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Communicating Luxury to an International Audience: The Case of Scottish Cashmere

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Communicating Luxury to an International Audience: The Case of Scottish Cashmere

Cover Page Footnote

The author would like to thank the editor and two anonymous reviewers for their comments on the initial draft of this article.

INTRODUCTION

This study focuses on communications in the Scottish cashmere industry. Cashmere production has a long tradition in Scotland, and Scotland has long been viewed as a worldwide centre of excellence for the design and manufacture of cashmere garments,¹ with a significant proportion of Scottish cashmere production being exported overseas (ECOTEC 2007). Over recent years, in response to increased global competition from low cost producer nations such as China, the industry has reinforced its strategy of targeting the luxury market, moving further towards “higher value, exclusive niche markets and specialised production” (ECOTEC 2007:25). In terms of branding and marketing, this brings with it certain challenges:

Scottish textiles companies targeting the luxury market face the same challenge as global luxury brands in terms of understanding and aligning their brands with new consumer values of sustainability and provenance and away from the conspicuous consumption of previous years. (Scottish Enterprise 2010: 4).

This study represents an attempt to establish how Scottish cashmere companies are responding to this challenge. In other words, how are Scottish cashmere companies promoting themselves in an increasingly competitive global marketplace and what are the values they are putting forward as inherent to their brands? Although numerous reports have been published which offer advice to the textiles industry in Scotland on issues such as market positioning, branding and marketing (e.g. ECOTEC 2007; Scottish Textiles 2007; Scottish Enterprise 2010), there has been little, if any, research which has examined the actual materials used by Scottish textile companies, including those in the cashmere sector, to communicate with consumers about themselves and their products. Hamilton (2010) touches upon such issues in her study of corporate identity across a range of premium and luxury goods industries in Scotland, but she does not look in detail at the cashmere industry, nor does she focus on written communications. This study will seek to address this gap by studying the company websites of Scottish cashmere companies with a view to highlighting how Scottish cashmere is promoted to consumers across the world. The specific aims of the study are threefold: firstly, to shed light on those attributes of Scottish cashmere that companies seek to emphasise in their website communications; secondly, to show how those attributes are communicated textually; and thirdly, to establish whether these attributes correspond to what are identified in the literature as typical features of luxury products or whether they are atypical, and whether values which have become increasingly important in recent years, such as provenance and sustainability as mentioned above, feature at all, and, if so, how. The methodological approach adopted involves a detailed thematic analysis of website texts, the themes identified providing insights into those attributes that companies seek to project onto themselves and Scottish cashmere as a product, in other words aspects of the image they seek to create and project to consumers across the world. In terms of theoretical support, the study will draw on existing work on luxury branding and marketing.

¹ It was from Scotland that Coco Chanel and Jean Patou sourced their cashmere garments in the 1920s and leading international fashion houses such as Chanel and Hermès are still amongst the clients of cashmere companies based in Scotland (Hamilton 2010: 269).

The findings of this study will complement existing work on other industries, including international designer fashion (e.g. Bruce and Kratz 2007; Okonkwo 2007; Fionda and Moore 2009) and the luxury wine industry (e.g. Beverland 2004, 2005a, 2005b, 2006), and in doing so will contribute to our understanding of image and marketing communications in the luxury textiles industry – a sector which has not yet been covered in the literature – and of luxury products more generally. In addition, the study could provide an indication more broadly of how company and product image could be investigated through analysis of corporate website communications designed for international consumer audiences. Finally, and more practically, the findings may be of significance to the Scottish cashmere industry itself: if / where the attributes of Scottish cashmere currently being highlighted in website communications do not tally with those that research suggests are most attractive to international consumers today, there may be scope to suggest changes.

The remainder of the article is organised as follows. The next section will review relevant literature in relation to luxury branding and marketing communications, including models of luxury. This will be followed by an outline of the research methods and dataset. The results of the analysis will then be discussed, followed by conclusions and suggestions for further research in the final section.

THEORETICAL BACKGROUND

In this section we will discuss various models of luxury, in an attempt to define what is meant by luxury and to explore those dimensions of luxury which are important in branding and brand communications. This will allow us to identify aspects of luxury covered in previous research which may be relevant to the image of Scottish cashmere and to establish a framework for the data analysis. The first section will discuss studies of luxury generally, while the second and third sections will go on to discuss product integrity and relationship to place respectively, which will be useful concepts in the data analysis later on.

