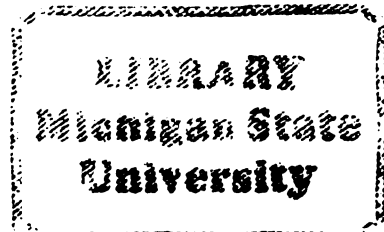


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Imported Versus U.S.-Made Apparel,
and the Buy American Campaign

presented by

Sheila Varga Tolbert

has been accepted towards fulfillment
of the requirements for

Master's of Arts degree in Clothing & Textiles

A handwritten signature in cursive script, appearing to read "Brenda Witter", written over a horizontal line.

Major professor

Brenda Witter

Date May 13, 1975

/ RETAIL BUYERS' PERCEPTIONS OF
IMPORTED VERSUS U.S.-MADE APPAREL,
AND THE BUY AMERICAN CAMPAIGN /

By

Sheila Varga Tolbert

//

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Submitted to
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ABSTRACT

RETAIL BUYERS' PERCEPTIONS OF IMPORTED VERSUS U.S.-MADE APPAREL, AND THE BUY AMERICAN CAMPAIGN

By
Sheila Varga Tolbert

The purpose of this study was to investigate retail buyers' perceptions about imported versus domestic apparel, reasons for purchasing imported apparel, and perceptions of the "Buy American" campaign.

Survey methodology was used to obtain data from apparel retail buyers. The sample of 482 buyers was selected from three directories: The 1984 Directory of Department Stores, Directory of Discount Department Stores, and Women's and Children's Wear Buyers. Sixty-nine usable questionnaires were returned.

Statistically significant findings were the basis for rejecting three null hypotheses. Salary was found to be inversely related to buyers' willingness to promote the "Buy American" campaign if materials were available. Age was found to be directly related to buyers current promotion of "Buy American." In general, the retail buyers in this sample did not promote and were not willing to begin promoting the "Buy American" campaign. Additionally, significant differences were found among specialty, department, and discount store buyers on two reasons for purchasing imports: (1) higher mark-up potential, and (2) exclusive merchandise/private branding.

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Date

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CHAPTER I

INTRODUCTION

As retailers are confronted with increased competition they have accelerated their purchases of imported apparel. And as the proportion of imported versus domestically produced apparel has grown, domestic manufacturers have competed with foreign suppliers for retailers' dollars. Additionally, investigations of domestic manufacturers' perceptions of rising imports have found that domestic manufacturers perceive imports to have an adverse affect on their businesses (Chaikin, 1984; Daniels, 1978, 1983; Seidel, September 1983; Staff, Textile Industries, 1980; U.S. House of Representatives, 1977).

Statement of the Problem

In response to the rapid growth of apparel imports, legislation has been proposed that would result in the restriction of apparel imports, and domestic manufacturers have launched an extensive "Buy American" campaign. Discrepancies exist among advocates of increased protection (domestic apparel manufacturers) and advocates of free trade (domestic retailers). In contrast to the indepth investigation and documentation of domestic apparel manufacturers' perceptions of the situation, domestic apparel retailers' perceptions of the situation have not been investigated. Although general merchandise managers also influence

the type of merchandise purchased for a retail store, their involvement is less direct than buyers. Therefore, an analysis of retail buyers' perceptions of apparel imports versus domestically made apparel, and the "Buy American" campaign is essential to assist legislators, retailers, marketers, and manufacturers to gain a broader understanding of the role of imported apparel in the United States.

Justification

The only large scale review of attitudes about import policy over the past four years was based on testimonials from textile and apparel manufacturing industries and labor union representatives (Barovick, 1983). Results from that study supported the contention that retailers take higher mark-ups on imported merchandise, thereby passing on less of a potential price benefit to the ultimate consumer (U.S. House of Representatives, 1977).

Although that study was extensive, retailers' perceptions of the situation were not considered. Perhaps retailers take higher mark-ups on imported merchandise to compensate for their perceived greater risk associated with purchasing imports.

Evidence exists of differential pricing and mark-up practices among retailer types of imported merchandise (Cline, 1979). Differences among retailer types are suspected to exist due to the differential nature of specialty, department, and discount stores. Specialty stores have characteristically emphasized unique merchandise and private labeling, and are most likely to utilize specification buying and exclusive purchasing arrangements. Department stores have characteristically emphasized manufacturers' brands. Discount stores

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have characteristically emphasized low prices and imported merchandise. The risk of purchasing apparel imports may also be concentrated within specific retailer types (specialty, department, discount).

The impact of the "Buy American" campaign on retailers is an important factor in the development of domestic apparel manufacturers' marketing strategies and domestic retailers' purchasing and merchandising strategies. Specifically, retail buyers are the link between apparel manufacturers and apparel consumers. Retail buyers, acting as gatekeepers, have control over the amount of American-made apparel available to consumers. Therefore, retail buyers' perceptions of the "Buy American" campaign will have a direct effect on the future direction of the domestic apparel manufacturing industry.

If additional barriers to imported products are implemented, certain reactions could be expected. It would be likely that trading partners of the United States would enact retaliating barriers to our exports. The United States would likely produce dislocations in their trading partners' economies. And lastly, (by inference) it would be likely that domestic consumers would protest the resulting higher prices (Garcia, Ross, Padberg, 1982).

Research Objectives

The purpose of this study was to investigate retail buyers' perceptions of quality, purchasing risk, and handled risk associated with imported versus domestic apparel, reasons for purchasing imported apparel, and perceptions of the "Buy American" campaign. The research objectives for this study included: (1) investigate cues associated with imported apparel as compared to U.S.-made apparel, (2) investigate

retail buyers' perceptions of the Buy American campaign, (3) investigate retail buyers' reasons for purchasing imported apparel.

Conceptual Model

A serious issue facing retailers is that of consumer discontent arising from poor product performance (Day, 1977); therefore retailers' perceptions of perceived purchasing risk is important. Bauer defines perceived risk as unanticipated consequences (financial, psycho-social, product performance) of consumer actions which cannot be approximated with certainty (Kassarjian & Robertson, 1968).

Risk can be defined via perceived purchasing risk, inherent risk, and handled risk. Perceived purchasing risk, for purposes of this study, is a combination of Buyer Variables and Product/Purchasing Variables. Perceived Purchasing Risk represents buyers' perceptions of the presence or absence of intrinsic and extrinsic risk related attributes. Buyer Variables include: demographic variables, age, education, salary, position experience, and quality perception ability.

Inherent risk is that which is indigenous to the Product/Purchasing Variables; being the same for all buyers. Product/Purchasing Variables can be classified as intrinsic and extrinsic risk related attributes. Intrinsic risk related attributes are those which cannot be changed without physically changing the product's characteristics (flaws, sizings, quality, uniqueness, exclusiveness). Extrinsic risk related attributes are product related, but not actually part of the physical product (ex. origin of manufacturer, store type, purchasing red tape, consumer returns).

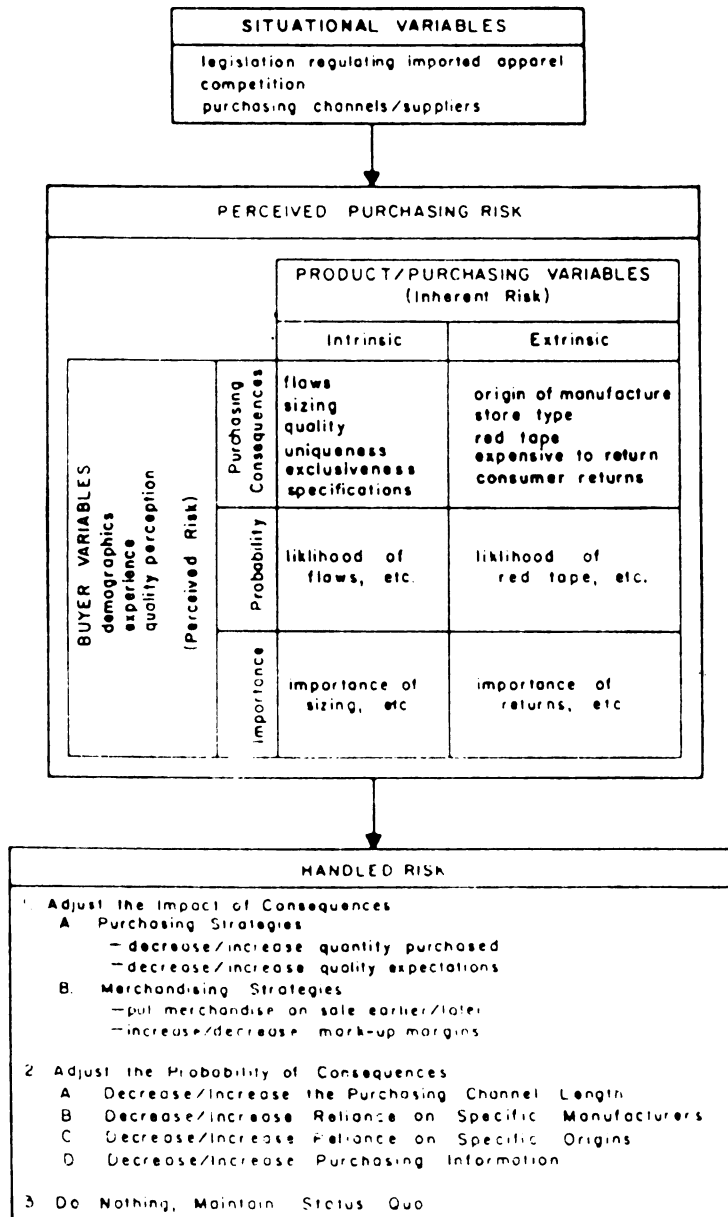
Handled risk is defined as being any action (or inaction) the buyer takes to increase, decrease, or maintain his/her certainty of an outcome. Generally, purchasers seek to reduce perceived risk in a purchasing situation (Bauer, 1960). Total perceived risk can be reduced via reducing possible adverse consequences or increasing the certainty of the purchase outcome. A buyer can reduce possible adverse consequences by purchasing smaller quantities from suppliers and countries with which a high level of perceived risk is associated, put merchandise associated with high purchasing risk on sale earlier, or take higher mark-ups on merchandise associated with high purchasing risk.

Risk can be reduced by increasing the probability of an outcome through information acquisition, information processing, or information retention (Robertson, 1970).

A conceptual model upon which an evaluation of buyers' handled risk can be made is presented in Figure 1.1. It is a modification of Eroglu's (1984) framework of cue impact on quality perceptions (Figure 1.2 in Appendix A). Eroglu's model enabled the development of the conceptual model for this study by providing a basis for analyzing quality perceptions which is one component of perceived purchasing risk and handled risk.

Figure 1.1

A FRAMEWORK OF CUE IMPACT ON
PERCEIVED PURCHASING RISK AND HANDLED RISK
OF APPAREL RETAIL BUYERS



CHAPTER II

REVIEW OF LITERATURE

Using the model illustrated in Figure 1.1 as a structural basis, the following review of relevant literature to this investigation has five dimensions: Situational Variables, Apparel Product/Purchasing Variables, Apparel Buyer Variables, Perceived Purchasing Risk, and Handled Risk.

Situational Variables

The situational variables include: The Retail Situation, The Impact of Imported Apparel on the Domestic Manufacturing Industry, Domestic Manufacturers' Response to Imports, and The Impact of Legislation Restricting Trade.

The Retail Situation

Competition among retailers has been increasing. Consumers' expenditures for apparel products (as a percentage of total personal consumption) have declined from 8.69% in 1982 to 8.63% in 1983 (1972 is listed as a base year) (U.S.D.C., Bureau of Economic Analysis, June 1984, 11). Apparel retailers have had to compete for a declining portion of the consumer market. In addition, increased demand for specific segments of men's and women's apparel (corduroy and natural fibers,

outdoor and recreation wear, and women's dresses and investment clothing) has intensified competition among retailers (Staff, Textile Industries, 1980).

Growth of imported apparel into the United States has been dramatic. In 1974, 21.7% of domestic apparel consumption was imported; this grew to 41.6% in 1982 (Daniels, 1983). The percentage of imports into the United States market is expected to increase as the domestic dollar remains strong in comparison to the United States' trading partners. A relatively strong dollar increases domestic purchasing power of imports and encourages foreign suppliers to direct a larger number of and/or more expensive products toward the United States.

Within this aura of intense competition, retailers are well advised to strategically purchase and market their merchandise. Often, the ultimate strategy includes cost and non-cost product factors. The purchasing and merchandising of apparel imports has increased the availability of less expensive merchandise. Cline (1979) found that 57% of apparel imports from Europe, Japan, and Canada; and 73% of apparel imports from Latin America and Asia, had lower prices than domestic apparel. The presence of imports also increased the available total supply. This indirectly keeps prices low, assuming demand remains relatively stable, as a low equilibrium point between supply and demand is maintained (Cline, 1979). Additionally, foreign manufacturers have a cost incentive to market their goods to the United States; the cost incentive is the effectiveness of targeting advertisements and promotion to a large middle class (Garcia, et al., 1982). The availability of a large target market provides a more cost effec-

tive means for marketing a product than marketing a single product to more diverse markets which are found in other countries.

Non-cost competitive strategies for retailers include variety or uniqueness of merchandise offerings; which was found to be an important factor in consumer purchasing (Claxton & Ritchie, 1979). It is also suggested that consumers in the domestic market are accustomed to using a wide variety of products (Garcia, et al., 1982). Both of these cost and non-cost strategic factors can be maximized via purchasing imported apparel.

The Impact of Imported Apparel on the Domestic Manufacturing Industry

Rapid increases in the level of textile and apparel imports have had an adverse impact of domestic textile and apparel manufacturers. Apparel and textile manufacturers were experiencing a 15 to 19% unemployment rate in 1982 (Dickerson, 1983) as compared to an 8.3% annual average unemployment rate for all manufacturing industries (U.S. Department of Labor, September 1982).

Domestic manufacturers were having a difficult time competing with imports based on cost. Approximately one third of the cost of a garment manufactured in the United States consists of wages and salaries. This is significant if one considers the existing wage differential between domestic apparel manufacturing employees and foreign apparel manufacturing employees: in China the difference is \$5.84 (\$6.00 per hour in the United States as compared to \$0.16 an hour). In addition domestic apparel wages are unlikely to be reduced due to the fact that they are already comparatively lower than the average hourly wage (\$9.00) for all domestic manufacturing (Chaikin, 1984).

Domestic Manufacturers' Response to Imports

The domestic textile and apparel manufacturing industry and labor unions have taken two major steps of action. They have put "intense pressure" on legislators to take restrictive action against imports (Barovick, 1983). And secondly, they have launched a "Buy American" campaign promoting domestically made merchandise.

The second action taken by the domestic textile and apparel manufacturers, the "Buy American" campaign, has been directed at different sectors of the domestic distribution system; retailers as well as consumers. It is one of the few advertising campaigns of this nature in the apparel industry. One campaign, extending from 1976 - 1980, was launched by the domestic apparel unions who promoted the boycott of J.P. Stevens and their products (Douglas, 1983).

