

**CONSUMER PERCEPTION, ATTITUDE AND PATRONAGE TOWARDS
PURCHASE OF IMPORTED VERSUS LOCALLY-PRODUCED APPAREL IN
NAIROBI COUNTY, KENYA**

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DECLARATION

This thesis is my original work and has not been presented for a degree in any other University

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DEDICATION

This thesis is dedicated to my parents Mr. and Mrs. James Nyarunda, who taught me that the best kind of knowledge to have is that which is learned for its own sake and the largest task can be accomplished if it is done one step at a time.

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OPERATIONAL DEFINITIONS OF TERMS

In the context of this study, the following terms were used as follows:

Apparel: Different types of clothes that are made from textiles. The term as used in the study, referred to all types of clothes, both undergarments and outerwear.

Attitude: A hypothetical construct that represents an individual's like or dislike for an item. Attitudes represent positive, negative or neutral feelings of the consumer.

Consumers: Users of textile products or services mainly for personal use. In this study, the term refers to employees of the central government of Kenya in Nairobi County, aged 25 years and above.

Ethnocentrism: the view of things in which one's group is the center of everything, and others are scaled and rated with reference to it. The term referred to the views that consumers had with regards to imported apparel.

Imported Apparel: Clothes that have been brought into the country from other countries. The term referred to all clothes that were imported from other countries for sale to the public in Kenya

Locally-produced Apparel: Clothes manufactured within a country. In this study, the term referred to clothes that have been manufactured in Kenya using either local or imported materials.

Patronage: The strong feeling of attachment and loyalty to one's own country without corresponding hostility towards other nations. This term referred to the support and encouragement that a consumer showed to apparel produced locally.

Perception: The immediate or intuitive appreciation of aesthetic qualities of an item. Perception, as used in this study, was the positive, negative or neutral feelings of the consumers in relation to the apparel purchased.

Professional: Refers to a person who is paid to undertake a specialized set of tasks by virtue of having completed a required course of studies and/or practice and whose competence can usually be measured against an established set of standards. In this study the term referred to employees of the central government of Kenya in Nairobi County in various ministries.

Public Servants: Employees of the central government of Kenya. These were persons employed by the public service commission of Kenya aged 25 years and above from various ministries.

ABBREVIATIONS AND ACRONYMS

ANOVA	Analysis of Variance
CBK	Central Bank of Kenya
CC	Conspicuous Consumption
CE	Consumer Ethnocentrism
CETSCALE	Consumer Ethnocentric Tendencies Scale
COO	Country of Origin
GOK	Government of Kenya
NCIC	National Cohesion and Integration Commission
PSC	Public Service Commission
SPSS	Statistical Package for Social Sciences
PPS	Probability proportional to Size

ABSTRACT

The purpose of this study was to analyze consumer perceptions, attitude and patronage towards purchasing locally-produced versus imported apparel among public servants in Kenya. The objectives of the Study were: to establish the attributes that professionals consider in selecting apparel; to determine the perception of public servants towards locally-produced and imported apparel; to establish the factors that influence the perception, preference and attitude of public servants towards locally-produced and imported apparel; and to establish the level of patronage of public servants in Nairobi on purchase of apparel products. The study adopted a survey design which was conducted within Nairobi County. A questionnaire was used to collect the primary data. The study targeted employees of the Central Government aged 25 years and above. The sampling procedure that was utilized was proportionate stratified multi-stage random sampling. From a population of 2000 employees, a sample size of 322 respondents was selected. The collected data was analyzed using statistical package for social science 17.0. Based on the findings of the study, it is clear that there is no variation in the attributes that consumers in Kenya consider when selecting apparel. The study findings also concluded that there is no significant difference in the perception of consumers in Kenya towards locally-produced and imported apparel. According to the findings both locally produced apparel and imported clothing are perceived in more or less the same standards. The findings showed that consumer attitudes toward locally-produced versus foreign apparel differed significantly. Consumers had an overall more positive attitude towards foreign apparel over Kenyan made apparel with regard to durability, quality, attractiveness, fashionableness, brand name, and choice of styles. However, no significant difference was found in consumer attitudes among various demographics, namely gender, age, income level and purchase frequency. Kenyan consumers preferred apparel originating in Eastern countries more than Western countries. Their three most preferred country of origin of apparel were Japan, America and China/Kenya, respectively. Interestingly, relative to other apparel attributes, a product's country of origin was generally of low importance in consumer decision-making. For consumer ethnocentrism, the results indicated that there was a positive correlation between consumer ethnocentrism and attitude towards locally-produced apparel, but there was no negative correlation between consumer ethnocentrism and attitude towards foreign apparel. Furthermore, demographic variables did not show effects on consumer ethnocentrism. From the study, the following recommendations were made: quality and durability of apparel should be improved to satisfy local demand and preferences, there is need for product differentiation, promotion of the native image and manufacturers should embark on an elaborate strength, weakness, opportunities and threats (SWOT) analysis programme to enable them to deal with competition from imports.

CHAPTER ONE: INTRODUCTION

1.1 Background to the Study

Vision 2030, Kenya's blueprint for development, stipulates that Kenya will aspire to be a middle income country by the year 2030 (GOK, 2008). Consequently, it envisions the prospects for the country in boosting its economic pillar through trade and industry. Kenya, as a third world country, needs to produce its own goods for sustainable economic and social growth. Globalization has catalyzed the growth of apparel industry and the marketplace attractions have driven the cultural preferences of consumers significantly across various segments. According to Cleveland and Laroche (2007), shifts in the cultural values, consumer preferences and purchasing intentions towards designer products are arguably the most critical issues faced by the marketing managers today. Customer centric market strategy, developed on self-esteem attributes of consumer is used by firms to enhance purchase intentions towards fashion apparel (Horowitz, 2009, Jansson & Power, 2010).

Kenya's domestic textile and apparel industry has existed since the early 1900s and it was the leading manufacturing industry until the 1980s, though this changed considerably during the 1990s. The country was plagued with large scale under capacity resource utilization in terms of manufacturing (GOK, 1999). Marketing implications of the above scenario have been the irregular supply of products, supply of low quality products, fluctuating prices due to product shortages, low reputation of manufactured goods, low motivation towards advertising, low marketing orientation and a general consumer discontent with home made goods (Kibua & Nzioki, 2004).

The textile and apparel industry in Kenya showed signs of early industrialization, since it is a very labor-intensive sector (Engvall, 2008). Presently the near-collapse of the industry shows a reality where cheap imports and second hand trade has significantly reduced competitiveness of the domestic fashion industry in the business environment in Kenya, (Fukunishi, 2009). The report “What do you wear? – Kenya in Second Hand” (Hall & Persson, 2006), describes the correlation between the second hand trade and the lack of domestic fashion. The few Kenyan fashion brands that exist contend to survive since they cannot compete with the cheap imports and second hand clothes. This study shows that the domestic fashion industry in Kenya fails to communicate the value of the Kenyan design to the consumers, and raises questions on how to raise the interest and crave for Kenyan fashion amongst the population (Hall & Persson, 2006).

Another study that relates to the problem discussed is “The impact of the second-hand clothing trade on developing countries” by Baden and Barber (2005). The study argues that the second hand trade has caused people in developing countries not to buy domestic fashion. Further, the authors state that almost all socio-economic groups are choosing to purchase second hand and consumption patterns have changed from locally customized goods to foreign imported goods. According to Hume (2009) local fashion companies have increased in Kenya, and it is imperative to think long-term since a thriving textile industry can change many lives.

Accordingly, there is a growing need for marketing practitioners to understand the dynamics that affect consumers’ evaluation of imported over locally-produced apparel in cross-national and cross-cultural settings (Bhaskaran & Sukumaran, 2007). As the Kenyan society transforms and becomes sophisticated and globalized, consumers are taking

advantage of this affluence and the latest fashion design services that technology and business can offer (Achumba, 1998). The present study focused on the Kenyan apparel industry to determine consumer perception, attitude and patronage in the choice of apparel. The choice of this subject has been necessitated by the dominance of '*made in,*' perception regarding imported products in comparison with the locally-produced apparel, leading to some local items being labeled as imported (Edwinsson & Nilson, 2009 & Otieno 1990). Despite this background, no study has been conducted to determine consumer perception, attitude and patronage towards domestic versus imported apparel in Kenya.

1.2 Statement of the Problem

The rapid pace of globalization in the business environment has created sophistication and a wide variety of choices in design and fabric. Consumers now have a wide variety of choices to make regarding their clothing. As a commercial hub in Eastern Africa, Kenya has emerged as a fertile marketing ground for foreign-made products, increasingly tilting the balance of trade in favor of imports (Maseke, 2011). According to the Central Bank of Kenya records between January and September 2010, Kenya's exports totaled to Kenya Shillings 395.6 billion, compared to Kenya Shillings 926.4 billion in imports (CBK, 2011). These figures indicate an unfavorable balance of trade of which include textile products. The preference for foreign made products including apparel has impacted negatively and continues to influence consumer attitude, perception and patronage in Kenya.

The Kenya apparel industry experienced drastic ups and downs after trade liberalization in the late 1990s. An upsurge in imports adversely hit the Kenyan apparel industry which was reduced by half in terms of real production. This downward trend altered due to the rapid growth of exports after the year 2000 which did not benefit local firms due to Imports from

developing countries, in particular Asia and secondhand products from industrial countries (Fakanishi & Takahiro, 2009). For the last decade, Kenyan firms have been competing with firms in developing countries rather than those in industrial countries (Fukunishi, 2012). The upsurge of imported apparel has negatively affected the apparel sector in Kenya leading to loss of market for locally produced apparel.

Though trade has been identified as a key driver of industrialization and anchored in the vision 2030, most of Kenyan goods are semi-processed, less diversified and concentrated in few markets (Fukunish & Takahiro, 2009). Accordingly, the textile and apparel industry in Kenya has moved to a condition of near collapse with massive job losses, low output and low sales due to loss of market. It is worth noting that the textile and apparel sector is critical for Kenya's development (GOK, 2008). The present study sought to analyze the consumer perception, attitude and patronage towards imported and locally-produced apparel in Kenya. The results showed that in order to fulfill the vision 2030, Kenya's blueprint for development, the apparel industry needs to be boosted. Kenya, as a third world country, needs to produce its own goods for sustainable economic and social growth.

1.3 Purpose of the Study

It is relevant to observe how the globalization of business environment has transformed the behaviour of consumers across nations and cultures because this can provide useful insights into marketing strategies in global economies. The purpose of this study was to analyze consumer perception, attitude and patronage towards the purchase of locally-produced and imported apparel among public servants in Kenya. This will provide insights into the characteristics of the Kenyan apparel consumers to help in marketing strategies to fulfill Kenya's vision 2030.

1.4 Objectives of the Study

The study was guided by the following objectives:

- i. To establish the attributes that Kenyan professionals consider in selecting apparel.
- ii. To determine the perception of public servants in Kenya towards locally-produced and imported apparel.
- iii. To establish the factors that influence perception, preference and attitude of these public servants towards locally-produced and imported apparel.
- iv. To establish the effect of level of patronage on the purchase of either locally produced or imported apparel in Kenya

1.5 Research Hypotheses

The following hypotheses were tested:

- Ho₁. There is no variation in the attributes that apparel consumers in Kenya consider when selecting apparel.
- Ho₂. There is no significant difference in the perception of apparel consumers in Kenya towards locally-produced and imported apparel,
- Ho₃. There is no significant difference in the factors that influence perception, preference and attitude of apparel consumers in Kenya in relation to apparel purchased.
- Ho₄. Consumer patronage has no significant effect on the purchase of either locally-produced or imported apparel in Kenya.

1.6 Significance of the Study

This study will specifically benefit the domestic and foreign manufacturers, marketers, exporters and other channel intermediaries doing or wishing to do business in developing countries. It will have implications for developing country governments such as Kenya and policy makers who seek to establish domestic manufacturing competency in the face of relentless competition from established foreign brands. The study will also contribute to the growing body of literature related to consumer perception, attitude and patronage towards purchase of domestic and imported apparel in Kenya and Africa as a whole. The analysis will inform the players in the apparel sub sector to better understand some of the factors that contribute to preferences of some apparel and hence make decisions that can contribute to the growth of their businesses.

1.7 Scope of the Study

The study focused on consumer perceptions, attitude and patronage in relation to domestic and imported apparel products. It focused only on employees of the central government from 18 government ministries within Nairobi County. Information on the number of employees was obtained from the Ministry of State for Public Service. This information formed the sampling frame for obtaining the required sample size.

1.8 Limitations of the Study

The study faced several challenges especially in collecting the data. One was the fact that most respondents had the opinion that the researcher was bound to benefit financially. This was overcome by clearly explaining the core objectives of the study. The other major limitation was the unwillingness of the respondents to give comprehensive information about their operations for fear of government reprisal. The respondents were asked to give

only the information they felt comfortable to divulge. They were also assured of anonymity in the introductory letter before completing the questionnaire. (Appendix A)

The sample was selected from Nairobi County in Kenya. Thus, this would limit the generalizability of the results to the whole country since the respondents were from one region. This study involved public servants as a sample and the respondents were treated as representatives of the general population. The sample was therefore skewed towards this group and cannot be considered as representative of the heterogeneous population of Kenya.

Finally, the findings can only be generalized amongst the product category assessed, i.e. apparel. In other product categories (e.g. footwear & accessories) findings might vary and generalization can only be done with caution.

1.9 Assumptions of the Study

The study made the following assumptions:

- i. The respondents completed the questionnaires honestly.
- ii. The respondents engaged in the actual selection and purchase of both domestic and imported apparel products.
- iii. The respondents were knowledgeable about the quality attributes of apparel products.
- iv. The respondents were knowledgeable about the difference between locally-produced and imported apparel products.

1.10 Conceptual Framework

The model used in this study was adopted from the Social Cognitive Theory developed by psychologist Bandura. It explains how people acquire and maintain behavioral patterns (Bandura, 2001). According to the theory, behavioral change depends on three factors namely: environment, people and behavior which are constantly influencing each other (Glanz, Rimer and Lewis, 2002). When purchasing apparel, social influences, achievement outcomes and self influences are constantly interacting forces in our behaviors. According to Glanz *et al.*, personal factors of the consumer in terms of cognition (workmanship and fabric quality), affective (style, design and fashion ability) and personal beliefs usually influence purchasing intentions and choices. Perception, attitude and patronage affect consumers' behavior socially and physically. Consumers make decisions on what they perceive. This forms an attitude after which, they may patronize, depending on their needs.

