

MEASURING MARKET MATURITY FROM A
BRANDING PERSPECTIVE IN THE
MALAYSIAN MODEST FASHION SECTOR

Ahmad Kamal bin Abdollah

Research Project Submitted in Partial Fulfilment of the Requirements for the Degree
of Master of Business Administration

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DECLARATION

I hereby declare that the case study is based on my original work except for quotations and citations that have been duly acknowledged. I also declare it has not been previously or concurrently submitted for any other degree at Universiti Tun Abdul Razak (UNIRAZAK) or other institution.

Signature:

Name: Ahmad Kamal bin Abdollah

Date:



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ABSTRACT

Abstract of the project paper submitted to the Senate of Universiti Tun Abdul Razak in partial fulfilment of the requirements for the Master of Business Administration.

Measuring Market Maturity from a Branding Perspective in the Malaysian Modest Fashion Sector

By

Ahmad Kamal bin Abdollah

October 2022

This study seeks to determine the level of development or maturity of the Malaysian modest fashion market by utilizing Mary Goodyear's spectrum of consumerization. This is done through comparing the correlation of each stage of the spectrum to the level of brand loyalty in the market. Brand custodians need to have better means of gauging whether a brand strategy would be relevant to the market. Goodyear posits that certain markets may not be ready or mature enough to accept certain strategies that are developed for much more advanced markets.

This study utilises an online survey methodology to compare responses on a Likert scale for the various stages on the spectrum of consumerization to the responses measuring Brand Loyalty. A total of 73 filtered useable responses were collected.

The study showed strong correlations between the first three stages of branding and brand loyalty, indicating that the market is at stage 3 – “Brand as Icon”. The implication is that brand custodians can spend more resources to develop brands that are iconic as the market is now more receptive towards such an approach. It also implies that any new brands must be able to fulfill the first two stages i.e., have clear brand identities and brand personalities.

CHAPTER 1 INTRODUCTION

1.1. Study Background

This is a research proposal for a study to be carried out for the final semester of the Unirazak Master of Business Administration (A11181) course taking place from mid-July to mid-October 2022. The study and its subsequent dissertation report forms part of the requirement for graduation for the course.

1.1. Problem Statement

The Search for Guidance in Malaysian Branding

Paul Temporal, stated in his book Branding in Asia (2000) that seven market trends push for the case for strong Asian (and, by extension, Malaysian) brands. The trends he listed are as follows:

- i. Breakdown of market boundaries,
- ii. Globalisation and global brands,
- iii. Increasing market fragmentation,
- iv. Product diversity and shorter life cycles,
- v. Greater market sophistication,
- vi. Digitalisation, and
- vii. Market volatility. (Temporal, 2000)

While the book was written decades ago, prior to the smartphone and social media revolution, the trends continue unabated and in fact intensified. Product life cycles for items previously thought to be more sustainable now last barely a year.

Outside of multinational or global brands, it is very difficult for brand managers and marketers in Malaysia to take a strategic view of their brand management when there

is so little in the way of references that can be made. Very often, brand strategies in the country can be seen as just an extension of tactical considerations. For example, many entrepreneurs utilise celebrity endorsement strategies without paying much thought to product design and differentiation. Thus, the success of their brand relies more on the choice of brand ambassador than the values of their product's brand. To take on a more strategic approach, businesses resort to consultants cum brand gurus such as Temporal.

Such simplistic approaches to branding cannot be blamed on the brand custodians alone. Without strong references, how do they know what strategies to adopt and what metrics to use without going to one of the aforementioned branding gurus? They would always revert back to what they know and build their strategies out of tactical considerations, or alternatively derive their brand strategies from their operational strategies. There is presently no way to properly gauge the market across a universal standard aside from social media engagement metrics, one of the reasons it is such a popular marketing platform. There is also no way to assess if a strategy is suited to the market.

What would such a metric look like? Metrics for some components of brand management already exist in the market. Interbrand's brand valuation methodology establishes one of the most well-known branding yardsticks with their annual list of Best Global Brands (Interbrand, 2021). Their methodology incorporates multiple factors that establishes the value of a global brand (they only measure brands that have at least 30% of their revenue from outside their home region). Global brands can use the list and Interbrands' brand valuation metric for comparison to see their own brand's competitiveness. A question that arises from this however is if enough of Malaysian businesses would find these macroscopic metrics useful.

The Modest Fashion Industry as a Branding Battleground

The context for this study is the modest fashion industry in Malaysia, which has become an exciting frontier of innovation in Malaysian business. It has several uniquely modern characteristics compared to other growing retail businesses in Malaysia. Just like other fashion segments in the country it is driven by a young demographic of Millennials and Gen-Z and a significantly higher proportion of female pioneers (Leong, 2021).