Defining luxury

A number of attempts have been made in earlier research to define the characteristics of luxury products and particularly luxury fashion (e.g. Dubois et al. 2001; Jackson 2004; Moore and Birtwistle 2005; Bruce and Kratz 2007; Okonkwo 2007). Following a review of eight models of luxury branding, including a number of those mentioned above (Nueño and Quelch 1998; Arnault 2000, cited in Kapferer 2008; Morgan Stanley Dean Witter 2000, cited in Jackson 2004; Phau and Prendergast 2000; Alleres 2003; Moore and Birtwistle 2005; Okonkwo 2007), Fionda and Moore conclude that "From a product perspective, luxury brands are frequently defined in terms of their excellent quality, high transaction value, distinctiveness, exclusivity and craftsmanship" (2009: 349). However, they also note that none of the models of luxury fashion presented in the extant literature is based on empirical research. They therefore set about filling this gap through a case study of 12 British luxury fashion companies. From their research they identify nine components as inherent to the creation of the luxury fashion brand, namely:

clear brand identity; luxury communications strategy; product integrity; brand signature; prestige price; exclusivity; luxury heritage; environment and consumption experience; and luxury culture. Their model and the others mentioned above provide an indication of some of the key features of global luxury fashion brands. These brands (e.g. Burberry, Dior, Gucci, LVMH, Prada etc.) are world-famous, high-profile brands managed by large multinational groups which invest in innovative and seasonal new product development, the appointment of a renowned fashion designer as a creative director, directly owned stores and flagship experience, and Milan, London or New York fashion shows (Fionda and Moore 2009: 360). Despite falling broadly into the category of luxury fashion and despite being an internationally-focused industry (in 2007 almost two out of three cashmere companies operated in international markets and, “two thirds [of these] (67%) obtained more than 50 per cent of their total sales in international markets” (ECOTEC 2007: 11), the Scottish cashmere industry is not on the same scale as these luxury fashion houses, whether in terms of size, financial resources (see ECOTEC 2007), or profile. While some of the components of luxury fashion brands will be shown to be relevant in the context of Scottish cashmere, notably product integrity, the difference in scale means that many of the other components of the models presented in the luxury fashion branding literature are of limited relevance to this study.

Research in other industries which can be used to complement that in luxury fashion includes work on the luxury wine industry as conducted by Beverland (e.g. 2004, 2005a, 2005b, 2006) and Beverland and Luxton (2005). Luxury wineries have a number of features in common with Scottish cashmere companies: they vary greatly in size and are located in various countries across the world, but they are all described as specialists which have an established history and which face increased competitive threats (Beverland 2005b). Scottish cashmere companies are similar: they also tend to be long-established (ECOTEC 2007: 6) and to be specialise in cashmere production alone, or cashmere in addition to a small number of other luxury textiles. Where the wineries studied by Beverland face increased competition from new wineries opening up, in the case of Scottish cashmere, competition has been fierce from firms based in China offering cheaper versions of cashmere garments and also at the top end of the market from Italian firms. Perhaps partly for these reasons the model of luxury Beverland (2004) proposes is useful for analysing the Scottish cashmere data studied here. The components of his model are sixfold: product integrity, value driven emergence, culture, history, marketing, and endorsements. While each of these components is important, Beverland (2004: 460) argues that the relative importance of each one will vary from one firm to another. Product integrity, which was also noted above to be one of Fionda and Moore's (2009) nine components of luxury fashion brands, will be shown to be a key theme in the data analysed in this study and will therefore be further discussed in the following section.

Product integrity

Product integrity consists of several sub-categories including 'product quality', 'attention to detail', 'craftsmanship', 'product / production integrity' and 'credibility'. 'Production integrity' and 'attention to detail' include craft production methods and are often associated with heritage and tradition. Beverland describes luxury wineries as being "fanatical about detail" (2004:

453), often using hand harvesting techniques; one winery he studied even stated that it harvested grapes by the grape rather than the bunch. As part of their commitment to product quality and integrity, the wineries all kept the volume of their products low, "as vine yield has a direct impact on final wine quality... and perceived scarcity was believed to be important to positioning" (2004: 460). In the fashion industry comparable practices include handcrafting garments and/or hand finishing, and specialising in short production runs and limited collections. Fionda and Moore also note that, as part of their commitment to product integrity, fashion companies invest in 'creativity and innovation' (2009: 357). Credibility is viewed as stemming from this emphasis on quality.

