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FASHION CONSUMER SEGMENTATION – USA PERSPECTIVE

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Abstract

Knowing your customer, i.e. your target market, is critical for the success of a company and its' products. The current socio-demographic changes in the United States issue new challenges to marketers and practitioners. Actual fashion consumer segmentation approaches within the United States have received little attention in media and scholarly literature. Therefore, the aim of this paper is to present the existing academic literature addressing fashion consumer style preferences, particularly highlighting the most promising consumer groups within the United States: Hispanics and African-Americans. For this, a literature review was chosen with a subsequent critical discussion and comparison of both segments including findings of academic researches as well as market research agencies and actual lifestyle clustering approaches regarding these consumer groups. The findings show, whilst the published literature on consumer segmentation in the apparel industry provides only a superficial understanding of the fashion buying behaviors of Hispanics and Black-Americans, it could be found that both ethnic groups are highly interested in fashion, price sensitive, and they are over indexed in apparel spending habits. Especially within the Hispanic population factors such as age and level of acculturation play a vital role in the purchasing choice of apparel, footwear and accessories and require further research.

Keywords: Apparel industry · consumer classification · Hispanics · African-American · Fashion preferences

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1 Introduction

Not all consumers are alike. Last year the German sports brand Adidas had to painfully experience this itself. In the battle for customers the manufacturer of sports equipment already had to position itself behind Nike some time ago. Moreover, in 2014 Adidas got outpaced in retail sales by the U.S.-based competitor Under Armour. One reason for this setback and loss on market share was the lack of sense for the American market and its' diverse consumers. Staying up to date and understanding the difference between an Adidas consumer in the Midwest and a customer living in New York is essential for being successful but even more challenging for the sports brand since the headquarter is placed in the south of Germany. Therefore, Adidas has planed to give their branch office in Portland more creative responsibility and wants to establish a Brooklyn design studio with former Nike designers to stay in touch with their American consumers in order to meet their needs more precisely (Germano & Emmerentze Jervell, 2015). This example shows the importance of knowing your target market, your consumers and how they differ.

Especially in the United States, finding your core consumers with their individual tastes, price-consciousness and media usage is difficult, since the American market is diverse regarding the different generations, geographic dispositions, cultures and lifestyles (Moore & Carpenter, 2008, p. 323). This requires specific approaches in fashion design, retail environment, and advertisement in order to increase the success of matching a product to the consumers' wishes, i.e. to each segment's needs. For instance, people from the East Coast have different clothing desires than men and women from the West Coast (Bryant, 2010; Calderin, 2012, p. 36). U.S. residents with an African-American background have different shopping preferences than for example the U.S. Hispanic population. Especially, with regard to the predicted changes in ethnical disposition within the U.S. population, the cultural background has become the center of marketers' interest (Experian, 2013, p. 2; GfK MRI, 2007, p. 1). The Latin-American population continuously grows and the buying power of African-American women offer new possibilities for fashion retailers (Lockwood, 2012b; Nielsen, 2014). According to projections of the U.S. Census Bureau (2015, p. 1), by 2044, more than 50% of the U.S. population will be a part of a minority groups. Due to this shifts in society the American retail chain Kmart for instance launched amongst others a new Spanish line called "Sofia by Sofia Vergara" to speak directly

to its' Hispanic consumers. In order to provide an improved and integrated understanding of these issues, this paper will especially focus on the new growing consumer segments in the Unites States.

The aim of this research paper is to present the current state of the art in science and research addressing fashion profiling and consumer classification in the United States. This will be conducted by doing a literature review of the most recent publications followed by a discussion and a comparison of these academic approaches and the actual consumer clusters used in practice.

Common fashion type classification frameworks as offered for instance by the GfK Germany or the "UK Fashion Segments" by the Experian Consultancy are approaches trying to segment the population by their differences in behavior, lifestyle and foremost clothing preferences (Albaum, 2001; Experian, 2010, p. 2). However, no approach has been published applying to the North American fashion market yet. Furthermore, academic literature addressing different fashion groups end within the mid 1990ies (Shim & Bickle, 1994; Shim & Kotsiopulos, 1993). Therefore, the second chapter of this paper focuses on exploring the needs of the different market segments referring to socio-demographic and psychographic factors as well as fashion style preferences and information seeking behavior. For example how do African-American and Hispanics differ in terms of spending habits, clothing preferences, and information seeking behavior? In chapter 4, these findings will be critically reviewed.

Subsequently recent consumer lifestyle classification systems offered by different market research agencies like Mosaic® or Hispanicity™ will be presented and discussed with a special focus on fashion consciousness and clothing preferences of the single consumer clusters. In the final conclusion, the findings of the literature review are summarized as well as future implications for academic research suggested.

In the following the terms "Black-American" and "African-American" as well as "Hispanic" and "Latino/a" will be used synonymously and detailed distinction between race and ethnicity will be neglected.

2 Fashion consumer segmentation in literature – the new consumer groups

2.1 Hispanics and Latin-Americans

2.1.1 Socio-demographics and Psychographics

According to the U.S. Census Bureau (2010, pp. 2–3), the Hispanic population is one of the fastest growing minority groups in the United States and comprised about 16% (50,5 million) of the American population in 2010 compared to 12,5 % in 2000. Accounting for more than 50% of the total population's increase within these 10 years. Future prospects by the U.S. Census Bureau (2015, p. 9) expect the number of people with Latin background to rise up to 28,6 % of the total nation's population until 2060 due to higher immigration and birthing rates (Haub, 2006). For the further proceeding of this paper and the understanding of the consumer the term Hispanics, i.e. Latino, will be briefly defined: "A person of Cuban, Mexican, Puerto Rican, South or Central American or other Spanish culture or origin regardless of race" (U.S. Census Bureau, 2010, p.2). This emphasizes the diversity within the Hispanic population and gives a hint to the complexity of market segmentation within the Latin-American society. For instance, Mexican–American comprise the largest group with 63% followed by people with Puerto Rican (9,2%) and Cuban origin (3,5%) (U.S. Census Bureau, 2010, p. 3). Almost 50% of the entire Hispanic population lives in either California, Florida or Texas (U.S. Census Bureau, 2010, p. 5). Generally speaking, the Midwestern and Southern States, as well as New Jersey and Washington State are populated by Hispanics (Moreno, 2010, p. 559).

Interestingly for advertising and marketing purpose is the fact that in 2012 the average age of Hispanics was 27 years compared to the median age of the entire U.S. population of 37 years (U.S. Census Bureau, n.d.). More than 60% of the Hispanics living in the United States are under the age of 35, and only 15% are older than 40 years (Lockwood, 2012b).

Overall, U.S. Hispanics are very family oriented and closely connected to their culture and set large value on its' preservation. Some academics predict that the shift in U.S ethnic composition will enhance the need for cultural preservation within the

Hispanic population (Pires & Stanton, 2005, cited in Newcomb & Istook, 2011, p.390). Furthermore, religion, primarily Christianity, is considered to be important for Hispanics (Moreno, 2010, p. 558) .

Traditional market segmentation approaches cluster the Hispanic market by country of origin. More recent approaches operate with additional factors such as language preferences, the time resided in the U.S and foremost the degree of acculturation (GfK MRI, 2007, p. 4). Korzenny and Korzenny (2005) segmented the Hispanic market into for groups according to their level of acculturation. The Hispanic dominant group is strongly tied to their Hispanic culture and Spanish language. Bicultural and acculturated people try to find a balance, i.e. navigate, between both cultures. The third group comprises assimilated Hispanics, who are still emotionally tied to the Hispanics culture. However, they do not consider themselves as Hispanics. The last group constitutes culturally unique individuals, who do not see themselves as Hispanic or Anglo-American and establish an own cultural identity. A newer movement is the so-called “retro acculturation”. Assimilated second or third generations of Hispanic immigrants try to connect again with their cultural roots.

The importance and meaning of the Spanish language has been examined by many different studies (Experian, 2012; GfK MRI, 2007; Inglessis, 2008). It has been found that Hispanic households, especially Spanish dominant households, are still very emotionally tied to their culture and appreciate advertisement with higher loyalty and higher attention towards product and brand when advertised in Spanish (Experian, 2012, pp. 6–7). However, the manifestation of these attitudes depend very much on the degree of acculturation (GfK MRI, 2007, p. 3). According to a study conducted by Korzenny and Korzenny (2005), Hispanics have conflicting opinions about their preferred language. On the one hand they consider the English language important for living in the Unites States, on the other hand the Spanish language is and grows on importance to them in order to live and safe their cultural heritage. This tendency may have effects on apparel preferences and demand for cultural inspired clothing (Newcomb & Istook, 2011, p. 390) and will be further discussed in 2.1.3.

2.1.2 Buying Power and Behavior

In 2013 Hispanic households generated a median income of 40,963\$ (U.S. Census Bureau, 2014, p. 6). Within the last 15 years their purchasing power increased over 60% to 1,5 trillion U.S. dollars in 2015 (Statista, 2015). According to Mintel (2011, p.12), in 2008 Hispanics spend with \$2118 about 17% more on apparel and footwear than Non-Hispanics (\$1761). With this being said, Hispanics comprise about 15%, i.e. \$29,3billion, of the entire U.S. apparel sales (Lockwood, 2012b).

