Private and national brand consumers' images of fashion stores

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Abstract

Purpose – The present study aims to investigate the role of brand store image in the context of private and national fashion brands. The study examines two issues: do private brand consumers differ from national brand consumers in their perception of the attributes they value in their store image? And, do fashion consumers in general differ in their perception of the attributes they value in a store image?

Design/methodology/approach – Data were collected through a field survey comprising 395 respondents: 195 private brand consumers and 200 national brand consumers.

Findings – Findings indicate that the two groups of consumers do not differ in their perception of store image. Cluster analysis reveals two groups of consumers: "Brand Store Image Enthusiasts" who are high in their perception of their brand store image attributes, and "Brand Store Image Indifferent" consumers who are low in their perception of their brand store image attributes. The first group was also found to have greater brand loyalty.

Practical implications – Different marketing strategies are offered to each fashion sector. In addition, distributors in the fashion industry should build a strategy for Brand Store Image Enthusiasts who are high in their perception of all three brand store attributes. It is essential to point out the psychological meaning of the brand when appealing them.

Originality/value – The study contributes to the consumer behavior literature by tying the well-established construct of brand store image to the fashion sector in the context of private and national labels.

Keywords Fashion, Segmentation, National brand, Private brand, Store image

Paper type Research paper

An executive summary for managers and executive readers can be found at the end of this article.

Introduction

Private labels, which refer to a brand owned by a retailer (a marketing chain) or by a wholesale distributor (that owns the right to sell the brand exclusively in its own retail outlets (Herstein and Gamliel, 2004), have been flourishing in the fashion sector. Many international chains such as H&M, Top Shop, The Gap, Marks & Spencer, Next, Principles, Macy's, Burberry, Laura Ashley, Ralph Lauren and Benetton now sell their private fashion labels in their own stores. Private fashion labels have also penetrated low-end fashion chain stores (Gomez-Arias and Bello-Acebron, 2008). In the UK, the ratio of brand penetration in the food sector is assessed at around 30 per cent, whereas in the fashion sector, private label penetration has reached 53 per cent (Moore, 1995). This figure demonstrates the extent of the private label penetration phenomenon in the fashion sector.

Despite the massive penetration of private labels into the fashion market, few researchers have investigated this field (Liljander *et al.*, 2009). The existing studies focus primarily on the British and North American fashion markets (Moore, 1995). These studies provide limited tangible marketing strategies to help fashion chain stores (retailers selling clothing and apparel items) marketing private labels ensure faster penetration of private fashion brands, and moreover, to assist fashion chain stores marketing national brands (retailers selling several brands of clothing and apparel items under their chain brand name) cope with this booming phenomenon.

One major way to market brands today, and specifically fashion brands, is through the brand store image, which refers to the way consumers perceive and evaluate the items that they can buy from specific retailers. The store image, which reflects the way consumers perceive the store's internal and external atmosphere, has been an important concept in retail research since the 1950 s (Herstein and Vilnai-Yavetz, 2007; Ou *et al.*, 2006). Davies and Brooks (1989) and Cornelius *et al.* (2010) considered successful image positioning as the retailer's main strategic challenge. The literature is replete with definitions and empirical findings regarding the importance of store image (Hartman and Spiro, 2005; Kunkel and Berry, 1968; Lindquist, 1974-1975; Martineau,

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1958; Oppewal and Timmermans, 1997), including in the fashion sector (Erdem *et al.*, 1999).

To date, only one study has tied store image to private and national brands in the context of the fashion industry (d'Astous and Saint-Louis, 2005). This study compared upper class and lower class stores. In the light of this gap in the marketing literature, the present study investigates the importance of fashion store image attributes from the perspective of private and national fashion store consumers in general. The study posits two research questions: Do private label consumers perceive brand store image attributes differently than national label consumers? Do consumers differ in their perceptions of store brand image attributes? The results of this research may provide private brand fashion store managers with the most suitable tools to increase store sales and minimize the gaps between their stores and national brand fashion stores similarly to what has happened in the consumer packaged goods industry. The findings of the present study may also offer national brand fashion store managers tools that will give them an edge in the growing competition with private brand chains.

The paper is structured as follows. First, a short review surveys the literature about private and national labels and store image. Next, the study method and findings are described. Finally, a discussion of the findings and managerial implications are provided.

