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Determining female consumer's insight into products and shopping

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Abstract

This research explores consumer's insight into the female sportswear segment for the purpose of improving product development in the clothing industry in South-East Asia, a consumer base consisting of 500 million people. The research aims to clarify the important parameters on which buying decisions are made. The parameters are based on price, function, fit, brand, and design. The methodology used in this research is qualitative and quantitative consisting of participative observations, in-depth interviews, and survey. Results shows a wide range of shopping approaches utilized by consumers. Shopping behaviour can be seen depending on products and location. Essential parameters for an exercising garment are fit and design. abundance of available options in the market can cause confusion amongst consumers. The over-availability of products contributed to the creation of such confusion or even fussiness amongst consumers. This is to suggest that the more alternatives available to consumers, the more difficult it will be to find "the right" product. Findings also suggests that consumer's input and opinion is vital to product development and significantly contributes to product design and enhancement.

Keywords: Female consumers, Shopping, insight, culture, South-East Asia

1. Introduction

When searching, investigating, or buying product or a service, consumer is affected by a combination of different elements. Perhaps related to these items of the product itself or characteristics of the inundated. Attempting to understand how these properties are evaluated, is a function of the of the product or service viewed through consumer's perception (Kim et. Al 2008). As such, the trends for exercising garments can be described as growing and highly competitive as a niche. On one hand the exercising garments are highly influenced by street wear, leisure design and trendy. Therefore, sportswear is becoming more important for marketers across brands and retail segments (John, 2005).

On the other hand, the functionality aspects of the exercising are described to have a greater importance, for example, collaborations are made between sport brands and traditional fashion designers such as Stella McCartney for Adidas, Alexander McQueen for Puma, Emporio Armani for Reebok and so on (Suomi & Collier, 2003). Other brands however, historically, keep a lower importance in terms of trends and instead highlight an optimal exercising garment (Higgins, 1997). The marketing effort then is based on best possible functionality and optimal technology. This shows that there is a broad variety of styles offered for exercising garments and the trends from the typical fashion garments influence sportswear at the same time as the sport segment influence the fashion trends. As such, trends in sportswear therefore becomes difficult to define, but subject to more in-depth research to determine consumers' perception, which is a powerful tool in design aid.

Recent research on consumer behaviour emphasises the importance of consideration of all elements that indicates, shapes and the influences consumers' behaviour. Purchasing intention normally considers factors such as; need recognition, search and information gathering, evaluation of alternatives, reaching purchase intention, actual purchasing, and finally consumption (Bray, 2008). Although Zinkhan's (1992) research provides an understanding of the classification of the individual consumer as 'rational economic man'. However, a more comprehensive approach to consumers' behaviour have evolved through linear process of data gathering through "big data" marketing experience of vendors and sales analyses. This is in contrast to the slow evolutionary process in modern marketing, dated to post-World War II and the rise of consumption era, which is characterised by a series of marketing activities that shapes consumer's decision making (Blackwell, Miniard *et al*. 2001) through variety of marketing and sales oriented actions and exposures.

1.1 Research objectives

The purpose of this research is to get better understanding of how and why women purchase sportswear in Southeast Asia, namely Indonesia and Malaysia as a representative samples. The research aims to clarify important parameters, on which buying decisions are made in this significant market. The result is expected to generate information in product development as well as in marketing activities of benefit to both brand designers and retailors alike.

1.2 Research significance

The anticipated significance of generated results result, is to establish priorities, and provide better understanding of the relationship between varying standards and practices in the buying process in this particular segment of the Southeast Asian market. The significance of the SEA market is that it is one of the fastest growing regions in the world, with 500 million consumers, which including Indonesia, is experiencing the largest growing middle class. Therefore, marketers of high-end brands and retailors alike, are in constant quest of better understanding of the shifting trends in this important region (Firend, 2016). Better understanding of the consumer in Southeast Asia provides numerous opportunities for better target marketing, branding, and sales.

1.3 Research problem

In the ever growing quest of marketers to constantly determine and redefine essential industry parameters such as; brand characteristics, brand loyalty issues, and market characteristics such as function, price, fit, and make and design. The problem lies in the changing consumer preferences, and what is perceived to be trendy. This is especially true in the face of increasing online purchases on platforms such as Amazon (which constituted 50% of all online sales in the USA in 2017), Walmart, google and others. The shift in consumers' preference then becomes more rapid than ever before, and information on consumers' trends becomes concentrated in the hand of few big-data companies. Therefore, anticipating preferences regarding particular segment of the industry becomes an issue of individual afferent by vendors, based on internal sales data, traditional marketing efforts such as focus groups and marketing research and industry sales figures. However, determining consumers' references and taste still curried out in the traditional manner by engaging consumers in surveys and observation to forecast future trends and references. Therefore, the need to know a grown market in the size of Southeast Asia intermittently, is imperative to marketers East and West. Constant examination of varying market parameters pertaining the apparel retail industry, with growing demand for sportswear, provides an insight into one of the world largest growing markets.

