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ESCOLA BRASILEIRA DE ADMINISTRAÇÃO PÚBLICA E DE EMPRESAS
MESTRADO EXECUTIVO EM GESTÃO EMPRESARIAL**

**AN EXPLORATORY STUDY OF THE U.S. CONSUMER OF AFRICAN
FASHION**

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AN EXPLORATORY STUDY OF THE U.S. CONSUMER OF AFRICAN FASHION

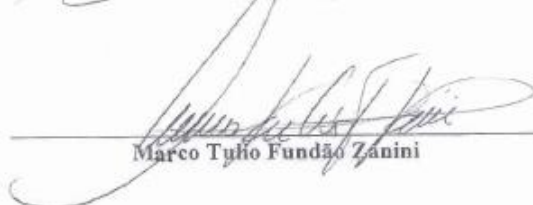
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ABSTRACT

This study explores the U.S. (United States) market for clothing and apparel of African origin and design; primarily focusing on the consumer of these fashion items. It delves into the field of Marketing study with an exploratory research approach to developing a consumer profile. By reviewing current market trends and analyzing results of survey data collected for the purpose of this study, it attempts to create an initial consumer profile using demographic and behavioral characteristics.

Attaining an understanding of the target consumer is a crucial factor in determining a market entry strategy for new businesses and can also provide already existing businesses with a road map to achieving their full potential. Knowing who is most likely to buy your product aids the business in crafting the most appealing brand story for their target demographic. It also provides an understanding of where they frequent and what sales channels might be most attractive. As such, the relevance of this study lies in its ability to provide a starting point of reference for African brands, designers and retailers looking to expand their reach in the U.S. market place.

Results of the study revealed a predominance of female buyers between the age of 30 to 35 years of age, living within the Mid-Atlantic region of the U.S. with buying patterns which indicated a preference for in-person shopping experiences versus online, and a tendency to purchase bargain items while seeking authenticity in the designs purchased, with a keenness towards supporting artisans on the continent. Further research into the subject matter is recommended, and should be aimed at achieving a more robust review of quantitative data as well as an expanded scope of qualitative research.

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Keywords: African Fashion, Apparel Market, Consumer Research, Buyer Trends, Consumer Profile, Customer Profile

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To the ones who listened, to the ones who were patient and to the ones who extended kindness and grace as I worked through this process, I would like to say thank you.

And to God I owe the greatest gratitude for getting me over the finish line.

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1. INTRODUCTION

1.1. GLOBAL LANDSCAPE OF FASHION – THE UNITED STATES AND AFRICA AS CONTRIBUTORS

Renowned fashion designer and entrepreneur Ralph Lauren, once stated that fashion is about something that comes from within you. What he was in essence saying is that fashion is a form of expression. It is a reflection of a society's culture, the times and the voice of its people. This definition speaks to the emotive elements of fashion. However, when speaking of the fashion industry we refer to the business end of fashion; the industry which deals with the design, production and distribution of clothing and apparel globally. According to McKinsey & Company's "The State of Fashion 2017" report, the industry was projected to attain a value of \$2.4 trillion in 2016. If compared to the GDPs of the world's economies, this would place it as the world's seventh largest economy¹. The report further projected a 2.5-3.5% growth in the industry in 2017. Africa however only accounts for a small portion of the pie. In an October 2016 article in African Business Magazine, Finbarr Toesland noted that the sub-Saharan African apparel and footwear market was valued at \$31 billion according to Euromonitor². Reflecting only a 1.3% stake in the global market for fashion.

The United States on the other hand can be considered a juggernaut in the global fashion market, with the apparel and footwear market valued at roughly \$358.88 billion in 2016 by Statista³. US brands such as Calvin Klein, Tommy Hilfiger and Ralph Lauren dominate the market for international fashion and have attained recognition in virtually all corners of the globe. Industry events such as New York Fashion Week and Los Angeles Fashion Week, draw international attendants and give wide exposure to brands seeking recognition on an international platform. Every fashion brand dreams of showcasing on these platforms, and that includes their African counterparts.

¹ Amed, Imran, Achim Berg, Leonie Brantberg, Saskia Hedrich, Johnattan Leon, and Robb Young. "The State of Fashion 2017." (n.d.): n. pag. Business Of Fashion. McKinsey & Company, 2016. Web. 20 Apr. 2017.

² Toesland, Finbarr. "Africa's Fashion Industry Comes of Age." African Business Magazine. N.p., 17 Oct. 2016. Web. 30 Apr. 2017.

³ "Apparel and Footwear: U.S. Market Value 2011-2016 | Statistic." Statista. N.p., n.d. Web. 30 Apr. 2017.

Although African fashion has always been considered interesting and viewed as exotic due to the characteristic use of vibrant colors, intricate patterns and unusual textiles, it had proven difficult in the past for Africa's home grown designers to break into the mainstream fashion market because the perception had often been that products from the world's poorest continent are of low quality or just not cool (Brook and Nyambura-Mwaura. 2015)⁴. However recent market trends have seen a shift in this ideology. With globally recognized fashion designers like Gucci, Versace and Kenzo, drawing inspiration from African fashion elements in their designs there has been a spotlight shined on the African fashion scene.