The Impact of Legislation Restricting Trade

Currently the MultiFiber Arrangement (MFA) is the primary governing legislation of textile and apparel trade. It was enacted in 1974 to control world trade in cotton, wool, and man-made fiber textiles and apparel. The MFA had more lenient trading terms than the preceding Short Term Cotton Textile Arrangement (STA) or the Long Term Cotton Textile Arrangement (LTA). The MFA allowed for a 6% annual growth rate of imports, and for exporting countries to increase shipments beyond quota levels in a given year by utilizing regulations that allow for carry-over (Keh, 1978; Daniels, 1978). Refer to Appendix B for an historical review of apparel import restrictions.

Another piece of legislation which specifically regulates imported apparel is Section 503(c) of the Trade Act of 1974. It defined import

sensitive products as those "textile and apparel articles which are subject to textile agreements". It stated that import sensitive items shall be denied being designated by the 'Generalized System of Preference' (Daniels, 1983). Apparel classifications that were import sensitive in 1982 include: men's and boy's shirts, sweaters, coats, and jackets; women's and girl's sweaters, coats, and jackets; infant's shirts and blouses. Imports are expected to increase in market share for several non-standardized apparel classifications (Seidel, April 1983).

Several bilateral agreements have recently been enacted. In the first nine months of 1983, the United States directed an all out assault on apparel imports from Far Eastern countries, placing 62 categorical restraints on imports, and 21 embargoes on apparel imports from the Far East, affecting \$750 million dollars in consumer sales of U.S. trade (Lanier, December 1983). Most recently, foreign sources are restricted from shipping apparel assembled from pieces made elsewhere, under their own quotas to the U.S., and limiting imports from China, Taiwan, and Hong Kong (Wall Street Journal, September 13, 1984).

Currently, two important pieces of legislation regarding imported apparel have been proposed: Item 809 of the Tariff Schedule of the United States (TSUS), and a bill from the Committee on Ways and Means. Item 809 succeeds Item 807 which stated that duty will be charged only on the value added to garments produced "off-shore" with the requirement that fabric be cut domestically before being shipped abroad for assembly. Item 809 differs from Item 807 in that it does not require apparel to be cut domestically prior to being manufactured in a foreign country (Seidel, September 1983). Both Items 807 and 809 require the

textile fabric to be purchased domestically. Therefore, domestic textile manufacturers are likely to be direct beneficiaries, and domestic cutters are likely to be adversely affected with Item 809. Additionally, apparel manufacturers would have more control over the variety of merchandise imported (as import quotas are likely to be filled quicker) and offered to the consumer.

The second piece of legislation is a bill proposed by the Committee on Ways and Means. It includes a section covering imports from non-market countries (countries not currently covered by domestic legislation) who sell imports. It is designed to restrict imports that are sold in the United States of comparable quality and which cause "material injury" to domestic apparel manufacturers (Barovick, 1983). This would likely counteract the anti-inflationary impact of imports and total costs would increase. Domestic manufacturers would be direct beneficiaries. Domestic retailers would be adversely impacted from this bill because they would be restricted from practicing a common strategy of locating and marketing the least costly merchandise of a desired quality.

Theoretically, the situational variables are givens, and serve as an umbrella of influence over the entire model. The next two dimensions to be discussed, the Apparel Product/Purchasing Variables and the Apparel Buyer Variables, directly influence the buyers' perception of cues and hence purchasing risk.

Apparel Product/Purchasing Variables

Retail buyers' perceptions of Apparel Product/Purchasing Variables have been essentially unexplored; therefore, more general studies

related to consumer perceptions of apparel product and purchasing variables are discussed. The Product/Purchasing Variables reviewed include: product origin (domestic versus imported), and product destination (store type - specialty, department, discount).

Dickerson conducted a telephone survey of 1,350 consumers covering 32 states (1982). The findings indicated that imported apparel is bought by 89.4% of adults. Additionally, 65.2% of consumers reported they noticed the source of origin for a product. And 29.8% of respondents indicated that imports are of better or equal quality to domestic merchandise, while 47.3% of respondents indicated that domestics are of better quality than imports.

Cline (1979) conducted a survey of consumer prices among retail types; department, specialty, chain, and discount stores. The findings indicate that prices differed among retail types. Using chain stores as a base, department stores were found to be 48% higher (and specialty stores were found to be 22% higher priced) than chains; and discount stores were found to be 40% lower priced than chains.

Perceptions of a product are determined from intrinsic and extrinsic product cues. Although many studies have investigated the relative influence of intrinsic and extrinsic cues on a wide range of products, a generalization for apparel products has not been developed.

In several studies the influence of price on perceived quality was investigated. Some found price to be a secondary factor (Wheatley, Chiu, Goldman, 1981; Shapiro, 1973). A study of carpeting by Wheatley, Chiu, & Goldman (1981) found that intrinsic product quality was more important than price in perception of product quality. However, price changes appeared to be more easily perceived by consumers than changes

in physical quality. The authors suggest that within particular ranges of product quality dimensions consumers use specific intrinsic and extrinsic cues, because "as the level of the physical quality cue rises consumers' ability to discriminate becomes more limited" (Wheatley, Chiu, Goldman, Summer 1981, p. 100).

In another study, Shapiro (1973) found price to be a weak communicator of quality. Using sweater products, 60% of respondents considered the higher priced sweater of less or equal quality to the lower priced sweater.

Another investigation found price to be an important determinant of product quality when no other product cues were present (McConnell, 1968). The importance of price as a cue to quality perceptions may be overstated in this study as other cues are usually present in actual buying situations.

Another intervening factor may be that price, as an influence on perceived quality, is product specific. Determining the extent to which consumers discriminate among different levels of quality for given product lines is strategically sound information for retailers to use in planning their marketing mix (Britt, 1975). Price was found to influence perceived quality for toothpaste and shirts, but not suits (Gardner, 1970). A suggested explanation is that price is used as a cue when there is no brand differentiation within a product category. Contrary to that suggestion, French, Williams, and Chance (1972) found that a high priced brand is preferred when a product category included a wide range of perceived quality differentials.

Store type is another extrinsic cue investigated. Gardner (1970) found that the association between store types and price ranges

is product specific. He found a strong association for the product category of shirts, but not suits.

Realistically, many cues influence consumers' perception of product quality. Therefore, multi-cues and interaction among them must be considered. Jacoby, Olson, and Haddock (1971) suggest that: "the variables that affect quality perception seem to manifest themselves primarily through interaction with other variables".

Stafford and Enis (1969) investigated the effects of multi-cues on perceived quality of carpeting. Of the two cues considered, price and store name; price was found to be more influential. A suggested limitation of this study was the selection of the sample: the subjects were classroom students who may not have been familiar with store names used, and therefore did not associate quality cues with those stores.

An extension of Stafford & Enis' study investigated the influence of price, prestige of store, and color on housewives' perceptions of carpeting quality (Wheatley & Chiu, 1977). The findings suggested that the price cue is most important, then prestige of store, followed by color.

Apparel Buyer Variables

As previously discussed, findings about apparel buyer variables are based on ultimate consumers rather than retail buyers. The Buyer Variables reviewed include: demographic variables (age, education, income) and perception of quality differential variables.

Age was found to be positively related to reliance on the price information cue for perceived quality of carpeting (Shapiro, 1973). In addition, Dickerson (1982) developed a profile of consumers which

depicted the youngest and the oldest consumers as being the least concerned with the import issue.

Education was found to be inversely related to reliance on the price information cue for perceived quality of carpeting (Shapiro, 1973). This indicates that consumers who have completed higher levels of education rely less on price cues to determine quality than consumers who have less formal education.

Income was found to have differing impacts in studies. Conclusions of Dickerson's consumer survey (1982) indicate that the highest and the lowest income groups are least concerned with the import issue. Shapiro (1973) and Venkataraman (1981) found no relationship between income and price reliance. While others have found that income is an influential factor on perceptions of quality (Wheatley, Chiu, 1977; Holton, 1969; French, Williams, Chance, 1972).

Wheatley and Chiu (1977) found that income had an inverse relationship with mean quality perception levels of carpeting. The high income level consumers perceived product quality to be lower than the low income consumers.

Findings from an investigation by French et al. (1972) suggested that income level is directly related to use of price as a cue to quality when there is a highly perceived quality difference among brands; high income consumers use price as a cue to quality when there is a perceived wide range of differentiated merchandise. In addition, Holton (1969) suggested that income is inversely related to making price-quality comparisons of lower priced goods; the higher income consumers made fewer price-quality comparisons for low priced shopping goods.

Perceived Purchasing Risk and Handled Risk

Cline (1979) speculated that higher product risk is associated with purchasing abroad because of no return options, additional travel and research costs, and the uncertainty of product quality. Retailers may try to alleviate some of this risk in different ways. Cline suggested that taking higher mark-ups on imports versus domestic goods may be one risk coping mechanism. In addition, retailers may practice different merchandising strategies for imported as compared to domestically made apparel. Retailers may mark imports down quicker at the end of seasons, take larger mark-downs on imported versus domestically made merchandise, or offer a wide or unique merchandise selection of both domestic and imported merchandise.

A comparison of the average mark-up among different types of retailers would add to a richer understanding of retailers' risk coping mechanisms. The most current data available that address this issue were provided by the National Retail Merchants Association (1983). In 1982, department stores were found to have an average mark-up of 48.21%, while specialty stores have an average mark-up of 50.62%. Comparable operating data for discount stores were not available. As substantial differences are evident among specialty, department, and discount stores, it is likely that the use of higher mark-up margins on imported apparel to reduce perceived purchasing risk, differs among retail buyer type as well.

Consumers have been found to reduce their purchasing risk in several ways. Roselius (1971) presented consumer rankings of risk reduction mechanisms; consumers were given high risk buying situations in which no specific prices or purchasing methods were used. Brand

loyalty and reliance on major brand images are the most utilized risk reduction mechanisms. Shopping in person and purchasing experience were found to reduce consumer risk. The least used risk reduction mechanisms were endorsements and guarantees. Consumers also used price cues or store reputation to reduce purchasing risk (Bauer, 1960). Consumers acted to reduce risk via purchasing less expensive merchandise or merchandise not subject to reference group influence (Gardner, 1970).

CHAPTER III

METHODS AND PROCEDURES

This chapter is divided into two sections: (1) the questionnaire, hypotheses, and statistical analyses, and (2) the sample selection.

The Questionnaire, Hypotheses, and Statistical Analyses

The questionnaire was developed to fulfill three objectives. Each objective will be discussed in terms of related questionnaire information, hypotheses, and statistical testing procedures. A copy of the questionnaire is in Appendix C.

Objective One

To investigate cues associated with imported apparel as compared to U.S.-made apparel.

Data measuring buyers' perceptions of domestic versus imported apparel were obtained through a series of statements (questions 1-17); respondents were asked to indicate their level of agreement on a seven point scale from strongly disagree (1) to strongly agree (7). The dimensions associated with purchasing imported apparel included: perceptions of merchandise flaws, appropriateness of sizes of imported merchandise, consumer returns of merchandise, quality of apparel merchandise for a given price, manufacturers' quality control, risk associated with buying imports, putting imported versus domestic

merchandise on sale, changes in purchasing volume of imports, mark-up margins on imports versus domestics, reliance on brands or manufacturers, and awareness of consumers' use of the 'country of origin' cue.

The questionnaires were precoded which enabled identification of store type: specialty, department, discount. Buyer demographic information of position experience was obtained through question 31; age was obtained through question 33; education was obtained through question 35; and salary was obtained through question 37.

The hypotheses related to the first objective are:

- H1.1: No significant differences exist among buyers' perceptions of cues associated with imported versus domestic apparel; by retail buyer type: specialty, department, and discount stores.
- H1.2: No significant differences exist among buyers' perceptions of cues associated with imported versus domestic apparel; by retail buyer type, after adjusting for demographic variables (position experience, education, salary).

The statistical test for the first hypothesis was an analysis of variance. The dependent variables were the risk typologies, and the independent variables were specialty, department, and discount store types.

Hypothesis 1.2 was analyzed through an analysis of covariance. The dependent variables were the risk typologies, and the independent variables were specialty, department, and discount store types. The covariates are the demographic variables.

Objective Two

To investigate retail buyers' perceptions of the "Buy American" campaign.

Data measuring retail buyer perceptions of the Buy American campaign were obtained through a second series of statements (questions 18-25); respondents were asked to indicate their level of agreement on a seven point scale from strongly disagree (1) to strongly agree (7).

This dimension included statements regarding current use of or willingness to use "Buy American" in advertisements, hangtags and labels on merchandise, point of purchase display materials; and the Buy American campaign's influence on their apparel origin purchasing decisions.

Information about buyer demographics and retailer type was obtained from the questionnaire as previously discussed.

The hypotheses related to the second objective are:

- H2.1: No significant differences exist among buyers' perceptions of the "Buy American" campaign by retail buyer type: specialty, department, and discount stores.
- H2.2: No significant differences exist among buyers' perceptions of the "Buy American" campaign by retail buyer type after adjusting for demographic variables (age, education, salary).

The statistical test for Hypothesis 2.1 was an analysis of variance. The dependent variables were the Buy American typologies, and the independent variables were the store types. An analysis of covariance was conducted to evaluate Hypothesis 2.2. The dependent and independent variables are the same as those in H2.1. The covariates are the demographic variables.

Objective Three

To investigate retail buyers' reasons for purchasing imported apparel.

Data measuring retail buyers' reasons for purchasing imports were obtained through question 40. Possible reasons included: better quality for the price, unique merchandise, higher mark-up margins, private branding merchandise, specification buying, or respondents could specify a different reason. Respondents were asked to allocate 100 points among those reasons. Information about retailer types and buyer demographics was obtained as previously discussed.

The hypotheses related to the third objective are:

- H3.1: No significant differences exist among buyers' reasons for purchasing imported apparel by retail buyer type: specialty, department, discount stores.
- H3.2: No significant differences exist among buyers' reasons for purchasing imported apparel by retail buyer type after adjusting for demographic variables (age, education, salary).

An analysis of variance was used to test Hypothesis 3.1. The reasons for purchasing imported apparel were the dependent variables, and the retailer types were the independent variables.

An analysis of covariance was conducted to evaluate Hypothesis 3.2. The dependent and independent variables are the same as those in H3.1. The covariates are the demographic variables.

Sample Selection

A random numbers table was used to select 100 specialty stores, 100 department stores, and 100 discount stores located in the United States. The specialty, department, and discount stores were selected from the most current listing of three directories: Women's and Children's Wear Buyers (1983), The 1984 Directory of Department Stores, Directory of Discount Department Stores (1980).

Within the selected stores, a buyer of men's sportswear and women's sportswear was selected. If a store's designated line of responsibility was narrower, and did not allow a break down into men's and women's sportswear, the position which designated that responsibility was selected. If a store's designated line of responsibility was broader than men's and women's sportswear, buyers of the most appropriate apparel classifications were selected. To avoid repetitive sampling of the same buyer, who may buy for more than one store, the

retail buyers were randomly sampled, and if previously selected for the sample, they were not added to the sample a second time.

