

A Study on Trend Forecasting of the Ethnic Theme - Concentrating on Los Angeles Market in '97 F/W -

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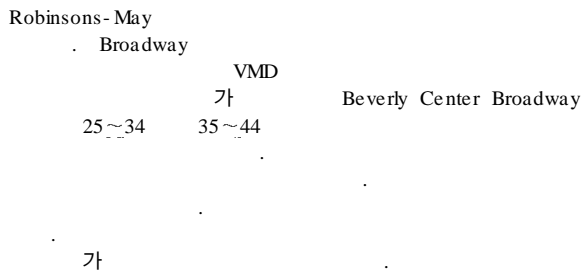
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- '97 F/W -

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This study forecasts the trend of ethnic theme through market survey, concentrating on Los Angeles market. First, the background of ethnic theme was examined, and the present situation of shops, department stores, and headquarter was also surveyed. After that, fashion trend suitable for market was suggested by analyzing the life style of consumers through zip code. The results of the study are as follows. The conspicuous trend of '97 F/W retail stores is ethnic. This is reaction to complicated modern life, and symbolizes the desirable evaluation on the simpleness of basic life and nature. The model of ethnic design is identified in natural clothing, primitive arts, ethnic culture and African theme. In short, this ethnic fashion is expressed as simpleness, naturalism convenience and freedom. On the other hand, the standard of general department stores such as Broadway and Robinson May which are the headquarter of this trend is to satisfy various consumers with various styles. Ethnic goods from Broadway has not arrived at the top for its introducing step. To elevate sales of these goods, promotion through VMD and suggesting various ethnic goods should be done. Besides, when analyzing the consumers of Beverly center Broadway, the target of these goods are mostly professional young people in their 25 - 34 and 35 - 44. The life style of these people emphasizes sophisticated life in all aspects such as job-oriented activities, and up-to-date fashion. Especially, image is very important. They want individuality different from others. These images are diversified from simpleness, naiveness to sexy character. Accordingly, suggesting fashion trend satisfying the demand of consumers through market survey will make fashion market create infinite possibilities.

Los Angeles
hadquarter , Zip code . 1997 가 가
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hadquarter Broadway



Key words : Headquaster, Trend, ethnic, Fashion, life style

I. Introduction

A prominent trend that can be seen in almost all the retail stores this season('97 F/W) is the Ethnic look. Most of the influence is borrowed from Africa and a few ideas from Asia. It symbolizes the back to basics, the simplicity of life, and the appreciation of nature which is a direct reaction to the hard economic times and the realization of the slow but sure headway we are making into the destruction of the world we live in.

As featured in the "Here & there" spring / summer '97/98 collection and the California Apparel News magazine dated March 15, 1997 the epitome of ethnic classic designs revolves around native wear, primitive arts, tribal culture and African themes.1) 2)

Its essential dynamics is the mixing of soft sportswear in sophisticated fabrication. Mixing of woven and knits, mixing of patterns, and the use of batiks and jacquards appears to have the african look. The inspirations are expected to move from Africa to Indonesia. The May issue of Mirabella magazine displayed this trend of foreign effects in fashion beautifully.3)

The fabrics used are raw silk, linen, cottoncanvas, printed cotton. As an intricacy of design, weaving designs are sewn onto the cloth or garment emphasizing the motif. The ethnic look represents an occidental way of life,

simple and roomy, allowing air to flow through the body during hot summer days.

The ethnic look is accessorized by embroideries of wood beads (resembling ethnic jewels) and hand-woven strips. A range of earth tones prevail, combined with authentic indigo and heightened by flashes of deep blue, orange or dark red.

Wether it is a blouse, a long skirt, a pair of loose pants or a vest, the style calls for loose fit but a long, slim silhouette, bold prints, and mixing of colors and patterns. One look at it is a reminder of our early civilization - When the earth was healthier and cleaner and life was simpler.4)

II. Literature Review

1. History of Ethnic Trend

The history of this current African look can be traced back to the interest in the authentic dress from the many ethnic cultures throughout the world. Among these, the West African States (Cameroon, Dahomey, Ghana, Guinea, Ivory Coast, Liberia, Mali, Nigeria, Senegal, Sierra Leone, and Upper Volta) offer one of the richest sources of design forms and decorative ideas to interest fashion designers.5) Fashion designers commonly borrow the idea from the folk art and crafts such as hand-woven cloth with unique prints, quilts and sculptures.

