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Analysis of the Decreasing Clothes Consumption in Japan – Some New Tendencies of Consumer Behavior on the Basis of Data of Psychology, Time-use and Expenditure

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I. Introduction

In Japan, the department stores have decreased their sales since 1991(Fig. 1). The sales of department stores are one of the important indexes of the business situation and the consumer spending. So, we are interested in their sales.

In the department stores, about 50 percent and more of the total sales are from clothes sales (Fig. 1), moreover their profits from clothes are about 60 percent and more. In this figure, further, you can see that the sales of clothes have decreased since 1991. These percents of decrease in 1999 reached 15 %.

This is the reason why the decreasing of the sales in department stores continues for long time.

Therefore, increasing the consumption on clothes is the interesting thing for every field of
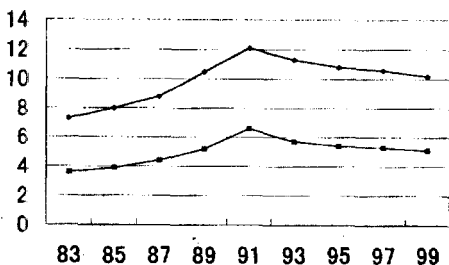
<Fig. 1> The Sales of Department Stores and of Their Clothes (billion you)
— depart., — clothes
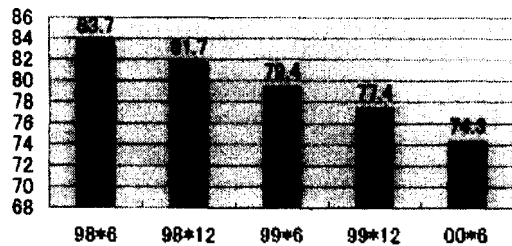
<Fig. 2> Sales of Fibers, Textiles and Clothes (% to 1995 sales)

business. The decrease of sales is not only in the clothes, but also in the total of fibers, textiles and clothes (Fig. 2).

Today I would like to provide a consideration about the decreasing clothes consumption in Japan. I will give you this talk in four viewpoints. The first part deals with economics. The second part concerns time use of household. The third part is from psychology, and fourth part relates to the interdisciplinary field between psychology and economics.

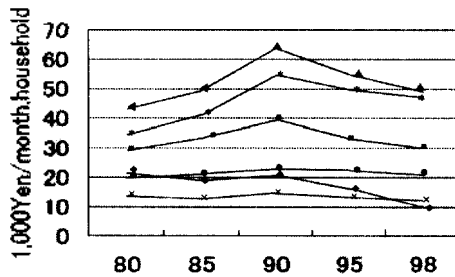## II. Expenditure of Consumers on Clothes (Economic Viewpoint)

Fig. 3 shows the decrease of the expenditure ratio on clothes in family finance. For 40 years, % of decrease is almost half. Fig. 4 shows the amount of expenditure on each clothes.

The reason of decreasing is as follows.

(1) Consumers feel that clothes are more ex-
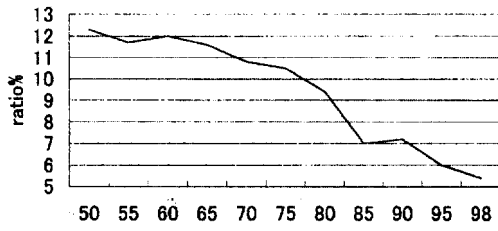
<Fig. 3> Expenditure Ratio % of Clothes in Total (/household)

<Fig. 4> Amount of Expenditure of Each Items of Clothes.

- ➤ : Japanese clothes   — : Children's clothes
- — : Men's clothes   — : Shirts sweaters
- — : Women's dress   — : Under wear

pensive than other consumption goods. This feeling is proved by following two data.

<Table 1> shows the prices of many kinds

<Table 1> Retail Price Index (Japan Tokyo = 100) 1995(Rate of exchange = 94 Yen/US$) For fall/winter use on every clothes

Country City	America New York	UK London	France Paris
onions	60	43	61
eggs	58	82	110
hamburger	61	52	90
perm fee	75	99	96
television	73	138	118
men's suits	53	61	62
skirt	44	83	59
dress shirt	79	62	63

<Table 2> Change of the Regular Price of Some Apparel Makers

(Yen/a clothing for women
Source : ASAHI 2000/8/26)

apparel maker	item	price(Yen)	ratio	
		1999 (a)	2000 (b)	(a-b)/ a%
A	sweater wool	4,900	1,900	61.2
	blouse cotton	4,900	1,900	61.2
	skirt	5,900	2,900	50.8
B	sweater wool	5,900	3,900	34
	blouse cotton	5,900	3,900	34
	skirt	6,900	6,900	0

of clothes in Japan are more expensive than other countries. Under expensive feeling of consumers, some retailers (UNIQLO, Shimamura) have suddenly expanded their business by low price sale since 1998.

