earned a household income of R25000 and more. The second highest income category (15.7%) showed respondents earning a household income of between R10001 – R15000 while 14% of respondents earned less than R5000 a calendar month. From the above chart it seems as if income is evenly distributed among emerging market female market consumers but there is a big income gap between respondents earning more than R25000 a month and respondents earning less than R5000 a month. This is due to the fact that 50% of the respondents used in this sample were aged between 20 and 30, indicating that they would have just finished their tertiary training and were currently in their first jobs or were still students.

Figure 5.3 shows the cultural group/ethnic distribution of the sample. The number of respondents from the mixed race coloured and Asian groupings were clustered together. The combined group was labelled 'Other' (21 respondents).
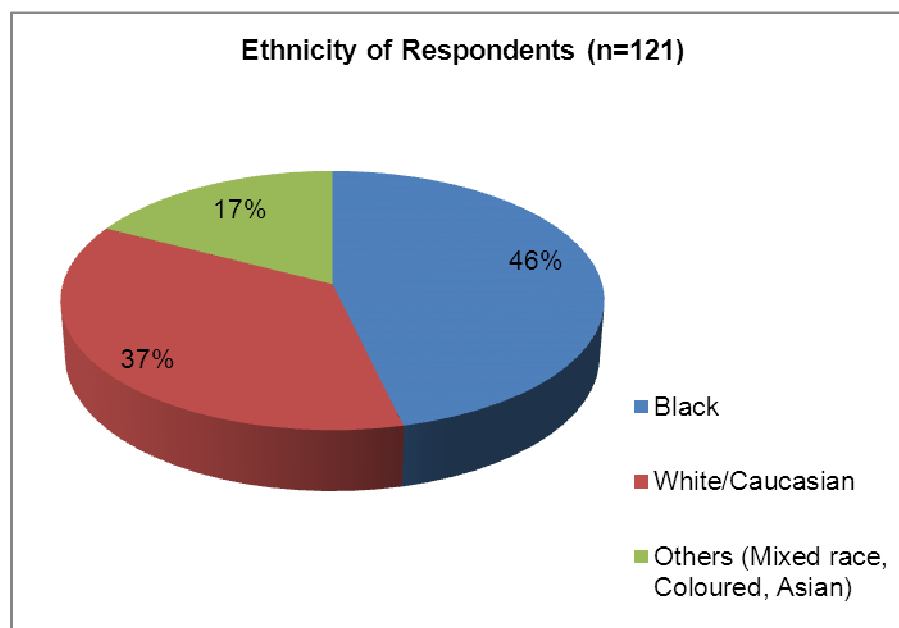
FIGURE 5.3:   DISTRIBUTION OF SAMPLE BY ETHNICITY

Figure 5.3 is a summary of the ethnicity of the respondents used in this sample. From the above figure it is evident that 46% of respondents were black, 37% of respondents were white/Caucasian and 37% were Other (Mixed race/coloured or

Asian). This group was deemed appropriate for this study as the majority of people living in South Africa are black.
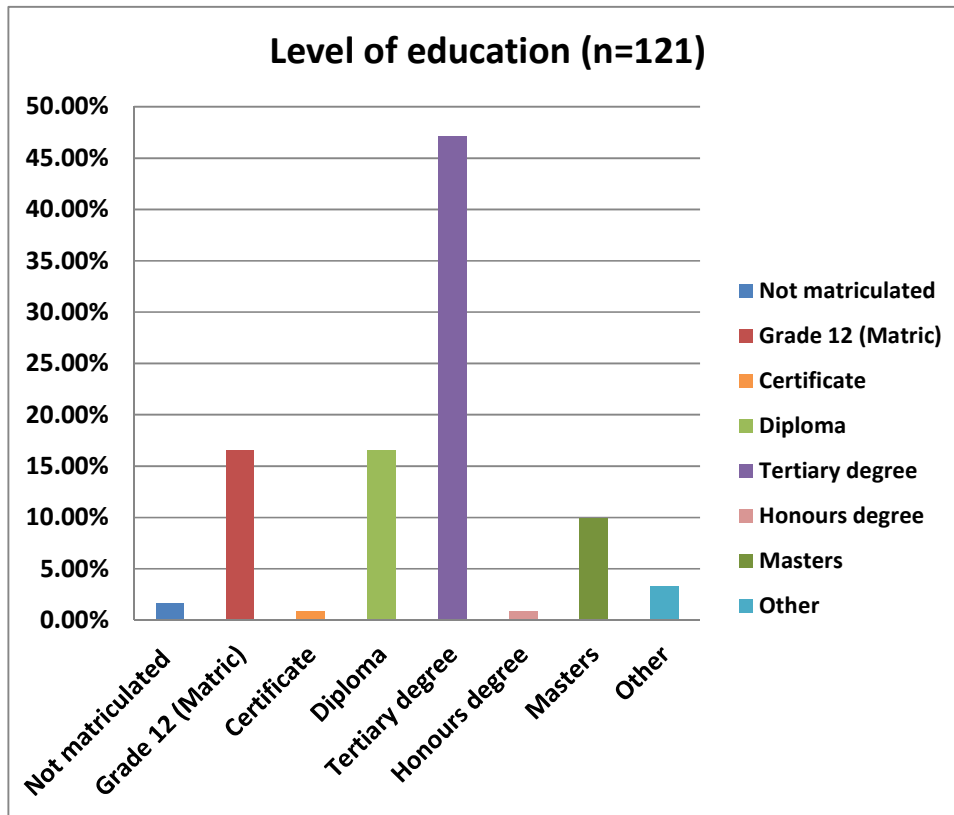
FIGURE 5.4:   DISTRIBUTION OF SAMPLE BY LEVEL OF EDUCATION

Almost half (49%) of the respondents said that they had obtained a tertiary degree and 17% said that they had either a Diploma or had matriculated (Grade 12). The rest of the respondents indicated that they either had an Honours degree (1%), a Master's degree (10%) or some other (3%) qualification. Only 2% or respondents indicated that they had not matriculated from high school. The sample chosen for this study is a good description and summary of the current female emerging market consumer in South Africa. Respondents were aged between the age of 20 and 60 which falls within the emerging market professionals as indicated by Mictert. Most respondents had some form of qualification which was also a criteria set by Mictert when identifying the emerging market in South Africa. (Mictert, 2005). This sample was seen as appropriate for this study in that female consumers are the decision makers within the South African retail sector, as mentioned in Chapter 1.

5.3 DESCRIPTIVE STATISTICS

A tabular summary is given to indicate the frequency distribution (number of responses) for each item or relating to a specific construct. In the following tables the reporting of the results are indicated in order of descending percentages and presented as such.

5.3.1 Stores patronised for work-wear

Table 5.2 summarises the results for the stores that are mostly patronised by the respondents. The respondents had to indicate where they mostly purchase work-wear.

TABLE 5.2: STORES MOSTLY PATRONIZED FOR WORK WEAR

Store name	Frequency	Percentage (%)
Woolworths	42	34.71%
Edgars	28	23.14%
Truworths	21	17.36%
Stuttafords	10	8.26%
Ackermans	4	3.31%
MR Price	4	3.31%
PEP	3	2.48%
Donna Claire	2	1.65%
Foschini	2	1.65%
Jet stores	1	0.83%
Queenspark	1	0.83%
Other	2	1.65%

Table 5.2 summarises which stores the female emerging market consumer prefer to purchase work wear from. This could indicate that the female emerging market also prefers the top three stores' (75.21%) product assortment to the other stores. From the above it is clear that that there are three main contenders when it comes to store patronage for work wear. These are firstly Woolworths, which was preferred by most of the respondents (34.71%), followed by Edgars (23.14%) and Truworths (17.36). The remaining 29 respondents preferred other stores as tabulated in Table 5.2. In other words, three retailers (Woolworths, Edgars and Truworths) dominate female emerging consumers' work wear purchases. The above three department stores are coincidentally also the top three stores that have in-store brands as well as designer

brands available in their stores. These top three preferred stores also provide credit to customers, making the option to purchase from these stores even more appealing than the other stores used in this study.

5.3.2 Preferred fashionability of work-wear

Table 5.3 summarises the results for the respondents' preferred fashionability in terms of their work-wear by presenting the frequencies and percentages of each item used to measure this construct.

TABLE 5.3: MEASUREMENT FOR FASHIONABILITY

Fashionability	Frequency	Percentage (%)
Classic	31	25.62%
Stylish	30	24.79%
Elegant	24	19.83%
Fashion	23	19.01%
Modern	11	9.09%
Other	2	1.65%

Table 5.3 shows that the female emerging market consumer identifies certain factors as being appealing within an apparel product assortment. When purchasing work wear the female emerging market mostly look for classic styles (25.62%) in a product assortment. This is closely followed by stylish products (24.79%), elegant (19.83%), fashionable styles (19.01%) and modern (9%). Few respondents thought that modern styles (9%) were important when evaluating work wear in a product assortment. Overall, responses to the preferred fashionability of work-wear were not related to fashion per se but to classic and stylish attributes. This might be an indication for retailers that the emerging market consumer is not yet as evolved and fashion-forward as Western countries like London and France but prefers a more toned down timeless look when purchasing work-wear. This can also be linked to economic reasons or values which indicate that the EFC prefer styles that are more conservative and classic rather than fashionable or modern work wear. Conservative and classic styles can be teamed with fashionable statement pieces. Classic styles are also 'timeless', which means they are fashionable for longer and the consumer can get more wear out of the item without the clothing appearing to be dated.

5.3.3 Preferred country of origin

Table 5.4 summarises the results for country of origin by presenting the frequencies and percentages of participants responses for each item used to measure this construct.

TABLE 5.4: MEASUREMENT FOR COUNTRY OF ORIGIN

Country of origin	Frequency	Percentage (%)
South Africa	58	47.93%
Europe	37	30.58%
China/India	25	20.66%
Other	1	0.83%

From the above table, it is evident that 47.93% of the respondents preferred to purchase clothing products that had been produced in South Africa. Ranked in second place was clothing made in Europe (30.58%) and lastly clothing made in China (20.66%). The above mentioned percentages could be an indication and reflection of EFCs sense of patriotism towards South Africa. There could be a perception amongst the female emerging market consumer that clothing produced in China would have less sustainability and would be of lower quality compared to locally produced clothing. Another possibility could be that consumers were aware of the low employment levels in South Africa and would rather support local manufacturers to enable work creation and boost the economy.

5.4 CONJOINT ANALYSIS

5.4.1 Selection of preferred profiles

In the following tables, the descriptive results are presented for the pair-wise profiles of assortment offerings, as prearranged in the questionnaire. Included in the profiles are the cues or product assortment attributes such as style, colour, size, price, brand, product care (quality), department store names and retail image. In each of the profiles there are also a group of levels to further analyse each attribute and break it down into different categories. The reporting of the results is based on the degree to

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which the respondents most preferred a profile. A one (1) would indicate a strong preference for the left profile and a nine (9) would indicate a strong preference for the right profile. The results for the 1-9 scale were given in the same order as selected by respondents.

Tables 5.5-5.7 summarises only the results for the most preferred profiles by respondents in terms of cues/attributes related to work-wear. The frequencies and percentages are presented below the pair-wise profiles to indicate the choice most preferred by the participants. In the tables the reporting is only on the responses for 1 and 2 (preference for left profile) and 8 and 9 (preference for right profile). The results of all the pair wise profiles are included in Addendum B.

The profiles below are the top three highest ranking profiles in the study.
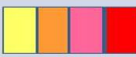
TABLE 5.5: PAIR-WISE PROFILES AND FREQUENCY FOR QUESTION 20

Q/Profile 20	1	2	3	4	5	6	7	8	9
Freq	5	2	6	6	7	11	24	22	37
%	4.1	1.6	4.9	4.9	5.7	9.0	19.8	18.1	30.5

For question 20, 48.6% of respondents preferred the profile on the right, compared to 5.7% of respondents who preferred the profile on the left.

TABLE 5.6: PAIR-WISE PROFILES AND FREQUENCY FOR QUESTION 24

	Classic Styles	VS		Trendy Styles
	Earth Tones			Seasonal Colours
	Standard and plus sizes			Standard, Plus and petite sizes
	Expensive to very expensive prices			Moderate to expensive prices
	In store brands			In store and designer Brands
	Well made			Easy Care
	Quality			Fashionable
	Pep			Woolworths

Q/Profile 24	1	2	3	4	5	6	7	8	9
Freq	8	2	10	7	6	12	21	22	33
%	6.6	1.6	8.2	5.7	4.9	9.9	17.3	18.1	27.2

For question 24, 45.3% of respondents preferred the profile on the right, compared to 8.2% of respondents who preferred the profile on the left.

TABLE 5.7: PAIR-WISE PROFILES AND FREQUENCY TABLE FOR QUESTION 19

	Variety of Styles	VS		Trendy Styles
	Earth Tones			Seasonal Colours
	Standard sizes			Standard and petite sizes
	Low to Moderate prices			Expensive to very expensive prices
	Designer Brands			In store brands
	Durable			Easy Care
	Fashionable			Discount
	Woolworths			Stuttafords

Q/Profile 19	1	2	3	4	5	6	7	8	9
Freq	31	19	22	18	5	5	6	6	9
%	25.6	15.7	18.1	14.8	4.1	4.1	4.9	4.9	7.4

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For question/pairwise profiles 19, <u>41.3%</u> of respondents preferred the profile on the left, as opposed to 12.3% of respondents who preferred the profile on the right.

From the above three profiles the preference structure used by the respondents in the conjoint analysis is evident. The three highest ranking profiles above have certain similarities. In all three of these profiles the store name with the highest preference structure was Woolworths, which indicates that this store is probably the one of the most highly patronized stores among the female emerging market consumer in South Africa. Secondly, variety of style, fashionability, durability and moderate to expensive pricing are present in two out of three of the highest ranking profiles. In the attribute category of brands, different brand attributes are present within each profile. This could be an indication that a brand is not deemed as being important for the female emerging market consumer when purchasing work wear.

5.4.2 Priority ranking of specific identified diagnostic cues in profiles

Questions 2-11, 15-25, 29-31, 33-34, 36-42 were choice sets presented to the participants in profiles containing assortment cues. Using these assortment profiles in pair wise combinations, researchers were able to statistically deduce which product attributes were the most preferred by respondents and which attributes had the most impact on the choices of the female emerging consumer market when evaluating work wear product assortments. The technique used for analysing the data is called the CVA (Conjoint value analysis) approach and the OLS (Ordinary Least Squared) method was used to calculate the utility levels of the attributes). All data were then exported into a SPSS.SAV file to be analysed.

According to the selected attributes included in the profiles the results show that the attribute rated to have the most relative importance was the Store. Table 5.8 depicts the relative importance of each attribute in descending order from most to least important

TABLE 5.8: ASSORTMENT CUE LEVELS AND ATTRIBUTES: RELATIVE IMPORTANCE OF ASSORTMENT ATTRIBUTES IN RANKED ORDER

Ranked order	Assortment cue (attribute)	Relative importance (%)	Average	Std dev	Number of levels
1	Store name	26.6%	26.6	11.9	6
2	Store Image	14.9%	14.9	4.4	6
3	Colours	14.9%	14.9	6.7	5
4	Style	12.2%	12.2	5.1	5
5	Size	10.1%	10.1	6.0	4
6	Price	9.7%	9.7	7.6	3
7	Quality	5.6%	5.6	3.3	3
8	Brand	5.6%	5.6	3.2	3

When conducting a conjoint analysis study, respondents indicated their preference for a group of hypothetical attribute alternatives. In this research study, respondents were given a hypothetical department store scenario with hypothetical attributes. The respondents had to indicate their preference for 8 attributes in a product assortment namely store name, store image, colours, style, size, price, care and brand. The aim of this research question was to determine which of these attributes respondents would rank highest on their preference level. In the above Table 5.8 and also in Figure 5.5 below, the importance of each attribute is shown in percentages and in ranking order.
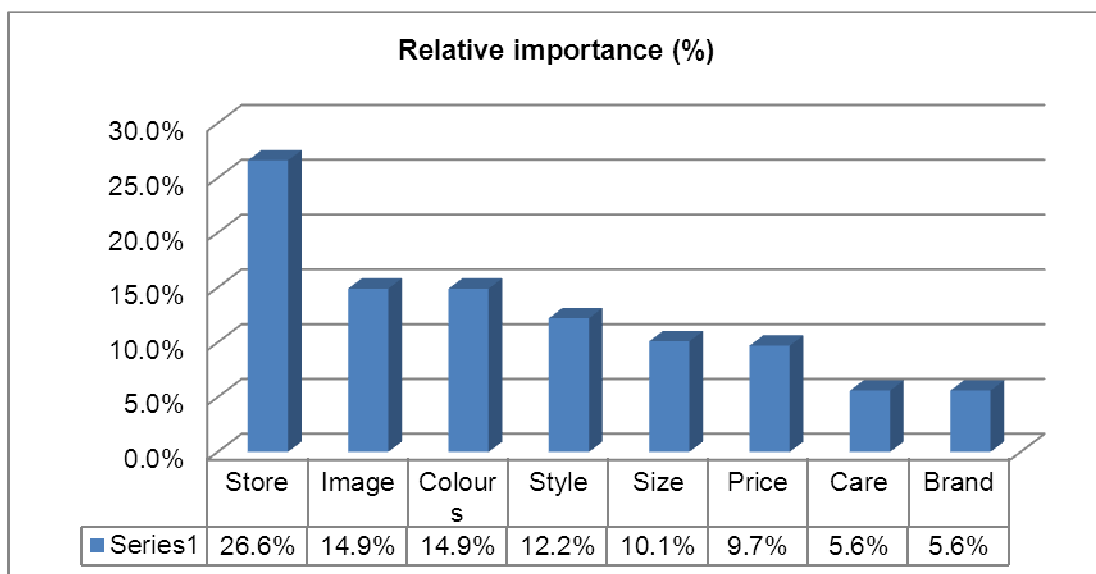
FIGURE 5.5:   RELATIVE IMPORTANCE OF ATTRIBUTES

Each attribute related to the product assortment imitated/replicated in the profiles will now be discussed individually.