Especially the Hispanic teen market is predicted to be a very promising future market with large affects on the new American consumer identity. Especially in terms of fashion and clothing, the Latino market is supposed to be responsible for about 50% of the sales of the future ethnic market (GfK MRI, 2007, p. 11).

According to Cotton Incorporated Lifestyle Monitor® (2005), Latin-American females spend more time on shopping fashion in order to have the most stylish dress than their Caucasian and African–American counterparts. Moreover, the same study reveals that the Hispanic woman is not only interested in the latest fashion, furthermore she is considered to be a trendsetter. Asked how much amount of money the different ethnicities would spend on clothing, when be given \$500, the female Hispanic respondents state that they would spent over \$300 on fashion. Whereas African-American would use \$297,51 and Caucasian only \$219,58 for apparel shopping (“Latina Flavor,” n.d.).

A survey conducted in 2005 by the Hispanic Opinion Tracker shows that the Latin-American population consumes almost twice as much as the rest of the American population on apparel and accessories (Campbell, 2009, p. 20). Furthermore, according to this study the favorite stores visited by Hispanics are Wal-Mart, J.C. Penney, and Sears. These findings are coherent with the results of the 2006 Hispanic OmniTel Retail Study (del Valle, 2006). Moreover, it is reported that Hispanics and other Americans have similar preferences when it comes to selecting a retailer. Price, convenience and a wide range of product are important to the majority. However, one particular exception is apparent. Half of the Hispanic respondents prefer shops where employees speak Spanish and the labeling and signage is in Spanish as well. These findings are in someway coherent with the results published by Seock (2009, pp. 336–338), noting that customer service (salesperson’s assistance, store image and exchange policies) is most important to the Hispanic respondents when shop-

ping for clothing irrespectively of store format. The physical atmosphere in the store, e.g. window display and store layout or shopping convenience such as long shopping hours is not as critical to the respondents.

The point of purchase preferences of Hispanic consumers have been well researched within the last years (Mintel, 2011; Y.-K. Seock, 2009). However, conflicting results can be found. A study by Seock conducted in 2009 (pp.336-337) argues that Hispanic males and females prefer to shop in department stores, followed by mass merchandise stores and online shopping ranked last. Moreover, the study aims to connect retail-shopping preferences of Hispanics and their state of acculturation, i.e. years of U.S residency. It indicates that, people living for a comparatively longer time in the U.S prefer department stores for apparel shopping. Hispanic consumers with a short stay in the U.S., as well as younger Hispanics prefer websites and catalogues as shopping channels due to the lack of language abilities or their age based - technology consciousness respectively. The findings of the Mintel study, conducted in 2008, depart only slightly from the previous findings as shown in figure 1.

Where Latinos shop for clothes

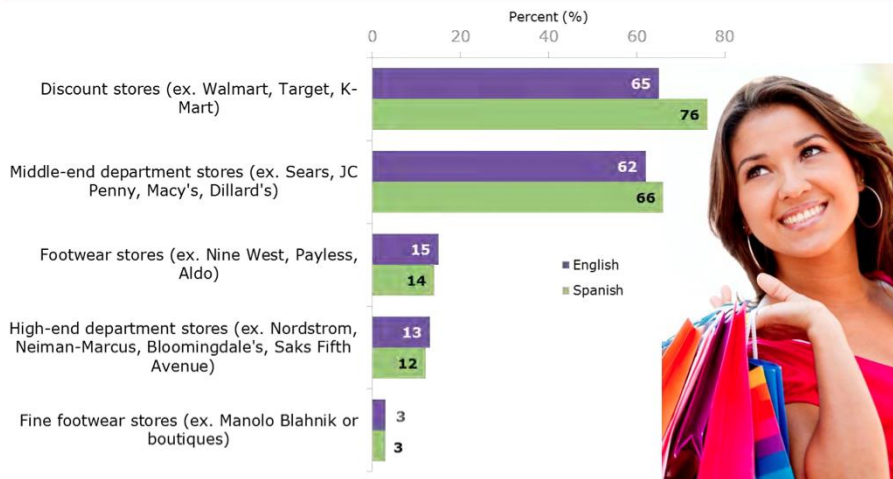


Figure 1: Store Preferences by U.S. Hispanics
Adapted from: (Mintel, 2011, p.14)

In 2012, the top visited Shopping Websites by Hispanics, were besides technology rated sites, also fashion providers such as Macy's (No. 9), Victoria's Secret (No. 11), Old Navy (No. 12), followed by Nordstrom (No. 16), and Kmart on rank No. 18. Another study conducted by Latina Insight asked 300 Hispanic females to state where the respondents have shopped during the last three months. The results are coinciding with the findings of the foregoing study. Most interviewees shopped at Victoria's Secret, Forever 21 and Old Navy, followed by H&M, and Ann Taylor Loft. Especially the trendy, feminine sexy and fun Victoria's Secret brand seems to be very appealing to Hispanic consumers (Lockwood, 2012b).

As already mentioned above, Hispanics are very family-oriented, this reflects also in their shopping habits. A national consumer survey conducted by Simmons Market Research asked 22.000 American citizens (18.542 Caucasians, 1.444 African-Americans, 1.349 Hispanics, and 640 Asian-Americans) about their buying habits in 2002. Findings show that more than 30% of the Hispanic respondents favor shopping with their family. Moreover, they prefer to shop at national chains rather than at local stores. Only 26% of the respondents think contrary on this issue (Fetto & Gardyn, 2003).

The Latina Shopper study (2010) questioned 1.200 female Latin shoppers across different levels of acculturation and classified them according to their general shopping habits. The results can be seen exemplarily in Figure 2 and entirely in Appendix C: Latina shopper profiles. The first group, "Digitalistas" (31%), comprises digital confident and highly young acculturated shoppers, who inform themselves online about products and prices. The second segment constitutes of less acculturated women with a mean age of 36,9 years. The "Las Exploradas" (27%), enjoy the shopping experience itself, they prefer "Spanish" labeled stores and packaging and do usually not shop in the Internet. The third group, "Las Pragmáticas" (23%), is highly price conscious and value seekers. The primarily less acculturated women prefer to buy at sale, use coupons and shop only what they need. The last group, "Las Fre\$itas" (20%) are young bilingual and highly acculturated women, who are not driven by price or value when shopping. They prefer national brands and tend to be highly impulsive shoppers (Redbeansociety- Strategy Consultants, 2010, pp. 2-5).



Figure 2: Latina shopper Profiles: “Digitalistas”
 Adopted from: (Redbeansociety- Strategy Consultants, 2010, p. 2)

2.1.3 Fashion preferences

According to Kim Kitchings, the director of research of Cotton Corporated Lifestyle Monitor®, female Hispanic consumers are very interested in and aware of fashion, they like to shop, and perceive brands as an important purchase factor. They are rather perceived as fashion adopters than fashion latecomers. Moreover, Hispanic females have a strong word in the fashion choices of friends and family. A similar interpretation is presented by Kim, Jolly, and Kim (2007) reporting that Hispanics are more fashion conscious and more likely to be fashion leaders compared to other ethnicities.

The NPD Group’s Consumer Tracking Service ranks factors contributing to the pur-

chase decision of Hispanics as following: price and value are most important, followed by brand and style (Lockwood, 2012b). Analogue, Seock and Sauls (2008, pp. 480–481) note that the Hispanic consumers value price, brand and degree of fashion as important for their purchase choice. Similar findings are shown by the survey of Latina Insights. Hispanic females, especially the acculturated Latinas, although very price sensitive, are interested in fashion, purchases apparel seasonally and spends about \$618 on fashion and accessories within 3 months. Most purchased categories are casualwear, footwear, lingerie and underwear, dresses, jeans, and accessories (Lockwood, 2012b). The importance of style and look for Hispanics also reflects in the large amount of beauty consumption. In general, Hispanic consumer spend more on fashion products than Non- Hispanic Americans (GfK MRI, 2007; Nielsen, 2015a).

A report released by the Cotton Corporated Lifestyle Monitor® in 2005 points out that Hispanic females have higher demands on their appearance and looks than other ethnicities. More than half of the Hispanic respondents (57%) choose design and look of clothing over its' comfort. This statement is not as considerably high supported by Caucasian (45%) or African-American (46%) interviewees (Y.-K. Seock, 2009, p. 330). In particular U.S. Latinas prefer colors and styles rooted in their culture such as red or additional lace and beadings ("Latina Flavor," n.d.). This tendency is also shown by diverse clothing lines specifically addressing the Hispanic consumer and will be discussed in the preceding course of the work.

Within the framework of a visual content analysis of photographs conducted by Campbell in 2007, U.S. Hispanic female consumers, are analyzed in three different American cities (Austin; Miami and Raleigh) with regard to their design and style preferences. The culled data was examined more closely with regard to fit, color, type of dress and pattern. Examples for fit and dress type are shown in Figure 3 and Figure 4. The findings show that only a small amount of the observed Hispanics wore loose or very loose fashion. Across all female age groups (teens, young adults, and adults) tight-fitted clothing and average-fitted clothing were preferred as seen in Figure 5. However, female teenager were more likely to wear very tight-fitted clothes. According to the author, no specific regional differences concerning fit could be shown. However, when it comes to color preferences, there are certain regional differences recognizable. For instance, Hispanics living in Austin, Texas wore more cool-colored tops, whereas participants from the other remaining cities are dressed in more neutral- and warm-colored tops. The third category "type of dress preferences" shows similar findings. Adult females living in Miami wore more dressy

clothes (51%) than the female sample set from Austin (31%) and Raleigh (35). Hispanic females from Raleigh and Texas’s capital dressed more casually. In general, teenagers over the entire data set were dressed more casually. The last attribute observed, “clothing pattern” didn’t show any specific characteristic. However, these findings should be regarded with caution since this research is very susceptible to subjectivity and individual interpretation (pp.105-127).



