

Maximizing the Potential of Digital Commerce for the Marketing of Chinese Fashion Apparels

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Abstract

Original Research Article

Digital commerce is growing rapidly in China and Chinese fashion apparel firms are focusing on digital marketing and social media networks to promote their brands and meet their customers' specific needs. This article reviews the literature on the adoption of digital commerce and digital marketing by firms in the Chinese fashion apparel industry. **Methodology:** A comprehensive literature review was conducted and content analysis was used as it permits the analysis of large amounts of textual information to systematically identify properties. **Results:** The findings revealed that fashion firms have to adopt and implement appropriate strategies to address the challenges faced in a highly competitive domestic and international market. Since online retailing is the fastest growing retail channel for apparel, they have to emphasize on digital and social media marketing to gain competitive advantage, to drive growth and to gain reputational advantage. Digital marketing also can be used as a promotional tool to strengthen customer relationships. **Conclusion/- and Recommendations:** Digital marketing can rapidly reach a large number of customers at low cost, generate prompt results, and provide for accessibility 24 hours per day. Based on the findings, it is recommended that Chinese fashion firms emphasize on digital marketing and the social media as marketing modalities. Digital marketing also can be used as a promotional tool to strengthen customer for their purchases of fashion products.

Keywords: Fashion firms, Digital marketing, Social Media, Literature review, Content analysis.

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INTRODUCTION

The global fashion industry is growing rapidly, largely because of increasing buying power in the developing markets [1]. Viewing fashions as an expression of their new lifestyles, the forecast is for them to spend \$600 billion by 2020 in the luxury goods segment. Of these, Chinese consumers are expected to accounts for three quarter of all sales [2]. China's online retail market is the world's largest and e-commerce accounted for 13.5 percent of all retail spending in 2015 [3].

Digitalization is changing business models and the way of conducting business [4]. Increasingly enterprises are engaging in digital commerce to generate demand, control the supply chain and enhance the customer experience. Because of the growing importance of digital commerce and social commerce, including M-commerce, firms are creating virtual storefronts on websites with online catalogues and the digital marketing of products in the global market [5]. Chinese fashion apparel firms that emphasize on digitalization are benefiting from the Chinese

consumers growing demand for new technologies, products and user experiences [6].

This paper is structured as follows. Section 2 reviews the literature on i) the Chinese fashion items industry; ii) digital commerce, M-commerce and social commerce in China; iii) digital marketing in the Chinese apparel industry; iv) the emerging challenges; v) pertinent theories and prior research. Section 3 outlines the research methodology, Section 4 presents and discusses the salient findings while the final Section 5 draws conclusions and offers recommendations.

LITERATURE REVIEW

The Chinese Fashion Items Industry

China, the world's largest garment producer and exporter, account for one third of global production. By 2012, China captured 29% of the global market with exports to 195 countries [7]. The emergence of a Chinese middle class is boosting the demand for fashion apparel goods in China (Daxueconsulting, November 17th, 2016), and spending on fashion items is forecasted to reach US\$371 billion by 2021 [8].

China is also the largest market for mass fashion which are low cost clothing collections that copy current luxury fashion trends [9]. Globally, the demand for luxury branded clothing market is also growing due to the democratization of luxury goods [10] and the emergence of new reasonably priced luxury brands which are affordable to a large group of customers [11]. In line with this trend, China has also become a fashion hub for luxury consumption as reflected by the Annual Fashion Weeks is held in Shanghai, Beijing, Shenzhen, Chongqing and Guangzhou. These events promote the creations of local designers, who are producing high end fashions with their own brands, are attracting a large customer base [12].

Several large Chinese apparel firms now dominate the apparel market and in terms of sales revenue, the market leaders are Belle international, Jihua Group, Heilan Home and Shenzhou International Group. The Shanshan Group, ranked third in clothing sales in China, has entered into new markets segments and performed well by offering quality fashion apparel at low prices. Younger, the top apparel firm in sales ranking has a network of 370 direct management stores and 500 franchised retail stores [13].

Some leading Chinese fashion firms have successfully ventured into overseas retail markets. These include the EOP Fashion Group which has 940 stores in China and 20 in the overseas market. Its high Mo&Co line, is sold by leading retailers worldwide including Selfridges in London and Galeries Lafayette in Paris with sales of US\$554million. Others leading firms are Dazzle fashion which has more than 1,000 store across the country and the JNBY Group with 700 stores worldwide [8].