Independent variables

dependent variable

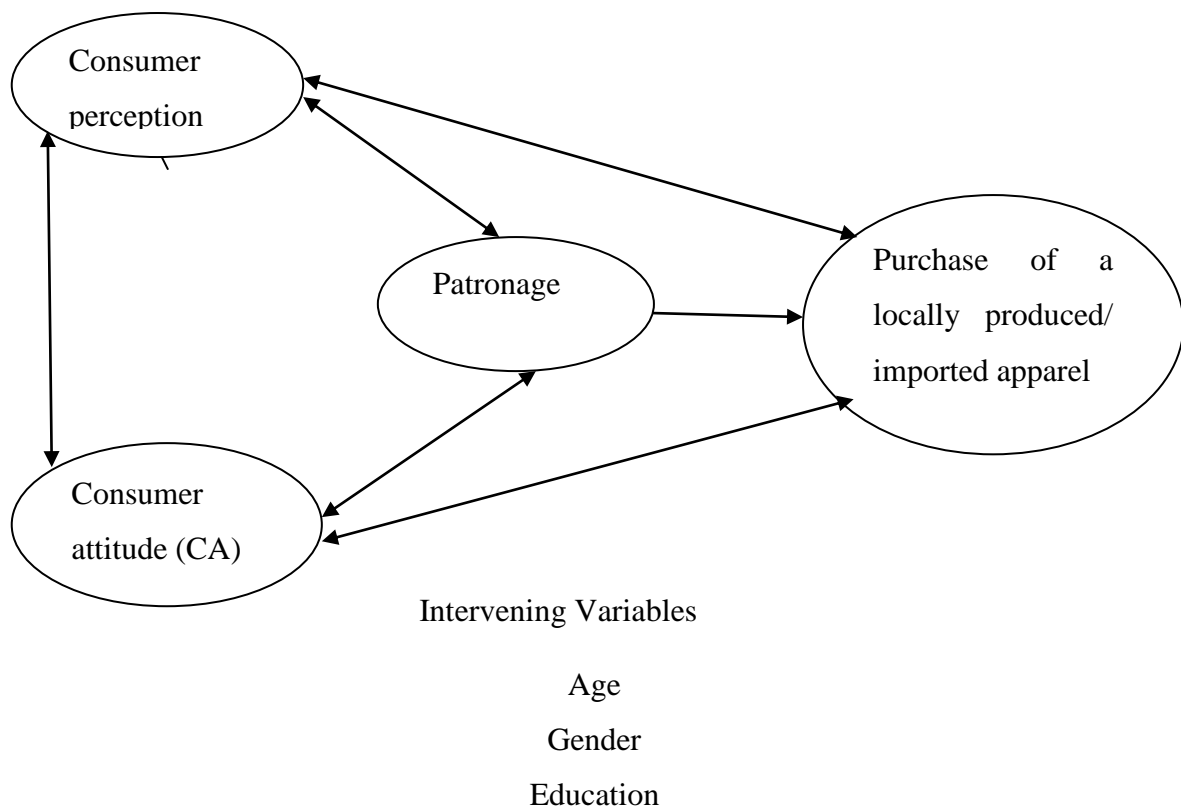


Figure 1.1: Factors that affect Personal Attitude and Behaviour

Source: Adopted from Bandura, A. (2001, p, 15)

CHAPTER TWO: LITERATURE REVIEW

2.0 Introduction

This chapter discusses the following topics in relation to consumer perception, attitude and patronage towards purchase of imported versus locally-produced apparel; consumer concept, consumer buying behavior, consumer perception, consumer attitude, consumer ethnocentrism, consumer patronage, conspicuous consumption, consumption of fashion apparel and country of origin.

2.1 The Consumer Concept

Consumers can evaluate a product along several levels. The basic characteristics of products are inherent to the generic version and are defined as the fundamental advantages offered to a consumer (Leon & Kanuk, 2007). Consumers analyze a product along two kinds of variables:

- i) Intrinsic variables such as price, brand, warranty and country of origin.
- ii) Extrinsic variables such as culture, reference groups, lifestyle and personality.

This stereotyping may also be due to attitudes towards the people of a given country, familiarity with the country (Opoku & Akorli, 2009) and the background of the consumers (Leon & Kanuk, 2007). Edwinsson and Nilson (2009) researched on the Kenyan fashion market and found that consumers are unaware of domestic fashion brands and have low esteem of their capacity in fashion. Instead, the foreign apparel forms the ideal standards that they use to compare with the local brands. The local fashion brands as reported by Edwinsson & Nilson, (2009), are unreliable as most designers are unable to deliver quality products at the required time. This study aims at analyzing consumer perception, attitude

and patronage towards domestically produced apparel in comparison with imported apparel, by identifying what beliefs exist about various products in this sector.

2.2 Apparel Consumer Buying Behavior

Many people consume a wide range of apparel products every day, from basic necessities to high-valued collectables. According to Schiffman and Kanuk (1995), consumer behavior is about how people make their decisions on personal products with the use of their available resources such as time, money and effort. According to Optimal Distinctiveness Theory, individuals strive to maintain a balance between the need for peer and family assimilation, and autonomy and differentiation (Sorrentino, Seligman & Battista, 2007). The distinctiveness of fashion features such as designer brand, celebrity endorsement and media reviews play the strongest role in the buying behavior among consumers (Calvo & Marrero, 2009). Arpan and Peterson (2008), suggest that the perception of a person on his personality is a distinctive and salient trait that differentiates behavior. Individuals who have high social standing and are adaptive to change in lifestyle are driven by fashion demonstrations.

The involvement of consumers in fashion products depends on their own perceptions and on peers' response to their personality and ability to change (Pineiro, 2008). The nexus between clothes and identity is perceived by consumers from the perspective of their values generated in various social interactions. Consumers get involved in exhibiting fashion and lifestyle as an aesthetic way of presenting their personality. Accordingly, clothing is often considered as an opportunity for communicating a new order of identity for a person as is the case with many Kenyans.

2.3 Consumer Perception towards Apparel Products

Kotler (2008), defined perception as the process by which information is received, selected, organised and interpreted by an individual. Some of the factors that influence consumer perceptions of a brand include Quality, which is taken into account when making the choice of apparel. According to Uggla (2001), quality is an integral part of a brand identity. Price, which according to McDonald and Sharp (2000), can be used as a basis for apparel choice in two ways; going for the lowest price in order to escape financial risk or the highest price in order to achieve product quality.

Another factor is influence by other people which according to Kotler, Wong, Saunders, and Armstrong, (2005) plays a vital role in consumers' decision processes. Consumers usually consult each other, regarding a new product or brand and seek advice. Advertisement also influences consumers' purchasing decisions. Advertisement is a conspicuous form of communication. Another one is convenience of a brand, including its accessibility. Such has a significant effect on consumers (Lin & Chang, 2003). Customer satisfaction is also another key factors in modern marketing. If the customers are satisfied with the provided goods, the probability that they would buy the goods again increases (Chen & Ko, 2007).

According to Edwinson and Nilson (2009), Kenyan domestic brands have low credibility and this is one of the reasons why the Kenyan consumer does not trust the domestic fashion designs. This also explains why Kenyans are not willing to pay high prices for the local brands. They demand justification for the high prices for the local fashion brands. Knowledge regarding the consumer's wants and needs is also very important (Edwinson & Nilson, 2009).

2.4 Consumer Attitude towards Apparel Products

Attitude has been defined as “an enduring organization of motivational, emotional, perceptual and cognitive process with respect to some aspects of the individual’s world” (Evans, Jamal, & Foxall, 2006). According to Wang and Heitmeyer (2006), an individual’s attitude is an outcome of learning processes and is influenced by personal experience, family, friends and marketing strategy. The learned outcome leads a person to develop either a liking or a disliking towards it. Attitudes exist because they serve some function for the individual (Solomon, 2008) and depend on the underlying motives of the person. There are four primary functions of attitude: The first one is ‘Utilitarian function’ which are attitudes towards a product based on whether they result in pain or pleasure. Another one is Value-expressive function which is attitudes that an individual form due to how the product describes the individual as a person. The third one is ‘Ego-defensive function’ which is attitudes that a person forms to protect oneself from internal feelings or external threats. The last one is ‘Knowledge function’ which is attitudes an individual forms due to need, structure or meaning (Solomon, 2008).

Attitude is developed through experiences (Solomon & Rabolt, 2007). Attitude is affected by what a person knows about something (cognition); how strongly the person takes position for or against the object (affection); and the intention to act regarding the object (behavior).

2.5 Consumer Ethnocentrism Concept

The term “ethnocentrism” stems from a more general concept developed at the beginning of the last century by Sumner in 1906. According to Sumner, ethnocentrism is “the view of things in which one’s group is the center of everything, and others are scaled and rated with

reference to it. Each group nourishes its own pride and vanity, boasts itself superior, exalts its own divinities and looks with contempt on outsiders” (Sumner, 1906).

Consumer ethnocentrism (CE) refers to the phenomenon of consumer preference for domestic products, or prejudice against imports (Levine & Campbell, 1972). In 1987, the term consumer ethnocentricity was introduced by Shimp and Sharma as a distinctively economic form of ethnocentrism which is domain-specific for the field of consumer behavior and has marketing implications. It is argued to represent the beliefs held by consumers about the appropriateness, indeed morality, of purchasing foreign-made products in place of local-made products (Shimp and Sharma, 1987). In functional terms, Shimp and Sharma stated that CE provides the individual a sense of identity, feeling of belongingness, and an understanding of what purchase is acceptable or unacceptable to the in-group (i.e. those with which an individual identifies).

Some scholars argued that ethnocentrism is a part of human nature (Herche 1992; Kucukemiroglu, 1999) and claimed that it is a trait-like property of one’s personality (Shimp & Sharma, 1987). Accordingly, it can be said that ethnocentric tendencies are indeed a separate matter from quality evaluations or past experience with product (Herch, 1994). Consumers with high ethnocentric tendencies are probably most prone to biased judgments’ by being more inclined to adopt the positive aspects of local-made products and to discount the virtues of foreign-made products.

From the perspective of ethnocentric consumers, purchasing imports is wrong because it is not only immoral and unpatriotic, but also detrimental to the domestic economy and results in loss of jobs in industries threatened by imports (Shimp & Sharma, 1987). Consumers

therefore tend to purchase local products, even if the quality is inferior to (Wall & Heslop, 1986) and the price is higher than that of imports (Balabanis et al., 2001). Additionally, highly ethnocentric people generally take pride in their own values, symbols and people and view domestic products as objects of pride and identity as opposed to those from other countries (Kinra 2006; Upadhyay & Singh, 2006).

From the above, it can be concluded that the more ethnocentric a nation is, the less favorable consumers' attitudes and the less likely consumers will hold preferences and purchase intentions toward foreign products (O'Cass 2002). Besides, as the implication is that choosing a foreign product can threaten domestic industry, ethnocentrism is likely to boost when economic times worsen (Ueltschy 1998). In contrast to ethnocentric consumers, non-ethnocentric consumers believe that foreign products should be evaluated on their own merit and on the basis of the utility and benefit they offer to consumers without consideration for where they are manufactured or assembled (Shimp & Sharma 1987).

Additionally, Kaynak and Kara (2002) posited that the strength, intensity and magnitude of CE differ from country-to country and culture-to-culture.

According to Klein *et al.* (2006) and Wang and Chen (2004), it is unclear how CE in developing economies manifests itself since little research has been conducted in such countries. Similarly, Batra *et al.* (2000) supported that there is a particular lack of research looking at the variables which may moderate the relationship between CE and willingness to buy domestically-made products in developing countries. According to Hamin and Elliott (2006), there is increasing evidence for the view that it is essential for less-developed countries to be more aware of the issues of Country of origin (COO) and the concept of CE.

The scholars made a point that when considering the combined effects of COO and CE, various possibilities arise.

For consumers from more developed countries, it seems likely that the COO effect and CE will lead the consumers to a preference for their domestic products. However, for consumers from less-developed countries, there are contrary expectations. On the one hand, the COO effect will lead the consumers to a preference for foreign products from more developed countries. CE, on the other hand, will lead to a preference for domestic products. For this reason, the COO effect and CE provide mixed signals for consumers. It therefore appears to be more difficult to predict preferences and choices of consumers from less-developed countries (Hamin & Elliott 2006). From the results of this study, the consumers preferred apparel from more developed economies in regard to CE and COO.

The concept of CE and COO bias are often confused, though the two concepts are distinct and independent of each other (Shankarmahesh, 2006). According to Herche (1992), an American consumer can have a positive COO effect for French wine because of its product-class attributes but decide not to buy it because of nationalistic rationale. Therefore, CE is more of a general tendency to avoid purchasing foreign products as opposed to a specific COO image. Furthermore, CE represents the affective and normative aspects of consumer behavior, whereas COO represents the cognitive and affective aspects of consumer decision-making. The normative dimension is thus a unique aspect of CE (Shankarmahesh 2006).

Among empirical studies, a major contribution to consumer research has been the development of international application of the consumer ethnocentrism scale (Kaynak &

Kara, 2002; Kucukemiroglu, 1999). The development of the CETSCALE by Shimp and Sharma (1987) resulted in 17 items scored on a seven-point Likert-type format that represents an accepted means of measuring consumer ethnocentrism across cultures and nations and more favorably evaluate domestic products in comparison with imported products. The CETSCALE developed by Shimp and Sharma was used in this study to answer questions on consumer patronage and ethnocentric tendencies. This was on a seven point likert scale.

2.6 Consumer Patronage of Apparel products

Another factor likely to affect brand attitude is consumer patriotism (Shimp & Sharma 1987; Han 1988). According to Han (1998), consumers' patriotic emotions had significant effects on attitudes and purchase intentions. According to him, consumer patriotism may indicate one's willingness to make a sacrifice in order to purchase a domestic brand. Thus, one would expect that consumer patriotism may play an important role in consumer attitudes toward foreign brands. Klein *et al.* (2006), suggest that generally low quality of domestic goods in developing and transitional economies might stimulate consumers to make trade-off between patriotic feelings and product quality.

