

Exploring Business Opportunities in Singapore for Japanese Apparel Companies

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Abstract—Japan has been closer relationship with Singapore among ASEAN nations politically, economically and culturally. Singapore possesses several of national competitive advantages, but a labor-intensive business like retailing does not seem suitable for the Singapore market. A variety of Japanese firms have launched their business in Singapore recently. This dissertation is to illustrate how Singapore market conditions of fashion apparel have been functioning and to explore the opportunities for Japanese companies to be successful in their business there. More concretely, the political and economic conditions of Singapore and the characteristics of each consumer segment are reviewed on the basis of its cultural backgrounds and consumer behavior. Comparisons with other countries are also adopted to look into business opportunities. Finally, the potential of businesses for Muslim consumers has been examined whether to become a future huge potential market.

Index Terms—Singapore, Japanese fashion apparel, multi-cultures, life style, consumer segmentation.

I. INTRODUCTION

Japan has been currently building closer relationship with the Association of South - East Asian Nations (ASEAN) and set positioning of one of important trading partners like China, the United States and Europe Union. In particular, Japan has been promoting strong economic links with Singapore among ASEAN nations. Starting with the agreement of the aeronautical authorities regarding air services on August of 1967, both countries have been supporting politically and economically with each other. With the viewpoint of trades and economic activities for Japanese corporations, Singapore is one of major invested countries; 757 Japanese companies are registered in the Japanese Association of Singapore and 832 Japanese companies are registered in the Japanese Chamber of Commerce in Singapore, both of which are located in Singapore.

In general, Singapore is said to possess the national competitive advantages of 1) the fully grown financial industry with an effective financial market, 2) the No.2 container handling capacity in the world next to Shanghai, 3) a 17% corporation income tax rate, which is much lower than Japan's 40%, 4) easy accesses to other ASEAN countries, 5) the feasibility of a hub of the ASEAN region to control those countries. A labor-intensive business like retailing and food business does not seem suitable for the Singapore market mainly due to higher labor and rent costs. However, a variety of labor-intensive industries have started business in

Singapore; fashion apparel shops, general merchandising stores and food eateries have started business there. Several of them, which meet the needs and wants of the Singapore market, are success in the business, but many of them have failed unfortunately.

This paper is intended to illustrate how Singapore market conditions of fashion apparel have been working and explore the opportunities for Japanese companies to be successful in their business. In addition, the potential of fashion businesses for Muslim consumers has been investigated as a future big submarket, even though mass media's interests tend to concentrate on the halal foods.

II. SINGAPORE AND SINGAPOREAN CONSUMER BEHAVIOR

A. Singapore

Republic of Singapore is located in the East-South part of Asia and a small country whose area almost same as Tokyo 23 wards only. The population is 5.58 million, of which size is less than half of Tokyo's. However, the economic power is much stronger. For example, its gross domestic product (GDP) per capita has reached US\$52,888, whereas that of Hong Kong is US\$42,390 and that of Japan is US\$32,486. Although Singapore has little natural resources and its market is too small to be independent domestically, it grew swiftly to join the ranks of the developed countries mainly because the government at that time promoted the national development based on the induction of foreign capital into the country.

The Singapore stands for one of the most competitive and dynamic economies in the world. For the past decade, Singapore has been the only Asian country to receive top-tier AAA sovereign ratings from all major credit rating agencies, including Standard & Poor's, Moody's, and Fitch. Globally, it is one of only nine countries with an AAA rating from the Big Three credit rating firms. Singapore attracts a large amount of foreign investments as a result of its location, skilled workforce, low tax rates, advanced infrastructure and a low corruption rate. There are approximately 10,000 overseas companies from the U.S, Japan, Europe, China and India in Singapore. Twenty free-trade agreements have been signed with other countries.