Figure 3: Examples of fit preferences within the Hispanic population
Adapted from (Campbell, 2009, pp. 92–93)



Figure 4: Examples of Hispanic clothing style
 Adapted from: (Campbell, 2009, p. 93)



Figure 5: Hispanic females of different age wearing tight-fitted clothing
 Adapted from: (Campbell, 2009, p. 109)

A more recent study conducted in 2010 analyzes fit preferences of young adult Mexican- American women from the Southwestern U.S.. This research does not support the previous findings. The collected data from the survey show that semi-fitted casual clothing is preferred over all items of clothing (see Figure 6). However, body shapes and sizes have an influence on fit preferences. For instance, respondents with smaller size of garment do favor a close fit compared to interviewees with a bigger body size, who prefer a more loose fit. Reasons for this divergence will be discussed in chapter 4.

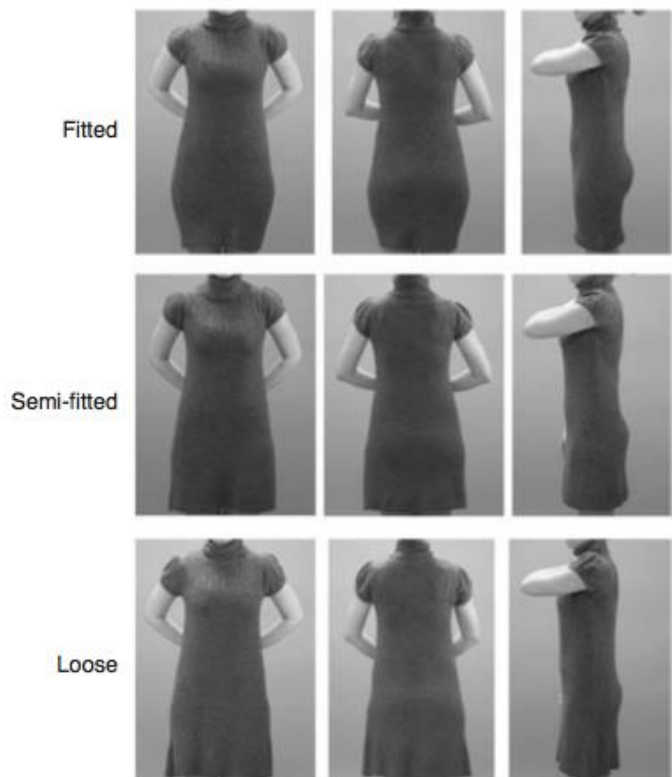


Figure 6: Level of fit preferences of Hispanic women for casual clothing
Adopted from: (Newcomb & Istook, 2011, p. 397)

An important buying criteria for Hispanic females is fit (Inglessis, 2008, p. 171). According to Newcomb (2005), half of the Hispanic population could be classified as

customers with a rectangle shape (no or almost no defined waste; upper and lower body well balanced) followed by the inverted (upper body outweighs lower body) and spoon body shape (well defined waist; bigger under body). Figure 7 shows the three dominant body shapes among Hispanic females. Furthermore, it has been found that Hispanics females are in average smaller than other ethnicities. 50% of the Hispanic women in the SizeUSA sample are identified as petite compared to 20% African-American and Caucasian. The later groups are predominating in the regular height segment (pp.96-176).

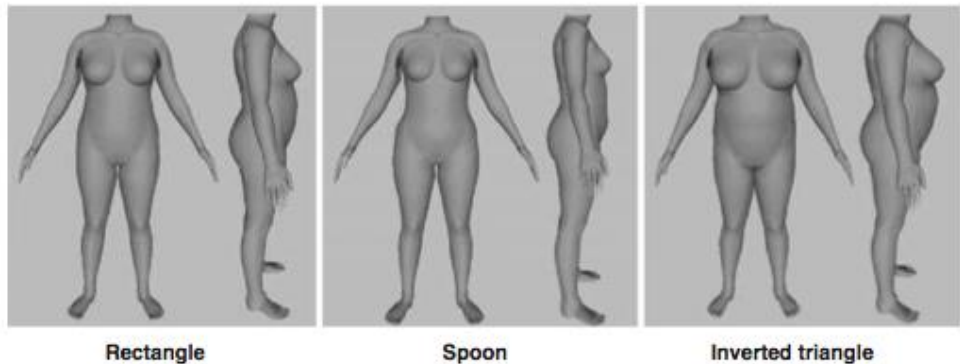


Figure 7: Dominant types of body shapes among the Hispanic female population
Adapted from: (Newcomb & Istook, 2011, p. 398)

A study by Shephard, Kinley, and Josiam (2014, p. 282) investigates and compares the tendency of Hispanics and Caucasians to be fashion leaders and find that Hispanic females are more likely to be fashion leaders than their Caucasian counterparts. Furthermore, Caucasians are less interested in fashion overall. According to the authors, this is coherent with previous findings stating that Non-Hispanics prefer and place importance on individualism. Whereas, Hispanic customers favor brand identity and advertisements displaying collectivism, since purchasing famous brands and dressing fashionable is a way to adapt and fit in the U.S society (Chattalas & Harper, 2007; Eunjung Kwak & Sojka, 2010; Singh & Bartikowski, 2009).

There is a small body of recent research investigating the correlation between the level of acculturation, clothing and ethnicity (Chattalas & Harper, 2007; Inglessis, 2008). According to Kwak and Sojka (2010, p. 375), purchasing high status apparel

fashion brands is a way to assimilate with the American culture. In the course of 10 in depth interviews with Hispanic women, primarily late fashion adopters, Inglessis (2008) investigated the level of acculturation (less and more acculturated women), fashion preferences and their social and cultural identity. Less acculturated women usually shop by themselves in order to be independently in terms of time and fashion choices. The above-mentioned finding stating that Hispanics women prefer social support while shopping applies to more acculturated women. Further differences have been found in terms of design preferences, which according to the author should be handled with care since these findings possibly depend on personal tastes. The results in this study show that less acculturated women tend to favor more bright colors, prints, patterns, and feminine details than their more acculturated counterparts due to the different ethnic influences. Especially, femininity plays a big role among the participants. According to them, femininity is via smooth fabrics, formfitting clothes, pumps, and makeup - something that differentiates them from the casual, fashion-following look of Anglo-Americans. More acculturated women tend to interpret femininity with showing their body curves, whereas less acculturated females do this through a variety of styles. The preference of less assimilated women for feminine clothing is rooted in the social construction of gender in their culture. They favor the formal style over casual clothing, since they want to be positively received by others, even if it is not fashionable. More acculturated women do not show such negative attitudes towards more casual clothing. Interestingly, besides price and quality, fit to their body is critical in their purchase decision, even more important than being highly fashionable. Furthermore, less acculturated women are not aware of seasonal clothing, i.e. are not used to choose different clothes, fabrics and colors compatible for each and every season. The preference of Hispanic women to wear brands, which convey high status, could not be supported in this study.

Another study investigates fashion preferences by Hispanic teenagers and reports that they are more endeavored to look unique and are less being influenced by family in their clothing decision than non-Hispanic teenage girls. In general, more acculturated women are less influenced by family and friends in their decision making process than less acculturated Hispanics (Chattalas & Harper, 2007, p. 354). According to Shephard et al. (2014, p. 282), these findings show that Hispanic girls put more thought into their clothing choices and are probably more amenable to fashion advertisements and promotion.

A recent publishing involving the degree of acculturation, was conducted by Insight Tr3s & Experian Simmons (2012). It has been found that more than half of the bilingual, and bicultural Hispanic Millennial respondents (61%) are interested in making current fashion statements compared to 49% of Non-Hispanics. Furthermore, Hispanics between the age of 18 and 29 are not only Fashionistas; they also belong to a new upcoming group called Recessionistas, who are looking for value for their money. According to the publishing, bicultural Hispanic Millennials living with their parents favor the “girl next door” look. Female respondents already living on their own prefer a more feminine, mature and sensual style referring to style icons such as Jennifer Lopez or Sofia Vergara. Non-Hispanic female Millennials’ clothing preferences, irrespectively of their dependency of their parents, can be split between the “girl next door” look and a more “eccentric and tough” look, according to this publishing.

Multicultural marketing becomes more important for the U.S. apparel industry, since different American retailers follow the trend and launch clothing lines that aim to appeal to different ethnic groups. “Thalia Sodi” is a clothing line offered by the Mexican pop star of the same name and Macy’s, for instance. It is supposed to target the Hispanic Non-Millennial female population with trendy, sexy, colorful and body hugging styles as seen in Figure 8. Furthermore, it is tailored to the specific needs of Latinas, e.g. shorter inseams (Lockwood, 2012b). Another example targeting the Hispanic U.S. population is the “Sofia by Sofia Vergara” apparel product line offered by Kmart. According to Diane Vaccaro, chief marketing officer of Kmart, the clothing line aims to make a fashion statement at an affordable price range (Harris, 2013, p. B1).



