

The Internationalisation of Fashion Consumption

– Challenges for the Twenty-first Century –

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Abstract

The nature of internationalisation is explored and the historical stages in the process described. A series of profiles of fashion companies, which have pursued policies of internationalisation, is presented. The challenges faced by fashion producers and retailers, as they enter the twenty-first century, are identified and the changing context of fashion consumption is recognised.

1. Introduction

Radical developments in fashion production and consumption have occurred over the past few decades. Far-reaching changes have dramatically transformed fashion supply chain management and distribution at both national and international levels. In particular, radical innovations in communication and information technology have contributed to the globalisation of markets and to changes in the nature of consumer demand. National and international fashion events are no longer the prerogative of just a small number of leading manufacturers and key representatives of the fashion press, but rather are regarded as essential indicators to ensure future commercial success. Large retail organisations are active participants and through the willing involvement of popular national media, consumers are conversant with the dominant stylistic themes of a given fashion season. Fashion designers and catwalk models have become household names and designer and retailer brand names have become familiar status symbols to many consumers internationally.

A process of internationalisation, fuelled by technological innovations and a range of social, economic and political developments, has had a major impact on the production, distribution and consumption of fashion products. The age of the global consumer is apparent and globalisation itself has been identified as a major long-term fashion trend. [fw, Autumn Winter, 2000]. The objectives of this paper are:

To focus on aspects of the process of internationalisation.

To present a series of brief profiles of fashion producers and retailers who have readily embraced the process of internationalisation.

To identify some of the challenges faced by fashion producers and retailers as they enter the twenty-first century.

2. The Nature of Internationalisation

By the end of the twentieth century it appeared that a global marketplace had evolved in which patterns of consumption in the major urban areas displayed degrees of homogeneity. Similarities in lifestyle and behavior had developed among urban consumers world-wide, through a process which has been referred to as "world cultural convergence" [Robins, 1989]. As long ago as 1983, Levitt proposed that, "the world's needs and desires have been irrevocably homogenised" [Levitt, 1983]. The onward march of global culture and the weakening of local distinctiveness has been widely documented [Harvey, 1989, King, 1990, Robins, 1989, Sack, 1988, Shields, 1992, Zukin 1991, Crewe and Lowe, 1996]. As pointed out by Crewe and Lowe, the spread of global culture (or, more precisely, the weakening of local distinctiveness) is particularly apparent in clothing consumption. [Crewe and Lowe, 1996, p. 273]. They recognised that the global spread of [Western] fashion culture had come about "through strategies such as franchising, licensing and branding, and also through technological developments in electronic ordering, warehousing and distribution systems" [Crewe and Lowe, 1996, p.273]. Through the careful restriction of supply, retailers maintained competitive advantage in the global marketplace. The creation of the global market was primarily as a result of intensive advertising, allied with the indirect promotion of Western cultural values through satellite television and other global means of communication. In order to meet the demands of this global market, retailers and designers have pursued a process of internationalisation.

Internationalisation involves the transfer of a physical entity or a concept across state boundaries. The 1990s witnessed dramatic changes in the fashion industry. During the 1970s there were 182 instances of retailer entry across sixteen European countries, whereas in the 1980s 654 cases were reported [Corporate Intelligence, 1994, p.5]. This trend continued throughout the 1990s. The intention of this section is to discuss the nature of the internationalisation process and the means by which the activities of certain fashion designers or retailers have become multinational or global in nature.

Levitt perceived that globalisation was a development beyond multinationalism and differentiated between the multinational enterprise and the global corporation:

"The multinational operates in a number of countries and adjusts its products and practices in each at high cost. The global company operates with resolute constancy at low relative cost - as if the entire world was a single entity the worlds needs and desires have been homogenised. This makes the multi-national corporation obsolete and the

global corporation absolute" [Levitt, 1983].

Douglas and Wind [1987] gave a critique of Levitt's work. Jones considered Levitt's views in the context of the UK clothing industry [Jones 1998].

Alexander [1995, p.76] identified several historical stages leading towards internationalisation: genesis (1880~1945); emergence (1945~1974); crisis (1974~1983); renaissance (1983~1989); regionalisation (1989~2000). Each of these is briefly described below.

