Apparel Shopping Patterns and Problems Among Children's Wear Consumer

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The creation of a baby boomlet has had a tremendous impact on consumer demand, and in particular, for children's apparel. During the late 1980's, the children's wear market experienced steady growth. Nonetheless, the needs and wants of this market segment have not been fully explored. This research was undertaken in order to develop a better understanding of the product attributes important to the children's wear customer, as well as, shopping and apparel problems encountered with children's wear.

Introduction

A number of socio-economic and demographic factors have a tremendous effect on the purchasing and consumption patterns of households in the United States. These factors range from the aging of the population to the formation of non-traditional households to the bearing of children by baby boomers. Not since the 1950's and 60's has the birth rate been as high as it has been in the late 1980's and early 1990's. In 1990 there were 4.1 million births in the United States, a number that was higher than anticipated by the Census Bureau. This baby boomlet, or echo boom, has an impact on the demand for goods and services in the marketplace. Markets particularly affected by this surge in the youth population include specific food products, toys and children's apparel. In 1991, the children's apparel market grew to $20.3 billion in sales. Although this was only a .3 percent increase over 1990, children's wear outperformed many other apparel segments during this recessionary period. This growth also came on the heels of rather astounding growth during the late 1980's. Although the children's wear market provides a potential opportunity for businesses interested in satisfying the needs and wants of this market segment, it is a frequently overlooked market. Not only do apparel marketers tend to focus on their traditional mainstays (eg. women's wear), academic research has also neglected this area.

Retailers' views regarding the children's wear customer have been surveyed periodically by a major trade publication (Earnshaw's). Typically, the survey will ask a question such as "What do you perceive is your customers' greatest dissatisfaction with children's wear?" The results from the most recent survey (Earnshaw's Review, 1992) are shown in Table 1.

Table 1
Retailers View of Consumer Problems

	Dept. Store	Discount Store	Specialty Chain	Indep. Specialty
SIZING NOT UNIFORM	43	21	38	55
PRICE	24	29	38	39
QUALITY	19	21	25	--
LACK OF SERVICE	14	21	12	6
LACK OF BRANDS	--	8	--	--
LACK OF FASHION DIRECTION	--	--	--	--

(EARNSHAW'S, JUNE 1992, P. 56)

These results suggest that retailers perceive sizing and price to be the children's wear customers' greatest problems. An interesting question that arises is "Do these results reflect what consumers believe to be their greatest problems when purchasing children's wear?" Additionally, "What problems do consumers encounter after purchasing children's wear?" It was the purpose of this research to address these questions. The specific objectives were:

1. To identify product attributes that are important to customers when purchasing children's wear.

2. To determine problems customers encounter when shopping for children's wear.

3. To determine problems customers encounter after purchasing children's wear.

Apparel manufacturers have been criticized for lacking a marketing orientation-that is-failing to understand the needs and wants of their customer and satisfying them (Carideo, 1985). Insight gained through this research will be useful to both apparel manufacturers and retailers in better serving this market segment. In addition, the data collected for this study will also be useful in

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addressing consumer behavior issues of interest to academic researchers.

Literature Review

Despite the fact that the children's wear market experienced substantial growth during the 1980's, much of the research on purchasing behavior for children's wear was conducted prior to 1980. These studies address evaluative criteria and store choice. Shopping and apparel problems have not been addressed by previous researchers.

Findings from a study of 100 families located in the Eastern United State (Blake, Glission and Tate, 1953) found that durability and price, respectively, were the first and second most important factors considered by homemakers when purchasing children's wear. The results indicated that homemakers seldom bought children's clothing based on brand name. Homemakers in the highest income group, and those with more formal education, had a greater tendency to buy based on brand name.

Joyce (1966), in a study of 236 families, found that quality was the most important factor to the upper income group when buying children's wear. The middle income group considered price and quality as important factors. The lower income group cited price as their first priority.

Frankenbach (1970) asked a sample of mothers to rank seven factors--easy care finish, price, care instructions, fiber content, garment brand name, fiber brand name, and fiber generic name. The two top ranked factors (easy care and price) were in reverse order depending on the mothers' employment status. Employed mothers ranked easy care finish as more important than price; their unemployed counterparts placed greater importance on price.

