

Salability of Chinese apparel in Japanese department stores

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Abstract: To better understand the reasons for the salability of clothing now designed and sold in China and Japan, we asked Japanese experts to evaluate Chinese and Japanese brands of clothing currently for sale in the Japanese market. Ten items of Chinese brand clothing (two dresses, eight jackets) were purchased for evaluation from a department store in Beijing, and five Japanese brand jackets were purchased for evaluation from a department store in Tokyo. Seven Japanese apparel experts then evaluated all of the items; the experts were not informed of the clothing specifications. The items were evaluated on the basis of 1) material(s), 2) color(s), 3) silhouette, 4) design emphasis point(s), 5) designer ability, 6) pattern maker ability, and 7) sewing finish. Five of the Chinese clothing samples were judged as impossible to sell in Japanese department stores primarily because the sewing quality was incompatible with Japanese requirements, the designs were outdated, and the materials were of low quality. However, the other five Chinese clothing samples received high evaluations of salability in Japan on the basis of design and sewing quality. However, even for those samples evaluated as well designed, it was found that their salability in Japan could be improved through increased cooperation among designers, pattern makers, and production factories, and additionally, through improved sewing skills. The results of this study will help Chinese and Japanese apparel makers improve the salability of their clothing in both of those countries.

Keywords: Chinese Apparel, Japanese Apparel, Clothing Evaluation, Salability.

1. INTRODUCTION

While the Japanese apparel market remains relatively large scale, it has recently been experiencing saturation and reductions in size. Many global companies with products in both the low and high price ranges have been entering the Japanese market; according to 2010 statistics, the import penetration rate of clothing to Japan is 96%. Thus most clothing products in Japan are offshore productions. According to trade statistics, the value of imports of clothing and accessories in 2010 was 2,753 billion yen. Of these, imports from China comprised 76.4%, for a value of 2.1 trillion yen [Ministry of Economy, Trade and Industry of Japan, 2013]. It is assumed that most of the clothing products, imported from China and sold in Japan, are produced under the production control of Japanese companies. The quality of this clothing is sufficient to sell in Japan. China developed a strategy to enter such international markets in 2011 [Clothes Industry Network in China, 2013].

On the other hand, although Japanese fashion products are considered superior in the domestic market, few Japanese companies enter international markets, and thus the total international sales of such companies are considerably low. The situation is similar in the Chinese market. The Chinese apparel market, now worth more than 12 trillion yen, has become one of the more attractive world markets. European and American luxury and fashion brands have successfully entered the Chinese market. The success of Korean apparel in China is a remarkable example. It has become necessary for Japanese brands to enter the Chinese market to overcome Japan's current market saturation and reduction in size. For a Japanese brand to successfully enter the Chinese market, however, it is necessary to first understand the quality and design of the clothing that is currently being designed and sold in China.

The Chinese consumer behavior [O'Cass A. and Siahtiri V., 2013] and the marketing in China [Laforet S. and Chen J., 2012] were investigated to understand the Chinese apparel. The Chinese preferences of brands [Susan H.C. Tai, 2005] were also investigated. Zhang B. and Kim J. [2013] researched Chinese preferred body images. Mellor D. et al [2013] and Luo Y [2005] investigated the effects of consumers' appearance and body on their behavior for shopping. Even though those studies were researched on the Chinese customers and brands, the studies on the characteristic of clothing itself were less. Especially, the salability considered the clothing characteristic will be one important factor which may show the customers' preference. The preference is come up by Kansei. Clothing with high salability in China may not be sold well in another county or vice versa. It may be due to the different customers' Kansei depending on county.

The purpose of this study is to investigate the salability of Chinese apparel in Japanese department stores for Chinese and Japanese apparel makers. We asked Japanese apparel experts to evaluate the salability in the Japanese market of Chinese brand clothing currently being sold in China. By investigating the salability of clothing, we can understand the customers' preference. Furthermore, it helps designer and manufactures to make clothing which reflected the customers' Kansei.

