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TAIWANESE' CONSUMER PERCEPTIONS AND INTENTIONS TOWARDS SUSTAINABLE FASHION

PERCEPÇÕES E INTENÇÕES DO CONSUMIDOR TAIWANÊS PARA A MODA SUSTENTÁVEL

Irene Medina and Pedro Correia

ABSTRACT

This study aimed to investigate how Taiwanese' consumer perceptions and purchase intentions towards sustainable fashion apparel guided marketing strategies of sustainability.

The main objective was to analyze Taiwanese' knowledge and concern of sustainability issues identifying Taiwanese consumer's perceptions towards sustainable fashion apparel. Also, the key elements affecting consumer's purchase intentions were researched to understand and formulate a marketing strategy of sustainability for companies to deploy apparel market in Taiwan. This study has confirmed the influence of knowledge, environmental concern, product-related characteristics and social influence on Taiwanese consumers' purchase intentions towards sustainable apparel.

Keywords Consumer; Fashion; Marketing; Sustainability; Taiwan

RESUMO

Este estudo teve como objetivo investigar de que modo as perceções e intenções de compra dos consumidores taiwaneses, relativamente ao vestuário de moda sustentável, orientaram as estratégias de marketing sustentável.

Foi analisado o conhecimento e a preocupação dos taiwaneses nas questões de sustentabilidade, identificando as perceções dos consumidores em relação ao vestuário de moda sustentável. Além disso, foram investigados os principais elementos que afetam as intenções de compra do consumidor para percebê-los e desenvolver uma estratégia de marketing sustentável para que as empresas implementem no mercado de vestuário em Taiwan.

Este estudo confirmou a influência do conhecimento e preocupação ambiental, as características relacionadas com o produto e a influência social nas intenções de compra dos consumidores do Taiwan, relativamente ao vestuário sustentável.

Palavras-chave Consumidor; Marketing; Moda; Sustentabilidade; Taiwan.

1 INTRODUCTION

The sustainability-related issues of the fashion industry have raised public awareness and concern, which drives the demand for eco-friendly and sustainable products (Goworek et al., 2017; Mainolfi 2019).

Many studies investigate consumer perceptions towards sustainability in the fashion industry in western countries (Hill & Lee, 2012; Pookulangara & Shephard, 2013; Joy, 2012; Jin Gam, 2011; Lundblad et al., 2016) whilst limited research targets at eastern countries (Paul et al., 2016; Mainolfi, 2019; Shen et al., 2012). Values affect consumer attitudes and behaviours (Kim et al., 2002; Homer & Kahle, 1988) and the difference in values between consumers in Asia and western countries is known (Podoshen et al., 2011; Wu et al., 2015). The importance of understanding eastern countries regarding consumer perceptions towards sustainability is emerging. Additionally, the global shift from western and developed countries to eastern and developing countries is observed in the market, production and employment of the apparel industry (Dicken, 2003; Jones, 2006). The largest portion of the market is occupied by the developing countries in Asia, especially China (Dicken, 2003). Asia Pacific accounts for 37% of the world apparel and footwear sales in 2018 (Passport, 2019a). Among them, Taiwan is an international market worth research due to its steady economic growth (Taiwan GOV, 2019), ease of doing business (Doing Business, 2020) and expectation of the growing consumer demand boosted by the rise of minimum wage and tourism power (Passport, 2019b). The total population of Taiwan is 23.5 million (M.O.I., 2018) and the disposable income per capita is US$15,938 (Passport, 2020). The sales of apparel and footwear in Taiwan was over NTD 300,000 million in 2018 with CAGR of 2.8% during 2018-2023 (Passport, 2019c). Furthermore, understanding the consumers in Taiwan can provide insights of the Chinese market because of the similarity in cultures, languages, consumer perspectives (Wang & Heitmeyer, 2006; Hung, 2006) and especially consumer purchase behaviours towards apparel (Rahman et al., 2018).

2 LITERATURE REVIEW

2.1. Fashion Market in Taiwan

Taiwan was ranked 18th largest exporter and 17th largest importer of merchandise in 2018 and its nominal GDP was US$15,938 in 2018 (Taiwan GOV, 2019). In 2018, the sales of retailing were NTD 2,826,023 million (Passport, 2019d) and the sales of apparel and footwear was NTD 312,442 million (Passport, 2019b). Fast fashion dominates the major sales of Taiwanese apparel market and Uniqlo is the best-selling brand among womenswear and menswear (Passport, 2019e; Passport, 2019f). Taiwanese enjoy the up-to-date styles, worldwide design, and affordable prices of apparel from fast fashion retailers (Hu & Shiau, 2015).