Blake et. al (1953) found that families with a homemaker most frequently purchased children's wear in department stores followed by mail-order purchases. Frankebach (1970) found that the department store was most frequently used by all households in her sample. Mail order was second.

Theoretical Model

The Engel, Blackwell and Miniard (EBM) model of consumer behavior was the theoretical model used to guide the development of the survey instrument used in this research (See Figure 1).
This model emphasizes the consumer decision making process and the variables influencing the decision process. Consumer decision making is viewed as consisting of five basic steps: problem recognition, search, alternative evaluation, purchase, outcomes, and postpurchase evaluation (satisfaction/dissatisfaction).

Engel et al. (1986) suggested that problem recognition occurs when an individual senses a difference between what he or she perceives to be the ideal state of affairs as compared to the actual state of affairs at any point in time. After the individual recognizes a problem, he or she continues with the decision making process.

The second step is the search process. Internal search (memory) and external search (seeking information from outside sources) occurs. This is followed by the third step-alternative evaluation.

Alternative evaluation has three components -- beliefs, attitudes and intentions. Engel et al. (1986) explained that the foundation of beliefs is evaluative criteria-the standards and specifications used by consumers to compare and evaluate different products and brands. Beliefs about alternatives form attitudes, such as "acceptable" or "unacceptable." Attitude leads to intention which is directly linked to actual purchase behavior.

The purchase is made after evaluating the alternatives identified by the consumer. Purchase occurs primarily in the retail store setting; however, non-store forms of retailing may also be used. After the purchase, the consumer compares product performance against his/her expectations.

Dissatisfaction occurs if performance is less than expected. Dissatisfaction affects one's beliefs and attitudes about the choice in an unfavorable manner, whereas, satisfaction strengthens the belief and attitude about the product and/or store in a favorable way.

Variables that are believed to influence the decision process include 1) individual characteristics, 2) social influences and 3) situational influences.

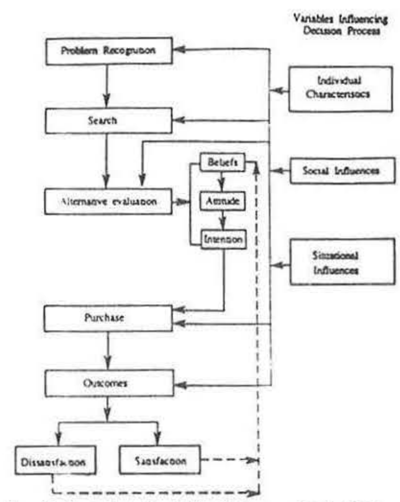

Figure 1 Engel, Blackwell and Miniard's Consumer Behavior Model

Research Approach

The focus of this research was on households with children ages 10 and under. This limitation was placed on the sample for a number of reasons. First, children of different ages have varying clothing needs. As a result, parents will look for different attributes in apparel depending on the age of the child; they will also encounter different types of problems in the purchase and use of children's apparel. Second, as children become older, they become much more involved with the decision making process regarding their clothing choices. As a result, two different points of view (the childs' and the parents') would need to be considered in understanding the pre-teen and teenage market. Third, the needs and wants of consumers with younger children have not been adequately addressed in previous research.

To carry out this research, a pilot study was conducted in June 1991. Based upon background reading, interviews with a number of mothers regarding the issues at hand, and personal knowledge, a survey instrument was developed. To pretest the questionnaire, the kindergarten enrollment list from one midwestern school district was used as the sampling frame. From the kindergarten enrollment list, 400 households were randomly selected. A questionnaire and self-addressed, stamped, return envelope were delivered to each household. One hundred and thirty-one households responded resulting in a 32% response rate. Based on the results of the pilot study, the same revisions were done to the questionnaire.

In March 1992, the full scale study was carried out using households with either a kindergartner or fourth grader present. Eleven school districts in one midwestern state provided the enrollment lists for these two grades. Two thousand households were randomly selected-1000 kindergarten families and 1000 fourth grade families. Seventy-one surveys were undeliverable. A follow-up postcard, followed by a second survey for non-respondents were sent after the initial mailing (Dillman). There were 953 surveys returned, for a response rate of 49% (based upon deliverable surveys).