Relationship to place

One further potentially interesting component, which appears not to have been included explicitly in existing models of luxury, but which will be examined in the data analysis is 'relationship to place'. Attention will be paid to place in this study for two main reasons: firstly, the geographically-specific nature of the Scottish cashmere industry would suggest that place may be significant in the data; and secondly, advice has previously been issued to the industry by public bodies in Scotland (e.g. ECOTEC 2007; Scottish Enterprise 2010) that 'provenance' is a new consumer value that the industry needs to take on board and that the Scottish dimension should therefore be an important part of its marketing strategy. The question of how and whether place features in the data is therefore a valid one: do Scottish companies use Scotland as part of their communication strategy? If so, how?

Beverland (2005b) and Beverland and Luxton (2005) suggest that place is important to sincerity of story and, by extension, an image of authenticity: in Beverland's study "relationship to place reinforced a point of uniqueness, granting authenticity to the product" (2005b: 1018). What they term 'relationship to place' or 'place as a referent' has been discussed by others in terms of 'provenance' (e.g. Anholt 2002) or Country of Origin (e.g. Hamilton 2010). Recognition of the importance of place and growing interest on the part of consumers worldwide in "the story behind their products", including "where the product was made" (Scottish Enterprise 2010: 22) has led industry bodies in Scotland to argue for more use of Scotland as a selling point for Scottish cashmere and to encourage cashmere companies "to 'reinvent' an authentic concept of luxury, embedding the new consumer values of sustainability and provenance which could stimulate renewed demand as a result" (Scottish Enterprise 2010: 7). Hamilton has looked at such issues in the Scottish business context from a Country of Origin (COO) perspective and proposes that "place; history and heritage; people; and products; are the key sources which companies use to convey a distinctive COO identity through the use of place names, socio-geographic images and symbols" (Hamilton 2010: 8). In this study attention will therefore be paid to issues of place as a potentially important aspect of the image of Scottish cashmere.

Having outlined the relevant issues in relation to luxury and presented theoretical concepts which will be important in the study, in the following section we will present the data and methods, before moving on to a discussion of the results.

RESEARCH METHODS AND DATA

Data collection

The first step in the data collection process was to access the website of the Scottish Cashmere Club, the trade association representing the Scottish cashmere industry, in order to identify those companies operating in the industry in Scotland. At the time of data collection (July 2011), the organisation had 10 members with active websites.² These companies have an established history and are entirely, or almost entirely, focused on cashmere production.³ The majority are engaged in the manufacture of cashmere garments and accessories, and mostly this involves knitting (sometimes also weaving). Two companies (Todd & Duncan, Hinchliffe) are spinners i.e. they spin the raw cashmere into yarn and supply it to manufacturers. In geographical terms, cashmere mills are concentrated in certain areas, most notably in the south of Scotland, in the Scottish Borders, in and around the town of Hawick which is famous for its association with textiles and especially cashmere production. All of the Cashmere Club's members' corporate websites were accessed and included in the dataset. Additional web searches were carried out to identify other cashmere producers for inclusion in the dataset. A number of other companies were found. Some of these are small design companies with no or minimal web presence and were therefore not added to the dataset. Two others (Barrie, Shorts of Hawick) were added at this stage, however, since their profile is similar to that of the Cashmere Club's members: they are also established cashmere producers (Barrie was established at the turn of the 20th century, Shorts of Hawick has been in operation for more than 25 years) and both focus exclusively on cashmere production. Information about the companies is given in Table 1 in the Appendix.

Description of the dataset

Although the websites for the companies vary in terms of their content and their organisation, there are a number of shared features. The most common sections on the sites include a company profile, an outline of the company's history and development, a presentation of current and past collections, the processes involved in manufacturing garments, and contact information. A number of sites also include company news and list retail outlets / stockists across the world and/or relevant international contacts. All of the websites use images of different types (e.g. photographs, pictures, drawings of designs for garments, etc.) to complement the textual content.

