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Making sense of fashion involvement among Malaysian Gen Y and its implications

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ABSTRACT

In keeping pace with globalization of the fashion retail industry, fashion retailers are expanding aggressively across Asia. Malaysia is no exception with clothing market demand expected to double from USD3.6 million in 2011 to USD7 million in 2018. New foreign retail brands have mushroomed to compete alongside local brands to cater to the fashionable aspired yet unique Gen Y. This study dwells into determinants of fashion involvement of Malaysian Gen Y. They appear to have an insatiable appetite for the quick and trendy lines although less interested in logo-centric clothes and want unbranded goods, dressing for self-identity. They have blur distinctions as compared to earlier generations where dressing is seen as a way to fit in. Given their blurring fashion identity, local fashion retailers find it increasingly difficult to understand this ever-evolving customer base. Methodology involved mixed methods with storefront observations and interviews with top local fashion retailer. Using mall intercept approach, Gen Y were sampled via survey questionnaires. Findings were contrary to other studies. Fashion knowledge was the only dominant and significant factor. Local brand confidence, fashion shopping style and patronage behaviour were non-significant predictors. Implications on fashion retailing and theoretical implication on fashion involvement are debated.

1. Background of the study

In keeping pace with globalization of the fashion retail industry, fashion houses are expanding aggressively across Asia and Malaysia is no exception. The Malaysian fashion retail industry has shown itself to be dynamic, extremely resilient, and always following the latest trend as well as the evolving demand. The emerging size of the middle class and rising income that is involved in fashion activities have provided widespread growth opportunities. Top new international fashion brands like Zara (France), H&M (Sweden), Monki (Sweden), Gap and Aeropostale (US) and Muji and Uniqlo (Japan) just to name a

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few, have recently entered the Malaysian market with prospects of healthy competition and to take advantage of untapped market opportunities.

Malaysia's clothing market demand is expected to double from USD3.6 million in 2011 to USD7 million in 2018 (Economic Intelligence Unit). Faced with short product life cycle of fashion clothing along with consumers frequently changing and transforming their fashion styles to adapt to new trends, Malaysian retailers like Padini, Seed, Voir and Romp have developed concept stores to compete with foreign popular brands. Fashion markets constantly have to deal with rapid changes which may become the cause of business failure and success alongside the intense global competition.

As more Malaysian households move into upper middle class and high income brackets, consumer complexity and commonalities in global preferences are expected to increase and fashion forms a sizeable part of the identity of an increasingly sophisticated multi-ethnic consumer base. Changing demographics and psychographics drive the fast changing fashion scene. The focus is on Gen Y consumers who appear to have an insatiable appetite for the quick and trendy brands that are proliferating. With incomes and fashion aspirations rising, young affordable brands have rushed in to plug a gap for Gen Y consumers who want to stay chic but yet cannot totally afford luxury items.

The rising incomes of the Malaysian middle class have led to greater discretionary spending on lifestyle products such as fashion clothing and accessories. The increasing number of the online retailing in fashion clothing, both at home and abroad, have posed threats for many local brick and mortar fashion storefronts since more and more young consumers choose to buy online rather than visit stores. Players in this industry constantly find themselves having to aggressively compete to provide the best and latest fashion apparel in order to fulfil the consumer demand especially Gen Y consumers who have high taste and interest towards fashion. Gen Y live their lives online and prescribed to fashion blogging community as a platform to share their ideas and self-expression and relatable style icon. If the local offline fashion retail storefronts are to stay competitive, they need to understand fashion and style philosophies of this young and unique group of consumers. The competition in the fashion clothing market is made more intense with the short product life cycle of fashion clothing and the speed of turnaround on fast fashion collections. As clothing sales are anticipated to rise rapidly, driven by a growing young population and greater awareness of Western fashion more notably among Gen Y, there is a need to dwell deeper into understanding of their fashion knowledge, patronage behaviour and shopping style.

2. Problem statement

2.1 Fashion involvement

Fashion involvement is related to the behaviour of individuals regarding their fashion styles including, knowledge, awareness, interests and reaction in choosing their apparels (O'Cass, 2004, p. 24). Although this behaviour has been widely discussed in many consumer studies but it is still important to examine the interest and stimuli of Gen Y fashion involvement. Much have been said about their fashion sense but with mixed characteristics, there has been no clear distinctive fashion behaviour. Gen Y awareness of fashion extends far beyond their immediate surroundings. Therefore, this situation creates an interest in determining the factors that influence fashion involvement of Gen Y. Hence, the focus of this study is to examine fashion involvement of Gen Y, utilizing the fashion clothing involvement scale developed by O'Cass (2004).