Given the popularity of fast fashion and the accompanying issues, sustainability-related topics and how consumers perceive the sustainability in the fashion industry are investigated by the large volume of research (Lundblad et al., 2016; Shen et al., 2014; Hill & Lee, 2012; Joy, 2012; Connell, 2011; Jin Gam, 2011). However, very limited research focuses on Taiwanese to explore consumer behaviour towards sustainable products in the fashion industry (Mainolfi, 2019). Mainolfi (2019) expressed Taiwanese will buy sustainable fashion products if they are aware and concern about the environment and perceive themselves as green consumers. Furthermore, the beliefs towards sustainable fashion products foster the willingness to pay more (Mainolfi, 2019). Other research provides the insights of Taiwanese's purchase behaviour towards green products in spite of not focusing on the fashion industry (Mai, 2019; Lu et al., 2015). Mai (2019) applied theory of planned behaviour and noted that social norm is an influential factor affecting purchase intention towards green products. Mai (2019) also observed less joyful or comfortable feeling accompanying by using green products, which implies Taiwanese' negative perceptions of green products regarding its quality. Lu et al., (2015) described a growing number of Taiwanese have environmental awareness and conduct the sustainable behaviour voluntarily. Those people who own ecological awareness demonstrate positive intention to purchase green products.

The above research provides the insights for this study, including consumers' environmental concern, understanding and perceptions of sustainable apparel, the impact of demographic variables and social influence on sustainable purchase behaviour.

2.1. Sustainability in the Fashion Industry

Sustainability has been developed since 1960s when people started worrying about the environmental damage caused by their consumption patterns (Peattie, 1995). In 1987, a famous expression of sustainability or sustainable development was defined from Brundtland's Report as "paths of human progress that meets present needs without compromising the ability of future generations to meet their own needs" (WCED, 1987, p.43), which incorporates the links between environmental and social-economic issues from an anthropocentric point of view. The main challenge of sustainability in business is to balance the three main dimensions of environmental/planet, social/people, and economic/profit (Strähle, 2017; Wilson, 2015): In environmental aspect, the focus is to reduce the impact on the environment and keep the natural resource, such as better waste control, recycling and eco-friendly agriculture; In social aspect, the actions are taken like maintaining human rights, equality, fair labour treatment and corporate social responsibility; In economic aspect, the challenge is to achieve financial feasibility and keep social and environmental sustainable in the same time (Muthu, 2019).

The fashion market is synonymous with fast change. The research observes the key traits of fashion market are short life cycles, high volatility, low predictability, high impulse purchasing (Christopher et al., 2014). Accounting for 20-35% of microplastic pollution in the ocean, 20% of the waste water and 10% of carbon emission in the world ((BoF and McKinsey, 2019), the fashion industry is one of the most resource-consuming and polluting industries. The main issues in the fashion industry are the use of pesticides, unsustainable resources of the raw materials, environmental pollutions, carbon emission, unfair employment, depletion of natural resources, excessive consumption and environmental impacts caused by clothing maintenance and disposal (Goworek et al., 2017; Strähle, 2017; Watson et al., 2016). As the fast fashion rises in the past decade, the sustainability becomes matter in the fashion industry (Joy et al., 2012).

3 METHODOLOGY

3.1. Research Philosophy and Approach

The aim of this study is to investigate consumer perceptions and purchase intentions towards sustainable fashion apparel. Therefore, it directs this study towards an interpretivist paradigm because interpretivism is supported by the concept that social reality is formed by the subjective perceptions of people (Collis et al., 2013).

To fill the gap of a lack of study in eastern countries, the qualitative data was collected statistically and subsequently used to test the three hypotheses affecting consumer purchase intentions from above literature review i.e. consumer knowledge and concern (Jin Gam et al., 2011; Shen et al., 2013; Mainolfi, 2019), physical characteristics of sustainable apparel (Chan et al., 2012) and social influence (Yan, 2012; McNeill, 2015). The data collection of consumer purchase intentions and testing of the hypotheses guide this study as an abductive approach, in which data is used for exploration of phenomena and test at the existing framework (Saunders et al., 2019).

3.2. Research Strategy and Design

To investigate the social phenomena (Denscombe, 2017) regarding consumer purchase intentions and collect statistics data (Collis et al., 2013), a survey was conducted. The population is generic Taiwanese who ever purchased apparel within one year. Apart from collecting consumer perceptions as independent variables and consumer purchase intentions as dependent variables, the demographic data i.e. age, gender and monthly income of participants (Chan et al., 2012; Shen et al., 2012) was collected as the control variables (Punch, 2005).

3.3. Data Collection and Analysis

The method of the survey was an online self-completion questionnaire with seven-point Likert scales (Teater et al., 2017). Convenience sampling and a pragmatic approach for sample size (Denscombe, 2017) was adopted to collect feedback from 100 generic Taiwanese consumers. The data was analysed through multiple linear recession models in SPSS (Teater et al., 2017).

4 LIMITATIONS

The study focuses on Taiwanese' consumer perceptions and purchase intentions towards sustainable fashion apparel from three perspectives, consumer awareness, physical characteristics of sustainable apparel, and prices versus social influence. However, the factors such as brand name and messages (Yan, 2012), advertising (Beard, 2008), and consumer self-esteem (Lundblad et al., 2016), transparency in supply chain (Bhaduri et al., 2011) are not discussed. Moreover, this study adopts the framework from prior studies without open questions to explore beyond the framework. Future research can further expand its scope and coverage to consider other eastern countries.