In terms of function, all of the texts in the dataset, regardless of the source from which they are taken, are hybrid, combining an informative function with a promotional function. This reflects Pollach's point that companies use their websites to construct "favourable images of themselves"

² According to the Scottish Cashmere Club's website, it had 12 members but two of these members had ceased trading without the association's website having been updated.

³ A number (e.g. Johnstons of Elgin, Lochcarron) also produce other luxury textiles; however, cashmere constitutes a large proportion of their activity and they identify themselves as cashmere producers through their membership of the Scottish Cashmere Club.

(2005: 288). Corporate websites, while containing a number of sub-genres (corporate profiles, corporate histories etc.), are therefore similar to company brochures which Bhatia (2004) describes as a 'mixed genre' as a result of this hybridity of function. In many ways the corporate website is an online version of the corporate brochure.

The audience of the websites is a broad and non-specific group: anybody can access the websites and it is certain that the audience is international in nature, given that exports are extremely important to the Scottish cashmere industry, the largest export markets being the US, Italy, France and Japan (ECOTEC 2007: 11). In this respect there are similarities between the data examined here and the Italian, Australian and New Zealand wine-related texts analysed by Poncini who also notes that the audience is likely to be an international one, particularly where materials are in English:

in many cases English-language materials are prepared by companies or organisations for general international use, without a single national market – or reader - in mind. The potential for multiple audiences, often located around the world, is also the case for many materials available on the Internet, where businesses, investors and consumers have access to most of the same websites. (2004: 174)

Interestingly, despite the importance of non-English-speaking markets to the Scottish cashmere industry, all materials identified to date are in English only.

Methods of data analysis

The data was analysed in two main stages. The first stage involved a preliminary analysis of all texts from all websites in an attempt to identify the main themes covered, on the basis that these themes would provide an indication of the key attributes the firms seek to present as components of their image. Attention was also paid to the images found on the companies' websites; these were considered in relation to the accompanying text. A list of themes emerged as this part of the analysis proceeded, and a basic count was taken of the number of websites on which each of the themes featured. This was done manually by the author. The second stage involved a detailed qualitative analysis of the texts collected from the websites of five companies, namely Begg Scotland, Johnstons of Elgin, Scott & Charters, The Hawick Cashmere Company, and William Lockie. These companies were chosen since they have the websites with most textual content. At this stage the aim was to explore in detail the themes identified in the first part of the analysis: to examine how the themes are developed and expressed in the data, what sub-themes are referred to, and whether / how the themes are linked. Again the analysis was carried out manually by the author. The themes which emerged from the analysis will be presented, discussed and exemplified below.

RESULTS

Summary of findings

The main themes which emerged from the data analysis are:

- product quality (features on all websites);
- heritage and tradition (features on 12 out of 13 websites);

- craftsmanship (features on 11 out of 13 websites);
- Scotland (features on 10 out of 13 websites);
- innovation (features on 10 out of 13 websites);
- the Scottish cashmere industry as a world leader (features on 7 out of 13 websites).

In some cases these themes may be discussed in dedicated sections on the websites, but sections dealing with these topics are often not discrete. Rather, several themes may be covered in the same section: issues related to craftsmanship, for example, pervade many sections of the websites, including sections detailing the various stages in the production process; similarly, product quality is often one of the main threads running through every section of a company website. There are clear links between these themes and the characteristics of global luxury brands as discussed above. Product quality, craftsmanship and innovation are all aspects of product integrity; the Scottish cashmere industry as a world leader relates to credibility, also part of product integrity. Heritage and tradition are included under 'heritage' or 'history' in models of luxury (e.g. see Fionda and Moore 2009). Craftsmanship is also relevant to heritage and history too, however, since many of the craft skills mentioned are traditional skills which have been employed throughout the history of the firm; craftsmanship would seem, therefore, to straddle categories. The final theme in the data is Scotland and the provenance of Scottish cashmere which we will look at under 'relationship to place', suggested above as being of possible significance given the nature of the data. Overall then, the majority of the themes in the data relate to product integrity but relationship to place is also a noteworthy theme. Sustainability, noted above as of increasing interest to consumers, does not feature in the data at all.

In the following discussion some of the themes found will be explored in detail, in order to show how they are developed and expressed by Scottish cashmere companies in their website communications.

DISCUSSION

This section will be split into two halves. The first will look at product integrity and related sub-themes; the second will focus on relationship to place. Although heritage and tradition will not be discussed *per se*, they may be referred to briefly where relevant in discussion of the other themes.