The questionnaire was initially mailed with a cover letter to the selected 482 buyers on July 31, 1984. The cover letter explained the purpose of the study; to assimilate information of retailers' perceptions of imports and the "Buy American" campaign. Retail buyers were assured of complete confidentiality. The cover letter requested that the questionnaire be returned by August 20, 1984. The initial mailing yielded a 11.97% response rate (all 'return to sender' letters were not included in the response rate); therefore, a follow-up mailing was initiated.

Questionnaires 'returned to sender' because of an unforwardable address, were checked in current phone book listings for changes of address, and were then re-mailed with the position title and store name addressed; buyers' names were omitted. Questionnaires 'returned to sender' a second time or designated as 'out-of-business' were dropped from the sample.

The questionnaires were pre-coded so that non-respondents of the sample could be re-contacted. The follow-up consisted of a cover letter and a post-card. The follow-up cover letter re-explained the purpose of the study, and emphasized the importance of participation. Subjects were reassured of their confidentiality and that results would only be reported in the aggregate. The enclosed post-card provided a means for the subject to indicate if they needed another questionnaire, or if they refused to participate in this survey.

The final sample population size accounted for 69 questionnaires from a possible 448 that were sent and not returned: yielding a 15.4%

response rate. Due to the use of directories to select the sample, the actual response rate may be underestimated because it is unknown if the non-return to sender cover letters, questionnaires, and post-cards were read by actual buyers.

CHAPTER IV

THE SAMPLE, RESULTS, AND DISCUSSION

The Sample

The demographic information was first analyzed to describe the sample population of retail buyers. The demographic variables (age, education, position experience, retail experience, salary, and sex) were examined as single entities, and across retailer types (specialty, department, discount stores). This information is presented in Table 4.1.

Age

The majority of respondents (82.1%) were concentrated in the 31-55 years of age range, although the sample included buyers ranging from 22 to 69 years of age. Specialty store buyers tended to be older; 43.8% of respondents indicated they were older than 50 years. The majority of department store buyers (56.3%) were in the 31 to 40 year range. The ages of discount store buyers tended to be well dispersed throughout the 20-55 year range.

Education

Respondents were asked to indicate the highest level of education achieved based on the 8 classification levels used by the United States

Table 4.1 – Sample Demographic Data

Variables		Specialty n=18 %100	Department n=32 %100	Discount n=19 %100	Total Sample n=69 %100
Age					
	20 - 25	1 6.3	-	2 10.5	3 4.5
	26 - 30	-	1 3.1	2 10.5	3 4.5
	31 - 35	2 12.5	8 25.0	3 15.8	13 19.4
	36 - 40	2 12.5	10 31.3	3 15.8	15 22.4
	41 - 45	1 6.3	6 18.8	3 15.8	10 14.9
	46 - 50	3 18.8	1 3.1	2 10.5	6 9.0
	51 - 55	1 6.3	6 18.8	4 21.1	11 16.4
	56 and Over	6 37.5	-	-	6 9.0
Total		16 100.0	32 100.0	19 100.0	67 100.0
No Response		2	0	0	2
Education					
	Some Elementary School	-	-	-	-
	Completed Elementary School	-	-	-	-
	2 Years of High School	1 5.9	-	-	1 1.5
	Completed High School	5 24.9	4 12.5	3 15.8	12 17.6
	2 Years of College	2 11.8	9 28.1	4 21.1	15 22.1
	Completed College (4 year degree)	7 41.2	15 46.9	8 42.1	30 44.1
	Some Graduate Work (Master's or Professional degree)	2 11.8	1 3.1	2 10.5	5 7.4
	Completed Graduate Program	-	3 9.4	2 10.5	5 7.4
Total		17 100.0	32 100.0	19 100.0	68 100.0
No Response		1	0	0	1

Table 4.1 (cont'd.)

Variables	Specialty n=18 %100	Department n=32 %100	Discount n=19 %100	Total Sample n=69 %100
Position Experience				
1 - 5 Years	6	16	7	24
6 - 10 Years	3	7	6	16
11 - 15 Years	2	4	3	9
16 - 20 Years	2	3	1	6
21 - 25 Years	1	2	2	5
26 and Over	3	-	-	3
	35.3	50.0	36.8	42.6
	17.6	21.9	31.6	23.5
	11.8	12.5	15.8	13.2
	11.8	9.4	5.3	8.8
	5.9	6.3	10.5	7.4
	17.6	-	-	4.4
Total	17	32	19	68
No Response	1	0	0	1
Retail Experience				
1 - 5 Years	4	6	8	18
6 - 10 Years	2	10	6	18
11 - 15 Years	3	9	2	14
16 - 20 Years	-	2	1	3
21 - 25 Years	1	1	1	3
26 - 30 Years	1	-	-	1
	36.4	21.4	44.4	31.6
	18.2	35.7	33.3	31.6
	27.3	32.1	11.1	24.6
	-	7.1	5.6	5.3
	9.1	3.6	5.6	5.3
	9.1	-	-	1.8
Total	11	28	18	57
No Response	7	4	1	12

Table 4.1 (cont'd.)

Variables	Specialty n=18 %100	Department n=32 %100	Discount n=19 %100	Total Sample n=69 %100
Salary	-	-	-	-
Under \$10,000	1	2	-	3
\$10,001 - \$20,000	5	6	3	14
\$20,001 - \$30,000	3	5	4	12
\$30,001 - \$40,000	1	4	4	9
\$40,001 - \$50,000	1	4	4	9
\$50,001 - \$60,000	-	2	1	3
\$60,001 - \$70,000	-	2	1	3
\$70,001 - \$80,000	-	2	-	2
\$80,001 - \$90,000	1	1	1	3
\$90,001 and Over	-	-	-	-
Total	12	28	18	58
No Response	6	4	1	11

Sex				
Male	8	23	18	49
Female	9	9	1	19
Total	17	32	19	68
No Response	1	0	0	1

Census Bureau. The largest percentage of respondents (44.1%) indicated their highest level of education completed was a 4 year college degree. Additionally, 7.4% of respondents had undertaken some graduate education, while 7.4% had completed a graduate program of at least a Master's level. Specialty store buyers tended to have completed the least formal education with 42.6% having completed 2 years of college or less, followed by department store buyers (40.6%), and discount store buyers (36.9%).

Retail Experience

The majority of respondents (87.8%) indicated they had 15 or less years of retail experience. Discount store buyers had the greatest concentration in the lowest range; 77.7% in the 1-10 years of retail experience range. The percentage of buyers who had 16 or more years of experience was greatest for specialty store buyers (18.2%), followed by discount store buyers (11.2%) and department store buyers (10.7%).

Position Experience

Overall, the majority of respondents (79.3%) indicated 15 or less years of position experience. Over 42% of all buyers had 5 or less years of position experience. The specialty store buyers had the highest levels of experience; 35.3% had 16 or more years of position experience. A smaller percentage of department store buyers (15.7%) and discount store buyers (15.8%) had 16 or more years of position experience as compared to specialty store buyers, and were comparatively equal to each other.

A greater percentage of the sample indicated less retail experience than position experience. This is probably due to the large number of subjects who did not respond to the question about retail experience. It is likely that some respondents who indicated 15 or less years of retail experience may have not responded to the position experience dimension. This situation would distort the actual percentage of buyers who had 15 or less years of position experience.

Salary

Respondents were asked to indicate their gross salary (before taxes) based on 12 levels as defined by the United States Census Bureau. The 12 levels were condensed into 10 levels (Table 4.2) to minimize blank cells in the \$100,001 to \$110,000, \$110,001 to \$120,000, and the over \$120,000 ranges. Over seventy-five percent of the buyers earned between \$20,001 and \$60,000. The largest percentage of buyers (24.1%) indicated their gross salary was between \$20,001 and \$30,000. Specialty and department store buyers were concentrated in the \$20,001 to \$40,000 range, while discount store buyers were dispersed throughout the \$20,001 to \$60,000 range.

Sex

The majority of respondents (72.1%) were males. Of the specialty store respondents, males and females were approximately equally distributed with slightly more females (52.9%). The majority of department store buyers (71.9%) and discount store buyers (94.7%) were male.

Table 4.2 - Risk/Quality Dimensions: Retail Buyer Type Group Means

N=68				
Dimension	Specialty	Department	Discount	Overall
Imported merchandise is more likely to have flaws than domestic apparel.	3.2	3.1	2.2	2.9
If there is something wrong with imported merchandise it is too expensive to return it, so we just absorb the losses.	4.4	4.8	3.9	4.5
There is a lot of red tape to go through before buying imported merchandise.	3.1	3.4	3.4	3.3
We buy our imported merchandise through a wholesaler rather than buy direct.	5.4	4.4	3.3	4.4
The sizing for imported merchandise does not really correspond with U.S. sizing.	3.6	2.9	1.5	2.7
We have more returns of imported merchandise than we do of U.S. apparel.	2.6	2.8	1.9	2.6
We generally have to put imported merchandise on sale earlier than we do U.S. apparel.	2.5	3.1	2.0	2.6
Imported merchandise is generally higher quality for the price than domestic merchandise.	5.5	5.5	5.5	5.5
Quality control is not as good for imported merchandise as it is for domestic apparel.	2.6	3.4	2.6	3.0

Note: 1 = Strongly Disagree, 7 = Strongly Agree

Table 4.2 (cont'd.)

N=68

Dimension	Specialty	Department	Discount	Overall
I am buying more imported merchandise for my department this year than I did last year.	3.9	4.3	4.9	4.4
I have found that we can take higher markups on imported merchandise than we can on domestic merchandise.	4.9	5.5	5.6	5.4
Consumers frequently ask for American-made products.	3.4	4.0	3.1	3.6
Before placing an order with a vendor, I find out whether the product is made in America or in a foreign country.	3.8	4.0	4.2	4.0
In buying merchandise for my department, I almost always buy nationally known brand names.	4.7	4.1	2.9	3.9
I depend primarily on the manufacturer to supply me with high quality merchandise.	5.2	4.9	4.9	5.0
I depend primarily on my own knowledge of the product quality to assess the products I buy for my department.	6.1	5.5	5.7	5.7
I do not think that consumers care about where a product is manufactured.	4.8	4.3	4.1	4.4

Note: 1 = Strongly Disagree, 7 = Strongly Agree				

Results and Discussion

The results and discussion section is divided into three sections: (1) Risk and Quality Dimensions, (2) Buy American Campaign Dimensions, and (3) Reasons for Purchasing Imported Apparel.

Risk and Quality Dimensions

The Risk and Quality dimensions, dimensions 1 through 17 on page one of the questionnaire, were first analyzed to identify the mean level of disagreement/agreement with each dimension. Each dimension was examined as a single entity and across retailer types (specialty, department, and discount stores). This information is presented in Table 4.2.

The mean level of disagreement/agreement on the first dimension, "Imported merchandise is more likely to have flaws than domestic apparel," was 2.9. As compared to domestic apparel, respondents perceived imported apparel to be as likely or less likely to have flaws. Discount store buyers indicated the strongest mean level of disagreement (2.2), followed by department store buyers (3.1), and specialty store buyers (3.2). A possible explanation for this may be that discount store buyers had higher tolerance levels for flaws thereby perceiving fewer adverse consequences and hence less purchasing risk.

The second dimension, "If there is something wrong with imported merchandise it is too expensive to return it, so we just absorb the losses," had a mean of 4.5. This indicated that in general buyers are absorbing the losses rather than returning undesirable merchandise. Department store buyers were most likely to absorb the losses (4.8), followed by specialty store buyers (4.4). Discount store buyers

indicated a slight (mean) level of disagreement with dimension two; therefore, they were least likely to absorb losses associated with undesirable imported apparel. A possible explanation for this may be that discount store buyers purchase a much larger proportion of imports and because of greater financial investment returned undesirable merchandise.

The mean level of disagreement/agreement on the third dimension, "There is a lot of red tape to go through before buying imported merchandise," was 3.3. In general, apparel buyers did not associate a lot of red tape with purchasing imported apparel. This may be because the apparel buyers were accustomed to importing, or it may be because they do not buy directly from the manufacturer. Specialty store buyers indicated the strongest level of disagreement (3.1), closely followed by department and discount store buyers both of which indicated a mean level of disagreement of 3.4.

The fourth dimension, "We buy our imported merchandise through a wholesaler rather than buy direct," had a mean of 4.4. This slight level of agreement indicates that the majority of imported apparel was purchased through wholesalers. Specialty store buyers indicated the strongest mean level of agreement (5.4), followed by department store buyers (4.4). Discount store buyers indicated the strongest level of disagreement (3.3) on dimension four. A possible explanation is that discount store buyers purchase a larger proportion of imported apparel and are continuously expanding their repertoire of suppliers as new import restrictions are imposed on specific supplying regions. Thus wholesalers or other intermediaries are utilized as a purchasing pre-test to direct purchasing connections in a region.

The mean level of disagreement/agreement with the fifth dimension, "The sizing for imported merchandise does not really correspond with U.S. sizing," was 2.7. In general, retail buyers perceived that the sizing of imported apparel corresponds to domestically made apparel. Discount store buyers indicated the strongest level of disagreement (1.5) with dimension five, followed by department store buyers (2.9), and specialty store buyers (3.6). Possible explanations are that discount store buyers may not critically evaluate sizing as do department or specialty store buyers, or discount store buyers may have more well developed purchasing arrangements with foreign manufacturers who manufacture apparel to their specification of American sizing.

The sixth dimension, "We have more returns of imported merchandise than we do of U.S. apparel," had a mean of 2.6. This indicates that in general retail buyers perceive they have equal or fewer returns of imported as compared to domestic apparel. Discount store buyers indicated the strongest level of disagreement with dimension six (1.9), followed by specialty store buyers (2.6), and department store buyers (2.8).

The mean level of disagreement/agreement with the seventh dimension, "We generally have to put imported merchandise on sale earlier than we do U.S. apparel," was 2.6. Discount store buyers indicated the strongest level of disagreement with dimension seven (2.0), followed by specialty store buyers (2.5), and department store buyers (3.1). It appears that imported merchandise is put on sale at the same time or later than U.S.-made apparel is put on sale.

The eighth dimension, "Imported merchandise is generally higher quality for the price than domestic merchandise," had a mean of 5.5.

Specialty, department, and discount store buyers indicated the same level of agreement (5.5) on this dimension.

The mean level of disagreement/agreement with the ninth dimension, "Quality control is not as good for imported merchandise as it is for domestic apparel," was 3.0. This indicates that apparel buyers perceived quality control for imports to be comparable to or better than quality control for domestically made apparel. Specialty and discount store buyers indicated the strongest level of disagreement (2.6) with dimension nine, followed by department store buyers (3.4).

The tenth dimension, "I am buying more imported merchandise for my department this year than I did last year," had a mean of 4.4. This indicates that the majority of apparel buyers had increased their purchases of apparel imports. Discount store buyers indicated the strongest mean level of agreement (4.9), followed by department store buyers (4.3). Specialty store buyers indicated a slight mean level of disagreement (3.9) about buying more imported merchandise this year as compared to last year. A possible explanation may be that due to the numerous apparel import restrictions implemented last year, retail buyers with the least purchasing power (smaller purchasing budgets, less knowledgeable about alternative suppliers, or weaker supplier connections) were squeezed out of the import purchasing market.

