

## **The Country-of-Origin-Effect on a Domestic Fashion Market**

Joke Schrauwen  
University of Antwerp  
joke.schrauwen@ua.ac.be

Anouk Mennes  
University of Antwerp  
anouk.mennes@student.ua.ac.be

### **Abstract**

One way of defining a brand can be the focus on its country of origin. This paper starts with the assumption that on a domestic market, fashion labels can endorse their brand by the explicit use of a geographical annotation as e.g. a country or city of origin (COO) as caption in their logo, and thus obtain a USP in regard to other, global, brands. We unravel how this country/ city of origin endorsement can work for the Belgian fashion market.

For this project, we studied five cases studies of Belgian brands in the middle market segment. We interviewed brand managers and shop keepers, directed questionnaires at potential consumers in multi brand stores and analyzed websites and documents in order to get a view on the deployment of the country/ city of origin in various communication channels as well as its underlying motivations and to get an indication of the consistency of the COO- and brand image with consumers. Research results show that a country/city of origin (c.q. Belgian/Antwerp/Brussels) annotation can be used (1) to give an identity and authenticity to the label by referring to its place of origin; (2) to connect the label to assumed positive product features of Belgian/ Antwerp fashion (creativity and quality); (3) to appeal to a latent feeling of 'pride' of consumers at the domestic market. Nonetheless, this 'nationalist-effect' doesn't play a role in effective consumer behavior. Brand origin is for most consumers no argument to buy a piece of apparel.

Based on our market survey and literature study, we explain where the positive connotations for the annotation 'Belgian' and 'Antwerp' come from. This study stresses the importance of a whole ecosystem of Belgian / Antwerp fashion where famous independent designers and academies as well as shopping streets and domestic media play their role.

**Key Words:** Country-of-origin-effect, Belgian Fashion, fashion marketing

One way of defining a brand can be the focus on the country-of-origin. The brand's origin as well as the origin of production can influence the opinion of consumers positively or negatively. We study how this country- or city-of-origin endorsement can work on a domestic fashion market; hereby we restrict ourselves to brand origin in the Belgian middle market segment.

### **The Country-of-origin-effect: an introduction**

In reference books on (fashion) marketing the possibility of country-of-origin (COO)-marketing is often mentioned, or tips are given on how to deploy this (e.g. Jackson & Shaw 2009). A COO can be used in branding to construct the brands identity and so to radiate authenticity. Authenticity refers to having a quality of proven authority or genuineness; or honesty on origin. Authenticity is a notion that is considered crucial in e.g. Generation Y marketing. Using an explicit COO can be seen on a similar level as mentioning the year of establishment or notions as 'the original'. A COO can enhance the storytelling of a brand (Van Den Bergh & Behrer 2011).

Academic research on the effects of the COO, as well brand origin as country of production, mainly study how consumers perceive certain product attributes through the country image in certain cases of consumer goods, e.g. food, electronics, cars, or fashion (a.o. Insch & McBride 2002, Kang & Yang 2010, Kim & Chung 1997, Jayson 2006, Parkvithee & Miranda 2011). Often researchers look into how the COO-effect differs depending on personal beliefs (e.g. ethnocentrism and the COO-influence, Chryssodoidis et al 2007), group beliefs (e.g. the influence of social class on the COO-effect Miranda & Parkvithee 2013) or the macro-economic conditions of a country (a.o. Bilkey & Nes (1982) state that people from developed countries evaluate domestic products more positively); or how the COO might influence consumers behavior effectively (e.g. Koschate-Fischer et al studied the COO-effects on willingness to pay.)

For this explorative research paper we firstly narrow the country-of-origin to an explicit place of origin (country or city) of brands in the domestic middle market in fashion. We limit ourselves to brand origin; origin of production is not included. Our first goal is to describe the perceived COO-effect with brand managers, store managers and potential consumers in this domestic market. Secondly we want to unravel how a positive (or negative) image for a country or city is established. The data were collected in the context of Anouk Mennes' master thesis, commissioned by Flanders Fashion Institute. They wanted a deeper insight in how the image of (Belgian) independent designers radiates on the Belgian fashion business as a whole. Nonetheless, during the project we've always ensured that this underlying motive didn't reflect in questionnaires and interview protocols.

### **Research design**

We studied the topic by investigating five case studies of Belgian brands in the middle market segment. We've chosen this specific segment in order to obtain a relative homogeneous group. The delineation of this population was based on a descriptive study of Schrauwen and Schramme (2013). This paper takes a deeper look into the dominant logic (with the interpretation of the value chain of each segment and the main issues in general, financial and marketing manager of the chain director) of the four main segments of the (Flemish) fashion markets: independent designers, luxury fashion of concerns, the middle market segment and the retail chains. The main criteria of segmentation were the position of the creativity in the design and the price level of basic daywear. The middle market segment is characterized by brands that target a well-defined group of the higher middle class. A clear identity in combination with 'what the market wants' (forecasts based on previous sales data and trends) form the blueprint of the collections. Some labels in this segment discern themselves by more creative or sophisticated designs, others are more conservative. Due to (relatively) higher production volumes and lower technical level of finishing and workmanship (in comparison to the highest market segments), consumer prices for daywear have 2 or 3

figures in euro (Schrauwen & Schramme 2013a). This middle market segment together with the retail chains, take the bulk of turnover added value and number of employees of the Flemish based fashion companies (Schrauwen & Schramme 2013b).