Product integrity

Every one of the websites examined in this study emphasises the high quality of Scottish cashmere. References to product quality involve recurring descriptions of Scottish cashmere as 'the 'softest' / 'finest', 'most luxurious' cashmere, 'the finest quality', etc. Quality is presented partly as the result of attention to detail at every stage of the production process, from the initial selection of the raw cashmere fibre, to the spinning process, the various stages involved in the creation of a garment, and the final checks. For instance, considerable emphasis is placed in the texts on the quality of the raw fibre, as in examples 1 and 2, and on the technical requirements it has to fulfil, as in examples 3-4:

1. We buy only the highest quality raw cashmere...

2. our cloth is woven from the finest fibres available...
3. Fibre is double tested to make sure it complies with our exacting standards for colour, length, thickness and purity...
4. Only a small fraction of the harvested fibre is accepted for processing – fibres that are a minimum of 34mm in length and a maximum thickness of 16.5 microns.

The integrity of the production process is also key to product quality and is based on the craftsmanship of those who work in the cashmere mills. As reflected in examples 5-7, employees are described as being highly skilled, the skills they employ on a daily basis resulting from the traditions and heritage associated with the industry: skills have been honed over decades, if not centuries, and passed down over generations.

5. OUR SKILLS have been passed down through the generations since 1874...⁴
6. Many families contain two or three generations who work in the industry, passing down an almost instinctive understanding of the materials and traditional skills necessary to produce the best.
7. We are especially concerned with the preservation of traditional craft skills.

This is a key factor which is presented as differentiating cashmere garments produced in Scotland from those now being manufactured in low-cost producer countries like China, which are universally recognised as of much poorer quality.⁵ Many of the skills referred to in the data are explicitly noted to involve processes carried out by hand:

8. Our delicate hand finishing gives each garment a finesse and sense of quality that can't be matched...
9. our cloth is ... hand-finished with natural teasels for a supple, almost ethereal feel.

Such references emphasise attention to detail and contribute to a positive image of Scottish manufacturers as specialised, skilled and driven by a concern for quality, rather than mass production.

A further key factor characterising the production process and contributing to product quality is innovation and the use of new technologies. Although handcrafting and the use of new technologies might seem to be contradictory, in fact a common theme in the data, as illustrated in examples 10-11, is that Scottish cashmere production involves an harmonious union of traditional skills and techniques on the one hand and technological innovation on the other, and that it is this combination of old and new which leads to the high levels of quality noted above.

⁴ In a number of the examples (i.e. 5, 11-13, 23, 25-26), capital letters are used. This is because capital letters are used in the data itself and so the examples as they are presented here reflect what is found in the texts on the company websites.

⁵ It should, however, be noted that the raw cashmere fibre is imported to Scotland from China and Mongolia.

10. We marry together the best traditional skills with the latest technology, creating beautiful cashmere garments that are exquisite to touch and wear...
11. HAWICK CASHMERE utilise both the latest technologies and the vast wealth of experience of their workforce to achieve the best possible results.

It is on the basis of the high quality of Scottish cashmere products and the integrity of the production process, resulting from the range of factors discussed above, that Scottish cashmere companies are presented not only as competing favourably on an international scale but as world leaders in the luxury cashmere sector. This can be seen in examples 12-13:

12. THE BEST OF SCOTLAND... THE BEST IN THE WORLD
13. As a privately owned company HAWICK CASHMERE take pride in protecting their reputation as one of the finest producers of cashmere in the world.

Evidence provided of their leading position includes collaborations with top international designers and the fact that they produce for leading international fashion houses, as in the following examples:

14. We also produce bespoke items for some of the biggest names in the fashion industry...
15. Today, Begg Scotland creates some of the world's finest cashmere accessories, garments that routinely grace the world's catwalks and leading boutiques.
16. ...as well as own collections, each year Johnston of Elgin produces cashmere for the world's biggest luxury brands and fashion houses.

Such examples, which testify to the quality and desirability of Scottish cashmere, serve as an endorsement of Scottish cashmere companies and help create an image of credibility. Endorsement by the Scottish Cashmere Club through the right to use its Cashmere Made in Scotland® trade mark also lends credibility:

17. Cashmere Made In Scotland® delivers the highest quality cashmere in the world.
18. Quality that is Guaranteed by the Cashmere Made in Scotland® label.