Digital commerce, M-commerce and social commerce in China

Digital commerce provides enterprises opportunities for redefining their overall strategy [14]. This is reflected in the definition of digital commerce,

“the buying and selling of goods and services using the Internet, mobile networks and commerce infrastructure. It includes research and marketing activities that support these transactions, including the people, processes and technologies to execute at all touch points throughout the customer buying journey” [15].

Digital marketing is an important modality for enterprises to reach out and engage with their customers. Digital marketing enables enterprises to effectively and efficiently market their products and services in an integrated way. It can be defined as *“an adaptive, technology-enabled process by which firms collaborate with customers and partners to jointly*

create, communicate, deliver, and sustain value for all stakeholders” [16].

China is the largest e-commerce market in the world [17], with 772 million people or 52% of its total population having access to the internet in 2017 [13]. China’s total retail sales were \$4.227 trillion in 2015 while e-commerce sales were at a \$634 billion high [18]. Online retailing is expected to grow from 17% of the total volume and the value of retail sales in 2017 to reach 25% by 2020 [19]. Chinese fashion houses are embracing e-commerce platforms as the New Retail Revolution gather pace [17].

Online retailing is the fastest growing retail channel for apparels. The China e-business Research Center reported that the total online apparel transaction value in China grew sharply by 42.6% to reach 434.9 billion yuan in 2013. There is a big demand for mobile networks and the total number of 4G network users rose to 1.08 billion in April 2018 [20]. Consumer demands are changing rapidly. In order to meet their needs and preferences as well as to deliver a superior customer experience, firms are enhancing their digital commerce capabilities by utilizing the latest technologies. They are also emphasizing on technology enablers who include data analytics, product and web content management systems, payments, order management and logistics planning [21].

Mobile advertising is also increasing as reflected by the growth of the mobile advertisement platform market from 1.26 billion yuan in 2012 to reach 10.54 billion yuan in 2016 [18]. In China, 41% of consumers use social platforms as a way to receive promotional and marketing information as compared to 34% globally [22].

Social commerce comprises collaborative tools for shopping and these include shared pick lists, user ratings, user-generated shared content sharing of online product information and advice [23]. Additionally, the use of social commerce, involves online media that support social interaction and user contributions to facilitate the online transactions of products and services [24].

Social media networks are useful for developing social relationships among people. Social media can be used by businesses to effectively engage with existing and prospective customers [25]. It can therefore be considered as another form of word of mouth (WOM) for products, services or providers that can influence the purchasing decisions of consumers in the e-commerce environment [26]. There are different forms of social media and these include virtual communities, web-blogs, micro-blogs, wikis, video sharing, social networking sites and social application [23]. Social media has therefore emerged as an

important marketing tool in several countries, in particular China [27].

Social media plays a pivotal role in the marketing of fashion products and firms in the apparel industry as it can establish linkages and create relationships with customers [28]. Chinese apparel firms are now emphasizing on social engagement for meeting customer demands, as part of e-commerce [17].

Digital marketing in the Chinese apparel industry

“The twofold goal of marketing is to attract new customers by promising superior value, keeping and growing current customers by delivering satisfaction”[29]. The growth of the internet has changed the concept of marketing with consumers moving away from the traditional promotional channels of magazines, newspapers, television and radio to the Internet. A more recent shift is to computers, mobile phones, tablets, game consoles, and other portable devices and these demonstrate that the new era of marketing has a digital form [30].

Digital marketing is enabled by a series of adaptive digital touchpoints encompassing the marketing activity, institutions, processes and customers. Significantly, the number of touchpoints is increasing by over 20% annually as more offline customers shift to digital technologies in particular the younger, digitally oriented consumers [31]. Digital marketing and social media marketing strategies are therefore important modalities for firms in the apparel industry to reach out to a large customer base to create new contexts, build their brand image and better cater to their customers’ specific needs [2]. Since customers are increasingly relying on social media for their purchases, effective social media marketing strategies can positively impact on enterprises in terms of their growth and performance [32].

Concurrently, digital technologies are transforming the fashion industry business as they open up new opportunities to drive growth, increase efficiency and enable businesses to take advantage of domestic and export market [33]. In China, fashion houses are going digital in order to bridge the gap between customer expectations and their actual experiences [22]. Two significant trends are emerging. The first is “Showrooming” with physical stores in shopping malls becoming the fitting rooms for consumer to try before they purchase online [27]. The second is the New Retail which refers to the integration of online and offline shopping experiences is gathering pace in China with fashion houses embracing e-commerce platforms [17].