However, as noted by Tilahun Alemu (owner of internationally recognized Ethiopian shoe company soleRebels) in a recent Reuters article⁵, consumers now want products made by Africans and not replicas produced by Western clothing chains. Alemu believes that the global consumer today is hyper-aware and wants authentic and innovative ideas delivered from the authors of these African ideas. It would seem that U.S. consumer of African fashion agree with Alemu's sentiment as there has been a rise of indigenous African fashion brands gaining prominence and recognition on the US fashion scenes. Celebrities like Beyoncé and Michele Obama have been seen adorning designers like Maki Oh and Loza Maleombho. As can be expected, with the growing recognition of African brands on the international scene there has also been an increased number of brands attempting to gain entry into the US market. This of course has necessitated a better understanding of the US consumer as it pertains to the African fashion market.

⁴ Brock, Joe, and Helen Nyambura-Mwaura. "AFRICA BUSINESS-With African Fashion in Vogue, Home Talent Shines." Reuters. Thomson Reuters, 06 Feb. 2015. Web. 30 Apr. 2017.

⁵ Brock, Joe, and Helen Nyambura-Mwaura. "AFRICA BUSINESS-With African Fashion in Vogue, Home Talent Shines." Reuters. Thomson Reuters, 06 Feb. 2015. Web. 30 Apr. 2017.

1.2. RESEARCH OBJECTIVES AND RELEVANCE

This study is an exploratory research that should be considered a first step towards gaining an understanding of the US buyer of African fashion items with a core goal of understanding how African fashion is perceived by certain customers within the US market. We will explore themes of “why”, “where” and “how much” – which are all key dimensions necessary for developing a consumer profile, however further research is recommended to develop a definitive construct of the consumer profile.

Attaining an understanding of the target consumer is a crucial factor in determining a market entry strategy for new businesses and can also provide already existing businesses with a road map to achieving their full potential. Knowing who is most likely to buy your product aids the business in crafting the most appealing brand story for their target demographic. It also provides an understanding of where they frequent and what sales channels might be most attractive. As such, the relevance of this study lies in its ability to provide a starting point of reference for African brands, designers and retailers looking to expand their reach in the US market place.

1.3. RESEARCH STRUCTURE

This study is structured and presented in four parts initiated by an introduction to the global fashion landscape and the current position of Africa and the United States within that framework. Next is a theoretical and literary review which explores the concept of customer profiling. Third is a presentation of the research methodology used to capture data relevant to the study. This includes discussion around the scope and limitations of the study, chosen research methods and recommendations for further research into the topic. Following this is an analysis of the data captured within the study as well as a summary of findings based on the interpretation of the trends identified in the data set. Finally, a conclusion is drawn regarding the buyer profile of the US consumer of African fashion and potential uses of this data in developing a marketing plan or market entry strategy for an African fashion brand into the US market.

2. THEORETICAL REFERENCES & LITERARY REVIEW

2.1. DEFINITION OF A CUSTOMER/CONSUMER PROFILE

Consumer profiling, a subset of Marketing research, is a key element in the development of a successful marketing plan and or market entry strategy. In their 2001 article titled, *Knowledge Management and Data Mining for Marketing*, Michael Shaw and his co-authors define a customer profile as a model of the customer, based on which the marketer decides on the right strategies and tactics to meet the needs of that customer⁶. They also noted that while developing customer profiles a marketer is interested in the customer demographic details as well as the characteristics of the purchase transactions of the customer (Shaw et al.2001). In essence, customer profiling consists of analyzing the consumers of a product by reviewing demographic, psychographic and behavioral characteristics.

Experian in its 2014 White Paper titled *The Art of Customer Profiling*, further delves into customer profile theory by stating that grouping customers into segments enables brands to more effectively focus tailored marketing communications to specific types of customers, across its channels (Experian, 2014)⁷. They believe that customer profiling and the creation of distinct audience segments allow brands create campaigns tailored to each specific group. This could mean tailoring a message to a brand's most valuable customers base, attempting to attract customers similar to a brand's ideal customer or creating personalized campaigns for segments that might require a different communication strategy.

In today's highly digital world however, consumer profiling strategies can range from the incredibly complex to the most simplistic of approaches based on the size of the organization in question, it's level of maturity in the marketplace, the research tools readily available and the already existing market studies in their area of interest. In a Harvard Business Review article⁸, Richard Ting noted that although many companies are data rich, they continue to have missed opportunities to capitalize on this consumer data because most brands still do not have

⁶ Shaw, M. J., Subramaniam, C., Tan, G. W., & Welge, M. E. (2001). Knowledge management and data mining for marketing. Customer Profiling,

⁷ "The Art of Customer Profiling." White Paper (2014): n. pag. Experian. Web. 7 July 2017.