Figure 8: The "Thalia Sodi" Spring Summer Collection 2015
Adapted from: (Macy's, 2015)

2.1.4 Information seeking behavior

Knowing the information sources used by the targeted consumer group is important for marketers and companies in order to successfully reach their potential customers (Y. Seock & Bailey, 2009, p. 162), since information seeking behavior is foregoing the consumer's buying decision (Peterson & Merino, 2003, p. 101).

According to a report published by Cotton Incorporated Lifestyle Monitor® in 2005, the percentage of Hispanic women (60%) reaching out for advice from family and friends when buying clothing is considerably higher than the number of respondents with Caucasian (50%) and African-American background (56%). The same report indicates that Latinas tend to use celebrities as an inspirational source for their clothing choices (Y. Seock & Bailey, 2009, p. 175).

A study released by Media Behavior & Influence in 2012 notes that magazines and Broadcast TV influence Hispanic households with an minimum income of \$50,000 in their clothing purchase choice more than any other factor such as Radio, outdoor billboards, newspapers or cable TV (Bickle, 2013).

Y. Seock and Bailey (2009, pp. 169–177) have found that there are significant differences in the information seeking behavior of Hispanics between different genders and age groups. In the use of personal information source, Hispanics under the age of 30 tend even more to ask friends and family members for a second opinion than those over 30 years. Interestingly, the later use salespeople in stores as another important personal information source. In the use of impersonal information sources, store display followed by street style observation is ranked highest irrespective of age or gender. Respondents under the age of 20 and over 30 use fashion magazines, ranked third, as an information source as well. Whereas participants of the study between the age of 20 and 30 years prefer TV advertisements. Furthermore, it has been found that inspirations by celebrities play a vital role in the purchase decision of the less than 30 years old group segment. Interestingly, the Internet is the lowest ranked within all age groups. According to the authors, this might be rooted in the lack of online shopping sites offered in Spanish and the possible low ownership of computers due to the low average income of Hispanics. More recent findings published by WSL Strategic Retail in 2012, depart from this understanding. According to them, Hispanic women get well informed about products and price offerings via various channels before doing a purchase or getting clothing and styling ideas from the internet (Lockwood, 2012b).

In 2008 Inglessis (pp. 164–175) interviewed primarily late female fashion adopters with different level of acculturation. It has been found that both groups (more and less acculturated women) hardly use the Internet for gathering fashion information due to the respondents' need for actual touching and trying the tight fitted products. Furthermore, the mainly late adopters are not using TV, radio or newspaper as fashion references. However, fashion magazines for instance are more favored by less acculturated women than more acculturated women. Both groups look for celebrity fashion styles as fashion references.

2.2 African-Americans

2.2.1 Socio-demographics and Psychographics

“Powerful. Growing, Influential” (Nielsen, 2014) or “Resilient, Receptive and Relevant”(Nielsen, 2013, p. 1) are just a few headlines used by marketers to describe the African-American consumer. With a continuously increasing buying power and their influence on the entire American mainstream culture, the African-American population becomes more and more interesting for marketers and companies (Nielsen, 2013, pp. 4–5). For a holistic view, the following paper presents a brief definition of Black- and African-American as applied by the U.S. Census: “Black or African American” refers to a person having origins in any of the Black racial groups of Africa ... and Afro-Caribbean ... such as Haitian and Jamaican” (U.S. Census Bureau, 2011, p. 2).

In 2010 the African-American consumer community comprised about 13% of the total U.S. population. Within the years from 2000 to 2010 the number of Black-Americans in the U.S. grew about 15% (U.S. Census Bureau, 2011, p. 3). The number of people with African background is expected to rise up to 14,3% of the nation’s total population until 2060. With this being said, African-Americans remain the second largest minority group in the United States (U.S. Census Bureau, 2015, p. 9).

On average the African-American is with a median age of 32 years, five years younger than his or her American counterpart of any race and even seven years younger than the median White-American (U.S. Census Bureau, n.d.).

The continuous population growth and the educational empowerment of male and female have made this consumer segment more and more interesting to marketers. Especially the power of the black females is in the center of attention due to their increase in education, employment and business independency. Although men are still the primary source of income, in more than 43% of all African-American households women are the ones controlling the annual spending habits. Chances that the head of the household is female are three times bigger in African-American families than in any other race or ethnicity. Furthermore, it is interesting that 52% of all employed African-Americans are female and the bigger part of African-American businesses are run by females (Ngo, 2014; Nielsen, 2013).

Furthermore, a study by the Nielsen company (2014) revealed that over 60% of the interviewed African-American women consider the involvement with their ethnic culture and religion as important.

2.2.2 Buying Power and Behavior

The African-American buying power continuously increases. With \$34,598 Black-American households had the lowest median annual income within all U.S. race groups in 2013 (U.S. Census Bureau, 2014, pp. 6–7). Furthermore, they spend between \$474,05 and \$1,907,43 for clothing depending on their household income (Noël, 2014, p. 6). Interestingly, a 2008 study shows that African-American spend almost \$2000 more relating to their income on luxury and prestige items such as designer clothing than the average Caucasian consumer (Charles, Hurst, & Roussanov, 2008, p. 12).

Especially, the recent Black Teen market (12-19 years) has become highly interesting for marketers since they are considered to be trendsetters and have a big influence on the American mainstream culture, especially when it comes to music, sports and apparel. On average, they consume products amounting to \$96 per month with a bigger amount spend on apparel than the average American teenager. Furthermore, they are very brand loyal, especially to footwear merchandise (NPD Group, 2013, p. 11).

A study analyzing the fashion buying preferences of college female Millennials in 2009 states that almost 40% of the respondents tend to purchase clothing only a few times a year. With 21,7% shopping two to three times a month is ranked second, followed by respondents stating that they shop once a week (17%), and 13% of the respondents shop clothes more than once a week. When it comes to retail shop preferences African-American female Millennials are neutral about whether the sales personnel should be ethnically diverse. Same results have been found regarding ethnically diverse fashion ads. Moreover, the younger generation of African-Americans prefers to shop apparel in department stores, followed by specialty and discount stores. Online purchases are ranked last. Furthermore, items on sale positively influence their buying decision (Turner, 2009, pp. 25–31). Similar findings were published in a report by Experian in 2013. It has been found that African-Americans are more likely to search for deals online and offline than other races (p. 6).

2.2.3 Fashion preferences

African-Americans consider clothing and appearance as important. They prefer to be fashion leaders and to be among the first to experience with the latest fashion. Moreover, they are more likely (78%) to stop wearing clothes because they are out of fashion than the average American fashion consumer. Furthermore, Black-Americans are two times more likely as the average to make a fashion statement with their choice of clothing (Experian, 2013, p. 4). Corresponding findings are shown in a study published by Fetto & Gardyn (2003, p. 32), indicating that Black-Americans (58%) are more likely to dress in latest fashion than White (36%), Asians (46%), and Hispanics (46%). Davette (2010; p.49-55) suggests similar findings, accordingly African-American college students consider themselves as fashion leaders, who enjoy to shop, spend more money on clothing, are highly fashion savvy, and are more willing to dress for fashion and not for comfort compared to Caucasian-American students. According to a study by the GfK MRI (2011, pp. 2–12), in general African-Americans are overindexed in sales compared to Non-African-American consumers in almost every apparel product category as well as jewelry.

A focus group discussion conducted by MacDonald, Lazorchak, and Currie (2009, pp. 260–263) examines the design preferences of ready-to-wear clothing of educated African-American women between the age of 36 and 75. According to the participants, fit seems to be more important to their clothing choice than the constant following of fashion trends. They prefer clothing that can be diversely combined in a classic fashion sense, since they do not want to be the center of attention with their dress. Furthermore, they show no specific color preferences or preferences to express their cultural heritage through clothing. When it comes to cultural dress, i.e. head wraps, the participants note that they wear cultural dress due to both ethnical preservation and as a fashion statement. Moreover, they state to wear cultural dress as a political statement.

Another study analyzes the aesthetic and cultural dress preferences of African-American female college students between the age of 18 and 30 years. It indicates that the responding female students choose feminine clothing. However, no significant results could be found regarding their preference of cultural dresses, i.e. their desire to express their cultural ethnicity. Furthermore, the respondents note although they favor to purchase fashionable clothing, they somewhat tend to prefer comfortable, still good-looking clothing to latest fashion trends. Moreover in their

opinion looking good is an important part of being successful (Turner, 2009, pp. 14–37). The Cotton Incorporated Lifestyle Monitor® found similar findings in 2005. Compared to Hispanics, African-Americans are more likely to buy and wear comfortable clothes than fashionable apparel (Cotton Incorporated Lifestyle Monitor®, 2005; cited in Y. Seock & Bailey, 2009, p. 164).

Furthermore, in a study by Dixon (2007, pp. 63–71), college students were interviewed about their apparel buying habits. Interestingly, more than half of the interviewees don't perceive it as important to be received as a fashion leader, to be aware of fashion trends or to be one of the first to buy them. Moreover, ethical dressing is neither important nor unimportant for the respondents. In general, it has been found that, media, level of fashion leadership, self-confidence, self-consciousness, and the shopping excitement influence clothing choice and styling.