2.2 Fashion knowledge

Fashion knowledge is defined as customer's knowledge regarding fashion apparel such as product attributes, product class and experience with fashion clothing (O'Cass, 2004, p. 26). Gen Y has been identified to have a high preference towards shopping and fashion clothing shopping is considered as top activity in their life (Martin and Turley, 2004). Studies have documented Gen Y consumers in their fashion purchase as quality conscious, brand conscious, novelty seeking and hedonistic, but it was revealed that they tended to be confused by over-choice and habitual shopper than the older generation (Mafini et al., 2014). Further examination into their fashion shopping typologies will assist marketers to understand and predict their fashion involvement and its drivers thereby facilitating the development and implementation of more effective marketing strategies for fashion houses.

2.3 Fashion store patronage

According to Wee and Chung (1997), fashion store patronage behaviour can be observed when consumer's desires and expectations are fulfilled based on shopping orientation and store attributes. Fashion shoppers notably females were found to respond to shopping mall environment and commit to mall patronage more notably among fashion leaders as they have a higher fashion knowledge and fashion sense (Michon et al., 1996, 2007). One’s fashion orientation and patronage is likely to drive fashion involvement.

2.4 Local brand confidence

Local brand confidence is defined as a consumer’s belief in his/her judgment or attribution of a local brand that is brand’s country of origin. The brand confidence concept evolves around the brand origin identification. It has been proven that brand confidence of a product, both local and non-local brands, influence consumer perception of brand value (Zhou et al., 2010). Herz and Diamantopoulos (2017) revealed that consumers are substantially influenced by a brand’s country of origin cue when assessing brands and would modify their brand assessments and purchase intentions when there is a country of origin cue change. Recent studies have identified brand as strengthening self-image and identity as an antecedent of Gen Y luxury fashion goods purchase (Soh et al., 2017; Thakur & Kaur, 2015). Hence, brand confidence as derived from brand origin could influence fashion involvement.

2.5 Fashion shopping style

Fashion lifestyle is a dimension of consumer segmentation in fashion market (Li et al., 2012) and is defined as consumer’s attitudes, interests and opinions in the purchase of fashion products (Ko et al., 2006). Gen Y live their lives online and prescribed to fashion blogging community as a platform for to share ideas and self-expression and relatable style icon. This study aims to determine the influence of fashion shopping style and fashion involvement of Gen Y. Gen Y consumers display various shopping styles of being brand conscious, novelty seeking, are recreational shoppers and brand loyal but they tended to be confused by over-choice and habitual shopper than the older generation (Mafini et al., 2014, Eastman et al., 2012). If the local offline fashion retail storefronts are to stay competitive, they need to understand fashion shopping style philosophies of this young and unique group of consumers.

3. Methodology

Methodology utilized quantitative method, aimed to obtain primary data from Gen Y consumers at two big shopping malls that offer a wide selection of foreign and local apparel brands. This is to increase representativeness of Gen Y samples who are frequent mall shoppers. Using survey method, 152 respondents were conveniently sampled and selected based on their age group, fashion appearance and availability at the fashion stores in two shopping malls. Self-administered survey questionnaires that tapped on their demographic and fashion profile, fashion sense and knowledge towards a pioneer local fashion brand and against another foreign brand were distributed to respondents via mall intercept method. The two fashion brands were mentioned in the survey instrument to aid respondents to recall their shopping experience, style and patronage behaviour. Both retail outlets are located in the two shopping malls and offer clothing lines targeting Gen Y. This helped to increase the accuracy of responses from the respondents during the survey based on the product and store visibility.

4. Findings and discussion

Demographic profile of Gen Y respondents surveyed found 59.2% female and 40.8% male. 70% were from Malay ethnicity group. 57.7% tapped were mainly in the age group between 21 to 27 years and 29.2% between 28 to 34 years old, and 13.1% from 14 to 20 years. Majority (62.3%) were single and had tertiary education (63.1%). In terms of job background, there was representation of respondents from the private sector (27%), government sector (28%), self-employed (17%) and students (28%). 57% of the respondents' income level were above the urban mean wage of RM2662 based on statistics from the Department of Statistics Malaysia, 2016.