Store: Store name was rated the most relative important attribute for the emerging market female market consumer. Store name was divided in levels representative of the department stores currently operating in South Africa, namely Woolworths, Edgars, Truworths, Stuttafords, Ackermans and PEP. From the results it is evident that store name showed up as one of the most important attributes for female shoppers. When the outcome of the data analysis was interpreted and discussed it was found that store was found to be the most important assortment cue (attribute) in consumer's evaluation of apparel assortments of department stores. The results showed that the relative importance of store name in the evaluation process of work wear product assortment was 26.6%. This could be because the department stores in South Africa are currently already targeting the female emerging consumer. The above findings could also possibly be based on the fact that the female emerging market consumer was already patronizing these stores and therefore an element of past experiences and pre-meditated store preference could be present in their decision making.

Store image: Store image is the second most important attribute after store name at 14.9%. Store image is defined by Chang and Lang (2010:513) as the consumer's perception of a store and the stores attributes. It is very important to EFCs, who are often influenced by their peers, family and friends when purchasing work wear. Store image was divided into 6 levels namely PEP, Ackermans, Truworths, Edgars, Woolworths and Stuttafords. The result of these levels will be discussed further in Chapter 6.

Colours: Joint second in the list of attributes influencing the evaluation process of work wear product assortments was colour. The relative importance of colour and its effect on the evaluation process was 14.9%. This is the first intrinsic attribute in the ranking; both store and image are extrinsic attributes. As previously mentioned in the research, colour is usually analysed as a multi-dimensional attribute along with other attributes like fashionability, style and store image (Crozier, 1999: 13). Colour is also one of the most significant attributes when it comes to influencing consumers on a visual level. It is the first thing consumers usually notice on a garment, therefore it is

not surprising that this attribute has ranked in the top three of most important attributes when evaluating work wear product assortments.

Style: Style influenced the consumer's evaluation process at 12.2%. In this research study, when we discuss style, we are referring to the structural design of a garment. Style is linked to fashionability or fashion style when used to refer to the custom of dressing that prevails among a group of people at a certain point in time (Perna, 1987:48), while the overall feel of a store's fashionability was analysed in terms of whether the store was seen as fashionable, classic, modern, stylish or elegant. The perception of a store's fashionability will have direct influence on how the store's clothing style is interpreted by the respondent.

Size: The size of garments within the work wear product assortment had a ranking of 5 out of 8 at 10.1%. Size relates to a target market's preferred fit of a garment, (Brown & Rice, 2014:199; 213). In the context of this research, size refers to the preferred fit of the female emerging market consumer in South Africa. Research conducted by De Klerk and Strydom (2006:87) suggests that a wide variety of measurement techniques are used across retailers in South Africa and that a standardized method for the sizing of clothes does not exist. The fact that size ranked at such a low rating of importance could indicate that the emerging market female consumers are satisfied with the variety of sizes available to them in the South African retail market, or it could indicate the opposite, which is that South African consumers are not educated enough in this area and that they do not know how an apparel product should fit. This topic will be discussed further in Chapter 6.

Price: Price was ranked the third lowest in this research study. Its relative importance was only ranked at 9.7 % by the female emerging market consumers. In previous research by Eckman *et al.* (1990:14) it was found that price and brand were the most researched and assessed attributes within the product attribute category. This could mean that the female emerging market consumer finds price less important than some of the intrinsic attributes researched in this study. This could be because they find it important to show a certain image of professionalism through their clothing and are therefore willing to spend more money on work wear than casual clothing.

Quality (perceived and functional): Care ranked second last and only had a 5.6% relative importance rating by the female emerging market consumer. The care of the garment is directly related to the quality of the physical product. Quality can be analysed as a two part category namely functional quality and perceived quality. When analysing the quality of product consumers will refer to intrinsic dimensions like construction, style and textiles, this is called functional quality. When functional quality is not visible or the consumer cannot base a decision solely on this attribute they will make use of other attributes such as store name, price, brand or country of origin. This is known as perceived quality. The possibility does exist that care was not seen as an important attribute because department stores like Woolworths often use quality as a marketing tool to create a store image. Therefore if the consumer preferred a store with an image of good quality they would expect to receive good quality and would not bother to look at the physical product because the store image of quality has such a strong presence.

Brand: The lowest ranked attribute was brand. Brand only had a 5.6% relative importance rating in the evaluation process of the work wear product assortment. Store brands have an advantage over manufacturer brands in the sense that they are multi-faceted (Ailawadi & Keller, 2004), and often rely on other attributes like store atmospherics, price, quality and product assortments to create a stronger brand image. This could be an indication that the female emerging market consumer relies on other product attributes to make a decision before relying on the brand. Very often consumers will use store and brand interchangeably when evaluating a product assortment. This usually occurs when stores have strong private labels or have in store brands like Truworths, Woolworths or Ackermans. It can be hard for the consumer to differentiate between evaluating the store image and the brand separately and the consumer may then quite often see these two attributes as being interchangeable.

5.4.3 Priority ranking of attribute levels in profiles

In Table 5.9 the attributes included in the product assortment profiles were divided according to the specified levels. For each attribute the highest ranking level is indicated in descending order. Attributes are ranked from most important to least important: Store, Store Image, Colour, Style, Size, Price, Care and Brand. Each

attribute was the broken down to the various levels and Table 5.10 depicts how each level was ranked within the attribute.

TABLE 5.9: HIGHEST RANKING LEVEL OF EACH ASSORTMENT ATTRIBUTE

Attribute	Attribute level	Attribute Relative importance (%)	Attribute level utility value	Std dev.
Store	Woolworths	26.6%	17.3	29.1
	Edgars		12.0	28.0
	Truworths		8.9	25.8
	Stuttafords		-2.5	31.7
	Ackermans		-8.8	26.9
	Pep		-26.9	32.5
Store Image	Quality	14.9%	3.6	14.2
	Exclusive		2.0	18.9
	Convenience		1.5	17.5
	Value		-1.3	16.0
	Fashion		-2.0	15.9
	Discount		-3.6	18.4
Colour	Neutral	14.9%	6.5	18.2
	Bright		2.2	18.3
	Earth		-1.0	19.6
	Season		-1.9	15.8
	Pastel		-5.7	18.0
Style	Varied	12.2%	2.5	14.9
	Classic		2.0	14.6
	Trendy		-0.8	14.4
	Casual		-1.1	16.9
	Tailor		-2.5	13.8
Size	SML	10.1%	3.5	15.8
	ML		2.6	15.0
	M		-2.3	14.4
	SM		-3.8	16.2
Price	Low to M	9.7%	6.1	15.9
	M to H		2.1	9.5
	H to VH		-8.2	15.5
Quality	Durable	5.6%	0.9	8.8
	Well Made		0.5	7.7
	Easy Care		-1.4	8.2
Brand	S and D	5.6%	1.9	8.0
	Designer		-0.8	9.3
	Store		-1.1	10.2

When consumers evaluate product attributes, they are likely to make trade-offs. These can be explained as follows: when a consumer likes the style of a product but cannot afford the price he/she will then base the decision on whether the quality of the garment is worth the price. When this happens, attributes are measured in utility values. Utility can be defined as a numerical number that represents the value

consumers invest on particular attributes or alternatively the relative 'worth' of an attribute (Hair *et al.*, 2006: 464). A low utility value indicates a lower value whereas a high utility value indicates a higher value. Attributes with the highest value can be seen as the consumers preferred product attribute. The above table 5.9 shows the highest ranking value of each attribute with the highest attribute level of each attribute. When a conjoint analysis research is conducted the attributes are analysed and every level of each attribute are looked at to determine the impact of each attribute on consumer preferences. In this research, each attribute level was determined by using an arbitrary additive constant, which means that the utility level for one attribute cannot be measured against the utility level for another (Orme, 2010:78). Therefore the negative utility levels in the above table cannot be compared with the utility levels of an attribute with positive levels. Every utility level must be compared with its own attribute.

Figure 5.6 shows how the respondents ranked the levels within the attribute store name.

	Woolworths	Edgars	Truworths	Stuttafords	Ackermans	Pep
■ Utility Value	17.3	12	8.9	-2.5	-8.8	-26.9
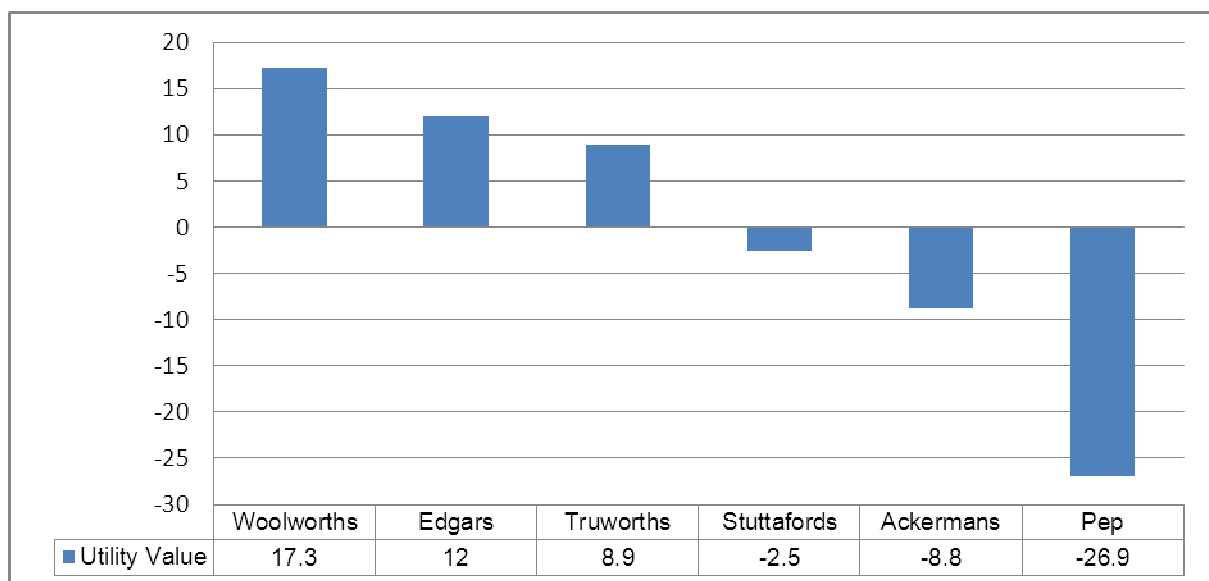
FIGURE 5.6:   ATTRIBUTE UTILITY LEVELS OF STORE NAME

The utility values of each level in store name (attributes) postulates which stores EFCs prefer to purchase their work wear from, as well as the stores which are not preferred by the EFC. Woolworths had the highest utility value of 17.3, followed by Edgars (12.0) and then Truworths (8.9). The negative utility values indicate disfavour

towards stores like Stuttafords (-2.5), Ackermans (-8.8) and PEP (-26.9). Woolworths was ranked the highest in the category of the store names, which could be because Woolworths offer many other services to their consumers including a food brand. Due to the food brand aspect, Woolworths has become a household name among South Africans and has a very strong brand name presence in the media. The top three ranking stores Woolworths, Truworths and Edgars are all store names associated with quality and medium to high pricing structures, whereas the lowest ranking stores like Ackermans and PEP are associated with discount pricing structures and lower quality clothing with lower prices.

Figure 5.7 shows how the respondents ranked the levels in terms of the attributes of store image

	Quality	Exclusive	Convenience	Value	Fashion	Discount
■ Utility Value	3.6	2	1.5	-1.3	-2	-3.6
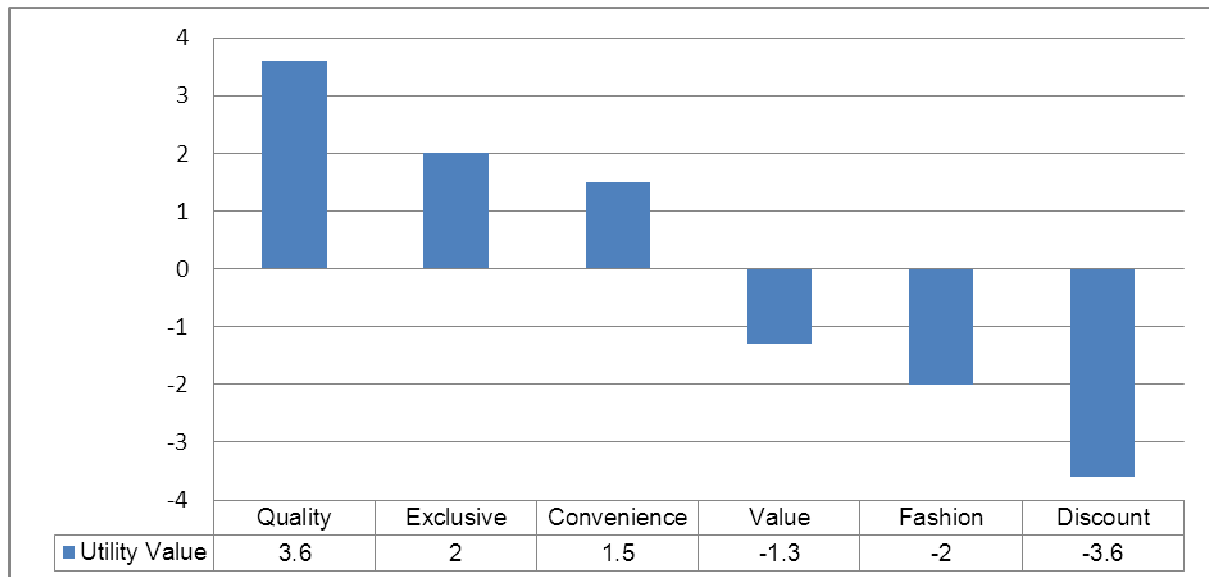
FIGURE 5.7:   ATTRIBUTE UTILITY LEVEL OF STORE IMAGE

Figure 5.7 shows the attribute utility level of store images and which store image is preferred by the EFC. The attributes levels ranked by the EFC were quality, exclusivity, convenience, value, fashion and discount. Quality had the highest EFC value of (3.6), followed by exclusivity (2) and convenience (1.5). The negative utility values included value (-1.3), fashion at (-2) and discount (-3.6). Quality as a store image was ranked in terms of the most preferred image of stores among the EFC, which can be linked to the store name category where Woolworths was ranked as

the most preferred store name. Woolworths is known for displaying a brand image of offering quality products at affordable prices to consumers.

Figure 5.8 shows how the respondents ranked the levels for the attributes of colour.