1.4 Theoretical framework

There are varying approaches to the analysis of consumer behaviour that influences a given study. Depending on the variables under examination, Foxall (1990) suggested the following approaches to examining the psychology of consumer decision making; economic man, psychodynamic approach, behaviourist approach, cognitive approach, and humanistic approach. Bray (2008) argues that the theory of buyer behaviour provides adequate framework for the parameters under investigation in the study. The model below (Figure 1) incorporates numerous learning constructs suggested by Loudon ANDDella Bitta (1993) which includes elements such as; Motive, evoked set, decision mediators, predispositions, inhibitors, and satisfaction. Such model provides the foundation for subsequent models, all in which are effective in the examination process of various decision making processes, that constitutes consumer's behaviour. Hence, the model of Loudon ANDDella Bitta (1993) has shaped the investigative methodological effort set for this study.
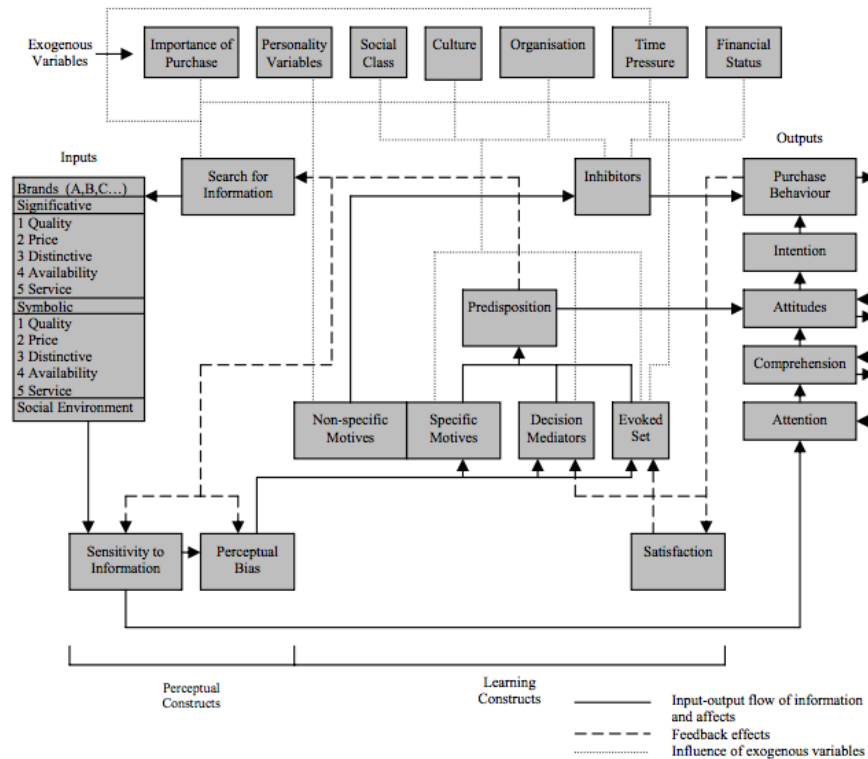
Exogenous Variables

| Importance of Purchase | Personality Variables | Social Class | Culture | Organisation | Time Pressure | Financial Status |

Inputs

Outputs

Brands (A,B,C...)
Significative
1 Quality
2 Price
3 Distinctive
4 Availability
5 Service
Symbolic
1 Quality
2 Price
3 Distinctive
4 Availability
5 Service
Social Environment

Search for Information

Inhibitors

Purchase Behaviour

Intention

Predisposition

Attitudes

Comprehension

Non-specific Motives

Specific Motives

Decision Mediators

Evoked Set

Attention

Sensitivity to Information

Perceptual Bias

Satisfaction

Perceptual Constructs

Learning Constructs

———— Input-output flow of information and affects
– – – – Feedback effects
·············· Influence of exogenous variables

Figure 1. The Theory of Buyer Behaviour

Source: (Howard ANDSheth 1969, Loudon ANDDella Bitta 1993)

2. Methodology

Both qualitative and quantitative methods were applied in this research. Observations and interviews were performed to provide further insight into consumer's perceived preferences and to support the qualitative and quantitative efforts. All research was conducted in Malaysia and Indonesia equally. Participants from three cities in Malaysia were engaged in data collection, these are; Kuala Lumpur, Penang, and Johor. While participants from only the city of Jakarta, which is Indonesia's largest and most cosmopolitan city. Jakarta because of its diverse and high population, is considered to be a representative for the entire nation of Indonesia.

2.1 Qualitative methods

The observation aspect of the research included conversations with shoppers, which was at random in over six shopping centres in Jakarta, and included 13 retailors and brands to explore people's perceptions. The result is logged, classified and analysed using open-coding system to classify opinions (perceptions and interpretations). Equally, 4 shopping centres in Kuala Lumpur, Malaysia with 9 retailors and brands participated in the study, 2 shopping centres in Penang with 2 retailor and 2 shopping centres in the city of Johor with 1 main retailor and 1 branding shopping centre was used to collect data.

In-depth interviews for the implementation of open-ended questions designed to be a normal conversation or discussion rather than the traditional formal questioning. Minimization of the influence that the researcher has over the people that are being studied was taken into consideration, although this is difficult to avoid and has to be taken into account when data is analyzed. (Bogdan, 1984). Additional component of this research consisted of observations that have carried out with participants in gyms (1 in Kuala Lumpur and 2 in Jakarta, where people were interviewed regarding their preference of brand loyalty, and material selection.

