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# Uniformity and differentiation in fashion

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differentiation in  
fashion

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## Abstract

**Purpose** – The paper offers a general outline of four broad consumer categories or groups, in part distilled from the range of detailed and colourfully named descriptors used to differentiate fashion and clothing consumer groups, identify and recognize trends. The paper will offer the opportunity to look at the long-term impact of external forces on fashion and clothing purchasing decisions.

**Design/methodology/approach** – The method of research was diverse, but largely drawn from observation; media analysis and industry intelligence. In the course of the work, it was possible to draw on a varied range of sources to categorize purchasing decisions (illustrating consumer categories) into four main drivers.

**Findings** – Thus to highlight some of the major forces that might drive the consumer.

**Practical implications** – In reducing the detailed forecasts usually prepared for fashion and related products, the paper might be of interest to those considering the long term impacts of society, culture and politics on the purchasing decisions of fashion and clothing customers.

**Originality/value** – An insight into the medium term future of fashion taking into consideration the consumer.

**Keywords** United Kingdom, Fashion, Consumers, Society, Markets, Forecasting

**Paper type** Research paper

## 1. Introduction

Amongst the functions of fashion is to create uniformity amongst equals whilst at the same time differentiating status and background, signposting preferences and commitments. Reflecting the resulting market complexity, fashion forecasters have developed a range of detailed and colourfully named descriptors to differentiate consumer groups, identify, and recognise trends. In response, clothing retailers have grown and proliferated, chasing the increasing £'s spent on the sector as consumerism has raged across the UK and private consumption has become one of the prime movers in the British economy.

With large profits at stake, achieving the right mix of product and price has been crucial and retailers have relied on the forecasters and interpretation of the same group of indicators to give them detailed direction. However, in consulting the same forecasters, watching the same international shows and receiving the same multiple media messages, it is no surprise that much of what has been on offer is similar in style, and available locally, regionally, and internationally.

To describe and illustrate the UK clothing market in 2004, I have reduced the considerable range of ideas offered by forecasters to four broad consumer categories or groups. I will set out briefly some of the issues and contexts that are behind the formation of these groups. My premise and conclusion is that the over-arching factors that drive fashion offer longer-term indicators for fashion businesses; that fashion remains a matter of recognition and belonging, and the events and circumstances that affect our taste or purchase decisions are global and regional. The fashion market in



the UK caters for sophisticated, well travelled and media hungry consumers – it will be no surprise then that most trends are to be found worldwide, and will be recognisable in most consumer societies.

The four categories overlap, influence and relate to one another, and this is illustrated by the visual images that accompany the paper. Of the four, the final category is where much influence lies, highlighting that despite largely global factors: the value pre-occupation, domination in manufacturing, international news sharing, interdependent politics, rapid communication and shared multi media, acceptance is determined locally. The rising importance of the individual in society suggests regionalism and differentiation are not defunct. The challenge for clothing and fashion industries will be recognise broad trends whilst delivering to such customised and niche micro-markets.

## 2. UK clothing and fashion

On the face of it, the UK clothing and fashion market remains attractive because of its size, some £32 billion in 2002. According to the UK Office of National Statistics; the five-year growth rate to 2000 was 18.5 per cent. In the year ending July 2001, sales of clothing and footwear rose by 12 per cent. For comparison, the European clothing market was worth € 272 billion in 2000 with the UK amongst the leading markets. Since 1999 however, growth has been fastest in the smaller, less mature markets such as Poland, Ireland, Hungary, Greece and Portugal, with some of the historically leader markets enjoying slowest growth. In the UK in 2002, women's wear only grew by 4.1 per cent, in 2003 women's outerwear grew by 2.5 per cent and in 2004 expectations are of just 2 per cent growth (*Drapers*, 2003; *Retail Week*, 2003).

As elsewhere in Europe, specialist fashion retailers dominate the UK clothing market, although M & S is still the number one retailer and maintains a strong lead over its nearest women's wear competitors. The star performer 01-03 continues to be next, with other specialists, New Look, H & M and Oasis gaining market share. Department stores are increasingly strong in the middle market, design led arena, due to clever retail styling. The value sector has developed and "democratised" and major grocery multiples Asda and Tesco have increased their market share considerably. Last year, internet shopping was failing to live up to the hype, now there is evidence that women are gaining in confidence in shopping on line, helped by their experience with known fashion retailers such as next. As anticipated, the availability of trusted brands through the internet has accelerated acceptance.