The first stage in internationalization, "genesis", coincided with increased urbanisation following the Industrial Revolution. Parallel developments in communication systems and improved educational provision lead to an increased demand for consumer goods [Alexander, 1995, p.78]. Retailers began to develop retail structures in industrialised areas. Access to foreign travel improved and this prompted the establishment of further outlets abroad. Going beyond their national boundaries, European and US retailers established department stores in Central and South America. A branch of Harrods (the famous British retailer) was even established in Buenos Aires [Alexander, p. 79]. Liberty and Burberry stores opened in Paris in 1890 and 1909 respectively [Alexander, p.80].

The second stage of internationalisation, "emergence", was characterised by economic and political restructuring in Europe, the increased economic and political influence of the USA internationally, the economic emergence of Japan internationally, the consequential growth in international trade and the emergence of the consumer society [Alexander p. 81]. After the Second World War, US retail companies were highly influential in the development of international retailing. Much restructuring and reorientation of the retail sectors occurred in continental Europe and Japan. Markets and accompanying infrastructures were of course weak following the devastation in much of Europe during the Second World War. In the period from 1960 to 1974 many retail operations had expanded greatly within their own national boundaries and had reached a stage of prosperity that enabled the development of international operations. International trade barriers had been lowered and in some cases removed. Examples from the British context include the Burton Group, Marks and Spencer and Mothercare. Improvements in technology, and in particular in telecommunications, also played an important role [Berry and Warfield, 1988]. The period of internationalisation was interrupted during the "crisis" period of 1974~1983 due to the series of economic shocks following the oil crisis of the early 1970s.

The period 1983 to 1989 was recognised by Alexander as the time of "renaissance", with improved economic growth permitting retailers to consider international expansion. International take over plans developed and there was extensive growth across national boundaries. In continental Europe, for example, German retailers developed interests in Austria, Belgium and Denmark [Corporate Intelligence, 1994, p.3]. According to

Alexander the advantages of geographical and cultural proximity combined to create a similar demand for the goods available. Internationalisation was also occurring on a wider front involving UK and other European retailers as well as their US and Japanese counterparts [Alexander, p.91]. The 1990s witnessed "regionalisation". Economic recession slowed international activity in retailing in the early years of the decade but did not remove it. The decline of state controlled economic systems in Eastern Europe opened up new markets [Alexander, p.92]. The introduction of the Single European Market and the development of the North American Free Trade Area caused the removal and lowering of tariffs and quotas: this prompted retailers to expand into these areas [Threadgold, 1990].

It was recognised by Dawson that internationalisation was more common among non-food retailers than food retailers and implied that fashion clothing, being less culturally sensitive than food, was more easily transferred to foreign markets [Dawson, 1994]. Dawson identified a range of factors which enabled the internationalisation of fashion retailers, and these factors were summarised by Moore as: the potentially small format size, with limited capital investment and management costs; relatively easy market entry and exit; precise consumer targeting; transferability of a single brand and store identity; suitability for franchising the brand; associated cachet of relationship with a foreign retailer; economics of replication [Moore, 1997].

3. International Activity by Fashion Designers and Retailers

International activity by fashion designers and retailers has not just been focussed on mature markets such as Western Europe, USA and Japan. Until the Asian economic crisis of the late 1990s many Asian markets, particularly those associated with the so-called "tiger economies", were an important focus of international activity. The key criteria for involvement appear to be spending power and average per capita income. Those involved in extending their activities into the former state-controlled economies of Eastern Europe such as Russia are apparently taking a longer term view: infra-structures are weak and levels of economic risk are high. By comparison, most western countries are affluent but markets are highly competitive [McGoldrick and Lui, 1994].

Following the lead given by international sports wear manufacturers, other well-known fashion names extended their brand names in a variety of ways. Designer diffusion ranges helped to extend profits without compromising status. The 1990s also witnessed the increased internationalisation of the fashion industry, with all the big fashion names attempting to strengthen the relative standing of their products. The key factors which encouraged the top fashion producers to pursue policies of internationalisation included the following: increased market saturation, with declining population levels in key demographic groups; the search for cost savings; the desire for vertical

integration and for supply chain control: the desire to diversify risk by owning a variety of brands, each of which appealed to a different market: the increased globalisation of fashion trends, particularly evident in the teenage market.