2. EXPERIMENTAL

To gain knowledge about the quality and design of clothing now designed and sold in China, we asked Japanese experts to evaluate the salability of Chinese brand clothing in the Japanese market. We refer to Chinese brand clothing sold in China as Chinese apparel, and we refer to Japanese brand clothing sold in China as Japanese apparel. Ten items of Chinese clothing (two

Table 1: Sample specifications

| Sample name | Sample picture | Brand country | Retail price | Sample name | Sample picture | Brand country | Retail price |
|-------------|---|---------------|---------------------------|---|--|---------------|---------------------------|
| C1 |  | China | CNY850 (JPY 13,600) | J9 |  | Japan | (CNY 4,528) JPY 72,450 |
| C2 |  | China | CNY 795 (JPY 12,720) | C10 |  | China | CNY 3,128 (JPY 50,048) |
| J3 |  | Japan | (CNY 1,575) JPY 25,200 | C11 |  | China | CNY 1,149 (JPY 18,384) |
| C4 |  | China | CNY 589 (JPY 9,424) | C12 |  | China | CNY 799 (JPY 12,784) |
| C5 |  | China | CNY 1,068 (JPY 17,088) | C13 |  | China | CNY 2,598 (JPY 41,568) |
| J6 |  | Japan | (CNY 1,575) JPY 25,200 | C14 |  | China | CNY 2,897 (JPY 46,352) |
| J7 |  | Japan | (CNY 1,838) JPY 29,400 | J15 |  | Japan | (CNY 1,811) JPY 28,980 |
| C8 |  | China | CNY 2,592 (JPY 41,472) | <p>*Note: “J” refers to Japanese brand; “C” refers to Chinese brand. *Retail price was converted at a rate of 1 CNY = 16 JPY.</p> | | | |

Table 2: Apparel expert details

| Letter | Age | Gender | Occupation |
|--------|-----|--------|---------------------------------|
| A | 40s | female | university professor |
| B | 60s | male | designer / university professor |
| C | 50s | female | university professor |
| D | 50s | female | designer / university professor |
| E | 40s | female | pattern maker |
| F | 70s | female | merchandiser |
| G | 60s | male | merchandiser |

dresses and eight jackets) were purchased for evaluation from a department store in Beijing, and five Japanese jackets were purchased for evaluation from a department store in Tokyo. The specifications of these samples are shown in Table 1. Seven Japanese apparel experts (two university professors, two designers, a pattern maker, and two merchandisers) evaluated the samples. Additional details about the experts are shown in Table 2.

The experts were not informed of the clothing specifications, which included price, brand, materials, and country of manufacture. They examined the samples by observing them being worn, by putting them on a dummy, and by touching them.

First, the salability of the items in Japanese department stores was judged by the experts (possible or impossible). The experts were also instructed to make an estimate of the retail prices of the items. Then, the items were evaluated on the basis of their 1) materials, 2) colors, 3) silhouette (shape and outline), 4) design emphasis points, 5) designer ability, 6) pattern maker ability, and 7) sewing finish. Each category of evaluation was scored on a 0–2 or 0–3 point scale. Evaluators were required to provide the reason for each score they gave. Points were accumulated into a general score for each item. Finally, the reasons for each evaluation provided by the experts were summarized.

3. RESULTS AND DISCUSSION

3.1. Salability of Chinese apparel in Japanese department stores

The salability of the Chinese apparel items in the Japanese market was evaluated by the abovementioned Japanese experts (see Table 2). The experts' ratings of the salability of the Chinese apparel are shown in Table 3.

All of the Japanese apparel items were evaluated as having high salability. However, among the Chinese apparel items, only half of the samples (C1, C2, C5, C12, and C14) were evaluated as having high salability. The other samples (C4, C8, C10, C11, and C13) were judged as being impossible to sell in Japanese department stores.

