FASHIONING KENYA

Louise Edwinsson, Annica Nilson

- A study of Kenya as a market for domestic fashion brands
Acknowledgements

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Louise Edwinsson & Annica Nilson
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Författare: Louise Edwinsson, Annica Nilson

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Syftet med denna uppsats är att genom en fältstudie kvalitativt undersöka hur man kan utveckla ett starkt inhemskt modevarumärke på den kenyanska marknaden och ge underlag för detta till människor involverade i mode i Kenya. De största upptäckter för denna uppsats är; den massiva second hand handeln och dess effekter på den inhemska modeindustrin, den mindre utvecklade marknads- och modeindustrin, det växande intresset för mode och det låga förtroendet konsumenter har för de inhemska varumärkena.

Nyckelord: Kenya, mode, varumärkesbyggande, kulturella influenser, estetik
Abstract

**English title**: Fashioning Kenya - A study of Kenya as a market for domestic fashion brands

**Swedish title**: Mode i Kenya – En studie om Kenya som marknad för inhemska modevarumärken

**Authors**: Louise Edwinsson, Annica Nilson

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The fashion industry in Kenya is slowly growing. The middleclass is getting bigger and the interest for fashion among these consumers is increasing. One major problem for the growth of the industry is the extensive second hand trade, which has given several problematic affects. The textile production has almost disappeared, the western influences are evident and the consumer’s price sensitivity is prominent.

The aim of this thesis is, by conducting a field study; to qualitative examine how to develop a strong domestic fashion brand on the Kenyan market and to give a foundation for a branding strategy for people involved within fashion in Kenya. Some of the major findings for this thesis are; the excessive second hand trade and its negative affect on the domestic fashion industry, the less developed fashion environment, the growing interest for fashion among Kenyan consumers and the low credibility the consumers have for domestic brands.

**Keywords**: Kenya, fashion, branding, cultural influences, aesthetics
# Table of contents

1 Introduction .............................................................................................................. 1  
  1.1 Problem background .......................................................................................... 1  
  1.2 Problem discussion ............................................................................................ 3  
  1.3 Research questions ........................................................................................... 3  
  1.4 Purpose ............................................................................................................. 4  
  1.5 Delimitation of problem .................................................................................... 4  
  1.6 Outline of the report .......................................................................................... 4  
2 Theoretical framework ............................................................................................... 6  
  2.1 The company’s macro environment ................................................................... 6  
      2.1.1 Demographic forces .................................................................................. 6  
      2.1.2 Economic forces ...................................................................................... 7  
      2.1.3 Natural forces ......................................................................................... 7  
      2.1.4 Technological forces ............................................................................... 7  
      2.1.5 Political forces ....................................................................................... 8  
      2.1.6 Cultural forces ....................................................................................... 8  
  2.2 The brand identity planning model ..................................................................... 8  
      2.2.1 Brand as Product ..................................................................................... 9  
      2.2.2 Brand as Organization .......................................................................... 10  
      2.2.3 Brand as Person ..................................................................................... 10  
      2.2.4 Brand as Symbol ................................................................................... 11  
      2.2.5 Brand identity as value proposition ....................................................... 11  
  2.3 Key determinants of perceived brand quality .................................................... 12  
      2.3.1 The dimensions ....................................................................................... 14  
3 Methodological discussion ....................................................................................... 16  
  3.1 Scientific main approach ................................................................................... 16  
  3.2 Method of theoretical research ........................................................................ 16  
  3.3 Research purpose ............................................................................................. 16  
  3.4 Research method .............................................................................................. 16  
  3.5 Data collection .................................................................................................. 17  
  3.6 Respondent selection method .......................................................................... 18  
4 The fashion industry ................................................................................................. 19  
  4.1 The Kenya fashion consumer .......................................................................... 19  
      4.1.1 Analysis ................................................................................................... 20  
  4.2 Working in the industry .................................................................................... 20  
      4.2.1 Analysis ................................................................................................... 22  
  4.3 Development and possibilities ......................................................................... 23  
      4.3.1 Analysis ................................................................................................... 24  
5 The contemporary dress code .................................................................................. 25  
  5.1 Inspiration and influences ................................................................................. 25  
      5.1.1 Analysis ................................................................................................... 28  
  5.2 Way of dress .................................................................................................... 29  
      5.2.1 Analysis ................................................................................................... 31  
6 Contemporary success factors ............................................................................... 33  
  6.1 To access and to know your market ................................................................. 33  
      6.1.1 Analysis ................................................................................................... 34  
  6.2 Importance of quality and trust ....................................................................... 35  
      6.2.1 Analysis ................................................................................................... 37  

V
6.3 Reach out to the customer .................................................................................. 37
  6.3.1 Analysis ........................................................................................................ 39

7 Conclusions ........................................................................................................... 40

8 Final discussion ...................................................................................................... 42
  8.1 Validity and reliability ...................................................................................... 42
  8.2 Critics of sources .............................................................................................. 43
  8.3 Our thoughts and recommendations .............................................................. 43
  8.4 Further research .............................................................................................. 44

References ............................................................................................................... 45

Appendix 1 .............................................................................................................. 48

Appendix 2 .............................................................................................................. 49
1 Introduction

This study is the result of our fieldwork in Kenya; we went there as part of our studies as we took part in the schools program for international exchange, the Dignity IV – Human Implications project. Besides the two of us, the Kenyan delegation consisted of two more students: Netta Lönnqvist and Johanna Milvert, and the result of our shared Kenyan experience has been presented in the report *Dignity IV - Kenyan Fashion Identity - A study of ethnicity, identity and culture in a new era of globalization* (Edvinsson et al., 2009). Early on we decided that our thesis subject should be in line with the goal for the Dignity IV project and hence part of our input to the Dignity report is based on the work presented here.

1.1 Problem background

From a western perspective it is easy to see the connections between colonialism, post colonialism and African aesthetics. It has been argued that the colonial experience in Kenya has not negatively influenced economic and social issues of insecurity. (Holmertz, 2009) Since the independence in 1963, Kenya has had one of the strongest economic growths in East-Africa despite problems with corruption. During the 1990’s the growth was less significant than the increase of population and a result of this was a lower living standard for a large part of the population. The growth stood still and big reforms were realized together with the Central bank of Kenya, IMF (International Monetary Foundation) and the World Bank. For example they decided to privatise some public companies and removed the control for the price setting. After this the growth slowly started to pick up. (Rundquist, 2009)

The most important industries in Kenya are agriculture, tourism and manufacturing. The economic climate is dependent on both weather conditions and the current political environment. The election in 2007 with the following violence had a big impact upon the economy in Kenya. Despite the pick-up in growth, this is not as big as it needs to be, in comparison to the growing population, that today is consisting of 38 million inhabitants. (Rundquist, 2009) Kenya has a GNP/ inhabitant of USD 1240 and GNP/ capita of –0,1. In comparison to a western country, like Sweden, these numbers show a low purchasing power, and a slightly slow economic growth compared to the increased number of inhabitants. (Sida, 2009) As Holman (2008) writes in Financial Times, Kenya still struggles with poverty and slow economic pick-up. More than half of the population lives in poverty and the unemployment, due to a shortage in job opportunities, is growing.

Kenya is a country of great social and cultural diversity. The British missionaries and colonialists of the early 18th century made up strict rules according to which the ethnic groups were not allowed to wear their traditional outfits. According to Rabine (2002), the consequence of this was that a gap in the society was created and that it was filled by western cultural attitudes. But even though the west has a strong influence on the culture and identity of the Kenyan people one should keep in mind that there are more than 40 tribes and ethnic groups in the country. The ethnic groups of Kenya all have traditions and symbols of their own in the shape of pottery, masks, clothing and building technique. It is believed that Kenyans tend to identify primarily with their tribe or ethnic group. (Rabine, 2002)

Despite the great number of different ethnic groups and diverse cultural formulas, recent studies indicate that a growing number of Kenyans believe in democracy and that they feel
committed to the national identity. (Bratton & Kimenyi, 2008) To strengthen the Kenyan national character, there have been some recent attempts to come up with a national dress. The creation of the outfit was believed to create an image and feeling of internal unity as well as be useful in a representational purpose when Kenyans would go to international meetings. The leaders in the movement to create the outfit, reporter Sylvia Mudasia and businesswoman Margaret Akumu Gould, illustrate their project as follows:

Kenyans should get away from dressing in other people’s designs and come up with something that is truly our own (Rabine, 2002, p. 102).

The quotation above shows an existing quest to establish Kenyan aesthetics and move away from western influences. In spite of the ambitious character of the project the majority of Kenyans has not accepted the national dress. It is speculated that the failure of the project shows the difficult nature of Kenyans' cultural identity where the wealthier part of the population were involved in the process, thus making the outfit unappealing to the mass. (Rabine, 2002)

Domestic textile industry and cotton production has existed since the early 1900’s and cotton was until the 1980’s the leading manufacturing industry in Kenya. But this has changed considerably during the 1900’s. Despite the efforts from the government a great decline started in the mid 1980’s as a result of the massive donation of clothes from the western countries. These ended up in second hand markets known as “Mitumba” and in the year of 1990 the cotton industry had collapsed. (EPZA, 2005) The previous occupancy of a textile industry in Kenya showed signs of an early industrialization, since it is a very labor-intensive business (Engvall, 2008). But the absence of the industry today shows a reality where the second hand trade has extinguished a domestic fashion industry.

The report “Who do you wear? – Kenya in Second Hand” by Hall and Persson (2006), describes the correlation between the second hand trade and the lack of domestic fashion. The few Kenyan fashion brands that exist contend to survive since they cannot compete with the cheap second hand clothes. The study shows that the domestic fashion industry in Kenya suffers great problem with communicating the value of the Kenyan design to the consumers, and raises questions how to raise the interest and crave for Kenyan fashion amongst the population. (Hall & Persson, 2006)

Another study that relates to the problem discussed is “The impact of the second-hand clothing trade on developing countries “ by Baden and Barber (2005). The report argues that the second hand trade has caused people in developing countries not to buy domestic fashion. Further, the authors states that almost all socio-economic groups are choosing to shop second hand and consumption patterns have in general changed from locally customized goods to foreign imported goods. (Baden & Barber, 2005) The situation with a repressed domestic fashion industry and the hardships of being a designer in modern Kenya is discussed by Hume in the magazine Time – Style & Design. Hume (2009) discusses that it has arisen many local fashion companies in Kenya, and that it is of importance to think in long-terms since a prospective industry can change many lives. The report finalizes with a fashion spread, as a tribute to the neglected African aesthetics.
1.2 Problem discussion

The background about Kenya and the textile industry given in the previous text leads to the main subject to be discussed in this report. As mentioned, the second hand trade in Kenya has extinguished a local fashion industry, which may have had an impact on the economic development in the country. The connection between the second hand trade and the local fashion industry is described in the report “Some pros and cons of doing business in Kenya” where the author De Coster (2008) states that Kenya has great prospective for developing as an essential textile and apparel power in East Africa. Though, to be able to start up a local fashion industry, the prominent individuals in fashion in Kenya must create a domestic demand for Kenyan fashion. When it comes to design, what inspires Kenyan designers and what role does traditional African aesthetics play? Further, is fashion seen as a way to find the once lost culture? Or seen as a way to help create a bridge between the corrupt and violent past of the country and a new Kenyan tomorrow? In this context, the historical dimension is not to be disregarded. According to Rabine (2002), the British colonial administration together with missionary activities has left a cultural vacuum that is now being filled with a strong western influence, fluctuating economy and a quest for a national identity.

Particularly the young identify with western cultural influences (Rabine, 2002). Allman (2004) talks about that the changes in the society due to the colonial imperialism also had an impact on the way the Kenyans dressed. Over the years western influences in fashion have become more and more dominant and have gone from open-minded experimentation to a growing adoption of western clothing styles. Furthermore, Allman (2004) describes that this transition created a cultural struggle, as he states:

> Individual choices about dress coalesced into broader packages of identity and self-expression that came into conflict, reflecting a polarization between those who had adopted European forms of dress and traditionalists who rejected many of the changes that accompanied colonial rule (Allman, 2004, p. 67).

The quote above shows that the division between the traditional way of dress and the western fashion needs to be considered and identified when investigating the Kenyan fashion market. To create successful Kenyan fashion brands, a will to embrace the Kenyan aesthetic would have to exist among the population, otherwise the western fashion alternatives will gain popularity. In a long-term perspective, it can be suggested that Kenya would greatly benefit from an increased domestic fashion trade and decreased second hand trade. With this knowledge in mind, our project aims to research about what needs to be considered when building strong Kenyan fashion brands, which can be seen as a step to greater economical development in the country.

1.3 Research questions

The study will focus on the Kenyan fashion industry, and how to think and act when establishing fashion brands on the Kenyan local market. The focus of the study is translated into two research questions;

- What forces and influences shape the fashion industry in Kenya?
1.4 Purpose

The study aims to get a greater insight in the way the professionals within the fashion industry in Kenya think and act when it comes to fashion and aesthetics. This is interesting from a northern European point of view since the two cultures are different in both historical and aesthetical background. Having a working domestic fashion industry could on a long-term perspective bring favourable consequences for the economical growth in Kenya.