We selected five cases in this population. These five Belgian companies have seven brands in total: Andres (brands Xandres and Hampton Bays), Essentiel, Le Fabuleux Marcel (brands Le Fabuleux Marcel de Bruxelles and Année Erotique), Kipling and Scapa. We've chosen these specific cases in order to have a broad variety of COO-strategies, target groups, communication strategies, stages in the life cycle, international dispersion etc., rather than having a complete representative sample of Belgian brands in the middle market segment. For this research project, we interviewed (marketing or product) managers and studied websites and communication documents to get a view on the deployment of the COO in various communication channels as well as the brands' underlying motivations. We used structured in-depth interviews, in order to avoid the risk of 'guiding questions'. Afterwards, the interviews were transcribed and coded so we could detect motivations, attitudes and opinions on the explicit use of a country- or city-of-origin on a domestic market (based on Mortelmans 2007 and Baarda et al 2005).

In a second phase we studied the consistency of these motivations and opinions with (potential) B2B-clients and (potential) B2C-consumers. We organized a round with structured interviews at 11 owners and branch managers of multi-brand stores in this market segment. The shops were (all but one) located in the province of Antwerp and sold, next to international brands, several Belgian middle market brands. Most shops had some of the cases' brands in their portfolio, but none had all the cases in their portfolio. A mix between metropolitan and small town shops, between shops with a broad and a small supply, between independent, branches and department stores was acquired. The interviewed managers were asked for their associations with and perception of 'Belgian fashion', their purchase behavior (channels, type of supply variety, share of Belgian fashion in their portfolio) and their perception of the COO-effect of Belgian fashion with their clients (based on Mortelmans, 2007 and Baarda et al 2005).

We also employed questionnaires directed at potential clients of multi-brand stores in the middle market segment. 116 persons were willing to fill out a paper questionnaire while they were shopping in one of five selected multi-brand stores. Although response was rather high, there are some demographic biases: most respondents were female (only 3 respondents were male), living in the province of Antwerp (75%) or in the age group 20-30 years (41,4%). Consumers were asked for their associations with and perception of the concept 'Belgian Fashion', their knowledge of and associations with several (Belgian) middle market brands and reflections on their purchase behavior. We must note that our market survey is restricted to cognitive and affective aspects of brand perception, while effective purchase behaviour wasn't included. The results of the survey were analyzed by SPSS (based on De Pelsmacker & Van Kenhove 2002).

Throughout the research process, we studied literature on country-of-origin effects, (fashion) marketing and (the history of) Belgian fashion. Finally, based on our surveys and literature, we explain where the positive/negative connotations for the annotations 'Belgian', 'Antwerp' and 'Brussels' come from.

By this variety on research methods, we receive a more profound and well-triangulated insight in how fashion labels can endorse their brand by the explicit use of the country- or city-of-origin in their communication, and if/how they can obtain a USP in regard to other, global, brands on their domestic market by doing so. Additionally we hope to gain a more in-depth knowledge of the construct 'Belgian fashion'.

## Results

### The deployment of a country-of-origin reference in fashion communication

Firstly, we'll compare how the seven brands of our cases play their country- or city of origin in their communication. One brand has an extended name with a geographical reference: Le Fabuleux Marcel de Bruxelles, abbreviated Le Fabuleux Marcel. In the Belgian middle market segment, there are two other (relatively young) brands that use this technique: ANTWRP and So Antwerp.

Three brands (Xandres, Le Fabuleux Marcel de Bruxelles and Essentiel) use an explicit geographical label as caption with their brand logo. Other Belgian brands that use a similar caption in there logo are Talking French, Mayerline, B-Shirt, OMSK, Nathalie Vleeschouwer. Remarkably, two companies of our cases, Andres (behind brand Xandres) and Le Fabuleux Marcel de Bruxelles, have a second brand for which they don't use an explicit geographical label, Hampton Bays and Année Erotique respectively. Hampton Bays mentions their COO on its websites and in press communication. Année Erotique doesn't deploy its COO at all.

Kipling stresses their origin only in their corporate story mentioned on their website, in press info and in specific communication campaigns, e.g. their 25<sup>th</sup> anniversary. For this campaign, a new product and merchandising line was set up with visual references to Antwerp (the cathedral, statues, diamonds, fries,). A similar location reference on products we see at Le Fabuleux Marcel de Bruxelles, that for some product lines plays with the name Brussels, the national flag, or (at the time of the abdication) the name of king Albert.

Scapa only mentions their origin in press communication. Moreover, until a decade ago, the brand was called 'Scapa of Scotland'. Though it has always been a Belgian-based brand its main place of production and raw materials used to be Scotland and one of its founders is Scottish.

Brand name	Mentioned place of origin	Brand Name	Caption in Logo	COO reference on products	Explicit COO in press story	Explicit COO in corporate story website /Facebook
Essentiel	Antwerp		X		X	X
Kipling	Belgium /Antwerp			X	X	X
Le Fabuleux Marcel de Bruxelles	Brussels	X	X	X	X	X
Année Erotique	(Belgium)					
Scapa	(Belgium)				X	

Xandres	Belgium		X		X	X
Hampton Bays	(Belgium)				X	X

Table 1: the deployment of country-of-origin in the studied cases (based on interviews and website and document analyses)

In conclusion, all brands, but one deploy their country-of-origin in their press communication, though some entangle their name and logo to their place of origin too. Nonetheless, in B2B-communication (towards multi-brand stores or manufacturers) the country-of-origin isn't stressed. Respondents at Essentiel and Fabuleux Marcel mention that it's the look & feel of the collection that persuades (B2B-) buyers, not the country-of-origin. Nonetheless, most buyers know the country-of-origin of a brand, as Scapa remarks: it goes without saying, most B2B-clients already know. Kipling mentions that in B2B-communication their COO is of no importance. Though, Andres points out that they mention their origin more explicitly in B2B-communication, also because it stands for certain business standards.

