ONLINE CONSUMER SATISFACTION ABOUT FASHION INDUSTRY IN VIETNAM

SỰ HÀI LÒNG CỦA NGƯỜI TIÊU DÙNG TRỰC TUYẾN TRONG NGÀNH THỜI TRANG Ở VIỆT NAM

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Tóm tắt

Mục đích của bài báo này là tìm ra các yếu tố ảnh hưởng đến sự hài lòng của người tiêu dùng trực tuyến trong ngành thời trang ở Việt Nam và kiểm tra mối quan hệ giữa các yếu tố này và sự hài lòng của người tiêu dùng trực tuyến trong ngành thời trang Việt Nam. Sáu biến ảnh hưởng có thể được xem xét gồm công nghệ, trang web, sản phẩm, hoạt động tiếp thị, phân phối và thanh toán đã được nghiên cứu. Trong nghiên cứu này, các tác giả đã thu thập và phân tích dữ liệu bằng cách sử dụng phương pháp định lượng. Phần mềm SPSS được sử dụng để phân tích dữ liệu. Kết quả của nghiên cứu này là sáu yếu tố được xác định có ảnh hưởng đến sự hài lòng của người tiêu dùng trực tuyến. Các nhận thức khác nhau về sự hài lòng thuộc về các tính năng nhân khẩu học khác nhau của mỗi nhóm người tiêu dùng trực tuyến cũng đã được tìm thấy trong nghiên cứu này. Một hạn chế của nghiên cứu này là 90% các câu trả lời thuộc về các nhóm sinh viên và nhân viên văn phòng trẻ dưới 35 tuổi, nhưng nghiên cứu không bao gồm nhóm thiết bị di động mà chiếm tới 1,45 điện thoại di động / người (2014). Nghiên cứu trong tương lai có thể được tiến hành trong lĩnh vực thương mại điện tử di động để phản biện lại vấn đề này. Nghiên cứu này đã đưa ra hai khuyến nghị cho thương nhân điện tử / các doanh nghiệp liên quan trong ngành công nghiệp thời trang và các cơ quan quản lý nhà nước.

Từ khóa: *thương mại điện tử, các sản phẩm thời trang trực tuyến, thị trường Việt Nam, sự hài lòng của người tiêu dùng trực tuyến, sự hài lòng của người tiêu dùng điện tử.*

Summary

The purpose of this paper was to find out influential factors related to online consumer satisfaction about the fashion industry in Vietnam and test the relationships between these factors and the satisfaction of online consumers in the Vietnamese fashion sector. Six possible influencing variables are considered: technology, website, products, marketing activities, delivery, and payment were investigated. In this study, the authors collected and analyzed data using a quantitative approach. SPSS software was used to analyze data. The results of the study were that six identified factors do have influences on online consumer satisfaction. Different perceptions on the satisfaction that belongs to different demographic features of each online consumer group also have been found from the research. A limitation of this study is that 90% of the responses belong to the groups of students and young office employees with age under 35, but the study did not cover the mobile devices group, which counted for 1.45 mobiles/ person (2014). Future research may be conducted in the sector of mobile e-commerce to counter this problem. Two recommendations to e-traders/ related businesses in the fashion industry and state management agencies were stated.

Keywords: *e-commerce, online fashion products, Vietnam market, online consumer satisfaction, e-consumer satisfaction.*

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Introduction

Research Background

Vietnam has been witnessing a rapid development since the free-trade movement in 1986 as part of the preparation to finally become a member of the World Trade Organization (WTO) in 2007. Fashion is the leading industry in the global integration of Vietnam, and this sector has been developing continuously with the highest growth rate. According to the Ministry of Industry and Trade (MOIT) of Vietnam in its 2014 annual report, the fashion industry, which includes textile, garment, shoes, and accessories sectors, plays a crucial role in Vietnam's economy. This industry currently employs more than 3.5 million Vietnamese, accounting for more than 15% of the total workforce in the industrial sector. On the other hand, fashion items have been the main contributor to the export's turn-over of Vietnam for several years. In 2014, the export's turn-over of the fashion industry was 36.37 billion of USD, accounting for 24.2% of the total export's turn-over of Vietnam.