The emphasis on product quality in the data is unsurprising given that, as noted above, excellent quality is frequently cited as a key element of luxury goods. Furthermore, Hamilton found in her study of premium / luxury companies across a range of sectors in Scotland that product quality “was clearly considered to be the most important dimension to characterise the essence of the brands of participating companies” (2010: 264). From the data analysis it is clear that it is not just the quality of the final product which is underscored, however; it is the integrity of the entire production process. This leads Scottish cashmere companies to emphasise attention to detail at all stages, craftsmanship, and the use of innovative techniques and new technologies. The combination of these factors lends credibility to the Scottish cashmere industry.

Relationship to place

The raw cashmere fibre used to manufacture Scottish cashmere garments comes from the Far East, principally from cashmere goats farmed in Mongolia,⁶ but this is rarely acknowledged by Scottish companies on their websites. Rather, cashmere garments manufactured in Scotland are presented as 'Scottish' and are labelled and marketed as such. Indeed, on one website in the dataset the Scottish Borders is described as the 'birthplace of cashmere garments'; this website and the vast majority of the others examined makes no mention at all of the geographical source of the raw cashmere fibre. In the data considerable emphasis is placed on the Scottish identity of both the companies and the products. "Scottishness" is reflected in, and created by, references to places in Scotland and to the Scottish landscape.

Place references

Most of the companies in the dataset (see Appendix 1) have Scotland or the town in which they are based mentioned in their name, e.g. Begg Scotland, Johnstons of Elgin, Scott & Charters (Hawick), and The Hawick Cashmere Company (which also refers to itself simply as Hawick Cashmere), and/or their logo, e.g. 'William Lockie handcrafted in Scotland since 1874'. The use of place names in company names and/or logos suggests that Scottish cashmere companies view their geographical roots as an important aspect of their identity and of the image they wish to project to their (international) audience.

In website texts general statements are made about links between Scotland and cashmere, as in example 19 below and Scotland is referred to in the Cashmere Made in Scotland® trademark of the Scottish Cashmere Club.

19. Scotland has been synonymous with the highest quality cashmere...

Also very frequent are references to towns or regions, principally in descriptions of the locations of companies and their mills (examples 20-22):

20. For over 50 years the Charters family have been making very special knitwear in the Scottish Border town of Hawick.
21. We're at the heart of the renowned Scottish knitwear and cashmere industry, located in Hawick on the banks of the River Teviot, deep in the Scottish Borders.
22. Johnstons of Elgin is founded by Alexander Johnston on the banks of the River Lossie, Newmill, Elgin.

The Scottish Borders, in the south of the country, especially the area around the town of Hawick, is a rural area which has long been associated with the textiles / knitwear industry on account of sheep farming in the area and natural assets such as the rivers used to power the mills; consequently, it receives repeated mention. References to places such as these firmly anchor the companies and their products to one or two geographical locations (the companies in the dataset have at most two sites), thereby allowing the consumer to identify exactly where the products are made.

⁶ <http://scottishacademyoffashion.com/network/companies/Scottish-Cashmere-Club>, accessed 16 January 2012.

The Scottish landscape

The Scottish landscape is presented in the data as a source of inspiration in the design and production of Scottish cashmere; furthermore, Scottish cashmere is portrayed as sharing certain qualities with the environment in which it is produced, as can be seen in examples 23-24:

23. OUR SCOTTISH BORDERS is the birthplace of cashmere garments and reflects the natural style of much of our collection. Inspiring hills and glimmering lochs span 1,800 square miles between England and the rest of Scotland.
24. From hand woven Paisley shawls in that eponymous town to the world's finest cashmere accessories. All inspired by the land and shore of this remarkable country.

Images are also found on the websites of the Scottish landscape, supporting the references in the texts. The colours of the landscape are frequently singled out for mention: as example 25 shows, they are presented as the colours of cashmere, thereby leading to a fusion of the product and the setting in which it is produced:

25. OUR LANDSCAPE inspires our kaleidoscope of colours... from the zingy greens of spring to the softest pinks and lilacs of a Highland sky. Our garments can hold every conceivable hue, with an intensity and clarity that is unique to cashmere.