The mean level of disagreement/agreement with the eleventh dimension, "I have found that we can take higher mark-ups on imported merchandise than we can on domestic merchandise," was 5.4. This supports the contention that retailers are taking higher mark-ups as purported in the study conducted by the United States Department of Commerce (1977). Discount store buyers indicated the highest mean level

of agreement (5.6), closely followed by department store retailers (5.5), then specialty store retailers (4.9). Discount and department store buyers are more likely than specialty store buyers to purchase larger quantities or a larger proportion of imported apparel. They may perceive greater purchasing risk, and directly diffuse this risk by taking higher mark-ups. A second explanation is that discount and department store buyers may get the merchandise at lower cost because of buying large quantities, therefore, they can price merchandise competitively yet retain a larger mark-up margin.

The twelfth dimension, "Consumers frequently ask for American made products," had a mean of 3.6. Discounters indicated the strongest mean level of disagreement (3.1), followed by specialty store buyers (3.4), and department store buyers (4.0). Either consumers are not frequently asking for American made products, or the apparel buyers are not aware of what consumers are asking for.

The mean level of disagreement/agreement with the thirteenth dimension, "Before placing an order with a vendor I find out whether the product is made in America or in a foreign country," was 4.0 (neutral). Little differentiation among retail buyer types on this dimension was found. Discount store buyers had a mean of 4.2, department store buyers had a mean of 4.0, and specialty store buyers had a mean of 3.8.

The fourteenth dimension, "In buying merchandise for my department I almost always buy nationally known brand names," had a mean of 3.9. Specialty store buyers indicated the greatest level of agreement (4.7), followed by department store buyers (4.1). Discount store buyers indicated the strongest mean level of disagreement (2.9). Specialty store

apparel buyers purchased the greatest proportion of nationally known brands, followed by department and discount store buyers.

The mean level of disagreement/agreement with the fifteenth dimension, "I depend primarily on the manufacturer to supply me with high quality merchandise," was 5.0. This finding supports the explanation presented for dimension 13; retail buyers are relying more on specific manufacturers. Specialty store buyers indicated the highest level of agreement (5.2), followed by department and discount store buyers who indicated the same level of agreement (4.9). A possible explanation may be that specialty store buyers perceive the highest degree of purchasing risk and thereby diffuse it via relying on manufacturers.

Dimension sixteen, "I depend primarily on my own knowledge of product quality to assess the products I buy for my department," had a mean of 5.7. Specialty store buyers indicated the highest mean level of agreement (6.1), followed by discount store buyers (5.7), and department store buyers (5.5). It is interesting to note that in general buyers relied on their own knowledge and did not utilize external sources to obtain more information about the merchandise purchased.

The mean level of disagreement/agreement with dimension seventeen, "I do not think consumers care about where a product is manufactured," was 4.4. Specialty store buyers indicated the highest level of agreement (4.8), followed by department store buyers (4.3), and discount store buyers (4.1).

In summary, retail buyer types can be differentiated in terms of these Risk and Quality dimensions. Specialty store buyers can be

characterized as: being heavy purchasers of national brands, buying fewer imports as compared to last year, buying imported merchandise through a wholesaler, and perceiving quality control for imports as good as or better than U.S.-made apparel.

Department store buyers can be characterized as: absorbing the losses if something is wrong with imported merchandise because it is too expensive to return, and taking higher mark-ups on imports.

In contrast, discount store buyers can be characterized as: buying more imported apparel over last year, not being heavy importers of nationally branded merchandise or buying through a wholesaler. They also appeared to perceive imported merchandise to have fewer or the same amount of flaws as compared to domestic apparel, the sizes of imports to be similar to U.S.-made apparel, and quality control to be as good or better for imports. Additionally, discount store buyers appeared to perceive consumers to infrequently ask for American-made products. The practice of not putting imports on sale earlier than U.S.-made apparel, and taking higher mark-ups on imported apparel were two merchandising practices which characterize the discount store buyers.

Development of Risk/Quality Typologies

An "R" type factor analysis was conducted to condense dimensions 1 through 17 into a smaller set of composite product factors which would represent the Risk and Quality dimensions of buying imported apparel. These composite factors were subsequently analyzed as dependent variables. The composite product factors were defined as "exact mathematical transformations of the original data" (Nie, Hull, Jenkins,

Steinbrenner, Bent, 1975, p. 470). This enabled the researcher to extract the particular combinations of variables which accounted for the most linear variations in the initial factors via principal component analysis.

The Principal factoring with iteration method employed "automatically replaces the main diagonal elements of the correlation matrix with communality estimates. Initial estimates of the communalities are given by the squared multiple correlation between a given variable and the rest of the variables in the matrix" (Nie et al., 1975, 480).

This method was selected because it employs an iteration procedure for improving the estimates of communality by determining the number of factors to be extracted from the original correlation matrix. It then replaces the main diagonal elements of the correlation matrix with initial estimates of communalities; the R^2 estimates. This process continues until the differences between the two successive communality estimates are negligible (Nie et al., 1975).

An orthogonal rotation of the factor matrix axes was selected to "reduce some of the ambiguities which often accompany initial unrotated factor solutions" (Hair, Anderson, Tatham, Grablowsky, 1984, p. 226), and to simplify the interpretative process. The nature of orthogonal rotation, rotating the axes 90 degrees, enabled the second factor-solution to be the best linear combination of variables which accounted for the most residual variance after the effects of the first factor-solution was removed (Nie, et al., p. 470).

Factor analysis was used to reduce the risk/quality dimensions. An initial run was used to identify the variables which loaded very low (absolute value of less than or equal to .2) on all factors. Five variables were found to have low loadings: "We buy our imported

merchandise through a wholesaler rather than buy direct" (highest loading was .07), "The sizing for imported merchandise does not really correspond with U.S. sizing" (highest loading was .16), "I have found that we can take higher mark-ups on imported merchandise than we can on domestic merchandise" (highest loading was .11), "In buying merchandise for my department I almost always buy nationally known brand names" (highest loading was .15), "I depend primarily on the manufacturer to supply me with high quality merchandise" (highest loading was .18); this information is presented in Table 4.3 in Appendix D. These factors were then excluded from a second run.

The criterion of eigenvalues greater than or equal to 1.0 was used to select the number of factors extracted. Two factors were identified which explained 76.8% of the variance (Table 4.4).

Within each selected factor variables were then selected which loaded highly (absolute value greater than or equal to .4) on each factor; refer to Table 4.5. These selected variables were used to create composite indices using the equation:

$$\sum_{a=1}^n A \frac{(X - \bar{X})}{SDX},$$

where:

n = # of dimensions per factor,

A = factor-score coefficient,

X = variable value,

$\bar{X}$ = variable mean,

SDX = variable standard deviation

(Nie, et al., 1975, pp. 488-489). These composite indices will be referred to as Risk/Quality typologies.

The Risk/Quality typologies were labeled to reflect the loadings on each variable (Table 4.5). Factor 1, the Import Reliability Factor, included heavy loadings on "Imported merchandise is more likely to have flaws than domestic apparel" (.94), "We have more returns of imported

Table 4.4 - Risk/Quality Factors: Factor Analysis

Factor	Eigenvalue	Cumulative Percent of Variation
1	3.70	59.0
2	1.12	76.8
3	.78	89.3
4	.67	100.0

Table 4.5 - Risk/Quality Dimensions: The Second Factor Loading

Attributes	Factors		Communality
	Import Reliability	American Made	
Imported merchandise is more likely to have flaws than domestic apparel.	.94*	.17	.94
If there is something wrong with imported merchandise it is too expensive to return it, so we just absorb the losses.	.18	.07	.65
There is a lot of red tape to go through before buying imported merchandise.	.08	.10	.49
We have more consumer returns of imported merchandise than we do of U.S. apparel.	.67*	.39	.66
We generally have to put imported merchandise on sale earlier than we do U.S. apparel.	.30	.18	.29
Imported merchandise is generally higher quality for the price than domestic merchandise.	-.40*	-.36	.32
Quality control is not as good for imported merchandise as it is for domestic apparel.	.59*	.20	.43
I am buying more imported merchandise for my department this year than I did last year.	-.22	-.43*	.29
Consumers frequently ask for American-made products.	.28	.93*	.96
Before placing an order with a vender, I find out whether the product is made in America or in a foreign country.	.05	.23	.67

 *Indicates that the attribute loaded highly ($\geq .40$) on a factor.

Table 4.5 (cont'd.)

Attributes	Factors		N=68
	Import Reliability	American Made	Communality
I depend primarily on my own knowledge of the product quality to assess the products I buy for my department.	.11	-.18	.19
I do not think that consumers care about where a product is manufactured.	-.12	-.56*	.39

 *Indicates that the attribute loaded highly ($\geq .40$) on a factor.

merchandise than we do of U.S. apparel" (.67), "Quality control is not as good for imported merchandise as it is for domestic apparel" (.59), and an inverse loading on "Imported merchandise is generally higher quality for the price than domestic merchandise" (-.40).

Factor 2, the American-Made Factor, included a heavy loading on "Consumers frequently ask for American-made products" (.93), "I am buying more imported merchandise for my department this year than I did last year" (-.43), and "I do not think consumers care about where a product is manufactured" (-.56).

Testing H1.1 and H1.2

H1.1: No significant differences exist among buyers' perceptions of cues associated with imported versus domestic apparel; by retail buyer type: specialty, department, and discount stores.

Two analyses of variance (ANOVA's) were conducted to test Hypothesis 1.1. The dependent variables were the Import Reliability Factor and the American-Made Factor (Risk/Quality typology scores derived through the previous factor analysis), and the independent variable was the retail buyer type (specialty, department, and discount stores).

Results of the analysis of variance for the Import Reliability Factor indicated there were no significant differences among retail buyer types (Table 4.6). Additionally, large residual values as compared to that which was explained, indicated that the store type groups did not explain much of variation of the Import Reliability Factor.

The results of the analysis of variance for the American-made Factor indicated there were no significant differences among retail buyer types. Additionally, large residual values indicated the store

Table 4.6 - Risk/Quality Typologies: Analyses of Variance

					N=69
Typology	DF	Sum of Squares	Mean Square	F	Significance of F
Import Reliability					
Explained	2	16.80	8.40	1.77	.18
Residual	66	312.67	4.74		
Total	68	329.47	4.85		

American-Made					
Explained	2	3.98	1.97	.80	.45
Residual	66	163.17	2.47		
Total	68	167.15	2.46		

type groups did not explain much of the variation of the American-Made Factor.

To determine if there was a high degree of association among the demographic variables the correlation coefficients were examined (Table 4.7 in Appendix D). Age and position experience were positively correlated (.74). To minimize the effects of multicollinearity, age and position experience were not included in the same model of the covariate analyses.

H1.2: No significant differences exist among retail buyers' perceptions of cues associated with imported versus domestic apparel by retail buyer type after adjusting for demographic variables (position experience, education, salary).

An analysis of covariance was used to test Hypothesis 1.2. The dependent variables were the Import Reliability Factor and the American-Made Factor (Risk/Quality typology scores derived through the previous factor analysis), the independent variable was retailer buyer type, and the covariates were position experience, education, and salary. Results indicate that no significant main effects or effects of the covariates were found at the $p < .05$ level. Additionally, the R^2 values for the analysis of covariance model were very low (.05 to .12) indicating a substantial proportion of the variation was still unaccounted for; refer to Table 4.8.

Group means for the Import Reliability Factor and the American-Made Factor were compared among specialty, department, and discount store buyers. This information is presented in Table 4.9 in Appendix D.

There were no significant differences among specialty, department, and discount store types of buyers; therefore, the three sub-samples

Table 4.8 – Risk/Quality Typologies: Analyses of Covariance

						N=58	
Typology	DF	Sum of Squares	Mean Square	F	Significance of F	R ²	
Import Reliability							
Main Effects	2	19.28	9.64	2.35	.11	.08	
Covariates	3	17.19	5.73	1.40	.25	.15	
Position Experience	1	.08	.08	.02	.89		
Education	1	4.63	4.63	1.13	.29		
Salary	1	12.48	12.48	3.05	.08		
Explained	5	34.47	7.29	1.78	.13		
Residual	52	212.89	4.09				
Total	57	249.36	4.38				
American-Made							
Main Effects	2	6.29	3.14	1.54	.22	.05	
Covariates	3	8.02	2.67	1.31	.28	.12	
Position Experience	1	.46	.46	.22	.64		
Education	1	.08	.08	.04	.85		
Salary	1	7.49	7.49	3.67	.06		
Explained	5	14.31	2.86	1.40	.24		
Residual	52	106.17	2.04				
Total	57	120.48	2.11				

were combined. Stepwise regression was used to identify buyers' demographic variables which were related to the product typologies.

Results indicate that salary, education, and position experience were not found to be significant predictors ($p < .05$) of the Import Reliability Factor (Table 4.10). Salary was found to be the single significant predictor of the American-Made Factor ($p < .05$). Salary had an inverse relationship with the American-Made Factor (correlation coefficient = $-.28$). Therefore, high salary earners were less likely to purchase American-made apparel than low salary earners. However, salary explained only 8% of the total variance ($R^2 = .08$).

Buy American Campaign Dimensions

The Buy American Campaign dimensions, dimensions 18-25 on page two of the questionnaire, were first analyzed to identify the mean level of disagreement/agreement with each dimension. Each dimension was examined as a single entity across retailer types (specialty, department, and discount stores). This information is presented in Table 4.11.

The mean for the first Buy American Campaign dimension (question 18), "The "Buy American" campaign has influenced me to buy more American-made goods that I would have otherwise," was 2.7. Discount store buyers indicated the strongest mean level of disagreement (2.2), followed by department store buyers (2.8), and specialty store buyers (3.1). It appears that the Buy American campaign in general has not greatly influenced retail apparel buyers to purchase domestically.

The second Buy American Campaign dimension (question 19), "I am currently promoting American-made goods via the inclusion of "Buy American" in advertisements," had a mean of 2.0. Specialty and

Table 4.10 - Risk/Quality Typologies by Buyer Demographics: Stepwise Regression

Typology	DF	Sum of Squares	Mean Square	F	Significance of F	R ²
N=58						
Import Reliability						
Salary Residual	1 56	15.53 233.82	15.53 4.18	3.72	.06	.06
Education Residual	2 55	22.98 226.37	11.50 4.12	2.79	.07	.09
Position Experience Residual	3 54	23.57 225.79	7.86 4.18	1.88	.14	.09

American-Made						
Salary Residual	1 56	9.30 111.17	9.30 1.99	4.69	.04*	.08
Position Experience Residual	2 55	9.37 111.10	4.69 2.02	2.32	.11	.08

*Indicates significance at the p<.05 level.						