With the increasing use of eCommerce to drive sales and extend the reach of their marketing, the speed of growth of the players within this segment is staggering and they have had to mature quickly to meet an increasing need to differentiate. This trend is replicated globally where the market for modest wear is expected to hit USD402 billion by 2024. In Malaysia, the rise is greatly contributed by the early growth of e-Commerce from a market size of RM1.8 bil in 2010 to RM5 billion in 2014. According to Statista, eCommerce retail revenue in Malaysia in 2021 is USD6.3 billion (roughly RM27 billion) with fashion as the largest segment at 31% (RM8.4 billion).



Source: Solidiance Research & Analysis, Total E-commerce Market: Emarketer 2016 and Solidiance Estimates. E-commerce Retail Market: Statista Internet Retailing Database 2016

Figure 1 E-Commerce Retail market projections by YCP Solidiance, which since been exceeded. (YCP Solidiance, 2017)

The e-Commerce growth for this sector has been matched by the growth in retail outlets with boutiques springing up en-masse in Malay enclaves in the Klang Valley such as Shah Alam and Bandar Baru Bangi. In one stretch of road in central Bandar Baru Bangi, there is an estimated 40 to 50 modest wear brands the majority of which offer similar products with similar product positioning. A cursory walk through central Bandar Baru Bangi highlights just how intense the competition is and how important it is for brands to stand out from the crowd.

One such outcome of the need for improved branding is the rise of the celebrity entrepreneur who become their product's own brand ambassador. This includes household names such as Vivy Yusof, Nealofa and Jovian Mandagie among others, who use a combination of social media presence and market-driven positioning strategy to bring about a devout group of loyal consumers. Their social media presence is not without its drawbacks as the increased profile also brings about unwanted attention on any controversial statements the brand owners may make in their personal capacity e.g., coverage of the alleged insensitive comments by Vivy Yusof regarding Malaysian Government's remedial incentives for the poor (B40) during the pandemic.¹ This raises the question on whether or not these type of brand custodians in this industry segment understands the impact of their own actions on their brands or if perhaps they do not care.

As a result of the success of celebrity-owned brands, many of the most popular modest wear brands revolve around these personalities and not around brand values. Compare this for example to the sports apparel industry where brands not only use ambassadors, but also tie their brands to specific values. For example, Nike as a sports apparel brand associates itself with winning (Nike is the Greek goddess of

¹ "When Actions Don't Speak Louder Than Words", The Malaysian Reserve, Apr 2020.

victory) and taking the initiative (“Just Do It”). In contrast Adidas adopts a strong focus on tradition with the iconic three-stripe design on their apparel, denoting that the product is from that brand without the consumer even needing to see the logo.

There has recently been a few examples of more evolved brands that exploit certain brand values that are locked into the mind of consumers. One such example is Siti Khadijah (also known as SK), which focuses on a very specific niche in the modest wear category i.e., prayer attire. Compare this brand to other popular brands that revolve around the celebrity status of their founder, both those that are named after the found e.g., Fareeda & Naelofar, and those that are named differently e.g., Duck Scarves and Bawal Exclusive. SK has been successful enough to begin opening boutiques regionally, starting with Indonesia.



Figure 2 Siti Khadijah boutique selling women's Muslim prayer attire in Pekanbaru, Indonesia.

It could be argued that the level of competition has pushed SK to find a focused niche that they can deliver on. However, SK's smart niche strategy and value-centric branding approach seemingly remains the exception rather than the rule when it comes to modest wear. It is difficult to find other examples of niche strategies or similarly product-driven approaches to marketing.

An Opportunity to Study Brand Development in Malaysia

It is possible that despite the rapid pace of growth and the intense competition, the Malaysian modest fashion industry is still at a lower level of evolution with very few brands reaching the iconic status that reinforces brand loyalty, and fewer still that understands the role the brands play within society itself and how that can contribute to the brand's durability. There can be multiple factors to this, as it may simply be the case that the industry has just not matured enough to allow brand owners to take a more sophisticated approach to brand management.

There is now an opportunity to use the relatively young yet rapidly evolving modest fashion sector to explore the development of branding in Malaysia. Such a study can uncover guiding metrics on which future brand custodians can base their work. The study needs to show the level of sophistication or maturity in the market in Malaysia and what it means to marketers, brand custodians and managers.