	Neutral	Bright	Earth	Season	Pastel
■ Utility Value	6.5	2.2	-1	-1.9	-5.7
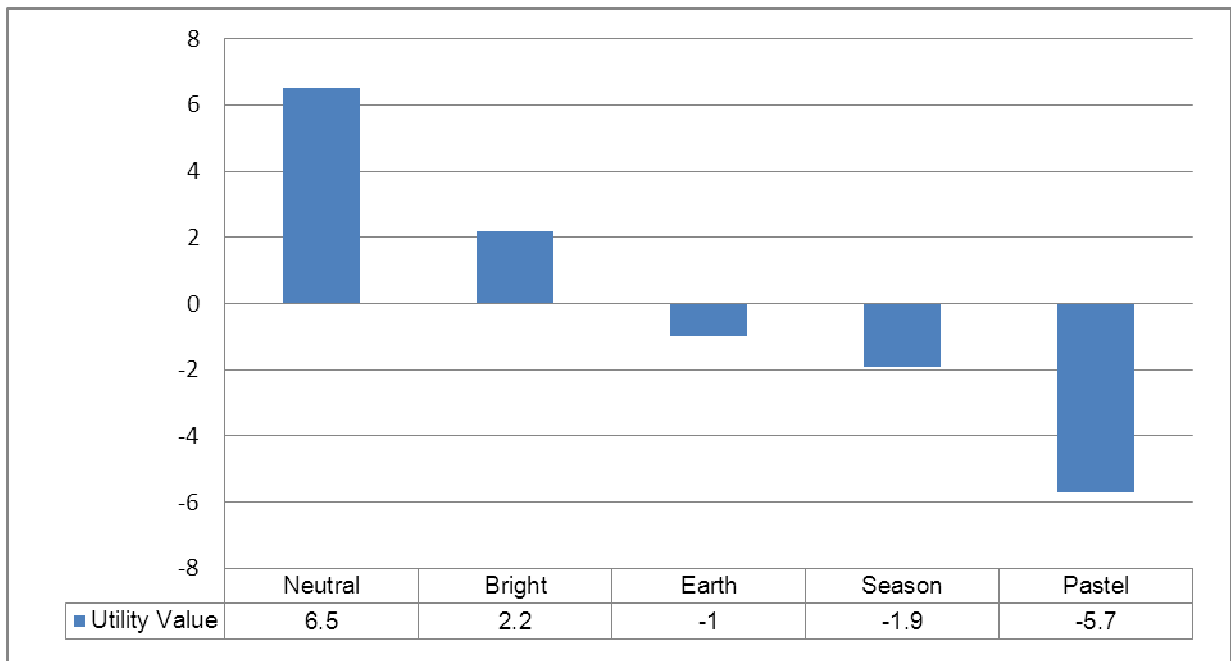
FIGURE. 5.8:   ATTRIBUTE UTILITY LEVEL OF COLOUR

Figure 5.8 shows the utility levels of colours and which colours the EFC found to be most important in their evaluation of the product assortments of department stores. Colours were split into neutral colours, bright colours, earth colours, seasonal colours and pastel colours. Neutral colours were ranked/rated as the most preferred by the EFC (6.5), followed by bright colours (2.2). Earth (-1), while seasonal (-1.9) and pastel (-5.7) were ranked negatively by the EFC consumers. Neutral colours were the attribute most preferred by the EFC, which can be linked to the category of apparel (work wear) which is mainly available in neutral or basic colours such as white, black, grey and navy to increase the possibility of combining neutral colours with one another to portray a more professional image.

Figure 5.9 shows the utility values of the attribute style

	Varied	Classic	Trendy	Casual	Tailor
■ Utility Value	2.5	2	-0.8	-1.1	-2.5
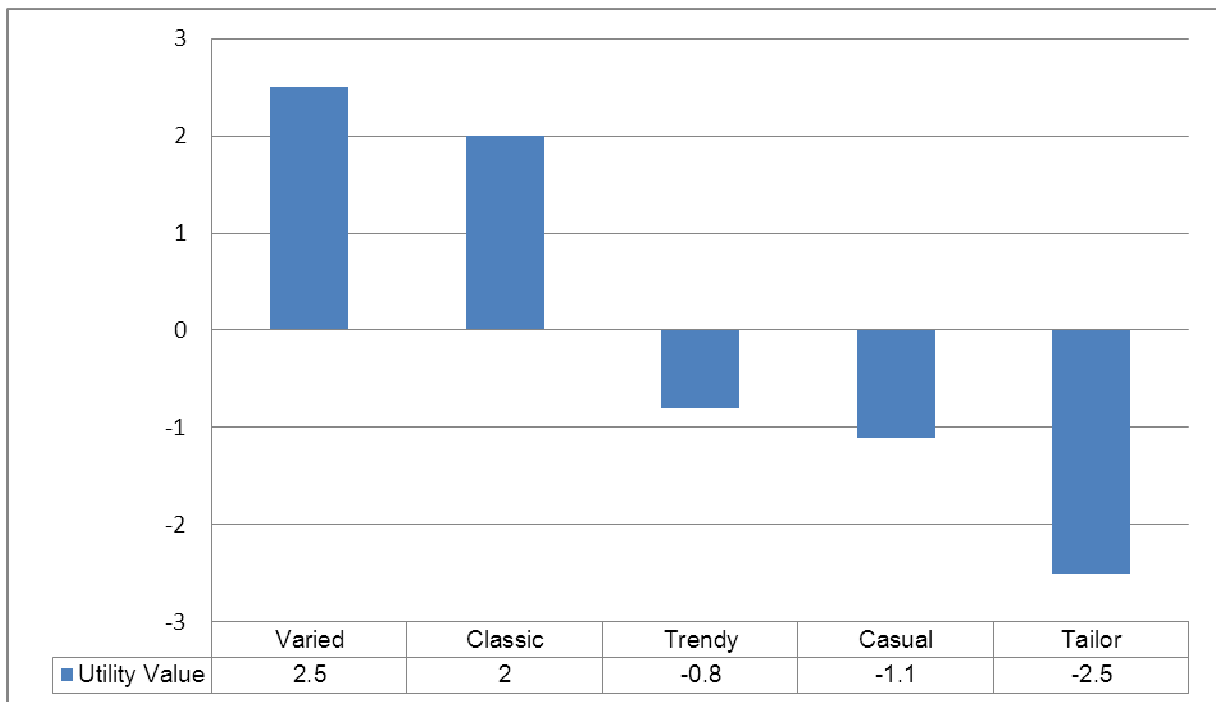
FIGURE 5.9:   ATTRIBUTE UTILITY LEVEL OF STYLE

Figure 5.9 shows the utility levels of style most preferred by the EFCs. For the style attribute the category was split into varied, classic, trendy, casual and tailored work wear styling. The varied category was the highest (2.5) followed by classic (2). From there on, trendy (-0.8), casual (-1.1) and tailored (-2.5) were ranked as the lowest. Varied styles were most preferred by the EFCs, showing that they would still like to have the option of using their own creativity in mixing different style types to create an individual clothing image in their work environments. This may also be a cost saving method where work clothes can be combined with casual clothing to reduce the number of clothing options respondents have for purchasing their working wardrobe.

Figure 5.10 shows the utility values of the attribute size

	SML	ML	M	SM
■ Utility Value	3.5	2.6	-2.3	-3.8

FIGURE 5.10: ATTRIBUTE UTILITY LEVEL OF SIZE

Figure 5.10 is a representation of the highest and lowest ranked size ratios preferred by the EFCs for work wear. The highest ranking ratio was S/M/L (3.5), while M/L (2.6) was second. The size ratios that showed negatively were M (-2.3) and S/M (-3.8). The above results show that the sizing of South African retailers might not be standardized across one universal scale. Consumers preferred to have the option of multiple sizes to see which size fits them better across all the retailers. Another indication of the preference for multiple sizing could be that the EFC cannot be narrowed down to specific body types, the above results could be an indication that because of the diverse ethnicities in South Africa a need exists for retailers to cater for different body sizes to ensure a good size fit of all clothing.

Figure 5.11 shows the utility level of price
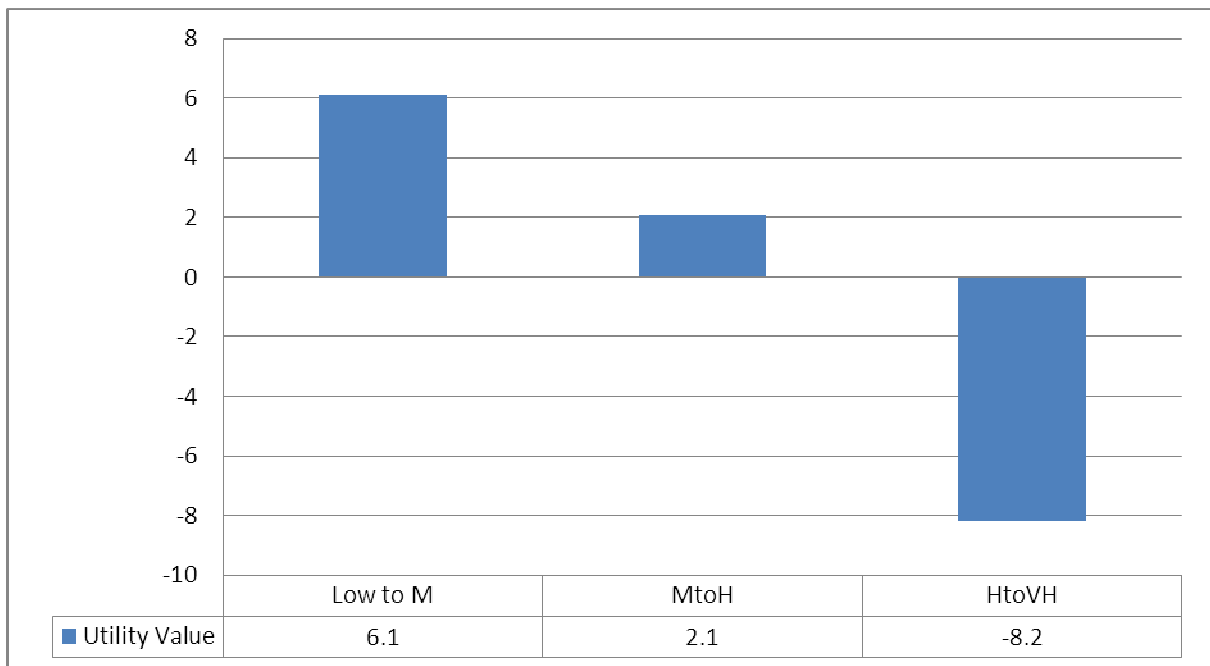
FIGURE 5.11: ATTRIBUTE UTILITY LEVEL OF PRICE

Figure 5.11 shows the most favourable and the least favourable price ratios preferred by the EFCs. The highest ranked utility value was the price range Low to Medium (6.1), the second highest utility value was Medium to High (2.1) and lastly the lowest ranked price utility value was High to Medium (-8.2). Most of the EFC's preferred a price range of low to medium cost in terms of what they were willing to spend on work wear. This is indicative of an emerging market consumer for whom a medium to very high ratio would be affordable. This indicates that the EFCs can only allocate a very small amount of their income to work wear clothing. If the EFC had the opportunity to purchase clothing on credit they would be able to purchase more expensive clothing by paying it off on a monthly basis.

Figure 5.12 shows the utility value of the attribute care.

	Durable	Well Made	Easy Care
■ Utility Value	0.9	0.5	-1.4
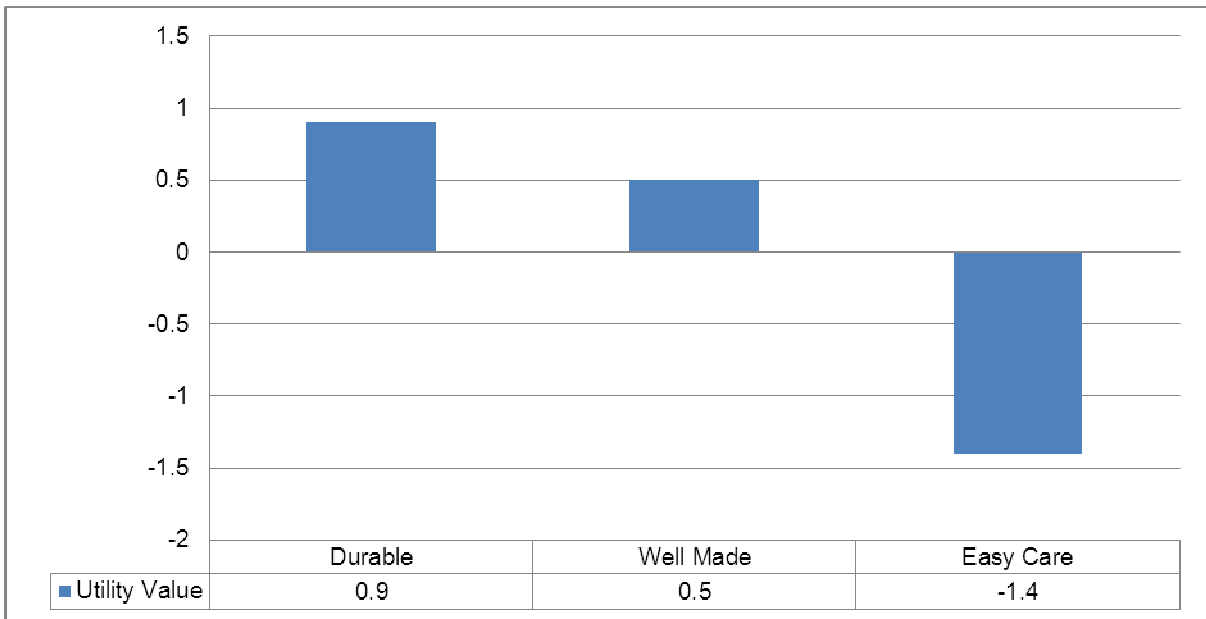
FIGURE 5.12: ATTRIBUTE UTILITY LEVEL OF QUALITY

Figure 5.12 shows which level of quality (functional and perceived) was most preferred by the EFC market. The highest ranked attribute level preferred by EFC was durable work wear (0.9), second was well-made work wear (0.5) and finally easy care 9-1.4). This indicates that the EFCs prefer durable clothing which will last them a long time, which can be linked back to the price of clothing where they preferred a price ratio of low to medium. This shows that the consumer does not have a lot of expendable cash flow to spend on work wear clothing and that they would prefer to buy clothing which is durable and will last them longer at a low to medium price.

Figure 5.13 shows the utility level of the attribute brand.

	SandD	Designer	Store
■ Utility Value	1.9	-0.8	-1.1
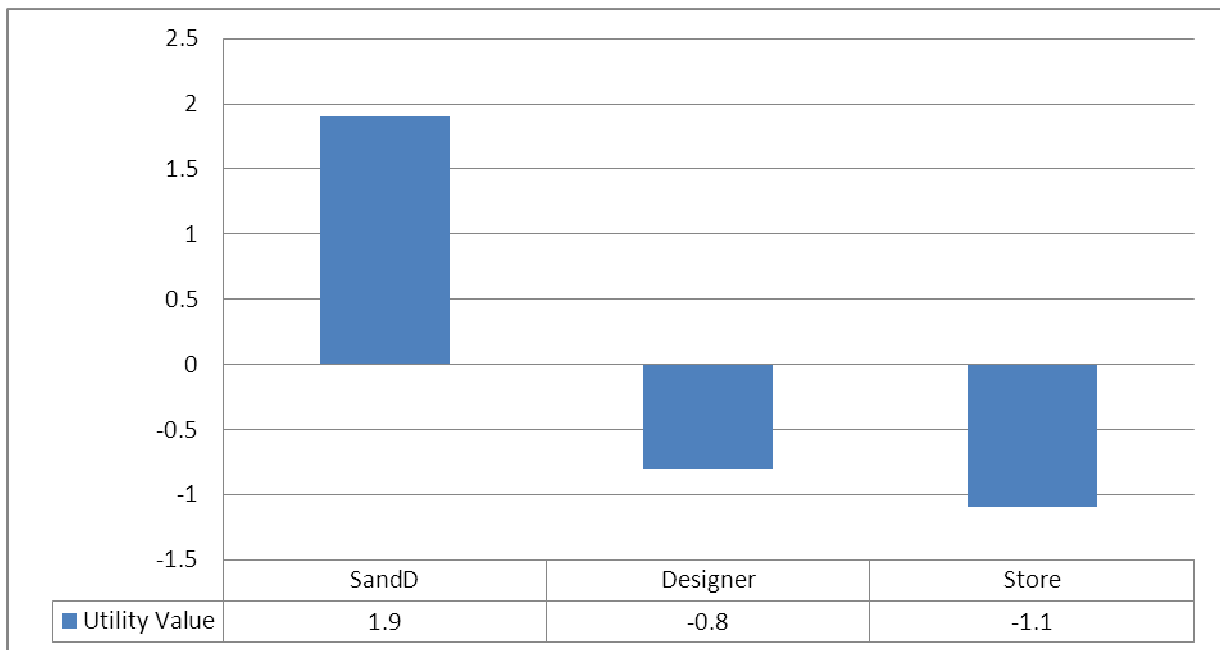
FIGURE 5.13: ATTRIBUTE UTILITY LEVEL OF BRAND

Figure 5.13 shows the utility levels of brands most preferred by the EFCs. The highest ranking value was store and designer brands (1.9), second was designer, showing negatively at-0.8 and store brands (-1.1). The EFCs mostly preferred store and designer brands. Once again this is an indication that the EFCs would like to have the option of purchasing one or the other. They may purchase a store brand combined with a designer brand and combine the two pieces of clothing.

5.4.4 Conjoint attribute importance correlated with levels

The reliability and quality of responses to the questionnaire is measured based on a criterion of estimating part-worth using OLS-regression along with an r-squared measure of consistency also known as the 'goodness of fit' measure. This is used to determine the reliability of a judgement. The R-squared is the most common goodness of fit measure within conjoint analysis models, while any measure above 0.8 could be described as a good fit (Hair, et al. 2006: 501).

Table 5.10 shows that the r-squared value for this study is 0.963, which means that the fit explains a 96.36% of the total variation in the data with regard to the average.