Literature review

The literature review first surveys what has been written about private and national brands in order to learn about the power of private brands vs national brands in recent years. Second, there is a discussion of private labels in the fashion sector, the most dominant sector of private labels. Third, store image and its evolution over the years are reviewed. Finally, a discussion of the fashion store image is provided in order to reveal the most dominant attributes of store image in terms of fashion sector.

Private and national brands

The availability and market share of private brands in the consumer packaged goods industry worldwide have surged in the past decade (Ailawadi *et al.*, 2008; Labeaga *et al.*, 2007). In the West, market shares for store brands have increased across all product categories (Juhl *et al.*, 2006). Private brands now account for one in every five items sold daily in US supermarkets, drugstore chains, and mass merchandisers; market share in Western Europe is even larger (Kumar and Steenkamp, 2007). Over the past 50 years, the efforts of marketing and brand managers in North America and Europe, and the heavy monetary investments made in private brands proved successful financially in every respect (Herstein *et al.*, 2010). In a relatively short period of time, private labels of nearly every item that consumers buy at the retail level or through food service and institutional facilities (Fitzell, 1998; Sprott and Shimp, 2004; Tiferet and Herstein, 2010) have become obtainable, though the process has not been a completely smooth one.

A review of the marketing literature reveals that some researchers focus on the modern marketing era (Moore, 1995; Baltas and Argouslidis, 2007) while others begin their study in the middle of the nineteenth century (Hoch and Banerji, 1993; Low and Fullerton, 1994; De Chernatony and McDonald, 2002). Although private brands achieved success as commodities at the beginning of the twentieth century, most marketing and branding researchers view the modern marketing era (1970 s) as the most meaningful in terms of the phenomenon's evolution and growth. Just after the mid-1970 s, retailers – mainly large supermarkets – differentiated themselves from their competitors by using private brands alongside other strategies such as retail services, parking availability, assortment, size of store and internal décor. Retailers had to ensure that their own labels offered better quality than other brands in order to be more appealing to new customers (Herstein and Gamliel, 2006a). By the 1990 s, private brands had gained significant market share to become a real threat to manufacturers' brands. According to Hoch (1996) and Kwon *et al.* (2008), most national brand manufacturers regard private labels as they would any other national brand – tough competition that they must take seriously. Data prove that mass merchants have gained substantial market share at the expense of the traditional supermarket format, and that private labels are growing faster than national brands (Beristain and Zorrilla, 2011; Dhar and Hoch, 1997; Gilboa *et al.*, 2012; Tarzijan, 2004). It also appeared that the differences between national brands and international and local private labels also diminished in the Far East, in countries such as Taiwan (Cheng *et al.*, 2007). Practically, the market share of private labels is highest in the fashion industry in comparison to other industries (Liljander *et al.*, 2009), but nevertheless, only a single empirical research paper dealing with the subject can be found in the literature (d'Astous and Saint-Louis, 2005). Table I presents summary of the main studies about private brands done during the last two decades.

Private labels in the fashion sector

The transition from marketing private label packaged goods to private label fashion goods was far from a smooth process. Salmon and Cmar (1987) identified five factors that hindered the penetration of private labels into the fashion sector:

1. *Changing consumer shopping habits*. In the past, consumers tended to purchase fashion items in shops with a broad array of products and models, such as department stores. These stores were characterized by general image rather than fashion store image. Today's consumers focus more on a specific fashion line. Fashion chain stores (national brands stores), accordingly, have been able to streamline their range of fashion goods to respond far more accurately to the styles that consumers seek and make it economically viable to produce a private label of their own.
2. *Information technology*. Ordering fashion products from a fashion wholesaler has always carried immense risk for the fashion retailer due to uncertainty whether consumers will want the ordered products (style-wise, color-wise, etc.). With the growth in technological ability to gather and manage information about consumer preferences, it has become easier to learn which fashion styles are attractive and sought after by consumers. This information enables retailers to produce a private label designed almost certainly to meet the latest fashion trends, and therefore, sell.
3. *Changing relationships between retailers and manufacturers*. The dependence of the various fashion brand manufacturers on retailers has increased as a result of

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Table I Major empirical studies on private label brands, 1990-2012