2.2 Quantitative methods

Qualitative methods are combined with the quantitative approach to support research. In quantitative methods also included social media platforms such as: Facebook, and Instagram to collect the data. Both social media

platforms provided effective tools for quantitative data collection, which was beneficial to gauge participants responses in terms of numbers and anonymity. This is reflected in the statistics and graphs.

2.3 Participative Observations

Observations were done on women who visited retail stores, shopping for new exercising garments. All participants are women between the age 20-40, exercising in average, one to several times in the span of one week. The observations have been applied with a participative approach, which means that the shopper is aware of the observation and interaction takes place during the shopping activity. By doing this it is expected to gain more information and spontaneous opinions from the customer at the actual moment instead of discussing it afterwards, because afterwards the customer might not remember why or how they acted and reflected.

2.4 Interviews

In total 10 number of interviews has been held and have been performed immediately after the observation in each Malaysia and Indonesia. The primarily purpose of the interviews was to discuss sportswear purchases in general, however some additional discussions have been held concerning the observation. The interview design consisted of prepared open-ended questions, where alternatives or examples have been avoided with the purpose to not influence the consumer. However, some alternatives and examples were used, when the respondent does not understand the question. The time planned for one interview was set to 60 minutes but ran between 20 to 40 minutes. The pre-planned questions were divided into four categories; planning, in store, brand loyalty and the use of the garment. This structure made it easy to follow and organize the collection of the data to be analysed. It was expected to easily put the participant into different situations and enhance the identification of a situation.

2.5 Questionnaire

A questionnaire consisting of nine short questions were disposed with the result of 50 respondents in both countries, 25 each. The survey was used as a quantitative research tool to collect data. The questionnaire was based on the results obtained from the in-depth interviews.

2.6 Limitations

The methods were limited to the point of sale of sportswear. A limitation was also done in the choice of participants according to number, age, gender and exercising experience. The parameters were chosen to optimize the time and the relevance for the research.

3. Literature Review

VOC (voice of the consumer) cannot be a consumer-oriented society, and can be described as a new phenomenon, rather than methods and approaches and to understand its importance can be described as taking a new turn. QFD (Quality Function Deployment) according to Akao (2004) is a quality system with the purpose of "translating consumer requirements into appropriate company requirements at each stage from research and product development to engineering and marketing" (Tversky & Simonson, 1993). The system was developed in the 60`s by Shigeru Miznno and Yoji Akao (1978) and originally focused on the manufacturing industry. In the QFD system there is a recognized concept called *genba* or *gemba*, in Japanese it means *the actual place* or *the real place* and relates to customers' place of business. By using this concept, customer's genba is visited to understand his or her problems. In quality management for example, the genba is the manufacturing floor (thequalityportal.com). The consumer may have more influence today than ever before on marketing strategies and their voices and wishes are of great importance. Listening to consumers and to the idea of their views is part of being close to them. The consumer has become the responsibility of the buyer in an active role in the past three decades (Prahalad and Ramaswamy, 2000).

Fashion Industry

According to Jacobs (2006) the fashion industry lacks the application of demand chain management strategy, and market derived information, which is still handled largely in a mechanistic way. The author suggests that demand chain management is crucial, particularly for the fashion industry because of one of the main challenges in this sector is expected errors in manufacturing clothing. Even if the industry has established in terms of example technology (such as RFID) there are still too many customers that end up frustrated and do not find what they are look for (Jacobs, 2006). One reason for this, is that the fashion industry does not address the attention of consumers in an effective manner. The relationship between the consumer and the designer and also got a loss because of the fashion stores and is usually managed by chains instead of the owners of these days (Jacobs, Van Tonder, 2003). To manage the loss of an important relationship, companies have begun to identify

"consumer target", when more of the investigation, it became clear that the signs are no longer exactly the same description of the target consumers, is described as a single woman professional, independent, and that means that the one to be satisfied is the individual consumer, not the artificial profile.

Difficulties faced by the fashion industry in the supply chain because of the rapid changes in consumer trends. The methods that are used by fashion companies today to create a supply chain efficiently report is the information technology. All this is subject to fundamental changes in the face of the fourth industrial revolution of digital manufacturing. Consumers today demand customized products delivered in a short time and at an affordable price. Postponement has been applied to some companies to customize the allocation of products, but at the same time maintaining a short and profitable production. In a postponement method, the process is performed to finalize a product or discrimination on the final point of the supply chain as possible. Postponement method can increase the time to provide an opportunity to respond to rapid changes in market developments and respond to customer requests efficiently and can be maintained low inventories (Ghiassi & Spera, 2003).

What consumers want?

It is not unfair to question how well the consumers know their own desires, wants and what is the influencing factor in situations where choices are to be made. By analysing and investigating the influences on consumers purchase decisions, more effective marketing strategies can be developed (Kotler & Armstrong, 2010). Examples of the influencing factors in a purchase situation are the available alternatives, the timing and the quantity of purchase. understanding how availability of products affects consumer's choices mean that one cannot assume that the customer has well-defined preferences which in turn guide their purchase decisions (Kotler & Gertner, 2002). Instead consumers construct their preferences in the point of sale for a specific purchase situation. For example, it has been found that the addition of a less attractive product can increase the interest of a second product, or the addition of a very expensive alternative can increase the choice of a middle expensive product, which has before the addition, been seen as a too expensive alternative (Dodds 1991; Katila & Ahuja 2000; Von Hippel 2005; Underhill 2011).