B. Singapore's Diverse Melting Pot of Cultures and Races

Each ethnic group comprises 74.1% as Chinese, 13.4% as Malay, 9.2% as Indian and 3.3% as others like Eurasian and Peranakan in Singapore. Traits of main races are described as below.

1) Chinese

The Chinese are the largest ethnic group in Singapore, making up almost three-quarters of the country's population. The Chinese culture features prominently in Singapore. Most of them immigrated here from the southern provinces of

China. People from the Hokkien and Teochew dialect groups are the most populous, followed by members of the Cantonese, Hainanese. Many immigrants were to escape severe conditions in the mainland China and others aimed at making money in Singapore. In fact, a lot of successful entrepreneurs were Chinese descents. Today, Singaporean Chinese are well represented across different segments of society – from politics and business to sports and entertainment circles.

2) Malays

The Malays are original settlers, who came from such neighborhoods as Indonesian islands and Malaysian peninsula, to Singapore and the second largest ethnic group there. Their culture strongly influenced other ethnic groups. The Malay language spoken by the locals here is closer to the version spoken in Peninsular Malaysia than Indonesia.

3) Indian

The Indians are the third largest ethnic group, and their community is one of the largest overseas Indian populations. Most of them are from the Southern part of India, immigrating after early nineteenth century. Today, more than 50 % are Tamil ancestry and Hindus. Since they are one of strongly business-oriented ethnic groups, many Indians start businesses as entrepreneurs, dealing with a wide variety of goods and services.

C. Traditional and Modern Values of Singaporean Cultures and Life Styles

Table I shows what kind of values each country primarily possesses by segmenting values into 5 clusters. The value of Singaporean belongs to Cluster B, in which there are many Asia counties except Japan, and which indication of “emphasis on relationship with family and society.” In general, Chinese people highly regard human relationship both in work and in private. When the author worked in Singapore, every Singaporean colleague daylily went for lunch together with his/her colleague and ate dinner with his/her family members. Especially, they are said to think more of family, kindred and friends in order. Once a trust between a Chinese and even a Japanese is built, the Chinese become a strong supporter.

TABLE I: CULTURAL VALUES OF COUNTRIES [1]

Cluster	Name of Countries	Traits
A	Denmark, Finland, Holland, Norway, Sweden	Individualism, self-fulfilment, Paternalism
B	Hong Kong, India, Indonesia, Jamaica, Malaysia, Philippine, Singapore	Strong consciousness to attribute to family & society
C	Chili, Columbia, Ecuador, Pakistan, Panama, Bergin, Portugal, South Korea, Taiwan, Thailand	Tendency to avoid uncertainty, Immature individualism
D	Australia, Austria, Canada, Germany, U.K., Ireland, Italy, South Africa, Swiss, U.S.	Strong societal norms, Sophisticated self-fulfilment, Cooperativeness
E	Argentine, Belgium, Brazil, France, Greek, Japan, Mexico, Spain, Turkey	Emphasis on societal norms

The research of METI [2] categorizes each national people into 8 groups and estimates each share of a population (Table II). According to the research, the most majority group is “Opportunism,” whose income is relatively lower and whose main policy is “If you cannot beat them, join them.” They have tendency to follow short-term fads. For example, Singaporean are fond of going to a newly opened shopping

centers and restaurants, which have strong presence through promotions before opening. However, they are apt to lose interest right away. The second largest segment of Singapore is “Resignator,” who are not interested in spending money in life and like subcultural hobbies like cartoon. One of the biggest cultural differences between Singaporean and Japanese is the degree of uncertainty avoidance [3]. People in Singapore do not care much about uncertainty whereas Japanese have strong tendency to avoid uncertainty.