1.2. Research Objectives & Questions

The objective of this research is to guide future brand management efforts, particularly brand building, in Malaysia's competitive landscape for modest fashion. The outcome of this study should show the level of maturity of the market relative to the brand loyalty of its consumers. It will then suggest what impact this has on management decision-making with regards to improving brand equity.

The main questions this research seeks to answer are as follows:

- What is the level of maturity of the Malaysian modest fashion market?
- How should this impact future decision-making in brand management within the modest fashion market sector?

CHAPTER 2 LITERATURE REVIEW

2.1. A Theory of Market Maturity in the Context of Branding: Mary Goodyear's Continuum of Consumerisation

How the Continuum of Consumerisation Was Proposed

The book *Brand Management: Research, Theory and Practice* (Heding, Knudsen, & Bjerre, 2009) lists seven approaches to brand management. However, none of the approaches listed dealt much with the maturity of markets in the context of brands. A brief passage however covers Mary Goodyear's theory of brand evolution that shows the suitability of measuring the maturity of markets. This is because the theory proposes that a brand evolves in response to the maturing of the market within which the brand is based.

The paper in question is an article published in the *International Journal of Market Research* titled "Divided by a Common Language" authored by Mary Goodyear (1996). In the article, Goodyear covers the confusion over the language of marketing and branding across different countries and cultures. Even the term 'brand' itself can be defined in so many ways. She then notes that, as an extension, the ways brands are managed are also very diverse and predictions made from models derived in one market may be contradicted in another. Based on her long experience in marketing, she believes that rather than these contradictions being based on variable cultural differences across the various markets, they are instead rooted in the fact that these markets are at different levels of maturity on a common spectrum. This is a 'continuum of consumerisation' along which a brand evolves in response to the market.

In the search for a yardstick or metric by which the maturity of a market in the context of branding, or the maturity of such brands themselves in responding to this market, Goodyear's Continuum of Consumerization presents itself as an interesting

candidate, provided that a means to determine the position of a brand or its corresponding market on such a continuum can be made.

Table 1 Mary Goodyear's Spectrum of Consumerisation and the changing roles of brands within them (Heding, Knudsen, & Bjerre, 2009) with annotations from study author

Marketing era	Role of brands		
Classic branding	Unbranded	Commodities, packaged goods Major proportion of goods in nonindustrialized context Minor role Europe/United States Supplier has power	← unbranded China factory clothing
	Brand as reference	Brand name often name of maker Name used for identification Any advertising support focuses on rational attributes Name over time becomes guarantee of quality/consistency	← Various mass-market brands
	Brand as personality	Brand name may be 'stand-alone' Marketing support focuses on emotional appeal Product benefits Advertising puts brand into context	← Giordano, British India
Postmodern branding	Brand as icon	Consumer now 'owns' brand Brand taps into higher-order values of society Advertising assumes close relationship Use of symbolic brand language Often established internationally	← Lacoste, Levis
	Brand as company	Brands have complex identities Consumer assesses them all Need to focus on corporate benefits to diverse 'customers' Integrated communication strategy essential through-the-line	← Nike, Reebok
	Brand as policy	Company and brands aligned to social and political issues Consumers 'vote' on issues through companies Consumers now 'own' brands, companies and politics	← Benetton

Implications of the Continuum of Consumerisation to Brand Decision-Makers

Goodyear proposed that while brands must differentiate enough from the competition, certain strategies for branding may not suit a market that is not ready for it (i.e., the market has yet to reach the level of maturity needed). For example, if a market has reached a level where brands can no longer differentiate based on product features alone, any strategy still reliant on pushing such features would not meet what the market desires. On the other hand, any branding efforts pushing for higher-order values such as environmentalism, social justice, political advocacy etc. may be

wasted on a market that has not yet reached that level of maturity and can differentiate between brands purely at the emotional level.