Regression results in Table 1 show that in R^2, 33.4% of fashion involvement can be explained by fashion knowledge, local brand confidence, fashion patronage and fashion shopping style. However only fashion knowledge (β = .443, t = 4.716, p = .000) was the only significant predictor on fashion clothing involvement of Malaysian Gen Y consumers. It shows that the Malaysian Gen Y consumers are aware and know fashion clothing offered by both local and foreign fashion brand retailers. They stay updated about current fashion trends. The fashion knowledge can be gained from advertising exposure, interactions with sales people, peers, previous consumption and usage experiences held in memory. Gen Y consumers have been known to be fashion conscious, constantly doing online search information via their social media involvement and being fashion mavens have contributed to their fashion involvement outcomes. Findings were corroborated by previous studies on Gen Y consumers worldwide by O'Cass (2004); Hourigan and Bougoure (2012); Mafini et al., (2014). Findings support the view that fashion retailers must continuously introduce, inform, update and remind their customers about their new fashion lines through advertisement and promotion more notably via social media to cater to this Gen Y group of fashion blogging community.

Table 1. Regression results

	Standardized Coefficients Beta (β)	**t**	**F**	**p-value**
Fashion Knowledge	.443	4.716		.000
Brand Confidence	.172	1.466	15.67	.145
Fashion Patronage Behaviour	-.016	-.185		.653
Fashion Lifestyle	.073	.715		.476

R^2 = .334
Adjusted R^2 = .313
Significance level at $p \leq .05$
Dependent variable: Fashion Involvement

However, the other three variables namely consumer confidence towards local fashion brand (β = .172, t =1.466, p =.145); fashion patronage behaviour (β = - .185, t = - .016, p =.653) and fashion lifestyle (β=.073, t=.715, p=.476) were not significant predictors toward fashion involvement. Hence these factors had negligible influence on fashion clothing involvement among the Malaysian Gen Y group of consumers. Findings were unexpected and in contrast from similar past studies (O'Cass, 2004; Kinra, 2006) that showed consumers hold international fashion brands that project good brand image perceptions compared to local brand. This could be attributed to Gen Y fashion tastes. They could be skeptical towards local brand and prefer to choose from international brands because apparels from international brand are perceived to be of higher quality than the local brand, reinforcing the country of origin effect. Zhou et al., (2010) showed that confidence of brand origin was more profound in local brands than foreign brands. Findings were similar in another study on Malaysian young consumers which revealed that Malaysian Gen Y exhibited differences in fashion leadership, need for uniqueness, and seek attention to social comparison information (Tee et al., 2013).

Fashion store patronage behaviour among Malaysian Gen Y in their fashion purchase had no significant influence on fashion involvement whilst other studies on Australian Gen Y consumers showed otherwise (Hourigan, 2012; Aydin, 2016). Both studies cited recreational shopping behaviour in Gen Y influenced their fashion involvement. The reason for contrast results in this study could be explained that Malaysian fashion retailers have much offline store presence but do not or offer limited online sales for its collection, hence pre-empting the tech-savvy Gen Y consumers. Hence in this study, Gen Y desires and expectations on store attributes and shopping orientation did not match. Shoppers patronize fashion stores with a self-congruent personality positioning, they mind about where they shop. Retailers can benefit from creating a particular store personality such as external cues of store patronage as a unique selling proposition (Willems et al., 2012). The right store layout and merchandise have great influence on choice of local brand apparel against foreign brands. This may have affected Gen Y consumers' loyalty towards the local brand.

Fashion lifestyle in this study did not explain fashion involvement of Malaysian Gen Y. Past study found shopping lifestyle of fashion apparels among Western shoppers were quite different from Asian consumers due to differing fashion sense. Western consumers are obsessed to try the unique and new fashion design in order to impress others while Asians are more likely to follow a celebrity's fashion trends (Simmers et al., 2014). Hence this supports the view that fashion lifestyle and perceived brand image matters for young Malaysian consumers could differ. Similar behaviours were observed among Malaysians in their purchase of international fashion brands unlike local brands (Tee et al., 2013). There is clear indication that local brand retailers may have limited understanding on desires of Gen Y consumers in fashion apparels that suit their lifestyles. Popular celebrity endorsement is lacking in local retailers to stimulate the interest of Gen Y consumers towards their brand. Studies have supported the view that celebrities have great source of credibility and fashion influence to create attention and desire towards the receivers to follow the celebrities they admire (O'Guinn et al., 2006). Similarly, studies showed that for marketing communications activity evident in relation to aspects of fast fashion should be capitalised, for example through the use of "hero pieces" as identified in research by Barnes and Lea-Greenwood (2010). More crucial is the availability and retail presence must support the fast fashion proposition.