Author(s)/Year	Product category	Where data were collected
Richardson *et al.*, 1994	Grocery	Northeast USA
Dick *et al.*, 1995	Grocery	The USA
Dick *et al.*, 1996	Grocery	Northeast USA
Richardson *et al.*, 1996	Grocery	Northeast USA
Baltas, 1997	Grocery	The UK
Baltas *et al.*, 1997	Grocery	The UK
Richardson, 1997	Grocery	The USA
Burton *et al.*, 1998	Grocery	The USA
Sethuraman and Cole, 1999	Grocery	Midwest USA
Sinha and Batra, 1999	Grocery	Northeast USA
Batra and Sinha, 2000	Grocery	Northeast USA
Ailawadi *et al.*, 2001	Grocery	The USA
Garretson *et al.*, 2002	Grocery	Midwest USA
Miquel *et al.*, 2002	Grocery	Spain
Apelbaum *et al.*, 2003	Grocery	The USA
Baltas, 2003	Grocery	The UK
Sheinin and Wagner, 2003	Grocery	The USA
d'Astous and Saint-Louis, 2005	Garment	Canada
De Wuif *et al.*, 2005	Grocery	Belgium
Vahie and Paswan, 2006	General	The USA
Herstein and Gamliel, 2006b	Service – HMO	Israel
Cheng *et al.*, 2007	Grocery	Taiwan
Huang *et al.*, 2007	Grocery	The USA
Mandhachitara *et al.*, 2007	Grocery	Thailand and The USA
Gamliel and Herstein, 2007	General	Israel
Hsu and Lai, 2008	Grocery	China
Lee and Hyman, 2008	Grocery	Korea
Liu and Wang, 2008	Grocery	Taiwan
Wyatt *et al.*, 2008	Grocery	Southwest USA
Huang and Huddleston, 2009	Grocery	The USA
Geyskens *et al.*, 2010	General	The Netherlands
Tiferet and Herstein, 2010	General	Israel
Bao *et al.*, 2011	General	The USA
Gilboa *et al.*, 2012	Agricultural	Israel
Tiferet and Herstein, 2012	Grocery	Israel
Herstein *et al.*, 2012	General	Portugal, Greece, Turkey, Israel

Source: Based partly on Hyman (2010)

the latter's growing power. More and more designers are now willing to produce private labels for fashion chain stores, which in turn has upgraded the status of their brands in the fashion sector.

4 *Shifting consumer merchandise tastes*. Starting in the late 1970 s, consumer fashion tastes started to change. Consumers began demanding fashion styles, reflecting the quality and style of private fashion brands found in specialty and designer fashion houses.
5 *Incorrect implementation of the private label strategy by retailers*. In many chain stores, the process of private label penetration was slow, sometimes because the private labels lacked uniqueness. Specialty chains, in particular the fashion chain stores that could offer private labels that more directly targeted customer needs and desires, were the most successful private label entrepreneurs.

In general, fashion chain stores succeeded in penetrating private labels into a sector defined by national brands by adhering to a strategy of providing better discounts to manufacturers for volume production, demanding higher product quality standards and investing heavily in attractive and appealing stores (d'Astous and Saint-Louis, 2005).

Store image

One of the first general definitions of the concept of a store image was given by Martineau (1958, p. 47): "The way in which the store is defined in the shopper's mind, partly by its functional qualities and partly by an aura of psychological attributes". A few years later, Arons (1961) defined image in terms of a store's personality, which he viewed as arising from meanings and relationships perceived by the consumer. For Amirani and Gates (1993), a store image is measured in terms of a bundle of tangible and intangible attributes. As these examples suggest, a range of different but overlapping definitions have been offered over the years. Many researchers, however, have adopted Kunkel and Berry's

(1968) definition of store image as "the total conceptualised or expected reinforcement that a person associates with shopping at a particular store" (see, for example, Lindquist, 1974-1975; Hirschman *et al.*, 1978; Zimmer and Golden, 1988).

Most researchers characterise the components of a store image, with the objective of imparting a more operative meaning to the concept. As noted previously, Martineau (1958) addressed two aspects of a store image: its functional features, which include merchandise quality and selection, store layout, price range, and other objective or technical qualities; and features with psychological or emotional effects such as ambience and style, behaviour and demeanor of the sales staff, type and quality of advertising, quality of service, and reputation.