TABLE II: JAPANESE AND SINGAPOREAN VALUES AND LIFE STYLES [4]

Segment	Image/Description	Japan	Singapore
Opportunism	Relatively lower income, Preference for stable life, "If you cannot beat them, join them." Not keen to fashion but followers of new fads	19.7%	36.3%
Innovator	Polarized family income, Active in any value, Eager to lead people & organization, Keen to fashion	4.2%	5.9%
Hobbyist	Relatively higher income, Selfish & aggressive, Active in hobby, culture, art, fashion & food	9.6%	5.9%
Familyist	Average income, "live-and-let-live," More than 20% of total population in Japan	22.3%	11.8%
Yuppie	Relatively higher income, Outgoing & risk-taking, Uninterested in fashion, Keen to politics, job, self-development & social position	6.4%	7.4%
Resignator	Lower income, Prefer conservative life, Less comradeship, Subcultural life, Inactive in consumption	8.3%	18.1%
Average Habitant	Relatively higher income, Majority in Japan (15%), Eager to expose to mass media	15.0%	12.3%
Follower	Relatively lower income, Introverted, Interested in various hobby but not in politics & fame, "Gal" in Japan	14.6%	2.5%

TABLE III: COMPARISON BETWEEN JAPANESE AND SINGAPOREAN FASHION MODES

Mode in Japan	Key Words	Examples in Japan				In Singapore?
		Ages	Occupations	Areas	Icons	
Import Mode	High-end fashion for adults with trends from Paris & Milan Collections	25-50	Buyer, Press	Aoyama, Ginza, Roppongi	Sara Jessica Parker	○
Moderate Mode	Mode Fashion for Middle People	27-34	Fashion Ads.	Ginza, Aoyama, Daikanyama	Yasuko Matsuyuki	○
Elegant Madam	High Sensed Elegant Style Fashion Focusing on Social Gathering	40-50	Household Wife	Ginza, Aoyama	Towako Kimijima	×
Rich Career	Sophisticated Career Fashion for Higher Positions & Office Workers	35-	Specialist, Manager	Ginza, Marunouchi, Aoyama	Ayako Kamijima	○
Working Girl	High Sensed Career Fashion for Office Worker	25-35	Office Lady	Ginza, Roppongi, Shinjuku	Moe Oshkiri	○
Young Elegance	Young & Elegant Style Fashion with Boy Friend's Preference	18-25	College or University Student, Office Lady	Shibuya, Shinjuku, Marunouchi	Yuri Ebihara	×
Celebrity Casual	High Sensed Casual Style Fashion Copied to Celebrity but Emphasized on Her Own Sense	27-35	Office Lady	Aoyama, Ebisu, Roppongi	Rinka	○
Girly Casual	Pretty & Girly Casual Style Fashion	14-25	High School Student, College Student	Shibuya, Shimokitazawa, Kouenji	Haruka Ayase	×
Street Casual	Personality-emphasized Street Casual Fashion	18-25	Hair Dresser, Shop Clerk, College Student	Harajuku, Daikanyama, Kichijouji	Becky	○
Teens Casual	Jovial & Cute Casual Fashion	13-18	High School Student	Shibuya, Suburban Cities	Akina Minami	○
Gal	Sexy Casual Originated from Shibuya Street Casual Fashion	16-22	Shop Clerk, High School Student	Shibuya, Suburban Cities	Yukina Kinoshita	×

Table III indicates what kinds of the fashion mode are in Japanese fashion market and whether those modes exist in Singapore or not. I recently noticed that Singapore ladies have become more and more fashionable remarkably than a few years ago. When first coming there in 00's, I rarely came across young females, who wore European or American brands clothing. These days, I can find out a lot of fashionable ladies with popular brands along the Orchard Road, the most commercialized street in Singapore. Among

eleven segments, six modes can be seen in Singapore. On the other hand, none of Elegant Madam, Young Elegance, Girly Casual or Gal exists there.

To well understand this structure, the above four segments are simplified to re-categorize into two: the Madam segment and the Young segment. Then it can be inferred that those Madam are arousing the consumption of fashion because women’s social progress has advanced in Singapore. The biggest difference of fashion markets between Japan and Singapore is a volume of fashion consumption of young ladies. In Japan, female teenagers have been putting on overseas brands but, by contrast, not Singapore young ladies, who must take several rigorous exams that determine their academic and career paths when they are early teen ages. The strict educational system of Singapore has a great influence on their fashion consumption.

