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Country of Origin Impact on Consumer Perception of Value in Fast Fashion

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COUNTRY OF ORIGIN IMPACT ON CONSUMER

PERCEPTION OF VALUE IN FAST FASHION

by

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With fast fashion growing rapidly, insight onto consumers perception of the value for the country of origin in this sector of the retail industry is a topic that needs to be delved into deeper. While there are studies over the impact of country of origin and fast fashion separately, the correlation between these two dimensions has yet to be reviewed. The purpose of this study is to identify consumers perception of the overall value of fast fashion merchandise based on country of origin. Through a questionnaire, participants were asked open and closed-ended questions about specific factors of value based on country of origin in apparel products. These factors included perceived innovativeness, willingness to buy, perceived price, country familiarity, and quality. Through Amazon Mechanical Turk, participants were recruited to take this virtual survey. Because of the popularity of fast fashion with Millennials and their growing purchasing power, the outcomes of this study are tailored to this generation. The implications of this study can be used throughout the retail and fashion industries. When decisions of outsourcing or insourcing products are being made, understanding how the country of origin impacts their perception of value will provide critical information companies and brands in all retail sectors can use.

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CHAPTER 1: INTRODUCTION

Fast fashion is a growing revolution in the fashion industry, continuing to impact consumers and employees in the retail and fashion industry alike. Unlike contributing to fashion's two major seasons, fast fashion retailers provide new merchandise to consumers weekly. Companies such as Zara, H&M, and Forever 21 are leaders in the fast fashion industry, continuing to offer thousands of products to consumers through online and brick and mortar stores (Loeb, 2015).

For fast fashion retailers, offering thousands of products at low prices with quick turnaround times provides major benefits. For companies such as Zara, replenishment and markdowns are no longer as big of a task. With bringing in the new product, companies now can focus on offering new merchandise to consumers, which takes place of having to restock older merchandise that has sold out (Loeb, 2015). Consumers also reap the benefits of lower prices and new merchandise to choose from at a rapid pace.

These growths of fast fashion in the United States and Europe have impacted the global industry. After working with China, many fast fashion retailers have shifted to lower-cost manufacturing centers in countries such as Vietnam and Bangladesh (Bédat, 2015). These centers offer lower end machinery to produce the product and do not have the correct trained leadership to demand higher wages. In return, companies such as H&M and Forever 21 are able to create low priced, high quantity merchandise for consumers rapidly (Fast Fashion, 2016). In contrast, Zara has been able to keep manufacturing in the UK and USA. Although they have to pay more in cost, they are able to avoid longer wait times between the design and distribution in

stores due to shipping and working with individuals further from their headquarters (Cachon & Swinney, 2011).

Fast fashion history. Beginning in the 1980s, the quick response needed to meet consumer demand developed in the US. Fast fashion started in the late 1990s and early 2000s and has since become a widespread division of the retail industry (Fast Fashion, 2016). Fast fashion has been a key component in the rise of consumer intake of clothing, as well as moving domestic production to cheaper overseas options. Typical fast fashion apparel items are known for not being of "lifetime" quality, but are on trend and are more affordable for the average consumer (Fast Fashion, 2016).

Some elements to consider when determining if a product is "fast fashion" are price, manufacturing timeline, availability, trend-based and disposability (Fast Fashion, 2016). Fast fashion companies are to have the best prices and be able to compete with each other in certain aspects. For instance, Zara, H&M and Forever 21 sell their denim pants starting from $12.90 all the way to $69. While Forever 21 has the lowest retailed price jeans, it is also notable that the $69 pair of denim at Zara can be seen as a good deal in comparison to many other competitors (Fast Fashion, 2016).

Manufacturing and availability are key components of what makes a company a fast fashion retailer. Like stated before, the typical designer or fashion company will have two fashion seasons they are involved in. Fast fashion can manufacture and distribute products as fast as two weeks, many having new garments and accessories in their stores every four to six weeks. This rapid speed is what gives the name "fast fashion" to these retailers. The rapid delivery speeds give these companies a cutting edge over the competition, as some are not able to provide to their

consumers as often (Fast Fashion, 2016). Being trend-based, fast fashion retailers have products that are most on trend at the moment, as many designs are being derived from the latest runway shows. Online fast fashion retailers, such as Fashion Nova, have been known to have knockoff products available for pre-order or join waitlists to known when the garment will be ready to buy within 24 hours of socialites or celebrities wearing the product. This method of copying high-end produced goods poses threats to the industry, as many times the high-end or original garments that are being copied have not been available to consumers before fast fashion retailers have the item available (Fast Fashion, 2016).

Because of how quickly products are available and how quickly trends fade, fast fashion retailers know that their merchandise must be disposable. While many people may have "basic" products such as a plain pair of denim, black pants, or t-shirts, fashion products will come and go with the trends and retailers need to stay on top of these consumer preferences. Consumers who partake in fast fashion trends are known for wearing the item once or twice before being ready to move on to the next trend (Fast Fashion, 2016).

Global effect. Among many developing countries, India, Cambodia, Vietnam, Indonesia, and Turkey are popular countries for manufacturing factories (Fast Fashion, 2016). Although labor is cheap in these areas, the impact on its workers and communities is widely known. In 2013, the Rana Plaza factory in Bangladesh that housed workers for fast fashion retailer Primark collapsed, killing over 1,100 people. This devastating situation led to retailers and the Bangladesh government to promise reforms in order to better the conditions that workers face each day (Burke, 2015). Retailers set up two consortia themselves, including the *Accord on Fire and*

Building Safety and the *Alliance for Bangladesh Worker Safety*. These were to help guide inspections of factories and help local employers fund structural improvements (Burke, 2015).

With some promises and changes made, Bangladesh's government aimed to help increase the number of unions. Although this initiative was put in place, workers who formed unions are being treated wrongfully, as some are faced with abuse threats, intimidation, dismissal, and sometimes physical assault by managers or hired thugs (Burke, 2015). Through interviewing more than 160 garment workers in surrounding areas or in Dhaka who supply for companies based in the US, UK, and Australia, complaints of physical assault, verbal abuse, forced overtime, unsanitary conditions, denial of paid maternity leave, and failure to pay wages on time or in full were heard (Burke, 2015).

Hasan Ashraf, a Bangladeshi anthropologist, conducted six months of fieldwork at a Dhaka factory and was able to discuss the findings of everyday health risks the workers were exposed to. In the factories, workers inhaled dust and smoke due to lack of ventilation. Factories were often noisy, with exposure to lights, electric wires, and chemical adhesives (Neve & Prentice, 2017). Many workers were forced to choose between making a living or caring for themselves, in which many would choose to work, leaving them with eyestrain, musculoskeletal pain and stress. Similar to Bangladesh factories, reports on Cambodia factories also include workers fainting, in part, caused by exhaustion, overheating, and malnutrition (Neve & Prentice, 2017).

Dr. Rebecca Prentice, Senior Lecturer in Anthropology at the University of Sussex, conducted research to determine what factory workers were experiencing daily. The Delhi capital region reported 10 to 12-hour work days for 67% of workers, 39% experiencing strained

eyes and 41% experiencing exhaustion (University of Sussex, 2017). Fellow Professor of Anthropology at the University of Sussex, Dr. Geert De Neve noted that improvements have been made since the disaster at Rana Plaza and Tazreen, but initiatives have not gone far enough. Codes of conduct have been poorly implemented and the health and well-being of workers is still a threat to their daily lives in the result of their working conditions (University of Sussex, 2017).

Fast fashion around the world. With the main benefit of outsourcing from developing countries being cheap labor, consumers typically can expect the higher price tag on a "Made in the USA" label. American Apparel, a well-known company based and sourced in the USA filed for bankruptcy after struggling to keep up with costs in the ever-changing retail industry. The higher wages that come with manufacturing in the US and the management costs of the "Made in the USA" came at a price. Although consumers can view this as more ethical or politically correct, the expensive price is hard to maintain for retailers (Sharma, 2016).

Major retailers today use manufacturing factories from all over the world, including developing countries such as Turkey, India, Sir Lanka and Bangladesh (Tokatli et al., 2008). Issues at hand with global sourcing begin with the poor treatment at the factories, inadequate working conditions, and corporate personnel responsible for creating guidelines for owners and managers of these factories to enforce (Tokatli et al., 2008). These factors are considered when determining an image of a country and the perceived quality of a product manufactured in them.

Fast fashion revenue. Although some fast fashion retailers are privately own companies, public companies highlight the success in this sector of the industry. The top four fast fashion retailers, Zara, H&M, Gap and Uniqlo, had total revenue of $85.6 billion in 2018 (Olanubi, 2018). Zara had the highest revenue at $28.8 billion, followed by H&M at $22.7 billion. Uniqlo and Gap

brands had $18.2 billion and $15.9 billion respectfully (Olanubi, 2018).). Fashion Nova's CEO Richard Saghian has not shared specifics on the company's revenue, however, some sites suggest nearly $490 million in 2018 (Hughes, 2018). Forever 21 is also a leading fast fashion retailer, however, as a private company their revenue is unknown to the public. In addition to fast fashion, off-price and discount retailers are contributing high amounts of revenue in annual sales as well, with the TJX companies bringing in $31 billion in 2015. With this amount of revenue, it is not surprising that fashion is the most labor-intensive industry in the world, with 1-in-6 people involved worldwide (Sharma, 2016).

In 2018, worldwide revenue in the fashion industry was reported at $481.2 billion (Orendorff, 2019). Revenue in the fashion industry is expected to reach $712.9 billion by 2022 (Orendorff, 2019).   With the revenue from the top four fast fashion companies at $85.6 billion, fast fashion is at least 18% of total revenue of the fashion industry. With this growth in the fashion industry, threats to establishing brands come from fast fashion's ability to create and release styles on demand, therefore, a rise in fast fashion can be expected in coming years.

Fast fashion made in America. While sourcing products, materials and finished products from countries outside of the United States is most popular, some fast fashion and retailers still use manufacturers in the United States. Fast fashion retailer H&M has one manufacturer located in the United States (H&M, n.d.). Fashionnova works with more than 1,000 manufacturers. In the summer months, 80 percent are made in the USA, which allow for their quick turnaround time on products. In the colder months, 80 percent are made overseas (Hughes, 2018). Uniqulo currently manufactures in China and other Asian countries (Uniqlo, n.d.). Forever 21 works with independent Southern California factories for some of their merchandise. Although these

factories are in the United States, they have been found to pay workers much less than the minimum wage, around $4 an hour (Kitroeff, 2016). The investigation led to 77 factories being found of underpaying workers by $1.1 million from April to July. Retailers using these factories are able to avoid penalized by not working directly with the workers, instead, multiple layers of suppliers (Kitroeff, 2016).

American made fast fashion products are difficult to come by, as 97% of garments that are sold in the United States are made elsewhere (Uranga, 2017). American Apparel was known for their "Made in America – Sweatshop Free" logo, but not being able to adapt to the demands of fast fashion like other retailers, American Apparel filed for bankruptcy. After filing for bankruptcy in 2015 they were acquired by Gildan Activewear in 2017 (Robertson, 2017) As a well-known retailer that sourced out of the United States, the failure of this company shows the impact that fast fashion has on apparel retailers and brands.

Economic impact. Fast fashion has made quite an impact on the US and other developed nations across the world. The US can see the changes in how much the industry has grown to outsource over the course of time. In the 1960s, 95% of clothing in America was made in the United States (Sharma, 2016). Today that 95% has become only 3%, with 97% being outsourced. While some may offshore to other developed countries, many are choosing to take the cheaper options such as Bangladesh, India, Cambodia, Chinese and Vietnam (Sharma, 2016).

These developing countries are popular because of their low wages, less stringent local labor laws, and agreements of free trade. The people making these products are most affected by these laws and agreements, as many workers are women who are left without health benefits or financial security. In addition to no benefits provided to the workers themselves, the pay is very

low (Sharma, 2016). An average worker makes about $67 a month, making their daily pay a little over $2 (Sharma, 2016). This low pay requires them to work long hours without breaks to provide for themselves and their families. While COO is an important factor to some consumers when determining where and what to buy, in a Gallup poll from 2013, it was found that over 55% of US consumers surveyed make no efforts in knowing where their clothing came from (Sharma, 2016).

Fast fashion future. Retailers are finding the trend of fast fashion hard to maintain. H&M is a global leader in the fast fashion market had $4 billion of inventory, which led to major discounts on products to clear the merchandise out. With this, they began closing stores, starting with 160 brick-and-mortar locations. In addition, popular fast-fashion retailer Charlotte Russe filed for bankruptcy and has begun closing locations after closing their online website (Stein, 2019).