TABLE 5.10:ATTRIBUTE IMPORTANCE CORRELATED WITH LEVELS

2 Variables:		Levels Importance	
Spearman Correlation Coefficients, N = 8			
Prob> |r| under H0: Rho=0			
	Levels		**Importance**
Levels	1		**0.96362**
Levels			0.0001
Importance	**0.96362**		1
Importance	0.0001		

5.5 CONCLUSION

Conjoint analysis was seen as the most appropriate research model for this study. This enables the consumer to make choices between hypothetical product assortments in hypothetical department stores. The theory and methods of conjoint analysis involve complex decision making that involve aspects of assessment, comparison and product evaluation. In Chapter 6, the research findings are integrated in the conclusions drawn for the study. The chapter will conclude with final recommendations, limitations of the study and recommendations for future research.

CHAPTER 6: DISCUSSION AND CONCLUSION

6.1   INTRODUCTION

This research has explored how emerging market female consumers evaluate work wear product assortments in South African department stores. Conjoint analysis was applied to identify the trade-offs between different product attributes and utility levels within the work wear product assortment in these stores. A questionnaire was used to gather information from the EFC (emerging market female consumer) to find out how they evaluate the work wear product assortments in South African department stores. The consumer preferences revealed in the conjoint analysis based on the questionnaire are presented and discussed in Chapter 5. These discussions are used in this chapter to draw final conclusions and make recommendations about the findings. Chapter 6 contains in-depth discussions of each objective of the study and findings as well as the implications and recommendations for retailers and marketers. The chapter will conclude by discussing questions raised in the study, implications and any suggestions for future research.

The purpose of this study was to explore the diagnostic cues used by EFCs to evaluate work wear assortments in major South African department stores against the theoretical background of the cue diagnostic perspective. The discussion and interpretation of the objectives in this research are presented in a specific sequence. The first section, deals with how EFCs explore and describe the relative importance of intrinsic cues (such as colour, style or size) when evaluating work wear product assortment. The second part focuses on how EFCs explore and describe the relative importance of extrinsic cues (such as store name, store image, price, quality, brand and country of origin) when evaluating a product assortment. The third part deals with how EFCs determine the priority ranking of the specific identified diagnostic cues used by EFCs in their evaluation of department stores' work wear product assortments. The fourth part focuses on recommendations, limitations and the implications for future research and finally the last part deals with a summary and the final conclusion of the study.

6.2   CONCLUSION IN TERMS OF THE SAMPLE

EFC's were chosen to take part in the survey based on predefined set criteria for demographic elements. The sample consisted of 121 EFC's living in Gauteng, South Africa. The respondents' ages varied from 20 to 60 years and were mainly from black (46.2%) and white (36.3%) racial groups. The study was conducted across a multitude of cultures to ensure that accurate findings were reported. Most of the respondents were educated to some extent, while most were educated up to tertiary degree level (47.11%), and other respondents indicated that they had an alternative qualification in the form of a diploma (16.53%) or a matriculation certificate (16.53%). The fact that a majority of the sample had experienced further education indicates that they would be working or planning on moving into a working environment, making them ideal for a study based on the product assortment of work wear. A large portion (33.06%) of the respondents indicated that they had more than R25000 as a household income, making them an ideal group for the study as they would have enough disposable income to spend on work wear apparel.

The EFC's indicated that they preferred certain product attributes in a product assortment above others. The most favoured attribute was store name (26.6%). The store names used in this study were all national department stores which were already familiar to the EFC's. The fact that store name ranked as the most important attribute could indicate that EFC's prefer to shop at stores they are familiar with, have shopped at previously and whose brand image they are already aware of. Store image (14.9%) was ranked as second, indicating that the EFC consumer is very conscious of the type of stores they visit and what the brand represents in terms of work wear product assortments. Colour (14.9%) was ranked as third and the first intrinsic attribute in the EFC's preference framework. An emphasis on colour could be an indication of connotations about what each colour represents. Style (12.2%), size (10.1%), price (9.7%), quality (5.6%) and brand (5.6%) all ranked in the lower ends of the preference framework, showing that these attributes are not as important to the EFC's as the aforementioned attributes.

From the research conducted, it is evident that the EFC have a set preference towards certain attributes in the product assortment. Some of the attributes are used

in conjunction with one another and complement one another, as discussed in the results below. The preference rating of the EFC will specifically be of interest to retailers, as they can use this information in their range planning when developing product assortments for the season. Marketers can use this information when targeting consumer groups by means of advertising and visual merchandising.

6.3 CONCEPTUAL FRAMEWORK FOR STUDY

It is clear from the results that respondents preferred some cues over others. According to the cue diagnostic framework, most judgements and choices made by consumers are based on multiple attributes (Slovic & Lichtenstein, 1971), and the extent to which a cue for a product is evaluated will vary within its perceived diagnostic (Richardson et al., 1994). Consumers have a preference framework from which they will evaluate and make decisions regarding product assortment, while the cue diagnostic framework is used not only as a platform for researchers to evaluate the importance of each attribute but also to consider the level of importance each attribute has when placed in the preference framework (Jin et al., 2010:186). The central theme to note is that when consumers evaluate a product assortment, product cues can be ranked as equally significant, traded off against other cues or ranked from most important to least important, depending on the product cue being evaluated.

The revised conceptual framework (Figure 6.1) for the study is provided below to illustrate how cues were allocated in the preference framework of EFC's and their evaluations of work wear product assortments in South African department stores.

Work Wear Product Assortment Attributes

Extrinsic Cues | Intrinsic Cues

- Store
- Store Image
- Colour
- Style
- Fashionability
- Size
- Price
- Perceived Quality | Functional quality
- Brand
- Country of origin

Awareness & Search for work wear → Favourable Evaluation of assortment

Assortment evaluation process
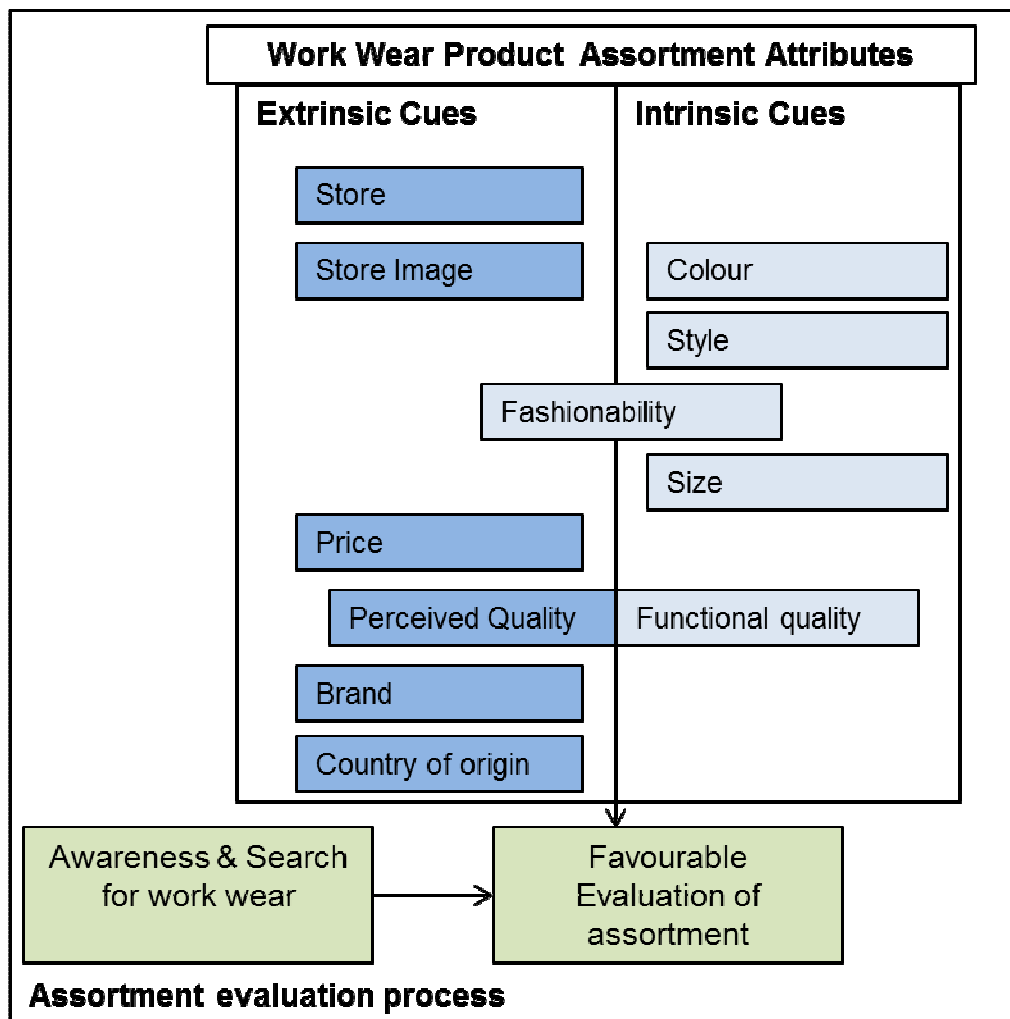
FIGURE 6.1:   REVISED CONCEPTUAL FRAMEWORK

In a way that is consistent with the diagnostic cues framework of Slovic and Lichtenstein (1971), the results of this study imply that consumers use cues when evaluating product assortments and when making purchasing decisions. Consumers also have preference frameworks, for which diagnostic cues are relatively more important in the evaluation and decision-making process. Consumers evaluate the work wear product assortment and base their purchasing decisions on the product attributes and cues set for the criteria (Jin et al., 2010: 180). In the discussion that follows, each of the products attributes and how they influence South African department stores will be discussed individually.

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6.4 DIAGNOSTIC CUES USED BY CONSUMERS TO EVALUATE PRODUCT ASSORTMENT

In this section the research results are discussed with regard to the viewpoint of the theoretical perspectives employed in the study. The discussion, conclusions and recommendations are presented according to the objectives set for the study. The first section deals with the intrinsic attributes of product assortment, which addresses objective 1) in terms of the relative importance of cues such as colour, style and size. The second section focuses on the extrinsic attributes of product assortment, which addresses objective 2) regarding the relative importance of cues such as store, image, price, brand, country of origin, quality and fashionability. Within each section the ranking of the attribute levels is also set out. The final section (objective 3) consists of a discussion about the ranking of both the intrinsic and extrinsic attributes when all attributes are taken into account in the consumer's preference structure towards work wear product assortments.

6.4.1 Relative importance of intrinsic attributes in ranked order (Objective 1)

The results of the study suggested that respondents mostly ranked extrinsic attributes at the top end of the list, followed by intrinsic attributes. The intrinsic attributes, however, still play a significant role in the preference structure, as can be seen in the revised conceptual framework (Figure 6.1) The following intrinsic attributes were favoured among the respondents:

6.4.1.1 Colour

The results suggest that colour was ranked as the most favoured relative intrinsic attribute when EFC's evaluate the work wear product assortments of department stores. Funk & Ndubisi (2006:42) found that colour was one of the key determinants when consumers make product choices. Previous research suggests that colour has the power to create a strong brand image, influence a consumer's decision making process and even change a shopper's mood (Ackay, Sable & Dalgin, 2012:1). The overall findings of Ackay et al. (2012:5) were that colour was a very important aspect in product choice for all individuals between the ages of 15-24 regardless of their gender or their demographic or economic background. Colour was ranked joint

second in importance of attributes at 14.9%. Previous research by Crozier (1999) suggests that colour is often linked to other attributes like fashionability and store image which fall within the category of extrinsic attributes. Crozier (1999) suggests that when colour is analysed it is often paired with another attribute when a product or product assortment is evaluated, either with an intrinsic or extrinsic attribute. In this research the possibility was explored that colour could exist in conjunction with store image or style and fashionability.

The colour attribute was split into 5 levels, namely neutral, bright, earth, seasonal and pastel. The highest ranking colour attribute level was for neutral colours with 6.5% and second to this were bright colours with 2.2%. The gap between these two colours is quite large and coincidentally these two colour spectrums are also very different from each other. The preference for neutral colours in this study corroborates the findings of Visser, *et al.* (2006:60) who, when evaluating the importance of store image among female consumers in South Africa, found that they preferred neutral and soft colours.

The type of product category (e.g. work wear) could also play a role in how female consumers evaluate apparel product assortment of department stores. There is a possibility that respondents chose neutral colours because of the association with typical corporate wear. In a study conducted by Ernest Nickels about the influence a uniform's colour had on citizens' impression of the police, it was found that citizens had positive evaluations of darker coloured uniforms than of lighter coloured uniforms (Nickels,2008:86). In contrast to their preference for neutral colours, respondents also favoured bright colours. Crozier (1999) argues that darker and brighter hues are consistently more favoured by consumers than lighter coloured hues. Crozier suggests that even though colour has significance in the natural world, it is not clear whether preferences for colour have an innate effect or whether consumers' responses towards colours are learned (Crozier, 1999:13).

The above findings are crucial for retailers to ensure that they have the correct colour mix in their work wear product assortments. These findings could also be useful for marketers and visual merchandisers to grab the EFC's attention through the use of colour. Retailers can implement this in their stores by analysing their target market's colour preferences towards apparel and including this information in their future

range planning. Visual merchandisers can also use the above information to ensure that neutral colours are merchandised together to create an aesthetically pleasing view of the work wear product assortment. Brand managers and marketers can use neutral colours with bright accents to attract the attention of target markets through advertising the product assortment

6.4.1.2 Style

In this research study, respondents ranked style above other commonly recognised attributes like price and brand when evaluating work wear. These findings were consistent with a study conducted by Herbst and Burger (2002), who found that style constituted 31.5% of attribute importance when young consumers evaluated fashion products (Herbst & Burger, 2002: 43). From the results it is evident that the EFC prefers to have a variety of styles available to choose from. Da Silva and Alwi (2008) found that consumers preferred a large variety of clothing in one store compared to stores who only specialize in one type of product. It is revealing that the attribute levels of tailored styles were ranked as last. Within a corporate working environment, tailored suits are usually associated with work wear. As this style was ranked last, this could be an indication that consumers within South Africa have a less formal approach to work wear.

The above findings are crucial for retailers who are looking to expand their product assortments in the work wear departments. The EFC consumer finds a variety of styles favourable and therefore the more styles available to the consumer; the more likely it is that the consumer will make a purchase. Store patronage is likely to increase among consumers once the variety of a product assortment which is available to the consumer is increased (Amine & Cadenat, 2003:488). Other suggestions would be for South African retailers to increase the variety they have in store in order to cater to the individual body types of the EFC market. Retailers and brand managers can target different female figure types (e.g. pear shaped, apple shaped or straight line figures) by offering a variety of product options for every consumer increasing the likelihood of a sale taking place in store.

6.4.1.3   Fashionability

Fashionability is often analysed from an intrinsic or an extrinsic perspective. Consumers will use fashionability as an extrinsic cue when they perceive the product assortment of a store to be fashionable or non-fashionable. As an intrinsic cue, the retailer uses fashionability to constantly update and change the design of their product assortment to fit in with the season's trends.

The EFC preferred classic styles and ranked this category as the highest when purchasing work wear. In a study by Holmlund et al. (2011) it was found that consumers' need for highly fashionable clothing will change based on factors in their demographic profile like age and gender. It is interesting that classic styles, stylish designs and elegant designs constituted 70.24% of the respondents' preferences despite the age range being between 20 and 60. All three of the above mentioned images in the questionnaire used to represent classic, stylish and elegant designs tie in with one another and can be referred to as timeless or basic products that are always in fashion. Another conclusion which can be drawn could be that EFCs perceive the corporate world of South Africa as being conservative in its approach to fashion and therefore the female emerging market would prefer more classic styles when purchasing work wear as opposed to modern and fashion products which were ranked at the bottom.

From an intrinsic perspective, retailers can constantly introduce new and updated forms of classic work wear to motivate consumers to make a purchase (Law et al., 2004: 362). This will encourage customers to visit the store more often as there will always be something new available for them to purchase, as found in a study by Holmlund et al. (2011:111). Marketers and brand managers can make use of the fashion adoption theory which suggests that a consumer's decision to purchase starts with an awareness of new fashion (Gam, 2010:180). When the consumer is constantly reminded that the style of a product assortment is constantly changing along with the fashionability of the product assortment the retailer will be able to attract more attention to their store and create a competitive advantage over competitor stores to drive up sales.

6.4.1.4　　　Size

Size was ranked in the lower part of the preference structure. This finding could firstly show that the EFC do not believe size to be important because they are content with the current sizing that is available in department stores in South Africa. Secondly it could indicate that consumers are not educated about their body types and therefore do not know what the correct sizes are for their body types are. According to research by Brown & Rice (2014:213), sizing plays a very important role in the retail industry, despite the low ranking it was given in this research study. Brown and Rice (2014:213) state that size could provide retailers with a competitive advantage, the size of a product represents a significant criterion in the evaluation of apparel and in addition to that well fitted clothing also increases sales and customer satisfaction. If the correct size is not available to the consumer a purchase will not be made. The findings of this research study indicate that consumers prefer a mix of all sizes with S/M/L with the highest percentage of 3.5%. The fact that consumers prefer a large mixture of sizing could mean that the current sizing in South African department stores is not standardized. The effect of this could be that some consumers have to buy different size garments, depending on the store they purchase them from.