III. A FASHION BUSINESS IN SINGAPORE

Singapore has several weaknesses in administrating fashion business mainly due to its geographical features; 1) the small population; 2) the tropical rainforest climate with no distinctive season; 3) fragile demands for fashion apparels by national people. Although its total spending of fashion per capita accounts for US\$492, which is much higher than that of each other Asia country except Japan’s shown in Table V, its total market size is extremely small. However, Singapore is worth launching fashion business for two reasons. First of all, the government has been strategically endeavoring to expand its consumer market. Second, Singapore is able to become a platform for international exposures to other countries in the Southeast Asia.

Singapore announced to target 1,700 million visitors from all over the world in 2015 as a governmental movement “Tourism 2015.” At the same time, the country has tried to activate shopping by tourists with the event of “The Great Singapore Sale,” which is organized annually by the Singapore Retailers Association and co-organized by stores and malls to promote the tourism industry in Singapore. In addition, Singapore’s tax rates are one of the lowest among developed countries: the corporate tax rate is 17%, compared to Japan’s 40%. The country also provides preferential treatment to capital gains, dividends and remittances to branches are exempted from taxes. As such, the Singapore government is making an effort to attracting foreign companies and their funds there

TABLE IV: INTERNATIONAL VISITOR ARRIVALS STATISTICS [5]

Year	Consumption in		Population	Consumption in
	Fashion per capita	Fashion per capita	Unit: 10K	Fashion Unit:
Americans	616,400	641,465	635,283	657,296
Asia	11,077,447	12,006,069	11,568,372	11,684,701
Europe	1,537,334	1,591,194	1,617,241	1,635,725
Oceania	1,189,147	1,261,128	1,207,896	1,186,270
Africa	67,994	66,634	66,070	67,453
Others	7,769	1,433	290	24
Total	14,496,091	15,567,923	15,095,152	15,231,469
Japan	8,358,105	10,363,904	13,413,467	19,737,409

Singapore strategically facilitates foreign companies to set up a regional head office, which controls the group company’s decision or coordination of project policy in 2 or more countries, aiming at sustainable expansion of domestic demands, as is often the case with fashion businesses.

In general, it is common for a company to diversify Portfolio investment in expanding its business overseas. There are four criteria to make portfolio investment: 1)

potential of country’s economic development; 2) self-competitiveness in an invested country; 3) synergy effects or economies of scale in launching; 4) risk hedges of business itself, political issues and exchange rates. In fact, Zara, a Spanish clothing and accessories retailer first opened its store in Singapore in 2002 and then Malaysia in 2003 followed by Indonesia and Philippine in 2005 and China in 2006. Forever 21 also first opened its store in Singapore in 2004, Indonesia and Malaysia in 2007, Thailand in 2008, Japan in 2009 and Philippine in 2010. A firm, which starts overseas business, can fully utilize the advantages of Singapore.

TABLE V: CONSUMPTION IN FASHION PER CAPITA AND MARKET SIZES [6]

Numbers Countries	Consumption in Fashion per capita	Population Unit: 10K	Consumption in Fashion Unit: million
India	US\$26.60	121,057	US\$32,206
Vietnam	US\$23.24	9,250	US\$2,150
China	US\$89.48	132,860	US\$118,883
Indonesia	US\$50.30	24,900	US\$12,525
Thailand	US\$190.17	6,593	US\$12,538
Philippine	US\$30.56	9,234	US\$2,822
Malaysia	US\$89.05	2,995	US\$2,667
Singapore	US\$492.42	554	US\$2,728
Japan	US\$688.21	12,692	US\$87,347