New retailers are making a difference in how fast fashion sells in past years. The use of social media has made companies like Boohoo, ASOS, and Fashion Nova some of the most sought-after fast fashion brands in 2018, with Fashion Nova being the most searched retailer in 2018 (Stein, 2019). Centering their platforms mainly online with limited brick-and-mortar stores, these retailers have successfully worked up large inventories that are selling. For example, Fashion Nova has been providing consumers with 600-900 new items weekly (Stein, 2019).

Social media, celebrity and highly followed influencers, discounts and large assortments are strategies in which these companies have used to raise brand awareness and make purchases (Stein, 2019). Using popular celebrities, brand ambassadors and offering discount codes through their social media platforms, companies like Fashion Nova can use this marketing technique to

reach a mass of followers that can be easily linked to their site. Sales that include free shipping and percentage off discounts are popular ways to increase dollars per sales (Stein, 2019).

While consumers reap the benefits of low-cost items and wide assortments to choose from, hundreds of consumers are lobbying against fast fashion brands (Stein, 2019). In order to bring awareness and influence consumers to choose more sustainable options, some consumers are joining together to enlighten others on the consequences of these mass operations. In addition, 73% of Millennials in one survey demonstrated they are willing to pay more for products that are sustainable (Stein, 2019).

Disadvantages of fast fashion. While fast fashion is growing quickly, consumers are aware of the disadvantages that come from quickly made, inexpensive products. Some disadvantages include being unsustainable, imitation of high-end originals and tough competition (Motkar, n.d.). As mentioned before, being able to compete with other fast fashion retailers is difficult, as consumers have multiple ways to find the product and price they are wanting and willing to pay. Because of the short product life cycle, products made for the fast fashion market are also perceived to be unstainable. Quality may fall short of expectations, as being quickly made can increase the likeliness of error in the process (Motkar, n.d.).

COO. The Country of Origin effect has been studied multiple times. The COO effect has been defined by Samiee (1987) as an influence, positive or negative, that the country of manufacture might have on the consumer's choice processes or subsequent behavior (Abraham & Patro, 2014). COO and image can be based on many factors surrounding the country itself. The familiarity with the country, past experiences, historical ties and rating a country's product can all impact how a consumer perceives COO as labeled on a product (Khachaturian &

Morganosky, 1990). Through the research provided in Khachaturian & Morganosky's (1990) study, it was found that attitudes towards product based on their country of origin can be skewed based on the product category.

Regarding how consumers feel about COO, it was stated that "the label provides a great deal of information to consumers as a result of past experiences with representative national products, learned stereotypes and reputations of national products, and perhaps more general images of traditions and customs of foreign peoples" (Khachaturian & Morganosky, 1990). The review of literature in this area indicated that COO had a considerable influence on the consumers' perception of product quality.

Statement of Changes in Fast Fashion

Recently the industry has experienced changes that are impacting fast fashion companies. In 2019, multiple fast fashion retailers filed for bankruptcy, announce they were closing stores or closed their company completely. Leading fast fashion brand Forever 21 filed for bankruptcy on September 29, 2019 (Staff, 2019). While working on restructuring, they will close up to 178 stores in the United States, and most locations in Asia and Europe. Another retailer, Topshop, is set to close all of their United States stores and 23 locations in the United Kingdom. Charlotte Russe filed for Chapter 11 in February of 2019 (Staff, 2019). After failing to secure a buyer for the company, Charlotte Russe announced it will shut down all stores. The Chief restructuring officer confirmed that the company was unable to keep up with "rapidly evolving fashion trends" that is expected in fast fashion (Staff, 2019).

Statement of Problem

The purpose of this study is to evaluate consumers' perception of value based on the Country of Origin (COO) in the fast fashion retail industry. Many studies have been conducted on how COO impacts brand image, likeliness to buy, the perception of quality and overall value of products based on this attribute. While past studies have delved into luxury brands and the perception of value based on COO in the luxury retail industry, there has been a void in research regarding fast fashion and COO impacting consumers' perception of the value of these products. While fast fashion is a new segment to the retail industry, it is continuing to expand. This study will give insight on to how COO may impact consumers' buying behavior within the fast fashion retail market.

Definition of Terms

Key terms of this research study are fast fashion, value, country of origin, country of manufacturing, manufacturing factories, sustainability, and first, second and third world countries. Fast fashion is the rapid manufacturing of runway and fashionable looks designed for ready to wear at a low-cost. It is designed to be replaced quickly, more so for need than desire (Quora, 2017). Value commonly is defined as price, although characteristics of value are also including quality, assortment, convenience, service and the shopping experience (Gilliam, 2000). In this study, the perception of value is being studied, so it is important to note that priorities in perception change with timelines, innovation, the economic cycle and the available alternatives (Gilliam, 2000). Country of Origin (COO) is defined as a concept of where the products or services were manufactured (Ha-Brookshire & Yoon, 2012). In this study, COO represents "Made in America/ Made in China", being that the product was made in with products from the given country, unless otherwise stated.

Over time, this has expanded to more terms as the product development cycle grew. These terms include the following: country of design (COD) which is defined as the country where the final product was initially conceptualized and designed; country of parts (COP), defined as the country where component parts are manufactured; country of assembly (COA) which is defined as the country where the product is partially or fully assembled, but not ready to be sold; and country of manufacturing (COM) which is defined as the country where final product is manufactured (Ha-Brookshire & Yoon, 2012).

Manufacturing factories are defined as a factory that processes, prepares, and makes, including cutting and sewing woven or knit materials such as leather, rubberized fabrics, plastics, and furs, into wearable apparel items (Manufacturing Industry, 1996). Sustainability in this study will be used with the context of meeting the economic, ecological and social needs of the day without impairing the chances or development of future generations, such as upcycling, making less of an economic impact and reducing waste (Bagrcraft, n.d.). First world countries are developed, capitalist and industrial countries, including North America, Western Europe, Japan, and Australia. Second World countries refer to former communist-socialist and industrial states, including Russia, Eastern Europe, some Turk States, and China. Third world countries are roughly described as developing countries, including Africa, Asia, and Latin America (First, Second and Third World, n.d.). These are note-able terms as this study will focus on the difference of consumer perception of countries that are known as developed (first world) or developing (second and third world) countries.

Prior Research

Numerous studies have been conducted on the effect of COO and COM and the impact on purchasing decisions and the quality that is perceived of a product. Without focusing on the fast fashion industry - the COO effect, perceived price based on COO, the influence of design and workmanship, and stereotypes have all been studied. The fast fashion sector of the retail industry and information on consumer perceptions of the quality of a product based on this factor has limited research.

Significance of the study

Like stated before, fast fashion is growing and changing the way the fashion and retail industry operates. The need to maintain and compete with leading fast fashion retailers is important for current and future retailers to understand. In addition, this study will give insight into the quality's consumers use to characterize and value merchandise and how they perceive products from developing and developed countries. With sustainability in the fashion industry is growing and consumers are becoming more economically conscious on their purchasing decisions. The outcomes of this study can provide guidance as companies decide on best practices with outsourcing or working with American made manufacturing.

CHAPTER 2: LITERATURE REVIEW

For some consumers, knowing where products are made is an important aspect of a purchase decision. To further explain the impact of COO in retail, research on the COO effect, COO labeling, quality perceptions, consumer perceptions, purchasing decisions, consumer behavior, perceived price, design, and workmanship, and differences in class is conducted. In

addition to research on COO, fast fashion and sustainability, along with perceptions of developing countries manufacturing will be assessed.

Fast fashion and sustainability. Loyal consumers are key to making fast fashion retailers successful. There are numerous outlets and opportunities for consumers to shop with multiple companies. Customer loyalty can give retailers the edge they need to compete within this growing market. Retailers can create loyal customers multiple ways including social media marketing, online interactions, and online brand communities within their social media platforms. (Kim, Park, & Glovinsky, 2018). The product variety is another opportunity for retailers to gain and retain customers. The product variety is defined as "the number of versions of a product offered by a firm at a single point in time". This can be the same style in multiple colors, patterns and prints or different style features such as shape and structure (Mehrjoo & Pasek, 2014). Fast fashion retailer Fashion Nova's CEO has stated that his goal is to provide a wide assortment with the best prices. Their assortment is extremely large, with additional styles being added weekly (Hughes, 2018). Not only does this allow consumers to shop with them more often and find new products each time, but this also allows them to turn over product quickly (Hughes, 2018).

COO effect. Through past studies, it has been found that Made in the USA products are most desirable thanks to the COO effect. One study defined the COO effect as a consumer's dependency on COO when forming opinions on the quality of a product (Ha-Brookshire & Yoon, 2012). An example of this is "Made in America" vs. "Made in China". When a consumer sees "Made in America", they may perceive the product to be of higher quality and value, particularly when the price is unknown (Ha-Brookshire& Yoon, 2012). Certain factors such as

brand name or COO are helpful for consumers to form their own opinion on what the product price would be, in return, impacting purchase intention (Ha-Brookshiren & Yoon, 2012). In one study, it was found that when using the US and China as COP and COM for cotton apparel, the study assessed the effect of consumers' demographic characteristics, prior knowledge, and perceived sustainability on their perceived price (Ha-Brookshire & Yoon, 2012).

In an article written about the COO effect, it is mentioned how the country's name provides a complex connotation to the name of a company that can result in the gain or loss of relevant customers. Italy's reputation in the fashion industry has given this COO a positive impact for companies based in this country (Kimani, 2016). They are known for high fashion and quality garments all over the world. In addition, a study of French consumers had a high COO image for their own country and therefore, was willing to spend more on apparel from France (Kimani, 2016).

Another example of how the COO effect can impact consumers' perception of a brand is in Kenya. While there are outstanding and inspiring designers and clothing that come from Kenya, the fashion industry overall has many economic challenges (Kimani, 2016). Some of these challenges include mismanagement, stiff competition from second-hand products and imports, lack of investment in the industry and the termination of regional trade treaties. In one study, it was found that 89.76% of consumers in Nairobi, the capital of Kenya, prefer products made in Western countries. This could be because of the admiration consumers in developing countries have for those in more developed countries (Kimani, 2016). It has been found that the exception to this would be those with a strong sense of national pride and patriotism or for companies that have marketing schemes that show to be effective. Addressing COO as a factor in

the consumer decision-making process is important for companies as if they do not, it can hinder their quest for globalization (Kimani, 2016).

COO labeling. "Made in…" labels can disclose a wide variety of information to the consumer. Not only does this tell you where the garment was produced, but it can also provide attributes that can give insight into the conditions in which the garment was made. "Made in.." is an indicator that tells the consumer what regulations and health, safety and wage standards the product was created under (Does 'Made in' matter, 2015). Today, the manufacturing of apparel products can be a complex field. With new factors such as COM, COA, and COP, it is hard to determine where the product was specifically made. While some companies are manufacturing products in low-labor costs countries like China, the product can be packaged in France or the UK, therefore, holding a "Made in France" or "Made in the UK" label (Does 'Made in' matter? 2015). In situations like this, COM, COA, and COP become important for consumers to know, as this can give a more in-depth look as to how the garment was truly produced. The European Union's regulations state that a company only needs a certain amount of the product manufactured in a country before they are able to claim a "Made in…" label (Does 'Made in' matter? 2015).

"Made in the USA" labels have regulations they must follow as well. For instance, if the item is made in the USA with materials from the USA, a "Made in the USA" label can be on the garment. If an item is made in the USA with imported materials, the label must read "Made in the USA of imported materials" (Harms, n.d.). For consumers, this allows them to make presumptions on material quality and value when choosing a product. In addition, a label must

include an identification number of the manufacturer, importer or other firms in which the handling of the product was done, as these are FTC standards (Harms, n.d.).

Quality perceptions. "Made in the USA" has been a preferred COO of many products in general, and specific categories such as food, electronics, and textiles. In one study, researcher Gaedeke (1973) delved into how participants would rank in quality the US, Philippines, and Indonesia (Khachaturian & Morganosky, 1990). The US was ranked with the highest quality, followed by the Philippines and lastly Indonesia (Khachaturian & Morganosky, 1990).

In the foundational study by Janet Khachaturian and Michelle Morganosky (1990), they aimed to determine how American participants rated COO in different retail situations. It is important to note that this study is dated in 1990, making it likely that findings have become different over time. It was found that the US made clothing was perceived as having the highest quality, followed by (2) Italy, (3) China, (4) Korea, and (5) Costa Rica. In addition, they delved into which type of store is associated with the best quality and price (Khachaturian, J., & Morganosky, M., 1990). In this, it was found that department stores were ranked number one, off-price stores ranked number two and discount stores ranked number three. In addition, rankings for discount stores were improved when associated with the US made and Italian made apparel. Off-price stores were perceived higher when selling the US made apparel and significantly lower when associated with Korea, China and Costa Rica (Khachaturian & Morganosky, 1990). Overall, foreign countries in this study, with the exception of Italy, were all perceived to be of lower quality, while US products were perceived as the best (Khachaturian & Morganosky, 1990).