<<http://www.experian.co.uk/assets/marketing-services/white-papers/wp-the-art-of-customer-profiling.pdf>>

⁸ Ting, Richard. "The Customer Profile: Your Brand's Secret Weapon." Harvard Business Review. N.p., 07 Aug. 2014. Web. 7 July 2017. <<https://hbr.org/2013/03/the-customer-profile-your-bran>>.

a unified view of what their consumers are saying, doing or buying online, in retail and across social media. He suggests combining the various siloed views of data which brands collect into creating a 360-degree customer profile which would ultimately lead to enhanced consumer targeting and personalization. To that effect many companies are investing heavily in analytical tools such as social media CRM software or hiring consultants to help generate market segmentation data using tools such as MOSAIC or ACORN in order to achieve this goal. For the purposes of this study however we will be going back to the core elements of a consumer profile (as outlined in the upcoming section) and attempting to gather data which will help create a simplistic view of the U.S. consumer of African fashion that will be most impactful for new entrants into the marketplace who may have little or no access to any existing consumer information.

2.2. ELEMENTS OF A CUSTOMER PROFILE

According to Sprotles and Kendall, there exists three ways to profile consumer styles: the psychographic/lifestyle approach; the consumer typology approach and the consumer characteristics approach (Sprotles and Kendall, 1996)⁹. The three approaches mentioned here mirror the earlier text definition of capturing consumer characteristics through analysis of psychographics/behavioral and demographic traits.

Psychographic Analysis;

This involves gaining an understanding of the personality traits and lifestyle preferences of your customer such as buyer's habits, hobbies, spending habits and values (Meredith.2013)¹⁰

Demographic Analysis;

Where psychographic analysis attempts to explain the "why" of the buyer decision, demographics looks at the "who". It includes information such as gender, age, income, marital status etc. (Meredith.2013)¹¹

⁹ Sprotles, George B., and Elizabeth L. Kendall. "A Methodology for Profiling Consumers' Decision-Making Styles." Journal of Consumer Affairs. Blackwell Publishing Ltd,

¹⁰ Meredith, Alisa. "How to Use Psychographics in Your Marketing: A Beginner's Guide." HubSpot. N.p., 26 Dec. 2013. Web. 30 Apr. 2017.

¹¹ Meredith, Alisa. "How to Use Psychographics in Your Marketing: A Beginner's Guide." HubSpot. N.p., 26 Dec. 2013. Web. 30 Apr. 2017.

2.3. IMPORTANCE OF THE CUSTOMER/CONSUMER PROFILE

The importance of consumer profiling lies in its use in knowledge-based marketing and market entry decision making. Knowledge-based marketing, which uses appropriate data mining tools and knowledge management framework, helps in the creation of marketing strategies that target consumers based on their specific tastes and unique needs by leveraging the information stored in an organizations transactional and customer databases (Shaw et al.2001)¹². The importance of leveraging knowledge gained from the study of consumer behavior is further underscored in a March 2017 McKinsey and Company article in which Brown and his team, noted that current research data indicates that organizations that leverage customer behavioral insights outperform peers by 85% in sales growth and more than 25% in gross margin¹³. This potential for using consumer data to gain a competitive advantage in the marketplace, makes consumer data an incredible asset within any organization.

3. PRESENTATION OF RESEARCH METHODOLOGY

3.1. RESEARCH SCOPE, APPROACH AND LIMITATIONS

For the purpose of this study African fashion items are defined as clothing and apparel designed or produced by a person or persons of African origin. As previously discussed, the primary driver behind the study was the quest to gain a better understanding of the US consumer of these African fashion items. In doing this one would need to answer several questions, including; who is the consumer (e.g. age, gender, ethnicity, income level), where do they reside, where do they shop, what drives their buying decision and how much do they spend.

The first set of questions aimed at defining “who” the consumer is, are asked so as to capture demographic information necessary for the initial phase of the consumer profile. Per Shaw’s¹⁴

¹² Shaw, M. J., Subramaniam, C., Tan, G. W., & Welge, M. E. (2001). Knowledge management and data mining for marketing. Knowledge Based Marketing

¹³ Brad Brown, Kumar Kanagasabai, Prashant Pant, and Gonçalo Serpa Pinto. "Capturing Value from Your Customer Data." McKinsey & Company. N.p., n.d. Web. 7 July 2017.
<<http://www.mckinsey.com/business-functions/mckinsey-analytics/our-insights/capturing-value-from-your-customer-data>

¹⁴ Shaw, M. J., Subramaniam, C., Tan, G. W., & Welge, M. E. (2001). Knowledge management and data mining for marketing. Knowledge Based Marketing

definition of consumer profiling (outlined in the previous section) this is a relevant piece of the consumer profiling matrix.