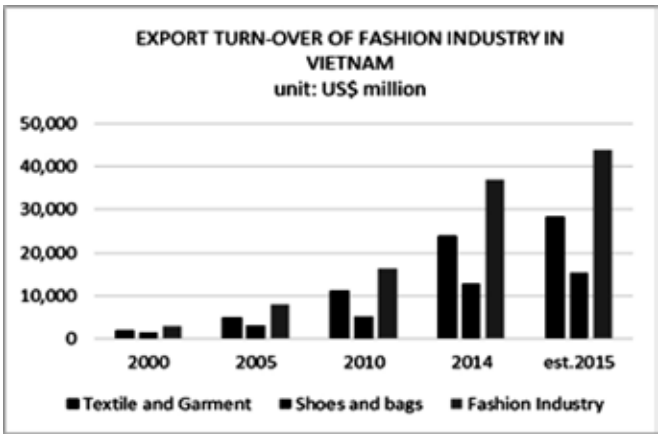


Figure 1: Export turnover of the Vietnam Fashion Industry
Source: MOIT of Vietnam

The Vietnam Government sees the importance of the fashion industry in the economy of Vietnam and therefore pays more attention towards the development strategy for the industry. The Ministry of Industry and Trade also set up a master plan for the development of the fashion industry with the average growth rate of 12% during 2015-2020. An important pillar of this strategy is to improve consumer's satisfaction with an aim to improve the retail market both for conventional and e-commerce markets.



Figure 2: B2C sales volume/ total retail sales

Consumer satisfaction is a popular concept in marketing. It is a measure of how products or services meet the buyer's expectation. This concept normally is considered as consumer's expectations prior to purchase or use of a product and the relative perception of the quality of that product after using it.

Consumer satisfaction is very important because of its close relationship with consumer loyalty and the profitability of a business. Loyalty behaviors include continuous relationship and recommendations (word of mouth advertising) of the product. As a result, for a loyal consumer, the quality of value received from one supplier is greater than that available from the others (Roger Hallowell, 2006).

Consumer satisfaction is more important in the e-commerce side of the fashion industry because of the higher expectation of the buyer. For example, the potential buyer can only see a fashion product with its design and color on websites but does not know if the product will fit his/her body and if its feeling (aesthetic feel or tactile quality) is good. That explains why there are more buyers nowadays who look up information about fashion products through websites and then go to the store in town to try and buy them.

Problem statements

Vietnam is at the pivotal stage of developing the e-commerce owing to its large population and the rapid growth of Internet users. Shopping online now in Vietnam is a new lifestyle that has been attracting a lot of young people who enjoy chatting with social networks while shopping. The Vietnam E-commerce and Informatics Technology Agency (VECITA) predicted that the B2C trade volume ratio of total retail sales of goods and services in Vietnam will increase by 5% within the next five years.

Although online fashion trading covers a relatively big share of the world's online transactions, it seems that this business is still quite quiet in Vietnam at the moment. There are many Vietnamese Internet users who surf the web, find needed information on desired goods and then go to buy the items at conventional stores.

Internet user/ population

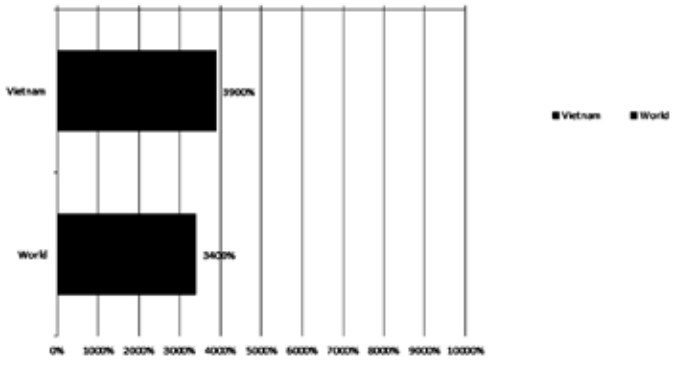


Figure 3: Internet users in Vietnam compared to the world's average

There are many problems that might hinder shoppers in Vietnam from shopping online, namely:

(i) Existing website technology does not support online shoppers very well. Internet users in Vietnam normally complain about the internet speed to access to information. Sometimes, they got troubles in activating the website and finding the necessary information. Online shoppers in Vietnam are also worried about the security of websites as their personal, and financial information could be stolen by hackers. Many online shoppers choose to pay cash when receiving products to avoid risks related to online trading (Google, 2014).

(ii) Websites that can attract online shoppers with abundant information with attractive and tempting product's photos are quite little. At the moment, there are not many websites that can provide 3D-photos of the product's details. Young people prefer to chat and communicate with others while shopping on the internet, but most B2C websites in Vietnam are yet to be able to satisfy them.