### Motivations for explicit COO-communication

Our main observations are that we can discern 3 types of motivations of the middle market segment labels to use the annotation 'Belgium', 'Antwerp' or Brussels<sup>1</sup>. The first two were consistent with the literature.

The first motivation of explicating the COO is just to give an identity and authenticity to the label by referring to its corporate story and roots. For all brands it just seemed obvious to mention the COO to a certain extent, because the brand has its roots in a city or a country, many employees live there (Essentiel, Kipling), and for two companies, a (small) part of the production is still located in Belgium (Scapa, Andres). Two respondents mention that telling the story of the brand, gives something likeable, cordial or cool to the brand (Essentiel, Fabuleux Marcel).

The second set of motivations, mentioned with three respondents (Essentiel, Fabuleux Marcel, Andres) referred to assumed positive product features of Belgian/ Antwerp fashion, mainly creativity or originality and quality or product know-how. Essentiel illustrates that they want to connect themselves to the vibrant and creative fashion scene of Antwerp. Andres refers to the know-how built up in the Belgian textile industry that bloomed until the 1970'ies.

A last set of reasons (mentioned at Andres, Le Fabuleux Marcel) is to appeal to a latent feeling of 'pride of Belgian fashion' with consumers at the domestic market. For those two brands, Belgium is their largest market. They assume that the COO-reference might cause a slight love for the country and thus the brand, though Fabuleux Marcel stresses that they don't intend to be nationalistic. Even Scapa, that doesn't explicit markets its origin, recognizes that Belgians are indeed proud of their fashion scene.

Although all the labels can give certain reasons why they explicitly mention their COO, several respondents put the effectiveness of the COO-effect with consumers into perspective. Essentiel, Scapa and Kipling mention that being Belgian isn't necessarily a sales point, other arguments are considered more decisive. It is rather the total picture and consistency between, e.g. positive product attributes of Belgian fashion, the brand image and

<sup>1</sup> Other geographical labels aren't used nor in our cases, nor at other middle market segment labels.

the specific clothes. Andres is the only company that assumes that some Belgian consumers might consciously opt for Belgian brands.

This last argumentation was also seen in the interviews with shop keepers. Five of 11 respondents don't think the COO of the brand influences consumer behavior. Others think that price and fit (potentially cut to 'Belgian' physique or 'Belgian' taste), quality, image and brand awareness are more important. But, so indicates one respondent, Belgian brands get a lot of media-attention and might thus generate a greater confidence or familiarity. Though some consumers ask for the COO, most shop keepers (6 out of 11) say they don't mention the COO deliberately.

### **Consistency with consumers perception**

When we checked these reasons with the perceptions of (potential) consumers, we found four main results. First of all, we noticed a larger knowledge of the brand origin at consumers when brands use a geographical caption in their logo or when the brand recently set up a clear campaign on its country-of-origin. For only 6 of the 14 Belgian brands (in a list of 20 local and international brands of the middle market segment), the country-of-origin was recognized by the majority of respondents. For brands as Essentiel (79%), Kipling (74%), Nathalie Vleeschouwer (72%) and Xandres (68%) more than 2/3 of the respondents had the origin right. For brands that deliberately use a reference to a foreign place in their name (American Outfitters, Hampton Bays, Scapa) or logo (River Woods pictures the USA Stars & Stripes in their logo) more than 40% of our respondents see them as foreign (resp. 68%, 46%, 43% and 62%). Noteworthy is that River Woods and American Outfitters hardly ever mention their real country-of-origin in communication, what might explain why they are perceived as foreign with 2/3<sup>rd</sup> of the consumer-respondents.

Nonetheless some exceptions must be noticed. The brand Le Fabuleux Marcel wasn't known with half of the respondents (48%), so only 38% had their COO right. The brands Talking French and Mayerline use a geographical caption with their logo (Antwerp and Brussels respectively) but resp. 39% and 49% of the respondents didn't recognize them as Belgian. For these three brands we might argue that they weren't well known with our specific group of respondents: Fabuleux Marcel markets themselves as a rather underground, alternative brand; Mayerline targets elderly women and Talking French concentrates its efforts on its own retail network. With these marginalia in mind, we might conclude that the first type of motive of a fashion label to deploy its COO, to give an identity to its brand, seems to work when explicitly used in its communication strategy.