The averaged general scores of the item evaluations are shown in Figure 1. The Japanese apparel item general scores were higher than those of the Chinese items for most evaluation categories except 'design emphasis points'; the scores for this category were similar for both the

Japanese and Chinese apparel items.

The main reasons given by the experts for the items being unsalable were that the required sewing quality was insufficient to meet Japanese requirements, the designs were outdated (even those samples currently being sold), and the materials were evaluated as being of low quality.

Table 3: Experts' evaluation scores regarding the salability of Chinese apparel (N=7)

| Sample number | C1 | C2 | J3 | C4 | C5 | J6 | J7 | C8 | J9 | C10 | C11 | C12 | C13 | C14 | J15 |
|----------------------------|----|----|----|----|----|----|----|----|----|-----|-----|-----|-----|-----|-----|
| Experts' scores: salable | 5 | 5 | 7 | 2 | 4 | 7 | 6 | 2 | 7 | 3 | 1 | 4 | 1 | 5 | 6 |
| Experts' scores: unsalable | 2 | 2 | 0 | 5 | 3 | 0 | 1 | 5 | 0 | 4 | 6 | 3 | 6 | 2 | 1 |

However, the Chinese clothing samples C1, C2, C5, C12, and C14, which received high evaluation scores of salability in Japan, were evaluated highly in the categories of design and sewing quality. Therefore, to obtain a generally higher evaluation, Chinese apparel needs to improve in the aspects of sewing finish, quality of materials, and design to be more salable in the Japanese apparel market.

The correlation coefficients between the experts' salable evaluations and the averages of the obtained general scores for the evaluation categories are shown in Figure 2. With the exception of 'design emphasis points', all of the categories showed high correlation coefficients. This low correlation coefficient value for the design emphasis points category indicates that design was emphasized in the Chinese apparel items. However, the entire evaluation was still low compared with the Japanese apparel, in particular with respect to the category of sewing finish.

To obtain a high correlation of regression equation than single correlation, a multiple regression analysis was performed assuming the experts' salable evaluations as a response variable and the evaluation items as explanatory variables. As a result, the adjusted multiple correlation coefficient was 0.72, which was lower than some single correlation coefficient. Thus, it was no effect to make a predictive equation using multiple regressions.