Table 4.11 - Buy American Campaign Dimensions: Retail Buyer Type Group Means

Dimension	N=64			
	Specialty	Department	Discount	Total
The "Buy American" campaign has influenced me to buy more American-made goods than I would have otherwise.	3.1	2.8	2.2	2.7
I am currently promoting American-made goods via the inclusion of "Buy American" in advertisements.	1.8	1.8	2.6	2.0
If materials were available I would promote more American-made goods by including "Buy American" in advertisements.	3.8	3.0	2.8	3.2
I am currently using "Buy American" hangtags and labels to promote American-made goods.	2.0	2.0	3.1	2.3
I would use more "Buy American" hangtags and labels to promote American-made goods if they were available.	3.9	3.3	3.3	3.4
I am currently using "Buy American" point-of-purchase display materials in my department.	1.6	1.5	1.7	1.6
I would use more "Buy American" point-of-purchase display materials if they were available.	4.1	3.1	3.1	3.4
The "Buy American" campaign has influenced me to buy more imported goods than I would have otherwise.	2.2	1.5	1.5	1.7
Note: 1 = Strongly Disagree, 7 = Strongly Agree				

department store buyers indicated the strongest level of disagreement (1.8), followed by discount store buyers (2.6).

The mean for the third Buy American Campaign dimension (question 20), "If materials were available, I would promote more American-made goods by including "Buy American" in advertisements," was 3.2. Discount store buyers indicated the strongest mean level of disagreement (2.8), followed by department store buyers (3.0), and specialty store buyers (3.8). A possible explanation is that discount store buyers rely heavily on imported apparel and an inverse relationship exists between the retailers' dependence on imported apparel and their willingness to support the "Buy American" campaign if materials were available. Additionally, it is important to note the weaker level of disagreement with promoting the Buy American campaign if materials were available, as compared to that which they were currently promoting.

The fourth "Buy American" Campaign dimension (question 21), "I am currently using "Buy American" hangtags and labels to promote American-made goods," had a mean of 2.3. A trend similar to that of the second Buy American dimension was identified: specialty and department store buyers indicated the strongest level of disagreement (2.0), followed by discount store buyers (3.1). A possible explanation for this is an inverse relationship exists between the retailers' dependence on imported apparel and their support for the Buy American campaign.

The mean for the fifth Buy American Campaign dimension (question 22), "I would use more "Buy American" hangtags and labels to promote American-made goods if they were available," was 3.4. A trend similar to that identified in the third Buy American Campaign dimension was identified: discount and department store buyers indicated the

strongest mean level of disagreement (3.3), followed by specialty store buyers (3.9). A possible explanation for this was presented in the discussion of the third Buy American Campaign dimension, an inverse relationship exists between the retailers' dependence on imported apparel, and their willingness to support the Buy American campaign if materials were available.

The sixth Buy American Campaign dimension (question 23), "I am currently using "Buy American" point-of-purchase display materials in my department," had a mean of 1.6. Only slight differences in the level of disagreement among store types were found: discount store buyers indicated (1.7), specialty store buyers (1.6), and department store buyers (1.5). In general, buyers exerted little effort to promote the Buy American campaign.

The mean level of disagreement with the seventh Buy American Campaign dimension (question 24), "I would use more "Buy American" point-of-purchase display materials if they were available," was 3.4. A trend similar to that identified in the third and fifth Buy American Campaign dimensions was identified: discount and department store buyers indicated the strongest mean level of disagreement (3.1), followed by specialty store buyers who exhibited a slight level of agreement (4.1). A possible explanation for this was presented in the discussion of the third and fifth Buy American Campaign dimensions: an inverse relationship between the retailers' dependence on imported apparel, and their willingness to support the Buy American campaign if materials were available. Little confirmation was found for promoting the Buy American campaign even if materials were made available.

The mean level of disagreement/agreement with the eighth Buy American Campaign dimension (question 25), "The "Buy American" campaign has influenced me to buy more imported goods that I would have otherwise," was 1.7. Discount and department store buyers indicated the strongest mean level of disagreement (1.5), followed by specialty store buyers (2.2).

Development of the Buy American Campaign Typologies

The procedure in which the Buy American Campaign typologies were developed was similar to that which was previously used to develop the Risk/Quality typologies. An "R" type factor analysis was used to condense the eight Buy American Campaign dimensions into a smaller set of composite factors representing the original dimensions; subsequently to be analyzed as dependent variables.

The initial factor solution produced no variables which loaded low on both factors. Therefore, no variables were eliminated and variables which loaded highly (absolute value greater than or equal to .4) on each factor were selected to be computed into a composite factor-scale variable. Two factors were identified which explained 91.4% of the variance; refer to Table 4.12. The loadings of the Buy American Campaign attributes are presented in Table 4.13.

Factor 1 loaded heavily on four dimensions: "I would use more "Buy American" hangtags and labels to promote American-made goods if they were available" (.90), "I would use more "Buy American" point-of-purchase display materials if they were available" (.82), "If materials were available I would promote more American-made goods by including "Buy American" in advertisements" (.77), and "The "Buy American"

Table 4.12 - Buy American Campaign Factors: Factor Analysis

Factor	Eigenvalue	Cumulative Percent of Variation	N=64
1	3.29	69.9	
2	1.01	91.4	
3	.40	100.0	

Table 4.13 - Buy American Campaign Dimensions: Factor Loadings

N=64			
Attributes	Factors		Communality
	Potential Promotions	Active Promotions	
The "Buy American" campaign has influenced me to buy more American-made goods than I would have otherwise.	.55*	.50*	.55
I am currently promoting American-made goods via the inclusion of "Buy American" in advertisements.	.20	.57*	.43
If materials were available I would promote more American-made goods by including "Buy American" in advertisements.	.77*	.24	.66
I am currently using "Buy American" hangtags and labels to promote American-made goods.	.12	.64*	.43
I would use more "Buy American" hangtags and labels to promote American-made goods if they were available.	.90*	.24	.88
I am currently using "Buy American" point-of-purchase display materials in my department.	.04	.43*	.89
I would use more "Buy American" point-of-purchase display materials if they were available.	.82*	.19	.76
The "Buy American" campaign has influenced me to buy more imported goods than I would have otherwise.	.23	-.03	.10

*Indicates that dimension loaded heavily (> .40) on a factor.			

campaign has influenced me to buy more American-made goods that I would have otherwise" (.55). This composite factor was labeled the Potential Promotions Factor.

Factor 2 loaded heavily on four dimensions: "I am currently using Buy American hangtags and labels to promote American-made goods" (.64), "I am currently promoting American-made goods via the inclusion of "Buy American" in advertisements" (.57), "The "Buy American" campaign has influenced me to buy more American-made goods that I would have otherwise" (.50), and "I am currently using "Buy American" point-of-purchase display materials in my department" (.43). This factor was labeled the Active Promotions Factor.

Testing H2.1 and H2.2

H2.1: No significant differences exist among buyers' perceptions of the Buy American campaign by retail buyer type: specialty, department, and discount stores.

Analyses of variance (ANOVA's) were used to test H2.1. The dependent variables were the Potential Promotions Factor and the Active Promotions Factor (Buy American Campaign typology scores previously derived through factor analysis), and the independent variable was retail buyer type. Results of the analysis of variance for the Potential Promotions Factor indicated that there were no significant differences at the $p < .05$ level (Table 4.14).

Results of the analysis of variance for the Active Promotions Factor indicated that there were no significant differences among retail buyer types.

H2.2: No significant differences exist among buyers' perceptions of the Buy American campaign by retail buyer type after adjusting for demographic variables (age, education, salary).

Table 4.14 - Buy American Campaign Typologies: Analyses of Variance

N=69					
Typology	DF	Sum of Squares	Mean Square	F	Significance of F
Potential Promotions					
Explained	2	7.03	3.52	.47	.63
Residual	66	493.62	7.48		
Total	68	500.65	7.36		

Active Promotions					
Explained	2	3.55	1.77	.74	.48
Residual	66	159.00	2.41		
Total	68	162.55	2.39		

Analyses of covariance were used to test H2.2. The dependent variables were the Potential Promotions Factor and the Active Promotions Factor (Buy American Campaign typology scores derived through the previous factor analysis), the independent variable was retail buyer type, and the covariates were age, education, and salary. Results indicated that significant effects ($p < .05$) were found after adjusting for covariates (Table 4.15).

Of the Potential Promotability Factor, salary was found to be the single significant covariate predictor ($p < .05$). The R^2 values for the analysis of covariance model were low (.03 to .22). Cumulatively, salary, age, and education were significant ($p < .05$), and in addition to the main effects, the demographic variables explained 22% of the total variation.

Of the Active Promotions Factor, age was found to be the single significant covariate ($p < .05$). The cumulative effect of age, education, and salary was significant ($p < .05$); and in addition to the main effects, these covariates explained 18% of the total variation.

A comparison of retail buyer group means with the Potential Promotions Factor and the Active Promotions Factor is presented in Table 4.16 in Appendix D.

The previous analysis did not yield significant differences among the retail buyer classifications. To assess the overall significance of demographics on the two Buy American Campaign typologies, the three sub-sample groups (specialty, department, and discount store buyers) were combined and analyzed as a single entity using stepwise regression. This enabled the researcher to identify buyers' demographic variables which were related to the Buy American Campaign typologies.

Table 4.15 - Buy American Campaign Typologies: Analyses of Covariance

						N=58
Typology	DF	Sum of Squares	Mean Square	F	Significance of F	R ²
Potential Promotions						
Main Effects	2	13.81	6.90	1.07	.35	.03
Covariates	3	78.09	26.03	4.04	.01*	.22
Age	1	14.22	14.22	2.21	.14	
Education	1	.06	.06	.01	.92	
Salary	1	63.79	63.79	9.90	.003*	
Explained	5	91.88	18.38	2.85	.02*	
Residual	52	335.01	6.44			
Total	57	426.89	7.49			
Active Promotions						
Main Effects	2	2.08	1.04	.49	.61	.02
Covariates	3	22.68	7.60	3.58	.02*	.18
Age	1	17.06	17.06	8.08	.01*	
Education	1	1.84	1.84	.87	.36	
Salary	1	3.78	3.78	1.79	.19	
Explained	5	24.76	4.95	2.34	.05*	
Residual	52	108.88	2.11			
Total	57	134.63	2.36			
*Indicates significance at the p<.05 level.						

Results indicated that salary and age were significant predictors ($p < .05$) of the Potential Promotions Factor (Table 4.17). Salary had an inverse relationship with the Potential Promotions Factor (correlation coefficient = $-.39$). High salary earners were less likely to begin promoting the Buy American campaign if materials were available than low salary earners. Age had a direct relationship with the Potential Promotions Factor (correlation coefficient = $.24$). Older buyers were more likely to begin promoting the Buy American campaign if materials were available to them. These variables explained 22% of the total variance of the Potential Promotions Factor ($R^2 = .22$).

Additionally, age and salary were significant predictors ($p < .05$) for the Active Promotions Factor. Age had a direct relationship with the Active Promotions Factor (correlation coefficient = $.32$). Older buyers were more likely to be promoting the Buy American campaign. Salary had an inverse relationship with the Active Promotions Factor (correlation coefficient = $-.11$). High salary earners were less likely to be promoting Buy American than low salary earners. These variables explained 13% of the total variance ($R^2 = .13$) of the Active Promotions Factor.

Reasons for Purchasing Imported Apparel

Buyers were asked to allocate points from 0 to 100 to indicate the reasons they purchased imported apparel (question 40). Each reason was examined as a single entity and across retail buyer types (specialty, department, and discount stores). This information is presented in Table 4.18.

Table 4.17 - Buy American Campaign Typologies by Buyer Demographics: Stepwise Regression

Typology	DF	Sum of Squares	Mean Square	F	Significance of F	R ²
N=58						
Potential Promotability						
Salary Residual	1 56	63.28 363.61	63.28 6.49	9.75	.003*	.15
Age Residual	2 55	91.57 335.32	45.79 6.10	7.51	.001*	.21

Active Promotions						
Age Residual	1 56	13.41 122.22	13.41 2.16	6.20	.016*	.10
Salary Residual	2 55	15.74 118.90	7.87 2.16	3.63	.033*	.12
Education Residual	3 54	17.12 117.51	5.71 2.18	2.62	.060	.13

*Indicates significance at the p<.05 level.						

Table 4.18 - Reasons for Purchasing Imported Apparel: Retail Buyer Type Group Means

Dimension	N=69			
	Specialty	Department	Discount	Total
Foreign products are better quality for the price.	32.50	30.06	31.58	31.12
Foreign manufacturers offer a more unique merchandise selection.	10.11	8.28	11.16	9.55
Higher mark-ups can be taken on imported merchandise.	15.44	30.19	34.32	27.48
Exclusive merchandise/private branding.	19.39	18.13	7.95	15.65
Specification buying.	3.67	5.50	7.11	5.46

The largest number of points (31.12) was allocated to the first reason, "foreign products are better quality for the price." Specialty store buyers indicated the strongest level of importance (32.5 points), closely followed by discount store buyers (31.58), and department store buyers (30.06). The small range among store types indicates there were, in general, only small differences of perceived importance of this reason among buyer types.

The second most important reason (mean = 27.48 points) for purchasing imported apparel was "higher mark-ups can be taken on imported merchandise." Discount store buyers allocated the most points to this reason (34.12), followed by department store buyers (30.19), and specialty store buyers (15.44).

"Exclusive merchandise/private branding," was the third most important reason for buying imported apparel. Although the overall mean (15.65) was much lower than for the first two reasons, a wide range of variation existed among retail buyer types. Specialty store buyers indicated the highest mean level of importance (19.39), followed by department store buyers (18.13), and discount store buyers (7.95). It would be expected that specialty and discount store buyers seek a greater proportion of exclusive or private branded merchandise, and apparently they feel that imports fulfill this requirement.

Few buyers agreed that "foreign manufacturers offer a more unique merchandise selection," was an important reason they purchase imported apparel. The low mean (9.55) indicated either that unique merchandise is of little importance, or the buyers did not feel that imports offer substantial variation from what they can obtain domestically. Discount

store buyers indicated the highest mean level (11.16), followed by specialty store buyers (10.11), and department store buyers (8.28).

The mean number of points allocated to the reason, "Specification buying," was 5.46. Although this reason was given a low mean level of importance among retail buyer types, it is interesting to note that discount store buyers indicated the highest mean level (7.11), followed by department store buyers (5.5), and specialty store buyers (3.67). A possible explanation is that discount store buyers have the largest proportion of exclusive purchasing agreements followed by department store buyers.

Testing H3.1 and H3.2

H3.1: No significant differences exist among buyers' reasons for purchasing imported apparel by retail buyer type: specialty, department, and discount stores.

Analyses of variance were conducted to test H3.1. The dependent variables were the reasons for purchasing imported apparel, and the independent variable was retail buyer type (specialty, department, and discount stores). Results of these analyses are presented in Table 4.19.

Two reasons for purchasing imported apparel were found to be significant ($p < .05$). "Higher mark-ups can be taken on imported merchandise" was found significant at the $p < .01$ level. "Exclusive merchandise/private branding" was significant at the $p < .04$ level.