Schurenberg (2012), describes that the perception consumers may have of "Made in the USA" items can go one of two ways. One is that the consumer is receiving a "rugged, sturdy, no-frills, American quality" item. Another being that they are embracing an "artisanal, moral, locavore sensibility" motion by purchasing the item (Schurenberg, 2012). Consumers who agree to these assumptions by Schurenberg can see the use of stereotypes that can impact consumers' perceptions. It is noted in the article that "Made in the USA" items are far more than the descriptions above, and by only thinking of items as "no-frills" or "moral", you are selling "Made in the USA" short of its reputable quality. In terms of market research, the USA ranked number one, ahead of Germany and the UK (Schurenberg, 2012).

While the quality of "Made in the USA" is noted as being one of the best, domestic consumers are less impressed by American quality and innovation than other countries. In contrast to this information, Ha-Brookshire (2012) found that when consumers were offered a basic t-shirt made in the U.S. with U.S cotton versus one made in China with local materials, Americans preferred the U.S. garment (Schurenberg, 2012). In addition, Americans valued the garment at almost twice of what they valued the "Made in China" garment at. It is also noted that America's reputation is on the incline in terms of product quality and awareness (Schurenberg, 2012).

To go against studies on American consumers, Rahman, Fung, Chen, and Gao's (2017) study found that Canadian and Chinese consumers viewed COO and brand name as the least important product cues when deciding on purchasing a product (Rahman et al, 2017). Although Chinese consumers' ranked brand name as one of the least important cues, there was a significant difference in scores between the two country's consumers, suggesting that brand name is a more

influential cue in China. In addition, Canadian consumers ranked COO higher in influential cues than Chinese consumers. Participants from both countries said that the most important cues for deciding on a product were fit, style, price and quality/workmanship (Rahman et al, 2017).

COO and consumer perception. With the COO effect being used by consumers to make perceptions about quality and price, the halo effect and summary effect can factor into purchase decisions. The halo effect, regarding COO, is when consumers are not aware of the country's product and forms beliefs off of the country image. The summary effect is when they are aware of the country and its product, and form a country image based on past experiences with product attributes and characteristics.   In one study, it was found that COO plays a major role in shaping a consumer's decision process when purchasing items (Saran & Gupta, 2012). In addition, there have been multiple studies that have found how COO is the main factor in consumers' perception of overall value and quality of products (Saran & Gupta, 2012).

Another concept to consider is the concept of brand origin (BO). Through the research of Thakor and Kohli (1996), BO was defined as "the place, region or country to which the brand is perceived to belong by its target consumers" (Saran & Gupta, 2012). The perception of BO can differ from COO because of lack of information about a brand. Along with being described as the origin of a brand, it is also a part of brand personality (Saran & Gupta, 2012). Brand personality is defined as a mind-based thought developed by the consumer, who forms mental pictures about the brand through his or her experiences, perceptions, misconceptions, and value systems. This can come about after an experience between a brand and a consumer (Chiang & Yang, 2018). Marketers can develop brands to have a humanized effect, making them more appealing to consumers. In addition to BO, the nation in which an item was created can also

impact how consumers perceive its products and brands, finding that COO can have a direct and positive effect on a consumer's evaluation of the quality of a product (Chiang & Yang, 2018).

Brand image was defined as "perceptions about a brand as reflected by the brand associations held in consumer memory" (Chiang & Yang, 2018). This is a characteristic that individuals may use to reflect upon the brand and the way they perceive the brand. Positive brand images can increase likeliness to buy, as consumers with positive brand images view the products from that brand in a positive manner (Chiang & Yang, 2018). Both brand image and brand personality can play a major role in how consumers view a brand and their perceptions of the value of their products (Chiang & Yang, 2018).

BO is directly related to brand image, as it plays a major role in determining a consumer's perception of the brand. In one study, based in the emerging markets of India, the effect of BO was researched. It was found that BO was influenced by social motivation and identity (Saran & Gupta, 2012). In this study, the association of BO was "the activities or processes that consumers are engaged in, to associate the brand with images of a particular place or region or country". When comparing COO to the BO, the COO is centered around the country at a product level, while the BO is centered at the brand level (Saran & Gupta, 2012).

In a study by Ahmed and d'Astous (1996), they interestingly determined that COD and COA impacted consumers' perception of quality and value more so than a brand name (Saran & Gupta, 2012). In another study, conducted by Elliott and Cameron (1994), it was found that price and quality played a more important role in the desire to buy, in comparison to COO (Saran & Gupta, 2012). Although the two influences of COO that widely affect consumers' evaluation of a

product are quality and purchase value, when deciding to buy, this dimension falls short of price and quality the consumers can assess at the moment (Saran & Gupta, 2012).

Consumer purchasing decisions. Purchasing behavior can be monitored in a multitude of ways. One model describes five steps that can lead to a decision when deciding on if the individual will purchase a product or not (Johnston, 2016). The first step was recognizing a problem or need. In the fast fashion industry, this could be the consumer needing a new apparel item, shoes or accessories quickly and on trend. The second listed in this model is an information search (Johnston, 2016). With the use of technology, this is readily available at the fingertips of most consumers, as they can use online websites and searches, mobile devices and apps to search for items on a plethora of platforms. The third step is the evaluation of alternatives (Johnston, 2016). In fast fashion, products are often similar, on trend and readily available at a fast pace. An evaluation can be done on price and other attributes such as in-stores availability, whether the product is available online or not, and shipping rates and times from online orders. Evaluating the product and retailer can give the consumer the information needed to make the best choice. The fourth step in this model is the purchase decision (Johnston, 2016). After an evaluation is done and a choice is made, a consumer can now decide to buy the item if it is still desired. The last step in this model is the post-purchase behavior. This could include buyer's remorse if the product was not what was expected, as well as satisfaction if the product was up to expectations (Johnston, 2016).

There are three attributes that are economic stimuli for purchasing fashion products according to Rajagopal (2011), as found in their study over consumer culture and purchase intentions toward the fashion apparel industry in Mexico. These three attributes are uniqueness,

price level and sales or discounts (Rajagopal, 2011). When thinking of fast fashion, it is evident that those three attributes are important to the shopper as (1) uniqueness will offer them something different from those around them. With so many options and styles in fast fashion, this is easy to achieve. Price level (2) is important in fast fashion because trends and fads can come and go. Consumers view fast fashion as a less expensive option to have items in real time and be able to afford the next trendy piece. Sales and discounts (3) can encourage consumers in their purchase decision to make a purchase.

While evaluating the product, information such as COO will become evident and vital in determining where to shop. In one study, where 100 women were surveyed at House of Ria Miranda in Malang, Indonesia, it was found that brand image had a positive and significant effect on purchase decisions. With COO being highly related to brand image and how consumers view a retailer or label, we can see the correlation of brand image and COO to purchase decisions in this regard (Devita & Sahara, 2018). Consumer purchasing decisions can be encouraged by multiple factors, including the ones listed above. Retailers must keep these aspects in mind when working with manufacturers, advertisers, and how they market to reach the most consumers (Johnston, 2016).

Perceived innovativeness of product. In Gleim, Lawson, and Robinson (2015) study, they found that perceived innovativeness positively affects perceived product quality and anticipated satisfaction of a product. With this, it is determined that countries that have a higher innovativeness ranking, would then be seen as having a higher valued product. In Dr. Dhiraj's (2018) most innovative countries article, he listed the United States at number six and China at number 17. Using Gleim et al., (2015) method, this would make the United State perceived

innovativeness higher than that of China's. While there are still limited studies on perceived innovativeness, Gleim et al., (2015) study have highlighted how this is an important factor for companies and brands of all industries to consider when making business decisions. Consumers of all industries are continuously changing and expecting new product offerings that meet their needs. Innovativeness through new processes, services, or goods are ways firms have effectively utilized prior research to satisfy consumer demand.

Consumer behavior. The process where individuals or groups select, purchase, use or dispose of products, services, ideas or experiences to satisfy their needs and desires is known as consumer behavior (Rahman, Haque, & Hussain, 2012). Studying how the country of origin impacts consumers' shopping habits in fast fashion, knowing what impacts consumer behavior, in general, will give insight into how the consumers' purchase decision is made. When deciding to make a purchase, the COO or COM can interfere or encourage a consumer to buy, as this is part of the evaluation process of a product.

COO impacting perceived price. Country of origin is a concept of where the products or services were manufactured. In recent times, this has expanded to COP, COM, COB, and COD. Each of these concepts offers different information to consumers, where they gain more specific designations to evaluate product attributes. In regard to the country of manufacturing, consumers want to know this information to determine if the product is safe and made in a safe manner. In addition, COM can allow consumers to exercise their support for the domestic economy and local communities. COP helps consumers make appropriate judgments on a country's involvement in the overall manufacturing process. COD and COB help communicate added

values contributed by a country that is well known for excellence in the product category (Ha-Brookshire & Yoon, 2012).

Through past studies, it has been found that Made in the USA products are most desirable thanks to the COO effect. The COO effect refers to a consumer's dependency on COO when forming opinions on the quality of a product. An example of this is Made in America versus Made in China (Ha-Brookshire & Yoon, 2012). When a consumer sees a Made in America label, they may perceive the product to be of higher quality and value, particularly when the price is unknown. Certain factors such as brand name or COO are helpful for consumers to form their own opinion on what the product price would be, in return, impacting purchase intention (Ha-Brookshire & Yoon, 2012).

Based on past studies, it is found that COO plays a major role in consumers' decision-making processes and influences how consumers view and evaluate product attributes. For example, in one study, it has been found that US female consumers evaluated foreign products higher than the US made products (Ha-Brookshire & Yoon, 2012). Similarly, younger consumers and educated consumers with higher income were more likely to accept foreign-made products in comparison to older people or lower income consumers with limited education. Developing countries also suffer from negative stereotypes as consumers judge products based on COO. Higher quality ratings were given to products that were produced in countries that are more economically developed and politically free (Ha-Brookshire & Yoon, 2012).

When investigating in today's businesses, the COO effect is no longer a simple task to grasp. With raw materials being brought in from all over the world to one country to be produced, determining the COO is a tricky task. We commonly find multinational products –

products with more than one COO- in today's marketplace (Ha-Brookshire, J., & Yoon, S.,

2012). Most industries will use the COM as the "one-country" when choosing origin designation.

Because of these multinational products, the concepts of the country of design, country of

assembly and country of parts were introduced to be useful when consumers are judging values.

Through studies, these attributes were found to affect consumers evaluations on product quality

(Bettman et al., 1998; Ha-Brookshire & Yoon, 2012; Zeithaml, 1988).

Price can be used as a predictor of quality, particularly when the consumer has limited

knowledge of product or offers. Product quality can be naturally formed by a consumer based on

price. This causes the consumer to believe that higher quality products are more expensive and

lower quality products are generally cheaper (Ha-Brookshire & Yoon, 2012). This price/quality

relationship is described as the price-reliance schema. Although the relationship between quality

and price has been discussed, the relationship between COO and how this influences price has

rarely been discussed in prior research. However, one study was done to test the relationship

between COO and price (Ha-Brookshire & Yoon, 2012). In this study, it was found that US

consumers were willing to pay a 37% premium for US-made shoes and 105% premium for US-

made toothpaste, compared to the same products made in China (Ha-Brookshire & Yoon, 2012).

In one study, both COP and COM of the US and China were selected to be tested. This

study tested how these two aspects impact the COO designation of hybrid or multinational

products. In total, cotton from the USA made in the USA was found most valuable in price,

cotton from the USA made in China followed in second, cotton from China made in the USA

was close behind in third, and by quite a difference, cotton from China made in China was found

least valuable in price (Ha-Brookshire & Yoon, 2012).

Design and workmanship influence on perceptions of COO. COO can be used to evaluate

brands and product attributes. The COO image is influential in consumers' purchase decisions.

With a favorable country image, consumers are more willing to buy products made in that

country. For unknown brands, COO information can be an indicator to determine the true quality

of a product (Kim, Shin, Cheng, Lennon, & Liu, 2015)

Studies have examined COO effects for product image dimensions in which specific

countries have established reputations for certain product categories. For example, one study

found that both US and Japanese consumers prefer products made in their own countries, as they

have a favorable opinion of the workmanship on products made there (Kim et. al., 2015).