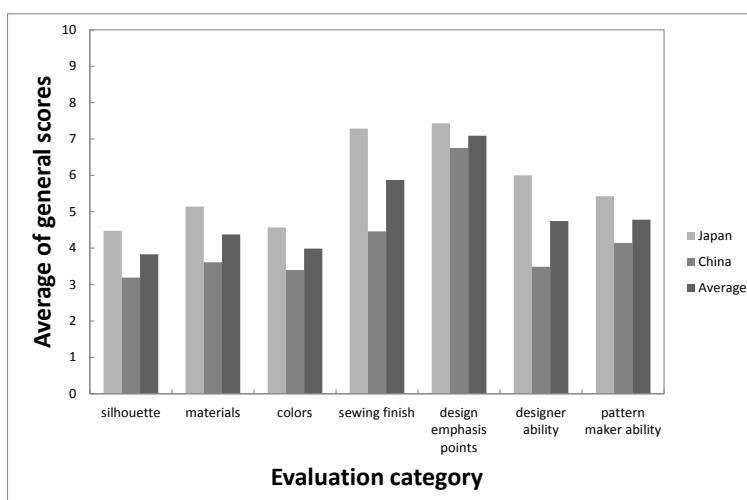


Figure 1: Averaged obtained general scores of the evaluation categories

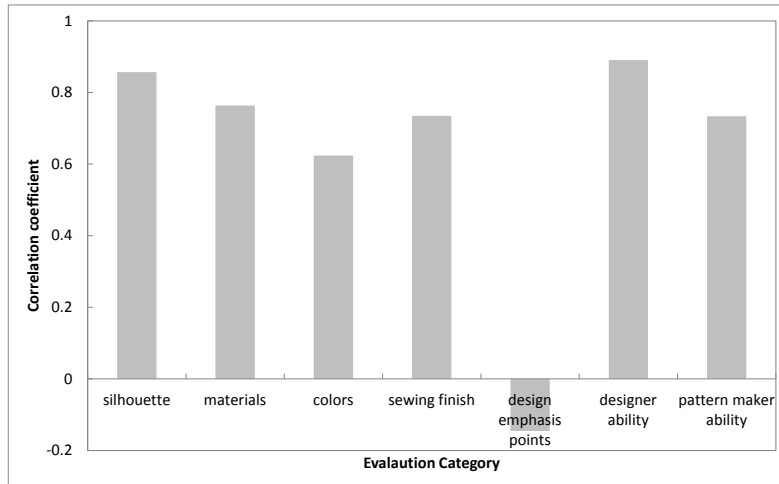


Figure 2: Correlation coefficients between experts' salability scores and the averages of the obtained general scores of the evaluation categories

The category scores for the samples with lower expert scores for salability in Japan are shown in Table 4. While those samples showed high scores in the 'design emphasis' category, the experts also commented that there are too many design elements in the items and also that the entire design was out of fashion. The samples that showed high evaluation scores are shown in Table 5. The characteristic of these samples included having a good silhouette, good materials, good colors, and/or good patterns. These samples also had good points of design emphasis and comparatively high sewing finish quality.

The results indicate that even for those samples evaluated as having design emphasis points, their salability in Japan could be improved through greater cooperation between designers, pattern makers, and sewing factories, and additionally, through improved sewing skills.

Table 4: Evaluation scores of samples with lower scores for salability in Japan (N=7)

| Sample number | Experts' salability score | silhouette | materials | colors | sewing finish | design emphasis points | designer ability | pattern maker ability |
|---------------|---------------------------|------------|-----------|--------|---------------|------------------------|------------------|-----------------------|
| C4 | 2.0 | 3.3 | 1.4 | 2.9 | 5.7 | 9.3 | 1.4 | 2.9 |
| C8 | 2.0 | 2.4 | 2.4 | 3.3 | 5.0 | 10.0 | 2.9 | 3.6 |
| C10 | 3.0 | 2.9 | 3.3 | 1.4 | 5.0 | 8.6 | 2.9 | 4.3 |
| C11 | 1.0 | 1.9 | 2.9 | 3.3 | 0.0 | 7.1 | 2.9 | 1.4 |
| C13 | 1.0 | 1.4 | 1.4 | 2.9 | 3.6 | 5.7 | 2.1 | 2.9 |

Table 5: Evaluation scores of samples with higher scores for salability in Japan (N=7)

| Sample number | Experts' salability score | silhouette | materials | colors | sewing finish | design emphasis points | designer ability | pattern maker ability |
|---------------|---------------------------|------------|-----------|--------|---------------|------------------------|------------------|-----------------------|
| C1 | 5.0 | 3.3 | 3.8 | 3.3 | 5.0 | 7.9 | 5.0 | 5.0 |
| C2 | 5.0 | 3.8 | 5.7 | 5.2 | 5.7 | 7.9 | 4.3 | 4.3 |
| C5 | 4.0 | 3.3 | 4.8 | 4.8 | 4.3 | 8.6 | 3.6 | 5.0 |
| C12 | 4.0 | 3.3 | 3.8 | 3.3 | 2.1 | 5.7 | 2.9 | 5.0 |
| C14 | 5.0 | 5.2 | 5.2 | 4.8 | 8.6 | 6.4 | 5.0 | 7.1 |

3.2. Evaluated prices

The retail prices and the experts' estimated prices of the samples are shown in Figure 3. The price of items judged as unsalable in Japanese department stores was set as zero JPY. With the exception of the scores of one expert (E1), no correlation was found between the actual purchase and the estimated prices. The estimated prices of the Japanese apparel samples were close to the actual purchase prices. As for the Chinese apparel samples, however, the prices of samples C8, C10, and C13 were estimated to be less than half of their actual purchase prices (sample C14 was the exception). Even the Chinese clothing samples with an actual retail price of over 40,000 JPY were not estimated by the experts to have such prices in Japan. These results therefore indicate that purchase prices may be decided more by the brand than the actual item characteristics.