Published research tells us that the increase in the value of the clothing market is offset against the considerable value for money offered by clothing over time. Consumers expect low prices and expect the downward trend for costs to continue. In guiding us to understand the extremely unpredictable and highly concentrated UK market, Jones and Hayes suggest that increasing incomes, particularly amongst women, are the key to increased economic activity and purchase determinants in the clothing market. With the result, that clothing and fashion purchase decisions are based on want rather than need (Jones and Hayes, 2002). The point is that clothing in the UK has changed from being a necessity to a luxury, i.e. "Luxury as standard". The purchasing decision is therefore influenced by aspiration, the sense of what is deserved and how the customer wants to be perceived.

Downward pressure on prices continues to be significant. The value of the US dollar has had a tremendous impact for those sourcing in the Far East and has funded even lower prices and protected margins. Between the years 1996 and 2000, clothing prices in the UK fell in four out of five years, and the continued shifting of production to China is anticipated to fuel an intense price war at “value” level. Competition is fierce and the market has been characterised by excessive discounting. As an indicator of price development, the working time needed to purchase a selection of garments fell by two to three times between 1974 and 1988. A study of the metal working sector found that between 1982 and 1995, the time a motor vehicle worker had to work to buy a suit fell from 25 to 18 h (IMF, 1998).

Anecdotally, there are interesting questions being raised in regard to the speed and totality of the shift of production to China: fashion oriented retailers have pressure for speed over margin and there is increasing concern in regard to ethical and other localised sourcing matters. This could be the harbinger of a new scenario for clothing and textile manufacturing in Europe.

Another portent of the requirement for caution, in May 2002 report, clothing spend was reported as having “under performed” against spending on all consumer goods. It recognised that the consumer had broadened their aspiration and demand for “fashion, the new and exciting” to technologies, telecoms, and household items. Growth in the value market highlights the determination of consumers not to pay over the odds. At every level, there is evidence of bargain seeking and questioning “why pay more”? Bargain hunting has been democratised.

The increase in retirees is significant, as are attitudes for example, toward spending on children’s clothing, once again underlining the shift from clothing as a necessity to a luxury. Most worryingly, the significant and influential 20-24 years old group are revealing some more negative attitudes to buying fashion as political and social attitudes, as well as student debt and inflation in the housing sector have kicked in.

Overall, 2004 has brought signs of a slow-down in consumerism, and this reversal of the trend for increased spending is the cause of some medium term UK concern for the future. In Europe, the fastest growing markets are reported to be Ireland, Hungary, Greece, the Czech Republic and Switzerland.

### **3. The four categories**

#### *3.1 McFashion*

What has been termed “McFashion” has become disposable, quick fix international fashion, a mix of the bland and the predictable, and trendy, throwaway chic (Lee, 2003).

#### *3.2 International superbrands*

The luxury brand continues to be a phenomenon; Fashion Designers or Designer Super-Brands with global recognition and multimillion dollar turnovers, supported by fragrance, cosmetics and widely acknowledged to have interdependency with the International Fashion Media.

#### *3.3 UK (London) style*

Perhaps for a long time the herald of regional fashion is the acknowledged style and wit of UK, particularly London based, fashion; from time to time, heralded through such hype as “cool Britannia” and universally recognised as underpinning the

International fashion houses and super brands. Despite the link to international brands, at its basis are also micro retail outlets supporting students, localised traders, aspirational super branders or recent graduates. This is the feeding ground of the international labels and “suppliers to the UK high street”. Cult status and sales are fuelled through one off magazines and pamphlets emerging through the young “cognoscenti”, stylists, journalists and the music world.

### *3.4 Micro markets*

The final category is the most interesting and important in terms of the future market for clothing and fashion. There is significant and growing evidence for the emergence of the individual as a niche market. Recognition of this group is heralded by developing interest in spirituality, anti-consumerist movements, books, pamphlets and news media, proclaiming a new age from politics to work practices. This is not “grunge based” anti-fashion, and has no single or recognisable style trait. It is a societal cultural swell and its recognition requires that future “fashion” will take into account changing life stages, cultural cross over, political and ethical motivations and individualism as an aspiration. However, whilst identifying this category through these “marketing” terms, an empathy with creativity, the product and its values are also what is emerging here.