IV. COMPARISON WITH “COMPETITOR,” HONG KONG

Hong Kong and Singapore are frequently compared because their historical backgrounds and economic scales are similar with each other. However, there are mainly three differences regarding retail business between them. First of all, Hong Kong belongs to a subtropical climate, whose average lowest temperature is below 15 degrees Celsius, while Singapore has a tropical rainforest climate with its average highest temperature is above 30 degrees Celsius. In relation to fashion business, seasonal changes of clothing occur in Hong Kong, but not necessarily in Singapore. Second, Hong Kong adjoins the Mainland China, whose middle class is 230 million people in 2014, going to 740 million people in 2020 [7]. This means an enormous amount of growth in purchasing power. Finally, consumers in Singapore have to pay Goods and services Tax of 7%, but in Hong Kong, only luxury goods are subject to taxation. Thus, Hong Kong is named as a “shopping heaven.”

TABLE VI: COMPARISON BETWEEN SINGAPORE AND HONG KONG [8]

	Singapore	Hong Kong
Area	716km ²	1,103km ²
Population	554 million	731 million
Main Industry	Financial Services, Manufacturing, Commercial	Financial Services, Real Estates, Sightseeing
GDP (2014 nominal)	US\$307.9 billion	US\$243.6 billion
GDP per capita (2014)	US\$56,284	US\$36,765
Trading	Import (2014)	US\$366.0 billion
	Export (2014)	US\$409.5 billion

V. JAPANESE APPARELS IN SINGAPORE

A. Fashion History and Consumer Consciousness

Major Japanese apparel companies like World [9], Renown [10] and Itokin [11] fell out the Singapore market recently, and Uniqulo started operation in 2009 as well as Onward Kashiyama [12] in 2010 there. The direction of

progress Japanese apparel firms may be better to take will be discussed in this chapter.

First of all, I would like to cite an example of fashion magazines in Singapore. Representative examples are ELLE, Harper's BAZAAR, Cleo and VOGUE, all of which fashion stylings belong to "Import Mode" or "Celebrity Casual" in Table III. Those magazines adopt Westerner fashion models such as Jessica Marie Alba and Beyoncé Giselle Knowles. On the other hand, Japanese fashion magazines like JJ, CanCam, ViVi, 25ans and Oggi use mainly Japanese models. This indicates the difference of each positioning and advancement regarding fashion of both countries. In Singapore, one of representatives of fashion is pret-a-porte, which is an "aspiration" for Singapore people. Fashion in Japan closely relates to people's everyday life. It can be inferred that fashion and daily clothing is not the same in Singapore until recently.

Hong Kong fashion brands like Giordano, Bossini and G2000 have started opening shops in Singapore since 80's, whose clothing were established as fashionable daily wears. Consequently, such fast fashion brands [13] as ZARA and Forever21 have created apparel demands in Singapore and have begun to accelerate the size of the total market expands rapidly. It is common for a national fashion industry to expand its market. However, the process of the fashion expansion in Japan is unique. The Japanese post-war economic miracle, which was Japan's record period of economic growth between post-World War II era to the end of Cold War, made Japan rapidly became the world's second largest economy by the 1960s. At the same time, many of the people self-identified to be members of the middle class, further developing and sophisticating their consumptions. Teenagers afforded to purchase high-end brands like Louis Vuitton and Gucci since 70's. The Veblen phenomenon [14] prevailed in Japan and approximately 90% of Japanese people have regarded themselves as the middle class since then (Table VII).