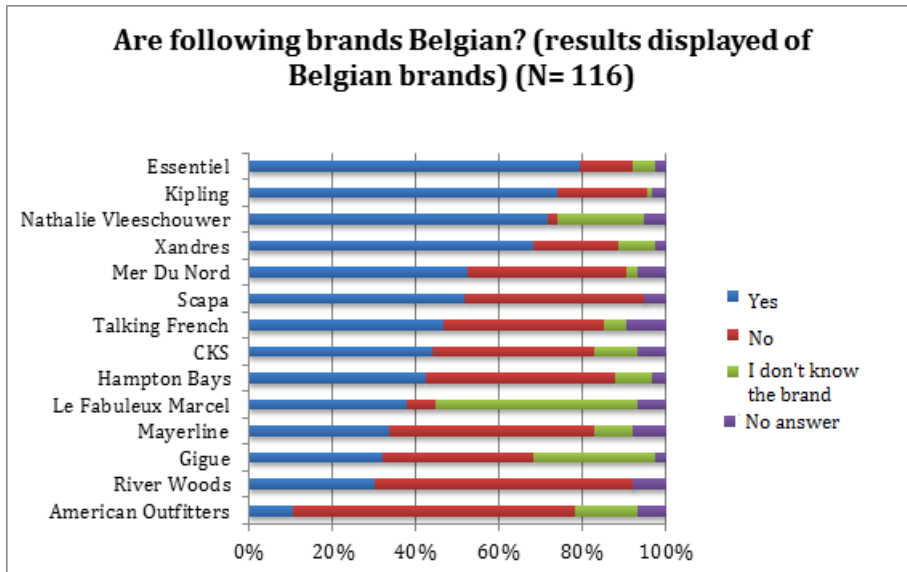


Figure 1: Degree of identification of Belgian Brands (results consumer survey)

Secondly, concerning the attributed positive product features (creativity and quality) of Belgian or Antwerp (or Brussels)<sup>2</sup> fashion in general and of the studied brands in particular, we found a large consistency between the perception of brands, shops and consumers.

Characteristic	#	%
Quality	94	82%
Expensive	73	63%
Wearable	68	59%
Creative	66	57%
Modern	41	36%

Table 2: Top 5 indicated characteristics for Belgian fashion (guided responses) (results consumer survey)

Characteristic	#	%
I don't know the brand	70	64%
Young	24	22%
Expensive	23	21%
Wearable	23	21%
Modern / Creative	17	16%

Characteristic	#	%
Expensive	78	68%
Wearable	71	62%
Creative	57	50%
Modern	50	43%
Young	49	43%

Characteristic	#	%
Quality	67	59%
Wearable	60	53%
Expensive	55	48%
Classic	53	46%
Classy	43	38%

<sup>2</sup> Other cities or regions were only mentioned to a far lesser extent.

Top 5 indicated characteristics Hampton Bays (N=111)		
Characteristic	#	%
Wearable	63	57%
Expensive	54	49%
Young	47	42%
Quality	44	40%
Modern	34	31%

Top 5 indicated characteristics Scapa (N=115)		
Characteristic	#	%
Expensive	85	74%
Quality	74	64%
Classic	71	62%
Wearable	64	56%
Classy	33	29%

Top 5 indicated characteristics Kipling (N=112)		
Characteristic	#	%
Quality	61	54%
Young	57	51%
Wearable	54	48%
Ordinary	50	45%
Expensive	34	30%

Table 3-8: Top 5 indicated characteristics with brands of the studied cases (guided responses) (results consumer survey)

All six brands get the characteristics ‘wearable’ and ‘expensive’, as indicated in the features of Belgian fashion. Four out of six brands have the attribute ‘quality’ in the top-5 answers of our respondents. Most important, most brand characteristics (except expensive) are in line with how the brands perceive themselves. If they picture themselves as modern and creative, it’s seen in the top-5 answers. So consistent marketing (whether or not related to explicit COO-marketing) reflects in the perceived brand image.

Remarkably, the consumers also added the characteristic ‘expensive’ to Belgian fashion and the middle segment brands. This characteristic was also mentioned at the interview with Scapa and in the interviews with some shop keepers, other brands didn’t think Belgian fashion had negative connotations. However, with the theory of aspirational reference groups in mind, this doesn’t need to be an undesirable product feature. In marketing literature, aspirational groups are a sub-category of a reference group, consisting of individuals (not necessarily known personally) with whom a person desires to be associated, an effect that is stronger in product categories regarding public luxuries. (Bearden & Etzel 1982) Being associated with people who can afford expensive domestic fashion, might be an incentive to buy, certainly since Belgian fashion is often associated with independent designers (cf. infra).

An important observation is that nor the consumers, nor the brands, mentioned a perfect fit to the ‘Belgian physique’ or the fit with a ‘Belgian taste’ in the attributed product characteristics of ‘Belgian fashion’. It was only mentioned in one shop keeper interview.

(3) Furthermore, our respondents are (as mentioned at Andres and Fabuleux Marcel) indeed proud of Belgian Fashion. 74% of our respondents agreed with the statement “I’m proud of our Belgian fashion”. When we rephrased the question to ‘Our Belgian fashion is a showcase for our country’<sup>3</sup>, a similar but slightly less enthusiastic image appeared.

<sup>3</sup> Translation for ‘Onze Belgische mode is een visitekaartje voor ons land’.



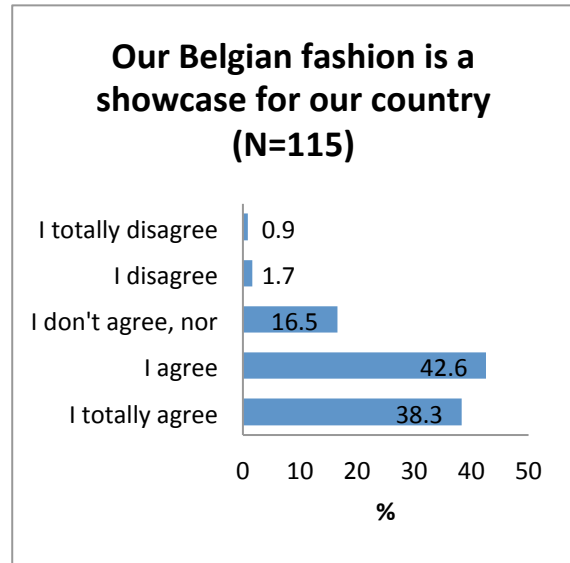


Figure 2 & 3: Degree of pride of Belgian fashion with consumers (Results consumer survey)

A fourth and last observation from our consumer survey is that, when reflecting on their purchase behavior, the brand origin is for our respondents no argument to buy a piece of apparel, although they have a positive attitude towards Belgian fashion. This observation is in line with the results of the interviews with several brands and shop keepers.