If retailers could firstly find a way to standardize sizing across department stores and secondly offer a variety of fits for different body shapes and age groups, they could create a competitive advantage over other retailers. Yoo et al. (1999:220) found that a limited number of retailers cater for additional focus groups like petite, tall or plus size clothing. Within the South African retail sector there are certain speciality stores like Penny C and Donna Claire who provide clothing for plus size but this is not the norm within department stores. In the current South African retail sector, work wear is mass produced for the average/standard individual, therefore an opportunity exists for retailers to identify different body shapes and sizes to create a perfect fit for a garment. Retailers can ensure a better sizing and fit in their garments by establishing an experienced quality control team to draw up size specifications based on the target market.

6.4.2 Relative importance of extrinsic attributes in ranked order (Objective 2)

The results of the study suggested that respondents ranked the extrinsic attributes like store name and store image as the most relative important attributes when evaluating the product assortment in department stores (see Figure 6.1). Other extrinsic attributes like price, quality, band and country of origin were ranked below certain intrinsic cues in terms of relative importance.

6.4.2.1 Store name

Store name was ranked at the top of the preference structure for the EFC. The top three ranking store names were Woolworths at number one with 17.3%, Edgars in second place with 12% and Truworths in third place with 8.9%. The findings of the current study are consistent with previous research by Erdem, Oumlil & Tuncalp (1999:137) who found that store image or name was the most important determinant for shoppers patronising a store. In another study conducted by Dodds (1991) it was found that the store name had a direct influence on the perceived value and perceived price of a product. Dodds (1991) also found that cues like price, store image, brand and store information give the shopper a certain perception of the value of the product being offered to them. The store name or product name is often the first point of contact between a consumer and retailer and therefore becomes the key way in which the consumer remember the characteristics they perceive in a product or retailer (Hillenbrand, Alcauter, Cervantes & Barrios., 2013: 300).

The stores used in this research study were established department stores within the retail sector and the EFC had already established pre-formed notions about the name as well as the image of each of the stores. In a study conducted by Alserhan and Alserhan (2012) it was found that at a customer level the name of a store can influence a customer's attitude towards the company and the image of the brand, encourage brand loyalty and help create a clear and differentiated image of the store which cannot be explained purely by its attributes. The results of this study are consistent with the study by Alserhan and Alserhan (2012), while the top ranking store name (Woolworths) ties in with the top ranking store image (quality). These results are consistent with the retail offerings that are currently in the marketplace in South Africa with a store like Woolworths having built its brand around offering quality

products at affordable prices. More research is needed to determine how a store name can influence how consumers evaluate product attributes when they have pre-formed ideas about the stores being evaluated.

6.4.2.2   Store image

Store image was split into 6 levels; namely quality, exclusivity, convenience, value, fashion and discounts. Quality had the highest percentage preference at 3.6%. This finding corroborates the conclusion drawn by Visser *et al.* (2006:49) that the only way to differentiate one store from another is by creating a unique store image. Within the store name levels, Woolworths was ranked as the most preferred store name. Its brand image is to provide quality products at affordable prices. PEP, however, was ranked lowest within the category of store name attributes. This store has an image of providing lower quality products at discount prices. Thus, the conclusion can be reached that the emerging market female consumer would prefer a store with an image of quality and value rather than a low price discount store when purchasing work wear. It is possible that emerging market female consumers could have formed predefined notions about each of the stores used in this research study as these are stores that are currently in the South African retail market. Baker *et al.* (1994) suggest that when consumers do not have predefined notions about the service quality within a store they will use other product attributes to form a notion about the store. McGoldrick (2002) found there to be several attributes that contribute to the holistic store image of a department store. In this research, consumers could have used the store name as an attribute to evaluate the store image as the store names used in this research are already in the retail sector of South Africa and they therefore would already have pre-formed notions and ideas about the store image.

6.4.2.3   Price

Contrary to expectations, this study did not find that consumers thought price to be the driving factor when evaluating work wear apparel, as was the case in previous research studies like that of Wickliffe and Pysarchik (2001). It is somewhat surprising that price was rated as a low importance attribute (9.7%). There are several possible explanations for this result. The most likely is that when consumers chose store name and store image as the most important attributes they automatically focused on

prices. Stores like Woolworths, Edgars and Truworths are known for catering for specific consumers whose earnings fall within the same price bracket as the EFC. From this information it can be assumed that the EFCs are still very aware of price when purchasing work wear and prefer to purchase work wear from department stores with a low to medium price bracket. This contradicting result could indicated that the EFC prefer to purchase from stores that offer a payment plan or where clothing can be bought on credit. Holmlund et al. (2011) reiterate the findings of this research that price will take a backseat when other product attributes like style, store image etc. are visible. The EFC will therefore always search for the best price/quality ratio they can find before making a purchase. This will be useful for marketers as well as retailers in making sure that the ideal pricing strategy is in place to ensure the customer can purchase a good quality product at a reasonable price. Consumers are constantly researching information to find the best deals available and therefore also constantly modifying their purchase plans to pay as little as possible (Su, 2007:726). Marketers can use this information to place more emphasis on quality, style and colour when targeting customers rather than basing their advertising strategy on low prices. Another explanation could be that price is not seen as an important factor for the EFCs because they are willing to pay more for work wear than casual wear and are therefore not as price sensitive towards this category of clothing. The above was also found to be true in a study by Holmlund *et al.* (2011), who found that shoppers were willing to pay more for corporate office clothing than for casual day wear. Retailers can use this information to introduce a high end store brand of work wear clothing with an emphasis on quality and high performance clothing.

6.4.2.3 Quality

Quality can be seen as either intrinsic or extrinsic. In relation to this study the intrinsic dimension of quality refers to the functional performance of the product. From an extrinsic point of view quality refers to how the consumer perceives the quality of a product by utilizing other attributes like price, brand and store image to draw a conclusion about the quality of the product. Care (functional quality) was ranked second last with 5.6% within the preference structure. The highest ranking category within care was durable clothing with a percentage of 0.9%. Within this category, easy care was ranked last at -1.4%, indicating that the EFCs do not consider easy care to be an important level. One explanation for this could be that most EFCs work

full time and therefore do not deal directly with the care of the garments they purchase. Domestic workers are often employed to do this job in this market sector.

Marketers and retailers can emphasize the durability of the work wear in their product assortments by adding product guarantees to their garments. Retailers in South Africa could follow in the footsteps of big retailers like Marks and Spencer by introducing performance clothing within work wear. Performance clothing can be used to attract customers and increase sales through introducing performance features to clothing like non-iron, breathable, crease resistant and stain resistant clothing. All these features will increase the shelf life of a work wear product assortment.

6.4.2.4   Brand

Brand was ranked last with 5.6% in terms of store and designer brand availability within retail stores. These findings are not consistent with other studies like Herbst and Burger (2002) where Brand was ranked top of the list with 32.2%. The difference could be seen in situations such as those observed in Herbst and Burger's (2002) study, which was based on fashion products alone and did not include the whole product assortment within a product category, as was done in this study. It can be assumed that when the EFCs evaluate work wear, that brand may not as important compared to purchasing fashion clothing. EFCs ranked stores with in-store brands as well as designer brands at the highest level within this category at 1.9%. This is an indication that there is possible room for retailers to increase profits by providing customers with a bigger variety of designer and store brands. This shows that the EFC craves a variety of brands within department stores. As mentioned by Okonkwo (2007:9), consumers can form an emotional and a psychological attachment to a store through the use of branding. By incorporating both store and designer brands, retailers can increase the variety of products they offer to the consumer, which increases the probability of a sale taking place. This is consistent with Goldsmith *et al.*'s (2010:339) research who found that by incorporating store brands into a product assortment the efficiency of the consumer decision-making process is improved by offering a good quality product at a lower price than designer brands (Goldsmith *et al.* 2010:339).

6.4.2.5 Country of origin

This attribute was measured by posing a direct question to determine which country of origin the consumer prefers to purchase clothing from. Country of origin was not measured as a construct of the conjoint analysis, but formed part of the product attribute brand. Even though country of origin is an important factor in work wear product assortments, it is not usually seen as the most important attribute and was therefore analysed as a separate entity. From the results it is clear that almost half of the respondents (47.93%) preferred to purchase clothing made in South Africa. Secondly, respondents preferred clothing from Europe (30.58%) and lastly from China or India (20.66%). This is revealing, as the majority of clothing in the South African retail sector is currently imported from countries like India and China. One reason why consumers would prefer clothing produced in South Africa could be because of the 'Proudly South African' campaign, which was initiated in 1998 under the leadership of President Nelson Mandela. This campaign encouraged consumers to buy locally produced products and services to stimulate the local economy and create jobs. The masses of imports from International countries have put local factories under a lot of pressure and many are struggling to make a profit. The research indicates that the EFCs are patriotic and would prefer to support local businesses when purchasing apparel. Insch and Florek (2009) found that the use of national symbols on clothing may boost sales, especially when consumers have patriotic tendencies. It is recommended that South African retailers incorporate more local designers in their ranges as well as using locally produced garments to boost patriotism among consumers in the country. Marketers and brand managers can use the 'Proudly South African' concept as a marketing campaign to drive the sales of retailers.

6.4.3 Relative importance of intrinsic and extrinsic attributes in ranked order (Objective 3)

A total of eight attributes were included in the hypothetical pair-wise combinations given to respondents. The aim of this research was to find out which of these attributes ranked highest in consumer's preference level for work wear product assortments in South African department stores. By ranking each attribute from most important to least important, the researcher could get a clear view of which attributes

were most favourable to the consumer. The top ranking attribute was an extrinsic attribute, namely store name. Second was an extrinsic attribute, store image, and an intrinsic attribute, colour. From the research it is clear that one cannot say that extrinsic attributes are more important than intrinsic attributes because of the scattered results the researcher found. It can, however, be said that attributes are not ranked as homogenous entities but that each attribute has an influence on the other attributes and that no one attribute can be singled out as the most important for respondents when evaluating a product assortment. Each attribute will influence another as well as the product assortment on a different level to form the respondent's preference structure.

In a study conducted by Paulins and Geistelfeld (2003:371-385), researchers found that the product assortment in a store will influence shoppers and that a desirable product assortment is the key reason why a store will be patronised by shoppers. The main findings in this research study can be used to formulate recommendations and suggestions to retailers and marketing teams to form ideal product assortments that are based on customer preference. Based on the information gathered in this research study, an ideal product work wear assortment would be based on the attributes and attribute levels indicated in Table 6.1.

TABLE 6.1: STORE TEMPLATE FOR AN IDEAL WORK WEAR PRODUCT ASSORTMENT

ATTRIBUTE	LEVEL
IMAGE	QUALITY
COLOURS	NEUTRAL
STYLE	VARIED
SIZE	S/M/L
PRICE	LOW TO MEDIUM
CARE	DURABLE
BRAND	STORE AND DESIGNER BRANDS

Table 6.1 is a representation of what an ideal work wear product assortment should look like when retailers cater for EFCs based on this research study. Retailers and marketers could use this as a guideline for the season when planning ranges relating to female work wear and pricing strategies. Product assortment planning is a vital process in the retail sector as it ensures there will be sufficient stock holding during peak and low periods of the season (Gajanan *et al.*, 2007:138). The aim of having a

good product assortment is to generate a good profit and maximize the retailers' sales. Through identifying which attributes are important to the target market, the retailer will be able to focus product assortments on specific criteria that will attract customers and drive sales. Ideally South African retailers should follow in the footsteps of major American retailers like Wall-mart, which consider the consumers' preference for a product assortment and focus on key attributes that most appeal to the customer when implementing category management and product assortment planning (Gajanan *et al.*, 2007:136).

In this study, when consumers evaluated style, size and brand, the consistent trend was that they preferred to have some sort of variety or option when it came to these attributes. With regard to style, consumers preferred to have varied options available to them, which is consistent with the findings of Tang and Yam (1996:24) who found that demand exists because consumers' preferences are often heterogeneous and that each individual seeks variety within their own acquisitions. Within the category of size there was also a preference to have all the size categories of small, medium and large, indicating that there is a need for the consumer to have a variety of options available and also that EFCs have very diverse bodies and therefore require many different sizes. When the EFC analysed brand as a product attribute it was again shown that they preferred a variety of brands in the store, including designer brands as well as in-store brands. These results are consistent with the findings of Tang and Yam (1996) and show that the EFC prefer to have a variety of options available.

6.5   THE RESEARCH IN RETROSPECT

Background planning: The initial topic of interest was thoroughly researched by the researcher. This involved a study and analysis of the relevant and current literature of emerging markets and the evaluation of product assortments to formulate the problem statement and research objectives appropriate for this field of study. This topic, with its specific focus on South African department stores and emerging market female consumers, had not received much attention in the previous literature, so relevant literature specifically aimed at this sample was difficult to locate. Despite

these drawbacks, there was a great deal of literature centred on other countries' emerging markets and how they experienced product assortments which helped them draw conclusions about these assortments. After the literature was analysed and gathered, an online questionnaire was developed with the help of a focus group to ensure that the concepts measured were logical and easily understandable and that there were no leading questions that could influence respondents. The questionnaire was uploaded onto an internet based platform with the help of an online software programme called Online Surveys. Images were developed in conjunction with a graphic designer to ensure that all concepts were explained logically and were easily relatable to respondents through the use of visuals. The questionnaire was distributed through emails and online social media platforms like Linkedin and Facebook. A cover letter accompanied the online questionnaire in which the purpose of the study was briefly explained, with regard to the time it took to complete the questionnaire and lastly to ensure the confidentiality of all respondents taking part in the study. It was also stated in the cover letter that any information gathered from the research study would be used solely within an academic context for the University of Pretoria. The questionnaire was subjected to a pilot test to rectify any negative feedback and ensure that all errors were eliminated before distribution. The questionnaire was approved by the Natural and Agricultural Sciences Ethics Committee and once approval was granted, the data collection began.

Data Analysis The researcher received 121 usable questionnaires back from respondents and the researcher coded them with the help of Excel. The findings were decoded through the use of Sawtooth Software© and the assistance of the statistical department of the University of Pretoria. The research objectives were met to the satisfaction of the researcher within the limitations as explained in this chapter, and the findings were presented with the use of table and graphs.

6.6   LIMITATIONS OF THE RESEARCH

There were several recognizable limitations of this research study. It is reasonable to assume that the results of this research study would change if both males and females were included in the study. The most prominent limitation was that the

sample only included respondents living in the Gauteng area, which indicates that this sample did not provide a fair representation of all emerging market female consumers living in South Africa. The sample used for this research was appropriate for the purpose of this study, as Gauteng is a capital province within South Africa, where many emerging market consumers reside. Further research is required in other South African cities to determine whether location may have an impact on the emerging market female consumers' preference towards work wear product assortments. Secondly, this research was only focused on female consumers. If male consumers are considered in a study the results may change. Female respondents were deemed appropriate for this study because they are the main shoppers for apparel in South Africa. More research on this topic needs to be undertaken so that the impact of male and female consumers' evaluation of work wear product assortments can be more clearly understood.

Completion of the conjoint study questionnaire was time-consuming, taking respondents between 15-20 minutes to complete due to the large number of images and information that needed to be read on the pair wise profiles. Respondents were, however, notified in the introductory letter about the time that it would take to complete the questionnaire. The findings concurred with similar studies and therefore there was no concern about the validity and the findings of the study.

The conjoint questionnaire was distributed via the internet. This caused several limitations within the geographical spectrum of South Africa. Internet distribution is still in its infant form compared to other countries like the UK and the USA. The majority of South African consumers do not have access to the internet at home and used the office to complete the questionnaire. It is not advantageous to use the internet to conduct research within South Africa as there is no way of telling whether respondents will have access to it.

The results of this study cannot be generalised to the larger SA population and are limited to this study.

6.7 RECOMMENDATIONS FOR FUTURE STUDIES

This study touched on how the female emerging market consumer evaluates work wear product assortments within South African department stores. The combination of findings in this research provide some support for the conceptual premise that product attributes are diagnostic and influence one another. The following opportunities for future research were identified for future studies during the completion of the research process:

From the findings it is evident that store name as well as store image is seen as the most important product attribute when evaluating a product assortment. One of the issues that emerged from these findings is that past experiences may play a significant role in how emerging market female consumers evaluate product assortments. Further research is needed to establish how past experiences and the influence of family and friends affect consumers' patronage of a retail store.

Further research could also be conducted on this topic by including male shoppers in a research study. This would give researchers a more comprehensive view of how emerging markets evaluate product assortments. One implication of this is the possibility that male and female consumers evaluate product assortments differently and that marketers may have to promote different product attributes to get the right audience.

The research could be repeated including a bigger geographical area to investigate whether there would be significant differences in terms of how consumers evaluate product assortments within department stores. Including rural consumers in the questionnaire could possibly yield different results. A study could be conducted in a broader South African context instead of focusing only on the region of Gauteng.