The second set of questions go deeper into attaining an understating of the consumer by attempting to expose buying patterns and preferences which make up elements of the consumers psychographic data. This line of questioning aligns to the directives given by Susan MaGee in her article published by the Edward Lowe Foundation¹⁵. Here MaGee recommends asking questions related to;

- Reason/occasion for purchase
- Number of times they'll purchase
- Timetable of purchase, every week, month, quarter, etc.
- Amount of product/service purchased
- How long to make a decision to purchase
- Where customer purchases and/or uses product/service

In order to capture this information an online survey was crafted and the request for participation was shared through the social media channels (specifically Facebook and Instagram) of three organizations with followers who are known African fashion enthusiasts. These organizations were chosen for their large follower base (as outlined in the table below) and their notoriety for providing content through their social media platforms which is engaging and attractive to the target audience of this study. That is to say, an audience which consists of potential consumers of African fashion living in the U.S. who are in essence individuals with an interest in the African fashion scene based in the United States. It is worthy of note that social media was chosen as the means of circulating the survey requests due to its wide reach, ease of access and the continued growth of its user base.

¹⁵ MaGee, Susan. "How to Identify a Target Market and Prepare a Customer Profile." Edward Lowe Foundation. N.p., 24 July 2015. Web. 7 July 2017. <<http://edwardlowe.org/how-to-identify-a-target-market-and-prepare-a-customer-profile/>>.

The table below reflects a list of the social media handles used and descriptions of the organizations:

Organization	Description	Social Media Platform	Social Media Handle	# of Followers
Osengwa	Online retail platform for apparel and home décor created by African artists	Instagram	@osengwa	15.8K
		Facebook	https://www.facebook.com/osengwa/	1,180
Distinctly Creative	An art collective whose mission is to give a diverse, holistic, and collaborative representation of the creative scene through social and professional development opportunities	Instagram	@distinctlycreative	4,091
		Facebook	https://www.facebook.com/distinctlycreative/	165
Continent Creative	Producer and marketer of upscale African fashion, art and lifestyle events such as Africa Fashion Week LA and AFWLA Talks	Instagram	@continentcreative	7,569
		Facebook	https://www.facebook.com/continentcreative/	2861
		Instagram	@afwla	1,102
		Facebook	https://www.facebook.com/AfricaFashionWeekLA/	14,461

Survey responses were collected during a one week period in the month of April. Due to the time constraints during data collection survey response rates were low. A total of 80 responses were received from participants across all platforms. 16 of these responses were from non-US residents and as such were excluded from the study leaving a total 64 responses for review within the study. Note that survey data was captured anonymously and as such individual responses may not be tied back to the original social media handle of reference. Due to the relatively small sample size achieved the research methodology took on the form of an exploratory one with the intention of capturing minor quantitative data (such as the parameters around age, gender, ethnicity, income level and amount of spending) and

qualitative data gathered through open-ended questions targeted at uncovering reasons for spending, location for spending and preference for shopping sites.

Bearing in mind that exploratory research studies, as noted by Vergara¹⁶, are characterized by flexibility and versatility with respect to methods and are most appropriate when there is little accumulated and systemized knowledge, the results from this study are not considered definitive or expected to represent a complete reflection of the entire population of US consumers. Nevertheless, it is assumed to be directionally accurate and helpful in gaining an initial understanding of the who, when and why of US consumer spending on African fashion.

3.2. SURVEY QUESTIONS

Survey questions were grouped into 6 sections with both open-ended and multiple-choice questions. A dependency model was adopted in the survey creation so that specific answers given in one section dictated the next section to which a participant was directed. In the opening section participants were asked to identify if they currently lived within the United States. If the response to the question was no, they were then directed to section 2 for Non – US participants which requested their current country of residence and state. Other participations who answered yes to the initial question were instead directed to section 3 which contained questions geared at capturing demographic information. At the end of Section 3 participants were asked if they had purchased any African clothing or apparel items in the last 12 months. If their response was yes they were directed to section 4 which contained questions around spending patterns on the purchased goods. If the answer was no, they were directed to section 5 which had one question inquiring as to their reason for not purchasing such items. Upon completion of either section 4 or 5 participants were directed to the final section 6 which contained primarily open-ended questions geared at capturing consumer behavior trends such as preference for online versus instore shopping and identifying brand awareness. Please see the appendix for screenshots of the actual survey as well as a link to access the online survey.

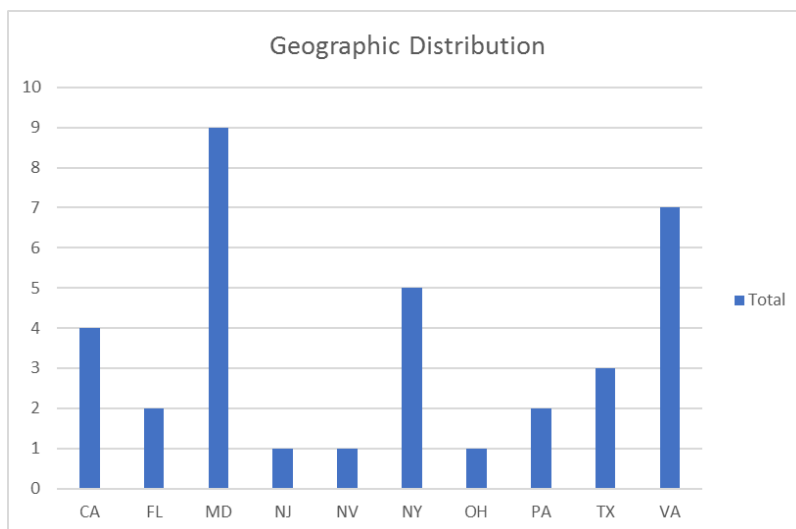
¹⁶ Vergara, S.C. Research Projects and Reports in Administration. 3rd edition. Sao Paulo. Editorial Atlas, 2000