In addition, the importance of hairstyle became apparent and is heavily discussed in media (Davis, 2013; Desmond-Harris, 2009; Dixon, 2007; O'Neal, 2010). Hairstyling can vary from natural curly hair, braids to permanent straightened hair. The same applies to its meaning. Hairstyle statements can vary from political or fashion background to personal traits. For instance, straightened hair is considered to be more professional than a natural afro (Desmond-Harris, 2009). The amount spend on hair products and visits to the hairdresser is exorbitant high independently of income (O'Neal, 2010, pp. 539–543).

Different studies examine the ethnical divergences in fit and body measurements (MacDonald et al., 2009; Makhanya, de Klerk, Adamski, & Mastamet-Mason, 2014). According to MacDonald et al. (2009, p. 261), African-American females have different hip, tights, and bottom sizes than the majority culture in the United States. A comparison study between Caucasian and African-American females notes that almost 60% of the participants are triangular shaped, 27,5% hold an hourglass shape and the rest of the participants are rectangular shaped. However, among Caucasians the hourglass shape is dominant, whereas triangular and rectangular rank second and third. Furthermore, differences between the same body shapes have been discovered. For instance, the thigh circumference of triangular shaped African-Americans is bigger than of their corresponding Caucasian counterparts, as seen in Figure 9 (Makhanya et al., 2014, p. 190).

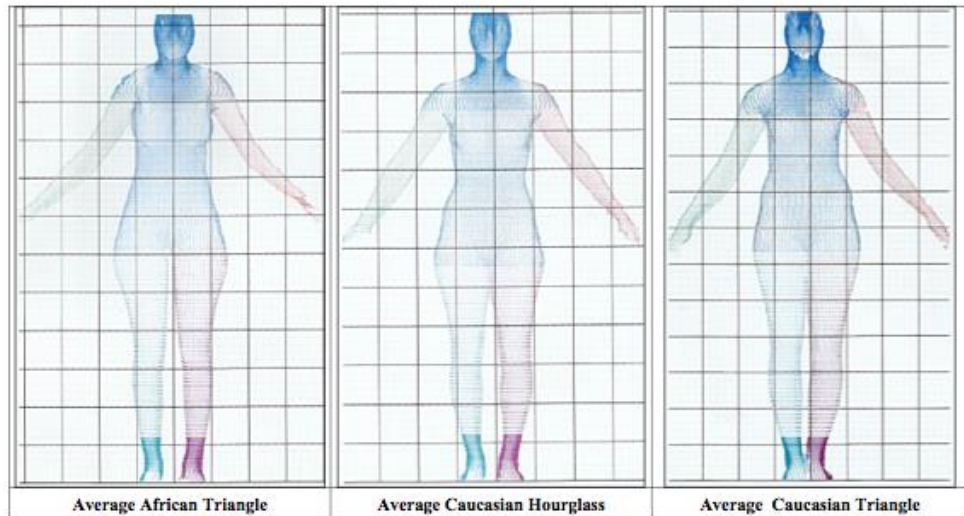


Figure 9: Body shape differences between African-Americans and Caucasians
 Adapted from: (Makhanya et al., 2014, p.188)

2.2.4 Information seeking behavior

According to a report by Experian in 2013 (pp.7-10) African-Americans are highly susceptible to any type or channel of advertising. For instance, almost 40% are more likely to buy merchandise that was promoted on their cellphone. However, they are less influenced by the opinion of friends and family than for instance Hispanics. According to the market research company, Black-Americans are more likely to be highly involved in social media and buy products advertised on such platforms than other groups. When it comes to in-store promotions African-Americans are more receptive than the average customer towards promotional displays, lighted graphics, video displays, in-store announcements or radio. Especially, African-Americans use advertising on the floor, and on shopping carts.

In order to get informed about the latest fashion trends African-American use diverse channels of media. According to a study conducted by Turner (2009, pp. 27–39) amongst college students, 78% of the respondents use the world wide web for information on fashion. Furthermore over 70% regularly read fashion and lifestyle

magazines targeting Black-Americans such as Ebony or Essence. In particular, the 18 to 30 year olds use fashion books, newsletters and television shows for additional trend information. According to this study, African-American Millennials are less influenced by their friends' opinion on their clothing choice.

Davette (2010, pp. 65–69) presents a contrary understanding of African-American fashion consumer behavior. Interviewing Black-American college students, it has been found that movies, TV, magazines, and music videos influence their clothing choice. However, they are not influenced by celebrities in their clothing choice, friends and family, or search for latest fashion trends online. Moreover, half of the respondents are not receptive to advertised apparel.

3 Fashion lifestyle segmentation by market research institutes

Within the last years the American society and therefore the American consumer market has undergone a dynamic shift: the population is aging, women choose to have children later than usual, and foremost new consumer trends arise like the steady growth of digital diversity, and the mobile movements. People are becoming more aware of the environment and turn to more healthy lifestyles (Experian, 2011b, p. 2).

Different Marketing Service institutes and agencies provide different consumer lifestyle based segmentation systems to classify the U.S households and its' customers. Socio-demographic factors, lifestyle, buying behavior and cultural factors are used to group the American population into clusters. These segments are among themselves heterogeneous but in itself homogeneous, in order to provide a precise and comprehensive understanding of the consumers' habits and preferences to be able to offer a product range and marketing approach that accurately meets the consumers' needs and expectations (Wolfe & Wolfe, 2007, pp. 77–79). As already mentioned above, since no cluster analysis has been made public yet regarding the different American fashion profiles, this paper will focus on general segmentation clusters used in the United States. In the following two segmentation systems are briefly presented with a special focus on the segment's attitudes towards fashion.

The Experian Marketing Service presented one of the first clustering approaches for the U.S. The so called Mosaic® USA identified 19 subordinate groups with 71 unique

single groups, for example the Power Elite, the Young City Solos or the Golden Year Guardians (Experian, 2011b, p. 3). Attachment B shows the full Mosaic® USA group and segment structure. Within the 71 groups only about 18% of the 71 sub-segments are brand loyal when it comes to fashion. Almost half of the groups fall back on a small budget, i.e. are price-sensitive, when buying clothes. Few percentage works on a modest budget or is not price sensitive at all. 38% of the total are interested in latest fashion, almost 31% percent aren't interested in fashion at all, and the same number is either considered as pragmatic shoppers or as late fashion adopters.

Furthermore, 10 of the 71 groups are exclusively relating to African-Americans or specifically mention an above average presentation of this ethnic group (see Table 1). The Experian Segmentation System shows a large interest in fashion (100%) within the African-American community. Over half of the 10 segments are seen as price-sensitive when it comes to buying apparel. The fashion styles vary, i.e. are evenly balanced, between “want to make a statement with their clothes”, “like to impress others”, and “being early fashion adopters”.

Table 1: Evaluation Mosaic® African-American fashion preferences

	Number of Segments	Percentage %
African-Americans only	6	8% *
African-Americans included	10	14% *
Interest in fashion i.e. latest fashion	10	100% **
Considered late fashion adopters (only go shopping if necessary)	0	0% **
Interest in fashion not mentioned	0	0% **
Small budget, i.e. price-sensitive	6	60% **
Price-sensitivity not mentioned	4	40% **
Brand loyalty	0	0% **
Brand loyalty not mentioned	10	100% **
Fashion preference		
Want to make a statement	1	10% **
Like to impress others	1	10% **
Early fashion Adopters	5	50% **
Fashion preferences not mentioned	3	30% **

* of total

** of African-Americans included

In comparison, Hispanics comprise about 18% of the total classification groups (see Table 2). Price sensitivity (77%) is apparently dominant within the Hispanic groups. An interest in the latest fashion is shown by 69% of all Hispanic or partly Hispanic groups. When it comes to clothing styles, people who like to experiment with fashion are ranked first.

Table 2: Evaluation Mosaic® Hispanic fashion preferences

	Number of Segments	Percentage %	
Hispanics only	4	6%	*
Hispanics included	13	18%	*
Interest in fashion i.e. latest fashion	9	70%	**
Considered late fashion adopters (only go shopping if necessary)	2	15%	**
Interest in fashion not mentioned	2	15%	**
Small budget, i.e. price-sensitive	10	77%	**
Price-sensitivity not mentioned	3	23%	**
Brand loyalty	0	0%	**
Brand loyalty not mentioned	13	100%	**
Fashion preference	-		
Enjoy experimenting with fashion	2	15%	**
Emphasizing quality and prefer conservative clothing	1	8%	**
Prefer new style and designer labels	1	8%	**
Wear Hip Styles	1	8%	**
Like to impress others	1	8%	**
Value-conscious	1	8%	**
Status recognition	1	8%	**
Fashion preferences not mentioned	5	37%	**

* of total

** of Hispanics included

It should be noted that this evaluation is based on a brief description published by Experian (2011). Furthermore, certain clusters do apply to entire families and are not exclusively restricted to individuals. Therefore, no conclusion can be drawn from this regarding an actual fashion consumer classification system. Furthermore, the subjectivity of the author during the segmentation and clustering process, especially in terms of fashion preferences, should be taken into account. However, this analysis

presents tendencies of both ethnic groups which will be discussed and compared with previous findings in chapter 4.

In addition, similar models such as the PRIZM segmentation approach by the Nielsen Company (Nielsen, 2015b) or the VALS by SBI (Strategic Business Insight, 2015) are offered. Unfortunately, there is no detailed information about these segments and therefore no inference can be drawn towards fashion type profiling or ethnicity.