Brand familiarity is defined as "the accumulated related experiences that customers have

had with a brand" (Kim et. al., 2015). Brand familiarity can be built by a consumer through

exposure to the brand such as past experiences, advertisements, and word-of-mouth (Kim et. al,

2015). This is also linked to positive product evaluations and favorable brand perceptions. In

addition, when a consumer is familiar with a country a product is made in, the consumers'

experiences with that country will reflect in their view of the product (Kim et. al., 2015).

Through Kim et al., (2015) study, it was determined that the design and workmanship of

apparel are still the dominant factors for evaluating fashion brands. When evaluating Chinese

products, US consumers considered the workmanship of the product a major factor in

determining the overall value and quality (Kim et. al., 2015). Apart from Italy as COO, US

consumers' familiarity with a brand COO impacted the attitude towards the brand significantly.

Kim et. al. (2015) found that there is a need for companies and brands to have strong global

marketing schemes, as this can help familiarize consumers with the brand. With familiarity with

the brand comes positive brand image and attitudes the consumer can base its perception from (Kim et. al., 2015).

Differences in social class perceiving COO. Cheap labor is the main benefits companies gain when offshoring to developing countries. Ashill and Sinha (2004) believe that the higher the competence of the workers, the higher the quality of the product. While working with cheap labor in developing countries, it is believed that the workers' competence is lower, stereotypically providing lower quality products. With a strong brand name, companies can use these low-cost laborers to gain higher profit or sell items at a lower price, beating out competitors. In a study by Cordell (1992), it was stated that consumers who are more familiar with a brand are less reliant on COO. Because of this, consumers who are familiar with a brand, their quality, price, and personality, may not view COO as an important factor when making purchasing decisions. A country's competence can also impact which brands a consumer views as "superior" or "inferior" to others, which is another factor in the ability for brands to produce offshore and maintain a positive brand image and reputation (Miranda & Parkvithee, 2013).

Through a study conducted by Miranda and Parkvithee (2013), middle class and working-class consumers participated to determine the effect of COO, brand equity and purchase involvement regarding the standard and high-fashion apparel made in different countries with different competence levels. The study was in two parts, one was a questionnaire to identify the favorable and unfavorable consumer perceptions of the country's ability to produce apparel items. Part two was a questionnaire aimed to evaluate the product and their likeliness to buy a product. Miranda and Parkyithee (2013) found that although COO, brand equity and consumers'

product purchase involvement all had an impact on consumers' evaluation and purchase intention separately and at different levels, all dimensions impact consumers' likelihood to buy.

COO in developing countries. From previous studies, it was found that developed countries use COO and/or COM as significant factors in determining what a consumer's attitude or belief of a brand or product would be. It has been found that COO has created "expressive and "image" elements, and these elements are then associated with the products from that country (Schultz & Jain, 2015). Consumers in developing nations are likely to find products made in their countries to be of less value or lower quality than those made in developed countries. This could be because of stereotypes that impact how consumers all over the world view their COOs and other nations' COOs. These stereotypes can be formed from national, economic, political, historical, cultural characteristics and traditions. Innovation, design, prestige, and workmanship impact the elements that develop consumer images of products. Overall, historical beliefs play a role in how a consumer views their own goods, as well as the value of luxury goods (Schultz & Jain, 2015)

In a study by Agbonifoh and Elimimian (1999), the attitudes of Nigerian consumers for products made in Nigeria, Ghana, the USA, Japan, Taiwan, and the UK were researched. It is stated in this study that the USA, UK, and Japan are typically known as developed countries in comparison to Nigeria, Ghana, and Taiwan by most consumers (Agbonifoh & Elimimian, 1999). The need to understand the implications that COO makes to consumers is important in developing countries as there are two attitudes that can create marketing problems. For the home economy, the need for products to come from the country is critical. In addition, globalization can be halted by invisible barriers when discrimination to a certain country is created (Agbonifoh & Elimimian, 1999).

Agbonifoh and Elimimian's (1999) study, which was conducted with participants from Benin City and Warri (both cities in Nigeria), set out to determine the attitudes of products from six countries. The results found that the Nigerian participants found their own homemade goods to have negative ratings, as well as the most negative image. Ghana followed in second lowest for both categories. The rest of the countries, including the USA, UK, Japan, and Taiwan all had positive product ratings (Agbonifoh & Elimimian, 1999). With consumers in developing countries finding their own products to be of less value and to have a negative image, shows the importance of COO when determining manufacturing locations (Agbonifoh & Elimimian, 1999).

COO impact on purchasing behavior in luxury brands. Certain factors in luxury products have become important in the discussion of COO. First, the emergence and evolution of COO; second the influence of COO on purchase decisions; and third, how the COO is used in developed and emerging nations (Schultz & Jain, 2015). Emergence and evolution of COO historically start with the term "made in" and was used by brands to identify the source of the product. As mentioned before, today there have been terms to specially identify characteristics such as country of parts, country of design and country of manufacturing (Schultz & Jain, 2015).

Labeling COO on products led to consumers questioning and having concerns about the quality and manufacturing process for products made in countries with limited available information. The concerns from consumers came from the competitive prices they began seeing when companies started outsourcing manufacturing (Schultz & Jain, 2015). Because prices had dropped, they began to question the quality and value of the products and the circumstances in which they were being made. As an informative cue of brand image and quality, COO can influence cognitive, affective and normative mindsets of consumers (Schultz & Jain, 2015).

Established markets, such as Europe or America, are able to provide more detailed information about a garment. With a COO of a developing country, consumers have a harder time finding information about the whereabouts of the products' life cycle (Schultz & Jain, 2015). In addition, COO and price co-relate, as consumers may view products from developing countries as lower quality, and in return, be priced at a lower cost. COO plays a significant role in consumer purchasing decisions, as price, quality, labeling and consumer perception of value are often seen as characteristics of COO (Schultz & Jain, 2015).

In Schultz and Jain's (2015) study, an exploration of the perceptions, purchase decisions and behaviors of Indian consumers toward COO of luxury brands was conducted through focus groups and interviews (Schultz & Jain, 2015). Focused groups were used to determine consumers' needs, perceptions, attitudes, and behaviors within the luxury fashion industry. The focus groups were done with participants between the ages of 18 and 35 that are consumers of luxury brands in India (Schultz & Jain, 2015). The second study was done through interviews with consumers, luxury retail managers, and luxury brand managers. It was present in both studies that COO is important for luxury consumers as they compare products from different countries based on quality, products features, and innovation (Schultz & Jain, 2015). Developed countries, such as Germany and the United States, are known for being further developed in technology, therefore, offering more innovative products (Schultz & Jain, 2015).

It is interesting to note that although consumers in India are price sensitive, they are also value conscious, meaning they are willing to pay more for higher quality goods (Schultz & Jain, 2015). In India, this could mean opting to buy products made outside of their own nation, as it was found that many perceive goods made in this country to be of lesser value than those made

outside of this country. This study found how important it is for consumers who buy luxury goods to know where their garments are made and produced, as the value of these goods can be based on these measures (Schultz & Jain, 2015).

There are some obvious differences between fast fashion and luxury companies. Fast fashion is known for mimicking these high-end brands at a low cost. This low cost can provide the wide assortments that retailers and their consumers want in today's retail industry (Slow fashion vs. fast fashion, 2016). Luxury retailers (also referred to as slow retailers) are known for recognizing the impact that clothing makes on society and are aware of the importance of consumer perception of quality. Luxury goods are known for being made in ethical manufacturing factories, where consumers can be assured their clothing is being made in a safe working environment (Slow fashion vs. fast fashion, 2016).

Millennials. Millennials, otherwise known as Generation Y, are individuals who were born between the early 1980s and 1990s. Positively, this generation has been described as open-minded, confident, self-expressive, upbeat and receptive to new ideas and ways of living (Main, 2017). In addition, Millennials are known to have distinct values, predilections, habits, and fears tied to their earing and spending habits (Landrum, 2017). It was found that Millennials prefer to do business with corporations and brands with pro-social messages, sustainable manufacturing methods and ethical business standards (Landrum, 2017). With this, 81% of Millennials expect their favorite companies to make public declarations of their corporate citizenship, making positive ethical practices important for companies targeting this generation (Landrum, 2017).

While Millennials take notice of the quality and where a product is made, it is important to note that this generation is very money cautious. A sale or coupon can become the deciding

factor in a purchase decision (Kestenbaum, 2017). With fast fashion notorious for its cheap prices and quick turn-around of products in store, Millennials shopping with fast fashion retailers is no surprise (Bain, 2015). Retailers such as Forever 21 and H&M have mastered the art of catering their target market by receiving new products every day and offering low prices (Bain, 2015). Millennials also look for excitement with shopping, which is not often found in a department store setting (Loeb, 2015). Fast fashion retailers often have stores located in malls with online and mobile apps, allowing consumers to shop when and where they want. While older Millennials take advantage of mobile apps, younger Millennials often shop in-store or on a computer (Loeb, 2015). While Millennials are coming of age, they are beginning to have large amounts of purchasing power. Because of this, retailers will need to adjust their strategies and stores to align with this generation wants and needs (Loeb, 2015).

Millennials perception of COO. Transparency is a growing characteristic that Millennials look for in the manufacturers of their products. A current trend in the food industry is to check where the products are coming from, and this is growing more and more in the fashion industry (Salfino, 2018). Consumers between the ages of 25 and 34 were 10% more likely to check clothes for the country of origin while shopping than consumers 35 to 55 (Salfino, 2018). In addition, consumers are also checking for fabric content and where the material itself is coming from (Salfino, 2018). In a study consuming of 9 million millennials, research has found that 90% of participants would feel good about wearing apparel with cotton grown in the U.S., while 58% of these consumers were willing to pay more for U.S. grown cotton clothes (Salfino, 2018).

In Tjandra, Omar and Ensor's (2014) study over COO effect on Millennials' perception, it was found that individuals from developed countries preferred a product from developed

countries, as they listed quality of product and ethical values to be their reasoning. When asked about emerging countries specifically from participants from developed countries, many related terms associated with ethical issues such as chap work, child labor, poverty, and exploitation were used (Tjandra et al., 2015). In contrast, participants from emerging countries main concern with products made in emerging countries were the quality of product, prestige, and price (Tjandra et al., 2015). These participants related the terms premium, status, design, quality and value for money to products made in emerging countries.

When given the option of two T-shirts with identical brand names, style, color, and price but one was made in a developed country and one in an emerging country, participants from both developed and emerging countries favored the t-shirt made in the developed country (Tjandra et al., 2015). When asked to explain why, developed country participants listed quality of product and ethical issues as their main reasoning. Participants from emerging countries stated that a T-shirt made in a developed country or advanced economy would be known for having better product quality, making this their decision factor (Tjandra et al., 2015). Overall, it was found that Millennials preferred products from developed countries, otherwise stated as advanced economies, due to the reputation of product quality and manufacturing practices (Tjandra et al., 2015).

Hypotheses

Hypothesis One: Consumer perception of value for apparel merchandise is impacted by country of origin.

Hypothesis Two: Consumer perception of value is higher for fast fashion garments manufactured in the United States than in China.

Hypothesis Three: Millennials' perceived innovativeness of products made in the United States is higher than in China.

Hypothesis Four: Millennials willingness to buy fast fashion products made in the United States is higher than in China.

Hypothesis Five: Millennials have a higher perceived price for fast fashion products made in the United States than China.

Hypothesis Six: Millennials are more familiar with fast fashion products made in the United States China.

Hypothesis Seven: Millennials are expected to view a fast fashion apparel product made in the United States to be of higher quality than China.

Theory. Roth and Romeo's (1992) study measured country image based on four dimensions:

innovativeness, design, prestige (status and brand name reputation), and workmanship (quality).

Roth and Romeo (1992) stated that a plausible explanation is that consumers' perceptions are

formed by relating what they know about a country's ability to produce goods to a product. Their

study focused on the product-country matching within the dimensions of innovativeness,

willingness to buy, prestige and workmanship. A match between product-country would occur

when the perceived strengths of a country are important product features or benefits for the

particular product category.

From their study, findings indicated that product-country match may be an indicator of

willingness to buy foreign products. Within Roth and Romeo's (1992) theory, products that were

rated highly for one dimension were also rated highly on all other dimensions. This study is

finding the connection between country of origin and perception of value based on perceived

innovativeness, willingness to buy, perceived price, familiarity of country's product and quality.

