

Panel Researching in Study of the Competitive Environment in Clothing Market

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Abstract

Satisfaction of demand to necessary products for society life is the important problem of each state and a basis of definition of a standard of well-being of the population. The analysis of a condition of the market of clothes and definition of strategic targets on perspective changes are very much pressing questions. In given article possibilities of use of a method of panel research are considered at an estimation of the market of ready-to-wear clothes and its changes.

Keywords: Assortment; Household; Marketing; Market of clothes; Marketing research; Panel research; Segmentation family; Wardrobe of family

Introduction

In the formation of a competitive environment in the light industry market, the key factor is the structure and width of the assortment. Many scientists conducted research on problems in determining the range of strategic goals, including: an analysis of A Ansoff's matrix "commodity-market", D.Abell's matrix of the "center" of the ABC model, XYZ, the "Marcona" model, the "Dibba-Simkin" method. There are a number of scientific studies on the competitiveness of the assortment of light industry goods [1-11]. In these scientific researches methods of management of formation of assortment of the enterprises are reflected. Theoretical and practical aspects and methodological foundations. The problems of assortment policy development for light industry goods were investigated [12-14].

The issues of household research and the formation of demand have been widely studied in the scientific works of the honorable Russian worker of professional education, the scientist Burdenko [15]. It scientifically proves that the basis for shaping the demand for light industry products are income, seasonality of fashion, age and gender categories.

In our study, the subject of study is researching the state of competition in the light industry goods market and the formation of the assortment strategy of local enterprises, the panel method is used in the study.

Method

The method of panel research is one of the most widespread methods among marketing researches. Panel research is a data gathering from the selected respondents [16] from house economy by repeating interrogations in intervals where accurately defined duration of time are. Often term the 'panel' is used as equivalent with the term repeated research. The panel consists of sample of respondents, usually households which agree to give the information with certain intervals throughout the long period of time [17].

Panel research respondents would be compensated by organization leading it and they would be rewarded with various means, for example, gifts, certain amount of money, information and others. Investigation of families and their members' wardrobe assortment and its content gives great chance to assess consumers market. Therefore it is appropriate to use panel research in order to study consumers' wardrobe.

Household is considered as panel research participants. Household is the group of people who run household and live in a certain address, by combining their income fully or partly [17]. Observation is led by interviewer [18]. Results of research could be wrong, unless the chosen participants of households are rewarded.

Due to panel research, the formation of wardrobe assortment of consumer's could be studied and used in practice, widely. In addition it helps to study the proportion of competent in assortment, and analyze the various aspects of consumer segments according to the assortment.

For panel research, households would be given daily form so, as to record research results. Moreover, nowadays daily media panel research is becoming popular. As online-forms are being used widely, they are giving great opportunity to define during the purchase process [19]. So that to depict the form's information we focused, on clothes of families that have accumulated during a whole year and the forms have collected in final month (December) of the year. During is process respondents fulfilled the forms with the data about the amount of apparels which have been included to their wardrobe during the year.

Results and Discussions

Usually the outcome of research gives information that is beneficial to study the impact of socio-financial course on living standards of population and improve well-being of nation, developed consumer commodities market, to take additional measures to form basket of goods [19].

Tables 1 and 2 depict the questionnaire that we have conducted for Panel research. It consists of two parts, the first gives information about family and its member's, also special characteristics about family member's segmentation. In the second part, there is the number of clothes of each segment that have been included to the family wardrobe during the year that is marked with special signs.

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Segmentation criteria	Segmentation of family members number and their sex	Segmentation family members by age group	Segmentation family members by their income	Segmentation family members by their education degree and profession
Segment aspects	Men, women, the number of men in the family, the number of women in the family	Pensioners (above 60), middle aged (between 31-60), adults (between 17-30), pupils (between 8-16), children (between 0-7)	Assessed by 5 quintal	The number of members with higher degree, the profession of head of family

Table 1: Determining the segment aspects of consumers [17].

Name of apparels assortment	Amount of purchase (recorded during the year)	Country of origin of the product (main competitor-countries)	Shopping destinations	Price of purchase
Mass and elite assortment, hand-made apparels, knitted garments, underclothes, socks, shoes	Recorded in nature	Uzbekistan, Russia, Kazakhstan, Turkey, China and other main competitors	District city, in the countryside, supermarket, department, store, shop, boutique, stores of specialized firms, market complexes, tailors and others	Price of each ready-made apparel would be recorded.