Very interesting for the further course of this paper is the consumer acculturation segmentation Hispanicity™ by Geoscape®, which splits the U.S.-Hispanic population into five segments according to their adaption of the American culture (e.g. cultural practice, language, etc.) (Scarborough, 2015). The “Americanizado” group is primarily English speaking, and born mostly as third generation in the United States. The “Nueva Latinas” favor the English language they speak some Spanish though. They are often born as a second generation in the United States. Furthermore, they practice some cultural habits and are among the “retro –acculturated” Hispanics. The third group is called “Bi-Cultural Hispanics”. They speak both languages equally, usually came to the U.S. as children, and preserve various cultural ways. “Hispanio” are Spanish dominant, immigrated to the U.S. when they were adults, and favor Spanish cultural practice. The last segment, “Latinoamericana”, does merely speak English. They recently came to the U.S., and can relate themselves more to their native country than to the U.S. (Geoscape®, 2014, p. 5). A publishing by the GfK MRI (2009) reveals that Hispanics, independently to which segments they belong, see themselves as early adopters. Furthermore, it is shown that with less acculturated level, Hispanics are more likely to be influence by celebrities, brand names, and the approval of related parties. However, the rising level of acculturation and the opinion leadership are opposing trends (see Table 3).

Table 3: GfK MRI Hispanicity Buying Insights

Hispanicity Buying Insights											
	Americanizado			Nueva Latina		Bi-Cultural		Hispano		Latinoamericana	
Agree "Completely" or "Somewhat" With Statement	% of Adults	% of Adults	Index	% of Adults	Index	% of Adults	Index	% of Adults	Index	% of Adults	Index
I'm always one of the first of my friends to try new products or services.	27.9%	33.4%	120	34.1%	122	31.6%	113	34.8%	125	35.1%	126
A celebrity endorsement may influence me to consider or buy a product.	16.6%	17.8%	108	19.4%	117	24.1%	146	24.7%	149	29.5%	178
Brand name is the best indication of quality.	35.5%	36.4%	102	38.7%	109	41.9%	118	37.8%	107	50.8%	143
People often come to me for advice before making a purchase.	37.6%	43.2%	115	42.9%	114	38.3%	102	38.2%	102	38.1%	101
I prefer to buy things my friends or neighbors would approve of.	21.8%	20.4%	94	24.4%	112	27.3%	125	26.1%	120	32.3%	149
Source: Doublebase 2008 MRI Survey of the American Consumer. Field dates: March 2006–April 2008. Based on Adults 18+											

Adapted from: (GfK MRI, 2009)

4 Discussion

The previous chapters presented fashion preferences and buying behaviors by Hispanics and African-Americans to explain differences between and within each ethnic group. While observing the different aspects of these theories several points seemed open to interpretation. In the following some striking points from these findings will be discussed in detail.

In general, the usefulness of segmentation in a constantly changing and dynamic market with steadily shifting consumer lifestyles is heavily debated (Hines & Bruce, 2007). Not every potential consumer fits into one segment. According to Rosenau (2014), “the number of segments is a qualitative decision rather than one governed by scientific rule” (p.87). Consumer clusters are estimations of reality (Wedel & Kamakura, 2000, p. 329). Therefore, it is necessary to adjust a company’s segments to its’ own needs, since not every segmentation system is suitable for a company.

Moreno (2010, p.558) notes that ethnic identification is important and affects purchase behavior of ethnical subcultures and needs to be considered by companies. An article published by National Geographic named “The changing face of America” shows how cultural divers the country is and will be in the future. The new American consumer will have more than one ethnical background (Funderburg, 2013). However, it should be critically reviewed to cluster mainly by ethnicity.

Comparing both ethnicities, it can be stated that the Hispanic clothing culture gains more attention in literature than the African-American fashion choice. In the following, similarities and differences between both groups, but also opposing results between publications will be discussed.

The Hispanic population comprises the largest minority group in the U.S. and is with a median age of 27 years, five years younger than the average African-American. However, compared to their Caucasian counterparts both groups are considerably younger. A constantly upcoming topic in literature is the level of acculturation and its' impact on fashion choice, especially when talking about Hispanics. The segmentation approaches by Korzenny and Korzenny (2005) and by GfK MRI (2009) coincide mostly, classifying Hispanics by their time of residence in the U.S. and their preservation of Spanish heritage. Furthermore, a new movement called "retro-acculturation" has gained attention from marketers. Especially regarding the predicted shifts in ethnical disposition in the United States. Moreover, the country of origin is important when marketing to Hispanics, since Hispanics originating from Mexico, Puerto Rico or Cuba reveal subcultural variations in style taste and language (Moreno, 2010, p. 558; Newcomb & Istook, 2011, p. 391).

The above addressed literature agrees, that in general Hispanics tend to spend more money on clothes, footwear and accessories than Non-Hispanic Americans. Furthermore, they are more likely to be interested in the latest fashion, and to be fashion leaders respectively. The importance of style and look for Hispanic females is confirmed throughout all studies. However, detailed findings regarding the preferred fashion style are difficult to find and furthermore, existing publications are considerably drifting apart. In general, it can be derived from the literature and the data analysis of the Mosaic® segmentation approach that Hispanics are interested in fashion, independently of their level of acculturation and level of fashion involvement. Even late fashion adopters are interested in being perceived positively and appropriately dressed. According to Inglessis (2008), the disfavor of casual dress of less assimilated women and their preference for feminine details might be due to the social construct underlying in Hispanic culture. Slightly different findings are shown regarding the style preferences of teenagers. Whereas, Campbell (2009) notes that the bulk of participants wears a casual clothing style, Chattalas and Harper (2007) as well as a study by Insight Tr3s & Experian Simmons (2012) show that later aged teenagers as well as young adults primarily prefer to look unique and to make a fashion statement. The later restrict their research to bicultural teenagers and find fur-

ther distinctions regarding fashion style within this segment. Nevertheless, the divergent findings may be due to differences in age, acculturation level, country of origin as well as recent place of residence and needs further research. Especially age might be another reason for this divergence since Chattalas and Harper limited their research to later aged teens, whereas the Insight Tr3s & Experian Simmon study focused on young adults between the age of 19 and 29. In addition, Campbell's research shows no detailed description of the participant's age range due to the chosen methodology. Furthermore, the later research is seen critically since the choice of data collection is highly susceptible to subjectivity as well as stereotyping and does not include the different levels of acculturation or fashion involvement and therefore might depart from other researchers' results.

On the contrary, fit preferences and body shape differences are quite well researched (Campbell, 2009; Makhanya et al., 2014; Newcomb & Istook, 2011). It has been found that Hispanic females have different body shapes than Caucasians or African-Americans. However, findings of Newcomb and Istook (2011) as well as Campbell (2009) regarding fit preferences are slightly differentiating. According to Newcomb and Istook (2011, pp. 400–408), the divergence between these two studies may be rooted in the geographic diversity among the participants or the stereotyping approach used by Campbell, that is clustering all Hispanic females into one groups irrespective of their country of origin. Furthermore, Newcomb and Istook focused their research on casual clothing, whereas Campbell had no style limitations. In general, it can be said that Hispanics tend to prefer more fitted clothing than loose-fitted fashion. This is important since fit is a critical purchase decision for the Latin-American population (Inglessis, 2008, p. 171).

Throughout the literature review price is ranked before brand and style. This is coherent with the findings from analyzing the Mosaic® segmentation approach stating that over two third of the segments are price-sensitive. When it comes to brand loyalty, the bigger part of literature argues that Hispanics are brand loyal.

All above mentioned studies show that Hispanics are highly influenced by the clothing choice of celebrities independently of their level of acculturation. This tendency is reflected in the rising number of clothing lines of Hispanic celebrities, launched by American retailers. In general, TV, magazines, and store display are used as impersonal information sources. The use of the Internet as an information source is critically discussed. Inglessis (2008) as well as Seock & Bailey (2009) claim that the World

Wide Web is not as common within the general Hispanic population for fashion information research. Although it has been found that the younger Generation as well as less acculturated Hispanics prefer to visit online shops for apparel shopping. A more recent study by WSL Strategic Retail (Lockwood, 2012a) argues that Hispanic women are more aware of the internet and mobile shopping than any other female demography, though. The divergent results might be due to the changing mobile and digital trends in society as well as the continuously growing use of the World Wide Web within the last years as well as the current low median age of the Hispanic population.

Another highly discussed issue pertains to family and friends as an impersonal information source. Whereas, Chattalas and Harper (2007) argue that older teenagers and more acculturated women are less influenced by their families' opinion while shopping, Inglessis (2008) states that less acculturated women enjoy shopping by themselves and more acculturated women tend to ask for a second opinion. Moreover, Seock and Bailey (2009) state that Hispanics under the age of 30 are more likely to ask for a second opinion by friends and family than Hispanics over 30 years. Supporting the findings of Chattalas and Harper (2007), the Hispanic Buying Insights by the GfK MRI (2009) note that people with higher acculturation level tend less to obtain approval when purchasing products.

The rising number of clothing lines addressing Hispanic females shows the new emerged potential of this market segment. Moreover, the clothing lines reflect many of the literature findings (Campbell, 2009; Inglessis, 2008; Lockwood, 2012a) such as price sensitiveness, colorfulness and the need for femininity of more mature Hispanic females.