(iii) There are also concerns about the real quality and size specifications versus advertised online quality of fashion products. The price of online products is also an important factor when most consumers want to buy products at a cheaper price compared to those sold at conventional stores.

(iv) Most B2C online retailers do not have good marketing strategies to advertise their brands and identities in the market as well as to appeal to buyers to come back again. Many websites do not allow buyers to return purchased goods even in cases of poor quality.

(v) Online fashion business does not have any logistic power which makes them unable to control the delivering of products. Most deliveries are late against being promised by online fashion business.

Research Questions

The paper attempts to answer three main research questions:

- What are influential factors on online consumer satisfaction in the fashion industry in Vietnam?

- How do these influential factors affect the satisfaction of online consumers in the fashion industry in Vietnam?

- What recommendations can be given to satisfy online consumers in the fashion industry in Vietnam?

Literature Review

With the advancement of technology, the development of the online shopping market is marked by the appearance of many retail websites that offer a variety of products and services. As defined by Choi, Stalh, and Whiston (1997), e-commerce is a "process of seeking for product information, ordering products as well as paying for goods and services". Nowadays, the consumers can approach fully to the technological development of the Internet. They begin to use online platforms for information search to seek for available products as well as suitable services (Tim Jackson & David Shaw, 2009). However, it was found that consumers spend less time accessing to fashion brand's websites than going to an actual store. Therefore, the main channels of selling products and services are still conventional physical stores. By expanding their reputation via the internet, these retailers can maximize their market coverage.

According to Edwards (2007), there are four main reasons for most people to decide to buy products online – money, time-saving, convenience, an indispensable shopping trends. People spend a considerable amount of money buying stylish clothes, perfumes, books and especially acne treatments because they want to feel better about themselves and be more confident in social situations. As stated by Anamika in 2012, whatever organizations do to boost their sales, it's all because they want to convince consumers about their ability to create good products as well as to save money for

clients. Besides, it also helps consumers to feel how clever they are when they decide to purchase a product from the company.

Many years ago, many researchers investigated the buying habit of consumers relying on the decision-making process. Up to 1979, Bettman pointed out that this type of action was actually simpler than everyone had ever thought. He stated that "consumers may sometimes typically rely on simple strategies rather than going through a series of steps or processes rationally when they made purchase decisions". To prove it, Sproles examined some typical obvious dimensions or characteristics (Sproles, 1985). In 1986, Sproles and Kendall firstly publicized their study on investigating consumer decision-making processes by classifying consumers into different decision-making styles. Interestingly, some of these consumers have been seen to be highly correlated with some product characteristics (price, country of origin and brand). It is to say that the apparel's product characteristics can always be determined by consumers. They have the right to give the ultimate purchase acceptance or rejection (Sproles, 1979).

Consumer decision-making styles are patterned, mental and cognitive orientations. It will dominate the consumer's approach in making purchase choices (Sproles, 1985; Sproles and Kendall, 1986). A model of the style's concept which composed of eight mental orientations was established by Sproles and Kendall (1986). These are: "perfectionism consciousness", "brand consciousness", "novelty and fashion consciousness", "recreational and hedonistic shopping consciousness", "price and value consciousness", "impulsive and careless consumer", "confused by over choice consumer" and "habitual and brand loyal consumer".

Consumers usually use price expectations in their purchase decision for a product. The expectations of price are then used as reference points to compare with store prices and make purchase decisions (Monroe 1973).

In reality, the role of fashion websites has been evolving with time. Pastore (2000) did a study on 500 Internet users on purchasing behavior. The research found that 41% of consumer confirmed they shopped for clothing online at least once a month, while 56% purchased at least once online. It means that approximately 40% of online shoppers were expected to buy more clothing online in the future (Pastore, 2000).

Many researchers have suggested that the quality of the product and service information that companies offer on the website play a very important role in their purchase decision (Berthon et al., 1996; Geissler, 2001; Korner& Zimmermann, 2000; Selz, 1998). Then some experts stated that the website is more conducive to relationship marketing compared to media tools such as direct mail and catalogs (Geissler, 2001; Shetty, 1999). The reason is that via websites, companies can introduce new chances to establish, build and manage relationships with their consumers.

Nowadays, one of the most important issues concerning all businesses is consumer satisfaction. It is the principle of the continuous improvement in the modern enterprise to measure how well a company does to satisfy consumers demands. Another reason is consumer satisfaction should be measured and translated into some measurable parameter. As a result, the consumer satisfaction measurement may be used as the most reliable feedback. It provides client' preferences and experiences in an effective, direct, meaningful and objective way.