By identifying the context and the local conditions, and recognizing professionals’ point of view regarding the fashion in Kenya, we have intended to get an understanding of the factors influencing the taste and drive of fashion in the nation. Since we find a lack of concrete research in the field of how to develop strong domestic fashion in an African country, we aim to develop a foundation given to designers and the people involved in fashion in Kenya on how to build a branding strategy for creating strong desirable Kenyan fashion brands on the Kenyan market.

1.5 Delimitation of problem

As mentioned, the aim for the study is to look at the fashion industry in Kenya and what needs to be considered in order to build Kenyan fashion brands. In that sense, we have chosen to focus only on the textile and fashion environment in Kenya, with an underlying understanding of the economical side to it. The focus will be Kenya as a closed market and its existing fashion brands and fashion initiatives.

Due to the strict time constraints of the research, we have decided to only involve the people occupied with fashion in Kenya, such as designers, design students and spokespersons for fashion organizations, and therefore delimited from the target group and consumers point of view of the subject. Since the target group of the report also is the people working with fashion in Kenya, this delimitation was rational and evident.

1.6 Outline of the report

The structure of the report will have the following composition. Chapter one is the introducing chapter where the describing background and context of the subject is presented along with the applicable thesis and purpose. In the following chapter the chosen theoretical framework will be presented. Here, the theories in question will be presented one by one to give a pedagogical structure. In chapter three we introduce the methodological approaches.

Chapter four is the first section with the empirical data gathered from the field in Kenya, together with analysis. Here we present empirical data regarding the modern fashion industry and fashion environment in Kenya. In the next chapter, part two with empirical data and analysis, we will describe and analyse the contemporary dress code; the influences that dominates the way of dress in Kenya. Chapter six present the last section with the empirical data, contemporary success factors. Here we present and analyse the empirical data regarding what to consider when establishing a new domestic fashion brand in Kenya. In chapter seven the conclusions of the report will be presented. In the final chapter a discussion regarding the
thesis validity and reliability will be presented and lastly finished with suggestions on further studies on the subject how to build a branding strategy for Kenyan fashion brands.
2 Theoretical framework

Within the theoretical framework we will present the theories and literature within our field of study that will be used in the analysis. First, the choice of the different theories will be motivated, and then follows a description of each theory, which we have chose to present in the order that they will appear in the analysis.

2.1 The company’s macro environment

In this introductory theory, the authors Kotler et al. (2001) describe the structure of the market in which a company operates. This theory works as the main theoretical model since it broadly describes the general correlation of market and company and the forces in between. To get the understanding that many factors exists and needs to be considered in one market’s environment is important when analysing the chosen thesis, and therefore motivates the choice of this model as a tool in our analysis. When looking at which influences that appears to dominate a market, forces such as economical and cultural can be stated to be relevant. Kotler et al. (2001) start with stating that the forces in the environment surrounding the company and the market can both consist of opportunities and threats, depending on the character of the market. This model shows the major six forces that operates in the large macro environment and discusses how they influence the marketing plan.

![Diagram of Influential forces in the company’s macro environment](image)

Figure 2.1 Influential forces in the company’s macro environment, Kotler et al., 2001, fig 4.5, p 124

2.1.1 Demographic forces

Demography implies the study of a population according to gender, location, occupation, age, race and further. These considerations can form significant forces to a market since people in fact are the market. The size of a population is a prominent way of measuring a market. If a population is growing, then so is the need to satisfy, according to Kotler et al (2001). If, at the same time, the purchasing power also grows, then you have increasing market opportunities. The age structure of a population is also one important factor to consider, since different age groups tend to have different needs and wants. For example, teens and pre-teens tend to be high spenders, while elder people tend to more carefully consider each purchase. To
distinguish different age-specific segments and from there develop products that supplies each generation is one way to go.

The family situation is changing around the world. In general, people are marrying later and having fewer children. The women are in greater extent working which opens for new business opportunities for business-orientated woman clothing. It has also been seen that women tend to purchase more for simply pleasure. Kotler et al. (2001) state that marketers should to a greater extent consider the needs of the population living in the increasing modern households rather than the traditional ones. Lastly, the rising number of educated people will also increase the demand for quality products. In this context, it is of importance that marketers look for demographic trends, in order to benefit from arising product and market opportunities.

Van Weele (2005) discusses the changes in consumer patterns. In the past consumers would appreciate the basic combination of price and quality, but today a demand for individuality and taste is increasing. They demand unique products that are designed for their particular need, this moves towards a reality with empowered consumers. Companies are forced to deliver innovative solutions and renew their products, and for this reason companies must acknowledge and update the customers demand.

2.1.2 Economic forces

The economic forces consist of factors that influences people’s purchasing power and spending patterns. This is something that can vary much from country to country. In general, consumers experiencing strict budget tend to spend more carefully and taking great consideration to quality and long product lifetime. Here, to find just the right combination between product quality and affordability is the key to success. The income distribution is also important to consider, since different income groups, which have different spending patterns, can dominate the purchasing market. People with most money are also most possible to fit in the population with the highest purchasing power, and demanding luxury products. People with middle- income are generally more thoughtful before spending, and can from time to time afford some more expensive goods. And lastly, people with the least money are most likely to only and always request the most basic products. (Kotler et al., 2001)

2.1.3 Natural forces

This part of the macro environment has had a growing global importance over the last decade, since the global pollution has reached a dangerous level and become an international concern. Four trends can be recognized in the natural environment; the shortages of raw materials as to air pollution and water supply, the increased cost of energy, the increased pollution and lastly the governmental intervention in this natural resource management. These trends sets limitations on how to make business while taking responsibility, but also open for new market opportunities, such as environmental-friendly products. (Kotler et al., 2001)

2.1.4 Technological forces

As Kotler et al. (2001) state; the technological environment is maybe the most remarkable force since it really shapes the market and its possibilities. It is important to keep pace with the technological change since products otherwise soon can get outdated. This is getting harder for companies as the technology life cycles are becoming shorter. But in order not to
miss product and market opportunities, the businesses must track technological changes and either reject or adapt to them. One factor that influences the possibility to keep track with technological advance is the level of investment in research and development. If a market or company lacks great financial means, starting with making minor product improvements or product changes is one way to go.

### 2.1.5 Political forces

The political environment highly influences individuals and therefore the marketing decisions in a society. Regulations and laws exist in almost all markets and control all market activities. These regulations can be operated at different levels with local or national spreading and they also change over time. It is therefore important to know the different regulations and laws that affect the business that you are in and how to use them properly. The level of governmental involvement and support in the market also influences the industries. A great support from the government can to a great extent lift and enlighten an industry. In addition to the written regulations, social codes also affect the business and how to act in certain business situations, which is something the marketers should be very aware of. (Kotler et al., 2001)

### 2.1.6 Cultural forces

The cultural forces are essential when looking at a new market and how its individuals think, value and act. The cultural environment consists of institutions and social values, perceptions, behaviours and preferences. The environment where people live shape their basic beliefs and perceptions. Beliefs can be divided into two groups; core beliefs and secondary beliefs. The core beliefs are passed on from parents to children and are fortified by school, religion and society. In addition to the core beliefs, the secondary beliefs are more changeable and can be influenced by marketers. The marketers want to forecast the changes in how people believe and value in order to gain new business opportunities. If the marketer knows what people want and desire, the appropriate product and communication plan can be developed. (Kotler et al., 2001)

The existing cultural values can be derived from how people view themselves, how they view others, how they view society and finally, how they view organisations. A variation can be seen in what people seek in life. Some desire fun and pleasure, while others for example strive for self-realisation through religion. In recent years, personal ambition through collecting goods and spending money has increased. People use products and brands as a mean to express themselves, in a more individual based world. Parallel with the materialism, a more thoughtful spending culture has arisen, with an interest in saving and helping others. How the people view the society that they live in also influences their attitudes towards the marketplace and consumption. Many developing countries strive to imitate the life and consumption of the west, and here the expensive western brands often work as labels for achievement. The locally make goods are in addition often viewed as less desirable. This behaviour, to reject the local in favour of the western, is a cultural manner that is especially common in developing countries, where the western represents success. (Kotler et al., 2001)

### 2.2 The brand identity planning model

In the context of developing a successful marketing plan, it is important to understand the dimensions of the brand. The brand identity planning model by Aaker (2002) describes the depth of the brand, as it portrays four sides of it; brand as a product, as an organisation, as a
person, and as a symbol. These four dimensions form the core of the brand and in order to shape a strong and clear brand, have to have a mutual harmony. The goal of the model is to show the different brand elements that exist and to ensure the creation of a more detailed brand identity. It is important to know the dimensions of a brand in order to chart its worth and place in the consumers mind. When analysing the influences and senses in a fashion market it is essential to understand the different meanings a brand can take in peoples mind. The gathered core of the brand then forms the actual value proposition to the customer, which can consist of various effects in the consumers mind. Finally, the proposition creates the relationship between the consumer and the brand.

![Brand Identity Planning Model](image_url)

**Figure 2.2 Brand Identity Planning Model, adapted from Aaker, 2002, fig 3-3, p 79 (original model in appendix)**

### 2.2.1 Brand as Product

Aaker (2002) describes the product-related associations as the most evident and important since they are directly linked with choosing the brand and the experience of using it. People associate products with different feelings and values; for example, dominant brands are often associated to acknowledgement and expense. Product attributes are attributes directly connected to the purchase or use of a product and can both be functional and emotional to the customer, for example through adding something extra to the product that separates the brand from the competitors, such as better service or nicer staff.

Levy (1999) also discusses consumer’s perception of the usage of the products. He says that most consumers want products to be effective in its purpose, and that the well-known brands most likely would perform the best.

The perceived quality is another important consideration regarding the brand as a product. Quality can be used as a base element in the product, or be used as competitive advantage, as Aaker (2002) states. The value concept goes hand-in-hand with quality. High quality at a reasonable price is considered to be good value for your money. Kotler et al. (2001) also discuss the brand as a product subject, related to the quality issue. He refers to the product as
complex and consisting of compound bundles of benefits that the customer demands. Quality is very important since it greatly affect consumers’ reactions to the product. Today, many marketers define quality as when they have accomplished total customer satisfaction and perceived value. Quality has become a competitive necessity for companies, only companies with high-perceived quality and value will survive. (Kotler et al. 2001)

Aaker (2002) continues, the product can also be associated with the time of use and the people who use it. The use occasion indicate that the product is related with some moments, and other products with other occasions. Another option is to link the product with the users that represent different lifestyles and needs. As Aaker (2002) continues, this strong user-type position can create a strong brand personality.

According to the model, the last option in the first dimension is to link the product to a country or region. The brand manager chooses a country or region that will add some authority and trustworthiness to the brand. In order for this to work, the region has to have a reputation of doing the best in its product class; otherwise the association with the region will not fulfill its purpose. Though, the country of origin has to be carefully examined to avoid choosing a country that is more known for doing something else, in that case the product can lose its trustworthiness. (Aaker, 2002)

Anholt (2005) also discusses the dilemma to choose whether or not to embrace the country of origin. If it is a developing country, this could imply negative associations. Anholt (2005) describes further how Dilip Kapur, the president of Hidesign, an Indian fashion accessories brand, says in an interview in Economic Times, that he would never want to categorize his brand as Indian. Anholt (2005) states that if the target market for your brand is the modern elite or its equivalent, stateless is important for them. Brands coming from Germany, Japan, or America adds credibility and appeal to the product, whereas coming from a poorer country such as Kenya is more likely to diminish the appeal. The reality shows another thing as well: most of the times, many expensive, well-seen brands have their production in developing countries, which should make the low-quality reputation for the poor country less earned.

2.2.2 Brand as Organization

This dimension focuses on general attributes more than the ones linked to the product. Innovation, concern for the environment, drive for quality, organizational values… etc. These meanings could both belong to the product-related dimension and to the organizational-related one, depending on if the values are based on the organization or the actual product. The organizational attributes are more stable and rooted within the company, and can much contribute to the value proposition since they often involve emotional and self-expressive benefits. (Aaker, 2002)

2.2.3 Brand as Person

If a brand has a strong and rich identity, it can involve more than just values and product attributes, and instead evolve a personality. Aaker (2002) speaks about a richer brand identity, that also can be more interesting and appealing to the customer, since it not only involves product attributes. The brand can generate many different associations, as it can be fun, active, formal and youthful, just like a human personality, Aaker (2002) describes. Creating these associations can be a challenge for the marketer, since the relationship between the consumer and the brand is complex, as Kotler et al. (2001) discuss. The task is to create a
feeling of deep meaning within the brand and its communication. If the brand succeeds and creates a brand personality, the brand will catch the attention of consumers who identifies their desired self-ideal with the brands image, he finishes.