According to Balabanis, Diamantopoulos, Mueller and Melewar (2001), patronage is “a strong feeling of attachment and loyalty to one's own country without corresponding hostility towards other nations.” Consumer patriotism affects attitudes about products and purchase intentions (Kaynak & Kara, 2002; Luque-Martínez, *et al.*, 2000). Herche (1994) suggested that consumer ethnocentrism carries the notion of consumers' patriotic emotions and is high when a consumer is emotionally engaged in purchasing imported products.

However, the above role of consumer patriotism may be moderated by consumers' familiarity with a country's products. Specifically, consumer patriotism may play a greater role in attitudes for consumers who are not familiar with the country's products than for those who are. The former consumers may not have enough experience or knowledge to estimate the economic consequences of not choosing a foreign product. Fishbein (1967), developed his attitude model with the basic assumption that in order to have a better understanding of human behavior, the measure of attitudes should not be oriented merely toward evaluating attitude toward objects, people, or institutions themselves, but rather toward assessing the attitude toward performing a specific behavior related to them (Beaudoin *et al.*, 1998; Wang & Heitmeyer 2006). Fishbein (1967), explained that an individual's attitude toward performing a behavior is determined by two major components: The first one is the strength of the beliefs held about the objects, and the second is the individual's subjective evaluation of those beliefs.

In addition, as noted above, the Fishbein theory assumes that human beings are usually quite rational and make systematic use of the information available to them. Thus, those who are familiar with products from a given country are likely to take a rational approach in product evaluations.

Consumer ethnocentrism, as conceptualized by Shimp and Sharma (1987), is one of the components of a complex theoretical construct related to the cognitive, affective and normative orientations of the consumer towards imports. This viewpoint is supported by Durvasula, Andrews, and Netemeyer (1997), who state that ethnocentric individuals have a strong positive attitude towards their own country. This affects their willingness to buy

foreign and domestic products (Wang & Chen, 2004). A study by Balabanis and Diamantopoulos (2004), found that ethnocentric consumers can define their positive intention towards domestic products better than their negative intentions towards imported ones.

2.7 Consumption of Fashion Apparel

The present study focuses on a specific product category, namely apparel. It is therefore crucial to examine the consumption of clothing and the attributes of apparel considered by consumers when making purchase decisions. From time immemorial, the primary use of clothing was for protecting and covering human body. Nowadays the purpose of wearing clothes, however, has changed. Clothing has become more than a basic necessity for human beings (Alexander *et al.*, 2005). According to O’Cass (2004), clothing has been used as a code or a language which allows a message to be established and selectively understood. Thus, clothing has been turned into an instrument of communication for consumers (Noesjirwan & Crawford, 1982). In addition, fashion clothing also carries cultural and social meanings of the brand.

According to Marcoux *et al.*, (1997), when the consumption product becomes a communication tool, image variables may be considered as the intangible attributes of the product that carry cultural and social meanings. These image variables emerge from the symbolism of advertising, the celebrity endorsement, the brand, and the COO of the product. The above are four cognitive representations individuals have of their environments (Marcoux *et al.*, 1997). Consequently, fashion clothing appears to represent social identity rather than personal identity (Noesjirwan and Crawford, 1982).

O’Cass (2000), supported that clothing can fulfill other functions besides warmth and protection. It involves indicating the importance of an individual, revealing to others an individual’s status, telling what an individual is like (O’Cass, 2000), reflecting self image, expressing identity, and giving individuals a way to impress others (Beaudoin *et al.*, 1998). Furthermore, Bearden and Etzel (1982), classified clothing as a public necessity where reference group influence on the product category is weak, but where reference group influence on the brand choice is strong. As fashion clothing occupies a central position in many people’s lives and has significant social functions and meanings as well as economic value in many societies (O’Cass, 2004), understanding how people make different judgments about apparel is therefore important.

Apparel attributes are perceived differently by different consumers (North *et al.*, 2003) because people tend to have different attitudes, values and expectations for wearing clothes, (Alexander *et al.*, 2005). In an apparel purchase, a variety of criteria seem to influence consumers’ evaluations and purchase intentions (North *et al.*, 2003). Forsythe *et al.* (1999) pointed out that physical appearance of apparel products can be viewed as a multi-dimensional construct, comprising both cognitive and affective dimensions, because apparel reflects a combination of cognitive cues (such as workmanship, fabric quality) and affective cues (such as style, design, fashionability).

North *et al.* (2003) indicated that price, care requirements, brand, product composition (i.e. style and color), store image, and advertising image are important consideration influencing consumers when purchasing clothing items. Dickerson (1982) researched the relative importance that consumers attach to five garment attributes, including price, care, country-of-origin, quality and style. Beaudoin *et al.* (1998) classified 12 attributes that associated

with the overall attitudes when purchasing imported and domestic apparel products, namely: good fit, durability, ease of care, good price, comfort, quality, choice of colour, attractiveness, fashionableness, brand name, appropriateness for occasion, and choice of styles. Wang and Heitmeyer (2006), adapted the instrument from Shimp *et al.* (1989). The apparel attributes examined include care instruction, brand name, quality, fiber content, comfort, color, attractiveness, fashionableness, good fit, good price, ease of care, suitability, and appropriate for occasion (Wang & Heitmeyer, 2006).

There are several reasons why people wear clothes. A fundamental motive is related to the function of clothing. Many authors, for example O’Cass (2004), Beaudoin, Moore and Goldsmith (1998), Bearden and Etzel (1982), Alexander, Connell, and Presley (2005) agree on four main theories for buying fashion: The first one is ‘Modesty Theory’ which suggests that a person wears clothes to cover private parts of the body. Another one is the ‘Immodesty Theory’ which explains that the reason for clothes is to draw attention to parts of the body. The third one is the ‘Protection Theory’ which posits that the purpose of wearing clothes is to protect the wearer from elements such as insects and weather. And finally the ‘Adornment Theory’ which suggests that clothing is an aesthetic expression and personal decoration that influences a person’s identity and raises the self-esteem (Solomon and Rabolt, 2009).

According to O’Cass (2004), fashion clothing has significant social functions, meanings and economic value in many societies. Apparel attributes are perceived differently by consumers since people tend to have varied attitudes, values and expectations for wearing clothes (North, De Vos & Kotze, 2003; Alexander, *et al.*, 2005). When purchasing apparel products, price, care requirements, brand, product composition such as style and color, store image, and advertising image are important considerations influencing consumers when

purchasing clothing items (North, *et al.*, 2003). Van Weele (2005), notes that consumers would appreciate the basic combination of price and quality, however with new trends a demand for individuality and taste is increasing. The consumers are demanding for unique products that are designed for their particular need. This is true with empowered consumers. Wang and Heitmeyer (2006), concur with Beaudoin *et al.* (1998), in classifying 12 attributes associated with the overall attitudes when purchasing imported and domestic apparel products: good fit, durability, ease of care, good price, comfort, quality, color, attractiveness, fiber content, fashion ability, brand name, appropriateness for occasion and styles. These attributes were used to determine the Kenyan consumers' perception, attitude and patronage towards imported versus locally produced apparel in Kenya.

2.8 Conspicuous Consumption of Apparel Products

Conspicuous Consumption (CC) refers to consumers' desire to provide prominent visible evidence of their ability to afford luxury goods (Piron, 2000). Motivated by a desire to impress others with their ability to pay particularly high prices for prestige, conspicuous consumers may be inspired by the social rather than the economic or physiological utility of merchandise. CC can be found in all social and income groups from the richest to poorest (Wang & Chen, 2004). Research shows that consumers in developed countries tend to perceive local products as being superior to imported ones (Damanpour, 1993; Elliott & Cameron, 1994; Herche, 1992). The reverse is true for consumers in developing countries of which Kenya is one (Agbonifoh & Elimimian, 1999; Otieno, 1990; Nyang'or, 1994; Batra, Ramaswamy, Alden, Steenkamp & Ramachander, 2000; Wang, Chen, Chan & Zheng 2000, Sirirat Sae- Jiu's, 2007).

Given that consumers' evaluation of quality of domestic or imported products influences their purchase preferences, the impact of ethnocentrism on willingness to buy is different between developing and developed countries. This discrepancy is more pronounced when the import is related to conspicuous consumption such as apparel, as consumers in developing countries of which Kenya is one, often regard foreign products as status symbols (Edwinsson & Nilson, 2009; Batra *et al.*, 2000; Nyang'or, 1994, Otieno, 1990; Imo & Maiyo, 2012)

2.9 Country of Origin Phenomenon

One factor that is believed to influence consumer perceptions, evaluations, and purchase intentions of apparel products is the concept of Country-of-Origin (COO). This, according to Usunier (2006), is one of the most researched international aspects of consumer behavior. In Africa, attempts have been made to examine the effect of COO in various spheres of life. A study conducted in Nigeria by Agbonifoh and Elimimian (1999); Olaleke (2010) as well as in Ghana by Opoku and Akorli (2009), showed that products from technologically advanced countries were viewed more positively by nationals of developing countries than those from the less advanced countries.

Ferguson, Dadzie and Johnston (2008), have studied COO effects in service evaluation in five West African countries. They found that situational personal characteristics such as motivation and ability to process information may influence the use of COO attributes in evaluating service. Opoku and Akoril (2009); Olaleke (2010); Pharr (2005), Saffu and Walker (2006), in examining the impact of COO effects and consumer attitudes towards buy-local campaign initiatives, found that the attitudes of consumers can be characterized as protectionist, nationalistic and of self-interest. The preceding empirical evidence, though

not exhaustive, suggests that consumers in developing economies, of which Kenya is one, view products from developed countries more favorably than products from their own country. However, this has not been verified in Kenya hence the need for this study.

2.10 Summary of Literature Review

This chapter provided a detailed review of the literature, along with the results of empirical research relevant to consumer perception, consumer attitude, consumer ethnocentrism, consumer patronage of fashion apparel, consumption of fashion apparel and Country-of origin phenomenon.

It has been noted in the literature review that, while evaluating products, brands or services, both intrinsic and extrinsic cues can affect consumers' judgments, which further turn into consumers' attitude towards the object, thereby influencing their purchase intention and behavior (Wang & Heitmeyer, 2006). Consumers in developed countries tend to perceive domestic products as being superior to imported products (Bilkey & Nes 1982; Damapour 1993; Elliott & Cameron 1994; Samiee 1994), whereas the reverse appears true for consumers in developing countries (Opoku & Akoril 2009; Olaleke 2010; Pharr, 2005; Saffu & Walker 2006). Two main variables affecting consumer evaluation between foreign versus domestic products are perception of quality and consumer ethnocentrism (Wang *et al.*, 2004). Lack of literature on consumer perception, attitude and patronage from Kenya, as a developing country, implies that this study will contribute to knowledge, hence the significance of this study.

CHAPTER THREE: METHODOLOGY

3.0 Introduction

This chapter discusses the research design, measurement of variables, study area, population of the study, sampling techniques, sample size, research instruments, pre-testing, reliability and validity of instruments, data collection procedure, data analysis and presentation, and ethical considerations.

3.1 Research Design

This study adopted a survey design which involves an inquiry on information gathering from a selected sample through a questionnaire. This technique is often undertaken to learn about people's knowledge, beliefs and preferences, and assess the views of a general population (Kotler, 2000). This design was chosen as it best fits the nature and purpose of this study. With its strong statistical analysis capability, high reliability and generalizability, the researcher was able to make inferences from the large population for the study.

3.2 Measurement of Variables

Table 3.1 illustrates the dependent and independent variables as well as the statistical tests that were used to measure them.

Table 3.1. Independent and Dependent Variable

Independent Variable	Dependent Variable	Statistical test
Consumer perception	Clothing attributes and selection	Multiple regression analysis
Consumer Attitude	Clothing attributes, behavior, feelings, knowledge, age, income levels	ANOVA
Consumer Patronage	Feelings, behavior, selection of apparel	ANOVA, Chi- square

3.3 Study Area

The study was conducted within Nairobi County, in the Republic of Kenya (fig 3.1). It has a population of 3,138,369 (GOK, 2012). The choice of Nairobi County was based on its representation of the various Kenyan economic and social strata and rapid development. Nairobi is the capital city of Kenya and the most developed city in the East African region, hosting numerous industries ranging from textiles, food processing to automobiles (Masese, 2011). Nairobi County boasts of a large market for its products both domestic and imported, with a large clientele. The county also hosts the headquarters of the ministries used in the study. The different ministries are replicated in the other counties in Kenya.