Table 2: Assess the content of segment [19].

The purpose of Panel research by conducting the customers' ready-made apparel wardrobe is given below:

1. Identifying the family's purchase of apparels and their changes in content;
2. Improving living standards of household, assessing the assortment content of purchasing clothes according to the changes in demand;
3. Estimate the ready-made clothes market according to the results of purchased goods assortment changes;
4. Intensify competitiveness of clothes' manufacturers and traders and corroborate their assortment policy, scientifically in the future.

In the questionnaire given to respondents, all family members make a record of clothes, which they have included to their wardrobe during the year. Outcome of each questionnaire is being attached to the program Excel and SPSS statistical program. From the forms given to the families results recorded in Table 3.

Big changes have not been noticed in family and in its members' content. The amount of purchase by families' segment group is illustrated in Figure 1. There have been assessed the amount of purchased apparels by family members and changes during year 2012-2014, the proportion of competitors.

The purchase of ready-made clothes percentage of our national products among old-aged in families is high (women 54% and 56%, men 69% and 69% in 2012 and 2014, respectively). The demand of elderly people for national clothes (such as oriental robes) is increasing due to hygienic and climate conditions. In addition, they are actively, participating in weddings, traditional ceremonies, which in turn brings to high need for modern clothes (suits, coats) and they are purchasing clothes made in foreign countries.

Being considered the most attractive segment (in terms of purchase amount) adults' apparel share, made in Uzbekistan is lower than old-aged (women 32-31%, men 67-69% in 2012 and 2014 respectively). Because manufacturers have to meet certain conditions of this segment, its percentage remains low. On the contrary, there is higher need for men's finished apparel. As the main assortment of men's garment consists of coats, suits and shirts, they are not so sensible to fashion changes. In addition, there is being formed demand for national garments of women, as the main part of women in this segment prefers clothes offered by family businesspersons and in many cases of imported apparels do not meet their figures' special needs.

The youth is regard as an insistent segment and show high level of

Age group of family members	Year 2012	In percentage (%)	Year 2014	In percentage (%)
The number of families	500	100	500	100
The number of family members	2790	100	2775	100
Above 60	146	5.2	150	5
Women	95	3.4	109	4
Men	50	1.8	41	1
Between 31-60	861	30.9	860	31
Men	465	16.7	527	19
Women	455	16.3	333	12
Between 17-30	620	22.2	749	27
Men	270	9.7	333	12
Women	350	12.5	416	15
Between 8-16	585	21.0	583	21
Between 0-7	520	18.6	433	16

Table 3: Content analysis of family members (%).

purchase. Because of limited assortment of goods offer, manufacturers are not able to meet an increasing insistent demand of consumer's, therefore their share in market still remains small compared to competitor (women 10% and 22%, men 25% and 41%, respectively). The youth group mainly consists of students, which is an important aspect of creating a demand. The difference of the segment is that there is huge impact of fashion and type of job. During certain years, clothes made in Uzbekistan and Turkey is seizing a market of Chinese producers. Another side that have consider is price and have produced massively.

In the group of student's the boys' apparel mainly consists of uniform and they are popular assortment, therefore China is still taking a leading place. Especially, major percentage of girls' uniforms, sportswear, blouses, cardigan, jumper and sweaters, dressing gowns and dresses is the manufactured in China. Interestingly, Uzbekistan's share in producing children's suits, trousers and shirts increased from 14-24% in two years, between years 2012-2014.

In the group of infant school attenders' the portion of Uzbekistan rose by 6% (from 11% to 17%) during the period. The assortment of children clothes makes the major part of the group and share of China in this sector is decreasing, while that of Turkey, Korea and other countries (Iran, Pakistan) is getting higher. Following group is mainly formed by the choice of parents and unlike other groups; the considerable aspects are comfort in wearing, suitability of sizes and ornaments. Our manufacturers of children's ready-made apparels do not occupied enough place in market. It is noticeable that there is an increasing share of national clothes in the family's wardrobe.