As Aaker (2002) continues, a brand that has a personality has got many advantages. It has got a higher chance to remain strong for a longer time and it can easier create a relationship with the customers since a personal self-expressive dimension is added. Just as personalities can affect the bond between people, so can the personalities of the brand and the consumer affect the relationship between them. A brand that is characterized as professional and helpful will consumers view as a helping hand in professional situations. Having a brand personality can also be used as a tool in the communication strategy. The brand can easily communicate information regarding product attributes and value-adding services, which creates a functional benefit to the value proposition.

2.2.4 Brand as Symbol

Having a strong symbol representing the brand can create essential recognition and structure to the brand identity. The symbol can be a strong strategic tool, just as not having it can be a great disadvantage, as Aaker (2002) states. Antonides & van Raaij (1998) discuss the importance of symbolic characteristics of brands. Earlier, the primal function of products was simply the use, but nowadays it has become more important to link products to other psychosocial dimensions. When studying consumer behavior in certain cultures, it is vital to be aware of the symbolic consumption, they discuss. Since products are an observable form of culture, symbolic consumption can also be based on modern symbols as popular brands and different types of products.

As Aaker (2002) states, the symbol can be anything that represents the trademark, but it can generally be divided into three groups; visual imagery, metaphors and brand heritage. Visual imagery can be a visual picture or symbol that appears repeatedly in connection with the brand. This is very effective since the visuals can easily and fast remind of the brand. Adding a metaphor to the symbol will increase the feeling of meaning and can clarify the functional, self-expressive or emotional benefit. Also, the brand and product can work as statements of the tradition versus the modern. As Aaker (2002) says, a meaningful and colorful heritage can very well be used as brand symbols, with purpose to remind of something traditional and give positive nostalgic associations.

Clothing is one type of product that can have strong symbolic meanings, according to Antonides & van Raaij (1998). Clothes often strongly appeal to people’s ego, in addition to food or more functional products, which appeals to people’s basic needs. Antonides & van Raaij (1998) mention different kinds of symbolic products. Prestige goods are products that have become symbols of prestige, and serve the function of boost the consumer’s ego. Status goods are products that belong to a well-known brand that have positioned them as better than competitors in any meaning and therefore provide status. The status goods are often associated with group membership and the prestige goods with leadership, as Antonides & van Raaij (1998) finish.

2.2.5 Brand identity as value proposition

As have been showed, the brand identity can be divided into different dimensions that all affect how consumers view brands. When the consumer then is offered the product, he or she
will view the product as a value proposition. The value proposition is a collection of the benefits that the product offers, which can be divided into functional, emotional or self-expressive ones. If the value proposition gets appreciated, the relationship between the brand and the customer would probably lead to a purchase. After the purchase, the actual experiences are a vital part of the perceived value, as Antonides & van Raaij (1998) discuss. As a part of the so-called disconfirmation theory: if the experiences fall short of expectations, the consumer will be disappointed and develop a negative view and relationship to the brand. Antonides & van Raaij (1998) continue by stating that expectations are always influenced by comparisons and therefore by other brands. A product is always valued by looking at other competitors or standards, which can be product groups or products coming from a specific origin, they finish.

The relationship between the customer and the brand is depending on how the customer perceives the brand and its value proposition, as Aaker states (2002). The functional benefits of a product is based on that the product attributes gives functional utility to the customer, thus, these benefits have limitations since they can be hard to differentiate and easy to copy. The emotional benefits, on the other hand, give the customer a feeling rather a practical utility. These sorts of benefits are often used in commercials and advertising, where they often sell promises of different types of emotional states. The last benefit is probably the most powerful one; the self-expressive benefit. Everybody has a need of self-expression and to communicate their self-concepts they use brands and products. In this way, the brands work as means to define and classify people.

Aaker (2002) continues; the self-expressive benefit of a brand creates a discussion about the division between the real self-concept – how people actually see themselves, and the ideal self-concept – how people would like to be seen. To raise and, as much as possible, realize their ideal self-concept, people tend to buy things that supports the ideal concept.

### 2.3 Key determinants of perceived brand quality

The selection of the model “Key determinants of perceived brand quality” (adapted from Kotler et al., 2001, p 551, original model in appendix) is based upon the purpose of defining a number of characteristic success factors when starting a new domestic fashion brand in Kenya. The purpose is to define these success factors as a foundation for a brand management plan for new domestic brands. This model is based upon a study that emphasises several key determinants of perceived service quality. It is crucial for a company to understand what the buyer’s needs and expectations of the brand are in order to define success factors. Therefore, when analysing a market and the prominent success factors for a new fashion brand, certain demands should be determined. This model can help a new brand distinguish the different areas within the company that needs to be emphasised.

Anholt (2005) argues that developing countries needs to corporate brand development better and earlier in their companies brand strategies. He also states that branding creates expectations of product quality that the company must work a considerable amount of time with, and push the development towards a western-style approach, both regarding innovation and quality control. As long as the product sustains the brand promise, there is no reason why the companies in developing countries should not begin early with their brand development. Having a powerful brand makes the company stronger and more likely to be perceived as more important by investors, suppliers and competitors. The brand is what the companies in developing countries can compete with, since they can take advantage of different intangible
values such as an unfamiliar story, an unexpected country of origin or a different brand culture. Primary competing on lowest price is not the best strategy to go for companies in developing countries, as this decreases the reputation of both the country of origin and the company. Anholt (2005) continues explaining that one problem poor countries have is the limited knowledge regarding brand management and on how developing brands.

According to figure 2.3, there are several dimensions of quality such as access, credibility, knowledge, reliability, competence, responsiveness, awareness, likeability and adaptability. These affect the perceived brand quality, which is based upon the expected quality of the buyer. This model is adapted from “Key determinants of perceived service quality” by Kotler et al. (2001, p 551) where some the dimensions awareness, likability and adaptability have been added from Lane Keller (2008).

According to Kotler et al. (2001) the key is to exceed customer’s expectations, this can be done by not give out promises that the company is unable to keep. The customer’s expectations are based upon word of mouth, advertisement and past experiences. In order to measure them the brand must compare the expectations with the perceived quality.

Gummesson (2005) propose the difficulties regarding accessing the customer’s experiences with the brand, since the feelings are largely a black box to companies. Complaint management is a new discipline that has developed for companies in order to recover from poorly delivered quality, since these negative past experiences, have the risk for a negative word of mouth. The dissatisfied customers can also become part-time marketers. These are people both inside and outside the company that discusses the brand with other people, and can be used for and against the brand. Part time marketers need to be considered, especially to discover the dissatisfied customers in order to prevent negative word of mouth.
2.3.1 The dimensions

When analysing a market this model can help the company to conclude the different brand criteria that needs to be considered. According to Kotler et al. (2001), the company needs to identify key determinants, in order to improve the quality of the brand. When looking at a specific market, different dimensions are of importance, and we found these elements to be crucial when it comes to domestic fashion brands in Kenya. The model also emphasises the importance of exceeding customers’ expectations. To understand the customer, analysing the expectations and the actual experience of the customer is of importance.

Kotler et al. (2001) highlight access as one dimension, which indicates whether the product is easy to access or not. This dimension concerns both location and price access. If a customer has a long distance or difficulty to access the location of the brand, the perceived brand quality is negatively affected. Pricing is also of major importance, since it gives the customer the economical access to the company’s products. If the pricing is wrong, the perception of the brand may be affected wrongly. Aaker (2002) discusses the role of the price, since it is related to the benefits of the brand. Pricing is a complex construction, because the price can on one hand signal higher quality, but on the other hand reduce value proposition. The brand must decide if brand or benefits should drive the pricing. In order to maximise easy access to the new brand, pricing and location is crucial.

Credibility is the second factor Kotler et al. (2001) discuss, which shows if the consumers consider the brand trustworthy. In order to receive credibility, the brand must establish and deliver the expected quality of the brand. A bad past experience and negative word of mouth affect the apprehended credibility. Knowledge states if the brand really understands the buyer’s needs and wants. If this knowledge is absent, the accurate dimensions of quality are not included in the brand management plan. Reliability concerns if the brand is consistent regarding quality. If the quality is inconsistent, both reliability and credibility is affected and the perceived quality will be negative. Competence distinguishes the importance of personnel skills and the requirements to deliver what the customers want. If the competence of the staff is low, the perceived quality level will be affected negatively. Competence is emphasized by Anholt (2005) as one of the most important factors, when it comes to developing countries since they lack of adequate quality control. He continues arguing that this is the first dimension to consider, when starting a branding strategy, since the branding itself utter for a higher price to the product, and therefore indicate higher quality. Continuing, responsiveness shows if the company can respond quickly to the customer’s need, as Kotler et al. (2001) say. This is crucial when it comes to fashion, where the market demands a quick respond on trends and colours. Communication considers how well the brand communicates with the customer.

According to Lane Keller (2008) there are different brand elements that can be stressed. These brand elements serves to identify the brand. Memorability, or as we chose to call the dimension; awareness, is stating the importance of the customer’s awareness. It should be a goal that the brand is easily recognised and recalled. But awareness is not much worth, if the customer does not like the product. Therefore, likability is another brand element. The brand must be interesting and aesthetically pleasing. Adaptability shows if the brand is flexible and possible to update. Changes in consumer behaviour for likes and dislikes over time demands an adaptable brand, which is closely related to responsiveness. An adaptable brand can respond quickly to the market demand.
The nine dimensions can be concluded as an analysing tool to achieve positive perceived brand quality. We have chosen to delete and add the dimensions that are relevant for this specific study. These dimensions can be exchanged or emphasised differently, depending on which market is under analysis. The two previous theories described by Kotler et al. (2001) and Aaker (2002) are a great compliment to this model, as they are applicable in the broader sense.
3 Methodological discussion

In this chapter we will describe the framework of our study, present the procedures and the choices of method, which has its background in our problem formulation. The chapter will end with a short summary for the thesis’ selected approaches.

3.1 Scientific main approach

In the literature two main paradigm within scientific methodology are presented: positivism and hermeneutics. They represent two approaches of looking at a phenomenon (Thurén, 1997). Both approaches can be used depending on the purpose of the research.

This thesis has a hermeneutic approach. By doing our field study in Kenya, we tried to understand a meaning and by this gain greater knowledge. In this field study it would be impossible to disregard our prejudice. Our role as researchers has been open, subjective and engaged. The hermeneutic approach goes in line with our research purpose, which is to analyse, interpret, understand and conclude our empirical data.

3.2 Method of theoretical research

According to Andersen (1998) there are different methods to research, to take on a research question: deduction, abduction and induction. They describe the relationship between theory and empirical data. Because of the nature of our thesis, we had an abductive approach where we first collected the empirical data and then applied it with general theory. The collected empirical data from our field study is the substructure in our research paper and from that we have decided appropriate general theory.

3.3 Research purpose

Depending on how much information the researcher has about the subject, there are different types of research; descriptive, explorative and explaining research (Andersen, 1998). As researchers we had little pre-knowledge about the phenomenon we were about to investigate and therefore the thesis had an explorative approach. We have explored the attitudes and opinions among the respondents and then described and applied existing marketing theories on the specific field study. The reason we had an explorative approach was because we wanted to investigate how professionals and designers think and act within the Kenyan fashion industry and to present a basis for a brand management plan for them to use. The existing information regarding this subject was very limited and difficult to access.

3.4 Research method

We have performed a field study in Kenya. Field studies give a richer understanding to the research subject and is characterised by a long-term excursion (Andersen, 1998). The reason we chose Kenya was because we were selected to participate in a project that required the excursion to the selected country. We have collected the empirical data mainly by doing in-depth interviews with people involved with fashion at the Kenyan market, however we have also included the observations made during our field study.
This thesis has mainly a qualitative method, because the purpose was to investigate involved key peoples’ opinions and experiences, in order to gain a richer understanding. Qualitative data, consisting of primary data such as in-depth interviews, dominate the empirical data and this information could not be quantified in statistics.

We have also considered secondary data such as literature, theories and articles that concerned our research study. The literature used in this thesis has given us the appropriate knowledge regarding marketing theories. Recognised marketing writers, such as Philip Kotler and David Aaker, dominate the literature, but articles and Internet has also been included.

3.5 Data collection

There are many different techniques in order to collect data. May (2001) describes different ways in which an interview can be performed: structured, unstructured and semi-structured interviews. Our empirical data is dominated by semi-structured face-to-face interviews. The in-depth interviews have all been performed in Kenya and were video recorded, to enable us to analyse the material as accurate as possible. The interviews were conducted with key people involved within design and fashion at the Kenyan market, such as four fashion designers, one fashion editor, one fashion stylist, one marketing manager and one project manager. One of the semi-structured interviews was performed with a group of seven design students. This interview was not performed individually since all respondents were eager to participate and because of our time limit.

The reason to perform face-to-face semi-structured interviews is because we wanted the respondents to have the opportunity to lead us into new paths within our research, in order for us to broader our knowledge, but still have the answers to our questions. The focus group interview was performed because we wanted several design students perspective, but also because of limited amount of time.