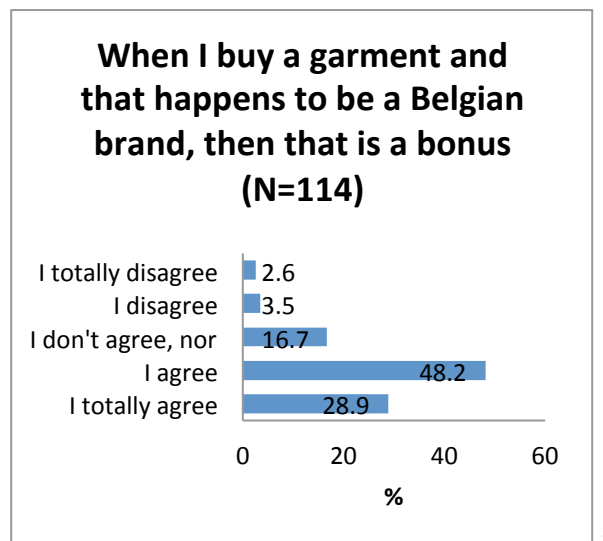


Figure 4 & 5: Degree of how consumers perceive the influence of the domestic COO on their consumer behavior (Results consumer survey)

The irrelevance of the Country-of-origin in purchase behavior became most clear, when asked what factors influence the purchase (given that the garment pleases and fits the consumer):

<sup>4</sup> Translation for: 'Als ik een kledingstuk koop en dat is toevallig een Belgisch merk, is dat mooi meegenomen'.

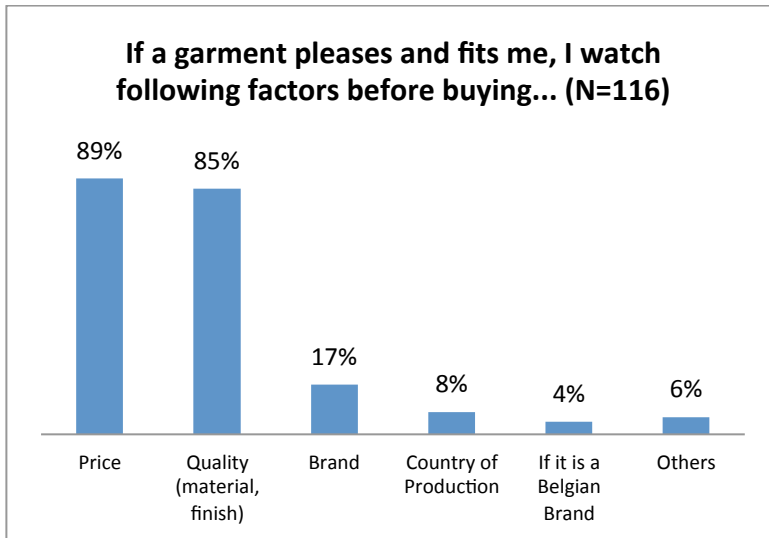
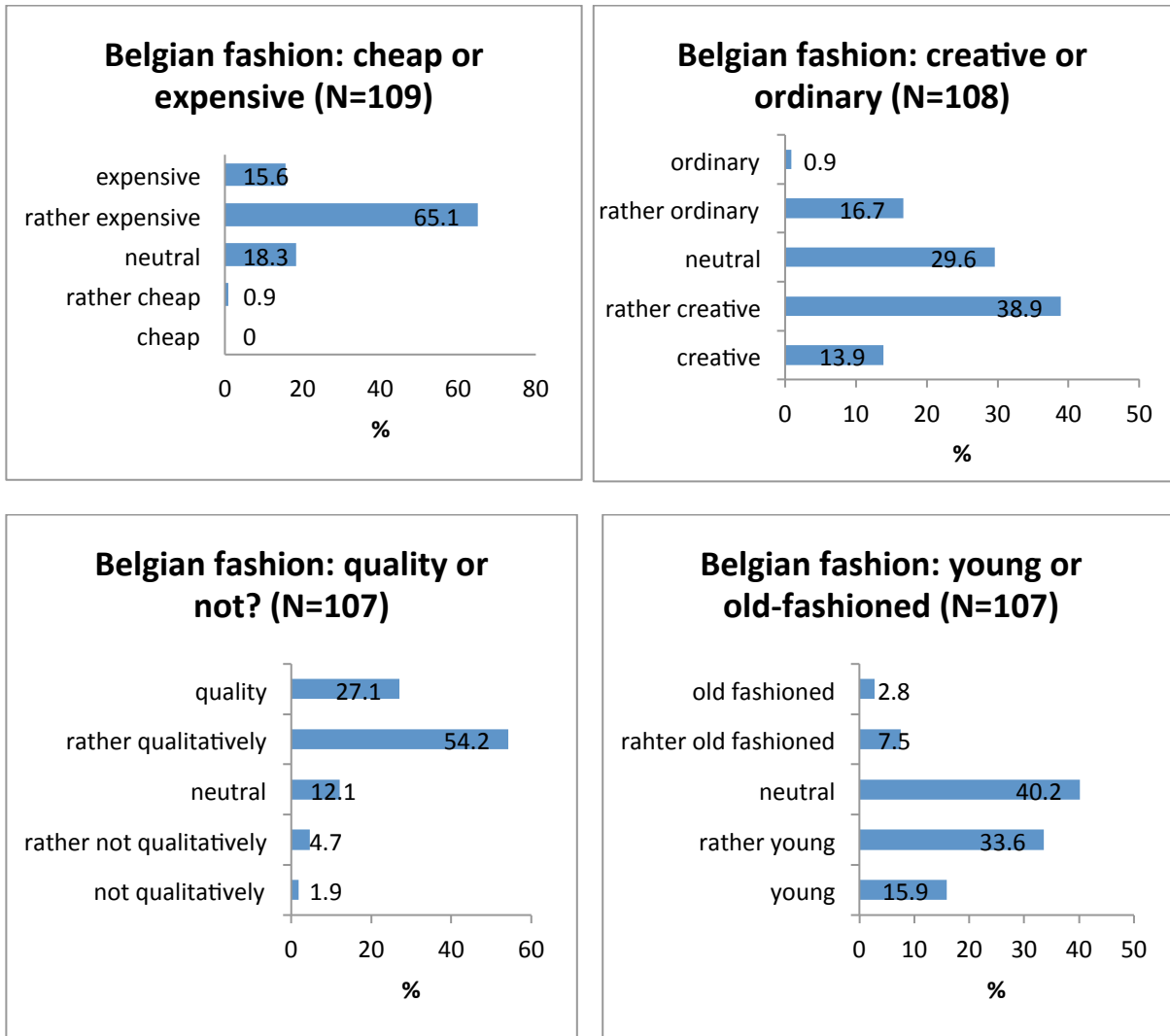