5. Implication of the Study

Findings in this study on Gen Y fashion sense have significance for marketing implications notably for retail strategies of fast fashion retailers that cater to this group of unique consumers. Understanding this peculiar group of Gen Y fashionistas, who have been found to be overdressed but with unique fashion sense that even do not follow mainstream fashion trends. As they exhibit individualistic signature fashion sense, it makes it clear there is a need for customised set of retail strategies when targeting this group labelled as fashion transformers. Williams and Page (2012) highly recommend multi-generational marketing to appeal to the unique needs and behaviours of Gen Y.

Due to strong fashion knowledge, capitalizing on the increasing use of omnichannel retailing in fashion adds value to the omniscient experience as Gen Y consumers are all-knowing. The Internet is key element to retailing especially for the Millennials. For local fashion retailers, strategy is to add online outlets to complement its offline retail format to cater to this group of fashion bloggers. This could mean collaborating with other online shops such as Zalora, 11^{th} Street, Lazada and other local online fashion shops such as Fashion Valet to garner a wider market share and to compete with foreign brand retailers and emerging independent fashion blogs.

Retailers have to embrace mobile technology strategies by incorporating e-tailing and mobile marketing into other parts of the customer journey, including order fulfilment, payments, and loyalty. As Gen Y have a major buying influence in retail, merchants who want to reach them will need to invest in mobile marketing as they are also the largest group of smartphone owners and use social media as shopping platforms. More updated and upscale innovative strategies that capitalize on using shopping functionalities for example Facebook's and Twitter's 'buy' buttons and 'like2buy' platform for Instagram are instantaneous that fit the lifestyle of the Millennials. Recent digital marketing includes the use of micro influencers in fashion marketing. However, it has been found that for hybrid retailers, in their omnichannel strategy that drives customers to online shopping, they should also coax online shoppers or incentivize them for example using omnichannel couponing to come into retail stores, where the shopping environment can induce them to spend more and entice willingness to "experiential" goods such as apparels (Zeng et al., 2016).

Results in this study were unique in the sense that fashion involvement among Malaysian Gen Y was not influenced by fashion lifestyle, fashion patronage and local brand confidence. The main explanation for this behaviour is that fashion involvement is much culture –centric and in recent fashion scene, it has become ethnic-bound. The fashion market in Malaysia has recently witness a shift in fashion trend towards modest clothing or Islamic fashion due the large Muslim consumer base. It has become evidently clear that modest fashion has emerged in Malaysia. International stores like Mango and Uniqlo in Malaysia have embarked on adaptation strategy to offer fashion ranges aimed at Muslim women. Others like Nike's Pro Hijab range is catering to modest sportswear for Muslim women. Hence this is likely to affect outcomes in this study as respondents were mainly Muslim Gen Y and could have exhibited different behaviour when shopping for modest clothing. This is one of the limitations of the study, however Muslim population is the major group in Malaysia. Thus, the factors influencing fashion involvement of modest clothing may vary from the variables selected in this study.

In the light of the contrast in findings in this study, that traditional mass marketing approaches do not work well with the Gen Y as the younger market segment as iterated by Williams and Page (2012). Gen Y react strongly to real life examples, they favour the truth and what is real. In essence, they care all about the experience bending on the emotional attachment. Fashion retailers have to make the shopping experience unique and memorable by delivering more imaginative ways to reward and incentivize shoppers.

6. Limitation and Future Research

There are limitations of this study that should be noted as well as specific directions for future research. Future research is necessary to confirm the findings contained in this paper as well as to clarify and provide a deeper understanding of Gen Y fashion involvement and its predictors. In terms of limitations, the use of a non-random, convenient sample must be considered. While the respondents in this study are part of Gen Y, they are shoppers and represent a subset of the general population, hence it would be useful to replicate further studies to include a larger and random sample. As findings were mixed and in contrast to previous studies on Western Gen Y groups, Malaysian Gen Y consumers differ much in fashion brand confidence, patronage and shopping style. Hence, additional research should explore and adapt new contemporary behavioral determinants on fashion involvement in an Asian perspective as well as in a fast changing fashion retail environment experienced by Gen Y as well as the Gen Z and Alpha generation segment as the newest generations. Vieira (2009) proposed and highlighted the need to test an extended theoretical model of fashion involvement with time, commitment as well as its mediator role. Future studies could also explore into behaviours of modest clothing and identify new determinnants to add and extend the fashion involvement framework.

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