Observations can be closed or open, structured or non-structured, participating or non-participating and direct or indirect (Andersen, 1998). We have performed participating, indirect observations. These different observations are not in focus, but we do not want to exclude them from our thesis, since they may have affected the discussion and analysis of the in-depth interviews. We consider these observations as a complement to the interviews, to see if the answers given by the respondents were correct or not.

We were able to participate in a big fashion event, FaFa Fashion for Peace gala, we participated in different meetings such as a visit to the Textile Training Institute and The Cotton development authority, Tears Group fashion design school in Nakuru, Human Habitat at the UN in Nairobi and other observations made during the field study in the different parts of the country.

During our observations we have taken part in more spontaneous interviews and discussions, which are also included in the research. We have met the fashion designer and owner of the fashion brand Pilotsea, the two designers at the fashion brand Obad wear and teachers at The School of Art and Design at the University of Nairobi.
3.6 Respondent selection method

Because of our limited amount of time, we chose to handpick our respondents, in order to guarantee we received the relevant answers to our questions. We found the respondents by searching on the Internet for different relevant people involved in the fashion industry. We had contact over e-mail with several respondents before the field study, but most of the respondents were to be found during the field study. As soon as we had our first interview in Kenya, we were forwarded to other relevant people and were able to contact them via phone for an interview.

There is a risk that some groups of relevant people are not represented, though this thesis focuses on the active people within the fashion industry. Due to our time limit, we were unable to interview all relevant groups involved in the fashion industry in Kenya.
4 The fashion industry

In this chapter we present our first theme regarding the fashion industry in Kenya. First, we introduce our empirical findings, which we then will analyze by using the introducing theoretical model, figure 2.1, by Kotler et al., (2001). Our empirical findings presented in this chapter have contributed significantly to our part of the report *Dignity IV- Kenyan Fashion Identity* (Edwinsson et al., 2009).

4.1 The Kenya fashion consumer

As being a developing country, Kenya has over the years, as mentioned, received vast amounts of clothes through charity. The respondents agree on that the second hand industry has had an impact on Kenya’s fashion industry. The fashion stylist, a well-known designer and fashion stylist in Kenya, talks about how the second hand trade has created an interest for fashion and also has set a norm for how to shop in Kenya. She continues that the Kenyans buy what is available, and so far, second hand has been available and easy to find. Strolling the streets in Kenya, observations reveal that second hand shops can be found everywhere, from high-end selected second hand on expensive addresses in the capital of Nairobi to cheap clothes on a blanket in the slums.

The availability of the second hand items have made the Kenyan people more stylish, claims the fashion stylist. The industry has brought fashion products from Europe and America into the market, but most people do not know how to put it together. Instead they use western clothes as they are used to use the African ones; with wild colorful mixes and bold mixed patterns. The fashion stylist also tells us that the high availability of second hand clothes has made the Kenyans used to these types of clothes, clothes that mostly originate from the west through charity projects. This has created a widely spread acceptance for western clothes with overwhelming western influences.

When meeting the project manager in Maasai Mara the impact that the second hand industry has had on the Kenyan fashion market gets further discussed. The project manager originates from Sweden but has lived and worked in Kenya the past four years. She is employed by Basecamp explorer foundation in Maasai Mara to lead the project The Maasai Brand, a community project for the Maasai women where they make and sell jewelry and leather products based on traditional design. She talks about how the industry has brought in the western clothing, which has been a great change to the Kenyan market since it has made the people starting separating from African inspired clothes. The market is huge and it is where all people buy their clothes, she concludes.

Apart from demanding an easy buying access to fashion, it has also emerged during the interviews that the Kenyan consumer is very pricing conscious. The cause is again the second hand industry with its low prices.

Though the fashion interest is high in Kenya, the trend awareness has been described as a bit low and late comparing to the rest of the world. The project manager talks about how the second hand industry has resulted in how the Kenyans gets old trends, maybe ten years after they appears, though she still states that they exist in Kenya. The fashion stylist responds to this thought, but with stating that the Kenyans are slow on adapting new trends;
Kenyans are still not very big shoppers, so they do not extensively follow fashion trends. In this way it takes time for them adopting to trends. (The fashion stylist 2009-04-03)

4.1.1 Analysis

The great influence that the second hand trade has had on the Kenyan fashion sense and fashion market can be correlated to the economic forces within the macro environment (Kotler et al, 2001, see figure 2.1 p 5). The availability of the second hand clothes has created a strict price range that the Kenyans are used to. As Kotler et al. (2001) say, when experiencing a strict price range, people tend to spend more carefully. Related to that many Kenyans have restricted budgets, it can be seen that they also to a great extent buy clothes that are classical and therefore lasts longer in a fashion sense.

The high acceptance for western clothes, caused by the great range in the second hand markets, would Kotler et al. (2001) describe as an effect of cultural forces. The environment in which people live shape their perceptions of consumption and aesthetics. In this way, The cultural spreading of the western aesthetics and brands in Kenya caused by the second hand markets have made the people to accept and embrace the foreign culture.

4.2 Working in the industry

As have emerged from the interviews, the Kenyans are interested in fashion and styling, but working with fashion in Kenya has come to light to be tough and reluctant. Teachers at the School of Arts and design at the University of Nairobi tell us that Kenya has had a strong textile industry, but it has decreased and is now almost non-existing. The second hand trade has caused the demand for domestic products to decrease and later to be extinguished. The farmers growing cotton have since a long time started to grow other crops and many production sites stands empty and useless, with some exceptions. The teachers continue by saying that this has caused the talented fashion professionals that once worked in Kenya to leave Kenya and make career abroad.

The fashion stylist also speaks about this dilemma. Today, the design profession in Kenya suffers low status in the society. She says that people do not understand the amount of work that is put into fashion, and the design profession is therefore not appreciated that much. The real worth of a garment and the fact that it is someone’s profession is not seen, and that creates a situation where design gets low status. The fashion stylist tells that there is a big difference between the traditional Kenyan families and the modern regarding the view of the fashion profession. In the traditional Kenyan families, this is not an accepted choice of career, only a profession such as medicine or law is. But she continues by saying that this is changing, since the number of more modern-living Kenyan families are growing, and here design is seen in a more positive way.

Visiting the School of Arts and Design at the University of Nairobi gave light to the existing situation of this dilemma. Many of the design students participating in the group interview revealed that fashion was not a promising branch of the design profession, becoming an industrial designer was a safer way to go if you wanted a good salary and higher ranking in the society. The aspiring fashion designer Joseph Kisuli works in Kenya and talks about his experiences regarding the view of his profession in the article “Why few Kenyan men shine in fashion design”, written by Lati (2008). He claims that especially men who are designers gets
questioned and discouraged since the profession it is not seen as a proper way to make a living.

When meeting designer A, the unpopularity of fashion design gets further discussed. Designer A is a jewelry designer based in Nairobi that has been active in the design industry in Kenya for 19 years. She tells that many designers end up doing something else, like graphics. The low demand for fashion jobs, in combination with difficulties to get financial means, has led to a tough working position for designers in Kenya, she discusses.

The low interest to work with fashion in Kenya has made the knowledge about making fashion to decrease and almost gone missing. Many of the respondents discusses that insufficient quality is a big problem for designers, which contributes to a tough business environment. Designer A discusses the quality issue, as she states;

The tailors here are not as good as the ones in South Africa. Here, in Kenya we do not have the tradition of tailoring. (Designer A, 2009-04-04)

In the magazine Time Style and Design, the author Hume (2009) discusses the quality problem in the Kenyan tailoring. The designer Max Osterweis recently started his brand Suno in Kenya but soon got shocked by the poor quality. To be able to produce in Kenya, he imported skilled people to start up training of the locals.

The difficulty with working with fashion in Kenya has also appeared to have political and economical grounds. Designer A states that the government in Kenya is not willing to invest in the fashion industry, which has to be done in order to create possibilities for its development. There is a big interest for a growing fashion industry, but no one bothers to take the lead, she claims. She continues by saying if someone would take the lead and responsibility for that kind of a project, maybe the industry would have a brighter future. The opinion that the government has a responsibility in developing the industry confirms when meeting the design students at the University of Nairobi. They claim that the government has to market the profession in order to make it more attractive and accepted.

Designer B has lots of opinions about the economical hardship of being a designer in Kenya. Designer B owns the small fashion brand Madame Baboonski in Kenya and claims the business environment in Kenya to be tough. Designer B has had many problems finding good tailors that are reliable in terms of money and time. If you do not watch the tailor, it is very likely he will not do his work properly, she claims. It is difficult to find tailors with knowledge of high quality at a reasonable price. She concludes;

Kenya is not an easy place to do business in. Everything costs and you do not get much for it. (Designer B 2009-04-03)

Finding loyal customers that are willing to buy the more expensive garments is a challenge and she feels the strong competition from the trendy and well-made South African fashion brands. She also experience strong competition from the second hand markets, by dejected claiming that there is no market for high fashion in Kenya. As Lati (2008) writes; fashion designers in Kenya today are struggling to capture the interest of a small sector of consumers that wants exclusive wear and has the ability to pay for the goods.
One other disadvantage of working with design in Kenya that designer B experiences is the lack of financial means. This is also confirmed by designer A who tells us that no bank will lend money to designers in Kenya. As Hume (2009) also states, if anyone would consider getting a loan, the interest rates are extremely high so it would nevertheless not be worth it. The designer of the Kenyan brand Pilotesa agrees upon this dilemma. She wants her brand to be available and affordable but suffers problem with receiving profit. Either she needs to raise her prices or find a way to sell more, she discusses. She dreams about getting an investor into her business, but it is hard since no one want to invest in fashion in Kenya.

That Kenya is a country of great ethnical diversity has already been stated. According to designer D, a Danish/Greek fashion designer living and working in Kenya, white people have a better chance to become successful in Kenya. Designer D designs contemporary fashion garments made from recycled parachutes, and have in only one year developed a company that is profitable. She claims that racism exists in Kenya, but that no one talks about it. White people are to greater extent more likely to be taken seriously and respected in these kinds of contexts, she means. She continues by saying that Kenyans that never have been overseas have narrow perspectives, which can worsen their possibilities to make business. The Kenyans that study abroad has better chances as they broader their perspectives, she finalizes.

4.2.1 Analysis

The low status that the design profession in Kenya suffers can be directly connected to the political forces that Kotler et al. (2001) describe in figure 2.1. The level of governmental involvement influences on how the industry is valued. In Kenya, the governmental involvement in the fashion industry is low; which has caused the industry to be tough to work in because of the lack of customer demand and professional knowledge. As a result, the design professions have socially low rankings. According to Kotler et al. (2001), this would be described as a part of a social code, which marketers should take into consideration when entering a market.

The difficulty to loan money in Kenya is also a consequence from the political system. With political adjustments, increased possibilities to loan financial means could mean a different outlook of the industry. The low governmental involvement and low investment in the fashion production capability in Kenya can also be linked to the technological forces in Kotler et al.´s (2001) theory. Kotler et al. (2001) describe the importance of investment in order to keep track with the technological development, which clearly has gone missing in Kenya. As stated, if the Kenyan government were to commit in the revival of the fashion industry, new market possibilities would be created.

The demographic forces that Kotler et al. (2001) describe can be related to the developing perceived opinions about the fashion profession. The living style of the population in Kenya is changing, as have been discussed earlier. Many families are going from traditional living to more modern, which affects their way of seeing the design profession. This is according to Kotler et al. (2001) an important factor in the existing market to be aware of. Also, related to the demographic dimension of the market, the growing group of young people with education in Kenya can have a significant influence on the types of products demanded. The increased number of people that studies abroad will make the demand for quality products to increase, since educated people have the tendency to demand more quality products, as Kotler et al. (2001) state.
Lastly, cultural forces are very present in the Kenyans view of the fashion industry. Kotler et al. (2001) state that in developing countries like Kenya the western is often seen as a label for achievement, which can be related to designer D opinion that white people more easily can make successful business in Kenya. Following this thought, the white people would tentatively represent success and respect, which would explain the somehow easier dealing they experience in business contexts.

4.3 Development and possibilities

Regarding the potential fashion industry in Kenya, the respondents had positive and interesting opinions. Many of the respondents agreed that the Kenyan fashion industry has a lot of potential and prospective. As designer A explains, it is a very vibrant industry right now where a lot is going on. There has been an initiative started by the government in Kenya called “Brand Kenya”, which aims to market Kenya abroad with the hope to attracting investors and businessmen. Designer A continues by stating that Kenya has a lot of traditional creativity, because of all the different tribes and their different cultural expressions. Kenya has got the tradition of making crafts, which can be passed on to a more modern industry. She finishes by saying that this craft tradition sets conditions for developing a successful industry. The project manager also talks about the cultural tradition in Kenya and its effects on the fashion industry. She shares designer A’s view of the widely spread traditional creativity in the country, as she says it exists everywhere and in lots of areas in Kenya. Regarding a prospective fashion industry in Kenya she answers: “The fashion in Kenya is not massive yet - but it is coming, it is growing, it is bubbling” (The project manager 2009-04-11).