Other characterisations of a store image following Martineau's definition are somewhat similar, yet are also more complex and vary in the nature and number of components. Berry (1969), writing about department stores, identified twelve factors that contribute to a store image: location; sales personnel; fashionability, price, quality, and assortment of merchandise; convenience; service; sales promotions; advertising; store atmosphere; and reputation on adjustments. Lindquist (1974-1975) listed nine attributes, which he further divided into sub-attributes; his nine categories are merchandise, service, clientele, physical facilities, convenience, sales promotions, store atmosphere, institutional factors, and post-transaction satisfaction. Oppewal and Timmermans (1997) identified six dimensions of store image (e.g. price, location, store interior, and service). Peterson and Kerin (1983), followed by Wu *et al.* (2004), measured retail image by ten dimensions (e.g. price, helpful employees, and cleanliness); Amirani and Gates (1993) and Teas (1994) distinguished twelve attributes (e.g. store personnel, physical facilities, retail service, and merchandise); Hartman and Spiro (2005) reviewed the attributes traditionally associated with measurement of store image, and refined them into five categories: merchandise, atmosphere, appearance, convenience, and salesmanship.

As can be seen from the previous, a number of components – sales staff, price, merchandise, customer service, design and layout of the store – are cited by many researchers. Osman (1993) claimed that a store image depends on the customer's evaluation of the individual store's attributes.

Fashion store image

Greenberg *et al.* (1983), studying the fashion sector, identified product choice, promotions and atmosphere as key variables in building a store image for retail outlets. Thompson and Chen (1998) found the most important qualities in fashion retailing to be price, sales promotions, location, and assortment and style of merchandise, as well as more psychological or abstract components such as atmosphere, reputation, quality and service. Another study of apparel shopping yielded three general attributes: status, merchandise, and price, with status being the most important attribute – a finding that suggests psychological attributes play an important part in defining a store's image (Erdem *et al.*, 1999).

A number of researchers studying the fashion sector (e.g. Birtwistle *et al.*, 1999; Birtwistle and Shearer, 2001; Moye and Kincade, 2003) found that different retailers put significantly different emphases on different attributes (such as fashion, layout, price, quality, and staff). For example, according to Davies (1992), the attributes considered ideal for retailers of women's clothing (e.g. good value, well-displayed merchandise, helpful and well-trained staff) differ from those for menswear (e.g. stylish, attractive merchandise and quick service).

The only empirical study of the linkage between private fashion labels and store image was that of d'Astous and Saint-Louis (2005). Their study focused on the effect of private fashion label vs national fashion label on store image in terms of upper class and lower class stores. They concluded that in the context of buying a shirt for a special occasion, consumers valued a private label more than a national brand when the shirt was offered in an upper class store. The opposite effect was noted when the shirt was available in a lower class store.

In sum, the ongoing growth of private labels in the fashion industry indicates the importance in studying this sector. The present study uses the lens of brand store image to test whether this central marketing construct differs for private vs national label consumers; and whether fashion consumers in general can be characterised by their perceptions of brand store image attributes. In contrast to d'Astous and Saint-Louis' study (2005), the current study examines whether private fashion label consumers vs fashion label consumers perceive store image dimensions differently.

Methodology

Data collection

In order to compare consumers' perceptions of both types of fashion chain stores, two private chain stores were carefully selected along with a department store, selling several fashion brands in different classes. The two private fashion chain stores were chosen because they have been sector leaders for over five years. The department store is also a leading one. Each chain store has branches throughout Israel. One store of each of the three chain stores was sampled in three large cities in Israel, resulting in a sample of nine stores: three stores of one private fashion chain store, another three stores of a different private fashion chain store, and three branches of a department store.

Participants

The sample comprised of 395 consumers: 100, 95 and 200, in the respective two private fashion chain stores and in the department store. Among the participants, 268 were women (68.5 per cent) and 124 were men (31.5 per cent). Participants' ages ranged from 15 to 50. Twenty-five per cent of the participants were between the ages of 15 and 20; an additional 25 per cent were 21-25; 27 per cent were 26-30; the remainders were over 30. About 80 per cent had a monthly income equal to or less than the average monthly income (corresponding to the sample relative age mean). The majority of participants (58 per cent) have higher education. The demographic characteristics of the sample typify Israeli fashion consumers – most of them are young women (under the age of 30).

Measures

1 *Brand store image*: 15 items regarding various store image attributes were used: price, quality, advertising, personal and social aspects, atmosphere, sales personnel,

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promotions, brand name, fashion design and product assortment (Kunkel and Berry, 1968; Lindquist, 1974-1975; Moore, 1995). Respondents were asked to indicate their degree of agreement on a five-point Likert scale (in which 1 = "strongly disagree" 5 = "strongly agree").