Female shopping behaviour

Females more than males of the buyers as it was before. Women have more money to spend, but less of patience and time for the place. Shopping can be a social activity where women go into the shops with friends just for mixing. When you buy, along with a friend, women tend to buy more and stay longer in the store. Buy to reinvent itself to become a better version, more beautiful, happier and better self, is a transformational experience. This also means that women require a lot from the shopping environment (Lee Taylor & Cosenza 2002; Underhill 2011).

As such, research parameters will be based on variables such as; function, price, fit, and make and design. It aims to discover the hidden needs of the consumer to understand how they think unconsciously, feel and act during buying activities. And knowledge should be obtained by comparing the verbal ideas to the consumer and the actual performance of the discussions and analysis of the responses. It is also expected to know the importance of brand and brand loyalty, and why and to what extent consumers are brand loyal.

4. Analysis and Findings

Analysis of collective data shows the following; Feelings and emotions related with the purchase of sportswear is explained as positive by the participants. They say they "love shopping", but it is unclear whether they distinct shopping experience with the normal daily purchases of goods, since they tend to explain that "buying is fun" and "I could buy unlimited amount of stuff…" It was also found that most of participants go to sports retailers because of particular requirement for something they need, this was further verified by quantitative data findings. Non of the participants made the process of buying a spontaneous; they went through the other products then the ones they intend to buy. The buying requirement is caused because of the lack of garments in terms of attributes of clothing worn out or functional attribute for the activity of specific.

There is diversity in the definition and aspiration in the comfort of aesthetics. They can give a detailed description of the structure they seek and find what qualities they need. Some of the participants are not personally involved in the selection of clothing, rather than describing purchases if necessary. Dissatisfaction in stores and in a purchase situation is usually connected to colours or fit and a "good" fit usually described as lose and fluffy rather than tight. Short tops are considered as undesired but too long tops are discarded, as well, before testing.

Participants in this study cannot be described as price sensitive. It was found that the price is not the most critical if they find something that attracts them. However, participants tend to check the price early in this process. For example, one of the participants who have been described as not being price sensitive explained that she bought two tank tops because they were cheap.

The brand knowledge can be described as high among the participants. In more detail, they have knowledge about brands and they can easily mention brands that they like. A positive explanation of a brand is usually based on quality and style. But participants explained that they are not brand conscious. It means they do not go to the store and buy a brand only for the sake of it. Although they have enough knowledge about the brands, their purchase is often influenced by other factors like fit, style and colour. The common element in five out of ten purchasing observation was design.

The priority of the participants based on the interviews is presented in a table below.

Parameters	1	2	3	4	5	6
Material	0	2	3	1	3	1
Fit	2	4	3	1	0	0
Price	3	1	2	0	1	3
Brand	0	2	0	2	2	4
Design	5	0	1	2	2	0
Function	0	1	1	4	2	2

Table 1. Priority List

The priority list from each participant summarized in the table has been transformed into the graph below.
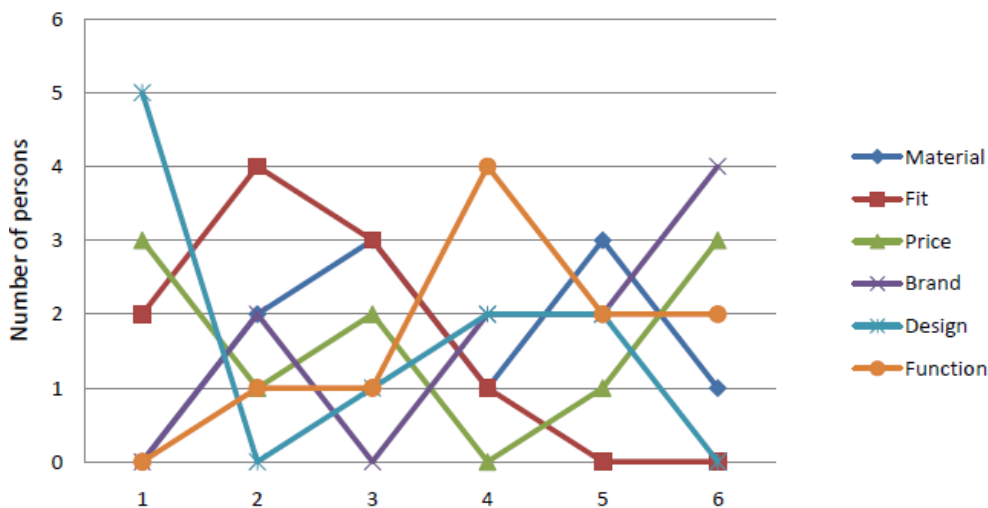

Chart 1. Priority List

In addition to observations and interviews, survey has also been done to evaluate how women perceive the process of their shopping. Questions have been composed to fit the question formulation of both the observation and interview. Issues about how people shop and why has been put together to receive the information needed. 110 respondents have taken part in the online survey sent through Facebook in both countries 40 from Malaysia, and 70 from Indonesia. The result of the survey shows in in tables and charts (See Appendix).