There is a table, which have compiled according to segmentation of

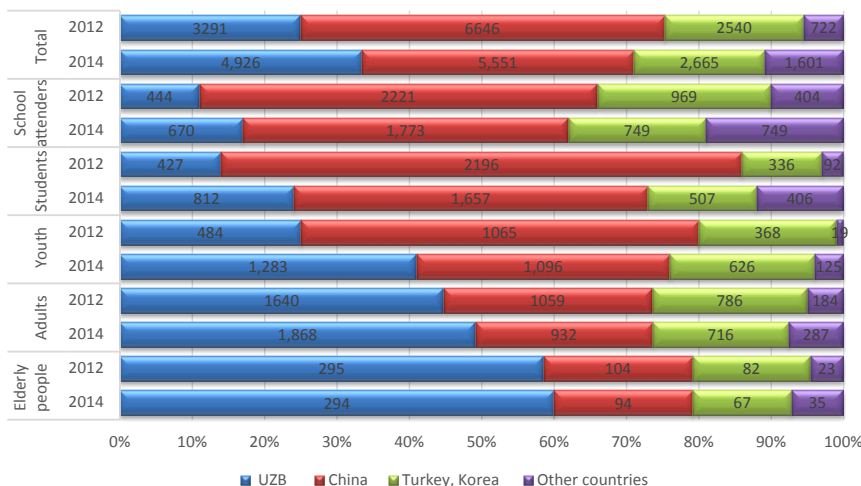


Figure 1: Condition of segment wardrobe of family members.

Age group of family members	Correlation with price	Consideration of quality	Matches for fashion	Impact of type of profession	Hygienic impact	Others	Total
Old-aged (above 60)	***	***	*	0	**	**	11
Elderly (between 31-60)	*	**	***	**	***	***	14
Youth (between 17-30)	***	***	***	*	***	***	16
Students (between 8-16)	0	**	***	***	*	*	10
Children (between 0-7)	0	0	*	0	***		4

***: Strong impact; **: Medium impact; *: Little impact; 0: No impact.

Table 4: Influential factors in shaping family members wardrobe by age groups.

families by age groups considering factors, which affect purchase and changes in assortment content. As is illustrated in the Table 4, the most insistent segment is women aged 17-30 as well as men and women aged 31-60.

One more factor that exerts influence on families' purchase ready-made apparels is social location of families. Dressing culture of family members is formed under the influence of householder and in turn, the factors that impact on assortment related to the education degree and profession. Obviously, the profession, life position determines family culture and range of clothes in the wardrobe is collect in accordance with them. Therefore, it is preferable to into account the type of activity of householder while grouping families. Because Uzbek mentality and oriental traditions are connected with dressing manners and families professions.

Therefore, we in the course of researches, first, have divided families into segments by their trades, and have established scale of purchase of ready-to-wear clothes (Table 5).

In the bought ready-to-wear clothes, during the research period, we have displayed a share of the countries-competitors through matrixes in Figures 2 and 3 by means of it we can estimate them. In the figures, one in all segments of families, the state China, only in families where the head of the family works abroad, and a share of Korea above has a high share. Figure shows matrix of a share of the countries in consumption of ready-to-wear clothes of segments by a trade of families for year 2012-2014.

In 2014 competitors in our internal market tried to get the place of Chinese products, share of Uzbekistan is increase in the account of industrial personnel, businessmen, military-men. In addition, share of products of Turkish and Korean origin has increased among the segment of individual businesspersons and entrepreneurs.

Classification of families	Number of families	Total purchases	
		Year 2012	Year 2014
Teachers	42	1407	1258
Doctors	14	519	649
Clerks of state companies	45	1038	1477
Entrepreneurs	54	1391	1526
Farmers	19	361	628
Dehkans	89	961	1554
Individual labor activity	124	3252	2437
Construction agents	9	563	431
Industrial Clerks	24	793	672
Military clerks	6	420	542
Workers in foreign countries	19	1087	1531
Others	55	2467	3009
	500	14259	15714

Table 5: Classification of families by skill level and trade, their structure by purchases.

The results of Table 6 matrix family group on the head of the domestic the most demanding segment of teachers, businesspersons and builders, respectively. Cloakroom countries share in this segment of the analysis of the percentage of teachers in year 2012, the family wardrobe is 25%, and 32% in 2014, the family of entrepreneurs wardrobe 37%, 42%, in the family of builders wardrobe is 16%, 30% is determined.

Oilier largest share in the structure of the family group, individual work to have been correct, and the share of this group (21% in year 2012 and 32% in year 2014) was low compared to other groups aching. Accordingly, this group formed in accordance with the order of Chinese ready-to-wear range. Farmers and military families' wardrobe China accounted for more than that.