The four categories or trends I have identified are of course overlapping and not exclusive. There are sub categories and cross group style trends. Recognising trends and forecasting demand have never been easy. The 1980s and 1990s were times when the fashion forecasting world was turned upside down in recognition of multiple styling levels, market niches, consumer types and the take over of fashion by marketing. There is evidence that what is now required could more accurately be called “intelligence”, “Style Vision” call it “mood consumption”. Many column inches in newspapers are dedicated to forecasting growth or decline in consumer spending. Merchants, economists and governments are all exercised by the guessing game and have whole armies of advisors adding to the focus group advice and feedback.

Magazines such as Viewpoint have emerged as signposts to new movements and demographics simply by gathering the “intelligence” and analysing its meaning (Viewpoint, 2004).

In 2003, internet based Style-Vision ([www.style-vision.com](http://www.style-vision.com)), in a circular advertising a round table event, offered the following theme (Style-vision, 2004): “...your customer just evolved! Did you notice?”

“A challenging landscape:

...the luxury market is trading down,

the middle segments are trading up,

mobile phone companies are hiring fashion designers,

fragrance companies are looking at furniture fairs,

the automotive industry is becoming trendy,

seniors are acting like teenagers,

men are shopping like women,

consumers are becoming more demanding...

as such, the traditional borders between consumer segments are disappearing...”

The UK market has many drivers; it is sensitive and remains as multi level and eccentric as has been increasingly the case since around 1975, recognised as the emergence of the modern market. Between 1975 and 1990, the market grew from 40 per cent of its 1999 size to 70 per cent (Jones and Hayes, 2002). Even with the current medium term jitters, the UK clothing market is a very attractive prospect.

### 3.5 *McFashion*

“McFashion” is the term Michelle Lee coined in her 2003 book to describe the first trend, enthusiastically reported through UK news media. This provocative work argues that our high streets are full of cheap chic, the clothing version of fast food. She suggests that just as McDonalds has spread all over the globe offering uniformity and predictability, so mass market clothing retailers are succeeding in offering predictable, safe, recognisable styling. It can be bland and stylistically down market, or simply a fast food version of a “star trend”, but (it) enables “buy in” to social groups and fashion trends. These are products working to formulas. Those styles not “inspired” directly by what is on the catwalk, or worn by celebrities, are basic products churned out for the masses with a “style detail” or “twist” to ensure the consumer buys in safely to the latest trend. Not only does Lee argue that this is a tendency to uniformity and consistency, it is also throwaway, cheap and reliant on our greed and anxiety to be recognisably “cool”. Less provocatively, it highlights the concern with value for money for everyday purchases that helped to polarise the UK clothing market in the late 1990’s.

If we take Lee’s argument and look for evidence, in the UK, there is our propensity to accumulate “fashion” items then destined for the bin or charity shops. In themselves, a major phenomenon. Perhaps giving a link to the fourth category and recognising that whilst we will buy into the McFashion world, we acknowledged the need for re-cycling as a sop for our greed and subsequent guilt. Big high street players nominated in the category of McFashion include GAP; H & M; ZARA; Marks and Spencer; Arcadia Group – and may be also Ralph Lauren and other “classic” designerwear. Also included: UK supermarkets; Asda, Tesco, Sainsbury, all of whom have expanded their product offer to include budget or value for money clothing as the proportion of incomes spent on food items continues to fall. They offer convenience shopping and a “buy in” for consumers seeking to buy in to fashion trend at a throw away price. Taking the supermarket clothing idea further, it is a logical extension of this business to expect internet purchases of basic items to be added to the grocery order and delivered to the door. Asda’s clothing business was last year quoted as generating sales of approximately £1 billion annually (*Drapers*, 2003; *Retail Week*, 2003).

The potential of the sector is illustrated by changes in the denim market. Four years ago total consumer expenditure on branded adult jeans (Levi, Lee Wrangler, Pepe) in the UK was 51 per cent. By January 2003, it was 31 per cent. Retailers own label denim has reversed the position and is now accounting for 49 per cent from 31 per cent (Khabi, 2003). This extraordinary development is attributed to “thinking like brands rather than retailers”. That is to design, shape, fabric innovation and quality; add to that speed to market and price. Asda’s basic five-pocket jean is retailing at £6, and even Moto’s fashion jean is £35. Thus a range of new markets for denim have opened up, leaving the traditional brands scrambling to develop value and high fashion lines, whilst the new denim producers look where next, rather than compete in a fragmented, competitive denim market.