The survey that was used for this study contained four sections. The various components of the consumer decision making model were considered in developing the instrument. Specifically, store patronage, evaluative criteria, shopping and apparel problems, satisfaction/dissatisfaction and complaint behavior were addressed. Section I of the questionnaire addressed issues related to the shopping experience. Respondents provided information on clothing acquisition sources; retail store patronage; evaluative criteria; satisfaction with their shopping experiences for children's clothes; and shopping problems. Section II of the survey pertained to clothing purchase practices; satisfaction with the quality of clothes they can buy for their youngest child; and apparel problems.

Section III asked information about clothing purchases in the previous year, and for those items with which they experienced dissatisfaction, their response to the problem. Section IV contained questions regarding respondent and household characteristics.

Sample

Tables 2-5 provide descriptive statistics for the sample. As can be seen in Table 2, the majority (95.4%) of the respondents are female.

Table 2
Sex, Race and Marital Status of the Respondent

CATEGORY	NUMBER	PERCENT
SEX OF RESPONDENT		
FEMALE	902	95.4
MALE	43	4.6
TOTAL	945	100.0
RACE		
CAUCASIAN	789	84.9
AFRO-AMERICAN	102	11.0
ASIAN	11	1.2
HISPANIC	6	0.6
OTHER	21	2.3
TOTAL	929	100.0
MARITAL STATUS		
MARRIED	731	77.2
DIVORCED	132	13.9
SEPARATED	29	3.1
NEVER MARRIED	45	4.8
WIDOWED	10	1.1
TOTAL	947	100.0

Almost 85% of the respondents are Caucasian and 11% are Afro-american. Seventy-seven percent of the respondents are married, while 17% are divorced. Over 90% had at least a high school education and 70% had some type of educational training beyond high school (Table 3). Slightly over 64% were employed with an average salary of $18,549. Over 50% of the households had a total household income of less than $40,000 with an average family size of 4.27 people (Table 4).

Table 3
Education, Employment Status and Salary of the Respondent

CATEGORY	NUMBER	PERCENT
EDUCATION		
LESS THAN HIGH SCHOOL	60	6.3
COMPLETED HIGH SCHOOL	222	23.4
SOME COLLEGE OR VOCATIONAL TRAINING	269	28.4
COMPLETED VOCATIONAL TRAINING	80	8.4
COMPLETED COLLEGE	163	17.2
SOME GRADUATE WORK	68	7.2
A GRADUATE DEGREE	85	9.0
TOTAL	947	100.0
EMPLOYMENT STATUS		
EMPLOYED	609	64.4
UNEMPLOYED	337	35.6
TOTAL	946	100.0

RESPONDENTS' AVERAGE SALARY: $18,549

Table 4
Income and family size of the respondents' household

CATEGORY	NUMBER	PERCENT
INCOME		
< $10,000	97	11.2
$10,000-19,999	111	12.8
$20,000-29,999	136	15.7
$30,000-39,999	150	17.4
$40,000-49,999	124	14.4
$50,000-59,999	97	11.2
$60,000-69,999	56	6.5
$70,000-79,999	24	2.8
$80,000-89,999	21	2.4
$90,000-99,999	14	1.6
OVER $100,000	34	3.9
TOTAL	864	100.0

AVERAGE FAMILY SIZE: 4.27

Besides providing information on selected household characteristics, respondents were asked to answer a series of questions using their youngest child as a point of reference. This was done for two reasons. First, responses could vary for different children (if more than one was present in the household). Second, the survey would be too long if respondents were asked to provide information in regard to each child in their household. As can been seen in Table 5, the sample was pretty evenly split between boys and girls. In terms of the age distribution of the youngest child, one-third are under the age of four, and almost half are six or older.

Results

This section presents the results, based on simple descriptive statistics, for consumer responses regarding their apparel shopping patterns and problems. The various acquisition forms used by consumers to obtain both playwear and dresswear are presented. Results for evaluative criteria consumers consider important when purchasing children's playwear, as well as, shopping and apparel problems they encounter are presented and discussed. Since responses regarding play wear and dress wear may vary, respondents were asked to provide responses in reference to playwear only.