The emerging challenges

The fashion industry landscape is continuously changing. Fashion consumers seek a seamless shopping experience and these are challenges for retailers [2].

Customers increasingly prefer good brands that they can be associated with. However, there are some negative connotations of the “Made in China” label. Furthermore, in international markets, there is a low awareness of China’s apparel brands [7].

The situation compels Chinese apparel firms to i) improve their branding and marketing strategies including digital marketing [3]; ii) create brands for brand positioning to identify differences between competitors and for the target market to be aware of the differences between its brand and its competitors [29]; iii) enhance their design and innovation capacities; iv) adopt new technologies to enhance the “Created in China” brand to successfully market their products globally [34]; v) cater to the growing demands of the new generation of consumers for individualized products [35].

The 4th Industrial Revolution (IR4.0) is impacting on the fashion apparel industry. The IR 4.0 refers to the shift toward digitalization as advancement in technology, including the internet of things (IoT), artificial intelligent (AI) and automation. Enterprises have to be innovative with new business models to remain competitive in the domestic and global markets [34]. They also have to improve their market position through new designs, service provision and innovative marketing strategies. Most significant are online via multi-channel activities [36-28].

The Chinese domestic fashion market is highly competitive. This compels Chinese fashion apparel enterprises to increasingly emphasize on internationalization by venturing into new regional and global markets with supportive marketing and retailing strategies [3]. Successful internationalization is also dependent on Chinese apparel firms being able to predict the behavioral variables that influence fashion-oriented impulse buying behavior [39].

Chinese fashion firms that venture abroad have to determine the fashion trends and styles that target customer seek. This requires them to emphasis on big data and relies on its analysis as big data can generate innovative ideas and concepts [40]. Big data can be defined as a combination of technologies that help to capture the data is pertinent for each industry from different sources like text, audio, images and video. Since big data processing requires the deployment and integration of many resources, it requires hug investments [41].

Pertinent prior research

There are several industrial reports and much prior research on the Chinese apparel industry as well as on the use of social media as a marketing tool in the domestic market. These emphasize the importance for enterprises to engage with their customers through social media [42] as well as segmentation, customer

orientation, targeting and positioning [43]. The findings of another study by Accenture [6] revealed that Chinese industries can benefit from significant gains by embracing digitalization because of the Chinese consumers' growing use and demand for new technologies, new products and new user experiences. Research conducted by Richardson *et al.* [44] found that social media marketing offer business a less costly platform to reach new customers and maintain relationships with existing customers.

The findings of a study by Wei, Lee & Shen [45] on the predictors of consumers' motivation to buy clothing online in China revealed that a majority of shoppers' participated in the e-commerce marketplace, and clothing is one of the most frequently purchased items. Guo, Ling and Liu [45] researched the eight determinants of consumer satisfaction in the online shopping environment in China. These were website design, security, information quality, payment method, e-service quality, product quality, product variety, and delivery service positively influenced customer satisfaction. The results of this research enriched the theoretical body of knowledge that related to the online business environment in China.

Omni-channel retailing is a growing feature of marketing in the Chinese fashion industry. Ye, Lau and Teo [46] explored the drivers and barriers to omni-channel retailing in China, to understand how companies formulate their business strategies during their transformations to omni-channel retailing. Using two Chinese fashion apparel firms as case studies, they identified a set of drivers and barriers for omni-channel retailing, and classified them into the categories of marketing, logistics, supply chain and organizational management. The implications of e-commerce on reducing entry barriers to enable firms to move up the value chain by using the global value chain framework were examined by Li, Frederick and Gereffi [47]. Their findings revealed that e-commerce has created "two-sided markets". The "engaged consumers" constitute the demand side of this market, while apparel firms" are the supply side.

An efficient supply chain management framework is critical for influencing customer's satisfaction in the fashion industry. Ye and Lau [33] designed a demand chain management framework for the fashion apparel industry using the alignment theory. Their findings revealed that companies with better market management, supply chain management and organization management appeared to perform better under the rapidly changing economic conditions in China. Equally important is effective clothing network marketing since it is increasingly bring accepted by the majority of consumers, and applied rapidly to the field of clothing marketing. The advantages and disadvantages of clothing networks were examined by Zhao and Zhou [48] and they recommended that fashion

clothing firms should standardize identification, perfect the virtual fitting system, improve logistics system and establish brand stores online.

Chinese fashion firms face the challenge of developing and promoting branded products originating from China. The findings of the study by Nikolai [49] examined the challenges revealed that although many international retailers have successfully penetrated Chinese consumer markets, China's own brands experience difficulties in achieving local recognition and to better perform in overseas markets.