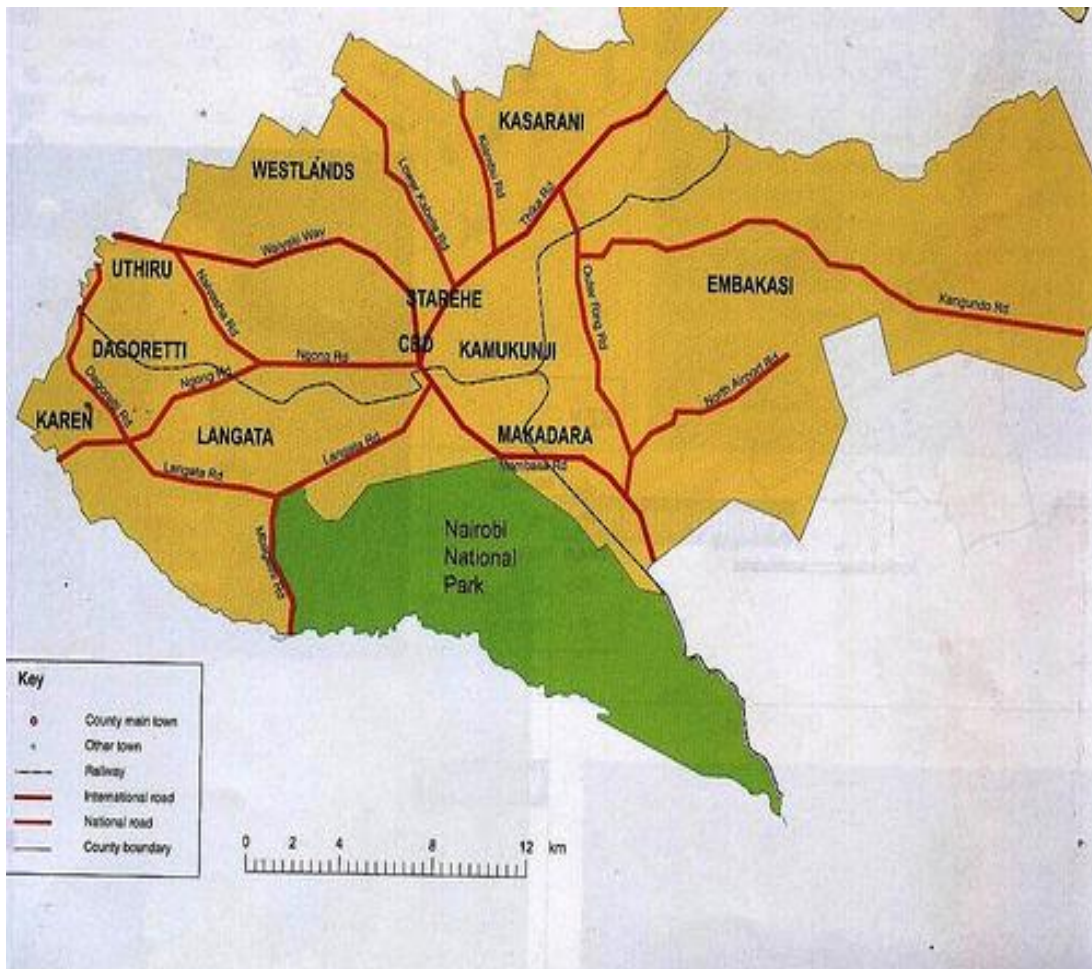


Fig. 3.1 Study area

Source: Google Maps, 2011

3.4 Target Population

The study targeted employees of the Central Government aged 25 years and over. There were 18 ministries considered with a population of 40,000 employees nationwide (PSC, 2012). In Nairobi County there were 2000 employees aged 25 years and above (PSC, 2012). The choice of this category of consumers was partly based on the fact that it constituted the low to upper income bracket, which had a purchasing power. The Government is a more secure employer, in terms of job tenure, and also the largest employer in Kenya (NCIC, 2011). The 25 years and above group comprised both the young and the old. Young people are more likely to embrace and be easily influenced by new cultures, trends and lifestyles than older generations. They are more fashion-oriented and have a high level of appearance consciousness unlike the old who are more set in their ways (Suadmalai, 2006).

3.5 Sampling Techniques

The sampling procedure that was utilized was a proportionate stratified multi-stage random sampling. The first stage was done as a simple random selection of nine ministries from a list of 18 Ministries that formed the strata used for drawing the sample for this study. This was done by using a sequence of numbers from a random numbers table, after obtaining a list of the ministries. After sampling the ministries, a sample of employees was drawn using a simple random technique. The list of employees was obtained from the human resource personnel in each sampled ministry.

3.5.1 Stratification

The Ministries formed the strata used for drawing the sample for this study. This was based on the assumption that the units in each of the ministries were homogeneous. In order to

provide reliable estimates, the sample size for the study was 322 individuals, which was expected to take care of non-response. The first step involved choosing 9 Ministries from the target population of 18 Ministries. A sampling interval $i=N/n$, was used where,

N =population size, i = sampling interval

n =sample size,

Therefore $i=18/9= 2$

A random start, starting from one was taken to enable the researcher select the ministries and a sampling interval of 2 was used. The second stage was to draw a sample from the selected ministries using the Probability Proportional to Size (PPS) method with the number of respondents per ministry being the measure of size.

3.5.2 Sample Allocation

Table 3.2 shows the selected Ministries, target employees and number of sampled employees in each Ministry.

Table 3.2 Sample Allocation

Ministry	Total No. Employees	Sample selected
Office of deputy president	347	60
Ministry of devolution and planning	80	6
Ministry of Defense	25	2
Ministry of National Treasury	212	37
Ministry of Transport and infrastructure	153	12
Ministry of lands, housing and urban development	275	65
Ministry of Sports, Culture and Arts	167	38
Ministry of Agriculture, Livestock and Fisheries	645	95
Ministry of East African Affairs, Commerce & Tourism	96	7
Total	2000	322

3.5.3 Employee Selection

It was not possible to select the employees before data collection because the employee list was not available before data collection. Therefore it was the responsibility of the researcher to randomly select the respondents upon getting to the Ministry offices. The following process was used.

The researcher contacted the Human Resource Officer or their equivalent in the Ministry. This person was consulted to determine the number of males and females in the Ministry. After obtaining an estimate of the total male/female distribution in the Ministry, a proportionate sample was drawn as indicated in Table 3.2.

The overall selection probability of each employee i in ministry h was the product of the selection probabilities:

$$P_{hi} = P_{1hi} \times P_{2hi}$$

The sampling weight for each employee i of ministry h was the inverse of its selection probability:

$$W_{hi} = 1 / P_{hi}$$

This weight was further adjusted for non-response.

3.6 Sample size

In order to provide reliable estimates, the sample size for the study was estimated using Krejcie and Morgan table (1970), for sampling (Appendix C) and for a population of 2000 employees the sample size was therefore 322 respondents. This was based at 95% confidence interval and an alpha level of 5%. This table was used because it gives easy

reference to the required sample size. The relationship between sample size and total population is illustrated in the sampling table. The sampling table also saves time that would be spent generating the sample size to use for a given population since no calculations are needed.

3.7 Research Instruments

The primary data was collected by use of a questionnaire, (Appendix B). The questionnaire consisted of a series of questions for the purpose of gathering information from respondents. According to Kombo and Tromp (2009), questionnaires are easy to use and provide a uniform and standardized manner of asking questions to respondents. They also provide a platform for recording and making reference during the process of analyzing information. It is a cost-effective way of collecting information and a large number of responses can be analyzed. Kombo and Tromp also observed that questionnaires are faster to administer to a larger number of respondents and save time.

The questionnaire comprised of four main sections (Appendix B) namely:

- Section A: Personal Information
- Section B: Country of Origin
- Section C: Attitude towards locally produced versus Foreign-made Clothing
- Section D: Consumer Patronage and Ethnocentric Tendencies

The questionnaire opened with the introduction of the research and stated confidentiality and anonymity of the respondents. The instructions on how to answer the questions were provided at the beginning of every section.

The first part of the questionnaire contained questions regarding personal information. These included gender, age, estimated monthly income, money spent on clothing, number of times one went for shopping, source of fashion information and the places for shopping.

The second part of the questionnaire contained questions regarding knowledge of country of origin of apparel that the respondents purchased. In total, there were five questions, which included the following; awareness of country of origin, preferred country of origin for apparel, reasons for preferred country of origin, perception of quality of clothing and perception of the fashion industry in Kenya. To compute for the country of origin of respondents, the countries were chosen for use from the preliminary study (Appendix D).

The third part of the questionnaire contained questions regarding attitude towards locally produced versus imported apparel. Since the main interest of this research was on imported clothing products, as a whole category, the study intentionally focused on respondents' opinions about imports in general and not opinions about a specific brand or about apparel from a specific country. To compute the overall attitude towards locally-produced and imported apparel for each respondent, apparel attributes were chosen for use from the preliminary study (Appendix D), which resembled those in Beaudoin *et al.*'s, (1998) study.

The 12 attributes were:

- (1) Good fit
- (2) Durability
- (3) Ease of care
- (4) Good price
- (5) Comfort

- (6) Quality
- (7) Choice of color
- (8) Attractiveness
- (9) Fashionability
- (10) Brand name
- (11) Appropriateness for occasion
- (12) Choice of styles.

The fourth part of the questionnaire had questions regarding consumer patronage and ethnocentric tendencies. Respondents were presented with a set of statements comprising the reduced 9-item version of CETSCALE proposed by Shimp and Sharma (1987), to determine their extent of agreement of statements relating to the level of ethnocentrism, in reference to Kenyan apparel products in general. The respondents rated the items on a seven-point Likert scale (1 = strongly disagree to 7 = strongly agree). They were also required to give their opinion regarding what sells best between locally-produced and imported apparel. The respondents were also required to state how the Kenyan fashion can be promoted in the Kenyan market.

3.8 Pre-testing

A pre-test study was undertaken before reaching the actual questionnaire design. The purpose of this pre-test study was particularly important for the formulation and wording of the questionnaires. Pre-testing helped in ascertaining whether the respondents would understand, interpret and answer the questions. Moreover, the process assisted in identifying and eliminating errors by the respondents. The pre-test involved 32 respondents that made 10 percent of the 322 respondents. Before the survey administration, the

questionnaires were pre-tested on a sample of 32 employees from two ministries not included in the research sample. These two ministries were Education, Science and Technology and Labor, Social Security and Services. The answering of the questionnaire lasted for 10-15 minutes. There were two main questions dealt with in the study. (Appendix D).

From the results of question 1, eight countries that were frequently indicated in the pilot questionnaire were chosen to use in the actual questionnaire. Four of them are western countries (America, Britain, France and Italy); the other four are eastern countries (China, Japan, Korea and Turkey) and the last one Kenya. These countries will be utilized in identifying consumer preference patterns for country-of-origin of apparel as well as consumer perception of quality. Twelve apparel attributes that most frequently chosen in question 2 were employed, i.e. good fit, durability, ease of care, good price, comfort, quality, choice of colour, attractiveness, fashionableness, brand name, appropriateness for occasion, and choice of styles.

The purpose of pre-testing the questionnaire was to find out whether or not the questionnaire instructions, statements and questions were understandable or ambiguous. It was also to identify the time taken to complete filling the questionnaire and the overall opinion of the questionnaire layout. The sample was selected on the basis of various assumptions, including respondents being regular consumers of clothing products, having knowledge about fashion clothing, and being easily accessible. In general, the participants agreed that the questionnaire was suitable, logical and valid. Nevertheless, the respondents suggested some minor modifications. The items that appeared to be problematic and

ambiguous were reworded and refined. Some wording corrections were made and the general layout of the questionnaire was improved.

3.9 Reliability and Validity of Instruments

Pre-testing was conducted to ensure validity and reliability of the questionnaire. For reliability analysis, the study used Cronbach's co-efficient alpha which estimated the reliability of question items by determining the internal consistency of the test and the average correlation of items within the test (Cronbach's, 2004). Cronbach's co-efficient, alpha was 0.8. Validity was established through the pre-test questionnaire whereby the respondents agreed that the questionnaire was suitable, logical and valid. This was done by having a one on one discussion after collecting the questionnaires.

3.10 Data Collection Procedure

A permit to carry out the research was obtained from Kenyatta University graduate school, the National Commission for Science, Technology and Innovation, the County Commissioner and the County Education officer of Nairobi County. In the survey-implementation stage, a permit was sought from the various ministries (Table 3.2) to carry out the survey. The participants were informed about the purpose of this study and how to complete the questionnaire.

The researcher distributed the questionnaires which were self administered (i.e. the respondent completed the questionnaires on their own). The contact persons assisted in collecting the completed questionnaires and handing them over to the researcher.

Data collection was carried out in government ministries in Nairobi County. Contact persons were identified in the relevant ministries through the human resource department. The contact persons were to assist in identifying sampled respondents. To minimize bias and further to maximize the representativeness of the sample, the survey took place on weekdays, at different hours of the day and on different days of the week, over a period of two months. The researcher tried to avoid the potential bias that could occur if the data was collected at a single location, at a single time on a single day. Moreover civil servants work on weekdays only.

3.11 Data Analysis and Presentation

Collected data was analyzed using Statistic Package for Social Science 17.0 (SPSS) as the main statistical package. This was to help draw conclusions using inferential statistics and measures of dispersion. Chi-square Goodness- of- fit- test was used, to find out whether there was variation in the attributes that consumers considered when selecting apparel. Analysis of variance (ANOVA) was used to test the differences between perception of consumers, factors that influenced the perception and consumer attitude towards imported and domestic apparel. Multiple regression analysis was used to test the effect of consumer attitude and patronage on purchase of imported or domestic apparel. The data collected was presented using tables, percentages and text.

3.12 Ethical Considerations

The researcher used the principle of voluntary consent, confidentiality and full introduction at commencement of survey. The questionnaire was accompanied by a cover letter (Appendix A). The GOK research regulations and guidelines (Appendix E) and Kenyatta University graduate school guidelines were followed.

CHAPTER FOUR: FINDINGS

4.1 Introduction

This chapter presents the findings of the study with respect to the following objectives: to establish the attributes that professionals consider in selecting apparel; to determine the perception of public servants towards locally-produced and imported apparel; to establish the factors that influenced the perception, preference and attitude of public servants towards locally-produced and imported apparel; and to establish the level of patronage of public servants in Nairobi on purchase of apparel products.

The study involved the collection of data through the use of questionnaires which were administered through drop and pick basis. This study targeted a population of 2000 employees of the central government in Nairobi County. The population was drawn from 18 government ministries from which a sample of nine was chosen. Out of the nine ministries, 322 respondents were selected as shown in table 3.2.

4.1 Response Rate

The response rate is expressed as the return rate calculated as a percentage of the total number of questionnaires that the researcher gave out. Out of the total 322 questionnaires the researcher administered, 287 were returned. The usable questionnaires were 267. Table 4.1 illustrates the response rate which was 83%. This percentage was therefore fair and representative. Mugenda (2003), stipulate that a response rate of 75% is adequate for analysis and reporting. A response rate of 82.9 per cent is therefore considered an adequate rate to base the study conclusions.

Table 4.1 Response Rate

	Frequency	Percentage (%)
Distributed	322	100
Returned (Usable)	267	82.9
Returned (Spoilt)	20	6.2
Un Returned	35	10.9

4.2 Characteristics of the Respondents

This section analyses the key characteristics of the respondents and seeks to establish gender, age, income and spending characteristics. The sample of this study was a stratified multi-stage random sample comprising 322 government employees.

4.2.1 Gender of the Respondents

The gender breakdown for the sample comprised of 47 per cent male employees and 53 per cent female. The distribution was therefore, almost equally balanced.

Table 4.2 Demographic Characteristics of the Sample

Gender	Frequency (n=267)	Percentage (%)
Male	151	47
Female	171	53

4.2.2 Age of the Respondents

Table 4.3 shows the age of the respondents who participated in survey. Respondents were categorized into five age groups namely; '25-30'years, '31-35'years, '36-40'years, '41-45'years and '46 years and above'.