Scheffe's post hoc analysis was used to investigate existing differences of the reason "higher mark-ups can be taken on imported merchandise" among store types. Significant differences ($p < .05$) were identified between specialty and department stores, and specialty and

Table 4.19 - Reasons for Purchasing Imported Apparel:
Analyses of Variance

					N=69
Reason	DF	Sum of Squares	Mean Square	F	Significance of F
Foreign products are better quality for the price.					
Explained	2	74.07	37.07	.06	.94
Residual	66	40821.01	618.50		
Total	68	40895.07	601.40		

Foreign manufacturers offer a more unique merchandise selection.					
Explained	2	106.30	53.15	.24	.79
Residual	66	14434.77	218.71		
Total	68	14541.07	231.84		

Higher mark-ups can be taken on imported merchandise.					
Explained	2	3729.79	1864.90	4.89	.01*
Residual	66	25185.43	381.60		
Total	68	28915.22	425.22		

Exclusive merchandise/private branding.					
Explained	2	1574.93	787.46	3.49	.04*
Residual	66	14894.73	225.68		
Total	68	16469.65	242.20		

*Indicates significance at p<.05.					

Table 4.19 (cont'd.)

					N=69
Reason	DF	Sum of Squares	Mean Square	F	Significance of F
Specification buying.					
Explained	2	109.37	54.69	.32	.73
Residual	66	11195.79	169.63		
Total	68	11305.16	166.25		

*Indicates significance at $p < .05$.					

discount stores. Discount store buyers indicated the greatest agreement with this reason for purchasing imports (34.32), closely followed by department store buyers (30.19), and then specialty store buyers (15.44).

H3.2: No significant differences exist among buyers' reasons for purchasing imported apparel by retail buyer type after adjusting for demographic variables (age, education, salary).

Analyses of covariance were used to test H3.2. The dependent variables were the reasons for purchasing imported apparel, the independent variable was retail buyer type, and the covariates were age, education, and salary. This test was conducted to control for variations caused by the demographic variables (age, education, and salary) which may influence the buyers' responses (Table 4.20). Results indicate that the importance of two reasons for purchasing imported apparel were significantly different among the retailer types ($p < .05$).

The reason "higher mark-ups can be taken on imported merchandise" was significant at the $p < .01$ level. Age, education, and salary were not found to have a significant influence on this reason for purchasing imported apparel. The main effects explained only 13% of the total variation.

The "exclusive merchandise/private branding" reason was found to be significant at the $p < .03$ level. Age, education, and salary were not found to have a significant influence on this reason for purchasing imported apparel. The main effects were found to explain 10% of the total variation.

Additionally, a comparison of mean scores of reasons for purchasing imported apparel among retail buyer types is presented in Table 4.21 in Appendix D. Results indicated little differentiation among

Table 4.20 - Reasons for Purchasing Imported Apparel: Analyses of Covariance

Reason	DF	Sum of Squares	Mean Square	F	Significance of F	R ²
Foreign products are better quality for the price.						
Main Effects						
Covariates	2	74.07	37.03	.06	.94	.00
Age	3	800.04	266.68	.42	.74	.02
Education	1	132.20	132.20	.21	.65	
Salary	1	191.07	191.07	.31	.59	
	1	476.77	476.77	.75	.39	
Explained Residual	5	847.10	174.82	.28	.93	
	63	40020.97	635.25			
Total	68	40895.07	601.40			
Foreign manufacturers offer a more unique merchandise selection.						
Main Effects						
Covariates	2	106.30	53.15	.24	.79	.00
Age	3	592.42	197.47	.90	.45	.05
Education	1	132.79	132.79	.60	.44	
Salary	1	169.68	169.68	.77	.38	
	1	289.96	289.96	1.32	.26	
Explained Residual	5	698.72	139.74	.64	.67	
	63	13842.35	219.72			
Total	68	14541.07	213.84			

*Indicates significance at the p<.05 level.

Table 4.20 (cont'd.)

Reason	DF	Sum of Squares	Mean Square	F	Significance of F	R ²
Higher mark-ups can be taken on imported merchandise.						
Main Effects	2	3729.79	1864.90	4.76	.01*	.13
Covariates	3	507.49	169.16	.43	.73	.15
Age	1	384.26	384.26	.98	.33	
Education	1	25.41	25.41	.07	.80	
Salary	1	97.81	97.81	.25	.62	
Explained Residual	5 63	4237.28 24677.94	847.46 391.71	2.16	.07	
Total	68	28915.22	425.22			
Exclusive merchandise/private branding.						
Main Effects	2	1574.93	787.46	3.64	.03*	.10
Covariates	3	1246.74	415.58	1.92	.14	.17
Age	1	68.65	68.65	.32	.58	
Education	1	411.91	411.91	2.04	.16	
Salary	1	736.19	736.19	3.40	.07	
Explained Residual	5 63	2821.67 13647.98	564.33 216.64	2.61	.03*	
Total	68	16469.65	242.20			
*Indicates significance at the p<.05 level.						

Table 4.20 (cont'd.)

Reason	DF	Sum of Squares	Mean Square	F	Significance of F	R ²
Specification buying.						
Main Effects	2	109.37	54.69	.31	.74	.01
Covariates	3	63.74	21.25	.12	.95	.02
Age	1	30.70	30.70	.17	.68	
Education	1	24.42	24.42	.14	.71	
Salary	1	8.62	8.62	.05	.83	
Explained	5	173.11	34.62	.20	.96	
Residual	63	11132.05	176.70			
Total	68	11305.16	166.25			
*Indicates significance at the p<.05 level.						

retail buyer types after adjusting for independent variables and covariates.

A stepwise regression analysis was run of each reason ("Foreign products are better quality for the price," "Foreign manufacturers offer a more unique merchandise selection," "Higher mark-ups can be taken on imported merchandise," "Exclusive merchandise/private branding," and "Specification buying") by the demographic variables (position experience, education, salary).

Results indicate that only one reason for purchasing imported apparel, "Exclusive merchandise/private branding" was significant (Table 4.22). Two significant predictors were found: salary and position experience. Salary was found to be a significant predictor at the p.01 level; explaining 34% of the total variance. Additionally, position experience was significant at $p < .03$, cumulatively explaining 39% of the total variance.

Both salary (correlation coefficient = $-.58$) and position experience (correlation coefficient = $-.07$) were inversely related to the exclusive merchandise/private branding reason for purchasing imported apparel. Therefore, high salary earners and/or buyers with more position experience are less likely to purchase imports for the exclusive merchandise/private branding reason.

Additional Regression Analysis Results

An additional stepwise regression analysis was run for each typology by reasons for purchasing imported apparel to identify purchasing reasons which could be used as predictor variables for the Risk/Quality

Table 4.22 - Reasons for Purchasing Imported Apparel by Buyer Demographics: Stepwise Regression

Reason	DF	Sum of Squares	Mean Square	F	Significance of F	R ²
Foreign products are better quality for the price. (N=13)						
Position Experience Residual	1 11	84.33 714.44	84.33 64.95	1.30	.28	.11
Salary Residual	2 10	85.43 713.34	42.71 71.33	.60	.57	.11
Education Residual	3 9	89.33 709.44	29.78 78.83	.38	.77	.11
Foreign manufacturers offer a more unique merchandise selection. (N=13)						
Salary Residual	1 11	45.51 227.41	45.51 20.67	2.20	.17	.17
Education Residual	2 10	64.89 208.04	32.44 20.80	1.56	.26	.24
*Indicates significance at the p<.05 level.						

Table 4.22 (cont'd.)

Reason	DF	Sum of Squares	Mean Square	F	Significance of F	R ²
Higher mark-ups can be taken on imported merchandise. (N=13)						
Position Experience Residual	1 11	251.16 826.07	251.16 75.10	3.34	.10	.23
Education Residual	2 10	263.89 813.34	131.95 81.33	1.62	.25	.25
Exclusive merchandise/ private branding. (N=17)						
Salary Residual	1 15	417.82 804.65	417.82 53.64	7.79	.01*	.34
Position Experience Residual	2 14	479.26 743.21	239.63 53.09	4.51	.03*	.39
Education Residual	3 13	487.47 735.00	162.49 56.54	2.87	.08	.40
*Indicates significance at the p<05 level.						

Table 4.22 (cont'd.)

Reason	DF	Sum of Squares	Mean Square	F	Significance of F	R ²
Specification buying. (N=17)						
Education Residual	1 15	28.47 600.00	28.47 40.00	.71	.41	.05
Salary Residual	2 14	85.28 543.20	42.64 38.80	1.10	.36	.14
Position Experience Residual	3 13	127.20 501.27	42.40 38.56	1.20	.38	.20
-----*Indicates significance at the p<.05 level.						

and Buy American Campaign typologies. Results of the stepwise regression of Risk/Quality typologies is presented in Table 4.23.

Results of the stepwise regression of the Import Reliability Factor indicate that the reasons for purchasing imported apparel were not found to be significant predictors of the Risk/Quality typologies.

Stepwise regression results of the American-Made Factor identified three significant predictors ($p < .05$): "Exclusive merchandise/private branding" explained the most variation ($R^2 = .31$), followed by "Specification buying" ($R^2 = .42$), and "Higher mark-ups can be taken on imported merchandise;" cumulatively explaining 51% of the total variance ($R^2 = .51$). These three reasons were found to be directly related to the American-Made Factor: exclusive merchandise/private branding (correlation coefficient = .56), specification buying (correlation coefficient = .28), higher mark-ups can be taken on imported merchandise (correlation coefficient = .13). Therefore, buyers who purchase with a high priority on exclusive merchandise/private branding, specification buying, or mark-up potential, would be more likely to purchase American-made apparel than those who indicated little importance on these reasons.

Results of the stepwise regression of the Buy American Campaign typologies are presented in Table 4.24 in Appendix D. The reasons for purchasing imported apparel were not found to be significant predictors of the Buy American typologies at the $p < .05$ level.

Summary of Results

A summary of the significant findings of the statistical analyses is presented in Table 4.25. The Risk/Quality dimensions were reduced

Table 4.23 – Risk/Quality Typologies by Reasons for Purchasing Imported Apparel: Stepwise Regression

Typology	DF	Sum of Squares	Mean Square	F	Significance of F	R ²	N=15
Import Reliability							
Exclusive merchandise/ private branding Residual	1	8.39	8.39	3.64	.08	.22	
	13	29.94	2.30				
Higher mark-ups Residual	2	13.77	6.89	3.37	.07	.36	
	12	24.55	2.05				
Unique merchandise Residual	3	15.02	5.01	2.36	.13	.63	
	11	23.31	2.12				
Specificaton buying Residual	4	15.09	3.77	1.62	.24	.39	
	10	23.24	2.32				
							77

 *Indicates the reason was significant at the p<.05 level.

Table 4.23 (cont'd)

Typology	DF	Sum of Squares	Mean Square	F	Significance of F	R ²
N=15						
American-Made						
Exclusive merchandise/ private branding Residual	1 13	8.44 18.67	8.44 1.44	5.88	.03*	.31
Specification buying Residual	2 12	11.27 15.85	5.64 1.32	4.27	.04*	.42
Higher mark-ups Residual	3 11	13.79 13.33	4.60 1.21	3.79	.04*	.51
Quality for the price Residual	4 10	14.66 12.46	3.67 1.25	2.94	.08	.54
Unique merchandise Residual	5 9	15.73 11.39	3.15 1.27	2.49	.11	.58

*Indicates the reason was significant at the p<.05 level.						

using Factor Analysis: two factors (Import Reliability and American-Made) were identified. No significant differences were found among retail buyer types before or after adjusting for demographic covariate variables. Additionally, a regression analysis of the Risk/Quality typologies of all buyers by demographic variables identified salary as the single predictor variable for the American-Made Factor. Salary had an inverse relationship with the American-Made Factor (correlation coefficient = $-.28$). Therefore, high salary earners were less likely to purchase American-made apparel than low salary earners.

The Buy American Campaign dimensions were individually analyzed across retail buyer types using group means; little differences were found. The Buy American Campaign dimensions were then reduced using Factor Analysis of which two factors (Potential Promotions and Active Promotions) were identified. Significant differences among retail buyer types were found after adjusting for the demographic variables through an analysis of covariance. Salary was the single significant covariate predictor for the Potential Promotions Factor; an inverse relationship was identified. The lower salary earners had more willingness to promote the Buy American campaign if materials were available than the higher salary earners. Age was the single significant covariate predictor variable for the Active Promotions Factor; a direct relationship was identified. The older buyers were promoting the Buy American campaign more than the younger buyers. Additionally, stepwise regression analysis of the Buy American Campaign typologies of all buyers by demographic variables identified both salary and age as significant predictors of both Buy American Campaign typologies.

The Reasons for Purchasing Imported Apparel were individually analyzed across retail buyer types using group means. Differences among retail buyer types were identified for two reasons using an analysis of variance: "higher mark-ups can be taken on imported merchandise," and "exclusive merchandise/private branding." After adjusting for the effects of demographic variables, the "exclusive merchandise/private branding" reason was significantly different among retail buyer types.

The three classifications of buyers were combined and a stepwise regression analysis of each reason for purchasing imports by buyer demographic variables was analyzed. Salary and position experience were significant predictor variables for the reason "Exclusive merchandise/private branding." Both salary and position experience were inversely related to the "exclusive merchandise/private branding" reason for purchasing imported apparel. Therefore, high salary earners and/or buyers with more position experience are less likely to purchase imports for the "exclusive merchandise/private branding" reason.

Additional stepwise regression analyses were conducted of each Risk/Quality Factor and Buy American Campaign Factor by Reasons for Purchasing Imported Apparel. One Risk/Quality Factor, the American-Made Factor, was found to have three significant predictors: "exclusive merchandise/private branding," "specification buying" and "higher mark-ups can be taken on imported merchandise." These three reasons were directly related to the American-Made Factor. Therefore, buyers who purchase with a high priority on exclusive merchandise/private branding, specification buying, or mark-up potential, would be more likely to purchase American-made apparel than those who indicated little importance on these reasons.

CHAPTER V

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Summary

The summary section will be divided into two dimensions: methodology, and analyses and findings.

Summary of Methodology

The purpose of this study was to investigate retail buyers' perceptions of quality, purchasing risk, and handled risk associated with imported versus domestic apparel, and the Buy American campaign. The objectives of this research included: (1) investigate cues associated with imported apparel as compared to U.S.-made apparel, (2) investigate retail buyers' perceptions of the Buy American campaign, (3) investigate retail buyers' reasons for purchasing imported apparel.

Survey methodology was used to obtain a national sample of retail buyers. The sample was selected using a random numbers table from three current directories which listed retail buyers' names and store addresses: Directory of Discount Department Stores, The 1984 Directory of Department Stores, Women's and Children's Wear Buyers.

A questionnaire was developed to collect information to test the hypotheses. The questionnaire included a series of statements related

to the Risk/Quality and Buy American Campaign dimensions, reasons for purchasing imported apparel, and information about the buyer.

The surveying process consisted of three steps. First, questionnaires with cover letters were mailed to the entire sample; second, non-respondents were mailed a post card with a cover letter; third, affirmative post card respondents were mailed another questionnaire. Adjusting for 'return to sender' questionnaires this study yielded a 15.4% response rate of a possible 448 respondents.

Summary of Analyses and Findings

Descriptive analyses were used: to describe the sample population by store type with demographic information, to identify overall trends among retail buyers, and to identify trends among retail buyer types.