In West Africa, most of the cloth is hand-woven by men on a narrow, portable loom. The product is a narrow strip of cloth from several inches to a foot wide. These strips are sewn together to make larger textiles which can be worn toga style by men, as wrappers by woman, or in tailored Western style. This method of manufacturing cloth is so flexible that it allows for maximum variety in the placement of strips next to each other. Within the strip, designs and colors can be regularly spaced or staggered. When joined, strips can be aligned so as to create regular, plaid-like patterns, or open-ended and asymmetrical arrangements. These unique African patterns are simplified and adapted to an occidental way of life through the hands of the designers.

Quilts are the clear domain of black women whose work can be traced from slavery to the present. From nineteenth century quilts by Harriet Powers to contemporary examples by Pecolia Warner, they are a familiar part of the black household.⁶ Quilts are a form of salvage art in which quilt makers recycle scraps of cloth into new shapes and color combinations.

They select pattern designs and colors which are easily distinguished from white traditions.

While quilts are the domain of women, sculpture is a male dominated art form. Sculptors frequently draw inspiration for their motifs from snakes, alligators, and faces. Raw materials which are also used for sculptures are the abundant source of African fashion texture.

2. Recap of Research

According the predictives trade publications, and fashion magazines, the Ethnic Look is going to be hot. This Ethnic look is made to be relaxing and simple but is also made elegant and exciting with intricate and colorful African design motifs and textures.

3. The factors influencing the trend change

The trend developed as a reaction to the complexity and the sophistication of modern

living today. Human beings question and realize the impact of the extensive damage created by industrialization, the toxic waste that flows to our oceans, the impairment of our ozone layer, the pollution in our air, and worse... our forests and wild life have been steadily depleted.

The environmentally conscious segment of our society, mostly professionals in their thirties who had justifiable concerns about the state of the world and the future of their children or lack thereof, raised the awareness level. They may be pioneers in the Green Peace civil organization or just concerned citizens who take the responsibility to do little things like recycling or purchasing products that are "environmentally safe". This segment of our society is basically civic minded, politically correct, and they literally try to incorporate these values into a way of life for the environmental well-being of the earth. And this segment of the population is growing and is now widely accepted.

This realization came to us, hence the movement for environmental awareness was brought forth. Many nations participated and acknowledged that we have to save the world in which we lived by preserving and maintaining nature's gifts in every form of life. Therefore, leading to the blending of civilization and what is natural - simple and pure. The environmental awareness in the consumers today brought about the "Ethnic look" in all the major department and specialty stores. The designers inspired by African prints, nature motifs, and animal designs, incorporated them in their ready - to - wear apparel.

As an economic indicator, today's values and ideas about the quality of life have firmly changed through the ongoing recession. Simplicity and basic desires are the order of the day in the move towards a truly egalitarian society. The time calls for a whole new attitude in dressing with anti-status and anti-consumption. People now all crave to live in a more peaceful, equal, and beautiful world, in a naive utopia, where the stresses of economic, political

and environmental crises do not exist. And through this, the simplicity of primitive dressing and the charm of ethnic cultures have once more taken a great appeal. It is SIMPLE, NATURAL, COMFORTABLE, AND FREE!7)

1. Fashion Cycle Analysis

Upon extensive analysis, the ethnic appeal in fashion appears to be at the peak of the fashion cycle. This trend can be found in merchandise of many price points to moderate, It also meets

the criteria of being stocked in the general department stores like the Broadway and Robinsons-May in L.A. As discussed in more detail later, Broadway provided the best headquarters statement of this trend as they had the greatest number and variety in stock. Many variations of the style are being offered to a wide range of consumers especially to those who are considered "Early Majority". These customers are characteristically deliberate in their consumer buying habits but usually pick up on trends before the average person.8)

2. Dept, Store & Specialty Store

DEPARTMENT STORE (Table 1)