In 2000, many apparel companies started to reduce the list price of their clothes.

Some examples of these changes of price in this year are shown in <Table 2>. Apparel company A reduced 50 to 60% of list prices on their goods.

<Table 3> A Survey on Buying Tendencies of the Recent Consumers
Source: NIKKEI(1995/6/29)

Question 1
You don't have any goods you want to buy.
Its answers: Yes 22.1% Nearly yes 28.7%
                  Nearly no 31.8% No 17.4%

Question 2
The reason why you don't have any goods you want to buy:
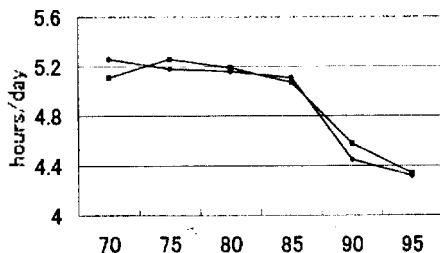Its answers:
① I have already bought almost all goods I needed. 33.5%
② What I want to buy is another items than any Goods. 28.6%
③ I hardly have the desire I possess some goods. 26.6%
④ There are no charming goods for me. 18.5%

(2) Consumers feel to be filled with almost all of the consumption goods. So, they tell us "there are no goods, which we want to buy". <Table 3> shows the survey of the reason for no goods, which consumers want to buy. This table tells us the consumers to have no goods they want to buy hold majority, because the total of Yes and Nearly yes is 50.8.

By this survey, we find many goods are already not attractive to consumers. Clothes may be the same situation as other goods.

III. Attitude Toward Housekeeping (Time Use Viewpoint)

Time use for housekeeping is decreasing for 25 years (Fig. 5).

<Fig. 5> Time Use of Adult Women for Housework.
← weekday, → Sunday

<Table 4> Influence of Job on Time Use of Housewife on Housework (the thirties, weekday, 1995)

	Hour: Minute	source: NHK B.C. Laboratory	
		jobless (a)	fulltime job(b)	ratio (b)/(a)
Total time of housework		jobless (a)	fulltime job(b)	ratio (b)/(a)
	cooking	8:44	3:45	0.43
	washing	2:38	1:32	0.58
	cleaning	1:27	0:45	0.52
	shopping	0:45	0:13	0.29
	child care	0:45	0:18	0.40
	small	2:23	0:43	0.30
	things	1:00	0:26	0.43

The first and main reason is increase of women with job. <Table 4> shows the job makes the difference of time use on housekeeping. Ratio of time use on washing of women with job to jobless is almost half.

The second reason is that women hate the labor of housekeeping. The second reason relates to psychological field.
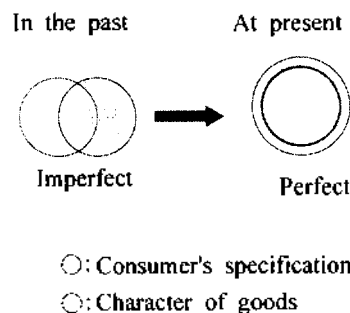
The consumers' actual state of using clothes is complicated and difficult. The first state is to choice it at buying, because they have to confirm the label for treatment. The second state is to select the method of maintenance: namely industrial cleaning or domestic washing. The third is to wash, finish and fold the clothes by themselves.

The results of survey suggest that any complicate dealing with clothes may be one of the reasons for decrease of clothes purchase.

IV. New Tendency in Choice of Goods on Buying (Psychological Viewpoint 1)

The recent consumers, particularly young women, don't buy the goods whose characters have even the slight discord with their requirement (Fig. 6). The degree that a character of goods matches the consumer's specification to

Match of consumer and goods on buying

In the past   At present

Imperfect   Perfect

○: Consumer's specification
○: Character of goods

<Fig. 6> Change of Consumer's Requirement to Goods.

goods becomes severer at present than in the past.

The recent consumers, therefore, don't tolerate any substitute. This tendency may introduce two results:
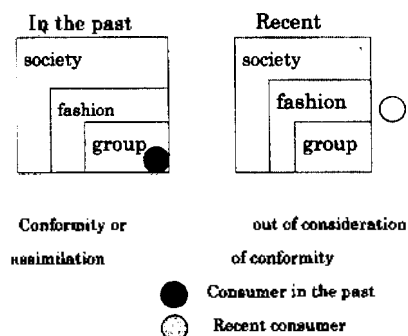
① The consumers may feel the difficulty in finding the goods he searches, so he will not probably obtain it.