McFashion may be characterised on the one hand by the bland and safe styling, but it extends to the fad and trend, quick throwaway fashion that relies on unerring recognition of the up coming trend, speed to market, a reliable supply chain, and in proven fashion, value for money. This is a competitive and challenging sector. It is a trend replicated in clothing and fashion markets globally, and increasingly, in the UK, McFashion is delivered by non-UK based companies such as GAP, Zara, Matalan and Uniglo.

### *3.6 International superbrands*

At the opposite end of the polarised UK market, are International Super-Brands. Whilst this diverse sector is a study in itself, for the purposes of this paper, it is useful to merge international brands or designer label merchandise into a single tendency. Led by the notion and reputation of “couture”, and as much an intangible as a tangible product, the message of these internationally branded fashion products is that the label on what you buy is critical. This is an international message led by the notion of super-luxury, rarity and quality, demonstrated (anecdotally) by the significant take up of products in this category by former eastern bloc countries as funds began to flow in to the economy. Influenced by class, money, film stars, music, Hollywood, Bollywood, sports and almost any glamour item in the media, this is big business and the stakes are high.

International superbrands, the couture and ready to wear shows, and the media circus around them, are the drivers behind the aspirational element of fashion. Most of the International houses report couture customer numbers of barely up to 200 worldwide, and the majority of sales are acknowledged to be wedding dresses adapted from catwalk looks. The couture shows are acknowledged to be fantastically effective marketing and selling tool, high impact advertising to maintain the excitement around the products that sell: the fragrances, bags, make up and the pared down ready to wear.

In the UK, the total spend on men's and women's designer wear in 2002 was estimated to be worth £1.4 billion, a rise of 19 per cent compared to 1997 (Mintel, 2002). Once inflation is taken into consideration, the value of designer wear actually rose by 40 per cent over the same period. (Mintel, 2002) Since designer wear products are priced at a premium. Consumers are more likely to buy such items when levels of discretionary income are high. A rise in the number of working women – from £12.04 mn in 1997 to £12.74 mn in 2001, a rise of almost 6 per cent – has contributed significantly to the growth in this sector.

Women's designer wear has consistently accounted for the largest proportion of this market, accounting for 57 per cent in 2002, however the men's designer wear market is increasingly influenced by the media and role models such as David Beckham, and therefore has the greatest potential for growth. In 2001 mens' designer wear expenditure was recorded as 43 per cent of the market. This compares with the 1997 figure of 39 per cent Mintel forecast growth to 2006 of £747 mn or 23 per cent at current prices. Sufficient is the worldwide importance of the luxury goods sub-sector, and its determination to retain its market share globally, that two major conferences have been held in Paris, hosted by the International Herald Tribune, in order to discuss the issues of fashion and luxury brands.

London College of Fashion's Tim Jackson, prepared a review of the 2001 conference that was published in the *Journal of Fashion Marketing and Management* (Jackson, 2002). He identified the following notable quotes from speakers and published papers:

Tom Ford: Gucci; YSL – remarked: “globalisation is inevitable . . .” and: “. . .the world has been united stylistically as it never was in the past. The entire world is watching the same films, listening to the same music and eating the same foods all at the same time. Our cultures are blending. Soon we will be one global culture”. Jean Marc Simon from Comite Colbert and Daniel Tribouillard, President of the Leonard Group, agreed that the market for such luxury goods was Europe, Asia and the USA; however, M. Tribouillard made clear that he regarded the future for luxury goods as China, Korea and Taiwan. “The growth of luxury brands . . .has been fuelled by the accelerated creation of new wealth. . .and its consumerist, status-motivated nature”. Mintel attribute a proportion of UK designer wear market growth to “a market partly fuelled by traditional mid-market consumers trading up to products sold at a premium price’.

The purpose of these conferences is to share ideas and promote strategies to ensure continuing growth in the sector. The concern being that in attracting an aspirational customer with low loyalty and perhaps superficial perception of the brand essence, the brand in itself would be damaged. Returning to growth in the market, the conference’s concern (and Mintel’s forecast for the UK) might be borne out by research in the USA. In an article in the *Harvard Business Review*, Michael J Silverstein and Neil Fiske identified a new luxury goods market for the trading up middle market (Silverstein and Fiske, 2003). They describe a new customer (in the USA), a middle market customer prepared to pay a premium for well designed, well engineered and well crafted goods. They make the point that alongside the “old” luxury goods markets there are profits to be made by creators of “new luxury goods” by those who understand the aspiration of this customer and the factors that have shaped them. They point to “higher levels of taste, education and worldliness” attributed to being “better educated, more sophisticated, better travelled, more adventurous and more discerning than ever before”.