4. DATA ANALYSIS

4.1. DEMOGRAPHIC CHARACTERISTICS

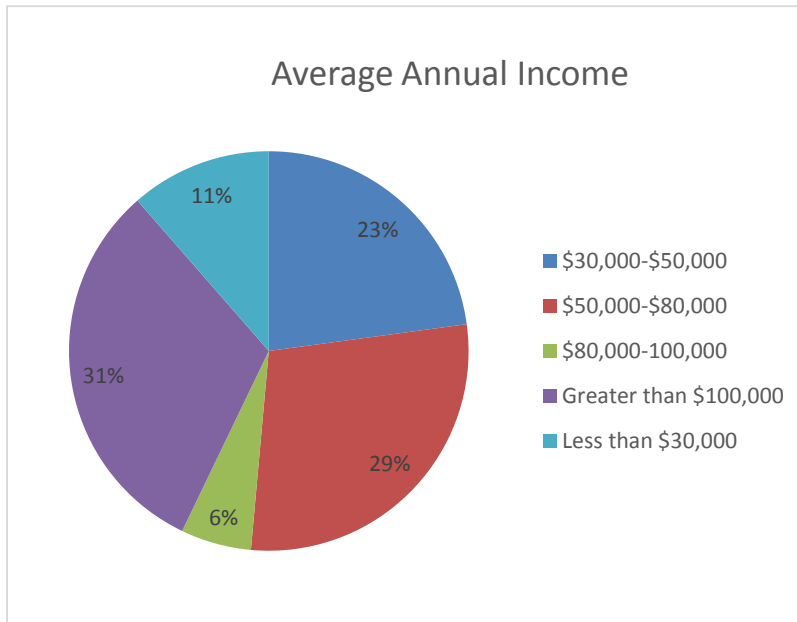
Results of the online survey conducted are as follows; 80 survey responses were received with 64 participants based in the United States. 35 of the 64 participants answered yes to the question – “In the past 12 months have you purchased any clothing items designed or produced by a person or persons of African origin.” From this we can infer that 55% of the US based research participants were active consumers of African clothing and apparel. Further analysis of this sub-segment of participants (i.e. the 35 identified active US based consumers of African fashion items) revealed the following;

Geographic Distribution:



Participants were primarily located in the Mid-Atlantic states with 9 participants residing in Maryland, 7 in Virginia, 5 in New York, 2 in Pennsylvania and 1 in New Jersey, accounting for a total 24 of the 35 US based participants.

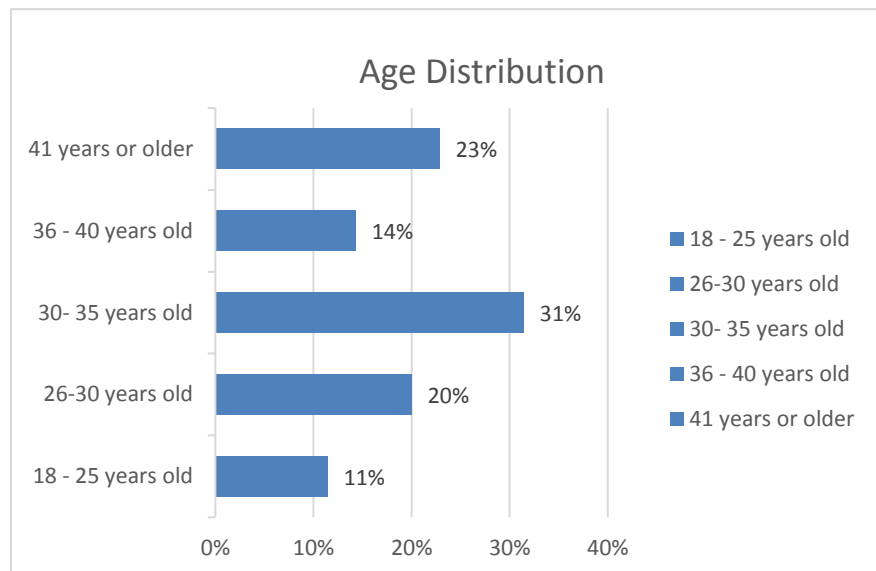
Annual Income:



31% of respondents indicated that they earned an average annual income greater than \$100,000. The second largest categorization was the \$50-\$80,000 range with 29% of responses and the third was the \$30-\$50,000 range with 23% of responses.