Figure 6: Elements that influence consumer decision process (results consumer survey)

For 17% of the consumer respondents the brand is a relevant reason for purchase, for 89% of the respondents the price is and for 85% of the respondents the product quality is. This last argument is interesting since several authors (o.a. Jackson) claim that an untrained eye can only estimate product quality of apparel to a rudimental extent. Since the notion Belgian fashion is associated with quality (cf Table 2, 82% of our respondents associate 'quality' with Belgian Fashion), we might conclude that in the Belgian middle market segment Belgian fashion labels can endorse their brand by explicit use of a geographical annotation, a country / city of origin, in order to build the identity of their brand and to connect their products to assumed positive product features of Belgian/ Antwerp fashion, as quality.

### Unraveling the notion Belgian Fashion

If we resume table 2, we can say that most of our consumer respondents link (in guided associations) the product characteristics quality (82%), expensive (63%), wearable (59%) and creative (36%) to Belgian fashion. But also in free associations, similar features were noted: quality (31 of 114 respondents mentioned this), (rather) expensive (22 of 114 respondents), wearable (8 of 114 respondents), modern (6 of 114 respondents), colorful (5 of 114 respondents) and sustainable (5 of 114 respondents). Rephrasing the question by means of semantic differentials, gave a similar result:



Figures 7-10: Degree of perceived characteristics of Belgian fashion when asked for semantic differentials (Results consumer survey)

Comparable views (except 'expensive') were noted in the brand interviews. Answers of the brands varied between 'serious, slightly conservative or well-behaved, down-to-earth, a bit severe, a junction between (severe) northern and a (romantic) southern style, bringing quality. Shopkeepers associated quality, stylish, sober, practical, good fit and wearable, classic (but all so trendy) to Belgian fashion. Nonetheless, most brands and shopkeepers stressed a great diversity in style, when asked for style characteristics of Belgian Fashion. Finally, several shopkeepers stressed the practical partnership when doing business with Belgian brands and the expensive price tag.

The survey and literature provide us insights on where these positive connotations of Belgian/ Antwerp or Brussels fashion come from. Through spontaneous associations, all our respondents (brand managers, store managers and consumers), we noticed the importance of the complete ecosystem of 'Belgian/ Antwerp/ Brussels fashion'. When we asked the brands for example for image associations on the notion 'Belgian Fashion, all respondents referred to (established) designers (common answers were 'The Antwerp Six', Dries Van Noten, Ann Demeulemeester, Raf Simons or Martin Margiela), and the fashion schools (Fashion Departments of the Royal Academy of Fine Arts Antwerp and La Cambre –Mode(s)

in Brussels). One label, with long established roots, mentioned also the (defunct) Belgian textile manufacturing industry.

Multi-brand stores mentioned many brands, the Fashion Department of the Royal Academy of Fine Arts Antwerp, the link between the royal family and Natan. Only three shopkeepers referred to the independent designers (arty, willful and conceptual). Shop keepers were also asked which places they associate with fashion. Obviously Antwerp was mentioned (and with it, the Academy, Antwerp Six, Fashion Museum MoMu, the presence of flagshipstores, stock sales and extravagant people). Also for Brussels similar answers were given (flagships, extravagant people) but also fashion fairs, European and international stores and Avenue Louise were dropped. One shop keeper mentioned Ghent and its Academy. Another indicated Hasselt as shopping city.

In our consumer survey, we've questioned the topic in several ways. When asked for spontaneous associations (3 answers were possible, 114 respondents filled out at least one, in total 313 associations were given), 131 answers referred to product characteristics (cf. supra), 70 to fashion companies, 52 answers were related to Antwerp, 35 to characteristics of the fashion industry and 17 referred to types of clothes.