During the interviews interesting and essential information regarding the purchasing power and population arises. The conditions for a commercial market are changing in Kenya, which to a great extent affects the possibility to succeed with a domestic brand. The project manager reveals that the middle class is extensively growing in Kenya and therefore the purchasing power for fashion. She discusses that it is difficult in a country where there is a big difference between the poor and the rich, and in this society, not everyone can be interested in fashion and be a prospective group of consumers. Though, she says that there is a growing group in Nairobi that is becoming a middle class who can afford these types of products. These people do buy branded clothing since they are very aware and concerned about fashion.

The project manager continues saying that the interest for domestic fashion is growing, as the middle class and people with money are growing. This new generation with money can afford more expensive garments and have a greater interest for domestic products with a higher fashion level. There is lot if things going on already, but the prospective consumers just have to know where to look for it, she says.

Designer A agrees with this thought, as she says that people are becoming more receptive and approachable in general, and the environment and interest for fashion is changing. The marketing manager at the fashion brand Kikoromeo and project manager for FaFa Festival for African Fashion and Arts, responds to this. The marketing manager tells us that there is a lot of different sorts of events nowadays in Kenya and to these events the Kenyans want to wear traditional Kenyan outfits in order to look representative, which also suggests for a growing interest and market for domestic fashion.
4.3.1 Analysis

The empirical data regarding the potential fashion industry in Kenya can easily be linked to Kotler et al.’s (2001) forces in the market in the figure 2.1. Kenya has a tradition of cultural creativity, which constitutes a cultural force that shapes the view the population sees the modern fashion industry. Depending on lifestyle and tribe, people would have varying perceptions of the traditional and modern. Some Kenyans would easily adapt to the modern life with fashion trends and western influences while some people would rather stay in the traditional living.

The growing middle class in Kenya is a demographic force that according to Kotler et al. (2001) will have great affect on the structure of the market. This change creates new possibilities through a greater purchasing power. This middle class appreciates wearing the traditional Kenyan fashion to events and presentations, which is a result of a cultural force. This force would dictate that specific types of garments are appropriate and acceptable, which strongly can affect people’s choices. The growing purchasing power due to the growing middle class can be related to the economic forces of the market. As Kotler et al. (2001) state, the income distribution is a factor that is important to consider when analyzing a market. For the Kenyan market, it is now indicating that there is an increasing part of the population that have more money and that then, according to Kotler et al. (2001), are most likely to be interested in more expensive goods. This could contribute to increasing chances for a more up-scale Kenyan fashion brand to succeed.

As van Weele (2005) also expresses, the changes in consumer behavior will be affected when an increasing part of the population now has more money, this future development is also something that needs to be considered when entering the Kenyan market. This would imply for the domestic brands to consider how a new demand would affect their brand. A higher income gives a demand for more expensive products, as van Weele (2005) says, which leads to an opportunity for the domestic brands to implement branding and, as a result, higher the prices.

Lastly, the “Brand Kenya” initiative reveals governmental support in Kenya as a growing market and industry. According to Kotler et al. (2001) this can be understood as a political force that to a great extent can influence an industry. If the project succeeds, one presumed effect is that the inhabitants of Kenya feel encouraged and with a strong belief of Kenya as a great country for business. This would naturally be reflected on the fashion sector, and, according to Kotler et al.’s (2001) theory, possibly enlighten the industry.
5 The contemporary dress code

Having presented the empirical findings about the basic conditions for the fashion industry in Kenya, it leads us to continue with the influences in the Kenyan way of dress and how they dress. Understanding the consumer is important when both looking at forces shaping the fashion climate in a country and also when discerning its success factors since they constitute the market that demands the products. In this section we will analyze our empirical findings by using figure 2.2 by Aaker (2002). The empirical findings presented in this chapter have too been included in our part of the report *Dignity IV- Kenyan Fashion Identity* (Edvinsson et al., 2009).

5.1 Inspiration and influences

“People want to be trendy and trendy means wearing what they wear in America or Europe” (Designer A 2009-04-04). This quotation shows how many Kenyans approaches western influences in modern Kenya. When asking whether or not the Kenyan fashion sense is inspired by western style or Kenyan style, the marketing manager declares that in the end it all comes down to the individual and the taste of that person. Though some trends can be identified, it is all about what the client wants and the matter of his or her choice. The balance between the traditional African and the westernized modern in the Kenyan fashion were much discussed during the interviews.

The project manager tells that most fashion designers in Kenya today do a fusion between the Kenyan and the western. The Maasai Brand at Basecamp Explorer does this as well and from our observations during the FaFa Fashion for peace gala, there were several other East African brands that were getting the similar influences: A fusion between the western and the traditional African, but with dominant African influences. As observed, the attending participating designers were mainly focusing on more dressed up wear for festive occasions, as might have been a reason for using these types of influences. From observations made from the streets in Kenya this fusion between the western and the Kenyan also emerged to be widely spread, as people wearing clothes with classic western cuts in traditional Kenyan fabrics was much notified.

One of the design students at the University of Nairobi confirms how the combination between western style and traditional Kenyan patterns is increasing in popularity. She describes the whole concept for Kenyan inspiration: Western fittings with African prints. But the new brands should keep in mind to make it non-tribal, since this would benefit a greater consumer population.

Kikoromeo is a successful Kenyan fashion brand that work with this fusion, and as the marketing manager tells, also what is starting to be more and more trendy and popular to do among the designers in Kenya. She tells that many local designers choose to work with local fabrics. Kikoromeo promote the “Africaness” and the unique African styles, patterns and fabrics, in a modern way. But, as the marketing manager states, the brands cannot only look at the traditions, they need to be able to adopt with trends, but at the same time maintain the African background. She thinks it is important to keep the African elements in the design, though she raises the question about what really is western and what really is Kenyan. She argues that clothes have to be constructed a certain way, therefore, one cannot say that a pair
of trousers or a top can be western. The west borrows from the African and the African borrows from the west; it is all a mixture, she concludes.

Agreeing with the marketing manager, the fashion stylist also thinks it is very important to maintain the traditional elements in Kenyan fashion since it is a heritage and identity. She discusses the western and African mix further as she describes how domestic fashion brands must embrace the cultural heritage but also update it to make it contemporary. She says that designers nowadays receive influences from the western way of dress, but mixes it with African prints, in order to make it more wearable. Designer A harmonizes with this as she states that it is a whole knowledge that would be very sad to loose, and the traditional is also what makes Kenya unique. The belief that the traditional aesthetics is a part of the Kenyan individuality is also shared by the project manager. If they would loose the heritage they would loose their identity, and this is what has happened to the west, she claims. The project manager finishes that this is a reality that the Kenyan brands have to take into consideration in order to not repeat the sad mistake.

The majority of the respondents had the opinion that traditional African and Kenyan influences are important to keep in modern Kenyan design. The reason for this is because otherwise they will loose their heritage and identity. The marketing manager describes it simply; the Kenyan traditional aesthetics are vibrant and fun, so why take away the Kenyan element? Even though most of the respondents wants to keep traditional influences in contemporary fashion design, most respondents have the belief that clothes with western origin is what sells the best among the general Kenyan consumer, but that this of course is depending on demography and economical status of the consumer.

Regarding the importance of keeping traditional influences in the Kenyan design, designer D is of a different opinion. She believes that it is not necessary to preserve the traditional when establishing the domestic fashion industry, as she says:

> In a fast pacing fashion world with high competition, it is not important to keep the Kenyans in something old. Instead, they have to be innovative and think new! (Designer D 2009-04-25).

The fashion in Kenya has not been successfully developed since it has been a lack of innovation, designer D discusses. She talks about that innovation instead of looking back to the history of traditional design has been the most important influence in her design and she also consider this to be the most important influence to other domestic fashion brands. If they are forced to think new, then they will have greater possibilities to develop and compete with the international market. Whether the brand receives influences and inspiration from the western or the Kenyan, is less important. She questions the whole idea of looking back to the history, because what is important is not whether or not to keep traditional designs, but to come up with something new and innovative. In addition to the project manager, she argues that separating from the old and traditional would gain the Kenyans. The western world has not kept its traditional aesthetics in fashion, so why should the Kenyans, she finishes.

When interviewing the design students at the University of Nairobi, they all agreed upon one thing: Kenya has a lot of cultural creativity, however they receive much inspiration from the western countries. As was confirmed by designer A as well, The United States of America is seen as an ideal world and this is also a great influence in design and inspiration to styling. The Kenyans consider what is seen in New York and Europe is what is trendy and popular in
Kenya as well. Barack Obama, the president of the USA has Kenyan roots, and, as a response, we observed great patriotic feelings within many Kenyans during the field study. They seem to be very proud of the relationship with the USA, but also proud to be Kenyan. It is impossible to disregard from all the Obama t-shirts and fabric with Obama prints that are sold everywhere. This shows how patriotic they are, but also how they receive influences from current global events. These signs of imitation are also confirmed by several of the design students.

“Kenyans like to imitate - just copy and paste from the media” (Design student University of Nairobi 2009-04-06). As this demonstrating quotation from one of the design student shows, it expresses how many Kenyans see what is on TV and how they tend to adopt and be influenced from what they get inspired by, such as celebrities, TV and other media. Since many TV shows are American or American inspired, especially the youths are inspired by the way they dress there. When travelling around the country, it is difficult to ignore the American hip-hop culture that has been established, especially among the youths. Many of the design students at the University of Nairobi discussed the admiration for western products. They are regarded to have very good worth and express some kind of social statement of the person wearing it, thus creating a strong relationship to the buyers. In contrast, the Kenyan brands are not seen as having the same value standards, and therefore, not that popular to buy, they finish.

The fashion editor for the magazine African woman, who also works as a fashion model, describes another influence; the South African brands. These are well-established brands with several big shops in Kenya. Since this is what is widely available, this is also what inspires Kenyan consumers. She continues stating that the general trend goes towards western clothing in combination with African inspired jewelry and accessories. From our observations, the fusion between Kenyan and western seems to be increasingly popular, however, from what you see in the streets, the style is still dominated by western influences.

The availability of the second hand clothes is also something the fashion stylist describes as another influence. Because of the widely available second hand clothes with a preponderance of western brands, these are of great inspiration to many Kenyan consumers and designers. They go there to get ideas and inspiration, which has been notified by many traders, as they have started to keep fashion magazines such as Vogue and Elle available, as the fashion stylist explains. In other words, international magazines are something that gives inspiration to many Kenyans. Another sign of western influences are the many western names that are given to shops around Kenya, such as Bloomingdale’s and Harrods, the fashion stylist finalizes.

Regarding the western influences in the Kenyan fashion, it is also closely connected to the labor dress code. The work environment is dominated by an acceptance towards western influenced garments; therefore western styling inspires many Kenyans. The fashion designer and founder of Kikoromeo, designer C, believes that the historical background plays a major part when it comes to the western influences in the modern Kenyan design. Since Kenya has been a British colony, the acceptance towards western clothing is big. She continues describing that the church had great influence in the way Kenyans dress because it dictated what they should wear, which usually included a long skirt and a headscarf.

When observing the different domestic brands available and talking with Kenyans about marketing strategies, the knowledge is revealed to be less developed. Several respondents thought the influences in design should be a part of a branding strategy for a fashion brand, as
they thought this would benefit them. As designer A says, the brand needs to send a clear message to the consumer, where it origins from, in order for the consumer to make the choice whether or not to buy domestic or western. We observed how several domestic brands that received inspiration and influences from the domestic tradition did not include this endowment in their brand communication such as brand logo or website. This also confirms the observations made during the interviews regarding the inadequate knowledge concerning branding and how to utilize the influences as elements in branding strategies.

5.1.1 Analysis

As described in figure 2.2, we can see how well some elements in the brand identity are embraced, whereas others are less developed. For Kikoromeo, the brand as product has been comprised. They have made efforts to link their product to Kenya; the country of origin. This strategy has been a great part of their branding strategy. Designer C discusses how quality needs to be arrogated by more local designers and incorporate in the brand core. As have emerged, many Kenyans do not appreciate local products, but tend to prefer the foreign ones instead. In line with the reasoning by Aaker (2002) and Anholt (2005), the Kenyan products are seen to deliver a low value proposition compared to the western ones. The Kenyan companies have to work on their value proposition, in order to create a higher perceived value and worth. As Kotler et al. (2001) state, working on raising the perceived value is something the Kenyan brands have to do in order to remain on the competitive market.

The empirical data revealed that the western influences are of importance and dominate the domestic fashion industry. At the same time, the Kenyans are patriotic and want to preserve traditional Kenyan aesthetics in modern design. In this sense, country of origin in the brand as a product dimension is of great importance, when discussing what influences are dominant and further, how to corporate this into a branding strategy for a domestic Kenyan fashion brand. A new brand must consider whether or not to link their brand to Kenya. However, because of the post-election violence that occurred in 2007, this must be kept in mind, as Aaker (2002) also discusses the importance to link the brand to a region with positive associations. According to Anholt (2005), it is difficult to sell high price brands to if it is not known for producing high quality goods. For the Kenyan fashion industry, this poses a problem, as Kenyans seem to be patriotic, but at the same time consider west as an ideal society. But this will never be turned around unless the brand starts communicating the Kenyan origin, and of course, starts producing higher quality.