R-type factor analysis was used to develop Risk/Quality and Buy American Campaign typologies. Variables which loaded less than .2 on all factors were then excluded and a second factor analysis was run.

The number of factors selected was based on the criterion of eigenvalues greater than or equal to 1.0. Within each selected factor, variables were selected which loaded greater than or equal to .4 and were then combined to create composite indices (Import Reliability, American-Made, Potential Promotions, Active Promotions). These composite factors were subsequently used as dependent variables.

Analyses of variance and analyses of covariance were used to test the hypothesized relationships among the variables. Regression analyses were used to identify predictor variables of the Risk/Quality and Buy American Campaign typologies, and reasons for purchasing imported apparel.

Significant findings related to the hypotheses are presented in Table 5.1. No significant differences were found among retail buyer types of the Risk/Quality dimensions. Therefore, H1.1 and H1.2 were not rejected.

Significant differences were found among retail buyer types of the Buy American Campaign typologies only after adjusting for the effects of the demographic variables (covariates). Salary had a significant effect on the Potential Promotions Factor, and age had a significant effect on the Active Promotions Factor. Therefore, H2.1 was not rejected, and H2.2 was rejected.

A regression analysis of Buy American Campaign typologies by demographic factors identified two significant predictor variables. Salary and age were significant predictors of both the Potential Promotions Factor and the Active Promotions Factor. Salary was inversely related to both Buy American Campaign Factors. High salary earners were less likely to be promoting or begin promoting Buy American than low salary earners. Age had a direct relationship to both Buy American Campaign Factors. Older buyers were more likely to be promoting or begin promoting Buy American than younger buyers.

Of the reasons for purchasing imported apparel, two reasons were found to be significantly differentiated among retail buyer types: (1) "Higher mark-ups can be taken on imported merchandise," and (2) "Exclusive merchandise/private branding." Scheffe's post hoc analysis was used to identify differences between discount and specialty store buyers on the higher mark-up potential reason. Discount store buyers indicated the greatest agreement with this reason for purchasing imports, closely followed by department store buyers, and then specialty

Table 5.1 - Summary of Hypothesis Testing

Hypothesis	Test	Result	Evaluation
H1.1 Model	Analysis of Variance Dependent Variable = Risk typologies Independent Variable = Retail buyer type	Not Significant	Not Rejected
H1.2 Model	Analysis of Covariance Dependent Variable = Risk typologies Independent Variable = Retail buyer type Covariates = Position experience, education, salary	Not Significant	Not Rejected
H2.1 Model	Analysis of Variance Dependent Variable = Buy American typologies Independent Variable = Retail buyer type	Not Significant	Not Rejected
H2.2 Model	Analysis of Covariance Dependent Variable = Buy American typologies Independent Variable = Retail buyer type Covariates = Age, education, salary	Significant	Rejected
H3.1 Model	Analysis of Variance Dependent Variable = Reasons for purchasing imported apparel Independent Variable = Retail buyer type	Significant	Rejected
H3.2 Model	Analysis of Covariance Dependent Variable = Reasons for purchasing imported apparel Independent Variable = Retail buyer type Covariates = Age, education, salary	Significant	Rejected <i>NS</i>
----- Note: Significance was established at the $p < .05$ level.			

store buyers. After adjusting for the effects of the covariates on reasons for purchasing imported apparel, retail buyer types were still significantly differentiated on the "Exclusive merchandise/private branding" reason. Therefore, H3.1 and H3.2 were rejected.

Regression analyses of each reason for purchasing imported apparel by demographic factors identified two significant predictor variables. Salary and position experience were found to be significant predictor variables for the "Exclusive merchandise/private branding" reason. Both salary and position experience were inversely related to the "Exclusive merchandise/private branding" reason for purchasing imported apparel. High salary earners and/or buyers with more position experience are less likely to purchase imports for the "Exclusive merchandise/private branding" reason.

Although findings of hypothesis testing of Risk/Quality typologies did not reflect significant differences among retail buyer types, a descriptive analysis of Risk/Quality dimensions among buyer type group means indicated that differences did exist. Specialty store buyers had the highest level of agreement with buying the greatest proportion of national brands, buying fewer imports as compared to last year, buying imported merchandise through a wholesaler, and perceiving quality control for imports being as good as or better than for U.S.-made apparel.

Department store buyers had the highest level of agreement with absorbing the losses (if something is wrong with imported merchandise) because it is too expensive to return, and taking higher mark-ups on imported apparel.

Discount store buyers were buying more imported apparel this year over last year, utilized wholesalers more, and were not heavy importers

of nationally branded merchandise. These buyers perceived quality control to be as good as or better for imports, and felt that imports had fewer or the same amount of flaws when compared to domestic apparel. The sizes of imported apparel were viewed as similar to U.S.-made apparel. They indicated that consumers do not frequently ask for American-made products. Discount store buyers indicated that they were the least likely to put imports on sale earlier than U.S.-made apparel, and very likely to take higher mark-ups on imported apparel.

Retail buyer types were then combined and analyzed as a single entity to identify overall trends and predictor variables for Risk/Quality typologies, Buy American Campaign typologies, and reasons for purchasing imported apparel.

"Foreign products are better quality for the price" was the most important reason among retail buyers for purchasing imported apparel. The second most important reason was that higher mark-ups could be taken on imported merchandise. A third reason was exclusive merchandise/private branding. Additional predictor variables of the Risk/Quality and Buy American Campaign typologies and reasons for purchasing imported apparel for retail buyers as a whole were found. Of the Risk/Quality typologies, "salary," "exclusive merchandise/private branding," "specification buying," and "higher mark-ups can be taken on imported merchandise," were significant predictor variables for the American-Made Factor.

Implications

No significant differences were found among speciality, department, and discount store buyers on the Risk/Quality Factors (Hypotheses

1.1 and 1.2). This lack of significant findings may be due to the use of dimensions for which scale reliability had not previously been established.

Descriptive analyses were relied upon to identify trends. Retail buyers appeared to perceive imported merchandise to be of better or comparable quality to U.S.-made merchandise. This was deduced from buyers' disagreement with: (1) imported apparel is more likely to have flaws, (2) sizings of imported apparel does not correspond with U.S.-made apparel, and (3) quality control is not as good for imported merchandise. This contradicts Dickerson's findings (1982) that 47% of consumers perceived domestically made apparel to be of better quality than imports and only 30% perceived imported apparel quality to be better or comparable to imports.

Differential price/quality relationships appeared to exist among retailer types. Department store buyers assigned a lower level of importance to this reason than did the other retail buyer types. This is consistent with Cline's (1979) finding that department stores have the highest priced imports of comparable quality among retailer types.

Department store buyers were found to be most likely to absorb the loss rather than returning faulty merchandise (because it was too expensive to return), followed by specialty store buyers. This is supported by Cline (1979) that higher risk was perceived with purchasing imported apparel due to no return options to the supplier. However, discount store buyers indicated a slight level of disagreement with absorbing the loss.

Significant differences were found among specialty, department, and discount store buyers on the Buy American Campaign Factors only

after adjusting for the effects of the covariates. Specifically, salary was found to have a significant inverse relationship with the level of agreement with willingness to promote the Buy American campaign using hangtags and labels, point of purchase displays and "Buy American" in advertisements if materials were available. Lower salary earners may be motivated to promote Buy American if monetary incentives were offered. This contradicts the trend identified by Dickerson (1982) that consumers' with the lowest and highest incomes are least concerned with the import issue.

Age was found to have a significant direct relationship with currently promoting the Buy American campaign. Domestic manufacturers may find it beneficial to target American-made apparel and Buy American trade promotions to older buyers.

Descriptive analyses were relied upon to identify trends. Little attempt to promote the Buy American campaign and little willingness to begin promoting the Buy American campaign if materials were made available was found. Therefore, the effectiveness of targeting the Buy American campaign to retailers should be re-evaluated.

Significant differences were found among specialty, department, and discount store buyers on one reason for purchasing imported apparel. Discount and department store buyers had significantly higher levels of agreement with purchasing imports because "higher mark-ups can be taken on imported merchandise" as compared to speciality store buyers. Domestic and foreign manufacturers are advised to target their merchandise which is differentiated on non-cost factors more toward specialty store buyers than department and discount store buyers.

Recommendations for Future Study

The model presented on page 6, served as a conceptual framework of cues associated with perceived purchasing risk and handled risk. As a conceptual tool the model was useful for analyzing retail purchasing strategies. Quantification of the variables within the model would enrich our understanding of retail purchasing strategies.

A second recommendation is to use a telephone survey methodology. This would likely improve the response rate of retail buyers as a limitation of this study was the small sample size (69 respondents). There is a trade-off of cost with amount and level of information possible through telephone survey.

A third recommendation is to validate buyers' names and addresses with currently employed buyers. This would likely reduce 'return to senders' and increase the response rate. Addresses taken from the most recently published directory yielded a higher response ratio than the older directories.

A fourth recommendation is to pretest a more comprehensive set of Risk/Quality dimensions. Significant dimensions could be developed into an Import Purchasing Risk measure including Purchasing Consequences, Probability of Consequences, and Importance of Consequences. Several Risk/Quality dimensions did not load heavily on either factor, and through the analysis of scale reliability these dimensions would be more meaningful.

A paucity of information is available in this area. Therefore, the conceptual model presented is recommended to be a seed which stimulates additional research.

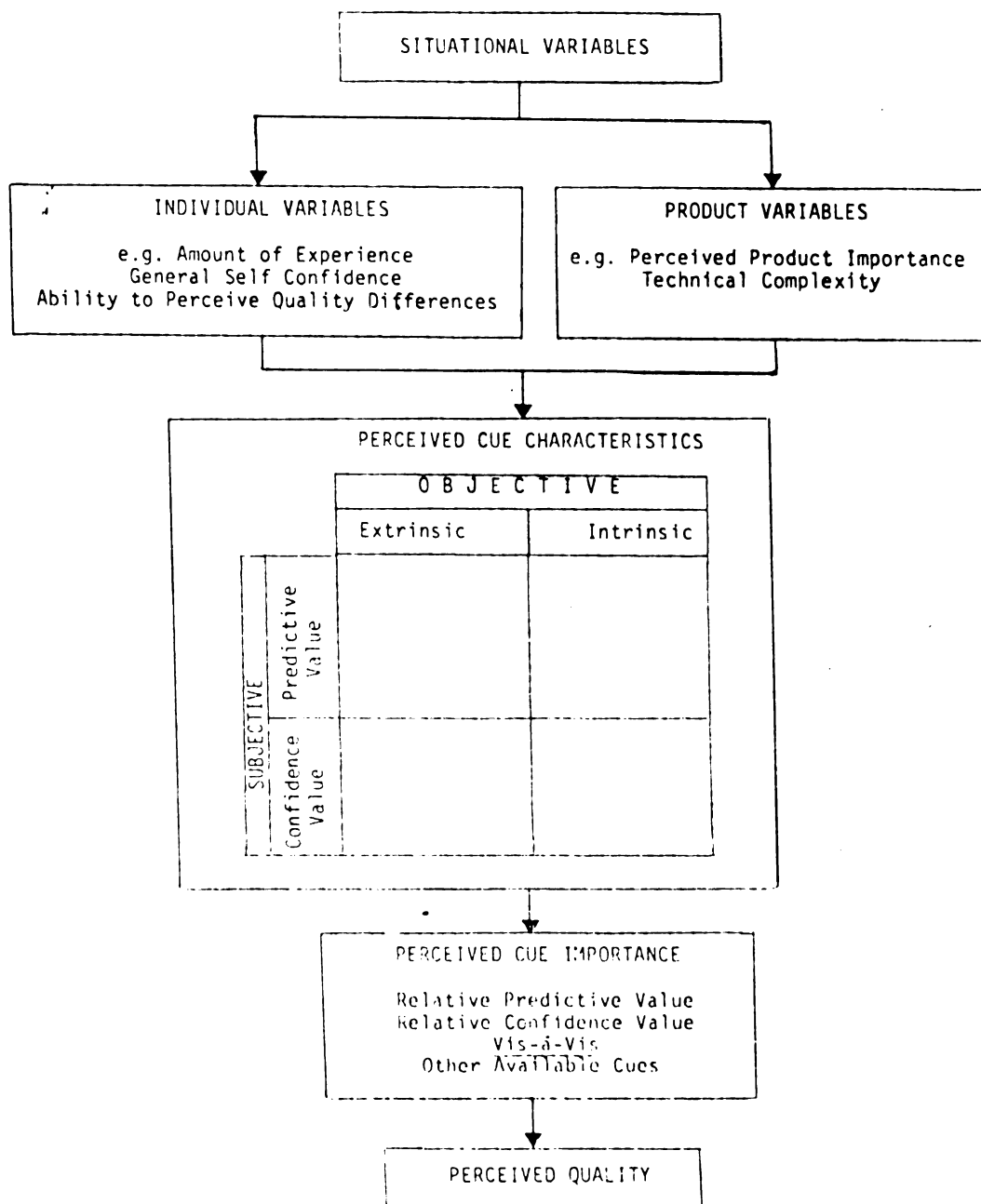
APPENDICES

APPENDIX A

APPENDIX A

Figure 1.2

A FRAMEWORK OF CUE IMPACT ON QUALITY PERCEPTIONS



APPENDIX B

APPENDIX B

Legislation regulating imported textiles and apparel began in 1961. The Short Term Cotton Textile Arrangement (STA) was the first internationally recognized agreement on textile and apparel trade. This temporary 12 month agreement consisted of basic principles and objectives regarding trade in cotton textiles. It allowed for a 5% annual growth rate for member nations (many countries were not members of this arrangement and therefore not subject to regulation) (Keh, 1978; Daniels, 1978).

Following the STA, the Long Term Cotton Textile Arrangement (LTA) was enacted in 1962; reinstated in 1967 and 1970. It also allowed for a 5% annual textile import quota growth rate. Both the STA and the LTA could restrain imports to the level of the first 12 months of the preceding 15 months, if an importing country is threatened by or subject to market disruption in any of 64 categories of cotton textiles (Keh, 1978; Daniels, 1978).

Other related legislation that regulates trade of textiles and apparel includes: Section 502(c)(4) of the Trade Act of 1974, and Item 807 of the Tariff Scheduled of the U.S. (TSUS). Section 502(c)(4) "specifically requires the President, in determining whether a beneficiary status could be granted to a country to take account of the extent to which such country has assured the U.S. it will provide equitable and reasonable access to its markets and basic commodity resources of such country" (Daniels, 1983). This beneficiary status is commonly referred to as most Favored Nation Status.

Item 807 of the (TSUS) stated that duty will be charged only on the value added to garments produced "off shore." This specifically applies to domestic companies who assemble garments in foreign countries. An underlying stipulation of this is that the garments must be pre-cut in the United States, then shipped abroad for sewing, then brought back to the United States for sale. Manufacturing companies who utilize Item 807 can take advantage of cheaper foreign labor and thereby reap substantial cost savings. This legislation directly aids domestic manufacturers (Seidel, October 1983).