Returning to the “old luxury brands” Tim Jackson’s parting shot in his review gives the clue for the Luxury Goods dilemma: “In a world of increasing homogeneity a big question for fashion business, luxury or otherwise, is how to reflect significant trends while being differentiated from competitors. For a luxury brand there is the additional problem of how to balance global availability on a sufficient scale to be profitable, with the requirement to be exclusive. The emergence of the multi brand, luxury group, such as LVMH or the Gucci Group NV, is one method used to increase group sales whilst maintaining individual brand exclusivity. Star designers, powerful imagery and “must have” limited editions have their place, but a key message of this conference was that a luxury brand must have integrity”.

### 3.7 UK (London) style

The extraordinarily rich creative mix that has been recognised within the UK is characterised by the London fashion scene. Since the 1960s, there has been “Swinging London”, “Cool Britannia” and many other well worn (albeit sometimes slightly embarrassing) advertising and marketing slogans. Internationally, it is acknowledged that British design graduates have unique creative abilities. The UK educates around 3,000 graduates in fashion every year. Not all are fashion designers; they are design technologists, product developers, fashion buyers, stylists, merchandisers, pattern cutters, fashion journalists, “P.R.’s” and find work across the breadth of Fashion within the UK, and Internationally to great acclaim.

However, in the spirit of the new and creative, many start their own fashion business, or work on a freelance basis. The sheer numbers that embark on this path contribute to a unique and ever flourishing market that is both created by and kept lively by, young creative energy. A proportion goes on to build long term, established Designer businesses, and in a sense they then move to our previous group and become international. When this happens, they are replaced over again, with new young businesses at the cutting edge of fashion. This sector of the industry is hugely important to the UK economy, and scrutiny of published figures show considerable growth. In 1991, a survey of the UK fashion designer Industry was undertaken by Kurt Salmon Associates, which concluded that in 1990 the worldwide turnover of UK based “designers” was £75 mn. Using the same methods, Malcolm Newbury, working for the UK DTI in 2002, estimated the figure to be £700 mn (Malcolm Newbury Consulting, 2003).

Labels such as Katharine Hamnett; John Rocha; Jasper Conran; Betty Jackson; Paul Smith, are examples of “Brit Fashion” gone International, although they are not in the Superbrand league. Some have gone into partnership with established retailers and multiples in design led partnerships that fund their own labels and presumably keep the wolf from the door. John Galliano; Stella McCartney; Alexander McQueen; Julian McDonald moved to Paris and took over creative direction of the houses of Givenchy, Dior and Chloe and have become the driving force behind the labels. Several have now established their own labels under the corporate wings of the Luxury Goods “stables” such as Gucci. Hussein Chalyan; Tristan Weber; Markus Lupfer, Rafael Lopez, Emma Cook are tipped to be exciting, if volatile, labels to watch. This category, however, to be truly a regional example, is characterised by those who have started small, or remained small, often working with teams of friends, tiny retailers and to be found in the “creative” or “trendy” areas of cities across the UK. Difficult to quantify and distinguished by its uncertainty and bravery, this is a sector that rejects the commoditisation of fashion. It has grown since the late 1970’s and now is established as a feeder for the international fashion world.

The sector drives and is driven by unique creative communities of fashion designers, journalists, stylists, graphic designers and photographers that are responsible for the new fashion media. Titles such as Tank and Purple, and lately Marmalade have followed Dazed ad Confused and I-D as style bibles for the cognoscenti, the crowd that drive UK fashion worlds and ensure that fashion is pervasive and cutting edge. The energy, bravery, idealised concepts and rawness of this group have developed considerable recognition in the past forty years. Crucially, through the global media, there is recognition that this long recognised UK fashion strength is being chased in Australia, Hong Kong, India and other developing and design aware markets as their indigenous creative strengths are recognised and applauded.

### *3.8 Micro markets*

Truly the most directional of the tendencies, the most complex and the most intriguing in terms of how we view the future of clothing and fashion. This grouping has been driven by the past four decades of increasingly rapid developments in culture and society. It is epitomised by the fact that the children of the sixties are now over 50, and the trendy young things of the decade can be 15 or over 60. They are the hedonistic, self

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focused baby boomers, and they have forsaken the trappings of retirement for clubbing, hiking and pleasure seeking – and incidentally, they want to be sold to in a way that reflects young markets. . . This is a hyper design and culture conscious culture. This is not however, “just” the group known as the “Rainbow Youth”, although they are a major factor (Viewpoint). This is a multi-dimensional, multi style group that ranges from those who demonstrate a carefree, yet studied casualness in regard to clothing and style, to those who collect international designer fashion and mix it with Top Shop chic, or antique textiles, and might have a recognisable personal style or mix and change with the weather.