Table 5
Sex and Age Distribution of the Youngest Child

CATEGORY	NUMBER	PERCENT
SEX DISTRIBUTION		
BOYS	481	50.7
GIRLS	468	49.3
TOTAL	949	100.0
AGE DISTRIBUTION		
0-23 MONTHS	101	10.6
24-47 MONTHS	121	12.7
48-71 MONTHS	176	18.5
72-95 MONTHS	270	28.3
96-119 MONTHS	104	10.9
120+ MONTHS	181	9.0
TOTAL	953	100.0

Table 6
Sources of Clothing Acquistion

CATEGORY	NUMBER	PERCENT
BUY NEW	915	96.6
GIFTS	654	69.1
HAND-ME-DOWNS	513	54.2
GARAGE SALES	414	42.8
CATALOGS	315	33.3
BUY USED	216	22.8
SEW	182	19.2
CHARITY	17	1.8

Respondents were asked to indicate the various sources from which they acquire children's wear, as well as, specific types of stores from which they purchase both playwear and dresswear. This is an important facet of the decision process for marketers to understand. It may come as a surprise to many children's wear retailers that a number of sources are used by consumers. In looking at Table 6, one can see that many non-traditional retail outlets provide competition for traditional retailers, particularly garage sales. Purchasing clothes at garage sales and used clothing stores are ways for consumers to truly get name brand merchandise at low prices. It is also a signal to consumers that they are purchasing clothes that have already stood the test of time. Table 7 shows the important role that discount stores play in the purchase of playwear. The results also indicate that parents will trade up when purchasing dress wear for their children.

Table 7
Retail Store Patronage

PLAYWEAR	DRESSWEAR	RETAIL STORE
(PERCENTAGES)		
91.1	62.7	DISCOUNT STORE
55.3	62.4	MASS MERCHANDISER
27.8	41.3	DEPARTMENT STORE
9.1	13.5	SPECIALTY STORE
28.2	23.8	FACTORY OUTLET
30.4	24.6	CATALOG ORDER
21.9	15.2	USED CLOTHING STORE

Based on the Engel, Blackwell and Miniard model of consumer behavior, consumers will utilize any number of evaluative criteria for products they purchase. Given the lack of recent research on the purchase process for children's wear, one goal of this research was to develop an initial understanding of the relative importance of various product attributes in the purchase of children's play wear. Respondents were asked to rate 17 different factors that consumers may consider when purchasing children's play wear. A 4-point scale was used. Table 8 shows the ranking based on mean values (with a lower mean indicating greater importance). The results suggests that parents will not buy an item that doesn't fit their child, or that appears uncomfortable (no matter how inexpensive). However, if the first two criteria are satisfied, then price becomes an important consideration. The fashion aspects of the garment appear to be secondary considerations. Brand name was found to be the least important consideration. This is in direct contrast to other apparel market segments (eg. women's wear) where research has shown brand name to be an important consideration.

Table 8
Factors Consumers Consider When Purchasing Playwear

MEAN VALUE	CHARACTERISTIC
PRIMARY CONSIDERATIONS	
1.20	COMFORT
1.21	FIT
1.27	PRICE
1.34	QUALITY
1.35	DURABILITY
1.39	EASY CARE
SECONDARY CONSIDERATIONS	
1.76	STYLE
1.79	FASHION
1.80	MIX & MATCH
1.85	GROWTH FEATURES
1.96	COLOR
LEAST IMPORTANT CONSIDERATIONS	
2.04	STORE REPUTATION
2.05	MADE IN AMERICA
2.10	FIBER CONTENT
2.12	STORE SERVICE
2.38	SELF-HELP FEATURES
2.94	BRAND

To understand the extent to which the needs and wants of the children's wear consumer are being met in the marketplace, it is important to identify problems that customers encounter with both the shopping experience, and apparel products themselves. Respondents were asked to rate 22 shopping problems and 19 apparel problems using a 4-point scale. The lower the score, the greater the problem. Table 9 presents the mean values for the shopping problems; it appears that high prices are the greatest problem consumers encounter when shopping for children's clothes. Sizing/fit related problems are also troublesome. To understand the sizing/fit problem better, respondents were asked the following question: If you were to buy clothes that corresponded to your youngest child's age, would the clothes usually FIT JUST RIGHT, BE TOO BIG, OR BE TOO SMALL? Almost 45% responded that the clothes would be too small. Only 26.5% said they would fit just right. Sizing/fit problems were found to encompass issues such as inconsistent sizing among brands, lack of sizes that matches the childs' age, disproportionate fit, lack of body measurement and sizing information, and lack of transitional sizes.