5 CONCLUDING REMARKS

This study has confirmed the influence of knowledge, environmental concern, product-related characteristics and social influence on Taiwanese consumers' purchase intentions towards sustainable apparel and evaluated demographic factors did not show significant relationship to consumers' purchase intentions. The influence of each individual factor and insights from qualitative data are presented below.

The results confirmed knowledge has a positive influence on consumers' purchase intentions, which is in accord with previous studies (Dickson, 2000; Shen et al., 2012). In CDMP, knowledge is involved in the first stage of problem recognition and information search. Consumers are likely to change their behaviours when receiving information which stimulate them to think differently about their consumption. However, Taiwanese consumers are found lack of knowledge of sustainability or only have rough concepts. Meanwhile, little information of retailers who sell sustainable apparel is available. Lack of concrete knowledge can lead to the barrier to consumers' sustainable consumption (Connell, 2010). Conversely, greater knowledge help consumers to expand the choice they have. The results imply improving knowledge and understanding of sustainable fashion has potential of encourage sustainable purchase behaviour. Moreover, information popularisation of sustainable fashion and an appropriate retail environment are required.

Environmental concern was confirmed to positively affect consumers' purchase intentions on sustainable apparel, which supports the work of other studies in this area (Jin Gam, 2011; Paul et al., 2016). In CDMP, environmental concern reflects in the first stage of problem recognition. Consumers with environmental concern may search related information and then purchase sustainable apparel. The results from interviews note that consumers who concerned environmental issues showed proactive attitudes in searching related information. Although Bamberg (2003) notes environmental concern is an indirect determinant of environmental behaviour, the recent research argues the direct and significant influence of environmental concern on consumers' purchase intentions (Pagiaslis & Krontalis, 2014), which is consistent to the results in this study. Furthermore, high degree of environmental concern is found among Taiwanese consumers. Combining all the findings, it therefore raises the possibility of developing sustainable fashion in Taiwan.

The importance and satisfaction of product-related characteristics of sustainable apparel were confirmed to affect consumers' purchase intentions negatively and positively, respectively. The results are in line with previous studies that price, quality and design of sustainable apparel affect consumer purchase behaviour (Shaw et al., 2006; Carrigan & Attalla, 2001; Joy et al., 2012). Reflecting in CDMP, product-related characteristics is involved in the stage of alternative evaluation. Taiwanese consumers show the high degree of emphasis of product attributes and perceive sustainable apparel are with high price, ordinary design and quality, which are assumed to be the barriers of buying sustainable apparel. Additionally, sustainability is scored as the last important item among Taiwanese consumers when purchasing sustainable apparel, which corroborates the findings of the previous work (Joergens, 2006) that consumers' personal needs take precedence over sustainability consideration when purchasing apparel. Price is often regarded as the first criteria when choosing sustainable apparel (Meyer, 2001). Interestingly, the importance of quality and design are at comparable level with price among Taiwanese consumers, which can be attributed to the previous research that consumers construct their identity and express themselves through clothing choices (Niinimäki, 2010) and therefore the functional values cannot be compromised. To encourage consumers to support sustainable apparel, addressing consumers' needs and promoting product-related characteristics may be more effective measures than promoting sustainability only.

The results confirmed social influence has positive impact on consumers' purchase intentions towards sustainable apparel, which is consistent to previous research (Salazar et al., 2013). Consumers receiving positive information from their social group during evaluation of alternatives in CDMP are more likely to purchase sustainable apparel. This type of social influence belongs to informative social influence (Deutsch & Gerard, 1955). Although social influence is at medium to high level, Taiwanese consumers seldom receive sustainability-related information from social groups, which echoes the findings in this study that blurred

knowledge and no-to-low available information of sustainability. The results imply improving consumers' knowledge of sustainable apparel may further reinforce the effect of social influence.

Besides the four aspects discussed over the proposed framework, some insights were revealed during the interviews. Scepticism of greenwashing is one of the barriers prevent sustainable purchase behaviour (Kostadinova, 2016) and is found in this study. Taiwanese consumers are worried about fake sustainable apparel and the conflict between claiming adoptions of sustainability and updating collections of apparel frequently. Additionally, brand preference (Young et al., 2010) and admiring a certain type of lifestyle (Moisander & Pesonen, 2002) affect consumers' purchase decisions, which are consistent to what described by the interviewees. Consumers link to the desired lifestyle and express themselves by the apparel they purchase (Niinimäki, 2010).

The adoption of a mix-method design helped to address the aim and corresponding objectives in this study. The quantitative results attained the objectives of understanding consumers' knowledge, environmental concern and perceptions towards sustainable fashion. Testing hypotheses achieved the objective of investigating key factors affecting consumers' purchase intentions and confirmed the influence of knowledge, environmental concern, product-related characteristics and social influence. Subsequentially, the qualitative results further underpinned the hypotheses, provided insights beyond the framework and enriched the extent to which marketing strategy of sustainable fashion can formulate. Overall, this study has established the prototype of Taiwanese consumers regarding their perceptions towards sustainable apparel and key factors affecting their purchase behaviour.

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