Using Roth and Romeo's (1992) theory that higher rankings of these dimensions relate to a

positive product-country perception will be used in determining perception of value based on

country of origin in this study. Roth and Romeo's (1992) framework has been used in other

studies including Matarazzo & Resciniti (2012); Mohamad, Ahmed, Honeycutt, & Tyebkhan (2000); and Fischer & Zeugner-Roth (2017).
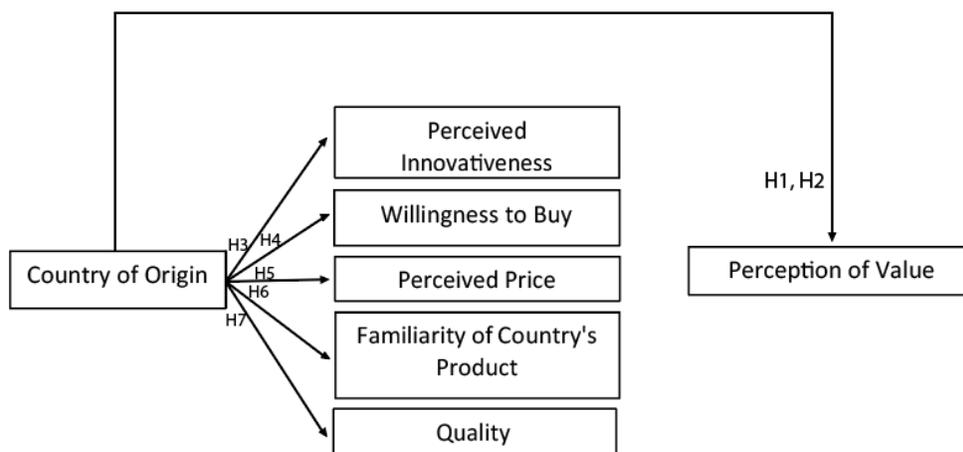
Figure 2.1: Conceptual Model

CHAPTER 3: METHODOLOGY

Using mixed methods, using both quantitative and qualitative research will be conducted. Mixed methods research is defined as the combining or integration of qualitative and quantitative research and data in a research study (Creswell, 2014). Furthermore, qualitative data tends to be open-ended without predetermined responses while quantitative data usually includes close-ended responses such as found on questionnaires (Creswell, 2014). This research method is best to define this study, as there will be both open and closed-ended questions. These questions will be asked through a survey, provided to participants to take through Amazon's Mechanical Turk (MTurk). Participants will be recruited through MTurk, which is a crowdsourcing marketplace that will distribute questionnaires to participants virtually. MTurk has access to a global, on demand, 24/7 workforce with a diverse range of ages and demographics (Amazon Mechanical

Turk, n.d.). Participants will receive a survey link that is posted on their website. MTurk is a paid survey site, that allows requesters to pay a fee for their questionnaires to be available to their users. The price includes both the pay for the participants and the fee for using MTurks system, with a minimum fee of $0.01 per assignment (Amazon Mechanical Turk, n.d.). The expected number of participants is between 200 and 250 consumers based on the expected fee of $0.15 per assignment.

Due to the popularity of fast fashion with Millennial consumers, the hypotheses in this study will be limited to those aged 18 to 35. Millennials are categorized as those who were born in the 1980's and the 1990's (Main, 2017). One research center listed that Millennials were those who were in the age range from 20 to 35 (Fry, 2018). Generation Z are those who were born between 1997 and 2012, any participants who fall into this category will be categorized as Millennials, due to the closeness of age and small quantity of participants that fall into this range (Dimock, 2019). As mentioned before, Millennials purchasing power is growing and will continue to grow which makes them an important consumer group to understand, as their needs and wants can differ from those of other generations.

Participants who are 36 and older will also be able to participate in this research study, whose results will be used in comparison to the Millennials. The age groups in this study will be broken down to Millennials and 36 and older. The reason for only using two age groups in this study will be to focus on the Millennials results and their perception of value of fast fashion products based on COO.

The countries selected to be studied are the United States and China. China is selected because of the popularity of manufacturing in this country for fast fashion retailers. Forever 21,

H&M and the Gap are three fast fashion retailers who manufacture products in China (Hicken, 2012; Supplier List, n.d.; Supplier Partnerships, n.d.). The United States is selected for this study because manufacturing factories in this country provide safer work environments, has a minimum wage requirement and workers are generally more experienced. (Livingston, n.d.).

Procedure. To determine how COO impacts consumers' perception of fast fashion, participants will be asked a series of questions. The initial question asked will come from Wang, Siu, and Hui's (2004) study about consumers' decision-making style when given domestic and imported products. Participants will be asked, "do you prefer to buy domestic brands, imported brands or both and why when shopping with fast fashion retailers?". Using Roth and Romeo's (1992) survey questions, participants will be asked to measure their perception of the United States and China. Participants will be given a statement and using a 7-point scale (1- not innovative; 7-very innovative), which will measure their perspective of innovativeness of a country's apparel product. This question will gain insight into how consumers view a country's use of technology and engineering advancements, which can be applied while producing apparel items, as well as within the style themselves.

In the second section, with data collected using Roth and Romeo's (1992) survey items, participants are asked how willing they are to purchase products and how familiar they are with apparel products made the United States and China. Like Roth and Romeo's (1992) study, this will measure how product-country relates to purchasing behavior. Participants will be given the following statements, "how willing are you to purchase apparel products from the United States" and "how willing are you to purchase apparel products from China". Using a 7-point scale (1 being strongly not willing and 7 being very willing) participants will rate their perceptions of this

measure. The following questions will also be asked where participants will use a 7- point scale (1 being strongly not familiar and 7 being very familiar) to rate their perception of the following measure: "how familiar are you with apparel products made in the United States" and "how familiar are you with apparel products made in China".

Following Acharya and Elliott's (2001) study, a scenario will be given to participants to find the perception of quality. In this method, they will be given the scenario of a pair of jeans from fast fashion retailer Forever 21 retailed at $12.90 (starting price for basic jeans). This will be presented to participants with the following: "would you expect the quality of a pair of Forever 21 jeans, retailed at $12.90, made in the United States (China) to be (select one)?" followed by a 7-point scale (1 being extremely poor, 7 being extremely good). The follow-up question will be presented to the participants with the following: "how likely are you to buy a pair of Forever 21 jeans, retailed at $12.90, made in the United States (China) to be (select one)?" using a 5-point scale (1 being definitely not buy, 5 being definitely buy).

Using Joung's (2014) study, screening questions will be asked to grasp our participants' involvement in shopping with fast fashion brands and companies. For fast fashion purchase, a yes/no statement will be used: "I purchase apparel products in stores that carry fast fashion brands (e.g. H&M, Forever 21, Zara, Gap, etc.)" (Joung, 2014). To measure amount of apparel product purchase, a single question was developed; "Approximately how many items of apparel products do you purchase a year?" and the respondents answered on a ten-point scale with 5-apparel item intervals (1 - fewer than 5 items, 2 – 5 to 9 items, 10- 45 or more items) (Joung, 2014). For a measurement of apparel disposing, a question asked "How many items of apparel products do you dispose of in a year?" and the respondents answered on a ten-point scale with 5-

apparel item intervals (1 - fewer than 5 items, 2 – 5 to 9 items, 10- 45 or more items) (Joung, 2014).

Using the same survey items as Collett, Cluver, and Chen (2013), consumer perception of fast fashion will be measured. This approach will be done by using a qualitative questionnaire consisting of open-ended questions to allow participants to expand their thoughts on this sector of retail. Participants will be asked to describe how they feel about fast fashion retailers. This approach can provide insight into the consumers' perception of the fast fashion industry as a whole. Participants will also be prompted with the statement: "Fast fashion retailers encourage consumers to make frequent purchases in their stores by continually bringing in new fashion-oriented clothing items and selling them at low prices" followed by two questions: "is this a good, bad, or neutral thing for consumers?" and "is this a good, bad, or neutral thing for society?". These two questions will enable us to learn how consumers feel about the limited lifespan of fast fashion apparel items (Collett, Cluver, & Chen, 2013).

Questions about the demographics of the participants will be included in the survey as well. Using the same methods as Wang, Siu, and Hui (2004), a variable such as age, education level, and annual income will be asked. While the participants are already asked how much they typically spend on apparel and fast fashion items in this study, they will also be asked the frequency of shopping and frequency of reading fashion magazines (Wang, Siu, and Hui, 2004). These questions can give insight into how much consumers are involved with keeping up with fashion trends and topics.

Cronbach's alpha, developed in 1951 by Lee Cronbach, measures the reliability or internal consistency of a quantitative test (Stephanie, 2014). A result of alpha at a 0.7 and higher is an acceptable rating using this method. Roth and Romeo's (1992) study had an alpha of 0.76, making this study acceptable. Acharya and Elliott's (2001) study had an alpha of 0.680. While this study did not make the 0.70 mark, according to Cronbach's study an unacceptable rating is an alpha of 0.5 or less (Stephanie, 2014). Because of this mark, Acharya and Elliott's (2001) will be deemed reliable for this study. In Wang et al. (2004) study, alpha was 0.739, deeming this study reliable. The reliability of Joung's (2014) survey questions used in this study had an alpha of 0.84, deeming this study reliable.

Data analysis. The convergent parallel mixed methods approach will be used to analyze the data. This method is typically used when data is being collected at the same time and then both qualitative and quantitative information is integrated (Creswell, 2014). Using this method, qualitative and quantitative data will be analyzed separately, and then compared to see if the findings confirm or disconfirm each other (Creswell, 2014). Because both open and closed-ended will be used in the same survey, the sample of participants is anticipated to be the same. Using the same participants is typically used in this method to create a better comparison of results (Creswell, 2014).

To analyze the two forms of data, the side-by-side comparison approach will be used. In this approach, the quantitative statistical results will be reported first, followed by a discussion of the qualitative results (themes) to confirm or disconfirm the statistical results (Creswell, 2014). The quantitative data will be analyzed through the method of correlation, specifically the Pearson Product Moment Correlation (PPMC). This method shows a linear line between the two sets of

data, the dependent variable and the independent variable, which indicates a positive, negative or no relation. The independent variable is the country of origin. The dependent variables are perceived innovativeness, willingness to buy, the familiarity of countries product, perceived sustainability, perceived price, and quality. The relation between each country as COO and the consumers' perceptions will be found using the PPMC method, giving positive, negative or no relation between the two indicating weather COO impacts consumers perception of products.

Qualitative data will be analyzed through coding to find common themes. Coding is the process of organizing the data by bracketing text segments and writing a word representing a category in the margins (Rossman & Rallis, 2012). In other terms, the text data and sentences that are gathered during data collection will then be put into labeled categories, often a term based in the actual language of the participant (Creswell, 2014). Using the traditional process of this method, codes will emerge during the data analysis procedures. The final step of the data analyzing involves making an interpretation in qualitative research of the findings (Creswell, 2014). The side-by-side comparison used in the convergent parallel mixed methods approach will be used to compare themes found through qualitative research with the findings from the PPMC approach for quantitative data.

CHAPTER 4: RESULTS

Multiple regression was used to analyze the results of the quantitative data in this study. Perception of value, perceived innovativeness, willingness to buy, perceived price, familiarity of country's product and perceived quality were all analyzed using this method. Qualitative data was analyzed by finding common themes in the participants open-ended questions. Results will be analyzed in two sections, millennials and participants 36 and older. After determining the

results for each age group separately, they will be compared to determine similarities and differences between the two.

Throughout the survey, participants were presented fast fashion in the sense of fast fashion products, compared to fast fashion brands, in all but one question. Fast fashion products are specific products that are made in fast fashion manufacturing factories and fall into the description of fast fashion, which is low price, high quantity merchandise that is made for consumers rapidly (Fast Fashion, 2016). A fast fashion brand or company has been defined as low-cost clothing collections that mimic current luxury fashion trends (Slow fashion vs. fast fashion, 2016). By focusing on fast fashion products, participants are able to have a precise idea of what is being presented or asked of them.

Section 1: Analysis of Millennials

Perception of value. A variance of 8.2% was found to predict the United States and China's relationship with perception of value and age (R^2=0.082, F(10,146)=1.826, p=0.061). Perception of value is based on perceived innovativeness, willingness to buy, perceived price, familiarity of country's product and perceived quality. All variables, in addition to age, were inputted into a multiple regression. The Cronbach's alpha for all survey questions measuring perception of value is 0.522. While there was a direct relationship between United States and perceived innovativeness, willingness to buy, perceived price and perceived quality; familiarity of country's product was found to have an inverse relationship. (p. innovativeness: t= 0.655, p=0.514; willingness to buy: t= 1.414, p=0.16; p. price: t=1.625, p= 0.106, p. quality: t=0.893, p=0.373; familiarity: t=-.1861, p=0.065). China and perceived innovativeness, willingness to buy, perceived price and familiarity of countries product all had inverse relationships, while

China and quality had a direct relationship (p. innovativeness: $t= -1.686$, p=0.094; willingness to buy: $t= -0.500$, p=0.618; p. price: $t=-0.952$ p= 0.343, p. quality: $t=0.700$, p=0.485; familiarity: $t=-.190$, p=0.849). In addition to the directional results, the p value in this multiple regression was greater than 0.05, deeming this multiple regression insignificant. Thus, hypothesis one and two are not supported.