During the 1990s, mergers and acquisitions proceeded rapidly in Europe with the larger groups attempting to exercise control over even more brands [Mintel, 1999, p.37]. In the UK, during the 1990s, French, Italian and American fashion retailers were the most numerous participants and of these the French retailers were the most active [Threadgold, 1990]. The principal strategic means by which fashion retailers have achieved internationalisation of their brands have been through franchising, merger or take-over, concessions or self-start entry [McGoldrick and Lui, 1994]. Franchising enables a company to "test" the market and carries low levels of risk [Moore, 1996]. Typically, franchisees purchase their entire inventory from the franchiser. The former also pays a fee and the latter provides advertising, marketing and other promotional support. Advantages of franchising include: low cost and lower risk for the franchiser, the opportunity to employ local management who have a familiarity with local trading practices, a means of overcoming international entry barriers, no necessity to purchase property [Moore and Leroy, 1995]. Considerable market presence in another country can be achieved quickly, following take over or merger. Management and cash flow are already in situ [Sparks, 1995]. On occasions it may be difficult to evaluate a company identified for take over; inherent financial problems could make take over a costly action. Concessionary arrangements are when a company pays a retailer (typically a department store) to stock its products in an agreed space. Concession arrangements are of low risk and of relatively low cost. Self-start entry is when a retailer starts up a chain of retail outlets either from scratch or by means of acquisition of an existing chain of stores. Self-start is of high risk and high cost.

The use of electronic point of sale (EPOS) and quick response systems of production and distribution have assisted the process of internationalisation in recent years. This technology allows for the restocking of items at a quick pace.

Towards the end of the twentieth century, trade barriers between countries were lowered and certain trade relationships were formed. The establishment of the North American Free Trade Area and the Single European Market eliminated trade barriers. In the European context the possible future wider acceptance of a single currency may well further enhance the process of internationalisation. (At the time of writing there was still a debate among the British on whether or not the UK would benefit from joining the system.)

Kacker identified various "push" and "pull factors influencing the internationalisation of retailing [Alexander, 1990]. The "push" factors or conditions that cause a retailer to pursue international activity include the saturation of domestic markets, a restrictive regulatory environment, a hostile competitive environment and poor economic conditions.

"Pull" factors are those factors or characteristics, which may induce investment by retailers from elsewhere. These may include the existence of an underdeveloped retail structure with minimum levels of competition, favourable exchange rates, niche market opportunities, a large non-exploited market, and good socio-economic conditions. Further conditions which may have encouraged retailers to participate on an international basis have been referred to as "facilitating factors" [Corporate Intelligence, 1991]. These include the apparent lowering of political, economic and other perceived barriers between nations, the broader perspective taken by senior managers, the build up of expertise, the ability to assess other retailers international intentions and developments in communication technology.

As recognised by Moore, push and pull factors may not adequately explain the actual response of retailers to both domestic and international market opportunities [Moore, 1997]. In this context Alexander argued that retailers were either proactive or reactive in their responses [Alexander, 1995]. A proactive approach pursues entry to foreign markets because of the prevailing international market opportunity and not because domestic markets are saturated [Moore, 1997]. A reactive response on the other hand is because of pressures prevailing in home markets [Moore, 1997]. A series of brief profiles of designers/retailers who achieved international status by the 1990s is presented below.

The Jones Apparel Group (JAG) is the corporate title of the brand owner or licensee for several designer wear ranges. The organisation designs and markets products under various of its own labels, including Oldham and Evan-Picone and, in addition, licenses a range of brands from the Ralph Lauren Corporation, including Lauren by Ralph Lauren, Ralph by Ralph Lauren and the Polo Jeans Company label. A range of other brands such as Saville and Rena Rowan are sold in the USA [Intel, 1999 p.94].

During the 1990s the Ralph Lauren Corporation retained the title of the various Polo, Lauren and Ralph labels. The corporation produced the couture collections and the Polo Ralph Lauren diffusion ranges. A substantial aspect of the business was licensing, particularly to companies with large-scale manufacturing expertise. High levels of advertising helped to maintain the strength of the designer wear name and its associated cachet [Intel, 1999 p.94].

Widespread awareness of the Giorgio Armani brand was developed in the UK during the 1980s and was referred to in a recent Intel report as "the quintessential yuppie brand."

From a base in men's wear jackets, suits and other outerwear, the brand extended successfully into women's wear. Various sub-brands were developed including Armani Jeans, Armani Collezioni, Emporio by Armani [Intel, 1999, p.95].