STORE NAME :	The Broadway	LOCATION :	Beverly center
STYLE :	Jacket		
VENDOR :	Dana Buchman		
PRICE :	\$286		
UNITS :	7- 9		
CONSTRUCTION :	Tailored jacked with two pockets, one button with African print.		
FABRIC CONTENT :	100% silk		
DETAIL/QUALITY :	Very good quality		
STYLE :	Wrap Skirt		
VENDOR :	Andrea Jovine		
PRICE :	\$162		
UNITS :	4- 5		
CONSTRUCTION :	Vest and wrap around skirt in same print in brown, black, white, blue.		
FABRIC CONTENT :	100% linen		
DETAIL/QUALITY :	Good		
STYLE :	Dress		
VENDOR :	Carole Little		
PRICE :	\$178		
UNITS :	4- 5		
CONSTRUCTION :	2 pieces (wrap top and gathered skirt)in pattern using red, brown, green, black and white colors.		
FABRIC CONTENT :	100% rayon		
DETAIL/QUALITY :	Good		
FLOOR PRESENTATION :	All above merchandise was displayed in front of the store on t-stands or 4 ways and also on mannequins.		
VISUAL PRESENTATION/SIGNING :	Mannequins in glass display and "Cross culture" signage		

DEPARTMENT STORE (Table 2)

STORE NAME :	Bullocks	LOCATION :	7th Market Place
STYLE :	Short Skirt (wrap around)		
VENDOR :	Fox & Hound		
PRICE :	\$40		
UNITS :	24		
CONSTRUCTION :	One piece wrap-around skirt "sarong"		
FABRIC CONTENT :	90% cotton / 10% linen		
DETAIL/QUALITY :	No pockets or zipper closure. Good quality		
STYLE :	Loose Pants		
VENDOR :	Sebastian K.		
PRICE :	\$52		
UNITS :	48		
CONSTRUCTION :	single needle. Gather at waist by self fabric drawstring.		
FABRIC CONTENT :	100% rayon		
DETAIL/QUALITY :	No pockets or zipper closure. Good quality		
STYLE :	Long Skirt		
VENDOR :	Indiara		
PRICE :	\$59		
UNITS :	24		
CONSTRUCTION :	Single needle. Gather at waist by self fabric drawstring.		
FABRIC CONTENT :	100% rayon		
DETAIL/QUALITY :	5 panels of cut-and-sewn, joined with crocheting as piping between panels. Good quality		
FLOOR PRESENTATION :	Merchandise placed on t-stands, grouped together in one area (front of entrance)		
VISUAL PRESENTATION/SIGNING :	Half bodied mannequins wearing the trend are placed stop the shelf, with spotlights on them.		

This ethnic trend developed through the "trickle up" reverse adoption process. As the demand for a simpler and more natural way of life arose from the masses in response to the recession, and disgust for the waste and destruction that runs rampant, designers developed the Ethnic look. It incorporates the simpler or primitive way of life in Africa with its natural wonders and adds a vibrant splash of color, pattern, and texture to cheer up everyone suffering from the recession. Ethnic inspired fashion historically incorporated pro-environmental

actions like recycling used in quilting which should also please consumers.

3. Trend Chart Analysis

Broadway : The ethnic trend in the Broadway is in the Incoming stage. Merchandise is put in front of the departments to get customers attention as the trend is still relatively new. T-stands and four-way racks are used to hand a limited amount of merchandise in the departments. Although signs with the store theme, Cross Culture, is abundant the amount of stock

SPECIALTY STORE (Table 3)

STORE NAME :	Nordstrom	LOCATION :	Brea Mall
STYLES :	I. Above & Bellow the knee sarong skirt II. Reversible jacket III. Long sleeve top		
VENDORS :	I. Ruff kewn Sportswear II. Ellen Tracy & co. III. Ellen Tracy & co.		
PRICE RANGE :	I. \$56~\$72 II. \$425 III. \$235		
AMOUNT OF STOCK :	I. Above the knee : 5 Below the knee : 4 II. Jackets : 3 III. Tops : 2		
CONSTRUCTION / DETAIL / FABRIC CONTENT / QUALITY	I. Both skirts were well constructed and 100% cotton. Above the knee had an Indian influenced print. Below the knee has Asian type of floral motif. although prints and length were different, both kept to the same earthy color combination. Good quality. II. The jacket was well constructed & reversible. 100% silk. On one side the dominant color was black w/ golden geometric tribal print. Other side was of golden bamboo w / black trim. just above knee length. Single button front and elastic sewn into waist. Long sleeved w/o collar. Good quality. III. The top matches jacket described above. Part of whole Ellen Tracy and Co. collection. Well constructed of 1005 silk. Long sleeved w/ collar & 6 buttons down front. Good quality		
FLOOR PRESENTATION :	The 4 styles mentioned were located in teh middle of the department along high traffic areas.		
VISUAL PRESENTATION :	I. The skirts were displayed on body mannequins w/a visual presentation of how the look should be w/subtle hint of lifestyle that goes along w/it II. & III. Displayed on t-stands w/body, near high traffic walkways & signs. Because these items were the latest Ellen Tracy ethnic styles		