Table 9
Shopping Problems

MEAN VALUE	PROBLEM
1.51	HIGH PRICES
2.18	INCONSISTENT SIZING AMONG BRANDS
2.30	NARROW AISLE SPACE
2.31	LIMITED CHOICES FOR BOYS
2.33	LACK OF BODY MEASUREMENT AND SIZING INFORMATION
2.36	TOO MANY CARTOON CHARACTERS
2.39	LACK OF AMERICAN MADE CLOTHES
2.40	DISPROPORTIONATE FIT
2.43	LACK OF STYLES I LIKE
2.47	LACK OF SIZES THAT MATCH THE CHILDS' AGE
2.54	LACK OF TRANSITIONAL SIZES
2.60	STYLES NOT APPROPRIATE FOR AGE
2.73	LIMITED COLOR CHOICES
2.72	LACK OF MIX AND MATCH ITEMS
2.87	LACK OF CHILDREN'S PLAY AREA
2.93	LACK OF SLIM/PETITE SIZES
3.24	LACK OF HUSKY/LARGE SIZES
3.33	LACK OF BRAND NAMES

Table 10 presents the mean values for the apparel problems. Staining appears to be a major problem once the apparel has been purchased and worn. In addition, factors related to the durability/quality of garments appear to present problems after purchase.

Table 10
Apparel Problems

MEAN VALUE	PROBLEM
1.95	GARMENT STAINS EASILY
2.13	SOCKS LOSE ELASTICITY
2.18	SEAMS FALL APART
2.19	GROWS OUT OF GARMENT TOO FAST
2.22	GARMENT SHRINKS
2.23	GARMENT FADES
2.24	GARMENT ISN'T DURABLE
2.31	GARMENT LACKS GROWTH FEATURES
2.14	NECK HOLE GETS TOO SMALL
2.52	GARMENT NEEDS IRONING
2.56	FASTENER DOESN'T WORK
2.72	STRAPS AREN'T EASILY ADJUSTABLE
2.85	GARMENT IS UNCOMFORTABLE
2.89	GARMENT DOESN'T ALLOW CHILD TO USE POTTY
2.98	GARMENT DOESN'T ALLOW CHILD TO DRESS SELF
3.19	SOCKS CUT OFF CIRCULATION
3.46	GARMENT LACKS SNAPS FOR CHANGING DIAPERS
3.53	GARMENT LACKS ROOM FOR DIAPERS

Taking a closer look at these results, one might consider how responses vary based on the age and sex of the child. With respect to shopping problems, it appears that the greatest difference between parents of boys and girls is the limited selection of choices for boys (See Table 11).

Table 11
Shopping Problems Based on the Sex of the Youngest Child, Mean Values

BOYS		GIRLS	
HIGH PRICES	1.54	HIGH PRICES	1.47
LIMITED SELECTION	1.70	INCONSISTENT SIZING	2.17
INCONSISTENT SIZING	2.19	NARROW AISLE SPACE	2.31
LACK OF SIZE INFO.	2.32	LACK OF SIZE INFO.	2.34
LACK OF STYLES	2.32	CARTOON CHARACTERS	2.40
CARTOON CHARACTERS	2.33	LACK OF MADE IN USA	2.40
DISPROPOR-TIONATE FIT	2.37	DISPROPOR-TIONATE FIT	2.43
LACK OF USA MADE	2.37	LACK OF TRANSIT. SIZES	2.46
SIZES DON'T MATCH AGE	2.46	SIZES DON'T MATCH AGE	2.47
LACK OF TRANSIT. SIZES	2.62	INAPPROPRIATE STYLES	2.53
LIMITED COLOR CHOICES	2.65	LACK OF STYLES	2.54
INAPPROPRIATE STYLES	2.67	LIMITED SELECTION	2.70

Based on the age of the youngest child, it appears that there are a number of shopping and apparel problems that are unique to consumers with young children. The shopping problems include lack of aisle space (presumably for strollers and carts), and lack of a play area (Table 12).