Choice of Material

A various knowledge and perception of material choices resides with the participants and the respondents.

of synthetic materials as being recommended for exercising. The most common reason for rejection is to look at the presence of synthetic materials unpleasant sensation in contact with the skin. The choice of material can however be prioritized lower to clear the way for aesthetical aspects, such as design and fit, a result from the observations (Table 5; Chart 5).

In the interviews the materials are mostly described according to how they look and feel, for example sleekly, crispy, shiny and soft, but this does not tell whether the material is in cotton or synthetic. Just because the participants believe it is a certain fabric does not mean that they are correct. To what extent do they actually know which fabric they have bought? Most of the participants do not check the washing instructions to gain information about material content.

According to the observations the most commonly used material in exercising is cotton or cotton blend. In the questionnaire the majority of the respondents answered that their exercising apparel is made out of synthetic material but people tend to know relatively well what the "ultimate" or recommended material for exercising is, and a possibility is that they want to give the right answer instead of answering with real facts in the questionnaire (Table 6).

Shopping with or without company

Sportswear shopping is performed in a singular manner. The result can be drawn from both studies (Chart 6).

Prioritizing

According to interviews and the questionnaire it is derived that the prioritizing parameters has an overall similarity according to fit, price and brand. A substantial difference is the importance of design. The importance of the participants' interest for design and style, in the store, is evaluated higher than peoples own perception of their concern for this parameter.

Reason for refusing the purchase

It is derived from both methods that the declining a garment is a result of the wrong fit. The survey also shows the price sensitivity. One possible cause is that it is difficult for the participants to admit sensitivity to price during a face-to-face situation (Table 7).

Amount of garments

The trend found with both methods is that the garments are purchased in single form compared to many garments purchased at the same time on few occasion (Table 7).

Brands

In the analysis of the result the brand focus is described as relatively low and the brand does not seem to be of a great importance, this is concluded from the observation, the interviews and the questionnaire. Brands are not measured as the most important factor. It is observed within the participants that they are aware of the brands and explained what brands they like but it contradicts with their shopping behaviour as they seldom look for the specific brand during the shopping in the store, this is also confirmed in the observations. According to the questionnaire, the brand is also concluded as less important than fit, design and material.

Usage of garments

The result from the observation shows that most of the participants use their garments to all exercising activities. They do however a selection of their available garments when going to a specific activity but they further say that this is nothing they consider during a purchase. A related question was discussed during the interviews and also asked in the questionnaire concerning the use of exercising garments as leisure wear. The majority from both methods explain their items primary as exercising garments. Three of the participants say that they use these garments sometimes on their leisure time but it is not a determinant factor during purchase. Almost one-fourth of the respondents in the questionnaire say that it varies (Table 9).

Colours

The participants have a very positive attitude towards colours, but at the same time they fear too much colour. The usual approach is black bottom and more colourful tops. They want to be unique but do not want to stick out. They want the right expression and want to send the right signal in their exercising garments. Many of the participants do not want to match their top and bottom too much. They want to give the impression of not being

comfortable style and a totally wrong expression is subtle. Even if the style and the design are important it is also important what not to wear.

Finally, the literature review section of this study, the concern raised by the fashion industry was that there are many consumers, having a clear objective for their shopping and ready to spend money, walking out of the store empty handed. One can ask if this is because to the lack of knowledge about consumer from the design aspect, or whether the consumer lacked knowledge of what she wants because of the abundance of available options in the market, which may cause confusion. The over-availability of products contributed to the creation of fussiness of consumers. This is to suggest that the more alternatives available to consumers, the more difficult it will be to find "the right" product. As such, this research suggest that the answer is not flooding the marketplace with more products, rather, better products with designs. This in turn, ties to the issues of influence, stimuli, and consumer involvement in the design through feed forward mechanism, to ensure the availability of products relevant to the consumer in Southeast Asia. This is particularly true when most brands tend to target Western consumers in their design and marketing effort. Results further shows a variation in shopping behaviour, which may be attributed as depending on products and location. Essential parameters for an exercising garment are fit and design. Findings also suggests that consumer's input and opinion is vital to product development and significantly contributes to product design and enhancement.

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APPENDIX

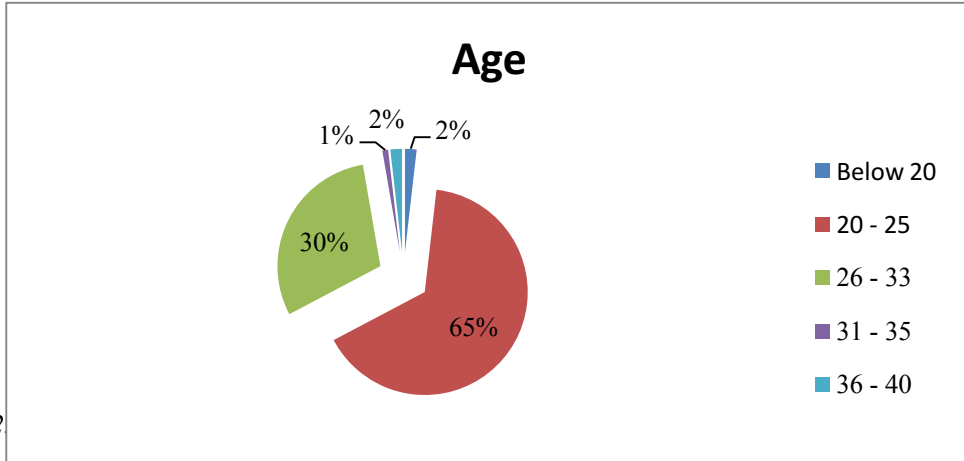**Age of participants**

The age of the participants is mentioned below;

Table 2.