SPECIALTY STORE (Table 4)

STORE NAME :	The Express	LOCATION :	Beverly Center
STYLES :	I . African print shirt II . Scrunch pleat skirt III . Wrap skirt in colorful ethnic prints		
VENDORS :	All Campagne International Express		
PRICE RANGE :	I . \$39 II . \$29 III . \$58		
AMOUNT OF STOCK :	I . 11 II . 35- 40 III . 30		
CONSTRUCTION / DETAIL / FABRIC CONTENT / QUALITY	I . Horizontal African stripe pattern pullover shirt in black, red, green, yellow, brown, orange. 50% cotton / 50% polyester. Good quality II . Scrunch pleat skirt w/ elastic waist in 3 pattern & color combinations. 100% cotton. Good quality. III . Single stitch wrap skirt in 3 ethnic patterns. 100% silk. Good quality		
FLOOR PRESENTATION :	I . & II . Front of store. III . Back of store		
VISUAL PRESENTATION :	I . On half bodied mannequin with ethnic wood bead necklace. Merchandise was stocked on shelves. II . Displayed only on T-stand. III . Shown on hangers at top identical pictures of model wearing item. Merchandise was on arm bar		

looks too limited. Even though the department carries a variety of items, the overall amount of merchandise does not exceed 20% in the store.

Based on this new trend item's current sale, carry out advertising strategy to reach more customers.

buyers have to re-order merchandise and carry more in stock. Buyers also plan and They can run trend theme ads in newspapers. To created a dramatic fashion trend imapct, buyers must also provide visual presentation based on the image of the trend.9)

Bullocks : The downtown Bullocks store belongs in the Pre-Peak stage of the trend chart. Mannequins displays are used heavily in this stage to attract shoppers into buying merchandise. The buyers have stocked enough inventory by this time, about 25% to 35% of its total dress volume. Extensive advertising program should be launched at this point in time, either in terms of in-house display or through the use of newspaper ads to further make the customers aware of this style and trend. In-store displays can be effective in promoting the line, as this has a direct impact on the purchasing patterns

of the customers shopping in the store.

Mannequins are used to attract the shoppers' attention towards the merchandise. Lighting effects, i. e. spotlights likewise create visual appeal. Creating a theme for the line, like Broadway's "Cross Culture" can further emphasize the line. Buyers should utilize sale mark downs as a tool to encourage purchases. The movement of the entire line has to be monitored closely, to determine which styles are moving slower than expected. A special sales promotion or markdown percentage can be made on these items. Moreover, using the "one day sale" can also increase sales, and at the same time, introduce the item or make the item more popular to the general customers.10)

Nordstrom : Based on analysis of Nordstrom's stock, the ethnic trend is in Pre-Peak on the trend chart. The ethnic look seems to be the majority of the stock carried in the women's department. It is placed in the middle of the department with mannequins displaying the key items and direction of the look. There were half rounders, 4 ways, and t-stands along main walkways with the latest ethnic styles.

There were various price points and some promotional sale signage. The look is still fresh and exciting. Buyers should reorder more stock but with caution so as not to overstock.

Mannequins and visual displays should remain on the floor to give ideas to customers who find this look difficult to visualize. Advertisements may be placed for one time only sale price events for items within this general theme.11)

Express : Based on analysis of their merchandise, the ethnic look appears to fit in between Incoming and Pre-Peak. Most of the merchandise can be found in the front but is not displayed in any of the windows and but is also found in the middle of the store. The ethnic look make up about 30% of total stock with many styles but few units of each. The

ethnic look is dispersed within a wide area and not as a clear group. This look also is not displayed prominently on very many mannequins and has very little signage. But the floor locations suggest Incoming or Pre-Peak status. To increase sales, more visual presentation is needed either via mannequins or posters of models wearing the outfits.

Advertising the ethnic look for a special sale or markdown is also suggested. Perhaps this will spark more interest in this look and better sales will result. Unless sales pick up, reorders should be questioned.12)

4. Headquarters Store

The store which gives the best headquarters statement of this trend is the Broadway. The store theme is "Cross culture" which means harmony of ethnic cultures through their clothes. There are flowing African Robes, quilted dresses, Polynesian tunics and Chinese collar silk dresses. Among these, African styles offer the greatest impact on the store image. In show cases, mannequins wear African robes over colorful slim pants. Wooden or stone ornaments that the mannequins wear enhance the African mood with the background fabrics. The major color pallets used in the visual presentation are red, blue, brown, yellow, black, green and purple which are also the primary colors in African folk art.