The design of a conjoint analysis questionnaire can be very complex, as there are often too many options available to the consumer and respondents resort to simplification strategies that could influence the validity of the data. To avoid this, a researcher should limit the number of attributes used in the study and test the

questionnaire to ensure that it is user friendly. This would ensure a more focused and accurate study.

The method used in this study was a quantitative approach. Another recommendation would be to conduct a study that is solely qualitative and that could offer more in-depth insight into how consumers evaluate work wear product assortments. This study could provide more knowledge of how respondents differentiate between intrinsic and extrinsic products and use them when developing their preferences towards product assortments.

6.8   IMPLICATIONS OF THE STUDY

This study has practical implications for retailers, marketers, brand managers and consumer researchers who take responsibility for the education of consumers. The findings in this research study will add to the existing, if rather limited, body of literature regarding evaluations of product assortments in the South African retail sector. When consumers evaluate work wear products, assortment attributes are classified as either intrinsic or extrinsic. From the research we found that cues cannot be seen as homogenous, but should be regarded as a whole when analysing the preference structure of the female emerging market consumer. Therefore, from a theoretical perspective the female emerging market consumer's satisfaction or dissatisfaction with a product assortment is determined by both intrinsic as well as extrinsic cues, thus contributing to the current research about the topic.

Emerging market female consumers were more favourable to extrinsic product attributes like store name and store image compared to other extrinsic attributes like price, brand and country of origin. Since the retailer store names used in this research study are established retailers in the South African department store sector, previous experience with, or knowledge of these stores and consumers' product associations with the stores cannot be ignored and should be taken into consideration when analysing the research. Such research can give retailers a directive to focus on store name and store image and the attribute levels that were ranked highest in these attribute categories need to be taken into consideration.

6.9   FINAL CONCLUSION

This research was motivated by an interest in determining how the female emerging market consumer evaluates work wear product assortments in the department stores of South Africa by using the conjoint analysis method to rank product attributes of the product assortments. The specific purpose of the research was to differentiate between respondents' preference towards intrinsic or extrinsic cues. Based on the cue diagnostic, a conceptual framework was developed with objectives regarding the effects of intrinsic and extrinsic product attributes on the evaluation process of a product assortment.

The competition of the retail sector is now increasing to new levels, forcing retailers to develop effective competitive strategies to gain a competitive advantage. Differentiation through offering an exclusive product assortment to customers can be seen as a strategy that can accommodate the specific product attributes of the retailers and to better meet the needs of a specific target group like the emerging market female consumers.   When identifying the needs of consumers through product assortment, this research proposes the use of the conjoint analysis methods for analysing and determining consumer preferences.

From this study it is evident that conjoint analysis can be used to identify the key product attributes that emerging market female consumers find important when evaluating a product assortment. This research was based on a smaller sample in a certain region in South Africa; therefore it is important that further research is conducted on this topic to gain more insight into the evaluation process of this emerging market group. The findings of this study are significant to both retailers as well as marketers. Marketers benefit by aiming advertising at the specific product attributes that are important to customers. Retailers can drive profits and sales by using the findings in this research to target specific consumers by making sure the right product assortment with the right product attributes are available in store. When retailers are able to identify the needs of their customers, they can supply products that will enhance a consumer's desired outcome (Wickliffe & Pysarchik, 2001:99). Despite the limitations discussed previously, the aims of this study were met. The study adds value, knowledge and insight to the existing knowledge based on the

evaluation process of emerging market consumers. This research will be useful for researchers as well as industry role players who want to improve marketing campaigns, product assortments and retail settings.

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ADDENDUM A: QUESTIONNAIRE

Copy of Masters Survey

Dear Respondent,

I am currently enrolled for my Masters degree at the University of Pretoria in the field of Clothing Retail Management. The subject of my research dissertation is how consumers use diagnostic cues in the evaluation of department stores apparel product assortment. I would value your opinion as part of my research and would appreciate it if you could find time to complete the attached questionnaire. It will take approximately 20 minutes to complete; there are no right or wrong answers and your honest opinion will be appreciated. The questionnaire consists of a number of sections, please read the instruction at each section before you indicate your answer. Every question must be answered for the questionnaire to be useful, you are requested to fill in the questionnaire as freely and honestly as possible. All answers provided by you will be treated as private and confidential.

With the questionnaire we will attempt to collect data in the context of an experimental study which means that the product assortments and the product assortment characteristics that are included in the questionnaire are fictitious. You will therefore not necessarily find a product assortment in the market place with the combination of characteristics that have been presented to you for your decision as to whether you would purchase from such an assortment or not.

Thank you very much for your time and cooperation.

Yours sincerely,
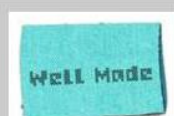
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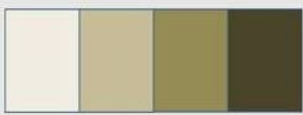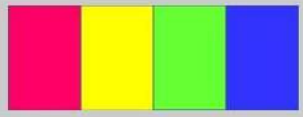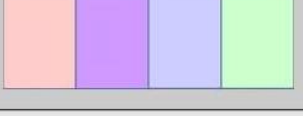
If you have any questions, you are more than welcome to ask now or contact me, Lizet Bezuidenhout at (+44)07582865684 or e-mail me at lizet_botha@hotmail.com.

1. I hereby give my consent that I am taking part in this study by my own free will.	
Yes	
No	

What follows are definitions of apparel assortment characteristics including STYLES, PRICE RANGES, SIZES, BRANDS, PRODUCT CARE, COLOURS and RETAIL STORE IMAGES which you would probably consider when you intend buying <u>Work Wear</u> from a particular department store

	Designer Brands (National Brands): Expensive, high-end or well known brands that are sold in individual or department stores e.g. Levi's, Guess or Jeep.
	In-store brands (Private Brands): Brands that are developed and owned by the retailer and are sold only by the retailer. Brands that form part of the retailer e.g. RED at Mr Price, Studio W at Woolworths.
	Variety of brands: A mix of designer and in-store brands in a department store.

	Easy Care: Fabrics that are restored to their original appearance after machine washing, with little or no ironing required.
	Well made: Clothing that is properly constructed and neatly finished resulting in an aesthetically appealing appearance.
	Durable: Clothing that lasts for an adequate period of time considering normal wear and care.

	Neutral Colours: Colours that blend with all colour groups and are used as basic e.g. black, white, stone and grey.
	Bright Colours: Intense, vivid colours that are very visible e.g. red, pink, orange.
	Seasonal Colours: Current colours that are on trend e. g. yellow and tangerine.
	Muted Pastel Colours: soft hue, dusty and pale colours e.g., baby blue, lilac.
	Earth tones: Colours similar to colours of the earth e.g. sand, rust, brown.
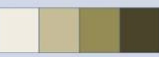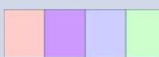
DISCOUNT	**Discount image:** Stores that offers lower prices than other stores and often have sales.
FASHIONABLE	**Fashionable image:** Stores that are known for stocking the most current fashion trends in clothing. Stores that are known for offering clothing that are popular and currently in fashion.
CONVENIENCE	**Convenience image:** Stores that emphasize one-stop shopping and offer services and products that are readily available at all times.
EXCLUSIVE	**Exclusive image** Stores that stock clothing that is exclusively available only at the specific department store.
QUALITY	**Quality image:** Stores that are perceived by consumers to offer clothing of excellent standard and worth.
VALUE ORIENTATED	**Value oriented image:** Stores that offer products or services at a reasonable price or have regular special promotions e.g. buy one get one free.

	Standard sizes: Sizes from an average sizes curve e.g. 8-16 or 32-40.
	Plus sizes: Sizes for fuller figures e.g. 18 and up wards or 42 and up wards.
	Petite sizes: Sizes for proportionally smaller figures e.g. smaller than an a size 8 or smaller than size 32.

	EDGARS.
	WOOLWORTHS.
	TRUWORTHS.
	ACKERMANS.
	PEP.
	STUTTAFORDS.

	Casual Styles: Clothing that is a comfortable fit .Ex Jeans and T-shirt.
	Classic Styles: A style or design that satisfies a basic need and remains in demand even though minor changes may be made. Ex blazer, white t-shirts.
	Tailored Styles: structured and semi-structured suits, overcoats, trousers, skirts and jackets. Ex suit.
	Trendy Styles: The style of the moment, the trends that are currently available in stores. Ex Playsuit.
	Variety of Styles: A mixture of styles available in one store.
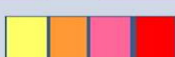
What follows is a **PAIRWISE** presentation of assortment offerings differing in respect of STYLES, COLOURS, SIZES, PRICE RANGES, BRANDS, PRODUCT CARE, DEPARTMENT STORE and RETAIL IMAGES …

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where <u>1 is strongly prefer the left option</u> and <u>9 is strongly prefer the right option</u>.

2.

	Left		Right	
	Tailored Styles	VS	Variety of Styles	
	Neutral Colours		Muted Pastel Colours	
	Standard, Plus and petite sizes		Standard and plus sizes	
	Moderate to expensive prices		Low to Moderate prices	
	In store brands		In store and designer Brands	
	Well made		Easy Care	
	Exclusive		Convenience	
	Woolworths		Ackermans	

1	2	3	4	5	6	7	8	9

3.

	Left		Right	
	Casual Styles	VS	Trendy Styles	
	Neutral Colours		Seasonal Colours	
	Standard and petite sizes		Standard sizes	
	Low to Moderate prices		Expensive to very expensive prices	
	In store and designer Brands		Designer Brands	
	Easy Care		Well made	
	Value oriented		Convenience	
	Stuttafords		Woolworths	

1	2	3	4	5	6	7	8	9

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where 1 is strongly prefer the left option and 9 is strongly prefer the right option.

4.
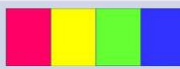
Variety of Styles		VS	Tailored Styles	
Seasonal Colours			Muted Pastel Colours	
Standard, Plus and petite sizes			Standard sizes	
Low to Moderate prices			Expensive to very expensive prices	
Designer Brands			In store brands	
Well made			Easy Care	
Exclusive			Value oriented	
Truworths			Woolworths	

1	2	3	4	5	6	7	8	9

5.
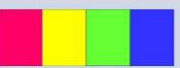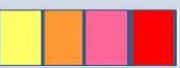
Tailored Styles		VS	Classic Styles	
Earth Tones			Bright Colours	
Standard and petite sizes			Standard and plus sizes	
Low to Moderate prices			Expensive to very expensive prices	
In store brands			In store and designer Brands	
Durable			Well made	
Discount			Quality	
Truworths			Stuttafords	

1	2	3	4	5	6	7	8	9

136

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where 1 is strongly prefer the left option and 9 is strongly prefer the right option.

6.
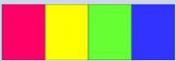
Tailored Styles	VS	Classic Styles
Earth Tones		Bright Colours
Standard and petite sizes		Standard and plus sizes
Low to Moderate prices		Expensive to very expensive prices
In store brands		In store and designer Brands
Durable		Well made
Discount		Quality
Truworths		Stuttafords

1	2	3	4	5	6	7	8	9

7.

Trendy Styles	VS	Casual Styles
Bright Colours		Seasonal Colours
Standard and petite sizes		Standard and plus sizes
Low to Moderate prices		Moderate to expensive prices
In store and designer Brands		Designer Brands
Well made		Easy Care
Quality		Exclusive
Stuttafords		Truworths

1	2	3	4	5	6	7	8	9

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where 1 is strongly prefer the left option and 9 is strongly prefer the right option.

8.

1	2	3	4	5	6	7	8	9

9.

1	2	3	4	5	6	7	8	9

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where **1 is strongly prefer the left option** and **9 is strongly prefer the right option**.

10.

Left		Right
Casual Styles	VS	Variety of Styles
Muted Pastel Colours		Seasonal Colours
Standard and petite sizes		Standard and plus sizes
Moderate to expensive prices		Expensive to very expensive prices
Designer Brands		In store and designer Brands
Well made		Easy Care
Convenience		Value oriented
Stuttafords		Pep

1	2	3	4	5	6	7	8	9

11.

Left		Right
Variety of Styles	VS	Classic Styles
Muted Pastel Colours		Earth Tones
Standard, Plus and petite sizes		Standard and plus sizes
Expensive to very expensive prices		Low to Moderate prices
Designer Brands		In store and designer Brands
Easy Care		Durable
Convenience		Fashionable
Pep		Edgars

1	2	3	4	5	6	7	8	9

139
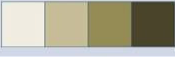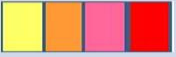
12. What is your approximate total monthly HOUSEHOLD INCOME?	
Less than R5000	
R 5001-R7000	
R 7001-R10 000	
R10 001-R15 000	
R15 001-R20 000	
R20 001-R25 000	
More than R25 000	

13. At which department store do you mostly shop for work wear?	
PEP	
Ackermans	
Truworths	
Edgars	
Woolworths	
Stuttafords	
Other (Please Specify):	
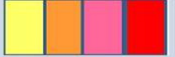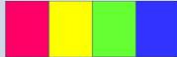
14. Please indicate your race or Ethnicity.	
Caucasian (White)	
Black (African)	
Asian	
Indian	
Mixed race	
Other (Please Specify):	

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where **1 is strongly prefer the left option** and **9 is strongly prefer the right option**.

15.
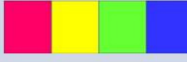
Classic Styles				Casual Styles
Neutral Colours				Seasonal Colours
Standard and petite sizes		VS		Standard, Plus and petite sizes
Expensive to very expensive prices				Low to Moderate prices
Designer Brands				In store brands
Easy Care				Durable
Value oriented				Quality
Truworths				Ackermans

1	2	3	4	5	6	7	8	9

16.

Trendy Styles				Classic Styles
Seasonal Colours				Bright Colours
Standard and plus sizes				Standard, Plus and petite sizes
Low to Moderate prices		VS		Expensive to very expensive prices
In store brands				In store and designer Brands
Well made				Durable
Quality				Exclusive
Pep				Ackermans

1	2	3	4	5	6	7	8	9

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where **1 is strongly prefer the left option** and **9 is strongly prefer the right option**.

17.

1	2	3	4	5	6	7	8	9

18

1	2	3	4	5	6	7	8	9

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where 1 is strongly prefer the left option and 9 is strongly prefer the right option.

19.

Left Option		Right Option
Variety of Styles	VS	Trendy Styles
Earth Tones		Seasonal Colours
Standard sizes		Standard and petite sizes
Low to Moderate prices		Expensive to very expensive prices
Designer Brands		In store brands
Durable		Easy Care
Fashionable		Discount
Woolworths		Stuttafords

1	2	3	4	5	6	7	8	9

20.

Left Option		Right Option
Classic Styles	VS	Variety of Styles
Bright Colours		Muted Pastel Colours
Standard sizes		Standard and plus sizes
Expensive to very expensive prices		Low to Moderate prices
In store and designer Brands		In store brands
Easy Care		Durable
Discount		Value oriented
Pep		Woolworths
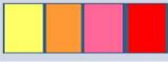
1	2	3	4	5	6	7	8	9

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where <u>1 is strongly prefer the left option</u> and <u>9 is strongly prefer the right option</u>.

21.

Classic Styles	Variety of Styles
Seasonal Colours	Neutral Colours
Standard, Plus and petite sizes	Standard sizes
Expensive to very expensive prices	Moderate to expensive prices
Designer Brands	In store brands
Well made	Easy Care
Value oriented	Discount
Ackermans	Pep

1	2	3	4	5	6	7	8	9

22.
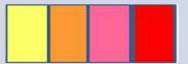
Variety of Styles	Casual Styles
Seasonal Colours	Neutral Colours
Standard sizes	Standard and plus sizes
Moderate to expensive prices	Low to Moderate prices
In store and designer Brands	Designer Brands
Well made	Easy Care
Value oriented	Convenience
Ackermans	Edgars

1	2	3	4	5	6	7	8	9

144

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where **1 is strongly prefer the left option** and **9 is strongly prefer the right option**.

23.
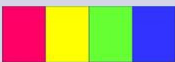
	Trendy Styles	VS		Casual Styles
	Neutral Colours			Muted Pastel Colours
	Standard, Plus and petite sizes			Standard and petite sizes
	Moderate to expensive prices			Expensive to very expensive prices
	In store brands			Designer Brands
	Easy Care			Well made
	Fashionable			Discount
	Stuttafords			Edgars

1	2	3	4	5	6	7	8	9

24.

	Classic Styles	VS		Trendy Styles
	Earth Tones			Seasonal Colours
	Standard and plus sizes			Standard, Plus and petite sizes
	Expensive to very expensive prices			Moderate to expensive prices
	In store brands			In store and designer Brands
	Well made			Easy Care
	Quality			Fashionable
	Pep			Woolworths

1	2	3	4	5	6	7	8	9

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where <u>1 is strongly prefer the left option</u> and <u>9 is strongly prefer the right option</u>.

25.