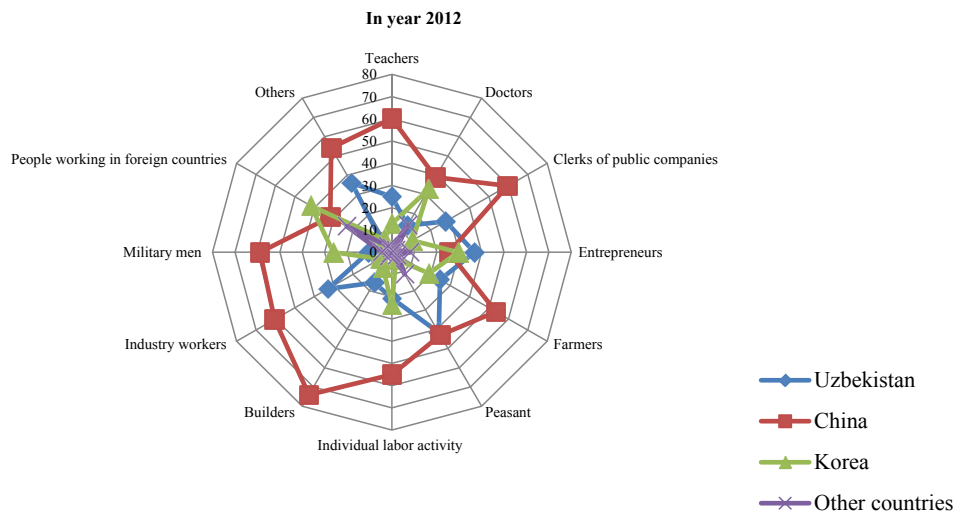


Figure 2: Share of competitors on profession of population.

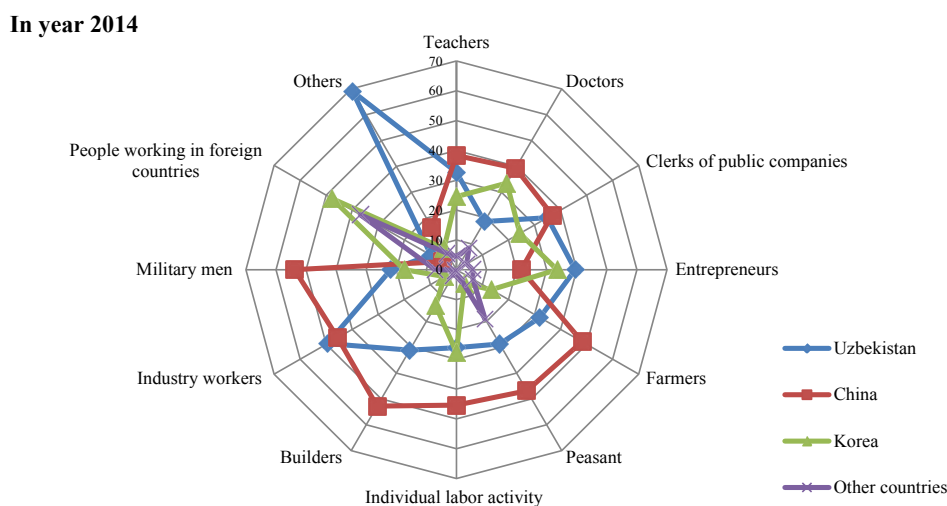


Figure 3: Share of competitors on profession of population.

Segments	Connection price	Quality of	Fashionable compatibility	Impact of business activity	Personal hygiene	Other aspects	Total
Teachers	***	***	***	***	*	**	15
Doctors	***	**	*	*	***	*	11
Employees of state enterprises	*	***	***	***	*	*	12
Businessman	*	***	***	***	***	**	15
Farmers	*	***	*	*	*	*	8
Farmers	***	***	*	**	*	*	11
Individual worker	*	***	*	*	*	***	10
Builders	**	***	*	***	***	*	14
Industrialists	*	***	*	*	*	*	8
Military	*	***	*	*	***	*	9
Harris countries workers	*	***	***	*	*	*	10

***: Powerful effect; **: Secondary effects; *: Less affected; 0: Does not affect.

Table 6: Family members of the domestic segment of the matrix of factors that influence the formation of the wardrobe.