Table 4.3 Ages of the Respondents

Age (years)	Frequency (n= 267)	Percentage (%)
25- 30	91	34
31- 35	56	21
36-40	27	10
41-45	43	16
46 and above	50	19

The results in Table 4.3 show that, the youngest group 25-30 years represented 34 per cent of the sample. Those between 31-35 years represented 21 per cent and 36-40 years old constituted 10 per cent, 41-45 years were 16 per cent and 46 and above years constituted 19 per cent.

4.2.3 Estimated Monthly Income

Table 4.4 shows the frequencies and percentages of the estimated monthly income of the respondents.

Table 4.4 Estimated Monthly income

Estimated monthly income (kshs)	Frequency (n=267)	Percentages (%)
30,000 and below	93	35
30,001.00 – 40,000.00	44	16
40,001.00 – 50,000.00	29	11
50,001.00 – 60,000.00	13	5
60,001.00 – 70,000.00	44	16
Over 70,000.00	44	16

According to the results inTable 4.4, the highest number of respondents earned Kshs 30,000 and below (35 per cent). This was followed by those who earned between Kshs 60000-70000 (16%), Kshs 70000 and above (16%), and Kshs 35001 to 40000 (16 %).

Kshs 40001 -50000 (11%). The least were those who earned between Kshs 50001 to 60000 (5%)

4.3 Behavioral characteristics

This section dealt with different characteristics of the respondents with regard to monthly expenditure, frequency of shopping, information search and country of shopping.

4.3.1 Monthly Expenditure

Table 4.5 illustrates the amount of money the respondents spent on their own clothing every month.

Table 4.5 Monthly Expenditure of Respondents on apparel

Monthly Expenditure (Kshs)	Frequency (n= 267)	Percentage (%)
Less than 5,000.00	128	48
5,001.00 – 10,000.00	80	30
10,001.00 -15,000.00	35	13
15,001.00 -20,000.00	11	4
20,001.00 – 25,000.00	3	1
Over 25,000.00	11	4

According to the results in Table 4.5, 48% of the sample ($n= 128$) specified that they spent less than Kshs 5000 each month for their own clothes while 30% of the respondents spent between Kshs. 5001-10000 on shopping every month, 13% spent kshs. 10001-15000. 4% spent Kshs 15001-20000 and Kshs over 25000. Only 1 % of the sample spent Kshs 20001-25000 on their own clothes.

4.3.2 Frequency of Shopping

The respondents were required to state how often they shopped for clothing. Table 4.6 shows the results.

Table 4.6 Frequency of Shopping of the Respondents

Frequency of Shopping	Frequency (n=267)	Percentage (%)
Occasionally	143	53
Once a Month	42	16
Two times a month	40	15
Three times a month	18	7
Four times a month	3	1
Five times a month	3	1
Over five times a month	18	7

Regarding shopping frequency (Table 4.6), 143 (54%) respondents responded that they shopped occasionally, 42 (16%) shopped once a month, 40 (15%) twice a month, 18 (7 %) three times a month, 3 (1%) four times a month, 3 (1%) five times a month, and 18 (7 %) more than five times a month.

4.3.3 Information Search

The respondents were required to state where they got information for fashion clothing before purchasing. Table 4.7 shows the findings which indicate that most of the respondents obtained their information from family members, relatives of friends.

Table 4.7 Information search

Information Search	Frequency (n=267)	Percentage (%)
Family/Relatives/Friends	104	39
Salesperson	40	15
Magazines	51	19
Television	27	10
Websites	29	11
Others	16	6

In respect to information search (Table 4.7), 39% of the respondents obtained information about fashion clothing before shopping from family/relative/friend, 19% from magazines, 15% from sales person, television 10% and website 11%. The remaining respondents indicated that they acquired shopping information from other sources that did not show in

the questionnaire. According to the respondents who answered ‘others’, they stated that they did not seek for information before shopping and just visited stores or the mall to look around. From these study findings, the respondents mainly obtained information from family/relatives/friends when they wanted to purchase apparel.

4.3.4 Country of Shopping

The respondents were required to state where they did their shopping i.e. in Kenya, outside Kenya or online .Table 4.8 shows the results

Table 4.8 Frequency and Percentage Distribution of Country of Shopping

Country of Shopping	Frequency (n=267)	Percentage (%)
In Kenya	227	85
Out of Kenya	19	7
Online	21	8

Table 4.8 illustrates the frequency distribution and percentage of where the respondents did their shopping. 85% of the respondents indicated that they did their shopping within Kenya, while 7% did their shopping outside Kenya and 8% online.

4.4 Country of Origin

The respondents were administered questions to investigate consumer awareness of country-of-origin of the products they bought. The respondents were required to state several variables about the country of origin, i.e. labels, preferred country of origin, reasons for preferred country of origin, perception of quality and perception of the fashion industry in Kenya

4.4.1 Checking Made-in Labels

The respondents were required to show how often they check the made in labels every time they made a purchase. The frequency of checking the manufacturer's country-of-origin of apparel before consumers make a purchasing decision is shown in Table 4.9

Table 4.9 Frequency Distribution and Percentage of Made-in Label Checking.

Checking made in labels	Frequency (n=267)	Percentage (%)
Every time	104	39
Most of the time	35	13
Sometimes	32	12
Rarely	77	29
Never	19	7
Total	267	100

According to the results in Table 4.9, 39% of the respondents check labels every time. 29% rarely check the labels, while 13% check labels most of the time. Respondents who check labels sometimes were 12% while those who never checked labels were 7%. This finding indicates that despite the fact that the respondents did their shopping in Kenya, they were nevertheless conscious of the country-of-origin of the apparel they bought.

4.4.2 Preferred Country of Origin

The respondents were required to state their preferred country of origin. Table 4.10 exhibits the mean preference rankings regarding country-of-origin, with the highest ranking as 1 and the lowest ranking as 8.

Table 4.10 Preferred Rankings for Country of Origin of Apparel

Preferred Country of Origin	Frequency	Mean	Standard Deviation	Rank
Japan	220	1.21	1.20	1
America	217	1.23	1.18	2
Kenya	214	1.25	1.17	3
China	214	1.25	1.17	4
Turkey	213	1.25	1.16	5
France	211	1.27	1.15	6
Italy	210	1.27	1.15	7
Korea	204	1.31	1.12	8
Britain	197	1.36	1.08	9

According to Table 4.10 the most preferred country of origin was Japan (mean = 1.21) followed by America (mean = 1.23) while china and Kenya were ranked third with (mean = 1.25). Turkey followed closely at (mean = 1.25), France (mean = 1.27) and Italy (mean = 1.27). The least ranked countries were Britain (mean = 1.36) and Korea (mean 1.31) respectively.

4.4.3 Reasons for Preferred Country of Origin

The respondents were required to give reasons for their preferred country of origin. Table 4.11 displays the study findings.

Table 4.11 Reasons for preferred Country of Origin

Reasons for Preferred Country of Origin	Frequency (n=267)	Percentage (%)
Quality	88	33
Affordability	48	18
Availability	18	7
Accessibility	5	2
Changing Culture	5	2
Ready market	3	1
Durability	32	12
Definite Fashion	24	9
Correct materials	13	5
Promote Kenyan	11	4
It's the Best	5	2
Like Style	5	2
Uniqueness	3	1

According to the results in Table 4.11, 33% of the respondents gave quality as the main reason for preferred country of origin, 18% stated affordability as the main reason, Durability was 12%, definite fashion 9%, availability 7%, correctness of material 5%, promotes Kenyan 4%, Style, accessibility, changing culture tied 2% and uniqueness and ready market were the least at 1%. Among all the attributes stated for preferred country of origin, quality ranked first. These study findings indicate that the respondents were concerned with quality of apparel more than all the other attributes.

4.4.4 Perception of Quality

To determine the perception of quality of fashion clothing, Table 4.12 provided the results, which indicated that France had better quality products (mean = 5.56) followed by Italy (mean = 5.54) and USA (mean = 5.52). The existence of same quality and better quality substitutes saw China, Japan and Korea ranked least in terms of quality.

Table 4.12 Perception of Quality

Countries	N	Mean	Std Deviation
Kenya	267	4.60	1.748
USA	267	5.52	1.474
China	267	3.91	1.694
Japan	267	4.48	1.526
Italy	267	5.54	1.430
France	267	5.56	1.392
Great Britain	267	5.42	1.557
Korea	267	4.47	1.555
Turkey	267	5.02	1.679

4.4.5 Perception of the Fashion Industry in Kenya

The respondents were required to state their perception of the fashion industry in Kenya.

Table 4.13 displays the findings

Table 4.13 Perception of the Fashion Industry in Kenya

Perception of Fashion Industry	Frequency	Rank
Growing	260	1
Consumers not well exposed to locally-produced apparel	234	2
Clothes not comfortable	187	3
Clothes not durable	180	4
Low quality products	175	5
Does not embrace Kenyan	170	6
Cheap Products	168	7
Lacks Government supports	167	8
Industry lacks exposure	166	9
Ready market not available	165	10

According to Table 4.13 the perception of the fashion industry in Kenya was that the industry was growing followed by a response that the respondents were not well exposed to locally-produced apparel while comfortability was ranked third. Durability was fourth, followed by low quality products in fifth and the need to embrace Kenyan products in sixth position. Cheapness of products was seventh while the least ranked perceptions were lack of ready market, lack of government support and need for exposure. Most of the respondents generally felt that the industry was growing even though it was not well exposed and lacked government support.

4.5 Attitude towards Locally-made versus Foreign-made Clothing

An attitude is hypothetical construct that represents an individual's like or dislike for an item. Attitudes represent positive, negative or neutral feelings of the consumer. In this section the respondents were required to state their attitude towards locally-made versus foreign made apparel in different aspects i.e. attitude when shopping, attitude towards locally made apparel and attitude towards foreign made apparel.

4.5.1 Attitude when Shopping

The respondents were required to state their attitude towards clothing when shopping for clothes. The aim of this question was to find out the attitudes the respondents had towards the clothing apparels. Table 4.14 displays the findings.

When shopping the origin of apparel products as well as other attributes were considered in order to capture their influence on the Kenyan Market. Table 4.14 provided descriptive statistics whose results indicated that good fit (mean = 6.65) and quality (mean = 6.50) were important fashion attributes. Durability was ranked third (mean = 6.49) and comfort (mean = 6.42) was fourth. Ease of care was ranked fifth position (mean = 6.03), Price was sixth position (mean = 5.97), followed by appropriateness for occasion in seventh position (mean = 5.78). Attractiveness came in eighth position (mean = 5.74) while color came position nine (mean = 5.69). Style came position ten (mean = 5.44), Fashionableness position eleven (mean = 5.38). The least ranked attribute was brand name which came position twelve. From these results it was clear that most Kenyan consumers considered good fit as the most important attribute when purchasing apparel. Quality and durability were also some of the highest attributes considered by Kenyan consumers when shopping for apparel.

Table 4.14 Important Apparel Attributes

Attributes	N	Mean	Std deviation
Good fit	267	6.65	0.907
Durability	267	6.49	1.133
Ease of care	267	6.03	1.468
Price	267	5.97	1.572
Comfort	267	6.42	1.142
Quality	267	6.50	1.139
Color	267	5.69	1.561
Attractiveness	267	5.74	1.706
Fashionableness	267	5.38	1.801
Brand name	267	4.88	2.041
Appropriateness	267	5.78	1.647
Styles	267	5.44	1.829

Table 4.15 Multiple Regression for Country of Origin and Apparel Attributes

Model Summary				
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.534 ^a	.285	.246	1.523
2	.620 ^b	.384	.292	1.475

a. predictors: (constant), Turkey, China, France, Japan, Usa, Britain, Korea, Italy

b. predictors comfort, brand name, appropriateness, price, ease of care, fashionableness, color, good fit, styles, durability, quality, attractiveness

c. Dependent variable: Kenya

Results in Table 4.15 show that the country of origin (model 1) was not statistically significant at a p-value = 1.523, whereas the important attributes with p-value of 1.475 were not statistically significant, where the level of significance is 0.05. The relationship obtained for the country of origin and important attributes as represented in Table 4.8 gave the model 1 summary with R square (R^2) at 0.534, which was strong. This implied that the

selected independent variables were adequately explaining the changes in the dependent variable at 62 per cent of the relationship between Kenya, other countries and important clothing attributes.

Table 4.16 Analysis of Variance for Country of Origin and Apparel Attributes

ANOVA ^c						
	Model	Sum of Squares	Df	Mean Square	F	Sig.
1	Regression	134.908	8	16.863	7.274	.000 ^a
	Residual	338.486	146	2.318		
	Total	473.394	154			
2	Regression	181.791	20	9.090	4.177	.000 ^b
	Residual	291.603	134	2.176		
	Total	473.394	154			

a. predictors: (constant), turkey, china, France, Japan, USA, Great Britain, Korea, Italy

b. Predictors: (constant) comfort, brand name, appropriateness, price, ease of care, fashionableness, color, good fit, styles, durability, quality, attractiveness

c. Dependent variable: Kenya

Table 4.16 shows that the p-value of 0.00 is less than 0.05. The small calculated p-value meant that the county of origin influenced the perception.

4.5.2. Attitude towards Locally Made Apparel

The study investigated the attitude towards locally made apparel and the importance of the attitude on perception. On a scale of 1 = very poor and 7 = excellent, respondents were required to indicate the importance of the locally made apparel in terms of various apparel attributes. Table 4.17 shows the study findings which indicated that the most important consideration was Good fit (mean = 5.53) and comfort (mean = 5.26). In addition, price and durability were also found to be important with means of 5.24 and 5.13, respectively. The

least preferred attributes were brand name and fashionableness with means of 4.14 and 4.53 respectively.