Top 10 associations Belgian Fashion (N=114)		
Answer	# mentioned	Category
Quality	31	Characteristics clothes
Antwerp Six	21	Antwerp references
Expensive	17	Characteristics clothes
Dries Van Noten	16	Companies
Antwerp	13	Antwerp references
Walter Van Beirendonck	12	Companies
Fashion designers	11	Characteristics industry
Natan	8	Companies
Wearable	8	Characteristics clothes
Fashion Department of Royal Academy of Fine Arts Antwerp	6	Antwerp references

Table 9: Top 10 associations with the notion 'Belgian fashion' (results consumer survey)

Remarkably, when referring to fashion companies, a retail chain and a luxury brand were only mentioned once. All others were established independent designers and ditto middle market segment brands. A similar result was seen when we asked for the first 3 Belgian brands that come to mind. 145 times a middle market segment brand was mentioned, 143 times an independent designer, 2 times a luxury brands and 2 times a retail chain. 20 answers were brands that aren't Belgian. Striking is that, Essentiel (established in 1999) is the youngest company in this list. All other brands have a much longer history, most even dating from the 1980'ies. Of course we must bear in mind that the respondents are not a representative sample of the Belgian population, but (potential) clients of selected multi-brand stores in the middle market segment.

Top 10 mentioned Belgian Brands (N=109)		
Answer	# mentioned	Category
Dries Van Noten	42	Independent designer
Essentiel	37	Middle market
Natan	20	Independent designer
Ann Demeulemeester	19	Independent designer
Walter Van Beirendonck	15	Independent designer
Xandres	13	Middle market
Dirk Bikkembergs	10	Independent designer
Mer Du Nord	9	Middle market
Kipling	8	Middle market
Gigue	8	Middle market

Table 10: Top 10 mentioned Belgian brands when asked for three free associations (results consumer survey)

So, over all three respondent categories, famous independent designers (the well-established names, not young designers) were particularly often mentioned, as well as some other (older) brands in middle market segment, the fashion academies, and the shopping streets with retail chains or more upscale shopping streets. This conclusion demonstrates the importance of the (well-established) independent designers in this ecosystem of Belgian Fashion.

Now, how was this overall image of 'Belgian fashion' established? More historic contributions on 'Belgian fashion' stress the importance of the federal Textile Plan, a recovery campaign for the Belgian textile industry that started in 1981. Next to economic measures, a large media campaign with a.o. magazines '*Mode, dit is Belgisch*' were set up. This promotion campaign ran from the '80s until the mid '90s and its slogan and magazine formula were later continued by the lifestyle magazine 'Weekend Knack'. Simultaneously, from the '80s onwards the Belgian media have covered extensively the successes of the independent designers and the academies, starting with rise of the Antwerp Six. This domestic media attention had its influence on the definition of 'Belgian' and 'Antwerp Fashion'. (Gimeno Martinez 2008) The shift of a traditional production industry (the textile industry until the 1980'ies) towards a sector with creative image is well expressed by Luc Derycke's opening statement in his monograph rejoicing Belgian Fashion Design:

*"It appears that no such thing as 'Belgian Fashion' was ever spoken, let alone written about, before the nineteen-eighties. However, all Belgian people wore clothes, and it's safe to assume that many of these were fashionable. (...) 'Belgian' simply never featured as an adjective to the word fashion."*(Derycke in Derycke et al 1999)

Although this ecosystem of positive references was built up very slowly (from the beginning of the 1980'ies until the end of the 1990'ies), and is operative for more than a decade, it stays fragile. When, for example dissociative reference groups as Belgian retail chains gain importance in the ecosystem, or when the role of the aspirational groups (independent designers) decreases, the country image will alter. Another potential threat in the valuation of the label 'Belgium / Antwerp' lies in the fact that the mentioned brand names in this ecosystem are relatively old household names. When these companies disappear by

retirement of the designer or managerial difficulties, the ecosystem risks to falter and the COO-effect for Belgian fashion might change.

### Conclusion

Research results show that a country-or city-of-origin (c.q. Belgian/Antwerp/Brussels) annotation can be used (1) to give an identity and authenticity to the label by referring to its place of origin; (2) to connect the label to assumed positive product features of Belgian/Antwerp fashion (creativity and quality); (3) to appeal to a latent feeling of 'pride' of consumers at the domestic market. Nonetheless, this 'nationalist-effect' doesn't play a role in effective purchase behaviour. Brand origin is for most consumers no argument to buy a piece of apparel. Nonetheless communication on the COO can contribute to a deeper knowledge or awareness of the desired brand image. We might conclude that in the Belgian middle market segment Belgian fashion labels can endorse their brand by explicit use of a geographical annotation, a country or city of origin, in order to build the identity of their brand and to connect their products to assumed positive product features of Belgian/Antwerp fashion, as quality, if consistency between assumed features of Belgian fashion, the product and the brand communication is obtained.

Based on our market survey and literature study, we explain where the positive connotations for the annotation 'Belgian' and 'Antwerp' come from. This part of the study stresses the importance of a whole ecosystem of Belgian fashion where famous independent designers and academies as well as shopping streets and domestic media play their role.