Creating an expressive symbol connected to the background of the brand could also be used regarding linking the product to country of origin. As the empirical data divulges, the original inspiration regarding country of origin for the fashion brand is utterly important and needs to be clear. Aaker (2002) explicates how a symbol can help clarify the origin of the inspiration. If the brand is Kenyan, the customers should be aware of it by seeing it through the brand symbol, even though the design is actually a fusion between western and Kenyan influences. The brand needs to gratify the nationalistic feelings within the Kenyan consumers, but still appeal to their way of dress.

As the design students reveled, western products are admired among young consumers. According to Antonides & van Raaij (1998), these products could be related to the symbolic meaning of products. According to our respondents, the western clothes in Kenya symbolizes accomplishment and can therefore be seen as status goods. Western clothes are viewed to have better quality and design, mainly because they belong to well-known brands and
therefore receive high status. Buying western clothes boost the Kenyans ego since the products make them fit into a certain group in the society. As Levy (1999) also states, a well-known brand is likely to be more accepted than the un-known one, since the consumers think it is more likely to fulfill its intended functions. This theory would explain the high acceptance for western clothes as a result from the awareness of brands. As have been pointed out during the interviews, many well-known brands in Kenya are western, and therefore setting the ideal for acceptance and recognition.

When analyzing the existing brand logos available, the observations show that the brands have not yet embraced the many possibilities within the traditional and cultural heritage. Kikoromeos website and logo does not interpret the cultural heritage they want to communicate with their design. Neither does it communicate the fusion, rather only the western influences. Building strong brands includes, according to Aaker (2002,) to consider all elements in the brand, and which has not been taken into account in Kikoromeos case. When looking at other brands that has not been interviewed, only observed, we can see that the competence within logo design has not been developed very far regarding including all elements.

Most respondents have discussed the value proposition in terms of functional benefits, such as influences in design and influences in price. The emotional benefits and self-expressive benefits as Aaker (2002) explains as dimensions that are of great importance in order to identify a brand, have not been contemplated. As Aaker (2002) describes the value proposition with the importance of emotional and self-expressive benefits, this is something few respondents have expressed and discussed with us. Our observations impart a reality where the brands in Kenya have not yet embraced the many possibilities these benefits can give, which could be a major possibility for the domestic fashion brands to embrace.

Not incorporating emotional and self-expressive benefits in the branding strategies make the Kenyan brands to disregard the relationship between the brand and the customer, which Aaker (2002) speaks about. In this context, the Kenyan brands should to a greater extent communicate the value proposition of the products, in order to create a strong bond to the customer. When creating a strong relationship to the consumers in the market, the Kenyan marketers should also be aware of the importance of the disconfirmation theory, which Antonides & van Raaij (1998) present. The experiences must match the expectations, which many of the respondents tell often not is the case with Kenyan products in Kenya. This makes the customers to consider the Kenyan products as less worthy, since they also judge them in comparison to more highly valued western products, as Antonides & van Raaij (1998) also speak about.

5.2 Way of dress

When making accountancies with Kenyans from different social groups and professions, what strikes you immediately is how well dressed and proper they all look. Noticed from observations is a striking sense of matching and well thought through outfits. The rasta beads hairstyle for women reveals the interest and will to spend time to look nice, since the hairstyle takes one half day to make and has to be repeated once a week. The marketing manager confirms our observation that the Kenyans are very interested and concerned to look nice. She talks about how Kenyans are eager to look nice, regardless of their class. All different classes have to, and also do, dress nice, since it is kind of a social code in the society. You have to show you are a good representative for your origin, as the marketing manager states. In this
context, the expression casual labour has arisen, which refers to the dress code among the working class. The project manager also mentions the fashion interest among the Kenyans. She states that the Kenyans are very keen and fashion aware; even if it is sometimes hard for western people to see;

When I came here I thought it was nice to be away from Europe and the trend hysteria that exists there but after being here I started realize that it is the same everywhere. It is just in different forms, different styles and different trends. (The project manager 2009-04-11)

The project manager continues stating that even the local and tribal people have trends; it is just difficult for us as with western origin to distinguish the different ones. One trend that exists among the Kenyan consumer at the moment is making clothes out of the kitenges - the Kenyan traditional fabrics. Adapting the local into contemporary fashion reveals that there exists an interest for the heritage and the typical Kenyan, which is also confirmed by the teachers at the School of Arts and Design at the University of Nairobi. They speak about the locality as one of the most fashionable trends at the moment. What is interesting is that wearing traditional fabrics and styles now has become popular among the youth, and not only among the elder as before. The design students at the University of Nairobi explain that the traditional fabrics have a great meaning, and it therefore works as a social dress. They continue saying that wearing the traditional fabrics is appreciated differently among the youths. Some like it, while others are further into the more western style.

Apart from the current trend on the streets to wear traditional Kenyan fabrics on modern styles, wearing African outfits is still strongly associated with celebratory occasions in Kenya. According to designer C, the traditional African wear with the long skirts and the big head wraps is mostly used on representations and ceremonies, which also the fashion editor confirms. The fashion editor thinks the Kenyans are very keen to look nice when it comes to more festive occasions, but in the weekdays less bothered. The more dressed up fashion at ceremonies often involves traditional African wear, she concludes.

Though the traditional African clothes mainly are associated with ceremonies, it has also come to light that the Kenyans like to mix and blend the traditional with the modern and also second hand clothes with new ones. Designer A tells that many Kenyans mix second hand with new clothes, for example new jeans paired with a second hand top. They rarely have whole second hand outfits. The project manager reveals that it is not completely accepted to shop second hand, though everybody does it. She explains how she once met a female friend at a second hand market who almost hid herself so she would not be seen shopping second hand.

Designer C discusses the will of self-expression in the Kenyan way of dress. She tells that many of the Kenyans are very conservative and conventional since it exits a belief that one should not stand out too much with their clothes. As she describes it;

I do not know if it is a historical background, but the Kenyans tend not to be too showy. They are interested in how they look, but they are a bit scared to stand out in the crowd. (Designer C 2009-04-07)

Many Kenyans are willing to spend both time and money on their hair, but when it comes to clothes they are a bit more moderated and classical, she puts it. The clothes have to last for a
long time. One female student at the University of Nairobi talks about the importance of being decent during our group interview. A Kenyan girl has to look well mannered and representative so she does not offend her father, she explains.

In addition to the collectivism in the Kenyan fashion culture, it has lately arisen a will to find an individual expression, as the design students at the University of Nairobi describe. On the question what is the current trend among the youths they answer customized clothes. It is getting increasingly popular to design for oneself such as having the personal name of the back of your shirt. It is getting more important to show individuality and this is very much influencing the way of dress. People are becoming keener on showing their own personality, rather than just copying others style. They conclude by expressing how dressing in their own culture could be a way to find the individuality and self-expression.

5.2.1 Analysis

The Kenyan way of dress reveals much about how the consumers view brands and products, which can be related to figure 2.2, originated from Aaker (2002). The Kenyan concern to look nice and respective can be related to dimension where the brand works as a product that gives a value to the customer. As mentioned, the clothes works as symbols of both emotional and self-expressive benefits. Dressing properly or individual can be analyzed as an indication of a personal self-expressive dimension. In this context, we can regard the dress code within the working environment in Kenya as a self-expressive benefit, where the clothes classify and define people to different social classes and professions.

The up-coming trend to use traditional Kenyan fabrics in modern garments can also be analyzed from Aaker’s (2002) brand identity planning model. The use of these types of clothes fulfills a purpose of showing interest for the heritage and in that way expressing one person’s choice and individuality. When the products have created this kind of meaning within the consumers mind, it has evolved a personality that according to Aaker (2002) can be understood as a significant factor that will make them stay strong and present for a long time. As the fashion editor says, the traditional Kenyan clothes communicate celebration and festivity, which also decides its time of usage. The western clothes, on the other hand, have emerged to have a more casual and everyday usage. In this sense, the two different types of clothes have two different personalities, which, according to Aaker (2002), strongly affect its place in the consumers mind. As Kotler et al. (2001) say, if one brand has succeed to develop a personality, it will catch the attention of consumers who identifies themselves with the image of the brand. This can be linked to the Kenyan way of dress, since the many Kenyans who dress in western clothes can be said to adore the western life and culture.

If it is as Anholt (2005) claims; that a prominent exclusive target market is less interested in being related to the traditional, it needs to be discussed and evaluated by a new brand. Does Kenya as a country express exclusive quality or not? As has been shown by the empirical data, many Kenyans choose to wear domestic brands at festive occasions, which show that the modern exclusive consumers rather choose domestic brands over western brands. According to Aaker’s (2002) theory of the country of origin, the heritage and origin might be of major importance to communicate in the brand strategy.

According to several respondents, and as mentioned, the brand is usually defined by the occasion of wear, for example work outfits. As part of a branding strategy, a brand manager must consider the usage of the brand, for example whether it is going to be fashion, safari,
labor or leisurewear. Either chosen design, it should be linked to the brand so a relationship to the customer can be created. The traditional Kenyan clothes are mostly used at ceremonial occasions, which can be understood as a result of the use aspect of the brand as a product dimension. For Kenyans, these types of garments are associated with these special occasions, which can set a limit to its usefulness. Thus, this has starting to alter since young people are starting to wear traditional fabric in modern styles. According to Aaker (2002), the traditional costume can also work as a social statement and symbol of the past. Depending on the relation to the past, the representation can both provoke positive and negative associations for the customer, which, according to Aaker (2002), is something that has to be taken into consideration when analyzing a market.

Finally, the Kenyan consumers’ view of the second hand clothes can as well be linked to Aaker’s (2002) theoretical model regarding the origin of products as the origin of the second hand clothes influences how the customers view its value and utility. Since second hand garments are not completely accepted, the origin of these clothes has a negative effect. In this sense, the second hand clothes create a value proposition that is not a part of most of the Kenyans ideal self-concept. And as Aaker states (2002), to oppose this, consumers buy products that support their ideal self-concept. In our study of Kenya, that would be new clothes.
6 Contemporary success factors

This final part of our empirical findings, and the following analysis, shows what our respondents thought was the most important factors for a new fashion brand and what needs to be considered regarding the Kenyan fashion market. The empirical findings will be presented related to the nine dimensions of quality that were presented to be of importance in figure 2.3, adapted from Kotler et al.

6.1 To access and to know your market

Many respondents stress the importance for the Kenyan consumer to have easy access to the fashion brand and their products, and access from both a location aspect and pricing aspect. This has by far the majority of respondents emphasised as the most important factor, mainly because the second hand trade has had a huge impact upon the industry and consumer behaviour.

Designer C states that a good location would presumably increase sales, since the Kenyan fashion consumer tend to shop where all goods are collected into one area. They prioritise easy access; this is mainly because of traffic jam, which is a huge problem not only in Nairobi, but also all over Kenya. The people that are working, are the people that is buying the most, and also the ones with the least time. This is the main reason for them to have easy, quick access to all their shopping into one area, so that shopping can be as little time consuming as possible. The collected shopping area concept is furthered agreed with the fashion stylist, who confirms that Kenyans will buy what is available for them and this is a major reason many of them go for the second hand trade. She continues explaining the reason consumers buy second hand:

The thing is that the Kenyan brands are not available, not as the second hand. Second hand clothes you find everywhere and in huge quantities, and that is why many Kenyans buy second hand instead of Kenyan brands. (The fashion stylist 2009-04-03)

As presented earlier, second hand clothes are easily accessed since the markets are everywhere, available in all cities and villages and the wide selection of styles and sizes makes it also easily accessed to all ages and genders. She continues explaining that the existing domestic fashion brands are only available in Nairobi and that the possibilities for the rest of the citizens in Kenya to access these brands are small. In her opinion a new upcoming brand should start a chain with several shops, in order to access more customers.

Designer B declares how the importance of good locations makes the easily accessed addresses popular, and as a result of this, also very expensive. This means that the local designers have difficulties getting access to these approved, easily accessed locations, because they cannot afford it. Instead these locations are occupied by western brands or other more prominent industries, such as computers and cellular phones. In contrast, for the second hand trade there are many big markets that are easy access for the Kenyan consumer. The massive amount of second hand clothes results in excessive competition regarding the access.
The second hand markets gives furthermore easy access when it comes to prices. For obvious reasons the second hand trade has given the Kenyan consumer a habit where they are extraordinarily price sensitive and according to the project manager, Kenyan fashion has to be cheap when competing with the second hand trade. Comparing the prices for a new shirt and a vintage shirt is not realistic; nevertheless for the Kenyan consumer affordability is essential as the marketing manager says:

At the end of the day it all comes down to costs. Because I want to look good, and I want to look good to the most economical price. (The marketing manager 2009-04-07)

The fashion stylist states that because the Kenyan consumer is so used to the low prices, they have difficulty understanding all the work that has been put into designing and producing new garments. Because of the weak understanding of the great effort that increases the prices, the domestic brands must justify and explain to the customers, why they have higher prices. The Kenyan consumer tend to not appreciate the design and garments, unless they are a well-known brand or from a western country. Western brands do not need to justify their higher prices, because the brand itself is a justification of the price. This is closely related to the low understanding for the fashion designer profession and all the time consuming work that it involves, the fashion stylist finishes.