RESEARCH METHODOLOGY

This study was centred on a comprehensive review of the pertinent literature to systematically investigate a set of issues. The reviewed literature included journal articles, newspaper reports, textbooks and prior research including industry reports, business reports undertaken on the global apparel export industry, the Chinese fashion industry, branding, digital marketing, and marketing, strategic management and internationalization theories. Content analysis was then used generate the findings, as it permits the analysis of large amounts of textual information to systematically identify properties which include words, concepts, characters, themes or sentences [50]. This approach was considered appropriate to meet the purposes of this paper.

SALIENT FINDINGS

This subsection highlights the salient findings that emerged from the reviewed literature.

Government Policies

There are appropriate policies in the 13th Five-Year Plan (2016-2020) to rebalance the economy with a focus on the quality of growth. Policies are in place to promote consumption driven economic growth. While this will stimulate demand for goods including fashions, a more liberal import policy would result in the entry of more foreign fashion brands leading to more intense competition.

The changing fashion market landscape

The rapid growth of e-commerce, e-business and social media are changing the Chinese fashion market landscape. The departmental stores are now being replaced by innovative retail formats, while B2C e-commerce has emerged as a new "competition front" of clothing enterprises [3]. There is a rapid growth of online shopping for fashion apparels initiated from social media platforms. Fashion firms are increasingly using O2O to win customers. A popular interface is the WeChat account and 60% of WeChat shoppers bought their fashion apparel online [3].

Branding and Integrated Marketing Communication (IMC)

Brands help consumers to evaluate the quality of a product before making the purchase decision can therefore reduce a buyer's perceived risk of purchase [42]. A brand offers the firms legal protection for unique features or aspects of the product [51]. Since brands have to be promoted to create awareness among potential buyers. Chinese fashion firms have to emphasize on IMC which is a firm specific capability with an underlying process that may be deeply embedded in organizational routines and practices [4, 52]. They also have to adopt innovative forms of digital marketing to meet the specific needs of their consumers [53], and revise IMC strategies to enable the market to see and hear the brand for gaining long term brand value [54].

E-IMC has become a major constituent expect of IMC [55]. The E-IMC is a two way channels of communication [56] for developing and maintaining strong beneficial relationships with all stakeholders through ongoing two-way dynamic dialogue and communications. The aim is to have definite positive impact on sales and profits [57]. The findings therefore suggest that fashion firms have to develop IMC capabilities, and create targeted campaigns to engage customers to a much greater extent than traditional media [58].

Significant Emerging Trends

The changing fashion market landscape underlines the need for Chinese fashion firms to change their business models, strengthen supply chain management as well as to emphasize on customer relationship management and marketing. With the social media network becoming an important marketing modality [22]. Newsfeed advertising is gaining much attention with mobile news feed ads becoming the preferred marketing tactic [59]. There is also growing emphasis on artificial intelligent (AI) to predict consumer demands [60]. In parallel, big data analytics are creating new business opportunities across the fashion value chain, in areas such as dynamic pricing to optimize product replenishment [35].

The Internationalization of Chinese Fashion Firms

Chinese fashion firms are increasingly entering and expanding their international presence because of competitive pressures and industry volatility. The pull factors are reduced transaction costs, economics scale, increased revenues from foreign markets, trade liberalization and technological advances. They use different foreign market entry modes to penetrate international markets and Firms like Trendy and Ellassay used the equity entry mode. Several Chinese fashion firms including SMCP have acquired western brands, as they are better positioned in the global market place [1].

CONCLUSION AND RECOMMENDATIONS

This study reviewed the literature related to the adoption of digital commerce and digital marketing by Chinese fashion apparel firms. The findings indicated that there is much potential to enhance their business performance in the domestic and export markets, as a raising personal incomes are boosting demand for fashion apparel in particular fast fashion. Another supportive factor is the rapid growth of online shopping for fashion apparels initiated from social platforms and digital marketing.

However, Chinese fashion apparel firms have to contend with intense competition in a changing fashion market landscape. This requires them to emphasize on customer relationship management through dynamic dialogue and communications. They also have to penetrate new market and meet the specific demands of their customers through adoption of big data analytics and align their supply chains to manufacture and supply the latest designs at lower prices with shorter delivery times. Equally important, they have to maximize the potential of digital marketing and e-IMC by taking advantage of new media channels to target specific segments and promote their brands.

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