The nonsignificant result of this multiple regression could be a result of the sample size (n= 146). The results do indicate directional relationships between perceived innovativeness, willingness to buy, perceived price, familiarity of country's product and perceived quality. The United States and these variables resulted in a direct relationship, while China and these variables were found to have an inverse relationship.

Perceived Innovativeness. A variance of 1.9% was found to predict the United States and China's relationship with perceived innovativeness and age ($R^2=0.019$, F(2,161)=1.581, p=0.209). The Cronbach's alpha for all survey questions measuring perceived innovativeness is 0.039. The United States was found to have a direct relationship with perceived innovativeness and age; however, the multiple regression was not found to be significant as the p value was greater than 0.05 ($t=0.487$, p=0.627). China was found to have an inverse relationship with perceived innovativeness and age, this multiple regression was also not found to be significant with a p value greater than 0.05 ($t=-1.778$, p=0.077). Thus, hypothesis three is not supported.

Perceived innovativeness was presented to participants where innovativeness meant the use of new technology and engineering advances. The results indicated a directional relationship, with the United States having a positive t value and China having a negative t value. The p value

of this multiple regression being greater than 0.05 indicates a nonsignificant multiple regression, thus, not confirming hypothesis three.

Willingness to buy. A variance of 2.9% was found to predict the United States and China's relationship with willingness to buy and age (R^2=0.029, F(2,162)=2.435, p=0.091). The Cronbach's alpha for all survey questions measuring willingness to buy is 0.153. The United States was found to have a direct relationship with willingness to buy and age, this multiple regression was supported as the p value less than 0.05 (t=2.135, p=0.034). China was found to have an inverse relationship with willingness to buy and age, this multiple regression was not found to be significant with a p value greater than 0.05 (t=-1.231, p=0.220). Although the United States relationship with willingness to buy was supported, China's relationship with willingness to buy was not supported with a p value of 0.05. Thus, hypothesis four is partially supported.

Willingness to buy fast fashion products was presented to participants as a 7-point scale question (1- very unlikely, 7- very likely). There was a directional relationship found within the results, as the United States had a positive t value and China had a negative t value. The United States multiple regression was found to be significant, with a p value less than 0.05, however the overall multiple regression was found to be nonsignificant with a p value greater than 0.05. Although there was a directional relationship, this multiple regression was not significant, thus the hypothesis cannot be supported.

Perceived price. A variance of 3.5% was found to predict the United States and China's relationship with perceived price and age (R^2=0.035, F(2,156)=2.816, p=0.63). The Cronbach's alpha for all survey questions measuring perceived price is 0.691. The United States was found to have a direct relationship with perceived price and age. This multiple regression was found to

be significant with a p value less than 0.05 (t=1.983, p=0.049). China was found to have an inverse relationship with perceived price and age; however, this multiple regression was not found to be significant with a p value greater than 0.05 (t=-1.175, p=0.242). Although the United States was found to have a significant direct relationship with perceived price, China did not have a significant relationship with perceived price; thus, hypothesis five is partially supported.

Perceived price was determined through an open-ended question allowing participants to provide the maximum retail price they were willing to pay for a fitted blazer made in the United States (China) and sold at H&M. The average answer for the product made in the United States was $66.61, while China had an average answer of $58 by Millennials. Although the multiple regression was found to be insignificant, the directional relationship aligns with these findings. In addition to this scenario, participants were asked how much they believed a cotton shirt would be based on where the material (cotton) originated and where the product was made (United States, China) in compared to a $40 (average price) shirt that was made of 100% cotton and has a 'Made in China' label. Again, these findings were aligned with the directional relationship that was found in the multiple regression analysis. Table 4.1 shows participants evaluation of each category given.

Table 4.1. Millennials Perceived Price of Shirt Under Different COO Conditions

Avg. Retail of Shirt Made with United States Cotton and Made in the United States	Avg. Retail of Shirt Made with Chinese Cotton and Made in China	Avg. Retail of Shirt Made with United States Cotton and Made in China	Avg. Retail of Shirt Made with Chinese Cotton and Made in the United States
$46.96	$31.57	$37.84	$40.68

Familiarity of country's product. A variance of 1.4% was found to predict the United States and China's relationship with familiarity of country's product and age (R^2=.014, F(2,161)=1.150, p=0.319). The Cronbach's alpha for all survey questions measuring familiarity of country's product is 0.061. The United States was found to have a direct relationship with familiarity of country's product and age; however, the multiple regression was not found to be significant as the p value was greater than 0.05 (t=0.959, p=0.339). China was found to have an inverse relationship with familiarity of country's product and age, this multiple regression was also not found to be significant with a p value greater than 0.05 (t=-0.781, p=0.436). Thus, hypothesis six is not supported.

The evaluation for familiarity of countries product was presented to participants as it was in Roth & Romeo's (1992) study. The multiple regression results in this study coming in as insignificant can be due to differences in the studies variables. In Roth & Romeo's (1992) study, they were presented with 10 countries, greater than the two presented in this study. The products presented also differ from Roth & Romeo's (1992) study, as participants were presented with multiple industries, oppose to this study with the specific category of fast fashion. Although there is a directional relationship with a positive t value for the United States and a negative relationship with China as the t value is negative, the p value in this study too high to confirm the relationship of variables in this study.

Perceived quality. A variance of 0.9% was found to predict the United States and China's relationship with quality and age (R^2=.009, F(2,162)=0.719, p=0.489). The Cronbach's alpha for all survey questions measuring perceived quality is 0.191. The United States was found to have a direct relationship with quality and age; however, the multiple regression was not found to be

significant as the p value was greater than 0.05 (t=1.061, p=0.290). China was found to have an inverse relationship with quality and age, this multiple regression was also not found to be significant with a p value greater than 0.05 (t=-0.17, p=0.986). Thus, hypothesis seven is not supported.

To determine perceived quality, participants were asked what they expected the quality of a pair of Forever 21 jeans, retailed at $12.90 and made in the United States (China) would be on a 7-point scale (1-extremely poor, 7- extremely good). The insignificance in this multiple regression could come from the proposed question or the sample size (n=162). The results did show a directional relationship, as the United States had a direct relationship and China had an inverse relationship. The results and hypothesis were unable to be supported due to the p value in the multiple regression analysis.

Themes. Participants were asked open ended questions to grasp their thoughts and participation in shopping with fast fashion retailers. Of the 165 Millennials that participated, 136 stated that they do shop with fast fashion retailers. Of those that do shop fast fashion brands, 55 preferred domestic brands. Common themes for those who preferred domestic brands were higher quality in the products, better working conditions and supporting the United States economy and jobs. 65 participants stated that they prefer both, with common themes of finding the best retail price regardless of country of origin, quality can vary in products regardless of country of origin and country of origin is not a concern or something they look for when shopping. The fast fashion industry had various reactions from Millennials. Fast fashion products being of bad quality was a common theme when asked how participants felt about the fast fashion industry, as well as being an affordable option in comparison to other sectors of the retail industry.

Section 2: Analysis of People Aged 36 and Older

Perception of value. Participants 36 and older also had nonsignificant results in the six multiple regression that were done. A variance of 5.9% was found to predict the United States and China's relationship with perception of value and age (R^2= 0.059, $F(10,110)$=0.684, p=0.737). The Cronbach's alpha for all survey questions measuring perception of value is 0.493. A direct relationship was found between the United States and familiarity of countries product and perceived quality, while perceived price, perceived innovativeness and willingness had an inverse relationship (p. innovativeness: t= -1.045, p=0.298; willingness to buy: t=-0.271, p=0.787; p. price: t=-0.184, p= 0.854, p. quality: t=0.034, p=0.973; familiarity: t=0.285, p=0.776). A direct relationship was found between perceived innovativeness and perceived quality, while perceived price, familiarity of countries product and willingness had inverse relationships (p. innovativeness: t= 0.410, p=0.682; willingness to buy: t=-0.261, p=0.795; p. price: t=-0.125, p= 0.901, p. quality: t=0.545, p=0.587; familiarity: t=-1.479, p=0.142). These results differ from those found from the multiple regression ran on Millennials.

Perceived innovativeness. A variance of 1.6% was found to predict the United States and China's relationship with perceived innovativeness and age (R^2=0.016, $F(2,123)$=1.010, p=0.367). The Cronbach's alpha for all survey questions measuring perceived innovativeness is 0.788. The United States was found to have an inverse relationship with perceived innovativeness and age; however, the multiple regression was not found to be significant as the p value was greater than 0.05 (t=-1.340, p=0.183). China was found to have a direct relationship with perceived innovativeness and age, this multiple regression was also not found to be significant with a p value greater than 0.05 (t=0.644, p=0.521). This differs from the Millennials

analysis which found the United States to have a direct relationship with perceived innovativeness and age, while China was found to have an inverse relationship.

Willingness to buy. A variance of 1.4% was found to predict the United States and China's relationship with willingness to buy and age (R^2=0.014, F(2,123)=0.875, p=0.419). The Cronbach's alpha for all survey questions measuring willingness to buy is 0.789. The United States was found to have an inverse relationship with willingness to buy and age; however, this multiple regression was not supported as the p value greater than 0.05 (t=-1.293, p=0.198). China was found to have an inverse relationship with willingness to buy and age, this multiple regression was not found to be significant with a p value greater than 0.05 (t=-0.056, p=0.955). These results differ from Millennials, as the United States was found to have a direct relationship, while China was found to have a negative relationship.

Perceived price. A variance of 0.8% was found to predict the United States and China's relationship with perceived price and age (R^2=0.008, F(2,120)=0.458, p=0.633). The Cronbach's alpha for all survey questions measuring perceived price is 0.672. The United States was found to have an inverse relationship with perceived price and age. This multiple regression was not found to be significant with a p value greater than 0.05 (t=-0.645, p=0.520). China was found to have a direct relationship with perceived price and age; however, this multiple regression was not found to be significant with a p value greater than 0.05 (t=0.136, p=0.892). This differs from the multiple regression on Millennials, as a direct relationship was found with the United States and an inverse relationship was found with China.

When asked how much participants 36 and older were willing to pay for a fitted blazer made in the United States (China) and sold at H&M, results were similar to those of the

Millennials. The average retail price this category was willing to pay for the product made in the United States was $52.97, while the average retail price for the product made in China was $38.96. While both categories of participants were willing to pay more for made in the United States products, Millennials found the perceived price to be higher for each country of origin than those 36 and above. In addition to the scenario above, participants were asked how much they believed a cotton shirt would be based on where the material (cotton) originated and where the product was made (United States, China) in compared to a $40 (average price) shirt that was made of 100% cotton and has a 'Made in China' label. As shown in Table 4.2, respondents evaluated the product similarly to Millennials.

Table 4.2. Participants 36 & Older Perceived Price of Shirt Under Different COO Conditions

Avg. Retail of Shirt Made with United States Cotton and Made in the United States	Avg. Retail of Shirt Made with Chinese Cotton and Made in China	Avg. Retail of Shirt Made with United States Cotton and Made in China	Avg. Retail of Shirt Made with Chinese Cotton and Made in the United States
$39.29	$26.73	$32.02	$35.11

Familiarity of country's product. A variance of 2.9% was found to predict the United States and China's relationship with familiarity of country's product and age (R^2=.029, $F_{(2,124)}$=1.828, p=0.165). The Cronbach's alpha for all survey questions measuring familiarity of country's product is 0.771. The United States was found to have a direct relationship with familiarity of country's product and age; however, the multiple regression was not found to be significant as the p value was greater than 0.05 (t=0.103, p=0.918). China was found to have an inverse relationship with familiarity of country's product and age, this multiple regression was also not found to be significant with a p value greater than 0.05 (t=-1.851, p=0.067). These results align

with those found from the Millennial multiple regression, resulting in a directional relationship. Due to the p value, this multiple regression is not significant.

Perceived quality. A variance of 0.5% was found to predict the United States and China's relationship with quality and age (R^2=.005, $F(2,124)$=0.332, p=0.718). The Cronbach's alpha for all survey questions measuring perceived quality is 0.772. The United States was found to have an inverse relationship with quality and age; however, the multiple regression was not found to be significant as the p value was greater than 0.05 (t=-0.555, p=0.580). China was found to have a direct relationship with quality and age, this multiple regression was also not found to be significant with a p value greater than 0.05 (t=0.815, p=0.417). These results differ from those of the Millennials multiple regression. Results from the Millennials multiple regression analysis identified a direct relationship with the United States and quality, while China had an inverse relationship with quality and age. This multiple regression for participants 36 and up is found to be nonsignificant, as the p value is greater than 0.05.