A similar tendency has previously been noted in relation to Harris tweed (e.g. Platman 2011). One feature of the landscape which is particularly important in cashmere production are the rivers, and in the data references are made to a number of qualities of Scottish cashmere (softness, sheen, colour etc.) which, it is claimed, owe much to the softness and purity of the water used in the mills for washing. This is illustrated in examples 26 and 27:

26. OUR WATER is one of the secrets of our success. Astonishingly pure, it's the softest in the world. We use it at strategic points in the manufacturing process so that the cashmere fibres release their greatest lustre and softness.
27. Given clarity and depth of colour by the softest, purest Scottish water, our cloth is woven from the finest fibres available...

Previous research on marketing materials for the Scottish food industry has also noted a tendency to focus on features of the landscape: according to Burnett and Danson, "our sense of Scottish quality meat and fish products being "fresh" and "natural" is reinforced by the judicious use of marketing images and rural associations with wilderness and the quality of our natural elements (e.g. the waters of Scotland, including rivers, lochs, etc.)" (2004: 394). A Scottish Government report on the Scottish food and drinks industry published several years later made a similar point, namely that Scottish references used in the presentation of products suggest "natural, fresh and pure associations with the Scottish landscape" ((Scottish Government 2009: 38, cited in Hamilton 2010: 87)); in other words, the attributes of 'natural', 'fresh' and 'pure' are presented as characterising the (food) products advertised. The

evidence from this study is that attributes of the physical setting in which Scottish cashmere is produced, including purity, naturalness, and colour, are shared by Scottish cashmere and thus become part of the image of Scottish cashmere which is projected in the data. This link between product and the physical environment in which it is produced is important in the data. Poncini (2007) has also commented on descriptions of the landscape in website texts for New World wineries which evaluate the region and country as beautiful; however, the purpose in her data is to build awareness and to promote visitor attractions, not to establish a comparison between wine and the setting in which it is made.

A further point to note in relation to the portrayal of Scotland in the data is that it is overwhelmingly Scotland's *rural* environment which receives attention, both in the textual content and in the images used. This supports the findings of Burnett and Danson that "Scottishness in "brand" terms" has been "skewed" in favour of "rural" iconography." (2004: 392). Indeed, the focus on rural Scotland suggests that Scottish cashmere is a 'rural product'. However, rurality may not be viewed so positively by all cultural groups, including some target markets, and consequently a shift away from the focus on rurality may be required if Scottish brands are to achieve success in overseas markets. Consumer research has shown, for instance, that to appeal to some niche markets in the US, "Scottish products must be re-orientated with urban rather than rural associations" (Scottish Enterprise 2010: 11), while in Russia consumers have responded negatively to Scottish branding "where this evokes traditional, 'old world' countryside" since Russians "associate this kind of branding with the era of austerity in the old USSR" (Scottish Enterprise 2010: 12). The only exceptions to the focus on rurality in the data can be found in the electronic brochure on the William Lockie website where analogies are created between cashmere and the Forth Rail Bridge (presented as examples of Scottish technical expertise) and between cashmere and the city of Edinburgh (projected as symbols of the balance between 'all things traditional and contemporary'). These examples are insightful precisely because they are atypical, involving an industrial symbol and a symbol of urbanisation respectively; as exceptions which prove the rule, they merely serve to underscore the typicality of the references, whether textual or pictorial, to rurality.

To sum up in relation to place, considerable emphasis is placed in the data on place and specifically Scotland, and this manifests itself through place names and representations of the Scottish landscape. As noted above, place has not featured prominently in other models of luxury; the evidence from this study may suggest that it should be included as a component. However, it is true that the relative importance of place will vary from one industry to another and it may be, therefore, that in the Scottish cashmere industry place is especially important; as Hamilton argues, "Cashmere knitwear and malt whisky are particularly associated with Scotland, thus for these products, COO [Country of Origin] effects are likely to be strong (Heslop and Papadopoulos 1993)" (2010: 118). This may suggest that Scottish cashmere companies are more likely than companies in other sectors to promote Scotland as a key part of their image in their global marketing communications.