Age	
Below 20	2
21 – 25	72
26 – 30	33
31 – 35	1
36 – 40	2

Chart 2. Participants Age

Occupation of Participations

The breakdown of the participant's occupation is as follows:

Occupation	
Student	79
Employed	18
Student & Employed part time	11
Other	2

Table 3. Participants occupation

OCCUPATION

10% 2%
16%
72%

- Student
- Employeed
- Student & Employeed part time

Chart 3. Occu...

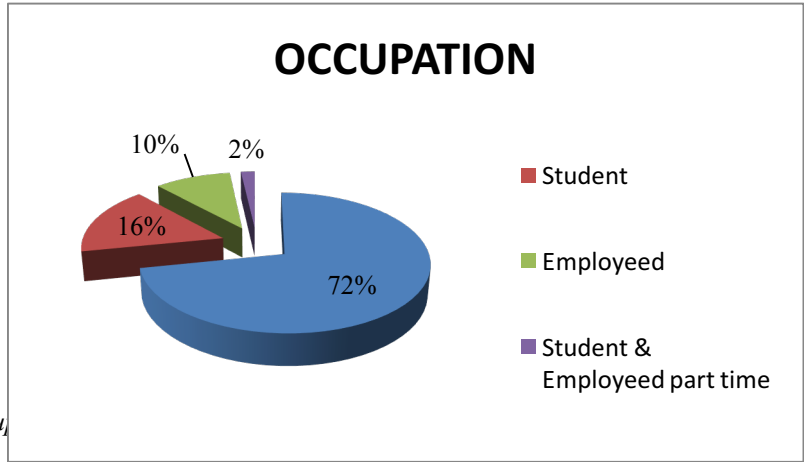**Factors for Purchasing**

Q-1) Which are the most important factors when you decide to purchase exercising clothes? Rank the parameters from 1 to 5, where 1=most important & 5=least important

Parameters	1	2	3	4	5
Material	19	31	26	26	7
Fit	46	27	7	14	18
Price	16	23	35	26	11
Brand	19	13	10	18	50
Design	11	31	38	21	10

Table 4. Factors for purchasing

Chart 4. Factors for purchasing

Factors for Purchasing

10% 17%
17%
14% 42%

- Material
- Fit
- Price
- Brand
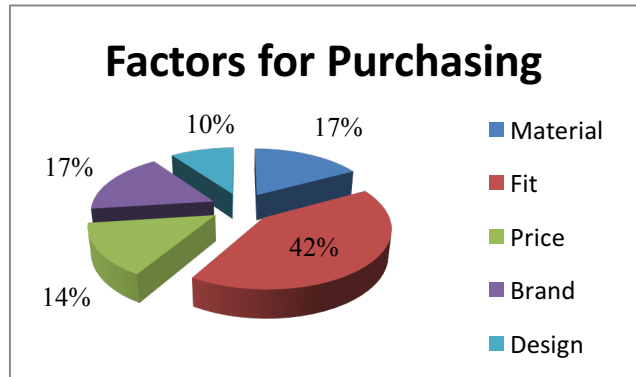- Design

Choice of Material

Q-2) What is most important when you evaluate and choose the material? Rank the parameters from 1 to 4, where 1=most important and 4=least important.

Parameters	1	2	3	4
Soft & Comfortable	42	41	14	18
Good for moist transportation	36	35	19	16
Thin & Light	16	24	32	18
Good stretching capabilities	14	32	35	24

Table 5. choice of material
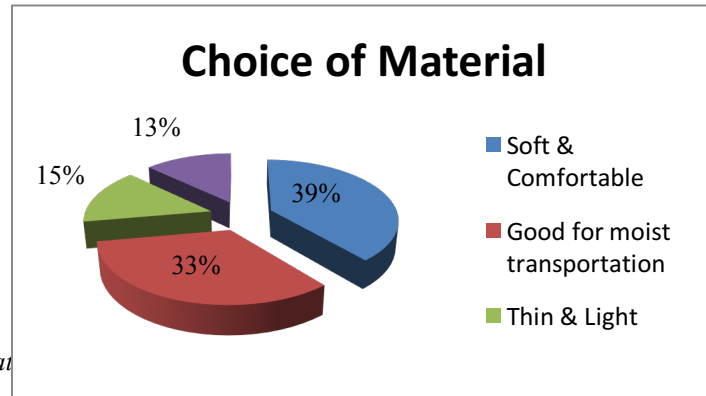
Chart 5. Choice of material

Priority list Material Properties	
1	Soft & Comfortable
2	Good for moist transportation
3	Good stretching capabilities
4	Thin & Light

Table 6. Priority list table

Shopping with or without Company

Q-3) Which option is most suited to how you shop?