Themes. Out of the 131 participants who 36 and older, 111 stated that they shopped fast fashion retailers. Similar to Millennials, a common theme in preferring domestic made products was to support the economy and creating jobs in the United States. In addition, this age group found domestic made products to be made with higher quality and have a better fit. Again, similar to Millennials, those who preferred both said they look for the best price and good deals when shopping fast fashion, regardless of where the product was made. A majority (53.5%) of the participants 36 and over implied positive feelings for fast fashion, deeming this option convenient and affordable, similar themes that were found with Millennial participants. Themes

from those who implied negative feelings found fast fashion to be low quality products and harmful for the environment.

Discussion

Overall, both Millennials and participants 36 and older had similar views of the fast fashion industry. While many of them shop this sector of the retail industry, they mentioned bad quality but affordable prices for fast fashion products. Creating jobs and supporting the United States economy were the most common themes in why participants prefer domestic goods. Majority of both age groups will shop both domestic and imported fast fashion products, as they have a wider variety and can find the best price. In addition to determining the participants thoughts of fast fashion, COO was tested against other factors to determine the importance of COO in making a decision to buy.

Prior research has delved into how COO impacts brand image, likeliness to buy, perception of quality and overall quality in luxury brands, leaving a need for fast fashion to be studied. Determining if fast fashion products made in the United States had a greater perception of value than China, perceived innovativeness, willingness to buy, perceived price, familiarity of countries product and perceived quality were key elements in this study. The study was presented to participants in an online survey, where they answered multiple choice, scale and open-ended questions. As shown in the results, multiple regression was used to analyze the closed ended questions, while open-ended questions were analyzed by finding common themes and applying these to the qualitative results.

The multiple regression in this study were unfortunately found to be nonsignificant due to the p values. There were directional results, positive relationship with COO and the United States and negative relationships with COO and China, found when analyzing each dimension (perceived innovativeness, willingness to buy, perceived price, perceived quality, familiarity of country's product). While the qualitative results did support some of the directional relationships found in the quantitative data (perceived price, familiarity of countries product), it is important to note that 39.4% of participants said they would shop both countries, with reasonings ranging from finding the best retail prices to not being concerned about COO.

Roth & Romeo's (1995) study found that participants rated their willingness to buy for their home country higher than those of other countries. This study was opened to consumers in the United States, where a direct line was found between the United States and willingness to buy when analyzing the results of the Millennials multiple regression. Participants 36 and older had different views from Millennials when willingness to buy was analyzed. The older age group had inverse directional results with both the United States and China and willingness to buy. Although these results indicate this negative reaction to willingness to buy for the older age group, 46% of participants had a positive reaction to fast fashion with common themes being that fast fashion is a convenient and affordable option. 30% of the older participants had a negative reaction to fast fashion, with common themes being poor- or low-quality product and the harm fast fashion causes the environment.

Similar to willingness to buy, perceived innovativeness also was found to be nonsignificant due to the p value, but a directional line was found between the variables. In Arora, Arora, and Xiao (2017) study determining how COO impacts purchasing decision based

on product innovativeness, developed countries were found to be preferred for high design newness in comparison to emerging countries. When analyzing the results from the Millennials multiple regression, a directional relationship was found as the United States had a direct relationship and China had an inverse relationship. Participants 36 and older had the opposite results from the Millennials; a direct relationship with China and an inverse relationship with the United States. Understanding the participants viewpoints on innovativeness and why they found a country to be or not to be innovative would have been helpful in the overall study.

Perceived innovativeness was presented to participants as a 7-point scale question, where perceived innovativeness was defined as the use of new technology and engineering advances. Based on the results that were found, the way this dimension was studied could have been improved. Although this study was focused on fast fashion, this question specifically did not mention fast fashion products as others had. Participants may have viewed innovation in forms of electronic technology, opposed to technology in apparel or in the making of products. For future studies, an opportunity would be expanding this question to grasp the participants thoughts on innovativeness with fast fashion.

COO's impact on perception of quality has also been researched, finding that this dimension has an impact with consumers (Bilkey & Nes, 1982). As it was found in this study, participants reasoning for choosing to shop with domestic brands was persuaded by quality of product, while other participants who shopped both domestic and imported mentioned that low quality was expected with fast fashion. Both Millennials and participants 36 and older had the same directional relationship with the United States, China and perceived quality. The United States was found to have a direct relationship, while China had an inverse relationship. These

results are not surprising, as both age groups implied that the United States had better quality and workmanship in comparison to China, which was viewed as low or poor quality.

Previous studies have found that Millennials are money, earning and spending, cautious (Landrum, 2017). The quantitative results finding that participants shop both countries because they are looking for the best price is not surprising. Through open-ended questions where participants were asked how much they would expect the retail price to be for a cotton t-shirt made in the United States (China), made with cotton from the United States (China), Millennials and older participants found that made in the USA with cotton from the United States would be higher than that made in China with cotton from China. Although their perception of made in the United States may be higher than that of China, based on the quantitative results, Millennials will look for best price before they look at where the product was made when making their purchase decisions.

In Sandberg, Larsson, & Christiansson's (2018) study, a common motive found in consuming fast fashion products was the lower retail price and the wider variety that fast fashion offers. Participants in this study identified the wider assortment as a reason they would shop with both imported and domestic products, as well as lower price. Although the participants sacrificed for what was perceived as poor- or low- quality products, Millennials were still active when shopping fast fashion companies and brands. In another study, it was found that consumers expected fast fashion companies to keep prices low, in order to purchase more products (Pookulangara & Shepard, 2013). Fast fashion has been characterized as disposable products, and after few wears, the consumer rids of the garment (Fast Fashion, 2016). The findings in

these studies suggest consumers are more concerned with large assortments and purchasing low cost products, than they are with COO when making purchasing decisions in fast fashion.

In the multiple regression analysis, the results for the Millennials found that the United States had a direct relationship with perceived price, while China had an inverse relationship. Participants 36 and older results were the opposite of the Millennials, where results found that China had a direct relationship and the United States had an inverse relationship. These results were unexpected, as the open-ended questions resulted in higher average retails for made in the United States in comparison to made in China from the older age group.

Both Millennials and older participants had directional relationships with the United States, China and familiarity of the country's product. The United States had a direct relationship, while China had an inverse relationship. Consumers can become more familiar with a country's products due to exposure, past experience, advertisements and word-of-mouth (Kim et. al, 2015). With participants in this study living in the United States, their access to exposure, experience and advertisement could be more likely, as well as more positive than that of made in China products. An opportunity in this study would be a follow up question allowing participants to expand on why and how they were more familiar with the products made in the United States than they were with made in China products. Understanding what factors play a part in their familiarity of a country's products would be beneficial for future studies.

From the quantitative results, 33% of Millennial participants stated that they prefer to shop only domestic fast fashion brands. Millennials are known to be more economically aware and prefer to work with sustainable brands (Landrum, 2017). Sustainable being less waste, better for the environment and the use of recycled product (Bagcraft, n.d.). From this 33%, better

working conditions in manufactories and supporting the United States economy were common themes that were found. It is evident that Millennials who do shop with only United States brands are cautious about where and how the product is made. 5% of Millennials stated that they only shop with imported brands, with lower price being the only theme found. Again, Millennials are highly aware of spending habits, understanding why this 5% would choose to shop with the lower price products.

Overall, identifying the perception of value based on perceived innovativeness, willingness to buy, perceived price, familiarity of countries product, and perceived quality was found to be nonsignificant in the multiple regression; however, directional relationships were distinguished. When analyzed in a multiple regression with every dimension in this study, there were direct relationships with all factors besides familiarity of country's product, which had an inverse relationship. Familiarity of country's product being found to have an inverse relationship was surprising, as previous research has shown that it is common for consumers to view products from their home country greater than that of others (Ha-Brookshire & Yoon, 2012).

In Strašek's (2011) study about the relationship between COO and brand name value, it was found that the brand name value was significantly impacted by the COO. Brand name value in this study was based on dimensions of promotion, price, product, distribution and COO. Determining the dimensions in which is studied against COO to find the impact on value is a key element in these studies. Price and COO are used in this study, which also has three other dimensions that differ from Strašek's (2011) study. Consumers finding that COO impacts their perception of value of brand name in Strašek's (2011) study aligns with this study directional relationships that are found with perception of value.

In a 2015 study, it was found that 8 in 10 Americans consumers preferred American made product, in oppose to imported products. The same study found that more than 60% of these consumers were willing to pay 10% more for products made in America (Consumer Reports, 2015). The goal of this study was to identify the dimensions that consumers find important in fast fashion, as this sector in the retail industry is growing. The fashion industry is constantly changing, from trends to how consumers shop, and retailers and brands must stay current with every change to be competitive. This study identified which dimensions Millennials and older consumers viewed as important when determining what to buy and were to shop. Millennials and the United States had direct relationships with all dimensions: perceived innovativeness, willingness to buy, perceived price, familiarity of products country and perceived quality.

The quantitative data did indicate that some participants did not use COO as a purchasing decision factor and price was a bigger concern. A finding in this study was the perceived priced for the United States having a direct relationship, oppose to the inverse relationship found with China. Retailers who sell American made products, can use this information and retail their products at a higher price. For those consumers who are not concerned about COO or do not look at this factor when making purchases initially, a higher retail for a made in an America product would be justified and understood.

Limitations. In addition, the hypothesis in this study were based on Millennials perception of value, a narrow age window of 23 to 35-year-old consumers. It was important to understand this age group, as their purchasing power continues to grow. There was a total of 165 participants who fell into the Millennial age group, with 131 participants being 36 and older. Each age group

was studied separately, which may be a reason for the nonsignificant multiple regression results. With a larger sample size per each age group, the multiple regression may have resulted in significant results that would have supported the hypothesis.

In future research, a suggestion would be to break the 36 and older participants age group into smaller categories. In this study, the oldest participant was 68, which created a group with 31 different ages. The perceptions of value in fast fashion could be drastically different for a participant who is 36 and one who is 46 and so on. Breaking this group down could help indicate at which age we start seeing the changes of perception of value starting from Millennial participants. With future research, this could be a key element in finding significant results and having a more in-depth understanding of each generation thereafter.

Throughout the study, there was one question that asked participants to explain their initial answer. This open-ended question gave a better insight to understanding the reasoning's behind their answer. More questions that prompt participants to expand their thoughts or reasoning would have given a stronger sense of participants perception of value for fast fashion product. Understanding the "why" to the qualitative questions would have been important information when analyzing this data. For instance, through the quantitative data, some participants listed that the United States had better quality and fit. A question prompting participants to expand thoughts on quality would have been helpful in understanding what their experiences have been with both the United States and China. This information could have also led to knowledge on consumers awareness of where the product was made; if this is something they look for before or after purchase.

Open-ended follow up questions would be helpful after each quantitative question to better analyze each dimension and the participants view of each. Having more qualitative data directly aligned with the quantitative data could help when using the convergent parallel method when confirming or disconfirming the results. In addition, these results can help support any consistent findings between the quantitative and qualitative data.

As mentioned before, this study focused on fast fashion products. There was one question in the survey that asked participants if they preferred to shop with imported, domestic or both fast fashion brands. While this question gave great insight into the participants participation in shopping with fast fashion, adjusting this to ask if they prefer to shop with imported, domestic or both fast fashion products would provide a consistent framework of questions in the survey.

In addition to more open-ended questions, a visual representation of product in given scenarios would also be helpful to have a concise image of the product being described. While participants were given style, price, where it was made and where it was sold, giving a visual will allow for all participants to have the same reference point for the scenario. Perceived price could have been impacted with a visual representation of the describe product, as participants could have different ideas of the product themselves, which could lead to differences in the perceived price. Furthermore, adding in an additional question with an image of a product, where it was sold and made in either the United State or China at different price points, where the United States is retailed higher and China is retailed lower, could determine participants willingness to buy. Future researchers can expand their studies to further understand the consumer and their perception of value in fast fashion.

Implications and Conclusion

The purpose of this study was to establish how COO impacts consumer perception of value in fast fashion. Using an online Qualtrics survey, and Amazon's MTurk to recruit participants, this study was conducted. Both open and closed ended questions were used, including yes/no, scale and multiple-choice answers. The quantitative data was analyzed using multiple regression. This technique allowed directional relationships to be discovered, if there were any, between the variables. Qualitative data was analyzed through coding; finding common words and generating themes from the open-ended questions. Quantitative data was analyzed first, followed by qualitative data. The qualitative data was then used, when appropriate, to confirm or disconfirm the quantitative data. The quantitative results indicated directional lines between the dimensions (perceived innovativeness, willingness to buy, perceived price, perceived quality and familiarity to buy) and COO. The United States had a direct line, or a positive *t* stat, while China had an inverse relationship, or a negative *t* stat. The qualitative data confirmed these directional relationships with perceived price and perceived quality.