Another problem that most respondents agreed upon was that the domestic fashion brand has low credibility, that the Kenyan consumer does not trust the domestic production and design. As stated earlier, the Kenyan consumer demands a justification from the local designers regarding the higher prices. This is closely related to the low trust that the Kenyan consumer has regarding local designs. It also explains why the Kenyans tend not to want to pay the higher prices for the locally designed garments. One of the design students at the University of Nairobi explained why the majority of the Kenyan customers do not trust the domestic fashion brands. This is according to a historical effect from the colonial time. Many Kenyans have low self-esteem when it comes to create something on their own, and according to the design student; the Kenyans do not appreciate their own art and design. The design student’s belief was that in order to increase credibility, Kenyans must strengthen their belief in themselves.

The different interviews with the domestic fashion designers were all remarkable, in the way they stated the importance of the knowledge regarding the consumers wants and needs. The marketing manager accents that knowledge regarding the Kenyan customer and the Kenyan market is of great importance. As a new brand enters the Kenyan market, its marketer must do research regarding the target customer, what price is suitable, what styles are demanded and trendy and how the market is developing. If the marketer do not know the customer and his or hers needs and wants, all marketing strategies are less helpful. In this context, designer A also declares the importance of market research.

6.1.1 Analysis

As figure 2.3 shows, expectations of a brand is a combination of all the dimensions concerning quality, together with advertising, word of mouth, previous experience and the needs/wants of the customer. According to the model, a less easily accessed location and pricing will affect the perceived brand quality, since it needs to suit the buyers’ need.
Credibility would affect the brand quality, since negative word of mouth and other consumers past experience definitely will affect the expectations of the new customer. As mentioned in the empirical data, negative word of mouth from bad past experiences regarding low product quality of the local brands, influence the expected quality and in the long run, also according to our model, customers perceived quality of the brand.

As Kotler et al. (2001) describe, all dimensions are crucial to consider, when it comes to customer expectations. Because of the present situation in Kenya regarding local brands with low credibility, the model confirms the negative effect word of mouth has had upon the expected brand quality. The local Kenyan brands should consider the negative word of mouth and the effect of bad experiences.

The knowledge regarding the consumers in Kenya is crucial; as have been stated by several of the respondents. Kenya consists of more than 40 tribes, has a big rift between classes and also a big rift between city and countryside, which reveals quite many different kinds of consumers. Whatever customer the fashion brand chooses to target, it needs to be clear and focused and have great knowledge regarding the needs and wants of that customer. If not, both advertising and the word of mouth, might give the wrong expectations, and therefore a risk for negatively perceived brand quality. As stated in earlier sections regarding the Kenyan consumers inspiration and influences, these factors need obvious consideration. Kikoromeo is a good example of a local brand that practices good access, as they have several shops in the centre of Nairobi, they have affordable prices towards the expected consumer and also, they are aware of who their customer is. This in combination with some advertisements has created a positive word of mouth. In Kenya, we experienced several Kenyans discussing Kikoromeo in a positive manner.

6.2 Importance of quality and trust

In accordance to the credibility, which was related to the Kenyan customer not trusting the domestic fashion brands, reliability is also mentioned as one success factor. This is closely related to the next factor, competence. The observations during FaFa’s Fashion for peace gala indicated the low product quality delivered from some domestic fashion brands, as well as some respondents revealed; the quality was not especially proficient and consistent. This is further confirmed by the fashion editor as she talks about the domestic brands quality:

> Quality wise it is always better to get garments from outside Kenya. Here in Kenya, you can always get a pair of trouser for a cheap price, but for better quality you should go to Europe. (The fashion editor 2009-04-03)

When we asked designer C regarding the future for the domestic fashion brands in Kenya, she emphasised the reliability as one important factor. She explains how several domestic fashion brands have been unable to deliver what they had promised regarding product quality and delivery times. Problems linked to quality could be colour coming out from the garment when washing it, garments not keeping their fitting after usage, bad fabric and other quality shortages. These incidents all affect the trust of the brand and must according to designer C be better handled and there must also, as we will discuss below, be a rising of the internal competence within the company and within Kenya.
When the quality complaints occur to Kikoromeo, they immediately exchange the garment or return the money to the customer. By doing so, designer C believes the customer will still be loyal to the brand and come back, because they still experience the brand reliable. According to designer C, if Kikoromeo would not accept the complaint from the customer, the brand would be destroyed and the customer would not return, and would not consider the brand reliable. This would also in her opinion make customers complain about the brand to other possible future customers.

The fashion editor explains that, she as a consumer would rather buy quality outfits in Europe than the domestic brands. The reason: You get better quality there for the same price than in Kenya. Designer C declares the low standard that exists in the domestic fashion design schools. They have low quality and competence level and do not give the students the appropriate tools to develop their business within the fashion industry. This is the reason many established fashion designers have attended international design schools outside the country. Designer C has employed design assistants at Kikoromeo, that she has been forced to train from start, since she had a difficult time finding competent assistants. She explains the importance of the competence with fitting and design, in order to succeed at the Kenyan market. Standardised sizing is not yet widespread within the Kenyan fashion profession, but it is growing. To be able to produce a collection, the competence within sizing must exist and a will to create better product quality. This is agreed with designer A, who claims the government must support the local fashion designers and fashion brands, but also the textile industry. Otherwise these brands will stagnate. She agrees with designer C that the design schools must improve their standards, in order to strengthen the competence within the fashion design profession.

Because we are textile manager students, it was difficult for us to ignore the observations made regarding the quality of the domestic fashion design garments. It was unfortunately quite low and this was also agreed upon by the respondents. At our visit to the Textile Training Institute in Nairobi the machinery was extensive, but slightly outdated and from what we could experience, this was also the case with the educational level. When visiting the University of Nairobi, the classrooms and the equipment available was very limited and outdated. This confirms the information given by several respondents regarding standards of the design schools in Kenya.

As mentioned before, the difficulties accessing financial loans from banks and the lack of investments from the government is a problem. This gives further pressure upon the creators for a new fashion brand, to be able to represent themselves in front of investors. The schools today do not provide enough business preparations, which means that the bank or other financial investors do not take the graduated students seriously. Designer C tells about a governmental initiative in South Africa that gave impact on the domestic fashion industry. What they did was simply to empty an accessible building where they installed several machines and gave the necessary equipment to the non-established designers to use. This helped these designers to get started. According to her, Woolworth’s, a well-established chain, has a plan to open up some space in their shops for local designers to use and sell their garments. She concludes that even though people involved in fashion in Kenya has started to think about the importance of the growth for fashion, more initiatives need to be constituted in Kenya. It needs to be several different kinds of interest groups involved, not only politicians, in order to strengthen the competence.
As declared earlier by the marketing manager, knowledge regarding who your customer are and the needs and wants of that person is essential, in order to be able to respond to their needs. Designer A emphasises that market research is essential; otherwise you do not know how to respond to your customer. She continues discussing the importance of being able to respond to the demands of the market, as this in her opinion is a key to be able to establish on the Kenyan fashion market.

6.2.1 Analysis

As figure 2.3 shows the importance of reliability, this is also something described by Sitati, the executive director with Interbrand Sampson East Africa and the chairman of the Marketing society in Kenya:

The hallmark of building relationships is promise keeping. No brand worth its salt, big or small, can survive if it keeps on breaking its promises. This means there has to be a clear promise in the first place and a sense of consistent delivery perceived by the brand’s desired target market. (Sitati, 2008)

The reliability is one reason the customers stay loyal towards Kikoromeo, since Kikoromeo keep what they promise, according to designer C. To embrace the possibility to strengthen the credibility and reliability, more domestic brands should handle their complaints like Kikoromeo does. Gummesson (2005) discusses the importance of managing complaints due to the customer relationship, which can be seen has not been the case according to the empirical data. The fashion editor states how she would rather buy quality clothes in Europe instead of the available domestic fashion brands, since she had a bad past experiences with the domestic brands. This shows that the local brands do not handle the complaints or do not recognise them, and do not identify part time marketers as a phenomenon.

Reliability gives positive word of mouth (see figure 2.3). Despite the bad past experiences some customers has had, the expected brand quality is still high, since Kikoromeo were able to turn this around by returning the money or give a new garment. Even though the experience was bad from the beginning, the customers come back and stay loyal. This shows that a bad past experience, can be changed if reliability is kept within the mind of the domestic brand manager.

Anholt (2005) states the importance of adequate product quality for brands in developing countries, such as Kenya. The domestic universities and fashion design schools must improve both in available equipment and educational skills, in order for the competence level to increase for domestic fashion designers and brands. As figure 2.3 shows, unless the competence level increases within the domestic industry, other local brands will have difficulties establishing on the Kenyan market, primarily because of bad past experience or negative word of mouth regarding the reliability and competence of local brands.

6.3 Reach out to the customer

Combined with availability, designer C continues describing the problem regarding awareness. She claims that the customers are not aware of the brands availability. She often hears how consumers appreciate a brand, but do not know what brand it is and where to buy
the specific garment. This is something that designer A highlights as a major success factor: to make the customer aware that you exist.

She also declares the need of a network of people working together in order to develop the awareness for fashion among the consumers. This would include the government, the fashion designers, and the outlets working together. The people involved should create a strategy in order for the industry to grow and create a bigger awareness for Kenyan fashion.

The marketing manager has ideas regarding how to create the awareness for a fashion brand. Events are one idea. This is a reason she, together with the people from the FaFa organisation, created the Fashion for Peace gala. They wanted to create a buzz for design and fashion in Kenya, bringing people together to see and discuss what Kenyan fashion design has to offer and hopefully create a bigger market. She explains that consumers in Kenya desire what is displayed on the catwalk and this increase the awareness, which she believes will increase sales. When creating these kinds of events, media will be present and give the attention and also increase awareness.

Designers have not franchised out to the country, so the designer is known in Nairobi and Nairobi only. This creates a situation where someone back in another city probably will not know about the brand.

(The fashion stylist 2009-04-03)

The problem regarding awareness is here emphasised by the fashion stylist and also stressed by designer A. Designer A declares that since the consumers seem to prefer western brands, the consumers must be more aware of the accessible local brands. The problems concerning awareness was also expressed by the brand owners and designers at Obad wear, a small local jeans company located in the city of Nakuru. The impression we got during the observation at the brand’s office was modest knowledge regarding how to make the customers aware of the brand. The brand owners had little experience and few ideas regarding how to make Kenyan consumers aware of the brand. The overall impression during the field study is the thin acquaintance regarding marketing strategies within domestic fashion brands, with few exceptions such as the brand Kondaki and the brand Kikoromeo.

When it comes to the likability of domestic fashion brands, the marketing manager believes that workable and flexible styles are of significance. She elucidates how Kenyans are interested in domestic brands and that they would choose domestic brands over western brands, if they would like the garments. A describing example of how Kenyans chose domestic instead of an international well-known brand is the Tusker beer, which designer A tells us about. Tusker is a Kenyan beer that holds a strong brand on the Kenyan market. A couple of years ago, a well known South African beer brand tried to penetrate the Kenyan market, but without success. The reason was that the Kenyans were not only aware of the brand, but they stayed loyal because of the likability. Designer A believes that there is a great future for domestic Kenyan fashion brands, and that Tusker is a great example of the potential in domestic brands. The Kenyans are apparently, according to designer A, able to like domestic brands, and choose them over other international well-known brands. She continues saying that if a domestic fashion brand were able to produce what Kenyan consumers like, this brand would be able to be established.

Fashion is characterized by new trends and styles and our observations reveals how this is the case for the fashion industry in Kenya as well. As stated before, the fashion stylist addresses
the effect the second hand trade has had on the Kenyan consumer regarding style. She describes a reality where the customer is sensitive to style and demands an updated wardrobe. At the same time they are not big shoppers and it still takes time for them to adopt the trends. The trends are not as up to date as in most western countries, but as the project manager confirms - the trends are there and the consumers follow them, only a couple of years behind. Designer A verifies this and explains if pink is trendy one season- everyone will wear pink. And if you are active within the fashion industry, you must be able to adapt to these trends.

Innovation is also something the design students at University of Nairobi emphasise. In order to establish yourself on the Kenyan market, you need to come up with something new and innovative. Do not do what everyone else is doing. Designer D disagrees with many of the respondents, when she declares that the traditional African aesthetics is not very important to keep in modern Kenyan design. Why look back, when you can look forward, she discusses. Being innovative is the key to success in her opinion.