In summary, it can be said that although having high potential the Hispanic fashion consumers and their behaviors have perceived little academic attention. The inconsistent findings are beside general differences in gender and income, probably due to the participants' diversity regarding age, acculturation level, country of origin and recent place of residence. The chief executive of Target confirms the later by stating that consumers living in Miami are different from customers in Texas, Arizona, etc. (Harris, 2013, B1). Shawn Outler, the group vice president of Macy's puts this in more concrete terms by stating: "They are one of the first to adopt. They like newness and freshness. That comes in many different forms. In one place it could be about a logo, and in another place it could be about prints"(MacDonald et al., 2009).

The depicted contradictions make the need for further research and especially clustering approaches apparent. Since, as presented above, not all Hispanic females have the same lifestyle and fashion tastes.

As already mentioned fashion preferences and buying behaviors addressing African-Americans are not as dominant in literature as they are for the Hispanic population. Overall, both ethnicities tend to spend more money on apparel, footwear, accessories and beauty products than the average American consumer with African-American slightly being ranked behind Hispanics (“Latina Flavor,” n.d.). Furthermore, literature (Experian, 2013; Turner, 2009) as well as the data analysis of the Mosaic® segmentation approach considers African-American just like Hispanics as price-sensitive.

O’Neal (2010, p. 540) addresses acculturation, and retro-acculturation respectively, in the context of African-Americans. According to the author, clothing preferences depend on whether men and women see themselves as more African or American. However, this may change over time. Nevertheless, ethnic involvement is seen as important by a larger part of the African-American population. Furthermore, expressing ethnicity through clothing is in some way important to Baby Boomers and Generation X. On the contrary, Millennials are neutral about their need to express ethnic involvement through fashion. In this regard, no significant findings with reference to Hispanics are apparent.

However, by comparison to Hispanics, African-Americans do not consider ethnical diverse sales personnel and individual tailored ads as important probably due to different language preferences. Similar to the Hispanic Teen market, the African-American teenagers become more and more interesting to marketers and companies. Especially, since they are considered to be trendsetters and have a huge influence on the American mainstream culture. In general, academic literature, data analysis of actual segmentation approaches, and publications by market research agencies agree that African-Americans are highly interested in fashion, and are more likely to be early fashion adopters than the average American. However, further research by MacDonald (et al., 2009) notes that comfort and fit are more important to African-American females than fashion trends independently of age. Comparing Hispanics and African-Americans in terms of their body shapes, differences become apparent (Makhanya et al., 2014; Newcomb & Istook, 2011). Whereas, African-Americans are predominantly triangular shaped, Hispanics tend to have a

rectangle body shape. Companies should take these divergences between different ethnic groups, but also ethnical differences within a body type classification into consideration.

Both Turner (2009) and Davette (2010) have analyzed the fashion information seeking behavior of college students in the United States with diverging results. This may be due to the respondents' diversity regarding place of residence and level of fashion involvement. Overall, the larger body of literature (Experian, 2013; Turner, 2009) states that African-Americans are highly responsive towards advertisement and use in store promotions, social media, the internet and fashion magazines as impersonal information sources. In comparison to Hispanics, celebrities or related parties are not used by African-Americans, and influence their fashion buying choice respectively.

Clothing lines specifically targeting African-American consumers are not as present as for Hispanics. According to WSL Strategic Retail president Wendy Liebmann, "Fashion retailers have been looking in other directions, like teens, Hispanics, [Baby] Boomers, etc. Therefore, the choice of fashion for African American women is marginal" (Lee, 2005, p. n.d.).

Finally, it should be stated that the previous discussion could not cover all aspects that influence the consumers purchase behavior and thinking towards fashion in depth.

5 Conclusion

The present paper aims to depict the current body of literature regarding consumer segmentation and fashion aesthetic preferences within the United States especially with regard to the rising consumer groups: Hispanics and African-Americans. In this chapter the results and conclusion of the previous academic literature review, marketing services' publications and data analysis of actual American consumer segmentation approaches will be presented and the importance of future research in this field of study will be demonstrated.

During the research it became apparent that published literature on actual and practiced consumer segmentation and fashion style personalities within the United

States is not publicly available. However, the rising potential of both analyzed consumer groups, Hispanics and African-Americans, draws attention to marketers, media and academics due to their clothing spending habits, their interest in appearance and foremost the prominent demographic shifts in society. Nevertheless, the published literature on consumer segmentation in the apparel industry provides only a superficial understanding of the fashion buying behaviors of Hispanics and Black-Americans. No detailed information about design preferences or segmentation approaches have been knowingly published yet.

Although a simple segmentation based on ethnicity is not worthwhile, subcultural influence plays a vital role in the understanding of consumers' behavior and their purchase decision making process (Chattalas & Harper, 2007, p. 352; Moreno, 2010, p. 540). This in connection with the growing number of U.S residence with one or more subcultural backgrounds and new emerging movements such as the "Retro-acculturation" of Hispanics as well as African-Americans, will pose new challenges for many companies and marketers.

The present paper provides a framework for future research to understand the fashion purchase behaviors of the observed groups with regard to design preferences, spending habits and buying power, as well as information seeking behavior. The academic research shows significant differences between and within the different ethnic groups. Throughout the literature it is generally accepted that both Hispanics and African –Americans are highly interested in fashion and price-sensitive independently of age, place of current residence and acculturation level. Furthermore, both segments spend more on clothing and accessories than the average American consumer. However, with a more detailed look, differences could be found. In particular the African- American population is considered to be an early fashion adopter.

As a part of research, acculturation and country of origin became apparent as dominant purchase factors within the Hispanic culture. For instance, less acculturated Hispanic women prefer feminine, bright colored clothes with big prints and patterns due to their need for gender differentiation, which is rooted in their cultural construct. In the context of African-American, assimilation and cultural identification is only partly addressed in literature.

Although only looking on the face of it, the presented studies give hints to existing

differences in fashion design preferences within the ethnic groups due to the level of acculturation with the U.S dominant culture, ethnical identification, age, country of origin, and place of residence. Furthermore, fit emerges to be an important fashion buying criteria, even before style, within both ethnicities. In this connection, companies should be aware of the different body shapes and fit preferences of Hispanic and African-American females.

Ethnic involvement, i.e. expressing ethnicity through clothing, has been primarily addressed in the context of African-Americans. Cultural dress, for instance head wrap, is worn more within the older generations, either as a fashion or political statement, whereas teenagers are neutral about it.

Another heavily discussed issue regards the information seeking behavior of both consumer groups with divergence findings especially when it comes to the use of the Internet. In conclusion, it can be stated that Black-Americans are more receptive to any kind of advertisement than Hispanics. The later prefers advertisement and store sign display in Spanish and is highly influenced by fashion choices of celebrities, whereas African-Americans rely more on social media and fashion magazines.

The above presented and often-contradicting literature findings support the theory of Moreno (2010, p. 563). According to the author, the composition of factors such as education, buying power, individual values, gender, place of residence, job, age and in the context of this work ethnic background as well as level of acculturation play a vital role in the decision making process and should be considered when clustering consumers. The unique combinations of these attributes need further investigation in order to understand one's target market entirely. Therefore, future research should continue to investigate the different consumer segments within each ethnic group in order to better approach these promising and growing market segments and to avoid the stereotypical approach as it is often used in the presented literature and publications.

Another interesting field of research could address the Hispanic as well as Black-American teen market segment. In particular, the African-American Teens are promising customers due to their apparel spending habits and their influence on the U.S. mainstream culture.

Overall, the findings from this literature review are limited in certain matters. The sample of some reviewed researches and surveys do only portray a minor part of the U.S. Hispanic and African-American population. Furthermore, not every presented study provides detailed information about age, gender, and acculturation level dispositions of their sample data. Finally, the respondents' sense of self, regarding their fashion styles and adaption, i.e. whether they are early or late fashion adopters, may not reflect the reality and therefore might impair research findings.

In conclusion, it should be said that it requires further investigation in order to understand these contradicting results and receive more clarity, particularly with regard to the major potential of both groups for the apparel industry.

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Appendix A: Database Hitlist

Search term	Web page	Hits	Date
"fashion segmentation"	Google Scholar	70	25-Mar-15
"fashion classification"	Google Scholar	104	25-Mar-15
"fashion segmentation" AND "U.S."	Google Scholar	51	25-Mar-15
"fashion classification" AND "U.S."	EBSCO Host	39	28-Mar-15
"apparel industry" AND "segmentation"	Emerald Insight	55	28-Mar-15
"apparel industry" AND "segmentation" AND "U.S"	Emerald Insight	4	28-Mar-15
"fashion preferences" AND "Hispanics"	Emerald Insight	0	30-Mar-15
"fashion preferences" AND "African American"	EBSCO Host	2	30-Mar-15
"fashion consumer profiling" AND "U.S."	EBSCO Host	238	30-Mar-15
"fashion consumer profiling" AND "U.S." AND "apparel"	EBSCO Host	7	30-Mar-15
"consumer segmentation" AND "fashion"	EBSCO Host	1	30-Mar-15
"clothing types" AND "U.S."	Google	77.800	25-Mar-15
"clothing types" AND "United States"	EBSCO Host	1	25-Mar-15
"clothing differences" + "Hispanics" + "African American"	EBSCO Host	0	30-Mar-15