1	2	3	4	5	6	7	8	9

26. What is your HIGHEST level of education?	
Grade 12 (Matric)	
Company Training	
Diploma	
Tertiary degree	
Masters	
Other (Please Specify):	

27. What was your age at your last birthday?
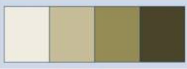
28. When I buy work wear, I prefer clothes that are	
Made China/India	
Proudly South African	
Made in Europe	
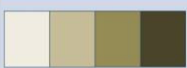
146

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where **1 is strongly prefer the left option** and **9 is strongly prefer the right option**.

29.

Left						Right		
Trendy Styles						Casual Styles		
Neutral Colours						Earth Tones		
Standard and plus sizes						Standard sizes		
Moderate to expensive prices			VS			Low to Moderate prices		
Designer Brands						In store and designer Brands		
Durable						Easy Care		
Discount						Exclusive		
Ackermans						Truworths		

1	2	3	4	5	6	7	8	9

30.

Left						Right		
Trendy Styles						Casual Styles		
Neutral Colours						Earth Tones		
Standard and plus sizes						Standard sizes		
Moderate to expensive prices			VS			Low to Moderate prices		
Designer Brands						In store and designer Brands		
Durable						Easy Care		
Discount						Exclusive		
Ackermans						Truworths		

1	2	3	4	5	6	7	8	9

147

Please consider each pair of **ASSORTMENT OFFERINGS** below and indicate your choice (X), where <u>1 is strongly prefer the left option</u> and <u>9 is strongly prefer the right option</u>

31.

Left		Right
Variety of Styles	VS	Classic Styles
Bright Colours		Muted Pastel Colours
Standard sizes		Standard, Plus and petite sizes
Expensive to very expensive prices		Moderate to expensive prices
In store brands		In store and designer Brands
Durable		Well made
Quality		Convenience
Truworths		Pep
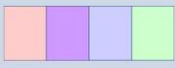
1	2	3	4	5	6	7	8	9
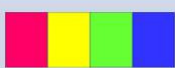
32. Please indicate your gender	
Male	
Female	

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where 1 is strongly prefer the left option and 9 is strongly prefer the right option

33.

Left		VS	Right	
	Tailored Styles			Variety of Styles
	Muted Pastel Colours			Earth Tones
	Standard and plus sizes			Standard sizes
	Moderate to expensive prices			Low to Moderate prices
	In store and designer Brands			Designer Brands
	Durable			Well made
	Fashionable			Value oriented
	Truworths			Stuttafords

1	2	3	4	5	6	7	8	9

34.
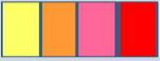
Left		VS	Right	
	Trendy Styles			Variety of Styles
	Bright Colours			Earth Tones
	Standard sizes			Standard, Plus and petite sizes
	Low to Moderate prices			Expensive to very expensive prices
	Designer Brands			In store brands
	Durable			Well made
	Value oriented			Quality
	Pep			Edgars

1	2	3	4	5	6	7	8	9

149

35. Please choose the wording that best describes the stores you prefer to buy work wear in. Stores that stock _____ clothing.	
Fashionable	
Classic	
Modern	
Stylish	
Elegant	

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where <u>1 is strongly prefer the left option</u> and <u>9 is strongly prefer the right option</u>.

36.

1	2	3	4	5	6	7	8	9

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where 1 is strongly prefer the left option and 9 is strongly prefer the right option

37.

Left	Right
Casual Styles	Tailored Styles
Neutral Colours	Bright Colours
Standard and petite sizes	Standard, Plus and petite sizes
Expensive to very expensive prices	Low to Moderate prices
In store brands	Designer Brands
Well made	Easy Care
Fashionable	Quality
Ackermans	Truworths

1	2	3	4	5	6	7	8	9

38.

Left	Right
Classic Styles	Tailored Styles
Earth Tones	Neutral Colours
Standard, Plus and petite sizes	Standard and petite sizes
Moderate to expensive prices	Low to Moderate prices
In store brands	In store and designer Brands
Easy Care	Durable
Fashionable	Exclusive
Edgars	Woolworths

1	2	3	4	5	6	7	8	9

151

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where <u>1 is strongly prefer the left option</u> and <u>9 is strongly prefer the right option</u>

39.

Left			Right
Classic Styles			Trendy Styles
Bright Colours			Neutral Colours
Standard and petite sizes			Standard, Plus and petite sizes
Moderate to expensive prices	VS		Expensive to very expensive prices
In store brands			In store and designer Brands
Durable			Well made
Convenience			Value oriented
Pep			Truworths

1	2	3	4	5	6	7	8	9
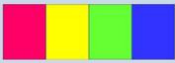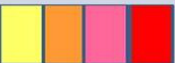
40.

Left			Right
Trendy Styles			Classic Styles
Earth Tones			Neutral Colours
Standard and petite sizes			Standard sizes
Low to Moderate prices	VS		Moderate to expensive prices
Designer Brands			In store brands
Easy Care			Durable
Exclusive			Discount
Pep			Truworths
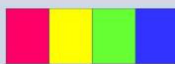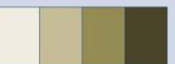
1	2	3	4	5	6	7	8	9

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where <u>1 is strongly prefer the left option</u> and <u>9 is strongly prefer the right option</u>

41.
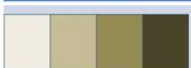
Casual Styles	Tailored Styles
Bright Colours	Seasonal Colours
Standard, Plus and petite sizes	Standard sizes
Low to Moderate prices	Moderate to expensive prices
In store and designer Brands	Designer Brands
Well made	Durable
Discount	Exclusive
Woolworths	Stuttafords

1	2	3	4	5	6	7	8	9

42.
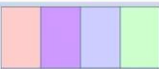
Casual Styles	Tailored Styles
Bright Colours	Neutral Colours
Standard and plus sizes	Standard, Plus and petite sizes
Moderate to expensive prices	Low to Moderate prices
In store and designer Brands	Designer Brands
Well made	Easy Care
Exclusive	Quality
Woolworths	Ackermans

1	2	3	4	5	6	7	8	9

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where **1 is strongly prefer the left option** and **9 is strongly prefer the right option**

43.
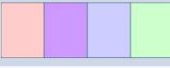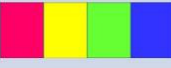
Left	Right
Tailored Styles	Trendy Styles
Neutral Colours	Muted Pastel Colours
Standard and plus sizes	Standard, Plus and petite sizes
Moderate to expensive prices	Expensive to very expensive prices
Designer Brands	In store brands
Easy Care	Durable
Quality	Fashionable
Ackermans	Pep

1	2	3	4	5	6	7	8	9

44.

Left	Right
Tailored Styles	Classic Styles
Muted Pastel Colours	Seasonal Colours
Standard, Plus and petite sizes	Standard and petite sizes
Expensive to very expensive prices	Low to Moderate prices
Designer Brands	In store brands
Easy Care	Durable
Discount	Convenience
Edgars	Truworths

1	2	3	4	5	6	7	8	9

Please consider each pair of ASSORTMENT OFFERINGS below and indicate your choice (X), where 1 is strongly prefer the left option and 9 is strongly prefer the right option

45.

Classic Styles			Tailored Styles		
Muted Pastel Colours			Bright Colours		
Standard sizes			Standard and petite sizes		
Expensive to very expensive prices			Moderate to expensive prices		
Designer Brands			In store and designer Brands		
Easy Care			Durable		
Exclusive			Convenience		
Ackermans			Edgars		

1	2	3	4	5	6	7	8	9

46. As a token of my appreciation for your participation, there will be a lucky draw on 30 June 2012 where you can win a prize . Should you wish to enter the lucky draw, please enter your cell number only into the box.
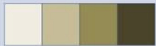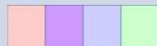
ADDENDUM B: RESULTS OF PROFILES FROM QUESTIONNAIRE

Selection of preferred profiles

In the following tables, the descriptive results are presented for the pair-wise profiles of assortment offerings, as prearranged in the questionnaire. Included in the profiles are the cues or product assortment attributes such as style, colour, size, price, brand, product care (quality), department store names and retail image. Within each of the profiles there are also a group of levels to further analyse each attributes and break it down into different categories. The reporting of the results is based on the degree to which the respondents most preferred a profile. A one (1) would indicate a strong preference for the left profile and a nine (9) would indicate a strong preference for the right profile. The results for the 1-9 scale were given in the same order as in which they were selected by the participants.

Tables B.1-B.35 summarises the results for the respondents' preferred profiles in terms of cues/attributes related to work-wear. The frequencies and percentages are presented below the pair-wise profiles to indicate the choice most preferred by the participants. In the tables the reporting is only on the responses for 1 and 2 (preference for left profile) and 8 and 9 (preference for right profile).
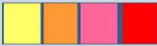
Pair-wise Profiles and Frequency Table B.1 for Q2

Q/Profile2	1	2	3	4	5	6	7	8	9
Frequencies	34	12	22	5	7	13	13	7	8
%	28.1	9.92	18.28	4.13	5.79	10.74	10.74	5.79	6.61

Over a third of the participants (38.02%) selected the left profile and only 12.4% of the participants selected the right profile.
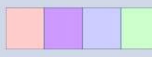
Pair-wise Profiles and Frequency Table B.2 for Q3

Q/Profile3	1	2	3	4	5	6	7	8	9
Frequencies	15	18	13	13	7	13	16	12	19
%	12.3	14.8	10.74	10.74	5.78	10.74	13.22	9.91	15.7

27.1% of respondents preferred the option on the left as opposed to 25.61% of respondents that preferred the option on the right.
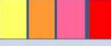
Pair-wise Profiles and Frequency Table B.3 for Q4

Q/Profile4	1	2	3	4	5	6	7	8	9
Frequencies	30	15	21	12	9	7	6	10	11
%	24.7	12.3	17.3	9.9	7.4	5.7	4.9	8.2	9.0

Over a third (37%) of respondents preferred the left hand table to the right hand (17.2%) option.
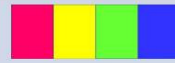
Pair-wise Profiles and Frequency Table B.4 for Q5

Q/Profile5	1	2	3	4	5	6	7	8	9
Frequencies	19	13	19	15	7	9	13	7	19
%	15.7	10.7	15.7	12.3	5.7	7.4	10.7	5.7	15.7

26.4% of respondents preferred the option on the left as opposed to 21.4% that preferred option on the right.
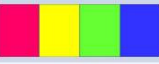
Pair-wise Profiles and Frequency Table B.5 for Q6

Q/Profile 6	1	2	3	4	5	6	7	8	9
Freq	16	15	21	12	10	9	9	9	20
%	13.2	12.3	17.3	9.9	8.2	7.4	7.4	7.4	16.5

25.5% of respondents preferred the option on the left as opposed to 23.9% that preferred option on the right.
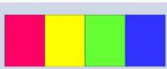
Pair-wise Profiles and Frequency Table B.6 for Q7

Q/Profile 7	1	2	3	4	5	6	7	8	9
Freq	17	14	21	9	9	9	13	6	23
%	14.0	11.5	17.3	7.4	7.4	7.4	10.7	4.9	19.0

25.5% of respondents preferred option on the left as opposed to 23.9% of respondents that preferred option on the left.
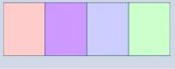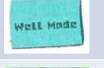
Pair-wise Profiles and Frequency Table B.7 forQ8

	Casual Styles		Variety of Styles
	Earth Tones		Bright Colours
	Standard and plus sizes		Standard and petite sizes
	Moderate to expensive prices	VS	Low to Moderate prices
	In store and designer Brands		In store brands
	Durable		Easy Care
	Discount		Exclusive
	Stuttafords		Edgars

Q/Profile 8	1	2	3	4	5	6	7	8	9
Frequencies	14	14	11	4	11	9	21	12	25
%	11.5	11.5	9.0	3.3	9.0	7.4	17.3	9.9	20.6

30.5% of respondents preferred the right hand option compared to 23% that preferred the left option.
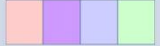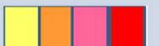
Pair-wise Profiles and Frequency Table B.8 for Q9

	Tailored Styles		Casual Styles
	Muted Pastel Colours		Earth Tones
	Standard sizes		Standard and petite sizes
	Low to Moderate prices	VS	Moderate to expensive prices
	In store and designer Brands		Designer Brands
	Well made		Durable
	Convenience		Quality
	Edgars		Woolworths

Q/Profile 9	1	2	3	4	5	6	7	8	9
Frequencies	15	17	9	9	11	17	12	9	22
%	12.3	10.4	7.4	7.4	9.0	14.0	9.9	7.4	18.1

25.5% of respondents preferred the right hand option compared to 22.7% that preferred the left hand option.

Pair-wise Profiles and Frequency Table B.9 for Q10

Q/Profile 10	1	2	3	4	5	6	7	8	9
Frequencies	21	17	20	12	8	8	10	9	16
%	17.3	14.0	16.5	9.9	6.6	6.6	8.2	7.4	13.2

31.3% preferred the left option as opposed to 20.6% that preferred the right option.
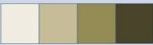
Pair-wise Profiles and Frequency Table B.10 for Q11

Q/Profile 11	1	2	3	4	5	6	7	8	9
Frequencies	5	5	0	6	10	20	28	14	33
%	4.1	4.1	0	4.9	8.2	16.5	23.1	11.5	27.2

38.7% of respondents prefer the right option compared to a small 8.2% that preferred the option on the left.
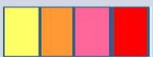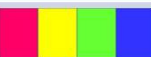
Pair-wise Profiles and Frequency Table B.11 for Q15

Q/Profile 15	1	2	3	4	5	6	7	8	9
Frequencies	18	16	14	11	3	7	21	13	18
%	14.8	13.2	11.5	9.0	2.4	5.7	17.3	10.7	14.8

28% of respondents preferred the option on the left compared to 25.5% that preferred the option on the right.

Pair-wise Profiles and Frequency Table B.12 for Q16

Q/Profile 16	1	2	3	4	5	6	7	8	9
Frequencies	11	7	14	10	14	14	21	7	21
%	9.0	5.7	11.5	8.2	11.5	11.5	17.3	5.7	17.3

23% of respondents preferred the option to the right compared to 14.7% of respondents. Two respondents did not fill in this question.

Pair-wise Profiles and Frequency Table B.13 for Q17
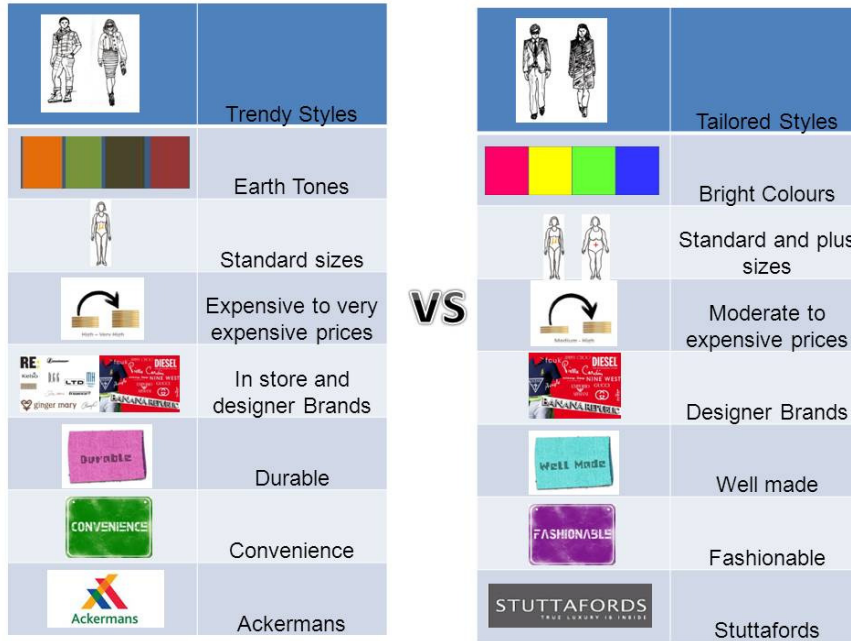
Q/Profile 17	1	2	3	4	5	6	7	8	9
Frequencies	11	6	15	13	12	10	21	12	21
%	9.0	4.9	12.3	10.7	9.9	8.2	17.3	9.9	17.3