Besides the visual presentation, The Broadway offers a variety of ethnic merchandise while the overall amount of stock is not yet great. Since the beginning stages of Pre-Peak, the Broadway inputs more effort to announce the trend than to put much stock out.

5. Customer Profile of Headquarters Store

According to the "Lifestyle Zip Code Analyst" 13) and from general observation, customers of the Beverly Center Broadway generally are comprised of both sexes and people of all ages.

However, the presence of women and people between the ages of 25-34 predominate (27.3%).

Statistically people aged 65 and over come in a close second (25.8) but is not often observed.

The next biggest majority is the 35-44 year old group (21.6%). Statistics shows that single people outnumber married couples (42.1%). Thirteen percent have children living at home. Most of the children in this area are between the ages of 2 to 4 (3.6%), and teenagers between 16 and 18 years of age (3.1%) who enjoy shopping in the Broadway.¹⁴⁾

Although the majority of the population consists of white Anglo Saxon Protestants (WASP's) or Catholics, Broadway's location in Los Angeles assures a good religious, racial, and cultural mix.

The annual income of the greatest majority in that area falls within \$20,000 a year, which coincides with the fact that young professionals are still struggling in their career. Only 28.2% own their own home. However the next majority of 16.6% has income levels between \$50,000 -74,900 per years. Following closely is the group making between \$20,000- 29,900 per year.¹⁵⁾

Most of the shoppers hold white collar jobs or executive positions. Even those making less than \$20,000 aspire to make more and move up in the social and economic ladder. Based on observation, the social class is adequately reflected around the neighborhood of the Beverly Center. Although the mall's name "Beverly Center" seems to have been named after the famous Beverly Hills, it is actually located in the west Hollywood area, a lower middle class environment. However, since the shopping center is located a few miles east of Beverly Hills, the shopping center is able to attract the higher income market, thus upgrading its status. Due to this fact, the shopping center is actually geared towards the upper-middle class.

The lifestyles of the Broadway shopper emphasizes career oriented activities, fashionable clothing, nice cars, the best electronics equipment (vcr, computers, stereo), and a general love for the finer things in life. Some shop to attain

the look of the status they wish they could be in and others shop to show off their status. One thing that is clear is that image is very important. They also like to attend cultural events, enjoy gourmet cooking (fine foods), traveling, as well as read books.

The personalities of these shoppers tend to be positive, active, and very outgoing. The sense of style and individuality permeates this group where the need to stand out from crowd is shared by the majority.¹⁶⁾

Broadway shoppers fit the profiles of individuals in the update, traditionalist, and classic shopper groups with a smattering of traditionalists. Most people now want clothes that are of good quality, value, yet provide a fashion statement that expresses their individuality but is also functional and stylish.

The VALS 2 segments that are represented by the Broadway shopper may fall under the fulfilleds or believers groups.

IV. Conclusion & Prediction

With improved communication systems, there is a growing acceptance of the world as a single community. Due to the recession felt around the world, people have gone back to the basics and found inspiration from the simpler way of life in Africa and Asia. Basics are jazzed up with ethnic inspired prints and detailing. An item of one ethnic influence can be mixed and matched with another, All the makings of a cross cultural closet. Or they can add a splash of color and texture to basic wardrobe staples like jeans and t-shirts.

This will even grab the attention of our customers afraid of the "new".

Looks can range from exotic to simple but always earthy and very sexy. With a little creativity the fashion combinations are as exciting as they are endless.... as hopefully our sales will be.

FABRICS

Canvas (basketweaves), cotton, printed cotton,

raw silk, silk, linen, jersey, cloques, knite, cloth, lycra.

KEY FEATURES

Long, slim silhouette, ethnic print or pattern, wrap detail, beading, hoods, drawstrings, slits, topstitching, banding, engineered prints, embroideries.

ACCESSORIES

Brass & copper, naturals (bone, wood, bead), leather, hand painted designs, necklaces(longer lengths & multiple strands), long combination drop earrings, bracelets (beads & wide cuff wood), belts (narrow widths), sandals (slim sole, sling backs)

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