Table 12
Shopping Problems Based on the Age of the Youngest Child, Mean Values

	SHOPPING PROBLEM	
AGE	NARROW AISLES	LACK OF PLAY AREA
0-23	1.99	2.47
24-47	2.13	2.52
48-71	2.28	2.65
72-95	2.37	2.87
96-119	2.57	3.30
120+	2.36	3.28

Apparel problems included neck openings that are too small (stemming from the fact that babies/toddlers heads are large relative to the rest of their body) and diaper related problems (Table 13). Diaper related problems included lack of room for diapers, as well as, a lack of snaps on garments to facilitate changing diapers. This latter one is a common problem since most manufacturers of toddler clothing (sizes 2T, 3T and 4T) do not include snaps on one piece outfits (such as overalls). However, most children are not potty trained until the age of 2, and sometimes 3. Thus, changing diapers can become quite a nuisance in garments without snaps.

Table 13
Apparel Problems Based on the Age of the Youngest Child, Mean Values

	APPAREL PROBLEM		
AGE	NECK TOO SMALL	NO SNAPS FOR DIAPERS	NO ROOM FOR DIAPERS
0-23	1.92	2.39	2.49
24-47	1.99	2.96	3.21
48-71	2.24	3.55	3.64
72-95	2.43	3.70	3.74
96-119	2.74	3.92	3.90
120+	2.92	3.69	3.70

Conclusions And Implications

The intent of this research was to provide preliminary insight into the children's wear market that can serve as a foundation for further investigation. It is apparent, based on the results presented in this paper, that the needs and wants of customers are not being fully met by apparel retailers or manufacturers.

In understanding the children's wear market, it is important to realize that the actual consumer of children's wear (which is typically not the purchaser) differs from the adult apparel consumer in a number of ways. The growth and development of children results in the need for a fairly rapidly changing inventory of clothes. Since new clothes are continuously needed as the child grows, the typical parent does not want to invest a lot of money in children's apparel, especially playwear. Consequently, parents may not buy the highest quality clothes even if they could "afford" them. Parents do, however, expect the clothes to hold up and perform well for the relatively short time period that a child wears them. If there is more than one child in the family, then they may also want other children to wear the clothes as well.

Regarding implications for apparel manufacturers and retailers, it appears that staining is a problem that it may be well to address. The economic feasibility and consumer acceptance of stain resistant finishes on children's garments is an opportunity that deserves exploration. Additionally, updating the sizing standards currently in use (and developed over 30 years age) needs to be given serious consideration. An increased emphasis on separates and growth features may help alleviate some problems related to disproportionate fit and growing out of a garment too fast. Additionally, improved designs for, and variety of, boys' wear may be an area of potential opportunity.

Within the store setting, the retailer who provides an increased selection of boys' wear (at all age levels) may find themselves at a competitive advantage in serving the needs of this market segment. It is an idea worth testing. In addition, as stores are built or redesigned, wider aisles in the infant/toddler area should be considered. This will mean a loss of selling space, but the trade-off may be that more customers will enter the area rather than bypassing it. As retailers make purchases from manufacturers, or develop their own private label merchandise, there are a number of factors worth considering. One is the need to keep the prices of play wear low. The clothes also need to be reasonably durable. A wide selection of mix and match separates may be one approach to satisfying a number of needs related to children's wear.

Although the results presented in this research are based on simple statistics, it is important to have a basic understanding of the children's wear consumer in terms of their needs and wants before proceeding with more sophisticated and indepth analyses. Future research that builds upon the work presented here will include: 1) an indepth analysis of store patronage and its determinants; 2) characteristics of respondents (and their children) who encounter various types of shopping and apparel problems; and 3) further exploration of the nature of specific problems such as fit and sizing. Clearly, there are many issues that are yet to be addressed; however, the information presented here does provide apparel marketers with some direction regarding issues they need to begin to consider in order to better serve the children's wear market.

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