Table 4.17 Important Apparel Attributes

Attributes	N	Mean	Std deviation
Goodfit	267	5.53	1.694
Durability	267	5.13	1.809
Ease of care	267	4.94	1.686
Price	267	5.24	1.753
Comfort	267	5.26	1.643
Quality	267	4.90	1.836
Color	267	4.87	1.544
Attractiveness	267	4.91	1.567
Fashionableness	267	4.53	1.758
Brand name	267	4.14	4.957
Appropriateness	267	5.21	1.802
Styles	267	4.54	1.746

4.5.3 Attitude toward Foreign made Apparel

The study investigated the attitude toward foreign made apparel and the importance of the attitude on perception. On a scale of 1 = very poor and 7 = excellent, respondents were required to indicate the importance of the foreign made apparel in terms of various attributes. Table 4.18 shows the study findings which indicated that the most important consideration was quality (mean = 6.22) and durability (mean = 6.21). In addition, good fit and attractiveness were also found to be important with means of 5.94 and 5.78, respectively.

Table 4.18 Important Apparel Atributes

Attributes	N	Mean	Std deviation
Goodfit	267	5.94	1.360
Durability	267	6.21	1.134
Ease of care	267	5.44	1.542
Price	267	4.87	2.000
Comfort	267	5.65	1.427
Quality	267	6.22	1.099
Color	267	5.60	1.343
Attractiveness	267	5.78	1.268
Fashionableness	267	5.67	1.424
Brand name	267	5.62	1.452
Appropriateness	267	5.70	1.332
Styles	267	5.73	1.360

Table 4.19(a) Multiple Regression for attitudes towards locally and foreign made apparel

Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Change Statistics				
					R Square Change	F Change	df1	df2	Sig. F Change
1	.373 ^a	.139	.066	1.694	.139	1.913	12	1.E2	.037
2	.623 ^b	.389	.276	1.492	.249	4.417	12	1.E2	.000

a. predictors: (constant), styles, price, ease of care, appropriateness, good fit, brand name, color, fashionableness, quality, durability, attractiveness, comfort

b. predictors: (constant), styles, price, ease of care, appropriateness, good fit, brand name, color, fashionableness, quality, durability, attractiveness, comfort.

c. Dependent variable: Kenya

Results in Table 4.19(a) show that the locally made apparels (model 1) was statistically significant at a p-value = 0.037; whereas the foreign made apparels with p-value of 0.00 was statistically significant, where the level of significance is 0.05. The relationship obtained for the attitudes represented in Table 4.19a gave the model 1 summary with R² at 0.373. This was strong, implying that the selected independent variables were adequately explaining the changes in the dependent variable. Model 2 summaries with R² at 0.623, was

strong, implying that the selected independent variables were adequately explaining the changes in the dependent variable at 62.3% of the relationship between attitudes towards locally made apparel and foreign made apparel.

Table 4.19(b) Analysis of Variance for Attitude towards Locally and Foreign made Apparel.

ANOVA ^c					
Model	Sum of Squares	Df	Mean of Squares	F	Sig.
1 Regression	65.892	12	5.491	1.913	.037a
Residual	407.502	142	2.870		
Total	473.394	154			
2 Regression	183.921	24	7.663	3.442	.000b
Residual	289.472	130	2.227		
Total	473.394	154			

a. predictors: (constant), styles ,price, ease of care, appropriateness, good fit ,brand name, color, fashionableness, quality, durability, attractiveness, comfort

b. predictors: (constant), styles, price, ease of care, appropriateness, good fit, brand name, color, fashionableness, quality, durability, attractiveness, comfort.

c. Dependent Variable: KENYA

Table 4.19(b) shows that the p-value of 0.37 for perception of locally produced apparel is less than 0.05. The small calculated p-value meant that the attributes of locally produced apparel were perceived positively. The p-value of 0.00 for perception of foreign produced apparel is less than 0.05. The small calculated p-value meant that the attributes for imported apparel were perceived positively.

4.6 Consumer Patronage and Ethnocentric Tendencies

4.6.1 Views Regarding Consumer Patronage and Ethnocentric Tendencies

The study set to investigate consumer patronage and ethnocentric tendencies and their importance on perceptions. On a scale of 1 where 1 represents strongly disagree and 7 for strongly agree, respondents were required to indicate the importance of the statements made on apparels. Table 4.20 shows the study findings which indicated that the most important consideration was that foreign apparels should be allowed alongside Kenyan (mean = 4.82) and foreign apparels support entrepreneurship in Kenya (mean = 4.69). In addition, it pays to buy Kenyan products with a mean of 4.29 was important. Kenyan products first and foremost were also found to be important with a mean of 4.13.

Table 4.20 Views regarding customer patronage and ethnocentric tendencies

Views	N	Mean	Std. Deviation
Only products not in Kenya	267	4.21	2.385
Kenyan products first and foremost	267	4.13	2.251
Purchasing foreign products is un Kenyan	267	2.61	2.021
Foreign products put Kenyans out of jobs	267	3.28	2.149
Kenyans should buy Kenyan products	267	2.88	1.965
It Pays to buy Kenyan products	267	4.29	1.924
Foreign apparel are better than Kenyan	267	4.02	1.998
Foreign apparel should be allowed alongside Kenyan	267	4.82	1.861
Foreign apparel support entrepreneurship in Kenya	267	4.69	1.803

4.6.2 Views regarding Popularity in Sales between Western Influenced and Traditional Influenced Clothes

The respondents were required to indicate the popularity in sales between western influenced and traditional influenced clothes. They were to indicate which of the two sold better than the other. Table 4.21 displays the study findings.

Table 4.21 Best Selling Products

What Sells Best	Frequency (n=267)	Percentage (%)
Western (Imported)	211	79
Kenyan/African	56	21

According to the results in Table 4.21 the majority of the respondents (79%) said that western/imported apparel sold better while only 21% said traditional clothes/locally-produced apparel sold best. This study finding indicates that consumers in Kenya had the perception that western influenced/imported apparel sold better than Kenyan made/locally-produced apparel.

4.6.3 Views on How to Improve Kenyan Fashion

The respondents were required to state their opinion on what should be done to improve the Kenyan fashion. Table 4.22 displays the findings.

Table 4.22 Opinion on how to make Kenyan Fashion better

Variables	Frequency (n=267)	Rank
Marketing	225	1
Education	210	2
Make durable apparel	170	3
Improve on technology	129	4
Use comfortable fabrics	124	5
Make apparel affordable	119	6
Provide good quality apparel	117	7
Encourage competition	117	7
Online investment	115	8
Subsidize prices on fabrics	114	9
Improve on infrastructure	114	9
Produce original apparel products	113	10
Put heavy taxes on imports	113	10
Ban Imports	112	11

According to the results in Table 4.22, Kenyan consumers ranked marketing first in their opinions on how to improve Kenyan fashion. This was followed by education in second place. Durability of apparel was ranked third while technology was fourth. Making clothes with comfortable fabrics was ranked fifth position, followed by making them affordable in sixth place. Provision of good quality apparel and encouraging competition tied at seventh place followed by online investment in position eight. Improvement of Infrastructure and Subsidized prices tied at ninth position. The least ranked variables were a ban on imports, production of original apparel and putting heavy taxes on imports which were ranked tenth and eleventh position respectively.

4.6.4 Preferred Choice of Purchase between Local and Imported Apparel

The respondents were required to indicate their preference between imported and locally-made clothes. Table 4.23 displays the study findings.

Table 4.23 Choice of Purchase between Local and Imported Apparel

Choice of purchase	Frequency (n=267)	Percentage (%)
Local	117	44
Imported	149	56

According to the results in Table 4.23 the majority of the respondents 56 per cent preferred imported clothes while 44 per cent preferred locally-produced ones.

4.7 Testing of the Hypotheses

The study aimed at analyzing consumer perception, attitude and patronage of public servants in Kenya towards locally-produced and imported apparel. This objective was realized by answering questions in relation to four objectives, which were: To establish the attributes that professionals considered in selecting apparel; to determine the perception of

public servants towards locally-produced and imported apparel; to establish the factors that influenced the perception, preference and attitude of public servants towards locally-produced and imported apparel; and to establish the level of patronage of public servants in Nairobi on the purchase of apparel products. In order to address these objectives, four hypotheses were tested and discussed.

- **Ho₁** - There is no variation in the attributes that consumers in Kenya consider when selecting apparel.
- **Ho₂** - There is no significant difference in the perception of consumers in Kenya towards locally-produced and imported apparel.
- **Ho₃** - There is no significant difference in the factors that influence the perception, preference and attitude of consumers in Kenya in relation to apparel purchased.
- **Ho₄** - Consumer patronage has no significant effect on the purchase of either locally-produced or imported apparel in Kenya.

4.7.1 The first hypothesis was that there is no variation in the attributes that consumers in Kenya consider when selecting apparel.

Table 4.24 Hypothesis Test for Ho₁

Model	Sum of Squares	Df	Mean Squares	F	Sig.
Regression	65.892	12	5.491	1.913	.037 ^a
Residual	407.502	142	2.870		
Total	473.394	154			

a. Predictors: (constant), styles, price, ease of care, appropriateness, good fit, brand name, color, fashionableness, quality, durability, attractiveness, comfort
b. Dependent Variable: Kenya

The analysis in Table 4.24 produced a p-value of 0.037 which is less than 0.05 ($p < 0.05$) Hence the hypothesis is statistically significant. Hypothesis H_{01} , there is no variation in the attributes that consumers in Kenya consider when selecting apparel was therefore accepted.

4.7.2 The second hypothesis was that there was no significant difference in the perception of consumers in Kenya towards locally-produced and imported apparel.

This hypothesis was tested for locally-produced as well as imported apparel hence:

- i. **H_{02a}** there is no significant difference in the perception of consumers in Kenya towards locally-produced apparel.

Table 4.25(a) Hypothesis Test on difference in perception towards locally produced apparel

Model	Sum of Squares	Df	Mean Square	F	Sig.
Regression	120.743	12	10.062	4.078	.000 ^a
Residual	352.815	143	2.062		
Total	473.558	155			

a. Predictor; (Constant), styles, brand name, price, fashionableness, quality, appropriateness, good fit, color, ease of care, attractiveness, comfort, durability

b. Dependent Variable; Kenya

The analysis in Table 4.25a produced a p-value of 0.000, which is less than 0.05 ($p < 0.05$) Hence, the hypothesis is statistically significant. Sub-Hypothesis H_{02a} showed that there was no significant difference in the perception of consumers in Kenya towards locally-produced apparels and was therefore accepted.

- ii. **H_{02b}** - There is no significant difference in the perception of consumers in Kenya towards imported apparel

Table 4.25(b) Hypothesis Test on difference in perception towards imported apparel

Model	Sum of Squares	Df	Mean Squares	F	Sig.
Regression	105.870	12	8.823	2.442	.006 ^a
Residual	513.072	142	3.613		
Total	618.942	154			

a. Predictors: (constant), styles, price, durability, comfort, ease of care, brand name, good fit, fashionableness, quality, appropriateness, color, attractiveness
b. Dependent variable; foreign apparel are better than Kenyan produced apparel

The analysis in Table 4.25b produced a p-value of 0.006, ($p < 0.05$) which is less than 0.05. Hence, the hypothesis is statistically significant. Sub-Hypothesis H_{02b} proved that there is no significant difference in the perception of consumers in Kenya towards imported apparel and was therefore accepted.

4.7.3 The third hypothesis was, there is no significant difference in the factors that influence the perception, preference and attitude of consumers in Kenya in relation to apparel.

This hypothesis was tested for perception, preference and attitude of Kenyan consumers in relation to apparel. Subsequently this hypothesis is subdivided into three sub hypothesis

H_{03a}. There is no significant difference in the factors that influence the perception of consumers in Kenya in relation to apparel

H_{03b}. There is no significant difference in the factors that influence preference of consumers in Kenya in relation to apparel

H_{03c}. There is no significant difference in the factors that influence the attitude of consumers in Kenya in relation to apparel.

Regression analysis for Ho_{3a}

Ho_{3a}. There is no significant difference in the factors that influence the perception of consumers in Kenya in relation to apparel

Table 4.26(a) Hypothesis Test on the factors influencing perception of apparel consumers

Model	Sum of Squares	Df	Mean Square	F	Sig.
Regression	93.797	9	10.422	4.007	.000 ^a
Residual	379.761	146	2.601		
Total	473.558	155			

1) Predictors; (Constant), foreign apparels support entrepreneurship in Kenya, it pays to buy Kenyan products, foreign apparels are better than Kenyan, purchasing foreign products is not Kenyan, only products not in Kenya should be imported, foreign apparels should be allowed along side Kenyan, Kenyans should buy Kenyan products, Kenyan products first and foremost, foreign products puts Kenyans out of jobs

2) Dependent Variable: Kenya

Table 4.26(a) Produced a p-value of 0.000, which is less than 0.05. Hence the hypothesis is statistically significant. Sub-Hypothesis Ho_{3a} proved that there is no significant difference in the factors that influence the perception of consumers in Kenya in relation to apparel and was therefore accepted.

Regression Analysis for Sub-Hypothesis Ho_{3b}

Ho_{3b}. There is no significant difference in the factors that influence preference of consumers in Kenya in relation to apparel.

Table 4.26(b) Hypothesis Test on factors influencing preference of apparel consumers

Model	Sum of Squares	Df	Mean Square	F	Sig.
Regression	65.892	12	5.491	1.913	.037 ^a
Residual	407.502	142	2.870		
Total	473.394	154			

a. Predictors; (Constant styles, price, ease of care, appropriateness, good fit, brand name, color, fashionableness, quality, durability, attractiveness, comfort

b. Dependent Variable; Kenya

Table 4.26(b) produced a p-value of 0.037 which is less than 0.05, ($p < 0.05$). Hence the hypothesis is statistically significant. Sub-Hypothesis H_{03b} proved that there is no significant difference in the factors that influence preference of consumers in Kenya in relation to apparel and was therefore accepted

Regression analysis for sub-hypothesis H_{03c}

H_{03c} . There is no significant difference in the factors that influence the attitude of consumers in Kenya in relation to apparel

Table 4.26(c) Hypothesis Test on difference in factors influencing attitude of apparel consumers

Model	Sum of Squares	Df	Mean Square	F	Sig
Regression	120.743	12	10.062	4.078	.000 ^a
Residual	352.815	143	2.467		
Total	473.558	155			

a. predictors; (constant), styles, brand name, price, fashionableness, quality, appropriateness, good fit, color, ease of care, attractiveness, comfort, durability

b. Dependent Variable; Kenya

Table 4.26(c). Produced a p-value of 0.000, which is less than 0.05. ($p < 0.05$) Hence the objective is statistically significant. Sub-Hypothesis H_{03c} showed that there was no significant difference in the factors that influence the attitude of consumers in Kenya in relation to apparel and was therefore accepted.