### References

- Baarda, D.B., de Goede, T., & Peters, V. (2005). *Basisboek kwalitatief onderzoek*. Groningen: Wolters-Noordhoff.
- Bearden W.O., Etzel M.J., (1982) Reference Group Influence on Product and Brand Purchase In: *Journal of Consumer Research*, Vol. 9, No. 2. Pp. 183-194.
- Bilkey, J. W., & Nes, E. (1982). Country-of-origin effects on product evaluations. *Journal of International Business Studies*, Spring/Summer, p. 89-95.
- Bohdanowicz, J. Clamp, L. (1994). *Fashion Marketing*. London: Routledge.
- Braaksma R.M. (2009), Kopstaartbedrijven. Panteia/ EIM Zoetermeer.
- Chrysochoidis G., Krystallis A., Perreas P. (2007), Ethnocentric beliefs and country-of-origin (COO) effect. Impact of country, product and product attributes on Greek consumers' evaluation of food products. In: *European Journal of Marketing*. Vol 41 n°11/12, pp. 1518- 1544.
- Constantino, M. (1998). *Fashion Marketing and PR*. London: Batsford Ltd.
- De Pelsmacker, P., Geuens, M., & Van Den Bergh, J. (2011). *Marketingcommunicatie*. Amsterdam: Pearson Education Benelux.
- De Pelsmacker, P., & Van Kenhove, P. (2002). *Marktonderzoek: methoden en toepassingen*. Antwerpen: Garant.
- Derycke, L., & Van De Veire, S. (red) (1999). *Belgian Fashion Design*. Gent: Ludion.
- Gimeno Martinez J. (2008), Fashion, country and city: the fashion industry and the construction of collective identities (1981-2001) in: *Symposium 1: Modus Operandi*

State of Affairs in current research on Belgian Fashion. Momu – Fashion Museum Province of Antwerp, p.51-67 .

- Insch G.S., McBride J.B. (2004), The impact of country-of-origin cues on consumer perceptions of product quality: A binational test of the decomposed country-of-origin construct. In: *Journal of Business Research*. Vol 57, pp. 256-265.
- Jackson T., Shaw D., (2009), *Mastering Fashion Marketing*, Palgrave Macmillan Hampshire.
- Jayson, L., Jason, B., Mark, T., Prosku, I., Thompson, R., & Welsh, J. (2006). Consumer behavior, public policy, and Country-of-origin labeling, *Review of Agricultural Economics*, 28 (2), p. 284-292.
- Kang M., Yang S. (2010) Comparing Effects of Country Reputation and the Overall Corporate Reputations of a Country on International Consumers' Product Attitudes and Purchase Intentions. In: *Corporate Reputation Review*. Vol 13 n° 1, pp. 52-62.
- Kim C.K., Chung J. Y. (1997), Brand Popularity, Country Image and Market Share: An Empirical Study. In: *Journal of International Business Studies*. Vol 28 n°2, pp. 361-386.
- Lea-Greenwood, G. (2013). *Fashion marketing communications*. West Sussex: John Wiley & Sons Ltd.
- Koscate-Fische N., Diamantopoulos A., Oldenkotte K. (2012) Are Consumers Really Willing to Pay More for a Favorable Country Image? A Study of Country-of-Origin Effects on Willingness to Pay. In: *Journal of International Marketing*. Vol 20, n°1, pp. 19-41.
- Mennes A. (2013), Mode dit is Belgisch. Het gebruik van geografische kwaliteitslabels binnen het middensegment van de Belgische mode. Unpublished Master Thesis Master in de Toegepaste Economische Wetenschappen – Cultuurmanagement, Universiteit Antwerpen.
- Miranda M.J., Parkvithee N.. (2013), The influence of social class on the perceptions of country of origin. National brands produced in overseas locations. In: *Marketing Intelligence & Planning* vol 31 n°4, pp. 388-404.
- Parkvithee N., Miranda M.J. (2012), The interaction effect of country-of-origin, brand equity and purchase involvement on consumer purchase intentions of clothing labels. In: *Asia Pacific Journal of Marketing and Logistics*. Vol 24. No 1, pp. 7-22.
- Schrauwen J., Schramme A. (2013a), De Modesector in Vlaanderen gesegmenteerd. Study commissioned by Flanders Fashion Institute. Universiteit Antwerpen en Antwerp Management School.
- Schrauwen J., Schramme A (2013b), Annex: een gesegmenteerde bedrijfseconomische impactmeting. Unpublished study commissioned by Flanders Fashion Institute. Universiteit Antwerpen en Antwerp Management School.
- Van Den Bergh, J., & Behrer, M. (2011). *Maak je merk cool. Branding naar de nieuwe generatie*. Leuven: Lannoo Campus.

#### **Interviewed brand managers:**

- Essentiel – Tom De Poortere (Head of Design), 03/ 04/ 2013
- Le Fabuleux Marcel (Le Fabuleux Marcel de Bruxelles & Année Erotique)- Kaat Blommaert (Founder), 16/ 03/ 2013
- Kipling (VF Corporation) – Tina Debo (Vice President Product & Design), 29/ 03/ 2013

- Andres (Xandres & Hampton Bays), Mathieu Delaey (CEO) & Eva Vanhengel (Marketing Manager), 19/ 04/ 2013
- Scapa (Scapa & Scapa Sports), Philippe Verlinden (Marketing Manager), 02/ 04/ 2013

**Interviewed shop owners / branch managers:** Sawadi (Lier), La Bottega (Hasselt), Elu (Mortsel), Bel (Mortsel), Buggy's (Kontich), L'Apostrophe (Wilrijk), Alias (Mortsel), AS Adventure (Antwerp), Belvu (Edegem), Inno (Antwerp), Princess (Antwerp).