A complicated relationship between brands, licensees, suppliers and manufacturers was evident on considering the context of Nino Cerruti, a brand which began as a textile

manufacturer but extended into clothing in the 1960s. By the late 1990s the name was used to license over 60 products [Mintel, 1999 p.95]. It has been estimated that there are about 1,500 retailer stores world-wide that stock Cerruti products [Mintel, 1999 p. 95].

In the 1990s, Donna Karan's ranges were aimed primarily at professional women who had an appreciation of well-cut clothes in high quality fabrics. The DKNY diffusion ranges included the Donna Karan Collection, DKNY Jeans, Donna Karan Essentials, Donna Karan Signature, Donna Karan Menswear, DKNY Men, Donna Karan Intimates, Donna Karan Hosiery, Donna Karan Eyewear, DKNY Eyewear, DKNY Coverings [Mintel, 1999 p.96].

Versace fashions are associated with celebrity status and glamour. Until his death in 1997, the designer worked closely with his sister, Donatella Versace, who ensured that the organisation continued to hold its high status. By the late 1990s there were seven principal clothing lines: Gianni Versace, Versace Jeans Couture, Versus, Versace Classic V2, Istante, Versace Sport and Young Versace. Versace diffusion ranges are widely available in Europe and North America [Mintel, 1999 p.96].

Vivienne Westwood is a British designer of international standing who had strong associations with punk rock in the 1970s. Her garments made use of British fabrics and had references to British icons and tradition [Mintel, p.96]. In the 1990s her top four ranges were the Gold Label Collection, which is couture orientated; the Red Label diffusion collection; MAN, another diffusion range; Anglomania, referred to as a "youthful rebellion" line [Mintel, 1999 p.96].

Valentino is an Italian label, which extends across diffusion ranges, youth ranges, home furnishings, accessories and perfumery. Wide international distribution is a feature. In Italy, Japan and the USA the company retails its brand through a chain of boutiques and, in the UK, distribution is principally through department stores and independent retailers [Mintel, 1999 p.97].

In the 1990s Calvin Klein advertised heavily world-wide and was probably one of the biggest clothing brands. The name is best known in the UK for its jeans, casual wear and underwear ranges; the latter sold widely in department stores, mail-order catalogues and in specialist retailers.

During much of the 1980s and 1990s Benetton, the Italian clothing manufacturer and retailer, held distinctive designer status. During the 1990s the company traded under the brand names "United Colours of Benetton", "Sisley", and "012". The company has been renowned for its casual wear for men women and children, and, in the late 1990s, had a truly international network of seven thousand stores in one hundred and twenty countries [Mintel, 1999 p.106].

Kookai is a French-owned women's wear brand which, in 1999, traded in forty-eight countries [Mintel, 1999 p.107]. High quality fashion clothing and accessories were the

focus, at price points in the upper end of the high street range. Its target market was "fashion aware" and "style conscious" consumers in the eighteen to thirty-five age range.

In the last decade of the twentieth century, Wal-Mart, the US company, was by far the world's largest retailer in terms of revenue. Its focus was on low costs, low prices, an extensive product range and a belief in friendly service and good customer relations [Payne, 2000]. The core of its business was its US discount outlets and supermarkets. The internationalisation of the company's activities began in the early 1990s with a joint venture in Mexico [Payne, 2000]. By early 2000 its revenue amounted to US\$22.73bn and operating profits to US\$817m, from wholly owned businesses in Canada, Argentina, Puerto Rico, Germany, South Korea and the UK. In addition it had partly owned interests in China, Brazil and Mexico [Payne, 2000]. Wal-Mart expects a 20 percent growth in sales and earnings to be generated from growth in international markets in the first five years of the twentieth-first century [Payne, 2000].

Internationalisation has not just been a feature of North American and European fashion producers and retailers. During the last few decades of the twentieth century, foreign branded fashions satisfied Japanese consumer expectations and, despite a troubled economy, demand remained high. In the early 1990s cash-rich Japanese companies developed interests in a number of European brands such as Aquascutum (taken over by Renown, one of Japan's main manufacturers and traders of apparel products), Laura Ashley Holdings plc (a 5.9 percent share was acquired by the Aeon Group) and Daks Simpson (acquired by Sanyo Seiko). [Mollett, 2000]. Interests were also taken in Hermes, Madame Gres, Courreges, Jean-Louis Scherrer and Martine Sibon. Onward Kashiya, Japan's largest clothing manufacturer acquired a 49 percent stake in Luciano Soprani, 100 percent of Barba's, 70 percent of IFG and 100 percent Gibo (which manufacturers for Jean-Paul Gaultier), bought up the Dolce store in Milan and, by the late 1990s, had a number of outlets in Paris, including Kashiya No 1 and No 2, Luciano Soprani, Jean-Paul Gaultier, Junior Gaultier and Kashiya Men's [Mollett, 2000]. As reported by Mollett in May 2000:

"With revenues falling, these programmes of overseas acquisitions have almost dried up. Nevertheless, demand for foreign brands in Japan-particularly mass merchandise goods-continues to be strong. In order to satisfy this market, apparel manufacturers have, over the past couple of decades, been actively tying up with foreign partners to form joint ventures. As a result, most of the top Japanese apparel manufacturers now act as sales agents for these brands, often on an exclusive basis" [Mollett, 2000].

It would therefore appear that by the end of the twentieth century joint ventures provided the most appropriate means of penetrating the difficult and very competitive Japanese market.

Mollett remarked that the Japanese apparel market was significantly different to other national markets and many foreign companies have not succeeded because they have

failed to take into account the finer details of consumer expectations [Mollett, 2000]. Mollett listed the range of differences as follows: (i) quality competitiveness is more important to Japanese consumers than price competitiveness; (ii) defective products must be identified at the inspection stage immediately following production and never by the consumer; (iii) quality of service is regarded as of equal importance to quality of product; (iv) products should be modified to suit local requirements; (v) Japanese consumers have a fine eye for detail, particularly the finer details of garment construction; (vi) packaging of apparel can also be of importance [Mollett, 2000].

Although fundamental shifts in spending patterns had occurred by the year 2000, Mollett noted that there was still a significant market for such goods among young, unmarried, highly fashion conscious working women, living in their parental homes and with a relatively high disposable income [Mollett, 2000].

4. The Challenge to Fashion Producers and Retailers

An important trend in the production and distribution chain for clothing products became apparent from the 1960s onwards. The powerful influence exercised by textile and clothing manufacturers in the supply of clothing fashions became eroded and the dominance of retailers increased until, in the late 1990s, when fashions became consumer lead, the better-informed consumer held sway. Markets became increasingly fragmented and diversified and moved from a position of only a few styles (and their derivatives) competing for market attention to a position where fashion consumption became "multi-faceted, eclectic and more globally informed and therefore empowered" [Editorial (1999) *Journal of Fashion Marketing and Management*, vol. 3, no. 4, pp.293-300]. The assumption that high fashion somehow dictated what was appropriate, and that it allowed styles to trickle down to the masses, lost credibility. The age of the consumer had arrived.

Apparently shorter product life cycles, increasingly demanding consumers, and intense competition combined to force many fashion manufacturers and retailers in both North America and Western Europe to re-evaluate their strategic positions. Faced with accusations of sameness of product at sameness of price, the invasion of stores from other countries, and a deflationary climate (with an expectation from consumers for increasingly lower prices with increasingly high quality), fashion retailers kept up the search for new means of generating more sales. At the time of writing, it appeared that the retail sectors in many Western countries were on the brink of a major shake-up.

During the last few decades of the twentieth century, major technological, economic and social changes had a profound effect on global markets. China moved closer to becoming a major world economic power, and various trading alliances developed, including the EU, NAFTA, and ASEAN. State controlled systems in Eastern Europe collapsed, and world stock markets boomed. The pace of technological change appeared

to accelerate, and with it the potential for world-wide access to information. Poverty, famine and war continued unabated, and the attention of the world news media to such events was generally only solicited when Western economic interests were threatened. Meanwhile populations world-wide were bombarded with televised images of idealized lifestyles, which in turn generated aspirations for ownership of Western consumer products including fashion clothing.

Probably the most dramatic challenge (or opportunity) facing the fashion retailing sector, as it enters the twenty-first century, is electronic retailing. This comes in a number of forms and is comprised of CD-ROM catalogues as well as television-based selling, interactive kiosks and the use of the internet.

In Western Europe and North America many retailers and consumers in the late 1990s, were of course aware of satellite television, but awareness of the benefits of interactive television, the Internet and interactive kiosks was weak [UK Fashion Report (1997) p.314]. At the time of writing, the question of whether the domestic television set or the PC will become the principal multi-media means of retailing (in the UK) was still being asked [UK Fashion Report (1997) p.314]. Interactive television has undergone a speedy development. Mail order catalogues can be put cheaply into CD-ROM form and the visual presentation can be greatly enhanced through the inclusion of full motion videos. Customers must however place an order by phone or by using the postal service. In addition, updating is not automatic.