Change in composition of ready-to-wear range of families and their competitive strategies of enterprises through the analysis of countries' share of production range is set to start working on the issue of the

formation of matter. Accordingly, consumer's wardrobe emerging assortment includes the share of domestically produced products. For each segment assortment of wardrobe structure to determine the

Consumer segments	Indirect competition (%)				
	Years	Uzbekistan	China	Turkey	Other
Women's wardrobes	2012	16	45	32	6
	2014	13	38	39	11
Men wardrobes	2012	50	31	14	4
	2014	63	17	8	12
Students wardrobes	2012	16	69	12	3
	2014	34	47	11	9
Goup of infant school attenders' wardrobes	2012	10	56	24	10
	2014	31	25	37	6
Total	2012	20	51	22	6
	2014	32	35	24	9

Table 7: The share of participants in the wardrobe of the consumer segment.

share of the competing countries. Assortment composition in order to further the analysis of children, students, men and women of the segments that purpose.

Consumer's ready-to-wear clothes of defined segments of the market share in the state are reflected in Table 7. According to table results in women's wardrobe the share of those produced in Uzbekistan decreased to 13% in year 2014 against 16% in 2012, and the share of Chinese production decreased to 38% against 45%. The purchase of dress made in Turkey and in other countries has increased.

In the formation of men's wardrobe, it have been achieved to increase the share of Uzbekistan made products grew from 50-63% and has been trying to oust the competitors out of market.

Big changes have made in students' wardrobe as the share of Uzbek made uniform increased from 10-31%. In trainees' wardrobe, Uzbekistan made garment grew almost by 3 times. Research outcomes show that as the result of the strategy of excluding the Chinese goods out of market the share of Uzbekistan made garments increased from 20-32% in year 2012-2014. Ready-made clothes produced in Uzbekistan are competing on an equal footing with Chinese and Turkish products (32%, 35%, 24% respectively). On analyses results base it has been offering to create the strategy of protecting household clothing market of Uzbekistan from competitors.

In order to make easy the analyses of change in the range of consumer purchases and the share of the producing countries appropriate settings have been made in Table 6, A market share matrix have create according to appropriate settings. Considering that the analyses has been made for the end of two years, the changes of procurement structure in this period for each assortment by settings of matrix in table (red (x), yellow (!) and blue (√)) offered the following strategy of managing the assortment. There are possibilities to perform for each garment producing companies' settings suitable for matrix. For each setting the following strategies is performed.

In the appropriate levels of development strategies (the red (x) mark), for the companies offering a range of business strategic objectives took place to find its place and enter in the domestic market. It has been outlined what directions to pay attention to for entering the domestic market.

First stage development strategy is recommended for women's ready-made clothing manufacturing market subjects. In this range, the enterprises operating in market should pay attention to the following in formation of own assortment strategy: widening the technical-economic capacity of company, create new models, to pay more attention to innovations, forming the modernization programs, diversification of product.

Action strategies (yellow (!) mark) suit market subjects working in students and trainees segment market. This strategy has mainly considered pushing out the foreign assortment from domestic market strategy. Accordingly, in the purposes of this strategy it has been paid attention to the use of effective methods of association with consumers. The first stage of this strategy have must is applied for the main assortment of students and children. The main attention is given to aspects of mechanisms for the effective use of marketing communications. It creates the opportunity to increase market share in the competition especially in applying the branding opportunities for students' assortments. Development strategy is aimed to drive imported goods completely out of market and maintain the share of enterprises and will continue to rise in status.

At the same time, the expansion of the range of the assortment of goods as much as possible, diversification, concentration, increase the cost of marketing, raising the fashion design up to international level are considered to be the main factors of development.

Conservation Strategies (blue color (√) mark) levels, respectively, reflects to cover the domestic market with domestic products fully and the sequence of actions aimed to preserve this share and combines criteria of formation criteria of development strategies for foreign markets. Conversation strategy if specific for subjects operating in market with men's ready-to-wear strategy. They must concentrate the main activity of company on maintaining existing customers. Competitiveness should increase the opportunities of access to foreign markets, connection of companies operating in this level of matrix to the single link base and using international marketing strategies effectively.

Conclusion

Enterprises should increase the effectiveness of relation channels with consumers for maintaining the existing market, increasing the advertising costs, bring all producers into single unit base, increase the attractiveness of brand, determine the strategic objectives of development in international markets and use the potential of internal market fully, access the services of international organizations, trading houses, brokerage agencies, international design and fashion, consulting centers, engineering, obtaining international quality certificates, detailed study of foreign markets and spend funds for marketing researches in this regard in organized basis.

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