TABLE VII: SOCIAL STRATIFICATION OF JAPAN [15]

Stratification	1954	1959	1964	1969	1979	1989	1999	2009	2014
Upper	2.1%	0.3%	0.5%	0.6%	0.6%	0.5%	0.8%	1.2%	1.2%
Middle	Upper	6.4%	3.3%	6.6%	7.0%	8.5%	6.7%	9.3%	12.4%
	Middle	26.5%	37.0%	50.2%	57.6%	60.6%	52.1%	56.2%	56.6%
	Lower	22.5%	33.0%	30.3%	24.7%	22.2%	28.5%	24.6%	25.2%
Lower	37.7%	17.0%	8.5%	6.5%	4.8%	8.8%	6.4%	6.3%	4.6%
Total Middle	55.4%	73.3%	87.1%	89.3%	91.3%	87.3%	90.1%	90.2%	93.1%

Since United Kingdom, which has had the strict five social classes, colonized Singapore during 1824-1941 and 1945-1965, it is no doubt that the stratum had strongly influences on Singapore society. Many Japanese retailers confess Singapore fashion market is quite unique and too tough to earn sufficient sales or profits. Rather, I dare to say Japan is greatly unique in reflection of its cultural background.

B. Marketing Mix of Japanese Apparel Products

I make an observation on a Marketing mix of Japanese apparel products, which mostly give a favorable impression on Singaporean. The images toward Japanese products are "good quality (82.0%)," "reliable (80.0%)," "skillful (74.0%)," "well designed," by Singapore people [16]. Mr.

Ken Yamanaka, a fashion business consultant stated that Japan possesses stylish and fashionable images among other Asian people. The reason why Japanese apparel products are struggling in marketing in Asia is straightforwardly related to the selling prices. The survey, as described above, also demonstrated 66% as Japanese clothing seems expensive. For instance, supposed a T-shirt priced at 7,800 yen selling in Japan is exported to and sold in Singapore at a rate of 80 yen per Singapore dollar, the price is S\$104.33 inclusive to GST, which is a similar price to European brand's T-shirt. Even though the quality of Japanese clothing is much better overall, a quality and aspiration cannot compare on a level playing field.

Unfortunately, Japanese good "quality" clothing is defeated by an aspiration toward European fashion. Traditionally, Japanese manufacturer's pricing strategy is a cost-plus pricing, in which the selling price is determined by adding a specific dollar amount markup to a product's unit cost, resulting in not necessarily reflected consumer's value toward a product. The reason why Uniqlo is popular among Singaporean is the prices are based on consumers' perception to the values. The lesson learned from Uniqlo is that retailers need develop products with additional values for consumers, for example, by SPA [17], licensed sales systems, online network systems and creation of a secondary line for South East Asia markets.

C. Potential of Halal Fashion

Recently articles regarding an Islamic target market have been often seen in mass media. The total population of Islamic people all over the world totals 1.6 billion and the population will exceed that of Christian in a few decades. Islamic females must cover all body with clothing except hands and a face. In addition, Islamic clothes do not emphasize body lines base on, the Moslem faith. The traditional female clothing is a Baju Kurung and a lady covers her head with a Hijab. Uniqlo has just started selling Islamic clothing for Moslem females since January of 2016. Zalia [18] has also been aggressively selling Islamic fashion items on line. This market is huge and will soon have big impact on fashion industry all over the world.

VI. CONCLUSION

Typical Singaporean have tendency to "fall in and out of love quickly," are price-sensitive and are still under development of their fashion senses. In addition, Singapore is a tropical rainforest climate with no distinctive season and its market size is quite small. However, the country is equipped with efficient economic systems with well-developed infrastructures through effective national strategies. The recommendation to launch fashion business in Singapore is; 1) to prepare deliberate pricing policies, which offer added values to consumers; 2) to market casual clothing with moderate prices rather than formal or high-end one due to its climate and the perception of Singaporean toward fashion; 3) to target the promising Islamic market in Southeast area; 4) to utilize a portfolio strategy involving neighborhood countries like Malaysia and Indonesia; 5) to emphasize on branding with continuous communication strategies, which last for a long term.

In particular, it is important to note that long-term plans are essential for survival and growth, and that means commitments from senior management to long-term planning. The resources and energy they allocate to the process are a function of the target market, organizational culture, product life cycles, the particular marketing environment and the commitment from senior management.

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