APPENDIX C

APPENDIX C

() () ()
1 2 3

This study of retail buyers' attitudes about apparel imports and the "Buy American" campaign is being conducted by researchers at Michigan State University. As a buyer we would like you to give us your own feelings. Your feelings may or may not reflect the attitudes of others within your organization. All responses will be held in strictest confidence and your anonymity is guaranteed. This questionnaire is being sent to over 300 buyers from across the nation. The results of this aggregate analysis will be available to you if you contact Dr. Brenda Witter, 114 Human Ecology, Michigan State University, East Lansing, Michigan 48824.

Please indicate your agreement or disagreement with the following statements by circling a number from 1 to 7.

	Strongly Disagree					Strongly Agree					
1. Imported merchandise is more likely to have flaws than domestic apparel.	1	2	3	4	5	6	7		(4)		
2. If there is something wrong with imported merchandise it is too expensive to return it, so we just absorb the losses.	1	2	3	4	5	6	7		(5)		
3. There is a lot of red tape to go through before buying imported merchandise.	1	2	3	4	5	6	7		(6)		
4. We buy our imported merchandise through a wholesaler rather than buy direct.	1	2	3	4	5	6	7		(7)		
5. The sizing for imported merchandise does not really correspond with U.S. sizing.	1	2	3	4	5	6	7		(8)		
6. We have more returns of imported merchandise than we do of U.S. apparel.	1	2	3	4	5	6	7		(9)		
7. We generally have to put imported merchandise on sale earlier than we do U.S. apparel.	1	2	3	4	5	6	7		(10)		
8. Imported merchandise is generally higher quality for the price than domestic merchandise.	1	2	3	4	5	6	7		(11)		
9. Quality control is not as good for imported merchandise as it is for domestic apparel.	1	2	3	4	5	6	7		(12)		
10. I am buying more imported merchandise for my department this year than I did last year.	1	2	3	4	5	6	7		(13)		
11. I have found that we can take higher markups on imported merchandise than we can on domestic merchandise.	1	2	3	4	5	6	7		(14)		
12. Consumers frequently ask for American made products.	1	2	3	4	5	6	7		(15)		
13. Before placing an order with a vendor I find out whether the product is made in America or in a foreign country.	1	2	3	4	5	6	7		(16)		
14. In buying merchandise for my department I almost always buy nationally known brand names.	1	2	3	4	5	6	7		(17)		
15. I depend primarily on the manufacturer to supply me with high quality merchandise.	1	2	3	4	5	6	7		(18)		
16. I depend primarily on my own knowledge of the product quality to assess the products I buy for my department.	1	2	3	4	5	6	7		(19)		
17. I do not think that consumers care about where a product is manufactured.	1	2	3	4	5	6	7		(20)		

APPENDIX C

Please refer to the following "Buy American" examples and indicate your agreement or disagreement with the following statements.



QUALITY
WITH PRICE
ADVANTAGE



Strongly
Disagree

Strongly
Agree

18. The "Buy American" campaign has influenced me to buy more American-made goods than I would have otherwise. 1 2 3 4 5 6 7 (21)
19. I am currently promoting American made goods via the inclusion of "Buy American" in advertisements. 1 2 3 4 5 6 7 (22)
20. If materials were available I would promote more American-made goods by including "Buy American" in advertisements. 1 2 3 4 5 6 7 (23)
21. I am currently using "Buy American" hangtags and labels to promote American-made goods. 1 2 3 4 5 6 7 (24)
22. I would use more "Buy American" hangtags and labels to promote American-made goods if they were available. 1 2 3 4 5 6 7 (25)
23. I am currently using "Buy American" point-of-purchase display materials in my department. 1 2 3 4 5 6 7 (26)
24. I would use more "Buy American" point-of-display materials if they were available. 1 2 3 4 5 6 7 (27)
25. The "Buy American" campaign has influenced me to buy more imported goods than I would have otherwise. 1 2 3 4 5 6 7 (28)

26. Using your best estimate, what percent of the total merchandise that you buy for your organization is manufactured in a foreign country? _____ (29-30)

27. If you buy the following items for your department what percent would you estimate is manufactured in a foreign country?

_____ % Sweaters (31-32)	_____ % Slacks (33-34)	_____ % Shirts (woven) (35-36)
_____ % Shirts (knit) (37-38)	_____ % Jackets (39-40)	_____ % Coats (41-42)
_____ % Suits (43-44)	_____ % Ties/scarves (45-46)	_____ % Shoes (47-48)
_____ % Hosiery (49-50)	_____ % Dresses (51-52)	_____ % Skirts (53-54)

28. In your buying area what has been the increase or decrease in buying of merchandise manufactured in these foreign countries in the past two years?

Increase Decrease

_____ % _____	Mexico and other Caribbean Countries	(55-57)
_____ % _____	Korea, Taiwan, Singapore, etc.	(58-60)
_____ % _____	China	(61-63)
_____ % _____	Japan	(64-66)
_____ % _____	European Countries (England, Germany, Italy, etc.)	(67-69)
_____ % _____	Others (Please specify: _____)	(70-72)
		(73-75)

29. What is your average initial markup for apparel products from the following countries?

_____ United States	(76-77)
_____ Mexico and other Caribbean Countries	(78-79)
_____ Korea, Taiwan, Singapore etc.	(2/4-5)
_____ China	(2/6-7)
_____ Japan	(2/8-9)
_____ European Countries (England, Germany, Italy, etc.)	(2/10-11)
_____ Others (Please specify: _____)	(2/12-14)

APPENDIX C

30. What is your position title? _____ (2/15-16)
31. How many years have you been in your current position?
 _____ Years (2/17-18)
32. How many years did you work in retailing before being promoted to your current rank?
 _____ Years (2/19-20)
33. What is your age? _____ Years (2/21-22)
34. Your sex? _____ Male _____ Female (2/23)
35. What is the highest level of education you have achieved? (2/24)
- Some elementary school (1)
 Completed elementary school (2)
 2 years of high school (3)
 Completed high school (4)
 2 years of college (5)
 Completed college (4 year degree) (6)
 Some graduate work (Master's or Professional degree) (7)
 Completed graduate program (8)
36. If you went to college what was your major? (2/25-26)
- _____ Marketing (1)
 _____ Retailing (College of Business) (2)
 _____ Management (3)
 _____ Retailing/Merchandising (Home Economics/Human Ecology) (4)
 _____ Clothing and Textiles (5)
 _____ Accounting (6)
 _____ Social Science (7)
 _____ Liberal Arts (8)
 _____ Other (Please specify: _____) (9)
37. What is your gross salary (before taxes)? (2/27-31)
- | | |
|--------------------------------|-----------------------------------|
| _____ Under \$10,000 (1) | _____ \$60,001 to \$70,000 (7) |
| _____ \$10,001 to \$20,000 (2) | _____ \$70,001 to \$80,000 (8) |
| _____ \$20,001 to \$30,000 (3) | _____ \$80,001 to \$90,000 (9) |
| _____ \$30,001 to \$40,000 (4) | _____ \$90,001 to \$100,000 (10) |
| _____ \$40,001 to \$50,000 (5) | _____ \$100,001 to \$110,000 (11) |
| _____ \$50,001 to \$60,000 (6) | _____ \$110,001 and over (12) |
38. What Annual Sales Volume (at cost) are you responsible for buying? _____ (2/32-40)
- How many stores are included in that sales volume? _____ (2/41-43)
39. What is your store's Annual Sales Volume? _____ (2/44-52)
40. If you had 100 points to allocate between these reasons for buying foreign products, how many points would you give to each of these reasons. The more points you assign to a reason the more you believe in it.
- _____ Foreign products are better quality for the price. (2/53-55)
- _____ Foreign manufacturers offer a more unique merchandise selection. (2/56-58)
- _____ Higher mark-ups can be taken on imported merchandise. (2/59-61)
- _____ Exclusive merchandise/private branding. (2/62-64)
- _____ Specification buying. (2/65-67)
- _____ Other (Please specify: _____) (2/68-76)
41. What are the three major countries that account for the imported merchandise that you buy? (2/77-78)
1. _____ (2/79-80)
2. _____ (3/4-5)
3. _____
42. What countries, if any, have you personally traveled to in buying for your organization? (3/6-8)
- _____

APPENDIX D

APPENDIX D

Table 4.3 - Risk/Quality Dimensions: Factor Loadings
The First Varimax Rotation

Attributes	Factors		
	1	2	3
Imported merchandise is more likely to have flaws than domestic apparel.	.21	.69	.14
If there is something wrong with imported merchandise it is too expensive to return it, so we just absorb the losses.	.13	.16	.70
There is a lot of red tape to go through before buying imported merchandise.	.05	.04	.72
We buy our imported merchandise through a wholesaler rather than buy direct.	.05	.07	-.04*
The sizing for imported merchandise does not really correspond with U.S. sizing.	.16	.14	.06*
We have more returns of imported merchandise than we do of U.S. apparel.	.36	.48	.21
We generally have to put imported merchandise on sale earlier than we do U.S. apparel.	.13	.18	.47
Imported merchandise is generally higher quality for the price than domestic merchandise.	-.41	-.34	-.09
Quality control is not as good for imported merchandise as it is for domestic apparel.	.15	.76	.21
I am buying more imported merchandise for my department this year than I did last year.	-.42	-.17	-.04
I have found that we can take higher markups on imported merchandise than we can on domestic merchandise.	-.06	.11	.07*
Consumers frequently ask for American-made products.	.76	.18	.21
Before placing an order with a vendor, I find out whether the product is made in America or in a foreign country.	.27	.01	.03
In buying merchandise for my department, I almost always buy nationally known brand names.	.15	-.00	.06*
*Indicates that the dimension was loaded low (<.20) on all factors.			

Table 4.3 (cont'd.)

Attributes	Factors			N=68
	1	2	3	
I depend primarily on the manufacturer to supply me with high quality merchandise.	-.15	.18	.01*	
I depend primarily on my own knowledge of the product quality to assess the products I buy for my department.	-.12	.00	-.29	
I do not think that consumers care about where a product is manufactured.	-.13	-.10	-.16	

*Indicates that the dimension was loaded low (<.20) on all factors.				

APPENDIX D

Table 4.7 - Retail Buyer Type and Buyer Demographics:
Correlation Coefficients

	N=58				
	Buyer Type	Position Experience	Age	Education	Salary
Position Experience	-.22				
Age	-.29	.74			
Education	.17	-.32	-.37		
Salary	.14	-.07	.05	-.00	
Sex	-.36	.13	.30	-.38	-.18

APPENDIX D

Table 4.9 – Risk/Quality Typologies: Variations of Retail Buyer Type Groups From the Grand Mean

Typology	Grand Mean	Specialty	Department	Discount	R ²
Import Reliability	.04				
Unadjusted		.76(.72)	.25(.21)	-.77(-.81)	
Adjusted for Retail Buyer Type		.76(.72)	.25(.21)	-.77(-.81)	.08
Adjusted for Retail Buyer Type & Demographics		.66(.62)	.21(.17)	-.64(-.68)	.15

American-Made	.05				
Unadjusted		.56(.51)	.10(.05)	-.36(-.41)	
Adjusted for Retail Buyer Type		.56(.51)	.10(.05)	-.36(-.41)	.05
Adjusted for Retail Buyer Type & Demographics		.52(.47)	.10(.05)	-.33(-.38)	.12

APPENDIX D

Table 4.16 - Buy American Campaign Typologies: Variations of Retail Buyer Type Groups From the Grand Mean

Typology	Grand Mean	Specialty	Department	Discount	R ²
N=58					
Potential Promotions	-.05				
Unadjusted		.90(.95)	-.23(-.18)	-.39(-.34)	
Adjusted for Retail Buyer Type		.90(.95)	-.23(-.18)	-.39(-.34)	.03
Adjusted for Retail Buyer Type & Demographics		.06(.11)	-.03(.02)	-.15(-.10)	.22

Active Promotions	-.02				
Unadjusted		-.14(-.12)	-.15(-.13)	.26(.28)	
Adjusted for Retail Buyer Type		-.14(-.12)	-.15(-.13)	.26(.28)	.02
Adjusted for Retail Buyer Type & Demographics		-.66(-.64)	-.04(-.02)	.44(.46)	.18

APPENDIX D

Table 4.21 - Reasons for Purchasing Imported Apparel:
Variations of Retail Buyer Type Groups From the Grand Mean

Reason	Grand Mean	Specialty	Department	Discount	R ²
N=69					
Foreign products are better quality for the price.	31.12				
Unadjusted		1.38	-1.05	.46	
Adjusted for Retail Buyer Type		1.38	-1.05	.46	.00
Adjusted for Retail Buyer Type & Demographics		3.43	-1.56	-.63	.02
Foreign manufacturers offer a more unique merchandise selection.	9.55				
Unadjusted		.56	-1.27	1.61	
Adjusted for Retail Buyer Type		.56	-1.27	1.61	.00
Adjusted for Retail Buyer Type & Demographics		.36	-1.27	1.80	.05
Higher mark-ups can be taken on imported merchandise.	27.48				
Unadjusted		-12.03	2.71	6.84	
Adjusted for Retail Buyer Type		-12.03	2.71	6.84	.13
Adjusted for Retail Buyer Type & Demographics		-11.50	2.56	6.58	.15
Exclusive merchandise/private branding.	15.65				
Unadjusted		3.74	2.47	-7.70	
Adjusted for Retail Buyer Type		3.74	2.47	-7.70	.10
Adjusted for Retail Buyer Type & Demographics		7.01	1.69	-9.49	.17
Specification buying.	5.46				
Unadjusted		-1.80	.04	1.64	
Adjusted for Retail Buyer Type		-1.80	.04	1.64	.01
Adjusted for Retail Buyer Type & Demographics		-1.85	.02	1.71	.02

APPENDIX D

Table 4.24 - Buy American Campaign Typologies by Reasons for Purchasing Imported Apparel:
Stepwise Regression

Typology	DF	Sum of Squares	Mean Square	F	Significance of F	R ²
Potential Promotability						
Quality for the price Residual	1 13	11.18 51.11	11.18 3.93	2.84	.12	.18
Unique merchandise Residual	2 12	15.56 46.73	7.78 3.89	2.00	.18	.25
Exclusive merchandise/ private branding Residual	3 11	17.18 45.11	5.73 4.10	1.40	.30	.28
Specification buying Residual	4 10	18.43 43.87	4.61 4.39	1.05	.43	.30
High mark-ups Residual	5 9	25.58 36.71	5.12 4.08	1.25	.36	.41

Table 4.24 (cont'd)

Typology	DF	Sum of Squares	Mean Square	F	Significance of F	R ²	N=15
Active Promotions							
Quality for the price Residual	1 13	5.00 16.20	5.00 1.25	4.01	.07	.24	
Higher mark-ups Residual	2 12	6.07 15.13	3.04 1.26	2.41	.13	.29	
Specification buying Residual	3 11	7.50 13.70	2.50 1.25	2.01	.17	.35	
Exclusive merchandise/ private branding Residual	4 10	8.16 13.04	2.04 1.30	1.56	.26	.39	104
Unique merchandise Residual	5 9	9.29 11.91	1.86 1.32	1.40	.31	.44	

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