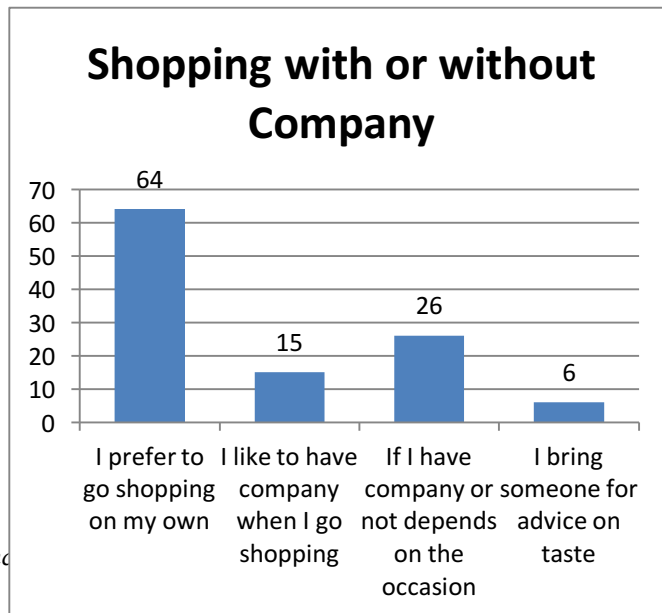|	
I prefer to go shopping on my own	64
I like to have company when I go shopping	15
If I have company or not depends on the occasion	26
I bring someone for advice on taste	6

Table 7. shopping preference

Chart 6. shopping preference

Reason for refusing a purchase

Q-4) What is the most probable cause to why you choose not to purchase an exercising garment?

Wrong fit	**74**
Wrong design	**21**
To expensive	**73**
Wrong material	**26**
Unknown brand	**3**

Table 8. reason for refusing

Reason for refusal

74 — Wrong fit
21 — Wrong design
73 — To expensive
26 — Wrong material
3 — Unknown brand
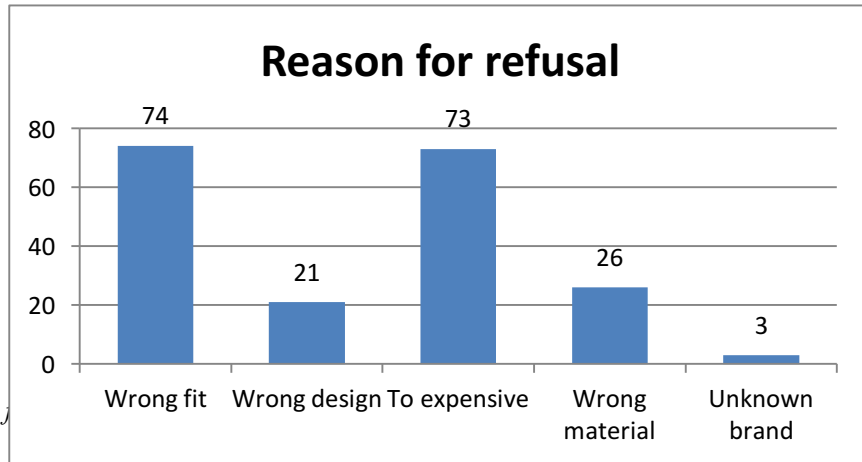
Chart 7. reason

Amount of Garments

Q-5) Which option is most suited to how you shop?

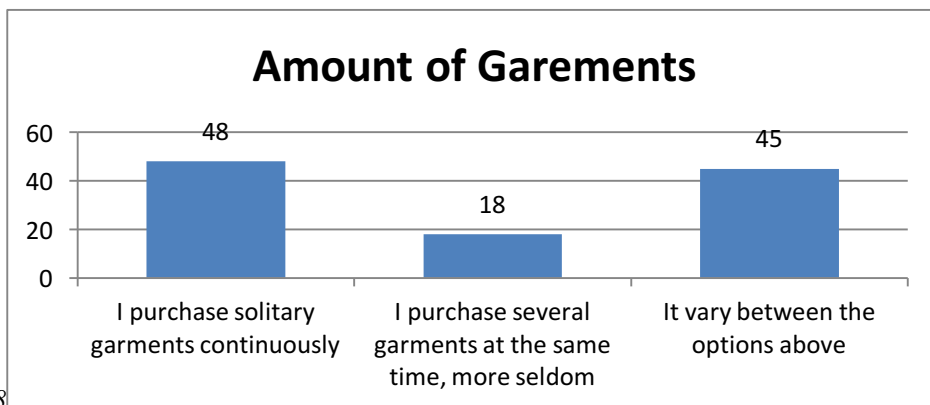|	
I purchase solitary garments continuously	48
I purchase several garments at the same time, more seldom	18
It vary between the options above	45

Table 9. amount of garments

Amount of Garements

48 — I purchase solitary garments continuously
18 — I purchase several garments at the same time, more seldom
45 — It vary between the options above

Chart 8

Usage of Garments

Q-6) Which option is most suited about your usage of garment?