Since the questionnaire items in the present study were not derived directly from a previous study, following Henry *et al.* (2005), an exploratory factor analysis (EFA) was employed to create a higher-order index based on different information sources. The store brand image items were entered into the EFA analysis, resulting in five factors (rotation method: varimax; eigenvalue > 1.0, variance extracted by the factor = 58.3 (see Table II)). As Table II demonstrates, the last five items either did not load on any factor or yielded low reliability results. Therefore, these items were omitted from the analysis, leaving three factors: Brand Importance, Store Atmosphere and Brand Identification. A confirmatory factor analysis (CFA) was used to validate the three factors. The CFA fit measures were satisfactory and indicated a good fit (chi square = 50.88, $p < 0.01$, df = 24; NFI = 0.95; RFI = 0.91; IFI = 0.97; TLI = 0.95; CFI = 0.97; RMSEA = .053). Following this, indices of the three attributes were created by calculating the items per each attribute, weighted by their factor score weights.

2 *Customer brand loyalty*: Two items, adapted from Knox and Walker (2001), examined customer loyalty to the fashion chain store. One item, using a yes/no scale, measured respondents' ability to distinguish between the brand's products and similar products. The second item asked respondents to indicate how much of their fashion shopping budget is dedicated to the brand. The item scale comprised five categories: 10 per cent, 25 per cent; 50 per cent, 75 per cent and 100 per cent.
3 *Socio-demographics*: Respondents were asked to indicate their gender, age, income and education.

Procedure

Participants were approached in the stores while waiting to be served by the cashier, waiting for an available dressing room, or while wandering through the store. Most consumers who were approached agreed to participate in the study. The study was presented as a fashion industry survey, and participants were informed that the questionnaires were anonymous and asked to answer as frankly as they could. The surveyors read each question out loud and marked participants' answers on a sheet. When referring to the brand in each question, the name of the brand that corresponds to the store was explicitly named – whether one of the two private fashion brands name or the national brand name.

Table II Exploratory factor analysis of the store brand image items

Brand store image	Loading
Factor I – Brand importance	
The brands in this store are more expensive, but worth it	0.739
The brands in this store are different from those of competitors	0.726
I place high importance on the brand logo appearing on my clothing	0.705
The brand name appearing on the clothing influences my decision to buy it	0.645
Eigenvalue	3.576
Percent of variance	23.84
Cronbach's alpha reliability	0.72
Factor II – Atmospheric	
The look of the external environment	0.861
The look of the internal environment	0.835
The quality of the salespeople influences my decision whether to buy this brand	0.518
The variety of the products in the store influences my decision whether to buy the brand	0.336
Eigenvalue	1.89
Percent of variance	12.6
Cronbach's alpha reliability	0.69*
Factor III – Brand identification	
This brand allows me to feel comfortable with myself	
This brand allows me to feel comfortable with friends	
Eigenvalue	1.331
Percent of variance	8.87
Cronbach's alpha reliability	0.85
Factor IV – Pricing and advertising	
The price of the brand influences my decision whether to buy the brand	0.793
Sales campaigns influence my decision whether to buy the brand	0.717
The advertising campaign influences my decision whether to buy the brand	0.387
Eigenvalue	1.218
Percent of variance	8.12
Cronbach's alpha reliability	0.451
Factor V – Quality and clothing design	
The clothing design influences my decision whether to buy the brand	0.863
The quality of the brand influences my decision whether to buy the brand	0.299
Eigenvalue	1.052
Percent of variance	7.014
Cronbach's alpha reliability	0.26

Results

Relationship between brand store image and type of brand

In order to test our first research question – do private label and national label consumers differ in their perception of brand image attributes – an analysis of variance was used. The analysis used type of store to predict the perception of the three brand stores' image attributes. The results indicate there are no differences between the three types of stores (brand importance: $F = 0.60, p > 0.10$; store atmospheric: $F = 0.30, p > 0.10$; brand identification: $F = 0.15, p > 0.10$).

As two of the stores belong to the private fashion sector, their samples were combined in order to test whether there is a difference between private and national fashion labels' consumers in general. A *t*-test analysis, which examined whether there are differences between the private label and the national label samples, also did not reveal any differences between the private and national labels regarding their brand

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store image attributes (brand importance: $t = -1.05, p > 0.10$; store atmospheric: $t = -0.30, p > 0.10$; brand identification: $t = 0.53, p > 0.10$).