6.3.1 Analysis

The buyers’ needs is of significance (see figure 2.3) and, according to the empirical data, trends are of importance, which means that brands must be adaptable to new trends and contemporary issues, in order to succeed at the Kenyan market.

In accordance to figure 2.3, we have found that there is often a well thought idea behind the different local fashion brands, but little knowledge regarding branding and marketing strategies on how to communicate the brands. The ideas are great, however without proper knowledge regarding the consumer, the ability to make the brand accessible and make the customers aware of that the brand exists, the increase of sales will not occur, as well as any perceived brand quality.

Visiting the jeans brand Obad wear was very interesting since it showed the importance of all dimensions, as figure 2.3 show. Obad wear is quite accessible both in pricing and locations, the brand owners had great knowledge about who their customers are, the competence level regarding design and quality was quite high, the brand was quick in responding to the market and they were adaptable to new trends. Though, the lack of one dimension: awareness, gave the brand little perceived brand quality. Obad wear have not made engaged efforts in making a visible entry on the market. The customers are simply unable to have expectations, since they are unaware of the existence of the brand.

The limited competence level within brand management and implementation has given a less developed industry, in comparison to the industry in western countries, which sympathises with Anholt’s (2005) ideas. The owners of Obad wear did not know how to build a brand and the knowledge within branding for Kikoromeo was limited. Further, among Kenyans in general, the observations and meetings suggested a reality where no one knew that branding was one way to go, in order for the industry to develop. But as Anholt (2005) also emphasises, this development towards stronger brands needs to correspond to the product quality given by the brand and company. Since the competence is inadequate, this gives implications to the government, universities and companies around in Kenya, to embrace their country of origin and proof to the Kenyan consumers, that they can produce just as adequate quality as any other western brands. Anholt (2005) emphasises how first the implementation of quality control must be improved, and not until then the more advanced branding can start!
7 Conclusions

What forces and influences shape the fashion industry in Kenya?

We have found that the fashion industry is less developed in Kenya compared to the Western fashion industry. One reason for this is the low governmental interest that has consequentially given the design profession a low status. This influences the possibilities for the industry to grow. We have concluded that a governmental involvement should to a greater extent be implemented in order for the industry to develop.

The lack of investment is also a great factor that influences the possibilities for the domestic fashion industry. This seems also to be closely connected to the low status and the low interest from the government. Further, the absence for understanding the importance of branding and marketing by the professionals within the fashion industry also shapes the possibilities for the industry to grow. This means that the brands are less developed and therefore have difficulties competing with Western or South African brands.

The extensive second hand trade has a great impact upon the local fashion brands. The acceptance towards Western design and inspiration is substantial and this obviously shapes the inspiration for domestic designers. Further the second hand trade has given a reality where the Kenyan consumers are extremely price sensitive and are used to low prices, which aggravate the domestic brands to raise prices. At the same time, the middle class is growing and the interest for domestic fashion brands has been revealed to be very strong. This implies market possibilities for the industry, as this will raise a greater demand.

Which prominent success factors is it possible to discern in order to establish a new domestic fashion brand on the Kenyan fashion market?

There are nine factors that are of importance to consider when establishing a domestic fashion brand on the Kenyan market; access, credibility, knowledge, reliability, competence, responsiveness, awareness, likability and adaptability. We have however concluded that some specific factors are more crucial to prioritize when entering the Kenyan fashion market.

Access forms the first crucial success factor. In order to be competitive with the second hand trade, this is concluded to be of great importance both in terms of price and local access. The local brands must work harder to make the brand more available. Another conclusion drawn from the analysis is that branding is one strategy to motivate the higher prices.

The credibility is also another major factor to consider in order to succeed on the Kenyan market. This needs to be strengthened so the Kenyan brands are competitive towards Western and South African options.

To raise the competence, we find that the government must invest in design schools and the reputation for the profession must receive higher status. If the competence level is raised among the existing local brands, the credibility and reliability will be increased and in the longer term: higher status for all local fashion brands.

The awareness among the Kenyan consumers must be raised. The reason they are unaware of the local brands is because of the brands’ absence of marketing strategies. If the
implementation of branding strategies would increase, so would the awareness among the customers.

Regarding the contemporary style and trends, there are no easy answers. One thing is clear: having knowledge regarding what market to enter and what the market demands is crucial. But due to a number of factors; such as the growing economy and population, the growing middle class and the existing interest for clothes and fashion, one thing is for sure; Kenya holds great potential for developing a strong fashion industry, since it has the necessary conditions to succeed.
8 Final discussion

In this chapter a discussion and evaluation regarding the critical issues validity and reliability of the thesis will be presented. The chapter will end with our thoughts upon the thesis and with suggestions for future research. These suggestions will be based upon the limitations of the thesis.

8.1 Validity and reliability

In this thesis, we have considered both reliability and validity. Reliability is a measure whether the research study is authentic or not. In order to receive strong reliability, the result from the study should be the same if repeated. The researchers’ skills to collect legitimate data and handle this information accurate are two important variables in order to guarantee the reliability of the research. Validity focuses on relevance, the choice of theory and collected empirical data is of importance and shows if the researcher investigated the intended research question. (Andersen, 1998) It is moreover of significance to remember that the data collected is not the reality, it is only a representation of the reality (Larsson, 2000).

The intended research question was investigated and the chosen theories and empirical data are relevant and appropriate for both research questions. The validity among the respondents can be considered as high. The language was no problem, since all our respondents spoke fluent English. The researcher found that the questions were never to be misunderstood and repeated. The interview with designer C was a little bit more intense than the other interviews, since she was quite busy and stressed. This has been taken into account when analysing her answers. The answers can still be considered very reliable, since she took time to perform the interview and answered very informatively upon the given questions.

All interviews were video recorded, in addition notes were also taken. By recording both the visuals and the oral, we were able to discuss, transcribe and conclude the material several times. By doing so, many details were considered such as body language and the respondents’ reaction to the questions.

We have further considered the way we presented ourselves in terms of clothing. In order to receive as trustworthy answers from the respondent as possible, we have adapted the clothing to be appropriate for the selected respondent. Since our study concerns fashion, this has been important to contemplate. The interview guide was tested before the first interview, in order to evaluate the questions. However, one question could be discussed if it may have been leading, which is taken into consideration when analysing the answers.

Most interviews were conducted in quiet areas such as the respondent’s home. This environment was also chosen so the respondents could feel they were able to answer the questions as freely as possible. However, the interviews with the marketing manager and designer C were performed at Kikoromeo’s head office, which could influence the answers from both respondents. The interviews were performed in a separate area, in order to avoid the respondents to be disturbed by other things or distracted from work. During the interview with the fashion stylist, her cell phone rang as she was answering one question. This might have affected the reliability regarding that specific question, but has been taken into
consideration during the transcription. All interviews were recorded, transcribed and then categorised, discussed and summarised.

8.2 Critics of sources

The thesis is a cross-cultural study in which we have used western brand management theories and applied them on the Kenyan market. Coetzee (1998) describes how some concepts only exist within the western civilisation, such as the belief that the evolution of culture goes from primitive to advance. We have taken this in consideration, when applying our western theories to the empirical data collected in Kenya.

The lack of previous studies, articles and theories regarding Kenyan fashion brand management must be taken into consideration. However, we believe it was interesting to apply western marketing theories and investigate if they were applicable or not. We found that this was possible, but that the Kenyan marketing environment and the fashion industry has not developed as far as in most western countries. The chosen theories are well known and comprehensive and were selected because of the appearance of the domestic fashion market in Kenya. For that reason, more advanced western marketing theories would be irrelevant, not applicable on the Kenyan market, and therefore not suitable for our research.

Due to our time limit, we were only able to interview a limited number of professionals within the Kenyan fashion industry. We selected these individuals carefully with consideration to our problem discussion and purpose of the thesis, so that they were directly connected to our thesis. Whether we picked the correct respondents or not can be discussed, nevertheless we believe considering the time limit and the extent of the thesis, the sources are relevant and reliable. The actual visit to the country and meeting with the many different respondents strengthens the empirical data.

8.3 Our thoughts and recommendations

The fashion environment for people working with fashion in Kenya has been revealed to be complex and tough. Many of the respondents appear to feel discouraged and opposed, because of the low interest from the government and the strong dominance from the second hand industry. Though, a great interest for fashion in Kenya has been found, as many of the Kenyans have appeared to be very interested in how they look and represent themselves. Though all Kenyans seem to have an interest in fashion, we have concluded that the market consists of very many different consumers with different needs.

The Kenyans appear to have low self-esteem when it comes to their own capacity in arts and fashion. It is the foreign and western that forms the ideal and standard in Kenya, not the domestic. Because of the low credibility of the Kenyan design, the western forms a great influence in the domestic fashion, which many of the respondents seem to appreciate and value. Lately, there have come up fusions between the western and the Kenyan in the domestic fashion, which seem to appeal the middle and upper class, but not the less wealthy ones that mostly crave western products since they represent an ideal world.

When it comes to making the Kenyan consumer aware of the existence of the Kenyan brands, word of mouth and creating a buzz, is one effective way, and also has a low cost. Using the widespread virtual community Facebook could increase this awareness. Several Kenyans appeared to be members of Facebook, but no Kenyan companies and brands are represented
in this community. Several Swedish fashion brands have joined this virtual community and it is a budget method to market a brand, and in our opinion also efficient, if the brand has a young consumer. Since Kenyans have been showed to have the tendency of imitate other people and to receive inspiration from TV, we think product placement towards celebrities and prominent persons can be another marketing tactic of having attention.

To increase access our recommendation would be to try to make the brand available at many places in Kenya. Another possibility would be to start a multi-brand shop, where several designers together start a shop, in order to keep costs down. This is something we never saw during the field study. Starting a web-shop would also be good idea, since Internet has been noticed to be widespread all over the country and does not limit the brand to one local area. When it comes to the slightly higher prices than the second hand, it is all about branding, since it justifies the higher price. We also found that all respondents believed that building a brand with all the discussed dimensions would make the Kenyan consumer choose the local fashion brand instead of second hand.

8.4 Further research

The lack of previous exhaustive research within the Kenyan fashion industry makes further studies interesting. The increasing middle class with a stronger demand for fashion makes this subject current. This thesis has focused on performing in-depth interviews with professionals within the fashion industry. One possible research aspect would be to investigate the buying behaviour further, to conduct either in-depth interviews with consumers or study statistics regarding consumer patterns within the Kenyan fashion market.

It would also be interesting to study the Kenyan consumers attitudes towards domestic fashion brands, western fashion brands and second hand clothes. We were unable to find any studies regarding consumer behaviour within the Kenyan fashion environment. Therefore, this would be an excellent complement to this thesis.

Finally, to more deeply investigate the economical effects of a rising fashion industry in Kenya would be very interesting. From an economical development point of view, it would greatly benefit Kenya as a country with a developed fashion industry.
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45


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  - Mule Kelly, Ruth
  - Mwangi, James
  - Njue, Timothy
  - Pius, Kilonzo
  - Thinguri, Faith
Appendix 1

Following questions represents the guide that we have used for the in-depth interviews with our respondents in Kenya. The questions are thought to be flexible so that they can be adjusted for each situation and respondent.

1. Tell us about yourself and your background

2. How are you involved within fashion in Kenya?
   a. For how long have you been active in the fashion industry in Kenya?
   b. What is your main contribution to the fashion industry in Kenya?
      (design/initiative..)

3. What do you think about the fashion environment in Kenya?
   a. Do you think Kenya has a lot of (cultural) creativity?
   b. Is the Kenyan person interested in how they dress?
      i. How do they dress? Can you give an example?
   c. Do you think the second hand trade in Kenya has had an impact on the domestic fashion industry?
      i. How?
   d. Does it exist an interest for domestic fashion brands in Kenya?
   e. Do you think there is much western influence in domestic Kenyan design?
      i. Why is that? Can you give an example of the western influence?
   f. Do you think it is important to keep the traditional Kenyan/African aesthetics/forms and colors in modern Kenyan design?
   g. What to you think sells the best among the general Kenyan buyer- clothes with western influences or clothes with traditional Kenyan/African influences?
   h. What do you want to highlight with your fashion design / work / initiative?
      i. The importance of preserving traditional aesthetics or showing the new modern Kenyan expression?

4. How can Kenyan fashion be established on the Kenyan market?
   a. How do you think an interest for domestic fashion in Kenya can be created?
   b. What do you think the success factors are to attract the Kenyan consumer to a Kenyan fashion brand?
   c. Do you think building strong Kenyan fashion brands can, to a greater extent, make the Kenyan consumer chose Kenyan fashion instead of second hand?
      i. Is there a market / demand for domestic fashion in Kenya?

5. In the future, how do you look at the domestic fashion industry in Kenya?
   a. Do you think there will be an increased interest for domestic Kenyan fashion in Kenya?
   b. What do you see yourself do in ten years?
Appendix 2

  “Brand Identity Planning Model”, fig 3-3, p 79