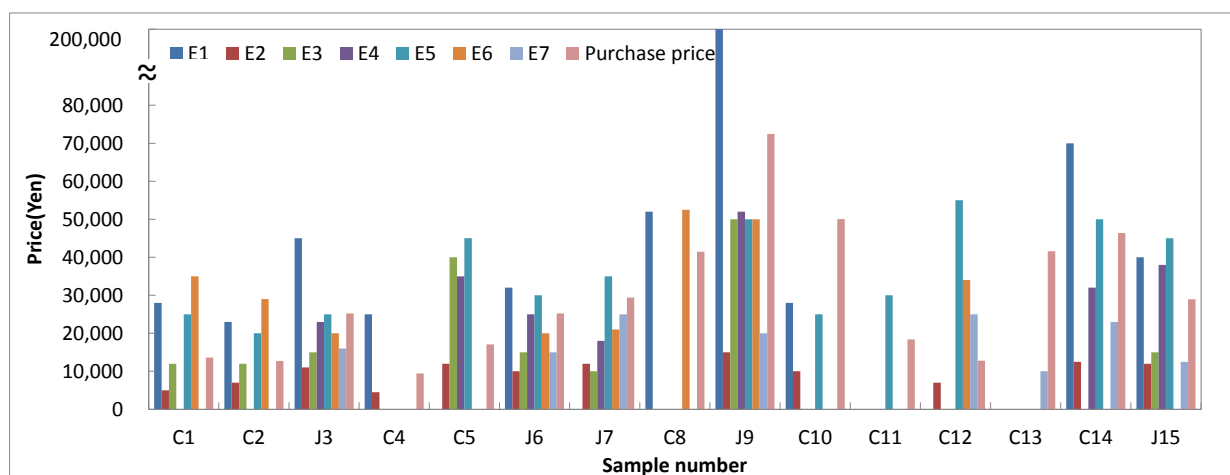


Figure 3: Estimated and actual retail purchase prices of samples

3.3. Evaluated points by comments

The Japanese experts had various career backgrounds, which likely had an influence on their evaluations. Nonetheless, some common points for consideration were identified from their comments regarding the evaluated items. Namely, they noted that to successfully sell clothing in Japanese department stores, apparel producers should focus on improving seam finishing, pressing marks, and other details such as buttons.

3.3.1. Design emphasis points and design balance

Samples with more than three design emphasis points were given low evaluations by the experts. Figure 4 shows those samples that were judged as having too many emphasis design points; C5 was evaluated as having design emphasis points on its pocket, belt, sleeve shirring, and front hem curve; C8 was also found to have design emphasis points on its tuck, patch pocket, and length difference between the front and back. In Japan, apparel with too many design emphasis points is less preferred.

Design balance was also considered to be an important evaluation point in this study. Samples of unbalanced design are shown in Figure 5; samples C4 and C10 were evaluated as having an entirely unbalanced design, while samples C11 and C13 were evaluated as having sleeve lengths that are too long for the average Japanese body shape.



(a) C5

(b) C8

Figure 4: Examples of excessive design emphasis points



(a) C4

(b) C10

(c) C11

(d) C13

Figure 5: Examples of unbalanced design

3.3.2. Seam finishing

Most of the experts looked for very high quality in the category of seam finishing. Figures 6 and 7 show examples of clothing with poor and good quality seam finishing, respectively. Interlock seam finishing was especially evaluated as being of poor quality, while piping seam finishing was considered to be high quality. However, the textile properties of each sample were also considered. Thus, even samples with piping seam finishing were evaluated poorly if they had thick textile properties, as shown in Figure 8.