② As there are many goods, which were not chosen by the recent consumers, unsold goods might increase. In the past, such goods might be almost sold.

V. Person Perception Depending on Clothes (Psychological Viewpoint 2)

Person perception that a person makes someone an impression is a psychological concept. Some one is called as object. In order to make his impression better, an object usually takes conformity to his groups into consideration (Fig. 7). However, the recent consumers don't care the assimilation or conformity to their societies or groups. A survey shows the conscious about above conformity in youth (Table 6). Generally speaking, the most efficient means of conformity are the use of clothes, especially fashion.

In the past, clothes are put on for forming the social interaction. Beside, the recent consumers

<Fig. 7> Person Perception (Interpersonal cognition) Whether Person Takes Society, Group and Fashion into Consideration or does not.
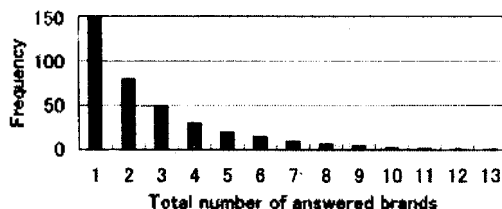
<Table 6> Rotio of Society-Oriented and Self -Oriented in Twenties (Which life do you choice for society or yourself?) Source : Life Design Lab.

	sosity-oriented	less society-	less self-oriented	self-oriented
Total	3.6	12.6	53.7	29.5
Men	3.8	11.3	52.9	31.7
Women	3.5	13.7	54.4	27.7

hardly take the assessment from their groups into consideration. This difference of behaviors between past and recent consumers is shown in the choice of cloths. The former selects the clothes to be conscious of the social assessment. But the latter is not conscious of their societies or groups in selecting the clothes.

We find one of the influences of the recent consumers' behavior on the intention to "brand", that is not being interested in the major brands but in theirs. Their brands are not broadly known. One of the results of our survey is shown in <Fig. 8>. Date of survey is October in 1998, and respondents are 184 of female students (19 to 22 years old). The respondents were requested to list the brand name they were interested in. The total number they listed was 375. The results were widely dispersed and the small brands 1 to 3 of respondents listed occupied 75%. Contrary, the famous brands, which 10 and more of respondents listed, were less than 10%.

This result tells us that the young consumers

<Fig. 8> Survey on Brand (Question: What brands are you interested in?)

hardly choice the major brands because they hate to assimilate to people, their societies and groups they belong to.

VI. Future of Goods, Specially Clothes (Interdisciplinary Viewpoint Between Economics and Psychology)

It is said that the expenditure in family has exchanged from goods to service. I tried to demonstrate it in <Fig. 9>. The tendency of the expenditure ratio was true. Service showed the constant growth.

However, if the tendency was represented by ratio of expenditure to 1980 (Fig. 10), this try went wrong. Y-axis of this Figure is percent to 1980 expenditure. As you can see in <Fig. 10>, the most growth is shown in durable goods. Though service shows the constant growth, its speed is less than durable goods. The reason of

relatively low growth in service expenditure should be considered about both durable goods and service.
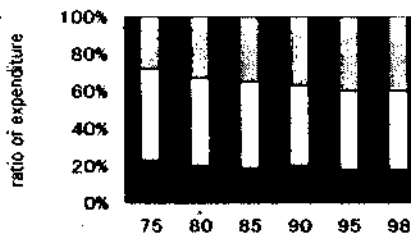
For this purpose, each item in durable goods and service expenditure should be severally considered. The items of service expenditure are shown in <Table 7>. These items are classified to three groups. It is shown in (Table 8).

Ratios of 1998 to 1980 expenditure on each item and average of each group are added to <Table 8>. From this result, Type 1 and 2 of ratio of expenditure in 98/80 are less than Type 3. Even Type 1 there is a high ratio of item: namely "attendance on senior", but this is a special case of new and growing field: such as care business.

The reason why Type 3 has the highest ratio is that recent consumers have the intention to like their own activity. Activity is something to
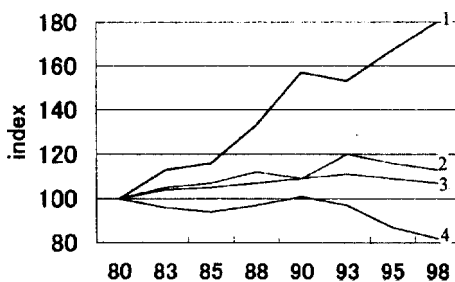

<Fig. 9> Change of Expenditure Ratio.

☐ service   ■ semi-durable
☐ non-durable   ■ durable

<Fig. 10> Index of Expenditure(1980=100).