Segmentation of consumers based on their store brand image

In order to test our second research question – do consumers differ in their perception of brand store image attributes – a cluster analysis was employed. In light of previous results, the analysis was performed on the full sample, rather than on the sub-samples. A multi-step cluster analysis was used, with the three brand store attributes serving as the analysis bases. In the first stage, hierarchical cluster analysis was used to set the final number of clusters. The hierarchical cluster analysis indicated a 2-cluster solution. Following this, a K-means cluster analysis was performed. The first cluster comprised 217 participants (55 per cent of the sample), who are high in all three brand store attributes, and were thereafter named "Brand Store Image Enthusiasts". The second cluster comprised 178 participants (45 per cent of the sample), who are low in all three brand store attributes, therefore named "Brand Store Indifferent" (see Table III for details). One salient finding shown in Table II relates to the brand identification attribute. For this attribute, which deals with the psychological importance of the brand to the consumer self, the two groups displayed the highest differences between each other. In other words, for the Enthusiasts, the psychological meaning of the brand is highly important compared to the Indifferent group.

Chi square analyses tested whether the two consumer groups differ in their brand loyalty and in their demographics. The results show significant differences for the two items of brand loyalty and gender. A higher percentage of the Brand Store Image Enthusiasts compared to the Brand Store Image Indifferent stated that they can identify brand products. A large group of the Brand Store Image Enthusiasts (76.5 per cent) also admitted that they spend more than 25 per cent of their fashion shopping budget on brand clothes compared to the Brand Store Image Indifferent group (64 per cent). Regarding gender, while female consumers divided evenly between the two groups, two-thirds of the male consumers belong to the Brand Store Image Enthusiasts (see Table III for details).

Discussion

An examination of the perceptions of consumers of private label fashion chain stores and national brand chain stores elicited very similar findings regarding all store image attributes. No statistically significant differences were found regarding these measures. Although there are no substantially empirical findings about the role of brand store images in the private label sector, the literature suggests that private label brands are perceived differently from national brands in several dimensions – quality, price, and social and personal aspects. Consumers generally perceive the quality of private label brands as lower than the quality of national brands (Bellizzi *et al.*, 1981; Richardson *et al.*, 1994; Ghose and Lowengart, 2001). Private brand consumers are typically more price sensitive than national brand consumers (Hoch and Banerji, 1993; Starzynski, 1993; Raju *et al.*, 1995). The present research statistically proved that the national brand chain store was not substantially different than the private ones. These findings may imply that private brand chain stores accumulate more recognition among consumers in comparison with the national ones. This recognition may be a result of a mix of variables such as fashion design, sales promotion, etc.

Cluster analysis results suggest that consumers fall into one of two categories: Brand Store Image Enthusiasts, who are high in all three attributes of brand importance, store atmosphere and brand identification; and Brand Store Image Indifferent, who demonstrate low levels in all three constructs. Brand Store Image Enthusiasts were also found to have higher brand loyalty, are able to distinguish their brand's products from those of competitors and are willing to spend more money purchasing their brand's products. One salient finding of the cluster analysis indicates that for this group, the brand identification attribute, which relates to the psychological meaning of the brand to the consumer self, is highly important. Graeff (1996) suggested that consumer's self-concept (self-image) can be defined, maintained, and

Table III Clusters of store brand image consumers

	Brand store image enthusiasts	Brand store image indifferent	Sig.
Size of cluster	55%	45%	
Brand store image constructs			
Brand importance	0.34	0.26	0.000
Store atmosphere	1.00	0.86	0.000
Brand identification	1.57	0.74	0.000
Brand loyalty			
Ability to distinguish brand products:			
Yes	52%	33%	0.000
No	48%	67%	
Percentage of fashion shopping budget spent on the brand:			
10%	23.5%	35.5%	0.017
25%	37%	35%	
50% and more	39%	29.5%	
Gender			
Men	37%	25%	0.014
Women	63%	75%	

enhanced through the products they purchase and use. Consumers achieve "self-consistency" by holding positive attitudes toward, and purchasing brands that are perceived to be similar to their self-concept (Graeff, 1996). The present findings support his claim in regard to the enthusiasts group, at least.

Managerial implications

The findings of this research show that, in fact, there is no difference between private fashion brands and national fashion brands, from the point-of-view of fashion brand consumers. In other words, the gap that existed for many years between national fashion brands and private ones, favouring the national brands, appears to be closing. As a result, fashion brand consumers are likely to see private fashion brands as a perfect alternative to national fashion brands. The findings also reveal that the private fashion chain stores can leverage the current business opportunity to give their brands new meanings and gain market share traditionally held by the national fashion brands.