Hence, it will lead to the consideration that consumer satisfaction is a baseline standard of performance as well as a possible standard of excellence for any business organization (Gerson, 1993).

In Vietnam, online payment is yet to be popular because of the trust in the security for customers. Several researches have been done in Vietnam on e-commerce on in different businesses and topics. In 2014, Google Vietnam did a research on the behaviors of Vietnamese online shoppers. According to their report, there are 71% of online shoppers who pay cash when receiving goods. It was found that Vietnamese buyers only made online payments with big and trust-worthy e-retailers. Several authors also studied the online fashion business but none of them developed a model related to factors that might contribute to the consumers' online shopping experiences. Many Vietnamese researchers conducted research on e-commerce in Vietnam such as the research by Nguyen Xuan Thuy (2016), which addressed the application of e-commerce in leading economic zones of Vietnam, or Nguyen Duc Tai (2012), who looked into solutions to improve the state management of e-commerce in Vietnam.

Through the review of several literature on customer satisfaction and online shopping such as those of Besterfield, 1994; Barsky (1995), Kanji and Moura (2002); Fecikova, (2004) or Veloutsou et al. (2005) on different construct of customer satisfaction; discussions on the subject of satisfaction in the traditional retailing literature (Mason and Bearden, 1979; Oliver, 1980; Anderson et al., 1994; Terblanche and Boshoff, 2001a,b; Johan, 2006; Ofir and Simonson, 2007); the exploration of dimensions and determinations of satisfaction under e-commerce context (Heiner et al., 2004), six factors including technology, websites, products, marketing activities, delivery and payment have been identified to have potential influences on customer satisfaction in online fashion shopping.

Literature Review

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Nowadays, one of the most important issues concerning all businesses is consumer satisfaction. It is the principle of the continuous improvement in the modern enterprise to measure how well a company does to satisfy consumers demands. Another reason is consumer satisfaction should be measured and translated into some measurable parameter. As a result, the consumer satisfaction measurement may be used as the most reliable feedback. It provides client' preferences and experiences in an effective, direct, meaningful and objective way. Hence, it will lead to the consideration that consumer satisfaction is a baseline standard of performance as well as a possible standard of excellence for any business organization (Gerson, 1993).

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Research framework

Base on the literature review, six influential factors on the satisfaction of online consumers were pointed out to formalize the research framework and hypotheses as below:

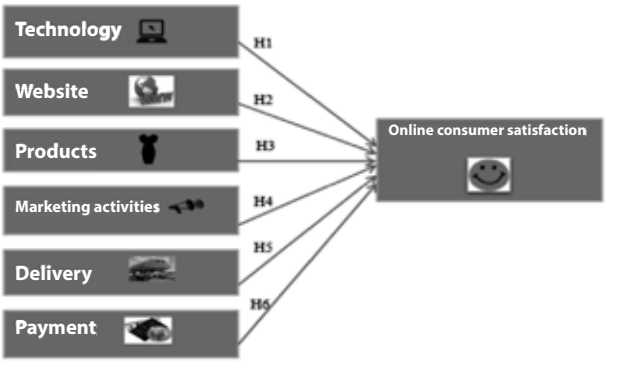


Figure 3: Internet users in Vietnam compared to the world's average

Six hypotheses were developed accordingly:

- H1- There is a significant relationship between technology and the satisfaction of online consumers in the fashion industry.

- H2- There is a significant relationship between the website and the satisfaction of online consumers in the fashion industry.

- H3- There is a significant relationship between the products and the satisfaction of online consumers in the fashion industry.

- H4- There is a significant relationship between marketing activities and the satisfaction of online consumers in the fashion industry.

- H5- There is a significant relationship between the delivery service and the satisfaction of online consumers in the fashion industry.

- H6- There is a significant relationship between payment and the satisfaction of online consumers in the fashion industry.

Research Methodology

The sample design should be well-planned to get the purposive sample of the total population to be focused on in the research. In this research, the authors applied Required Sample Size with the confidence of 99% and a margin error of 5% to calculate the minimum number of units of analysis who will be sent questionnaires as 663 people. The authors decided to send out 1000 questionnaires to these groups and expected a response rate of 60 – 70%.