The literature on electronic retailing includes a wide spectrum of views and opinions. In the main, observers have argued that such innovations, whether CD-ROM catalogues, cyber-shopping malls or retailer home pages, have the potential to revolutionise retailing as it was known at the end of the twentieth century [Pavitt, 1997; Reynolds, 1997; Rowley, 1996; Schneider, 1995]. In 1999, Jones and Biasiotto noted that the bulk of research on internet retailing had been consumer-based, and that this research identified a range of concerns which appeared to impede the growth and future of the internet as a retailing medium [Jones and Biasiotto, 1999]. The major concerns related to security issues, in particular fraud associated with the transmission of personal credit card details [Jones and Biasiotto, 1999]. Other concerns included slow transmission rates, inefficient delivery systems and uncertainties relating to the return of products deemed by the consumer to be unsatisfactory [Jones and Biasiotto, 1999]. A range of problems relating to currency, taxes, tariffs and shipping was noted in the context of international markets [Jones and Biasiotto, 1999]. A wide variety of advantages was also noted: the potential for 24-hour, 365 days per year consumer access; no restrictions resulting from store location, thus negating store rental and property acquisition; reduction in the need for sales staff [Jones and Biasiotto, 1999]. In the context of shopping for fashion goods, the ability to assess the precise colour, drape and textural qualities of garments are an obvious difficulty; this may however be addressed in the not too distant future.

5. The Changing Context of Fashion Consumption

Twenty-first century consumers will be knowledgeable. They will have numerous accessible sources from which to acquire knowledge. The much-publicised predictions, forecasting that various forms of information technology will replace books seem premature, at least for the next few decades. The success of online book suppliers at the end of the twentieth century and the proliferation of new large-scale book stores in various Western European cities seem to indicate that the thirst for knowledge and understanding is alive and well. An extensive series of new magazine titles appeared in North America and Western Europe during the 1990s. Radio stations and television channels are more numerous than ever before. Consumers can access information on almost every conceivable subject through the use of the internet.

Twenty-first century consumers will be well travelled. Cheap travel, arranged through specialist internet sites, using discount airlines, will allow more and more consumers first hand access to diverse cultures.

Twenty-first century consumers will demand quality of product and value for money.

The boundaries of technology will continue to be pushed to provide innovative synthetic fibres and novel processing techniques to further enhance the properties of natural fibres.

Generations of fabrics will be developed which will contain microscopic capsules of moisturisers, vitamins, perfumes, sexual attractants, anti-bacterial agents, anti-ageing creams or other stimulants. Only fashion brands, which exude integrity, authenticity and longevity will survive [fw, Autumn Winter 2000-01, p.23].

Twenty-first century consumers will be well informed and will hold strong views on issues such as eco-system destruction and pollution, child-worker exploitation, genetic modification of the natural environment and ethical investment. The longing for physical and spiritual well being may well replace the consumer greed of the twentieth century.

Twenty-first century consumers will not perceive the internet (or its successor), mobilephones, or other twentieth century innovations, as "high tech". Rather they will regard all aspects of information and communication technology as a fundamental aspect of everyday life.

6. In Conclusion

Fashion consumption in the twenty-first century will take place in an environment of accelerating change, fuelled by further technological developments in information and communication technology. Questions of logistics and delivery will be solved and electronic shopping on the internet will reach realms of virtual reality not dreamt of during the twentieth century. It is probable that the consumer will wield even more power and will expect even more from producers and distributors. In many developed

economies, improved health care will lead to an older population profile, and relevant market opportunities will open up. Children's-wear markets, on the other hand, will face a serious challenge as the number of children aged under sixteen years declines dramatically during the first few decades of the twenty-first century. Single person households will increase in number as will the proportion of professional and non-manual workers in the population. Global brands will continue to form the foundation of international fashion retailing. Fashion producers and retailers will be faced with fierce competition from providers of other goods and services, in the quest to gain a higher proportion of consumers' disposable income. Success in fashion production will be dependent on responding to consumer demand and not on expecting demand to be created after the goods have been produced. Meanwhile success in retailing will be dependent on undertaking the task of finding the new and exciting, editing out the banal and mundane and presenting the consumer with the world's most desirable package, which is of course what the consumer will demand.

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