Exploring Challenges in Apparel Customization: From the Perspective of Chinese Manufacturers

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Introduction

With the rapid development of the world economy and culture, personalized fashion products have received increasing attention from consumers (Zhan & He, 2012). The number of enterprises engaged in customization business is growing in recent years in China (Amed, Balchandani, Beltrami et al., 2018). Various apparel customization models exist in the Chinese fashion industry depending on how companies respond to consumer requirements. While consumer requirements are very important in the whole customization process, manufacturing constraints should also be in consideration in the custom product development process. Apparel customization is a complex process that involves collaboration of and coordination among various segments along the supply chain, including the integration of consumer input in the design process, production, and distribution (Kwon, Ha, & Kowal, 2017; Ulrich Pamela, Jo Anderson-Connell, & Wu, 2003). Transitioning from production-oriented approach to consumer demand-driven models represents a significant change in manufacturing and business practices, which can be very challenging for companies to go through.

Recognizing the trend of consumer demand for customized fashion products and having observed the various customization models in the Chinese fashion industry, this study aims to explore and identify the challenges encountered by custom fashion brands representing the major customization models in the Chinese fashion industry. Specifically, challenges encountered by the following three major types of fashion customization in the Chinese fashion industry were explored in this study: 1) Advanced Customization Models Based on Traditional Hand-Made Skills (ACTH), 2) Customization Models Based on Ready-to-Wear Business Extension (CRBE), and 3) Customization Models Based on Internet Information Technology (CIIT).

Methodology

Data for this study was collected via one-on-one online semi-structured interviews. A total of five interviewees were recruited for the interviews: two from ACTH, two from CRBE and one from CIIT. The five interviewees were in the roles of product director, co-founder, general manager, art director, and salesman (tailor) respectively in these companies, hence having a good knowledge of the customization

process of their respective company. There were three major components of each interview: (1) the customization process adopted by their company, (2) the main problems in the development of customized apparel products, and (3) measures to solve the identified problems. Each interview lasted about 40 minutes for a total of 213 minutes audio records. The audio was then transcribed into text. Following the grounded theory (LaRossa, 2005; Timmermans & Tavory, 2012), a software named Nvivo was used to conduct data analysis, including coding, data reduction, and theme identification (Nelson, 2020).

Results and Discussions

Three phases of coding per grounded theory were employed, including open coding, axial coding, and selective coding. As a result, ten core categories were generated which include 207 nodes. The interrelationships among different categories confirmed the following componentsof the customization process: customer acquisition, receipt of client's requirements, placing orders, body measurement capturing, pattern making, cutting, product assembly, sampling, and product delivery. However, varied process focuses were revealed among different customization models. For example, getting client's requirements and testing samples stayed the focus for ACTH, reflecting their attention to client's experience and customer relationship maintenance via extensive communication with customers. As to CRBE, customer acquisition and body measurements are vital to their business due to the strong support of the supply chain system. Customer acquisition, soliciting client's requirements and body measurement are among CIIT's priorities, accredited to their powerful Internet information technology. While priorities and problems varied among the different customization models, some common challenges were revealed.

First, being a parent node in the coding system, salesman/tailor was viewed as critical in the customization process. Concerns were revealed regarding the dependency on the salesman's ability, personality, experience, and communication skills to have an accurate capture of consumer needs and requirements. For CRBE and CIIT, professional training were utilized as an effective mechanism to improve and ensure the consistency of their salesmen's professional skills. However, for ACTH, simple training may not be of much help. The improvement of the salesman's overall quality and long-term cultural accumulation may work, but it takes a long time.

Secondly, it is difficult to provide customers with products that meet both personalized needs and fashion trends. Customized brands are often either limited by their typical styles or being too similar to other brands without their own uniqueness. Therefore, balancing uniqueness and fashion, or promoting both of them at the same time, is a big challenge.

The third challenge lies in customer acquisition in terms of high customer acquisition cost and full of alternative competing brands. With the gradual saturation of China's Internet information-flow market, brands need to pay higher prices to create brand exposure among consumers. At the same time, intensive competition in the Ready-to-Wear market drove more brands to enter niche markets, thus causing the customization market more crowded. All respondents had a consensus on the importance of retaining current customers and cultivating them into ambassadors for their brands.

Unexpectedly, two important factors to ensure the quality of custom clothing, clothing pattern and technology, were not viewed as challenging by any of the interviewees. For CRBE and CIIT, they can simulate a large number of different human body models in a short time using different computer algorithms. For ACTH, they have accumulated a large database of human body matrices during their hundreds of years of operation, hence can easily meet the needs of consumers with different body types. Besides, the fashion industry in China has accumulated great experience in producing apparel products over the past decades, hence bearing no challenges in terms of technology in apparel customization.

The results of this study revealed the bottle necks of apparel customization in the Chinese fashion industry, lending great implications to the development and future growth of this niche market. Future studies could employ quantitative approaches to systematically identify and investigate the challenges in apparel customization across the whole fashion industry.

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