4.7.4. The fourth hypothesis H_{04} Consumer patronage has no significant effect on the purchase of either locally-produced or imported apparel in Kenya was divided into two sub hypotheses:

Ho_{4a}. Consumer patronage has no significant effect on the purchase of locally-produced apparel in Kenya

Ho_{4b}. Consumer patronage has no significant effect on the purchase of imported apparel in Kenya.

Regression analysis for sub-hypotheses

Ho_{4a}. Consumer patronage has no significant effect on the purchase of locally-produced apparel in Kenya

Table 4.27(a) Hypothesis test on effect of consumer patronage on purchase of locally produced apparel

Model	Sum of Squares	Df	Mean Square	F	Sig.
Regression	72.474	12	6.039	1.580	.104 ^a
Residual	546.469	143	3.821		
Total	618.943	155			

a. Predictors; (constant), styles, brand name, price, fashionableness, quality, appropriateness, good fit, color, ease of care, attractiveness, comfort, durability

b. dependent variable; locally produced apparel are better than imported

The analysis in Table 4.27(a) produced a p-value of 0.104, which is greater than 0.05. Hence the hypothesis is statistically insignificant. Sub-Hypothesis Ho_{4a}, indicated that Consumer patronage had no significant effect on the purchase of locally-produced apparel in Kenya and was rejected.

Ho_{4b}. Consumer patronage has no significant effect on the purchase of imported apparel in Kenya

Table 4.27(b) Hypothesis test on effect of consumer patronage on imported apparel

Model	Sum of Squares	Df	Mean Squares	F	Sig
Regression	105.870	12	8.823	2.442	.006 ^a
Residual	513.072	142	3.613		
Total	618.942	154			

- a.** Predictors; (constant) Styles, Price. Durability, comfort, ease of care, brand name, good fit, fashionableness, quality, appropriateness, color, attractiveness.
- b.** Dependent variable; foreign apparel are better than Kenya

Table 4.27(b) produced a p-value of 0.006, which is less than 0.05. Hence the objective is statistically significant. Sub-Hypothesis Ho_{4b}, proved that consumer patronage has no significant effect on the purchase of imported apparel in Kenya and was therefore accepted.

Table 4.28 Summary of Hypothesis Test results

Objective	Hypothesis	Test result
1. To establish the attributes that professionals consider in selecting apparel	1. Ho₁ . There is no variation in the attributes that consumers in Kenya consider when selecting apparel	Accepted
2. To determine the factors influencing the perception of public servants towards locally-produced and imported apparel	2. Ho₂ . There is no significant difference in the perception of consumers in Kenya towards locally-produced and imported apparel Ho_{2a} . There is no significant difference in the perception of consumers in Kenya towards locally-produced apparel Ho_{2b} . There is no significant difference in the perception of consumers in Kenya towards imported apparel	Accepted Accepted
3. To determine the factors influencing perception of public servants towards locally-produced and imported apparel; in this section, the third hypothesis tested.	3. Ho₃ . There is no significant difference in the factors that influence the perception, preference and attitude of consumers in Kenya in relation to apparel Ho_{3a} . There is no significant difference in the factors that influence the perception of apparel consumers in Kenya in relation to apparel Ho_{3b} . There is no significant difference in the factors that influence preference of apparel consumers in Kenya in relation to apparel Ho_{3c} . There is no significant difference in the factors that influence the attitude of apparel consumers.	Accepted Accepted Accepted
4. To establish the effect of level of patronage on the purchase of either locally produced or imported apparel in Kenya	4. Ho₄ . Consumer patronage has no significant effect on the purchase of either locally-produced or imported apparel in Kenya Ho_{4a} . Consumer patronage has no significant effect on the purchase of imported apparel in Kenya Regression analysis for sub-hypothesis Ho_{4b} . Consumer patronage has no significant effect on the purchase of locally-produced apparel in Kenya	Rejected Accepted

CHAPTER FIVE: DISCUSSION OF FINDINGS

The purpose of this chapter was to apply the interpretation of the results from the analytical statistic techniques. Based upon Chapter 4, this chapter analyses and discusses the empirical results of this study as well as referring back to the relevant literature review for comparison with the findings.

The findings of this study indicate that the respondents obtained information from families/relatives/friends and did their shopping locally in Kenya.

When making purchase decisions for apparel, Kenyan consumers considered fit as the most important attribute with quality and price as being the second and the third most important attribute (Table 4.11). For fit and price, a similar result was found in Sirirat Sae - Jiu (2007) study. The researcher noted that fit, style, look and price are the four most important attributes assessed when shopping. Besides, other researches also supported that price is the attribute most frequently used by consumers in evaluating the value of an apparel product (Eckman *et al.*, 1990; Forsythe *et al.*, 1999). More significantly, price can be important for the respondents of this study since majority of them earned Kshs 30,000.00 per month or less (Table 4.4). Accordingly, the respondents had to be careful when spending money.

Relative to other product attributes, brand name and country-of-origin were generally of low importance. The present study shows that for Kenyan consumers, brand name was not as significant as other attributes, particularly those of fit, price and quality (Table 4.14). Similarly, Sirirat Sae - Jiu (2007), also found that brand/label of apparel was last in rank in their survey on consumer perception of the attribute importance. When considering only country-of-origin, the majority of Kenyan respondents indicated that they still paid attention

to made-in label. These findings are supported by several authors' i.e. Piron (2000) believed, COO effects will remain and always color consumer's attitudes toward brands, but the effects are neither as important nor as powerful as in the past. Also, as stated by Kaynak *et al.* (2000), country-of-origin will hold its importance in developing countries for a long time. Moreover, Usunier (2006) posited that if consumers are aware of the manufacturing origins, they tend to consider the origin information in conjunction with a number of other information cues.

These study findings confirmed the preferred country of origin was Japan followed by America while china and Kenya were ranked third (Table 4.10). This study finding is in line with findings by Agbonifoh and Elimimian (1999); Ogunnaike (2010) in Nigeria, as well as studies in Ghana by Opoku and Akorli (2009), who showed that products from technologically advanced countries were viewed more positively by nationals of developing countries than those from the less advanced countries. The Kenyan respondents expressed their preference of apparel's country-of-origin as follows: Japan, America, Kenya, China, Turkey, France, Italy, Korea and Britain.

In term of quality, apparel made in France and Italy were rated as having highest quality, followed by USA, Britain, Turkey, Kenya Japan, Korea and, lastly, China. These results show that Kenyan consumers tended to prefer apparel from western origins more than eastern origins. One factor that may affect their choice is the perception of quality. As suggested by Wang and Chen (2004), as well as Wang and Lamp (1983), consumers in a developing country (of which Kenya is one), tend to have preference for products originating in higher technologically and economically-advanced countries, if they judge the quality as better than that of products produced in a less-developed country. Opoku &

Akorli (2009), also found that products from developing and less-developed countries were rated lower on quality regardless of brand name. These suggestions correspond with the results of this study that shows that the respondents judged the quality of apparel from western origin as being higher than that from the eastern regions. On the other hand, these results showed that country-of-origin may act as a surrogate of quality.

The study findings indicate that, Kenya was perceived to have better quality of fashion clothing than China, Japan and Korea (Table 4.12). These study findings confirmed that the respondent's perception of the fashion industry in Kenya was that the industry was growing although not well exposed and should emphasize on comfortability and durability of products (Table 4.13). Literature reviewed elsewhere in this study confirms that consumers can evaluate a product along several levels (Section 2.1). This study is in line with the findings by Leon & Kanuk (2007), who conclude that consumers analyze a product along two kinds of variables: intrinsic variables such as price, brand, warranty and country of origin, and extrinsic variables such as culture, reference groups, lifestyle and personality. This view is supported by that of Opoku & Akorli (2009), who conclude that this stereotyping is due to attitudes towards the people of a given country and familiarity with the country.

Consumer attitude towards domestic apparel and consumer attitude towards foreign apparel exhibited statistically significant differences (Table 4.19). Kenyan consumers appeared to have an overall more positive attitude towards foreign apparel than domestic one. There are six apparel attributes that the respondents gave higher evaluations for foreign-made apparel, namely: quality, durability, good fit, attractiveness, fashionableness and brand name, implying that Kenyan consumers were in favor of imported apparel over domestic apparel

for these attributes. When ranking in an order of mean differences (from most different to least different), consumers considered foreign apparel to be more desirable in the following manners: better brand name recognition, better quality, more durable, more fashionable, more attractive, and more comfortable. On the contrary, Kenyan consumers reported that domestic apparel had better fit, more durable, more comfortable, had better price, and were more appropriate in occasion than imported apparel.

The study findings show that the attitude of respondents towards domestic made apparels was that good fit and comfortability had the highest consideration (Table 4.17) while attitude towards foreign made apparels was quality and durability (Table 4.18). This study finding confirms that by Uggla (2001) who attests that quality is an integral part of brand identity. The study also confirms that of McDonald and Sharp (2000), who say that, price can be used as a basis for apparel choice in two ways; going for the lowest price in order to escape financial risk or the highest price in order to achieve product quality. Chen & Ko, (2007), also claim that these attributes can lead to satisfaction and concludes that customer satisfaction is one of the key factors in modern marketing. If the customers are satisfied with the provided goods, the probability that they would buy the goods again increases.

Comparing this study to Wang and Heitmeyer (2006), even though the respondents were from a different country, the findings from this research supports their study that indicated Taiwanese consumers thought foreign-made clothing (i.e. US-made) was better than Taiwanese-made clothing in the attributes of care instruction label, color, quality, apparel fiber content, fashionableness, attractiveness, brand name and comfort. Except for care instruction label, color, and fiber content, the study shows Kenyan as with Taiwanese consumers, felt that foreign apparel was higher on the above listed qualities.

According to these study findings the popularity in sales between imported apparel and locally-produced apparel was that imported apparel sold better than locally-produced (Table 4.21). However, the opinion on what should be done to improve on Kenyan fashion was that marketing and educating customers' about traditional apparels was necessary and that making clothes comfortable to sell better was important (Table 4.22). This patriotic viewpoint is supported by among other empirical studies, Durvasula, Andrews, and Netemeyer (1997), who state that ethnocentric individuals have a strong positive attitude towards their own country. On the other hand, Balabanis and Diamantopoulos (2004), found that ethnocentric consumers can define their positive intention towards domestic products better than their negative intentions towards imported products. Sumner (1906) also claimed that Ethnocentrism implies that purchasing imports is wrong, not only because it is unpatriotic, but also because it is detrimental to the economy and results in loss of jobs in industries threatened by imports, as is the case in Kenya.

CHAPTER SIX: SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

6.1 Introduction

This section contains a summary of the study findings. It also presents the conclusions arrived at and the study limitations and impediments. The last part of this chapter contains recommendations for future research and implications for policy and practice.

6.2 Summary of the Study

This study sought to achieve the various objectives as earlier outlined in section 1.4.

In order to address these objectives, four hypotheses (section 1.5) were tested and discussed (section 4.7). The test of hypotheses yielded significant results where all hypotheses were accepted except one (Table 4.28). In summary, in a purchase decision, the three most important apparel attributes for Kenyan consumers were fit, quality and price whereas brand name and country of-origin were of least importance in terms of attributes. However, there was evidence that Kenyan consumers still paid attention to country-of-origin, although it ranked lowest.

For information search, Kenyan consumers obtained purchase information from families/relatives/friends and they did their shopping locally. This may influence the choice of where the consumers purchased their apparel and whether they chose to buy locally produced or imported apparel.

Generally, Kenyan consumers had a more positive attitude towards imported apparel over domestic apparel. They perceived the attributes of durability, quality, attractiveness, fashionableness, brand name, and choice of styles of foreign apparels as being better than those of Kenyan-made. The three most preferred country-of-origin of apparel for Kenyan consumers were Japan, USA and China/Kenya. Apparels made in these countries were also rated as having highest quality.

For ethnocentrism, it can be concluded that, in a developing country, such as Kenya, where people normally had a more positive attitude towards foreign apparel, consumer ethnocentrism would only have positive effect on consumer attitude towards domestic apparel, but would not have negative effect on consumer attitude towards foreign apparel.

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6.3 Conclusions

In a global marketplace, target consumers are exposed to a wide array of products and have to choose from a massive range of locally-produced versus imported products and brands than ever before. This is attributable to the decrease on trade barriers, the development of communication and transportation technologies, increased global competition, coupled with the increased standards of living and improved lifestyles of consumers around the globe. Accordingly, there is a growing need for marketing practitioners to understand the dynamics that affect consumers' evaluations of imported products over domestic ones, in cross-national and cross-cultural settings (Kaynak and Kara 2002; Knight, 1999; Kucukemiroglu, 1999).

The recent trend in economic power has changed. Though advanced economies were the foremost engines of global economic growth over the last 50 years, nowadays developing

and transition economies offer the next great opportunities (Hill 2007; Klein *et al.*, 2006). Hence, the need for global managers to establish a comprehensive understanding about attitudes of consumers in developing and transition economies toward imported products (Klein *et al.*, 2006).

Consumers are essentially the decision makers and have a remarkable impact on product selection (Sibble, 2003). This study was designed to investigate perception, attitude and patronage of consumers toward buying locally-produced versus imported apparel in the context of a developing country, Kenya.

According to the findings of this study, it is clear that there is no variation in the attributes that consumers in Kenya consider when selecting apparel. The study finding indicates that the respondents did not spend a lot on clothing. However the attributes the professionals considered in selecting apparel were more or less the same for both locally made and imported apparel.

Consumer attitude towards Kenyan-made and imported apparel had no significant difference. Consumers in Kenya generally had an overall more positive attitude towards imported apparel. They considered foreign apparel superior to Kenyan-made apparel with regard to durability, quality, attractiveness, fashionableness, brand name, and choice of styles. For Kenyan consumers' positive attitudes toward locally made apparel, the influence was based on fit, ease of care, price, comfort and choice of colors. Interestingly, there was no significant difference found in consumer attitudes based upon demographic variables.