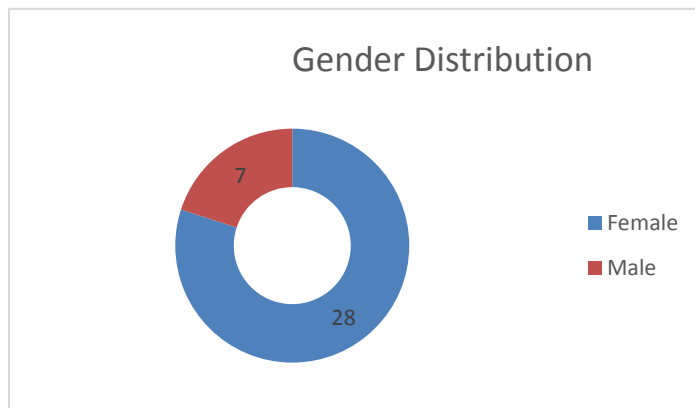
Age Distribution:

Respondents were grouped into 5 age categories based on their responses. The largest group was the 30-35 years old bracket which had 31% of responses while the 41 years and above bracket represented 23% of participants and



respondents aged between 26 – 30 years made up 20% of the responses.

Gender:



28 of the participating active US based consumers identified as female while 7 of the participants identified as male, skewing the results primarily towards the female buyers' perspective.

Ethnicity:

For purposes of this study, the researcher was interested in not only identifying racial backgrounds of the consumer profile but in also exploring any preexisting connections that the participants may have had to the African continent. In order to capture this, participants were asked to select from the 4 options below, the option that most accurately described them;

- A. I am African American or Black
- B. I am an African living in the diaspora
- C. I am of African descent or have African parents/grand parents
- D. I am of Non-African heritage or other racial background

Survey results indicated that 46% of respondents selected option A, 43% selected option B and only 6% option C and the final 6% identified with option D. This would indicate that 94% of the identified active US consumers of African fashion were black. We can also infer that African American buyers (option A) and African immigrant buyers (option B) make up the largest portions of that consumer base.

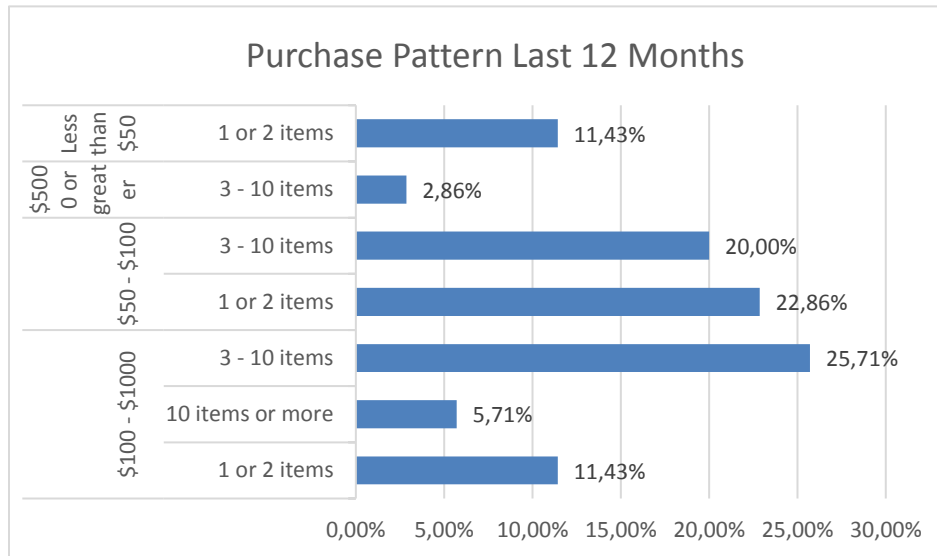
Summary Demographics

By summarizing the above demographic results, an initial picture begins to form about the surveyed active consumers of African fashion items. The results show that the primary consumer can be characterized as a black female, between the age of 30 -35 years old, earning an average annual income greater than \$100,000 and residing in the Mid-Atlantic region of the country.

4.2. BUYING PATTERNS

Spending Patterns;

In order to explore potential buying patterns of consumers, survey participants who identified as having actively made purchases of African fashion items in the last 12 months were asked the amount of dollars spent and the number of articles purchased. The following table summarizes these responses;



Survey responses, as noted above, indicated that 26% of consumers spent between \$100 - \$1000 in purchasing 3 to 10 items while 23% spent \$50 - \$100 in purchasing 1 or 2 items and another

20% spent \$50 - \$100 purchasing 3 to 10 items. Only 3% of respondents reported spending \$5000 or greater and indicated purchasing between 3 to 10 items. These results indicate that consumers spending is primarily geared towards bargain buys and affordable fashion items with very few dollars going towards luxury items.

Shopping Channels;

When asked if items were purchased online versus in person, 57% of respondents indicated making purchases in person while 43% indicated having shopped online. Participants were also asked if they had attended any pop-up shops or trunk show events, and if purchases were made at these events. 43% of respondents indicated yes to having attended and making purchases while 20% indicated having attended without making purchases and 37% indicated not having attended any such events.