For this research, a self-administered questionnaire will be applied to collect data in both online and offline forms. The data will be then automatically recorded for research purpose. The self-administered survey has been considered as the most suitable approach for a widespread research program (Malhotra, 1993; Zikmund, 2000). As being suggested by these authors, the self-administered questionnaire is able to provide respondents anonymity, confidentiality and the freedom to express their opinions (Bush and Hair, 1985; Davis, 2000). Besides, the self-administered questionnaire also helps to avoid inadequate records and support to generate uniform data from different respondents (Sutton, 2001).

The Statistical Package for Social Sciences (SPSS) program used for analyzing the data collected from the validly completed questionnaire through testing the research hypothesis (Julie Pallant, 2001). Besides, it should be noted that all the statistical and hypothesis tests shall also apply the significance level at 0.05 in this research project. The significant level of 0.05 will be applied to discover that hypotheses are rejected or supported, to evaluate the reliability as well as the validity of statistical data.

These following methods will be applied to address the research questions:

- Demographic factors: This analysis will provide a demographic description of respondents' profiles involved in the survey with descriptions and frequencies.

- One-way ANOVA, independent T-tests for analyzing the relationship between online consumer satisfaction with Technology, Website, Products, Marketing activities, Delivery, Payment by Respondents' characteristics.

- Correlation method of Pearson for quantitative analysis of the relationship between independent and dependent variables: Multiple linear regression analysis is used for testing the relationship between Technology, Website, Products, Marketing activities, Delivery, Payment, and Online consumer satisfaction.

Findings

Demographical characteristics

In order to perform a complete research for this study, there are 740 respondents from 1000 questionnaires sent, of which 488 were females and 252 were males. More than 500 responses have been recorded through an online platform. The remaining responses are collected through the distribution of paper questionnaires. The number of female respondents is doubled the number of male respondents with 65.9% and 34.1%, respectively.

Most respondents (532) age between 22 and 35 (71.9%), and 160 respondents are under 22 (21.6%). Only 6.5% of respondents are over 35 years old. This reflects exactly the scenario of e-commerce in the fashion industry, where the younger generation tends to buy more online fashion products than the elders do.

With regard to location, there are 450 respondents (60.8%) from the South of Vietnam. This is quite reasonable as many big cities in Vietnam are located in the South and the trade volume of this region is also very high.

Occupation also varies among respondents. Most of them are office staff (65.9%) and students (24.6%). Only 10% of respondents are self-employed.

The majority of respondents earns below 15 million VND per month (90.4%). Nearly 10% of respondents have higher monthly income.

All of the participants in this survey have purchased online fashion products at least once. Therefore, the data obtained is more likely to be practical and accurate.

Table 1: Multi Linear Regression Model of Online consumer satisfaction and other variables

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.646[a]	.417	.412	.767
a. Predictors: (Constant), Payment, Products, Technology, Delivery, Website, Marketing activities				
b. Dependent Variable: Online consumer satisfaction				

The model summary table suggested that 41.7% of online consumer satisfaction can be explained by 6 independent variables.

Table 2: Analysis of variance

ANOVA						
Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	191.885	6	31.981	111.113	.000[b]
	Residual	210.975	733	.288		
	Total	402.861	739			
a. Dependent Variable: Online consumer satisfaction						
b. Predictors: (Constant), Payment, Products, Technology, Delivery, Website, Marketing activities						

Table 3 shows that all the VIF values are less than 5, revealing that there is no problem in terms of multi-colinearity among the predictor variables. The tolerance level of the predictor variables is high enough to indicate strong relationships among the predictor variables. There are positively significant relationships between Technology, Website, Products, Marketing activities, Delivery, and Payment with regards to Online consumer satisfaction because the Sig. values are below 0.05.

Table 3: Coefficients

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.	Collinearity Statistics	
		B	Std. Error	Beta			Tolerance	VIF
1	(Constant)	-2.347E-17	.028		.000	1.000		
	Technology	.334	.028	.334	11.833	.000	.607	1.647
	Website	.216	.028	.216	7.667	.000	.596	1.678
	Products	.347	.028	.347	12.315	.000	.686	1.457
	Marketing activities	.106	.028	.106	3.759	.000	.506	1.978
	Delivery	.305	.028	.305	10.823	.000	.579	1.728
	Payment	.185	.028	.185	6.563	.000	.502	1.992
a. Dependent Variable: Online consumer satisfaction								

The regression equation:

Online consumer satisfaction = 0.334 (Technology) + 0.216 (Website) + 0.347 (Products) + 0.106 (Marketing activities) + 0.305 (Delivery) + 0.185 (Payment)

Interpretation:

- For every unit increase in Technology, Online consumer satisfaction will increase by 0.334 units, given that other variables remain constant.