In conclusion, the study findings indicate that there is no significant difference in the perception of consumers in Kenya towards locally-produced and imported apparel. According to the findings both locally produced and imported apparel are perceived in more or less the same standards. Consumers' positive and negative attitude towards imported apparel attributes can be used to develop a marketing strategy for Kenyan companies (Wang and Heitmeyer 2006). Kenyan companies should improve the durability and styles of their apparel to be more attractive and fashionable so as to give the imported apparel a run for their money. More significantly, they should improve the quality level, emphasize more on brand name, and pricing of their product.

Kenyan consumers had a higher tendency to purchase apparel products coming from technologically developed countries than developing and less developed countries. This holds true in that the preferred countries in terms of quality were France, America and Italy. Consumer patronage had no significant effect on the purchase of imported apparel in Kenya. This fact holds true based on the amount of money the respondents spend on clothing.

There is a need for product differentiation by clothing manufacturers to enable the Kenyan consumers has a variety of items to choose from.

6.4 Recommendations for policy and practice

In the light of the findings of this study, various recommendations could be made in relation to policy and practice.

Manufacturers of local apparel should improve on quality and other characteristics like durability, ease of care and style, so as to satisfy the local demand and preferences. Some of the key support systems are communication, product differentiation, and strategic alliances with foreign apparel manufacturers and marketers. The Kenyan manufacturers should be able to advertise their products locally to enable consumers to be aware of the kind of apparel they produce. From the study results, it was apparent that the respondents lacked knowledge on locally produced apparel in the market.

Government needs to ban the importation of foreign made products if the Kenyan market can be satisfied by existing local manufactures. The ban on the importation of these products should be followed with a ban on their consumption. Where a product is banned for any reason, government should ensure that restrictive business practices do not develop within that industry. In particular, there should be no collusion on pricing zoning of markets, or artificial barriers to entry of new firms.

Kenyan companies, need to improve the durability and styles of their apparel to be more attractive and fashionable. More significantly, they should improve the quality level, emphasize more on brand name, and make the prices of their products competitive.

As Kenyan consumers exhibited a high degree of ethnocentrism, domestic marketing managers need to take advantage of prevalent ethnocentric tendencies by promoting the native image (Shimp and Sharma, 1987). This can be used as a strategy to keep international competitors at bay (Shankarmahesh, 2006). Strong brands and a local country-of-origin can be very attractive to high ethnocentric consumers.

Clothing manufacturers in Kenya need to embark on an elaborate Strength, Weaknesses Opportunities and Threats (SWOT) analysis programme, which will ensure that they are able to deal with the competition from imported clothes. Following the publication of the import act in Kenya (GOK, 2006), the Textile industry should impress on the government for the need to establish an enabling legal and regulatory environment, that can encourage the manufacturers to compete favorably especially with the importers of used clothing.

The Kenya bureau of standards (KEBS) needs to intensify efforts to prescribe and enforce minimum standards for our local products. Therefore, if the above mentioned, among other recommendations are judiciously implemented by both the manufacturers and the government, it will go a long way in ensuring more patronage of Kenyan made goods.

6.6 Recommendations for Further research

A similar study can be done in different sectors of the economy in Kenya. This study also recommends that a further study be done to determine the potential and future effects of consumer patronage and attitudes on the performance of the economy.

This study recommends that a survey be carried out on the attitude of patrons towards the quality of apparels from Kenya. This will help to infer on the exact qualities and attitudes that are inherent among consumers in Kenya.

Fashion apparel has a short life cycle. Hence, exploring the demand cycle might attract researchers to this area. The demand projections can be developed through econometric modeling as well as by analyzing the judgments obtained from purchase managers or other company experts.

In addition, research on E-retailing of fashion apparel and accessories also appears to be a promising subject. E-retailing not only presents a fresh channel to market for existing players, but also enables a cost-effective route to fashion marketing for apparel as well as fashion accessories.

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APPENDIX A: COVER LETTER

AYTSO CAROLINE NYARUNDA
KENYATTA UNIVERSITY
P. O. BOX 43844-00100
NAIROBI, KENYA.
25 June 2012

TO WHOM IT MAY CONCERN

Dear Sir/ Madam,

RE: RESEARCH PROJECT

I am a post-graduate student at Kenyatta University in the Department of Fashion, Design and Marketing. My research topic is “**consumer perceptions, attitude and patronage towards purchase of domestic versus imported apparel in Nairobi County- Kenya**”. This questionnaire seeks to determine consumer perceptions, attitudes and patronage towards locally produced and imported textiles and apparels in Kenya. It is hoped that the findings will be useful in achieving vision 2030. Your response to the questionnaire will be treated with utmost confidentiality and anonymity. Please spare a little of your time to read this questionnaire and respond to the questions. Thanks for your co-operation.

Yours faithfully,

AYTSO CAROLINE NYARUNDA.

APPENDIX B: QUESTIONNAIRE

This questionnaire is purely for academic research for the completion of the dissertation. It is designed to investigate the factors which influence Kenyan consumers' perception, attitude and patronage towards purchase of foreign versus domestic apparel products. There is no correct or incorrect answer for each question. Therefore, please answer as honestly as possible to the best of your knowledge. All information provided will be treated with anonymity and confidentiality. The survey result will strictly be used for academic purposes only.

Section A: Personal Information

Instruction: For each of the following statements, please circle the response that is applicable.

1. Gender: (a.) Male (b.) Female

2. Age: (a.) 25- 30 years (b.) 31 – 35 years (c.) 36 – 40 years (d.)
41- 45 years (e) 45 years and above

3. Estimated monthly income in Kenya shillings: (a.) 30,000 or less (b.) 30,001 – 40,000 (c.) 40,001 – 50,000 (d.) 50,001 – 60,000 (e.) 60,001 – 70,000 (f.) Over 70,000

- 4 On average, how much money do you spend each month for your own clothes generally (in Kshs)?
(a.) Less than 5,000 (b.) 5,001 – 10,000 (c.) 10,001 – 15,000

(d.) 15,001 – 20,000 (e.) 20,001 – 25,000 (f.) Over 25,000

5. On average, how many times do you go shopping for fashion clothing each month?

(a.) Occasionally (b) Once a month (c) Two times a month (d) Three times a month

(e) Four times a month (f) Five times a month (g) Over five times a month

6. Where do you obtain information about fashion clothing before shopping?

(a.) Family/Relative/Friend (b.) Salesperson (c.) Magazine (d.) Television

(e.) Websites (f.) Others (Specify) _____

7. Where do you normally do your shopping for clothes? (Please specify)

(a.) In Kenya (b.) Out of Kenya (c) Online

8. Give reasons for the above answer

Section B: Country of Origin

Instruction: For each of the following statements, please circle the response that is applicable.

9. How often do you check the made-in label when shopping clothing?

(a.) Every time (b.) Most of the time (c.) Sometimes (d.) Rarely (e.) Never

10. What is your preferred country-of-origin of fashion clothing? Please rank them in order from 1 = the most preferred to 9 = the least preferred.

(a.) Japan _____ (b.) Britain _____ (c.) Korea _____ (d.) France _____

(e.) Kenya _____ (f.) Italy _____ (g.) America _____ (h.) China _____

(i.) Turkey

(j.) Other please specify _____

11. Give reasons why you prefer the country – of –origin you have chosen in question 10 above.

12. Please rate your perception of the quality of fashion clothing from the following countries (**1 = Low Quality to 7 = High Quality**).

No.	Country	Quality						
a.	Kenya	1	2	3	4	5	6	7
b.	United States of America	1	2	3	4	5	6	7
c.	China	1	2	3	4	5	6	7
d.	Japan	1	2	3	4	5	6	7
e.	Italy	1	2	3	4	5	6	7
f.	France	1	2	3	4	5	6	7
g.	Britain	1	2	3	4	5	6	7
h.	Korea	1	2	3	4	5	6	7
i.	Turkey	1	2	3	4	5	6	7
j.	Other (Specify)	1	2	3	4	5	6	7

13. What is your perception of the fashion industry in Kenya?

Section C: Attitude towards Domestic-made versus Foreign-made Clothing

Instruction: For each of the following questions, please circle the response that indicates your attitude when shopping for clothing.

14. How do you consider the following attributes when shopping for apparel?

1 = Least Important; and 7 = Very Important.

No.	Attribute	Importance						
		1	2	3	4	5	6	7
a.	Good fit	1	2	3	4	5	6	7
b.	Durability	1	2	3	4	5	6	7
c.	Ease of care	1	2	3	4	5	6	7
d.	Price	1	2	3	4	5	6	7
e.	Comfort	1	2	3	4	5	6	7
f.	Quality	1	2	3	4	5	6	7
g.	Color	1	2	3	4	5	6	7
h.	Attractiveness	1	2	3	4	5	6	7
i.	Fashionableness	1	2	3	4	5	6	7
j.	Brand name	1	2	3	4	5	6	7
k.	Appropriateness for occasion	1	2	3	4	5	6	7
l.	Styles	1	2	3	4	5	6	7
m.	Other .specify	1	2	3	4	5	6	7

15. What is your attitude towards domestic made apparel in terms of the following attributes? **1 = Very poor** and **7 = Excellent**

No.	Attribute	Rating						
		1	2	3	4	5	6	7
a.	Good fit	1	2	3	4	5	6	7
b.	Durability	1	2	3	4	5	6	7
c.	Ease of care	1	2	3	4	5	6	7
d.	Price	1	2	3	4	5	6	7
e.	Comfort	1	2	3	4	5	6	7
f.	Quality	1	2	3	4	5	6	7
g.	Color	1	2	3	4	5	6	7

h.	Attractiveness	1	2	3	4	5	6	7
i.	Fashionableness	1	2	3	4	5	6	7
j.	Brand name	1	2	3	4	5	6	7
k.	Appropriateness for occasion	1	2	3	4	5	6	7
l.	Styles	1	2	3	4	5	6	7
m.	Other. Specify	1	2	3	4	5	6	7

What is your attitude towards foreign made apparel in terms of the following attributes? **1 = Very poor** and **7 = Excellent**

No.	Attribute	Rating						
		1	2	3	4	5	6	7
a.	Good fit	1	2	3	4	5	6	7
b.	Durability	1	2	3	4	5	6	7
c.	Ease of care	1	2	3	4	5	6	7
d.	Price	1	2	3	4	5	6	7
e.	Comfort	1	2	3	4	5	6	7
f.	Quality	1	2	3	4	5	6	7
g.	Color	1	2	3	4	5	6	7
h.	Attractiveness	1	2	3	4	5	6	7
i.	Fashionableness	1	2	3	4	5	6	7
j.	Brand name	1	2	3	4	5	6	7
k.	Appropriateness for occasion	1	2	3	4	5	6	7
l.	Styles	1	2	3	4	5	6	7
m.	Other. (Specify)	1	2	3	4	5	6	7

Section D: Consumer Patronage and Ethnocentric Tendencies

17. What are your views regarding the following statements? Please respond by choosing among 1 – 7 where **1 = represents strongly Disagree** and **7 = for strongly Agree**.

No.	Statement	Rating						
		1	2	3	4	5	6	7
a.	Only products not available in Kenya should be imported.							
b.	Kenyan products first and foremost.							
c.	Purchasing foreign-made products is un-Kenyan.							
d.	It is not right to purchase foreign-made products because it puts Kenyans out of jobs.							
e.	A Kenyan should always buy Kenyan made products.							
f.	It pays to buy Kenyan products in the long run							
g.	Foreign made apparels are better than the Kenyan made apparels.							
h.	Foreign made apparels should be allowed to be sold alongside Kenyan made apparels							
i.	Foreign made apparels support entrepreneurship in Kenya							

What do you think sells the best among the general Kenyan buyer; Clothes with western influences or clothes with traditional Kenyan/African influences?

How can **Kenyan fashion** be better **established** on the Kenyan market?

Given a choice between domestic and imported apparel what would you purchase?

Give reasons for your answer.

Thank you for your valuable time and cooperation.

APPENDIX C: KREGCIE AND MORGAN SAMPLING TABLE

TABLE FOR DETERMINING SAMPLE SIZE FROM A GIVEN POPULATION

N	S	N	S	N	S	N	S	N	S
10	10	100	80	280	162	800	260	2800	338
15	14	110	86	290	165	850	265	3000	341
20	19	120	92	300	169	900	269	3500	246
25	24	130	97	320	175	950	274	4000	351
30	28	140	103	340	181	1000	278	4500	351
35	32	150	108	360	186	1100	285	5000	357
40	36	160	113	380	181	1200	291	6000	361
45	40	180	118	400	196	1300	297	7000	364
50	44	190	123	420	201	1400	302	8000	367
55	48	200	127	440	205	1500	306	9000	368
60	52	210	132	460	210	1600	310	10000	373
65	56	220	136	480	214	1700	313	15000	375
70	59	230	140	500	217	1800	317	20000	377
75	63	240	144	550	225	1900	320	30000	379
80	66	250	148	600	234	2000	322	40000	380
85	70	260	152	650	242	2200	327	50000	381
90	73	270	155	700	248	2400	331	75000	382
95	76	270	159	750	256	2600	335	100000	384

Note: "N" is population size

"S" is sample size.

Krejcie, Morgan, (1970) Pp104-106

Occasion
Brand name
Care instructions
Choice of style
Suitability
Quality
Pleasing others
Others.specify

Thank you for your co-operation.

APPENDIX E: RESEARCH PERMIT



NATIONAL COMMISSION FOR SCIENCE, TECHNOLOGY AND INNOVATION

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NAIROBI-KENYA

Ref: No.

Date:
7th March, 2014

NACOSTI/P/14/8368/434

Caroline Aytso Nyarunda
Kenyatta University
P.O.Box 43844-00100
NAIROBI.

RE: RESEARCH AUTHORIZATION

Following your application for authority to carry out research on *“Consumer perception attitude and patronage towards purchase of imported versus locally produced apparel in Nairobi County,”* I am pleased to inform you that you have been authorized to undertake research in **Nairobi County** for a period ending **27th November, 2014**.

You are advised to report to **the County Commissioner and the County Director of Education, Nairobi County** before embarking on the research project.

On completion of the research, you are expected to submit **two hard copies and one soft copy in pdf** of the research report/thesis to our office.

DR. M. K. RUGUTT, PhD, HSC.
FOR: SECRETARY/CEO

Copy to:

The County Commissioner
The County Director of Education
Nairobi County.