On the other hand, the findings of this research indicate the threat hovering over national fashion chain stores, which for many years retained their high market position by selling "brands without boundaries" (Moore *et al.*, 2000). In view of this threat, fashion chain stores (both national and private) should adopt a different marketing strategy in order to promote their brands in the fashion market and differentiate themselves from each other. The marketing strategy of national fashion chain stores that once enjoyed a competitive advantage over the private fashion stores, relying on dimensions such as "price" (high), "sales staff", "in-store atmosphere", "product assortment", "personal dimension" and the "brand name", should now stress such dimensions as "fashionable design", "sales promotion" and "quality", in order to position themselves as comparable to the private labels stores. Above all, national fashion chain stores should advertise more, and thus encourage a higher level of awareness of their outlets – which over the past few years have lost their distinctiveness in the fashion item market, following the massive penetration of private fashion chain stores that have garnered attention for themselves. In tandem, the national chain stores should structure advertising messages drawing on the idea of fashion products featuring unique design and premium quality. Other way national fashion stores can use to distinguish themselves from the private fashion stores is by stressing the variety of different fashion labels sold by them, compared to the sole label of private stores.

Private fashion chain stores should continue energetically fighting the national fashion chain stores. Their marketing strategy should be designed not only according to personality components (of their customers) and should not only boost their brands, but should also draw on the dimensions perceived as vital by consumers when choosing a fashion product – design, sales promotion, and quality. At the moment, these three dimensions – and sales promotion above all – are not typical features of the marketing strategy applied by fashion chain stores. For decades private fashion brands have built on the idea of "value for money" – which contradicts the principles of sales promotion, unique fashionable design, and outstanding quality. Accordingly, private fashion chain stores that succeed in structuring a new marketing strategy based on these dimensions will imbue their brands with new meaning, currently unknown in private fashion brands – and may indeed become brands without boundaries in the future.

In addition, distributors in the fashion industry should build a strategy for Brand Store Image Enthusiasts who are high in all three brand store attributes. As this group expresses higher levels of importance to the brand, identifies more with it and is fonder of the store atmosphere, marketing managers should take note of these consumers and initiate specific campaigns that will enhance their loyalty. It is recommended that distributors will highlight the psychological appeal of the brand when targeting these consumers. A very clear private label personality, which is based mainly on psychological meaning, can strengthen the self-image of this target market and also reinforce brand loyalty.

Limitations and future research

The objective of the present study was to see whether fashion private label and national label consumers differ as far as regards brand store image. The results suggest that the two groups of consumers are not very different. While this can be explained by the growing power of private labels in the fashion industry (Herstein and Gamliel, 2004), the result may also relate to the brand store image scale. In the present study we chose to construct our own brand store image scale, gathering items from various well-established scales. While this decision allowed us to cover a wide range of store image aspects, many of these were not included in the final brand store image constructs used in the analysis. Possibly, had other scales been used, different results would have been found.

Another way to test the differences between private and national label fashion consumers is by testing other relevant constructs. Testing differences between these two groups of consumers in brand loyalty (You and Donthu, 2001), brand status (Han *et al.*, 2010) or brand attachment (Whan Park *et al.*, 2010) could clarify the role of private vs national brands in the fashion industry.

The present study was done in Israel, a fairly Westernised nation, but it is worth extending this work into a multi-national study, incorporating non-Western countries as well. For example, as private brands have recently become quite common in Far Eastern countries such as China, Taiwan and Singapore (Cheng *et al.*, 2007), it is worth comparing the perception of these consumers to Western ones.

To summarise, further investigation to compare consumer behaviour regarding store brands vs national brands in the fashion industry is required in order to better understand the influence of these brands on store patronage and vice versa.

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Further Reading

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Executive summary and implications for managers and executives

This summary has been provided to allow managers and executives a rapid appreciation of the content of this article. Those with a particular interest in the topic covered may then read the article in toto *to take advantage of the more comprehensive description of the research undertaken and its results to get the full benefits of the material present.*

The recent past has witnessed explosive worldwide growth in private label brands, especially in the category of consumer packaged goods. Own label brands have penetrated many product categories and report increased market share in the US and Western Europe. Private label alternatives are now available for most items consumers purchase from retailers. Various statistics show that these brands are growing faster than their national brand counterparts.

Perceived quality differences between manufacturer and private brands have narrowed considerably. This has occurred in Far Eastern countries like Taiwan, where penetration of retailer brands is highest in the fashion industry. In countries such as the UK, market share of such brands in the fashion sector is even greater than has occurred in the food category.