Many are reacting against brands and branding, whilst nonetheless being influenced by brand values and the day to day availability of information, advice and outrage. It is a growing tendency to please oneself in relation to what one knows and interprets according to experience, aspiration, position in society or conscience; a preference to be one’s own personal stylist because life, education and society have encouraged UK consumers to have personal views. International magazines have been criticised by the media for manipulating editorial and advertising, the one dependent on the other. The result, that the fashion pages are now still full of designer clothing, but styled and camouflaged to create a specific look or describe a narrative or story simply fuels this fourth category and its individual nature.

Influences include Naomi Klein’s cult book “No Logo”, with its assertion that the most successful brands do not make anything (Klein, 2000). “Companies are switching from producing products to marketing aspirations, images and lifestyles. They are shedding physical assets by shifting production from their own factories in the first world to other people’s in the third” (Author unattributed, Economist. Com, 2001). Whilst rejecting outward and obvious brands, they are however influenced by values – will the recent political events affect direction? Most certainly, and not so slowly. This category will accept brands, but on their own terms. This sector is knowledgeable and opinionated. They have become accustomed to the bombardment of advertising and propaganda. They share the aspiration to achieve “value” with the first trend. However, the perception of value is not limited to cost, but extends to other areas of personal gratification, such as style recognition, ethics and crucially, individuality. The issues and preferences that help us recognise this tendency have been gathering for some time:

Firstly, there are the demographic changes that place 15-24 year olds and more importantly, 55-64 year olds as sectors of greatest growth (+6 per cent). These are both major players in the new influence society. The spending capacity of childless, but informed consumers, including those referred to as the pink pound or gay society. In the political and macro sense, there is growing interest, although not so recently evident participation in the growing anti-globalisation movements, with their anti-capitalist stance and increasingly action-oriented proposals. The under performing clothing market, the falling spend on clothing as a proportion of income, which suggests growing interest in broader aspects of society and (other products) or aspects of life. The increase in interest in health, well being and spiritual aspects of life; knowledge and recognition of craftsmanship and “added value”, as a fall out from international travel and education as well as technological developments that enable body fit; technical fabrics that support the need for special performance.

The individual, as a phenomenon, “non-places” suggests, is making a comeback (Auge, 1995). Customised and made to measure clothing and shoes are available through the internet (www.landsend.com), designer wear (Gucci; Brooks Brothers), and is the subject of research and commercial development at UK national level. The fashion media reference the phenomenon by highlighting opportunities for customisation, personalisation and personal stylists, to unique products (Edelkoort 02). Style Vision’s latest report is *Global Consumer Moods: Life attitudes to 2006* (Vol 2) (Anon, n.d.). They report “Consumption has entered a third phase. Mood consumption is rapidly replacing Mass Consumption and Lifestyle Consumption (Global Consumer Moods). Industries will have to re-think their branding strategies. Industries will have to re-think their product creation process and market research. In short: Industries will have to re-think their approach to consumption and consumers”. Added to this is the “non-places” suggestion that there is now the opportunity for the anthropology of individuals rather than groups. It seems that we may look forward to some long term changes to our clothing markets.

#### 4. Conclusion

The UK market for clothing and fashion continues to be excited and exciting, although it is clear that real growth may lie elsewhere in Europe. The mass market and recognition drive uniformity, but differentiation and individualism is growing. Changes in the spending patterns of (western) consumers may have an increasing impact on clothing and fashion if the final, influential, category lead the way to changed spending patterns for the future. That McFashion is global and continues to grow as the consumer society influences the developing world. Teenagers are as likely to be wearing McFashion as are 40, 50 and 60 some times. That International Super brands will protect their exclusivity whilst using aspiration and consumerism to attract a broader, multi level consumer market. That the UK regional attitude to ideas, eccentricity and creativity is the driving creative force for fashion within the UK, and to UK (London) style, and its influence on the International fashion industry. This category is increasingly replicated elsewhere and may be the major regional growth driver for fashion. The fourth category is a major driver for change. Its size and influence is far reaching and is driven by the values and aspirations of an informed, opinionated group of individuals. The character and preferences of this group may hold the key to not just clothing and fashion within the UK, but to global consumption patterns.

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