4.3. REASONS FOR BUYING

In section 6 of the survey, participants were asked to choose from the following 5 options, which one they considered the primary driver for making their buying decision;

- A. I just love the prints/and or designs
- B. I want to connect with the continents and my roots
- C. Knowing I am supporting artists form the continent
- D. Knowing I am contributing to a charitable cause
- E. Quality of the goods

Survey results indicated that 29% of participants selected option A, 17% option B, 26% option C, 26% option E and the final 3% option D. This indicates that an attraction to the vibrancy of the colors and patterns which characterize the elements of African fashion is a key factor in the buying decision of the consumers. Consumers are also keen on supporting artisans on the continent and believe that goods produced are of a high quality.

4.4. REASONS FOR NOT BUYING

As previously noted, 29 of the 64 US based participants indicated that they had not shopped any African fashion items in the last 12 months. Given the options to choose from 4 potential reasons for not buying items of African fashion, 62% of participants responded that they did not know where to shop for the items. This indicates that although there is a desire to make the purchase, a general lack of awareness of retail locations can be seen as the key driver for participants' inability to shop the desired goods. 17% of participants however indicated although they were aware of retail locations carrying African brands, that they could not find any items that they desired. The remaining 20% of survey results were split between responses indicating that the quality of the goods were poor or undesirable and that items were too expensive.

4.5. BRAND AWARENESS

In order to determine brand awareness and capture potential shopping sites of the consumer, survey participants were asked to list 3 brands they had either shopped or desired to shop and

3 retail outlets carrying African brands that they were familiar with. Below are the identified brands and retail platforms:

African Fashion Brands	Retail Platforms Carrying African Fashion
Orange Culture, Maki Oh, Lisa Folawiyo, Duro Olowu, Thula Sindi, Laduma Ngxokolo, Ozwald Boateng, Natasha Baco, The Piper Twins, Onyii & Co, Obioma Fashion, Midget Giraffe, Thandos, The Foreign Closet, The Wrap Life, D'Iyanu, Simply Cecil, Brian Americus, Grass Fields, Indego Africa, Eden Diodati, Christie Brown, Deola Sagoe, Jewel by Lisa, Tsemaye Binitie, Ituen Basi, Kinam	Osengwa, Zuvaa, Etsy, Kutula, Ankara Bazaar, WeBuyBlack, Ten Thousand Villages, Shop Maju, KISUA, Mammaw, ASOS, Afrikea, Amazon

4.6. SUMMARY OF FINDINGS AND RESEARCH CONCLUSION

Demographic results of the study indicate that the most likely consumer of African fashion items is the black female, between the age of 30 -35 years old, earning an average annual income greater than \$100,000 and residing in the Mid-Atlantic region of the country. In reviewing consumer spending patterns, we were also able to determine that consumer spending is primarily geared towards bargain buys and affordable fashion items with very few dollars going towards luxury items. Based on survey response we identified a preference for in-person buys versus online shopping with consumers not only making instore purchases but also frequenting roving sales events such as pop-up shops and trunk shows in order to access the desired goods. Survey results around the reasons for consumer spending indicated an attraction to the vibrancy of the colors and patterns which characterize the elements of African fashion as a key factor in the buying decision of the consumer. Results also confirmed that consumers are actively seeking authentic goods produced and designed by African brands with a keenness towards supporting artisans on the continent. However, we also identified that although there is active demand for the goods, potential customers are lost due to a lack of awareness of shopping channels and avenues for purchasing desired goods.

Analysts and researchers continue to predict growth in the global fashion industry and Africa is poised to take its rightful place in this burgeoning marketplace with an increased demand for quality goods produced by authentic African artisans. Although in recent times there has been extensive media coverage of the growing popularity of African fashion trends in the U.S market, there is still little to no academic research regarding this growing consumer base. As such the results presented in this study, although preliminary in nature, are relevant and timely in starting the conversation regarding the demographic characteristics and buying trends of these consumers. This study's main contribution to this discussion is that it provides an initial understanding of the consumer profile for U.S. buyers of African fashion items and thus allows a brand to better prepare itself for competition in this marketplace. African brands looking to expand their reach in the U.S. market can leverage these results identified in this study in crafting a brand story that is not only appealing to the target demographic but can be represented through marketing channels that are frequented by their desired buyer.

4.7. RECOMMENDATIONS FOR FUTURE RESEARCH

It is recommended that further study be conducted into the subject matter of US consumer spending on African fashion. In doing this, future researchers may be interested in engaging in a more in-depth review of quantitative data as well as expanding the scope of qualitative research conducted. Efforts should be made to attain a significantly larger sample size to improve data accuracy and allow for proper statistical analysis. In regards to qualitative elements of the research, more detailed questions can be asked around timing of spend and a closer look should be paid to differentiating between in-store, pop up shops/events and online purchases. In addition to conducting consumer surveys/interviews, researchers may also consider interviewing other market participants such as retailers and designers. By expanding the research scope in this manner, a more robust picture of spending patterns and reasons for buying decisions may be derived. The increase in sample size will also lead to higher accuracy in statistical analysis performed as well as a deeper understanding of consumer demographics such as the potential ability to identify clusters of geographic spending and generational implications on buying channels and amount of spend.