- For every unit increase in Website, Online consumer satisfaction will increase by 0.216 units, given that other variables remain constant.

- For every unit increase in Products, Online consumer satisfaction will increase by 0.347 units, given that other variables remain constant.

- For every unit increase in Marketing activities, Online consumer satisfaction will increase by 0.106 units, given that other variables remain constant.

- For every unit increase in Delivery, Online consumer satisfaction will increase by 0.305 units provided, given that other variables remain constant.

- For every unit increase in Payment, Online consumer satisfaction will increase by 0.185 units provided, given that other variables remain constant.

In summary, the relationship between the 6 variables and Online consumer satisfaction has been identified. The finding indicates that all 6 independent variables are found to have a significant positive correlation with Online consumer satisfaction. Products (0.347) is the most influential variable affecting Online consumer satisfaction, with Technology (0.334) comes second. Delivery, Website and Marketing also moderately and positively influence Online consumer satisfaction.

This result implies that the e-retailer of online fashion products in Vietnam should put their efforts in Products and Technology in order to enhance the online consumer satisfaction.

Conclusions

Online consumers' perception and their decision-making processes when purchasing and using commodities and services are important because

they contribute to maintaining customers' loyalty and increasing the profitability of the business. Customers' loyalty is built on their satisfaction, which is the drive that makes consumers keep using as well as voluntarily advertising the products. Findings of this research can be practically applied to online traders and related businesses in fashion industries, associations, educational organizations and related governmental agencies. Apart from that, a business can adjust its activities in order to better satisfy online consumers and to support the development of fashion e-commerce in Vietnam. Authors of the research also come up with some recommendations that can lead to a more successful fashion e-commerce market in Vietnam.

First, students and office employees, who contributed a 90.5% of total respondents in the research, should be considered as the most important demographic for online apparels shopping in Vietnam. Typical demographic characteristics of this group include: age is from 35 and lower, monthly income is from USD 700 and below. These consumers prefer the "new" in products and services, and they also care more about the "price" of online goods, especially with promotions. The website is most positively perceived by students while marketing is the most positive interest of both students and staff employees. The business will be successful if these groups' needs are satisfied.

Second, the satisfaction of online consumers should be ensured from the beginning to the end when making an online purchase. The interest of consumers should be maintained from the start of the buying process and as they continue to find more suitable websites. At this step, marketing activities and Websites are the two main factors that should be carefully executed by online retailers. In the next step of the buying process, Technology and Products are also important determinants that lead targeted consumers to a purchasing decision after they search and compare different products on the website. Finally, belief and trust in the process of Delivery and Payment will be the final key factors to keep consumers stay with the e-commerce in general, and with a specific online trader in particular.

Limitation of Research

The author of this research sent 1000 questionnaires to 5 groups of consumers in Vietnam: students, office employees, workers, businesses and retired peoples. Of which, 740 responses were received for analysis and findings, with 90% of respondents are students and young office employees aged between below 35. It can be concluded that these groups are the major online consumers, and this study has reflected the situation of the fashion e-commerce in Vietnam currently. Nevertheless, retirees can also be important potential targeted consumers for e-commerce because there are 3 million retirees in the population (approximately accounting for 3% of total population) with fixed income. These people are normally afraid of moving out to buy goods at stores and can easily be better off when purchasing goods online. However, they are also very slow at technologies and tend to be reluctant to purchase products online if the purchasing process is too complicated. This group is also very skeptical, so online traders must be very strategic in showing their products to win their trusts.

On the other hand, mobile devices have been being used increasingly in Vietnam, as in many other countries. There were 130 million mobile phones in Vietnam at the end of 2014, and 20% of them are smartphones. Vietnam is among countries with the high rate of mobile devices using per person (1.45 mobiles/person). According to the Vietnam E-Commerce and Informatics Technology Agency (VECITA, 2014), 34% of the Vietnamese population use mobile phones to access the internet. Each Vietnamese spends on average 1 hour and 43 minutes per day on the internet using smartphones and tablets. Therefore, the mobile e-commerce will soon become a very important market segment in Vietnam. Yet, due to limited time, this

research did not touch the satisfaction of online consumers in the mobile e-commerce segment.

Recommendation for Future Studies

Addressing this research's limitations is recommended for further research, especially research on the satisfaction of customers of online fashion products in the mobile e-commerce segment. Furthermore, future research may look into the satisfaction of online retirees to provide an overview of this group so that online traders and academic researchers may refer to in their works.

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