A key element in this study for individuals in the industry is the perceived price of made in the United States products. While fast fashion is known for importing a majority of their goods to combat high prices, this study indicated the perceived price for made in the United States products was higher than that of China. Fast fashion brands and companies can use this information to justify decisions in deciding where to source products from and understanding what their consumer is willing to pay more for. Buyers in the industry can warrant paying higher costs and having higher retails, due to the product being made in the United States and knowing their consumer will view the product itself as higher quality.

In addition, familiarity of country's product often comes from advertisements, word-of-mouth or exposure. Marketing personnel and copy writers can use made in the United States to highlight the product when presenting the products to consumers. As found in the research, consumers find themselves being most familiar with products made in their home country, allowing for those in the United States to have a sense of familiarity with the product, how it was made and where it came from. Developing a relationship with the consumer is important as retailers continuously have to compete with each other; creating that bond with made in the United States products can create a buzz around a brand or a company, especially in fast fashion.

Fast fashion is sector in the retail industry that has impacted the way consumers shop and how much they buy. Creating a sense of urgency to have a product now, staying on trend and having a wide assortment allows for top fast fashion companies to create loyalty from consumers. As Millennials continue to grow in purchasing power, these companies will have to adjust to meet the needs and wants of the products being offered. This study highlighted how price is an important factor when making a purchasing decision, and although these participants may view the United States as having a higher perception of value, this did not impact their purchasing behavior. This study was able to identify the importance of being at the right price in fast fashion, as many consumers are shopping this sector of the retail industry.

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Appendix A: Survey Questions

Survey Questions:

- **Do you prefer to buy domestic brands, imported brands or both when shopping with fast fashion retailers and why**? (Wang, C., Siu, N., & Hui, A., 2004)
- **Do you agree to the following statement "I purchase apparel products in stores that carry fast fashion brands** (e.g. H&M, Forever 21, Zara, Gap, etc.)"? (Joung, 2014)
   o Yes
   o No
- *****For the countries listed below, how do you perceive the innovativeness of their products, where innovativeness means the use of new technology and engineering advances?** (Roth & Romeo, 1992)
   o Countries:
      ▪ United States
      ▪ China
   * 7-point scale rating system:
      1. Not innovative
      2. Mostly not innovative
      3. Somewhat not innovative
      4. Neutral
      5. Somewhat Innovative
      6. Mostly Innovative
      7. Very innovative
- ****How willing are you to purchase fast fashion apparel products from the United States (China)?** (Roth & Romeo, 1992)
   ** 7-point scale rating system:
      1. Strongly unlikely
      2. Mostly unlikely
      3. Somewhat unlikely
      4. Neutral
      5. Somewhat likely
      6. Mostly likely
      7. Very likely
- *****How familiar are you with fast fashion apparel products made in the United States (China)**? (Roth & Romeo, 1992)
   *** 7-point scale rating system:
      1. Strongly unfamiliar
      2. Mostly unfamiliar
      3. Somewhat unfamiliar
      4. Neutral
      5. Somewhat familiar

6. Mostly familiar
7. Very familiar
- **How do you feel about fast fashion retailers?** (Collett, Cluver, & Chen, 2013)
- **Approximately how many items of fast fashion products do you purchase a year? (Joung, 2014)**
   1. Fewer than 5 items
   2. 5 - 9 items
   3. 10 - 14 items
   4. 15 - 19 items
   5. 20 - 24 items
   6. 25 - 29 items
   7. 30 - 34 items
   8. 35 - 40 items
   9. 40 – 44 items
   10. 45 or more items
- **How many items of fast fashion products do you dispose of in a year? (Joung, 2014)**
   1. Fewer than 5 items
   2. 5 - 9 items
   3. 10 - 14 items
   4. 15 - 19 items
   5. 20 - 24 items
   6. 25 - 29 items
   7. 30 - 34 items
   8. 35 - 40 items
   9. 40 – 44 items
   10. 45 or more items
- **Would you expect the quality of a pair of Forever 21 jeans, retailed at $12.90, made in the United States (China) to be (select one)? (Acharya & Elliott, 2001)**
   1. Extremely Poor
   2. Very Poor
   3. Poor
   4. Average
   5. Good
   6. Very Good
   7. Extremely Good
- **How likely are you to buy a pair of Forever 21 jeans, retailed at $12.90, made in the United States (China) to be (select one)? (Acharya & Elliott, 2001)**
   1. Definitely Not Buy
   2. Probably Not Buy
   3. Might Buy

        4. Probably Buy

        5. Definitely Buy

- **It's been found out that a typical cotton t-shirt sold in major stores in the US is made out of 100 percent cotton and has a label of 'Made in China.' The average price of this shirt is $40. Compared to a $40 shirt, how much do you believe that other options would cost at a retail store? Please indicate one retail price for each option while considering the sustainability impact of each option**. (Ha-Brookshire & Yoon, 2012)
  - o 100 percent Cotton from the USA (China). Made in USA (China).
- **Given the following scenario, list the maximum retail price you are willing to pay.** (Koschate-Fischer, Diamantopoulos & Oldenkotte, 2012)
  - o Item: Fitted Blazer
  - o Made in the USA
  - o Sold at H&M
- **Given the following scenario, list the maximum retail price you are willing to pay.** (Koschate-Fischer, Diamantopoulos & Oldenkotte, 2012)
  - o Item: Fitted Blazer
  - o Made in the China
  - o Sold at H&M
- **Using a five-point scale (5- strongly agree, 1- strongly disagree), rate the following statements.** (Uddin, Parvin &Rahman, 2012)
  - o The reliability of a fast fashion good is of more importance than COO/COM image.
  - o The durability of a fast fashion good is of more importance than COO/COM image.
  - o The performance of a fast fashion good is of more importance than COO/COM image.
  - o The price level of a fast fashion good is of more importance than COO/COM image.
- ****How much do you believe you have spent on apparel items in the past 12 months**? (Collett, Cluver, & Chen, 2013)
- ****How much of this was on fast fashion items?** (Collett, Cluver, & Chen, 2013)
- **After the following prompt: "Fast fashion retailers encourage consumers to make frequent purchases in their stores by continually bringing in new fashion-oriented clothing items and selling them at low prices", the following questions will be asked:** (Collett, Cluver, & Chen, 2013)
- Is this a good, bad, or neutral thing for consumers?
- Is this a good, bad, or neutral thing for society?
- **How frequently do you shop?** (Wang, C., Siu, N., & Hui, A., 2004)
- **How frequently do you read fashion magazines**? (Wang, C., Siu, N., & Hui, A., 2004)
- **What is your age?**

- **What is your annual income range?**
  - $30,000 and below annually
  - $30,000 to $50,000 annually
  - $50,000 and above annually
  - Prefer not to answer
- **What is your education level**?
  - Undergraduate Degree
  - Master's Degree
  - Doctored Degree
  - No College

APPENDIX B: INFORMED CONSENT FORM

IRB Number #

Study Title: Country of Origin Impact on Consumer Perception of Value in Fast Fashion

Invitation

Dear participant,

My name is Katherine Walter. I am conducting a study on how country of origin can impact consumers perception of value in fast fashion. Perceived value will be determined through studying perceived innovativeness, willingness to buy, perceived price, familiarity of the country's product and quality of product. This study will identify the importance of country of origin in a products perceived value while being tested against other consumer purchasing decision factors. If you are between the ages of 23 and 35 and are located in the United States, you may participate in this research.

Participation in this study will require approximately 15 to 20 minutes You will be asked to complete an online survey. The questionnaire will have a variety of questions including open-ended, scenario and multiple-choice questions. Multiple-choice questions will include multi-point scale and yes or no answers. Open ended questions are asked to find your involvement and thoughts of the fast fashion retail industry. Scenario questions are asked to determine your perspective of a country. Participation will take place on a personal computer or mobile device in your own space.

There are no known risks or discomforts associated with this research, as this is not sensitive in nature.

The results of this study aim to establish if fast fashion apparel made in the United States has a higher perceived value than fast fashion apparel made in China. The information found will provide data to indicate how perception of value is impacted by country of origin. Determining the significance of how country of origin relates to the perception of value in a fast fashion product will provide insight for industry professionals on their consumers expectations of products, allowing better relations between consumer, product and company.

Your responses to this survey will be kept confidential. By using Amazon's Mechanical Turk, your personal information will be stored in their secured data base and only used with consent from you. Identifiable information will not by collected for this survey. All data collected will be kept in a secure Box folder, that only the researches will have access to. The Box folder will not have any identifiable information. This information will be stored for three years in the Box folder, and then permanently deleted. The aggregate results will be used for a thesis and potential publications/manuscripts and the anonymous data may be shared as needed based on publishing requirements.

You may ask any questions concerning this research and have those questions answered before agreeing to participate in or during the study.

For study related questions, please contact the investigators:
Katherine Walter: Katherinewalter@hotmail.com
Jennifer Johnson Jorgensen: jbjorgensen@unl.edu

For questions concerning your rights or complaints about the research contact the Institutional Review Board (IRB):

- Phone: 1(402)472-6965
- Email: irb@unl.edu

You will receive $0.15 payment for your participation once the questionnaire has been completed. This payment will be accessible to you on your Amazon Mechanical Turk dashboard and earnings page once your questionnaire has been approved. You will be able to transfer this payment to your bank account when you desire.

You can decide not to be in this research study, or you can stop being in this research study ("withdraw') at any time before, during, or after the research begins for any reason. Deciding not to be in this research study or deciding to withdraw will not affect your relationship with the investigator or with the University of Nebraska-Lincoln (list others as applicable).

You will not lose any benefits to which you are entitled.

Documentation of Informed Consent

You are voluntarily making a decision whether or not to participate in this research study. By clicking on the I Agree button below, your consent to participate is implied. You should print a copy of this page for your records.

I agree		I do not agree

APPENDIX C: IRB APPROVAL LETTER

Official Approval Letter for IRB project #19669 - New Project Form
October 10, 2019

Katherine Walter
Department of Textiles, Merchandising & Fashion Design

Jennifer Johnson Jorgensen
Department of Textiles, Merchandising & Fashion Design
HECO 205 UNL NE 685830802

IRB Number: 20191019669EX
Project ID: 19669
Project Title: Country of Origin Impact on Consumer Perception of Value in Fast Fashion

Dear Katherine:

This letter is to officially notify you of the certification of exemption of your project for the Protection of Human Subjects. Your proposal is in compliance with this institution's Federal Wide Assurance 00002258 and the DHHS Regulations for the Protection of Human Subjects at 45 CFR 46 2018 Requirements and has been classified as exempt. Exempt categories are listed within HRPP Policy #4.001: Exempt Research available at: http://research.unl.edu/researchcompliance/policies-procedures/.

o Date of Final Exemption: 10/10/2019
o Review conducted using exempt category 2a at 45 CFR 46.104
o Funding (Grant congruency, OSP Project/Form ID and Funding Sponsor Award Number, if applicable): N/A Investigators personal funds

You are authorized to implement this study as of the Date of Final Approval: 10/10/2019.

We wish to remind you that the principal investigator is responsible for reporting to this Board any of the following events within 48 hours of the event:
* Any serious event (including on-site and off-site adverse events, injuries, side effects, deaths, or other problems) which in the opinion of the local investigator was unanticipated, involved risk to subjects or others, and was possibly related to the research procedures;
* Any serious accidental or unintentional change to the IRB-approved protocol that involves risk or has the potential to recur;
* Any protocol violation or protocol deviation
* An incarceration of a research participant in a protocol that was not approved to include prisoners
* Any knowledge of adverse audits or enforcement actions required by Sponsors
* Any publication in the literature, safety monitoring report, interim result or other finding that indicates an unexpected change to the risk/benefit ratio of the research;
* Any breach in confidentiality or compromise in data privacy related to the subject or others; or
* Any complaint of a subject that indicates an unanticipated risk or that cannot be resolved by the research staff.

This project should be conducted in full accordance with all applicable sections of the IRB Guidelines and you should notify the IRB immediately of any proposed changes that may affect the exempt status of your research project. You should report any unanticipated problems involving risks to the participants or others to the Board.

If you have any questions, please contact the IRB office at 402-472-6965.

Sincerely,

Jenn Klein
for the IRB