1; — durable   3; — non-durable
2; — semi-durable   4; ⋯ service

<Table 7> Classification of Goods and Service

Goods
Durable refrigerator, washing machine, sideboard, car, spectacles
Semi-durable curtain, bowls & dishes, pans & kettle, clothes, golf goods, books, umbrella, bags
Non-durable onion, beef, egg, wine, hamburger, soap for washing, medicines, newspaper

Service
washing charge, postage, telephone charge, school fee, medical treatment, Hotel charge, package tour, lesson fee, permanent wave charge

<Table 8> Characteristics of Service Expen-Diture

Type 1 : Substitute for labor of housekeeping
(Example : washing 1.16, Permanent 0.96, attendance on senior 2.44, taxi 0.94 and eating out 1.50) Average:1.40

Type 2 : Dependance on labor of specialist
(Example: medical treatment 0.91, school fee 1.66 and lesson fees 1.35) Average : 1.30

Type 3: Assistance of consumer's activity
(Example : pack tours 2.01, sports 4.59 and admission fees 6.14) Average : 7.58

<Table 9> Influence of Income Class on Expenditure

(1) Amount of expenditure on clothes and shoes

Yen/month, household 1998

Class	I	II	III	IV	V	Average
Amount	10.8	14.3	17.6	21.8	30.9	19.1

(2) Ratio of class V/ I as index of consumer's choice

Amount of class V/ class I of expenditure

Order	1	2	3	4	5
Item	Education	Clothes & shoes	Culture & leisure	Transport communication	Furniture & household articles
Ratio	3.66	2.86	2.65	2.39	2.07

do by themselves: such as tennis, golf, travel and camping.

Next point of view is consumers' income. If consumers' income increases, they will show another behavior of expenditure. To know this behavior, we show <Table 9> (1) as income quintile groups. All households are divided by income to five classes. Class I is the poorest and class V is the richest.

The ratio of class V to class I is obtained in <Table 9(2)>. The consumers in class V pur

chase 2.86 times clothes than in class I. The clothes are the second order in all items. This result shows that clothes have the probability to increase their consumption with income.

As another peculiarity of clothes is shown in <Table 10>, however, price and quantity of clothes are not in hope of growing. In this table, some items are added for comparing them with clothes. As a result of <Table 10>, the most grown item is "wine" in quantity and "car" in price. These items are supported by consumers'

<Table 10> Peculiarity of Clothes as Goods

(1) Price		Real price*			Ratio
Item	unit	1980	1990	1998	98/80
Clothes for women	1000¥/1	405	352	267	0.66
Shoes for women	1000¥/1	10.7	11	10	0.93
Beef	¥/100g	405	352	267	0.66
Wine	¥/100ml	159	158	116	0.73
Refrigerator	1000¥/1	163	144	107	0.66
Car	10000¥/1	91.3	126.4	147.7	1.62
(2) Quantity		Purchased/month/household			Ratio
Item	unit	1980	1990	1998	98/80
Clothes for women	1000¥/1	16.5	12.5	9	0.54
Shoes for women	1000¥/1	1.4	1.8	1.5	1.07
Beef	¥/100g	91	108	106	1.16
Wine	¥/100ml	5.7	8.8	29.4	5.16
Refrigerator	1000¥/1	0.48	0.56	0.7	1.46
Car	10000¥/1	0.05	0.06	0.06	1.21

*real price:erviced by price index in stabdard year 1995

intention to their life. The intention includes their pursuit of comfort, amenity and activity by themselves.

VII. Conclusion

I would like to conclude with a few general remarks on clothes consumption.

First, consumers' time-use in daily life is rapidly shortened for the housekeeping.

Second, recent consumers have the rigid requirement to choice the goods.

Third, consumers don't care the conformity to their societies and groups.

Fourth. The peculiarity of clothes was pointed out. Surely, clothes are one of goods. AS stated above, some goods are still growing in high ratio: such as car, refrigerator and wine. These goods are in accord with consumers' intention. Further, clothes have another characteristics. Clothes are not only goods, but also something psychological. This point of view should be emphasized to consumers by our clothes researchers.

I have just finished my talk about analyzing the decreasing cloth consumption. But I guess you would have a question of how we should deal with the above-mentioned problems. To answer your question, I suggest the next tentative plan to you as appendix. The problem 1 is the difficulty in dealing clothes. About this first problem I suggest a tentative plan to the apparel industry. Problem was notated by (P) and suggestion was by (S). The example of tentative plan is noted by (e.g.).

< Problem 2~4 are shown as the same matter.>

In closing my talk, I wish to express my great appreciation once again to chairman and Costume Culture Association for the privilege and the opportunity of talking to you about clothes consumption. Thank you very much.

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