(a) C2

(b) C4

(c) C10

Figure 6: Poor-quality examples of seam finishing



(a) J3

(b) J6

(c) C8

Figure 7: High-quality examples of seam finishing



Figure 8: Example of low-quality piping seam finishing (C13)

3.3.3. Pressing mark

The pressing mark of each sample was also examined. Most of the experts mentioned the pressing mark around the collar and lapel areas in their comments. Figure 9 shows some examples of the pressing marks of the samples.



(a) C5

(b) C10

(c) C12

Figure 9: Examples of pressing marks

3.3.4. Button

Buttons were another category of quality evaluated by the experts. Figure 10 shows examples that were judged as easy to unbutton. This evaluation was also related to the type of seam finish. The material of the buttons was also evaluated from the aspect of poor or high quality (see Figure 11).

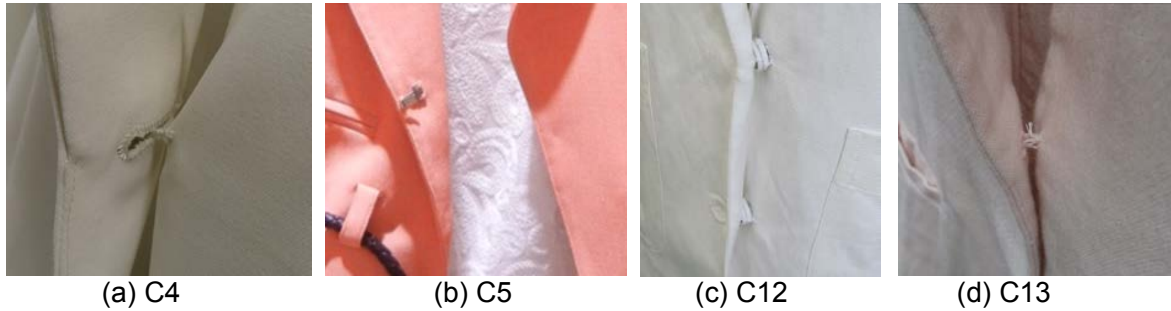


Figure 10: Examples of buttons that are easy to unbutton

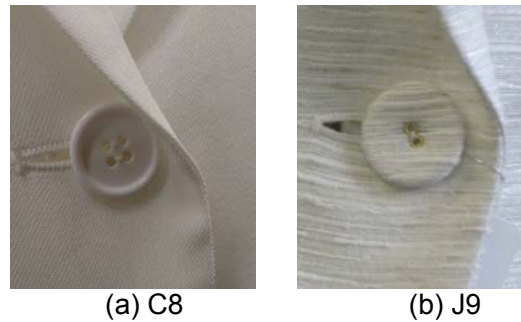


Figure 11: Poor-quality button (left) and high-quality button (right)

4. CONCLUSION

In this study we investigated the salability of Chinese apparel in Japanese department stores. Japanese apparel experts evaluated dresses and jackets purchased in Japanese and Chinese department stores. Half of the Chinese clothing samples were judged as unsalable in Japanese department stores, primarily because the sewing quality was incompatible with Japanese standards, the designs were judged as outdated, and the materials were of low quality. However, the other half of the Chinese clothing samples received high evaluations of salability in Japan because of their designs and sewing quality. In conclusion, to obtain generally higher evaluations, Chinese clothing needs to be improved in the aspects of sewing finish, quality of materials, and design to be salable in the Japanese apparel market. Therefore, it became clear that the difference of the salability in Japan and China. In the view point of preference, outdated design in Japan was considered as not old in China. Chinese customer accepted relatively low level of sewing and material quality. These differences of the preference may be caused by Kansei which bring up by the customers' experience and their culture on fashion. This study will help Chinese and Japanese apparel makers improve the salability of their clothing in both countries.

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