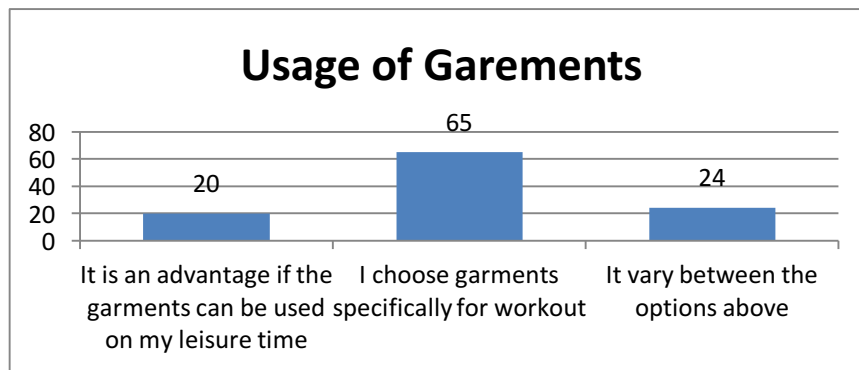|	
It is an advantage if the garments can be used on my leisure time	20
I choose garments specifically for workout	65
It vary between the options above	24

Table 10. usage of garments

Chart 9. usage of garments

Cotton Vs. Synthetics

Q-7) Which material is most of your exercising apparel made of?

Cotton	24
Synthetics	71
Cotton and Synthetics	10

Table 11. cotton vs. synthetics

Cotton Vs. Synthetics

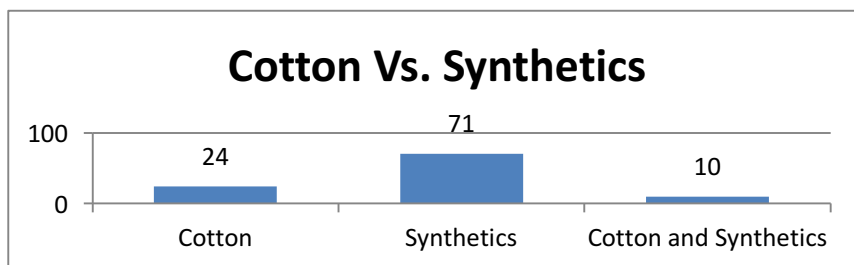|	Cotton	Synthetics	Cotton and Synthetics
100	24	71	10
0			

Chart 10. cotton vs. synthetics

Open ended question about material

Q-8) Why do you choose to exercise in cotton or synthetic?

|	
Reasons for exercising in synthetics according to better moist transportation	48
Other reasons for exercising in synthetics	23
Reasons for exercising in cotton according to the comfortable feeling in contact with the skin	19
Other reasons for exercising in cotton	10

Table 12. open ended question

Question about Material

10%
19%
23%
48%

■ Reasons for exercising in synthetics according to better moist transportation
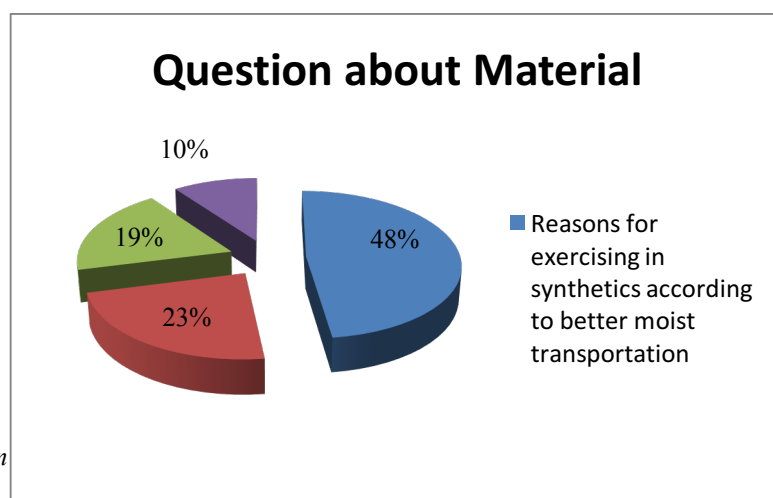
Chart 10. cotton

Brand Selection

Q-9) Brand selection?

The same brand at top and bottom	10

Different brands on top and bottom	51

Table 13. brand selection
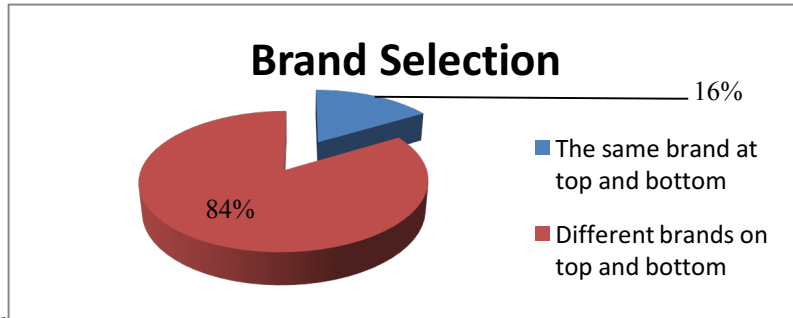

Brand Selection

16%

■ The same brand at top and bottom

84%

■ Different brands on top and bottom

Chart 12. brand selection