SUMMARY AND CONCLUSIONS

This article sought to investigate how Scottish cashmere companies are promoting themselves and their products to international consumers via company websites, and specifically to explore the image of Scottish cashmere which is projected. This was done through a thematic analysis of website texts which has pointed to those attributes of Scottish cashmere which are highlighted by companies. Themes identified as prominent in the data include product quality, heritage and tradition, craftsmanship, relationship to place, innovation, and the Scottish cashmere industry as a world leader. These appear to be the most important attributes of the image Scottish cashmere companies project via their company websites. All were shown to be communicated by means of a number of sub-themes and specific textual references. It was also shown that most of these themes relate to the notion of 'product integrity'; it is therefore this component of luxury brands that receives most emphasis in the data. Heritage and tradition are also significant, as may be expected for such an established industry, although these were not examined in any detail here; given increasing interest in heritage branding (see e.g. Urde et al 2007), there may be some mileage in conducting further research on this aspect. Product integrity, heritage and tradition are all frequently cited as typical features of luxury brands (see above).

The other main focus in the data in this study is Scotland, suggesting that relationship to place or 'provenance' is viewed by Scottish cashmere companies as a key component of their brands.⁷ If studies of other luxury sectors were also to identify relationship to place as an important product attribute, this could justifiably be included in models of luxury as a component of luxury brands: while place has been mentioned in the secondary literature, it has not systematically featured as a component in models of luxury brands to date. What is perhaps especially interesting in relation to place in the data examined here is the way in which it manifests itself textually, particularly through references to the physical geography of Scotland. No other studies of luxury products from other countries around the world appear to have pointed to explicit comparisons between those products and features of the landscape. Studies from other industries could usefully establish whether and how place, including physical landscape, are used in global business and marketing communications. Complementary to text-based studies would be multimodal studies exploring further the use of images and the interaction between the textual and visual (also potentially audio) elements (e.g. textual references to colour supported by selective use of images.)

From the study it has also emerged that some issues which feature prominently in existing literature on luxury goods are not mentioned on Scottish cashmere company websites. This is true of price, for example, which receives no mention at all, although this is probably unsurprising. However, what *is* perhaps surprising is that issues of sustainability are not mentioned by Scottish cashmere companies, despite the integrity of the cashmere production process as discussed above, and despite repeated advice from Scottish bodies that ethical and sustainable practices could / should be used as a potential selling point for Scottish cashmere in view of increasing interest amongst

⁷ It should be noted, however, that it is from Scotland alone that Scottish cashmere products are presented as originating – the fact that the raw fibre comes from the Far East is generally overlooked.

consumers across the world in so-called 'responsible luxury' (Dasgupta 2009). It may be that companies have not yet begun to address the ethical dimension of their business in their marketing communications, including their company website, but that this will change over time. There may therefore be some interest in diachronic studies of image in the Scottish cashmere industry and luxury industries more broadly to examine how image and its constituent attributes evolve over time.

APPENDIX

Name of company/ Organisation	Brief description
Barrie	Knitter located in Hawick in the Scottish Borders. Established ca. 1900.
Begg Scotland	Knitter located in Ayr, south west Scotland. Established in the second half of the 19 th century.
Clan Douglas	Knitter located in Hawick in the Scottish Borders. Date of establishment unknown.
Hawick Knitwear	Knitter located in Hawick in the Scottish Borders. Date of establishment unknown.
Johnstons of Elgin	The only company in Scotland to produce finished garments from the raw material i.e. to cover the whole process. Yarn is spun in the company's mill in Elgin, in the Highlands, and garments knitted in the company's second mill in Hawick in the Scottish Borders. Established 1797.
Lohcarron of Scotland	Manufacturer of fabrics (especially tartans) and cashmere knitter located in Selkirk in the Scottish Borders. Established 1947.
Scott & Charters (Hawick)	Knitter located in Hawick in the Scottish Borders. Established in the middle of the 20 th century.
The Hawick Cashmere Company	Knitter located in Hawick in the Scottish Borders. Established 1874.
Scottish Cashmere Club	Trade association for the Scottish cashmere industry and its members. Currently has 10 members. Established 1998.
Shorts of Hawick	Knitter located in Hawick in the Scottish Borders. Established in the 1980s.
Todd & Duncan	Spinner located in Kinross in Central Scotland. Established 1867.

William Lockie	Knitter located in Hawick in the Scottish Borders. Established 1874.
Z. Hinchliffe	Spinner located in Ayr in south west Scotland. Established 1766.

Table 1: Companies represented in the dataset

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