27.2% of respondents preferred the option on the right, compared to 13.9% of respondent that preferred the option on the left.
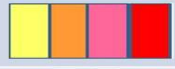
Pair-wise Profiles and Frequency TableB.14 for Q18
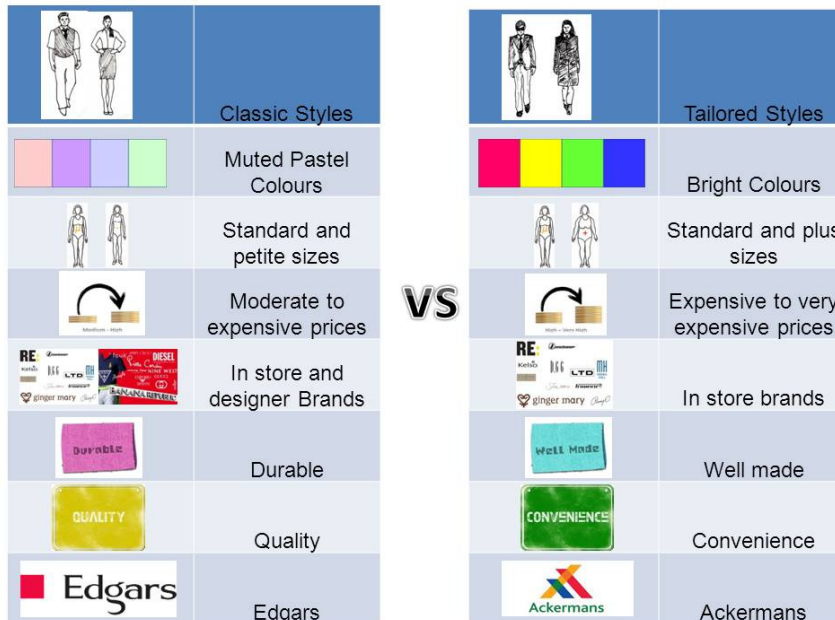
Q/Profile 18	1	2	3	4	5	6	7	8	9
Frequencies	28	15	22	12	14	7	7	6	10
%	23.1	12.3	18.1	9.9	11.5	5.7	5.7	4.9	8.2

35.4% of respondents preferred the option on the left, compared to 13.1% of respondents that preferred the option on the right.
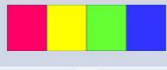
Pair-wise Profiles and Frequency Table B.15 for Q19

Variety of Styles		Trendy Styles
Earth Tones		Seasonal Colours
Standard sizes		Standard and petite sizes
Low to Moderate prices	VS	Expensive to very expensive prices
Designer Brands		In store brands
Durable		Easy Care
Fashionable		Discount
Woolworths		Stuttafords

Q/Profile 19	1	2	3	4	5	6	7	8	9
Frequencies	31	19	22	18	5	5	6	6	9
%	25.6	15.7	18.1	14.8	4.1	4.1	4.9	4.9	7.4

41.3% of respondents preferred the option on the left, as opposed to 12.3% of respondents that preferred the option on the right.
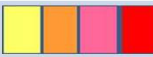
Pair-wise Profiles and Frequency Table B.16 for Q20

Classic Styles		Variety of Styles
Bright Colours		Muted Pastel Colours
Standard sizes		Standard and plus sizes
Expensive to very expensive prices	VS	Low to Moderate prices
In store and designer Brands		In store brands
Easy Care		Durable
Discount		Value oriented
Pep		Woolworths

Q/Profile 20	1	2	3	4	5	6	7	8	9
Frequencies	5	2	6	6	7	11	24	22	37
%	4.1	1.6	4.9	4.9	5.7	9.0	19.8	18.1	30.5

48.6% of respondents preferred the option on the right, compared to 5.7% of respondents that preferred the option on the left.
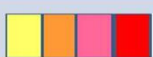
Pair-wise Profiles and Frequency Table B.17 for Q21

Q/Profile 21	1	2	3	4	5	6	7	8	9
Frequencies	18	13	20	17	10	9	16	8	9
%	14.8	10.7	16.5	14.0	8.2	7.4	13.2	6.6	7.4

25.5% of respondents preferred the option on the left, compared to 14% of respondents that preferred the option on the right. There was one respondent that did not fill in this question.

Pair-wise Profiles and Frequency Table B.18 for Q22

Q/Profile 22	1	2	3	4	5	6	7	8	9
Frequencies	8	4	9	10	9	15	24	12	30
%	6.6	3.3	7.4	8.2	7.4	12.3	19.8	9.9	24.7

34.6% of respondents preferred the option on the right, compared to 9.9% of respondents that preferred the option on the left.
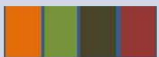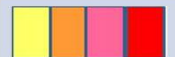
Pair-wise Profiles and Frequency Table B.19 for Q23

	Left Option		Right Option
	Trendy Styles	VS	Casual Styles
	Neutral Colours		Muted Pastel Colours
	Standard, Plus and petite sizes		Standard and petite sizes
	Moderate to expensive prices		Expensive to very expensive prices
	In store brands		Designer Brands
	Easy Care		Well made
	Fashionable		Discount
	Stuttafords		Edgars

Q/Profile 23	1	2	3	4	5	6	7	8	9
Frequencies	25	13	18	13	7	12	10	9	14
%	20.6	10.7	14.8	10.7	5.7	9.9	8.26	7.4	11.5

31.3% of respondents preferred the option on the left, compared to 18.9% of respondent that preferred the option on the right.
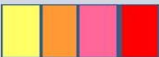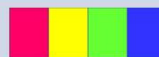
Pair-wise Profiles and Frequency Table B.20 for Q24

	Left Option		Right Option
	Classic Styles	VS	Trendy Styles
	Earth Tones		Seasonal Colours
	Standard and plus sizes		Standard, Plus and petite sizes
	Expensive to very expensive prices		Moderate to expensive prices
	In store brands		In store and designer Brands
	Well made		Easy Care
	Quality		Fashionable
	Pep		Woolworths

Q/Profile 24	1	2	3	4	5	6	7	8	9
Frequencies	8	2	10	7	6	12	21	22	33
%	6.6	1.6	8.2	5.7	4.9	9.9	17.3	18.1	27.2

45.3% of respondents preferred the option on the right, compared to 8.2% of respondents that preferred the option on the left.

Pair-wise Profiles and Frequency Table B.21 for Q25

Q/Profile 25	1	2	3	4	5	6	7	8	9
Frequencies	16	13	19	9	8	11	18	16	11
%	13.2	10.7	15.7	7.4	6.6	9.0	14.8	13.2	9.0

23.9% of respondents preferred the option on the left, compared to 22.2% that preferred the option on the right.

Pair-wise Profiles and Frequency Table B.22 for Q29

Q/Profile 29	1	2	3	4	5	6	7	8	9
Frequencies	12	12	10	8	10	14	12	14	29
%	9.9	9.9	8.2	6.6	8.2	11.5	9.9	11.5	23.9

5.4% of respondents preferred the option on the right, compared to 19.8% of respondents that preferred the option on the right.

Profile 30 was omitted from the data analysis as it was a duplication of number 29.

Pair-wise Profiles and Frequency Table B.23 for Q31
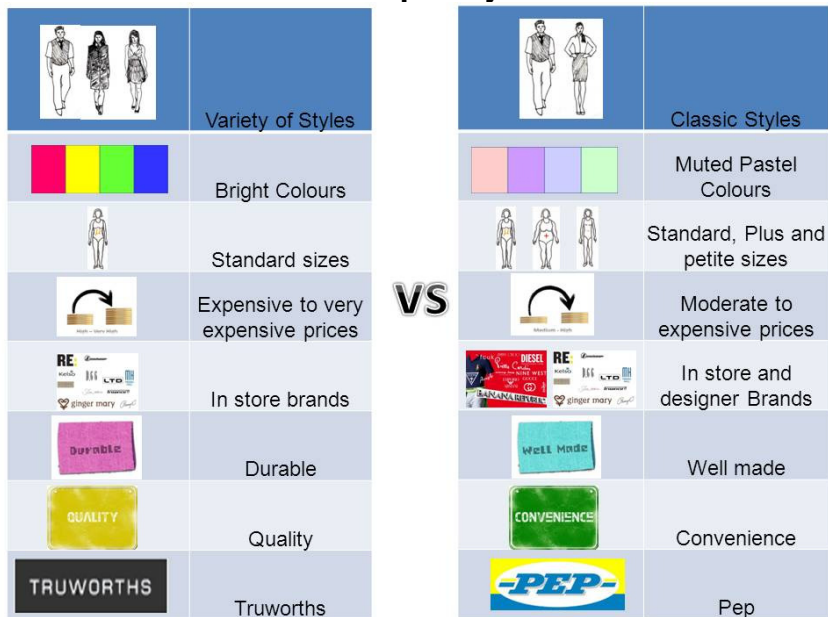
Q/Profile 31	1	2	3	4	5	6	7	8	9
Frequencies	26	16	20	15	7	11	10	10	6
%	21.4	13.2	16.5	12.3	5.7	9.0	8.26	8.26	4.9

34.6% of respondents preferred the option on left, compared to 13.1% that preferred option on the right.
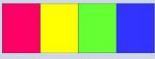
Pair-wise Profiles and Frequency Table B.24 for Q33
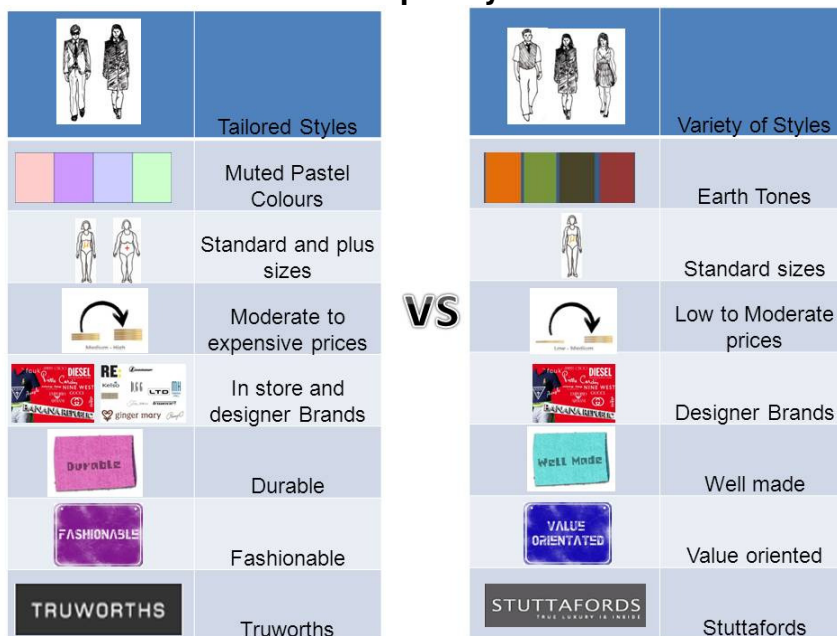
Q/Profile 33	1	2	3	4	5	6	7	8	9
Frequencies	18	17	12	11	12	12	10	11	18
%	14.8	14.0	9.9	9.0	9.9	9.9	8.2	9.0	14.8

28.8% of respondents preferred the option on the left, compared to 23.8% that preferred the option on the right.
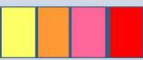
Pair-wise Profiles and Frequency Table B.25 for Q34

Q/Profile 34	1	2	3	4	5	6	7	8	9
Frequencies	11	6	8	12	9	14	18	18	25
%	9.0	4.9	6.6	9.9	7.4	11.5	14.8	14.8	20.6

35.4% of respondent preferred option on the left, compared to 13.9% that preferred option on the right.
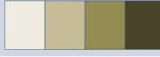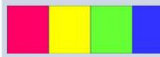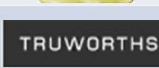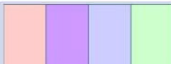
Pair-wise Profiles and Frequency Table B.26 for Q36

Q/Profile 36	1	2	3	4	5	6	7	8	9
Frequencies	14	9	12	9	10	20	11	15	20
%	11.5	7.4	9.9	7.4	8.2	16.5	9.0	12.3	16.5

28.8% of respondents preferred the option on the left, compared to 18.9% that preferred option on the left.
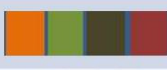
Pair-wise Profiles and Frequency Table B.27 for Q37

Casual Styles				VS	Tailored Styles
Neutral Colours					Bright Colours
Standard and petite sizes					Standard, Plus and petite sizes
Expensive to very expensive prices					Low to Moderate prices
In store brands					Designer Brands
Well made					Easy Care
Fashionable					Quality
Ackermans					Truworths

Q/Profile 37	1	2	3	4	5	6	7	8	9
Frequencies	9	5	6	14	14	19	8	20	26
%	7.4	4.1	4.9	11.5	11.5	15.7	6.6	16.5	21.4

37.9% of respondents preferred option on the right, compared to 11.5% that preferred option on the left.
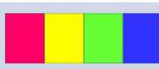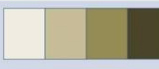
Pair-wise Profiles and Frequency Table B.28 for Q38

Classic Styles				VS	Tailored Styles
Earth Tones					Neutral Colours
Standard, Plus and petite sizes					Standard and petite sizes
Moderate to expensive prices					Low to Moderate prices
In store brands					In store and designer Brands
Easy Care					Durable
Fashionable					Exclusive
Edgars					Woolworths

Q/Profile 38	1	2	3	4	5	6	7	8	9
Frequencies	18	10	10	9	12	11	11	13	27
%	14.8	8.2	8.2	7.4	9.9	9.0	9.0	10.7	22.3

33% of respondents preferred option on the right, compared to 23% that preferred option on the left.
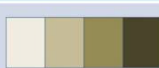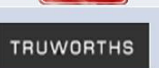
Pair-wise Profiles and Frequency Table B.29 for Q39

Left (Classic Styles)	Right (Trendy Styles)
Classic Styles	Trendy Styles
Bright Colours	Neutral Colours
Standard and petite sizes	Standard, Plus and petite sizes
Moderate to expensive prices	Expensive to very expensive prices
In store brands	In store and designer Brands
Durable	Well made
Convenience	Value oriented
Pep	Truworths

Q/Profile 39	1	2	3	4	5	6	7	8	9
Frequencies	9	4	12	9	12	18	20	10	27
%	7.4	3.3	9.9	7.4	9.9	14.8	16.5	8.2	22.3

30.5% of respondents preferred option on the right, compared to 10.7% that preferred option on the left.
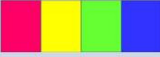
Pair-wise Profiles and Frequency Table B.30 for Q40

Left (Trendy Styles)	Right (Classic Styles)
Trendy Styles	Classic Styles
Earth Tones	Neutral Colours
Standard and petite sizes	Standard sizes
Low to Moderate prices	Moderate to expensive prices
Designer Brands	In store brands
Easy Care	Durable
Exclusive	Discount
Pep	Truworths

Q/Profile 40	1	2	3	4	5	6	7	8	9
Frequencies	3	4	9	11	10	20	14	21	29
%	2.4	3.3	7.4	9.0	8.2	16.5	11.5	17.3	23.9

41.2% of respondents preferred option on the right, compared to 5.7% that preferred option on the left.
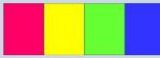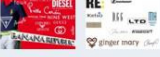
Pair-wise Profiles and Frequency Table B.31 for Q41

Q/Profile 41	1	2	3	4	5	6	7	8	9
Frequencies	31	18	15	13	11	10	5	7	11
%	25.6	14.8	12.3	10.74	9.0	8.2	4.1	5.7	9.0

40.4% of respondents preferred option on the left, compared to 14.7% that preferred option on the right.
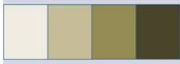
Pair-wise Profiles and Frequency Table B.32 for Q42

Q/Profile 42	1	2	3	4	5	6	7	8	9
Frequencies	29	12	15	14	8	11	15	6	11
%	23.9	9.9	12.3	11.5	6.6	9.0	12.3	4.9	9.0

33.8% of respondents preferred option on the left, compared to 13.9% that preferred option on the right.
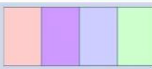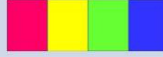
Pair-wise Profiles and Frequency Table B.33 for Q43

Tailored Styles				Trendy Styles				
Neutral Colours				Muted Pastel Colours				
Standard and plus sizes				Standard, Plus and petite sizes				
Moderate to expensive prices				Expensive to very expensive prices				
Designer Brands				In store brands				
Easy Care				Durable				
Quality				Fashionable				
Ackermans				Pep				

Q/Profile 43	1	2	3	4	5	6	7	8	9
Frequencies	27	16	28	20	12	5	6	4	3
%	22.3	13.2	23.1	16.5	9.9	4.1	4.9	3.3	2.4

35.5% of respondents preferred option on the left, compared to 5.7% that preferred option on the right.
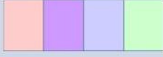
Pair-wise Profiles and Frequency Table B.34 for Q44

Tailored Styles				Classic Styles				
Muted Pastel Colours				Seasonal Colours				
Standard, Plus and petite sizes				Standard and petite sizes				
Expensive to very expensive prices				Low to Moderate prices				
Designer Brands				In store brands				
Easy Care				Durable				
Discount				Convenience				
Edgars				Truworths				

Q/Profile 44	1	2	3	4	5	6	7	8	9
Frequencies	12	10	16	10	11	11	18	9	24
%	9.9	8.2	13.2	8.2	9.0	9.0	14.8	7.4	19.8

27.2% of respondents preferred option on the right, compared to 18.1% that preferred option on the left.

Pair-wise Profiles and Frequency Table B.35 for Q45

Q/Profile 45	1	2	3	4	5	6	7	8	9
Frequencies	5	3	9	10	19	15	19	12	29
%	4.1	2.4	7.4	8.2	15.7	12.3	15.7	9.9	23.9

33.8% of respondents preferred option on the right, compared to 6.5% that preferred option on the left.