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6. APPENDIX

6.1. RESEARCH TOOLS - ONLINE SURVEY

To access the live online survey please use the link below:

<https://goo.gl/forms/43yDAmGp1vFcbK4y2>

Screenshots of Survey Sections and Questions are presented below:

The screenshot displays a Google Forms interface for a survey titled "African Fashion & Your Thoughts". At the top, there are tabs for "QUESTIONS" and "RESPONSES" (showing 80 responses). The current section is labeled "Section 1 of 6". The survey content includes a thank you message, a description of the survey's purpose (to understand the consumer market for African Fashion in the US), a confidentiality statement, and a definition of African fashion items. The first question is "Do you live in the United States?", which is a required question (indicated by a red star) with two radio button options: "YES" and "NO". At the bottom, there is a navigation bar with the text "After section 1" and a button labeled "Continue to next section".

QUESTIONS RESPONSES 80

Section 1 of 6

African Fashion & Your Thoughts

Thank you so very much for taking the time to help me with my research.

This survey is intended to help gain a better understanding of the consumer market for African Fashion, especially within the United States. The survey should take about 10 mins to complete. Survey responses are confidential and respondent information shall remain anonymous. Please note your participation in this survey is voluntary and by completing the questions below you consent to the use of your responses as deemed necessary by the creator of the survey.

For purposes of this survey African fashion items are defined as clothing and apparel items designed or produced by a person or persons of African origin.

First let's get to know you a little better; remember all answers are anonymous and solely for the use of market research and analysis so please feel free to be as honest and descriptive as possible with your responses;

Do you live in the United States?

☐ YES

☐ NO

After section 1 Continue to next section

Section 2 of 6

Non - US Participants

Thank you again for taking a second to help us out. However at this time we are most curious about our US based friends. In the meantime let us know where you're based so we can keep you in our thoughts as we research more places to expand our reach to. You may continue on with the survey but please disregard all references to \$ amounts and answer questions based on your home currency.

What country do you currently reside in? *

Short answer text

After section 2
Continue to next section

Section 3 of 6

US Participants

Description (optional)

What state do you live in? *

Short answer text

What city do you live in? *

Short answer text

On average how much do you earn annually? *

☐ Less than \$30,000
☐ \$30,000-\$50,000
☐ \$50,000-\$80,000
☐ \$80,000-100,000
☐ Greater than \$100,000

How old are you? *

☐ 17 years or younger
☐ 18 - 25 years old
☐ 26-30 years old
☐ 30- 35 years old
☐ 36 - 40 years old
☐ 41 years or older

Are you male or female? *

☐ Male
☐ Female

Please select a category below that best describes you - *

☐ I am an African living in the diaspora
☐ I am of African descent or have African parents/grand parents
☐ I am African American or Black
☐ Non-African heritage or other racial background

Now that we know a little about your roots let's get to know a bit more about your spending patterns -

Description (optional)

In the last 12 months have you purchased any clothing items designed or produced by a person or persons of African origin? *

☐ YES
☐ NO

Section 4 of 6

Yes , you shop African Fashion

Description (optional)

How much did you spend on your last purchase? *

☐ Less than \$50
☐ \$50 - \$100
☐ \$100 - \$1000
☐ \$1000 - \$5000
☐ \$5000 or greater

How many articles of clothing did you buy? *

☐ 1 or 2 items
☐ 3 - 10 items
☐ 10 items or more

How much, in total, would you estimate you have spent on such items in the past 12 months? *

☐ Less than \$50
☐ \$50 - \$100
☐ \$100 - \$1000
☐ \$1000 - \$5000
☐ \$5000 or greater

How many such articles of clothing, in total, would you estimate that you have purchased in the last 12 months? *

☐ 1 or 2 items
☐ 3 - 10 items
☐ 10 items or more

Did you purchase any of these items online?

☐ YES
☐ NO

Section 5 of 6

No, you have not shopped African fashion

Description (optional)

If you have not purchased any clothing items designed or produced by a person or persons of African origin, which of these would you say best describes your reason?

☐ I could not find anything that I liked
☐ I did not know where to shop for what I wanted
☐ Items were too expensive
☐ Quality of the goods were poor or undesirable

After section 5
Continue to next section

Section 6 of 6

Where do you shop?

Description (optional)

In general, do you prefer to shop for clothing online or in-person? *

☐ Online
 ☐ In person

Have you ever attended a "Pop-Up Shop" or "Trunk Show"? *

☐ YES
 ☐ NO

Did you purchase items at the event? *

☐ YES
 ☐ NO

What would you say is most likely to drive your decision to buy African fashion items? *

☐ Knowing I am supporting artists from the continent
 ☐ Knowing I may be contributing to a charitable cause
 ☐ I want to connect with the continent and my roots
 ☐ I just love the prints and/or designs
 ☐ Quality of the goods

What would you say you find most attractive/appealing about African fashion?

Long answer text

Please list 3 African designers you have shopped clothing pieces from in the last 12 months

Long answer text

Please list 3 African designers you would like to shop pieces from if you had access to their clothes

Long answer text

Please list 3 retailers you are aware of that carry/sell African fashion items

Long answer text