"fashion consumer segmentation"	EBSCO Host	0	28-Mar-15
"fashion consumer classification"	EBSCO Host	0	28-Mar-15
"fashion segmentation" AND "U.S."	EBSCO Host	40	5-Apr-15
"fashion classification" AND "U.S."	Google Scholar	72	5-Apr-15
"lifestyle segmentation" AND "U.S"	EBSCO Host	9	5-Apr-15
"Apparel" AND "Hispanics"	Google Scholar	3520	25-Mar-15
"apparel" AND "African American"	Google Scholar	11.900	5-Apr-15
"clothing differences" AND "U.S."	Emerald Insight	0	5-Apr-15
"clothing types" AND "U.S"	EBSCO Host	49	5-Apr-15
"clothing types" AND "United States"	Google Scholar	485	5-Apr-15
"information seeking behavior" AND "Hispanics"	EBSCO Host	4	15-Apr-15
"information seeking behavior" AND "African American"	EBSCO Host	2	15-Apr-15
"market segmentation" AND "fashion industry"	EBSCO Host	15	15-Apr-15
"market segmentation" AND "apparel industry"	EBSCO Host	924	5-Apr-15
"consumer segmentation" AND "apparel industry" AND "United States"	EBSCO Host	7	5-Apr-15
"consumer segmentation" AND "fashion companies"	Google Scholar	317	5-Apr-15
"design preferences" AND "Hispanics"	Google Scholar	68	15-Apr-15
"design preferences" AND "African American"	Google Scholar	227	15-Apr-15
"fashion design preferences" AND "Hispanics"	Google Scholar	0	15-Apr-15

"fashion design preferences" AND "African American"	Google Scholar	0	15-Apr-15
"Styling profiles" AND "U.S"	Emerald Insight	0	15-Apr-15
"Favorite fashion brands" AND "Hispanics"	Google	9	15-Apr-15
"Favorite fashion brands" AND "African American"	Google	2600	15-Apr-15
"fashion segmentation"	EBSCO Host	13	28-Mar-15
"fashion classification"	EBSCO Host	18	28-Mar-15
"fashion segmentation" AND "U.S."	EBSCO Host	2	28-Mar-15
"American Women" AND "Clothing styles"	EBSCO Host	4	28-Mar-15
"Buying behavior" AND " apparel" AND " United States"	Emerald Insight	26	15-Apr-15
"Buying behavior" AND " apparel" AND "African American "	Emerald Insight	12	15-Apr-15
"Buying behavior" AND " apparel" AND " Hispanics"	Emerald Insight	13	15-Apr-15
"fashion design" AND "Hispanics"	Google Scholar	431	15-Apr-15
"fashion design" AND "African American"	Google Scholar	1530	15-Apr-15

Appendix B: Mosaic® USA – Group and Segment Listing

		% OF HOUSEHOLDS		
A	Power Elite 6.13%	A01	American Royalty	0.73%
		A02	Platinum Prosperity	1.43%
		A03	Kids and Cabernet	0.96%
		A04	Picture Perfect Families	1.10%
		A05	Couples with Clout	1.43%
		A06	Jet Set Urbanites	0.48%
B	Flourishing Families 4.42%	B07	Generational Soup	0.98%
		B08	Babies and Bliss	1.65%
		B09	Family Fun-tastic	1.22%
		B10	Asian Achievers	0.56%
C	Booming with Confidence 5.34%	C11	Aging of Aquarius	2.34%
		C12	Golf Carts and Gourmets	0.41%
		C13	Silver Sophisticates	0.97%
		C14	Boomers and Boomerangs	1.62%
D	Suburban Style 5.02%	D15	Sports Utility Families	1.77%
		D16	Settled in Suburbia	0.77%
		D17	Cul de Sac Diversity	1.03%
		D18	Souful Spenders	1.45%
E	Thriving Boomers 5.13%	E19	Full Pockets, Empty Nests	1.10%
		E20	No Place Like Home	1.50%
		E21	Unspoiled Splendor	2.52%
F	Promising Families 3.36%	F22	Fast Track Couples	1.59%
		F23	Families Matter Most	1.77%
G	Young, City Solos 2.01%	G24	Status Seeking Singles	1.29%
		G25	Urban Edge	0.72%
H	Middle-class Melting Pot 5.76%	H26	Progressive Potpourri	1.00%
		H27	Birkenstocks and Beemers	1.18%
		H28	Everyday Moderates	1.09%
		H29	Destination Recreation	2.49%
I	Family Union 5.40%	I30	Stockcards and State Parks	1.50%
		I31	Blue Collar Comfort	1.38%
		I32	Latin Flair	0.98%
		I33	Hispanic Harmony	1.55%
J	Autumn Years 5.64%	J34	Aging in Place	2.41%
		J35	Rural Escape	1.76%
		J36	Settled and Sensible	1.48%
K	Significant Singles 4.72%	K37	Wired for Success	1.00%
		K38	Gotham Blend	1.01%
		K39	Metro Fusion	1.01%
		K40	Bohemian Groove	1.92%
L	Blue Sky Boomers 6.11%	L41	Booming and Consuming	0.87%
		L42	Rooted Flower Power	2.33%
		L43	Homemade Happiness	2.91%
M	Families in Motion 3.58%	M44	Red, White and Bluegrass	2.11%
		M45	Diapers and Debit Cards	1.47%
N	Pastoral Pride 7.28%	N46	True Grit Americans	1.68%
		N47	Countrified Pragmatics	1.95%
		N48	Gospel and Grnts	1.81%
		N49	Work Hard, Pray Hard	1.84%
O	Singles and Starters 8.83%	O50	Full Steam Ahead	1.25%
		O51	Digital Dependents	2.99%
		O52	Urban Ambition	1.11%
		O53	Colleges and Cafes	0.41%
		O54	Striving Single Scene	1.29%
		O55	Family Troopers	1.78%

P	Cultural Connections 6.42%	P56	Rolling the Dice	1.69%
		P57	Meager Metro Means	0.62%
		P58	Fragile Families	0.73%
		P59	Nuevo Horizons	1.26%
		P60	Ciudad Strivers	1.12%
		P61	Humble Beginnings	0.96%
Q	Golden Year Guardians 7.25%	Q62	Reaping Rewards	1.30%
		Q63	Footloose and Family Free	0.50%
		Q64	Town Elders	3.76%
		Q65	Senior Discounts	1.61%
		R66	Dare to Dream	1.69%
R	Aspirational Fusion 2.92%	R67	Hope for Tomorrow	1.03%
		S68	Small Town Shallow Pockets	1.71%
S	Struggling Societies 4.69%	S69	Soul Survivors	1.32%
		S70	Enduring Hardships	0.96%
		S71	Hard Times	0.68%

Appendix C: Latina shopper profiles



- Love the adventure of shopping!
- But grocery shopping is, well... boring and a necessary evil.
- Prefer to see, touch & feel what they buy and DON'T usually shop online.
- Prefer in-language packaging & "Spanish" stores.
- Like to experiment with new products and visit a variety of stores.

ExploradorasSM
Culturally entrenched Latina shoppers.

Source: Latina Shopper Study 2010 Redbean Society and New American Dimensions.

DEMOGRAPHIC/ACCULTURATION PROFILE

- High number of homemakers
- Gen 1/least acculturated of 4 segments
- Mean age = 36.9 (slightly above overall mean of 35.2)
- Mean income = \$43.3K (below overall mean of \$49.1)

27%



PragmáticasSM
Latina Value-Seekers, identified.

Proactive & determined to act on their need to be frugal & price conscious. Their spending & relationship to brands is framed within the conservatism of the times.

- Likes to prepare, plan and strategize their shopping trips.
- Waits out for good deals and if it's not on sale, she just won't buy it!
- YES, they search for and use coupons & discount store cards.
- Aspire to overcome financially limited realities through hard work, savings & frugality.

Source: Latina Shopper Study 2010 Redbean Society and New American Dimension

DEMOGRAPHIC/ACCULTURATION PROFILE

- Gen 1/less acculturated
- Mean age = 36.9 (slightly above overall mean of 35.2)
- Mean income = \$44.6K (below overall mean of \$49.1)

23%

DigitalistasSM

A profile of digitally savvy Latina shoppers.

- *Want access to everything!*
- *Plan shopping trips & research products online*
- *Very educated about products*
- *Frequently compare prices online*
- *Balancing their Real & Virtual and Hispanic & American lives*
- *Goal and career oriented*
- *Focus on education as their path to success.*

DEMOGRAPHIC/ACCULTURATION PROFILE

- Fairly young (mean age = 34.0; somewhat below overall mean of 35.2)
 - Gen 3/highly acculturated*
 - Relatively high number from Caribbean (Puerto Rico, Dominican)
 - Mean income = \$51.9K (slightly above overall mean of \$49.1)
- *61% chose Spanish to respond to questionnaire.

31%

Source: Latina Shopper Study 2010 Redbean Society and New American Dimensions



- NOT value shoppers who often buy on impulse.
- Believe that national brands are superior to private label.
- Prefer one-stop shopping.
- Influenced by product displays and demos but not by circulars or coupons.
- Index high on use of American supermarkets.
- Navigate every aisle.

\$itasSM Young, affluent and HEAVY shopper

PRIMARY DEFINING QUALITIES

- Most acculturated, Youngest of 4 segments (mean age = 32.7; below overall mean of 35.2)
- Highest income (mean = \$57.8K; well above overall mean of \$49.1)
- Not value shoppers/price not primary motivator

20%

Source: Latina Shopper Study 2010 Redbean Society and New American Dimensions.