This global market expansion of private brands has led to many established international fashion chains stocking their own brands in their stores. Top Shop, Next, Principles, Laura Ashley and Ralph Lauren are but a few. Private label brands have also been introduced in down-market fashion chain stores.

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Establishing private labels in the fashion industry was initially difficult. But technology helped stores to acquire knowledge of consumer preferences and restructure their product range accordingly to improve quality and uniqueness so that client needs could be more effectively met. Manufacturer willingness to produce for retailers was another factor.

Store image has long been acknowledged as being able to influence the shopping experience. The notion was first introduced in the 1950 s and was soon subject to various definitions incorporating such as personality of a store based on a cluster of tangible and intangible factors. Over time, different conceptualisations have emerged as have the number of store image attributes. These comprise functional components with those categorised as either psychological or emotional.

New definitions of store image vary in complexity and the number and type of attributes included. Researchers have pointed out that a store's image is the product of consumer evaluation of its key components, several of which have been cited frequently in different studies. The ones to appear most in store image characterisations are merchandise, price, sales personnel, customer service and store design and layout.

Specific considerations of the fashion sector suggest that product choice, promotions and location positively contribute to image perceptions. The importance of abstract features such as atmosphere, quality and reputation is likewise apparent. However, the significance placed on each component is subject to fluctuate between different retailers, several studies have found. One scholar illustrates this by pointing out the respective attributes that are likely to be prominent in women's clothing and menswear.

Research into the relationship of store image and private label fashion products is minimal. The present work therefore investigates how store image components impact on both private and national fashion store patrons. Herstein et al. conducted the study within branches of two different private label fashion stores and one department store situated in three large Israeli cities. Subjects were asked to provide a response to statements relating to brand store image and customer brand loyalty. Demographic information was also requested. Age of the 395 participants ranged from 15 to 50, with women accounting for 68.5 per cent of the sample and men 31.5 per cent. Additional consideration of income and education details showed that the sample was characteristic of typical fashion consumers in Israel.

Store image attributes were organised into three types: brand importance, store atmospheric and brand identification. Analysis revealed no difference in how private brand label and manufacturer brand label consumers perceive brand image attributes. The same result was forthcoming when the samples for the two different private fashion brands were combined.

Two clusters were then formed to differentiate between participants scoring high in all three brand store attributes and those scoring low. Labelled "Brand Store Image Enthusiasts" and "Brand Store Indifferent", the clusters had 217 and 178 participants respectively. Further tests revealed that:

- each group contained an almost equal representation of female subjects, whereas around two-thirds of male consumers were Enthusiasts;
- the brand's psychological meaning was more important to the Enthusiasts than the Indifferent cluster; and
- enthusiasts were likelier than Indifferent consumers to recognize brand products and spent over 25 percent of their fashion budget on brand clothes, thus indicating higher levels of brand loyalty.

Extant literature suggests that consumers have markedly different perceptions of national brands and private label brands, especially in relation to aspects like price, quality and personal and social factors. However, findings here indicate that the perceived gap between these brands has lessened considerably. Private brands have commonly been marketed on price and value for money. On this evidence, variables like fashion design and quality can also be incorporated into the promotional messages.

There is accordingly a greater likelihood that consumers will now regard private label fashion brands as a viable alternative to their manufacturer brand alternatives. Herstein et al. believe that being less distinctive from each other means that national fashion brands and private fashion brands should adjust their marketing strategies in order to differentiate. They advise national fashion brands to place greater emphasis on dimensions which include "fashionable design", "quality" and "sales promotion" as a way of achieving parity with private label stores. Increased advertising is also recommended as a way of reasserting some of the "distinctiveness" such brands once held. The emphasis should be on the unique design and quality of their fashion products and the range of fashion labels on offer.

For their part, private fashion stores would be best served by focusing on design, quality and sales promotion to market their products, given the importance of these aspects. According to the authors, their brands will acquire "new meaning" if this strategy is adopted.

Some consideration of Brand Store Image Enthusiasts is also recommended. Marketers should target these consumers by stressing the psychological appeal of the brand and thus help to reinforce consumer self-image and increase their loyalty to the brand.

Further research using different brand store image constructs is encouraged by Herstein et al., who additionally suggest using such as brand attachment, brand loyalty and brand status to compare national and private label fashion consumers. Another idea is to extend this work to incorporate different nations and cultures.

(A précis of the article "Private and national brand consumers' images of fashion stores". Supplied by Marketing Consultants for Emerald.)