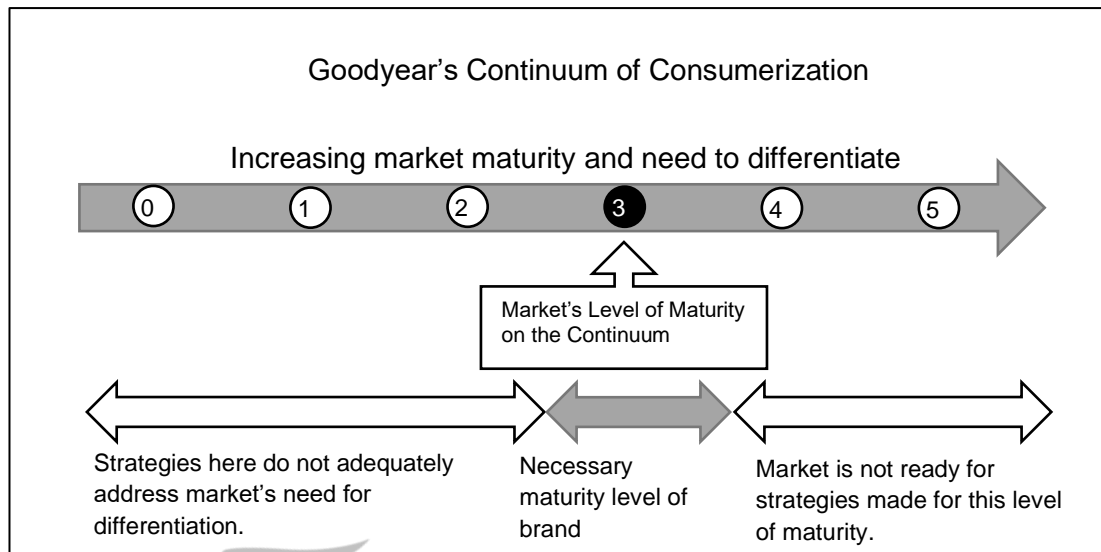


Figure 3 Example of the implications of a market at maturity level 3 on the Continuum of Consumerization compared to potential strategies

2.2. Preceding Studies Using the Goodyear Continuum

The Goodyear Continuum was proposed in a journal paper as the synthesis of Mary Goodyear's experience in working in the field of marketing and branding. The paper itself did not substantiate the theory further through empirical study, but as McEnally & de Chernatony (1999) point out, there is practical value to adopting a model developed by a practitioner. Ranjan & Jain (2011) attempted to assign various Indian brands to the Goodyear Continuum, but the paper is an example of how without a strict methodology in its use the placement of such brands on the scale may appear subject to opinion and overly qualitative.

Fagerlin & Georgescu 2011

As a precedent, a Masters of Communications thesis for the University of Gothenburg (Fagerlin & Georgescu, 2011) can be compared. The study only attempts to measure the level a specific Swedish company *BildelsSpecialisten* (BDS) has reached on the Goodyear Continuum of Consumerisation. They carried this out via a novel qualitative

analysis of semiotics (communications signals) from the company across the years, comparing them to the markers Goodyear indicated on her continuum. They found that the brand is still at one of the earlier stages, "Brand as Personality". The study is interesting in what it attempts to do and could be replicated in its entirety but would require a period allocated that is not sufficient for the specific research requirements of this paper. Moreover, it does not gauge if the level of the brands evolution fits its market which Goodyear implies to do.

Lin 2007

Ping-Kuan Lin uses the Goodyear Continuum to assess the level of maturity of Taiwan's electronics brand Trend Micro. This was a qualitative study via interviews with the CEO. The paper shows how the process of assigning a level of maturity based on the model can be methodical and analytical. Unfortunately, Lin showed some misunderstanding of the use of the model. For example, when it was evident that Trend Micros had not reached the last three stages on the continuum, Lin proposed that the model be revised to remove these last stages. However, the point of the scale is to measure the level of maturity of the brand. If the brand had yet to reach those stages it simply means it had not reached those levels of maturity yet whether due to market-driven or internal considerations.

2.3. Contextual Insight from Studies on Modest Fashion

The Expanded Scope of Differentiation from the Goodyear Continuum

Modest fashion is now a highly competitive market. Muhamad Izzudin et al (2018) notes that prominent fashion brands including the likes of Zara, Mango, Nike and so on have been making headway into a market where 40% out of the 1.8 billion Muslim consumers are under 25 years of age.



Figure 4 US fencer Ibtihaj Muhammad modelling Nike's sports hijab (Nike website, 2017)

Muhamad Izzudin proposes the 'Halal Brand Personality' as a strong means of differentiation in this market. However, on the Goodyear Continuum this just one of the earlier stages of the evolution of a brand i.e., Brand as Personality. Arguably, many such brands now already have an established personality, and the market may have already reached this stage of maturity, although this study may yet prove otherwise in its findings.

The Goodyear Continuum presents three more stages of maturity for the brand beyond establishing a Brand Personality. Each of those stages need further study, but nevertheless the framework is there to take the competition to the next level until the terminal stages of maturity are achieved.

Brand Equity vs Brand Loyalty as a Yardstick of Impact

Having identified Goodyear's model as suitable for measuring the maturity of the market in terms of brand evolution, a way must be found to determine useful correlations to measure impact. One such metric to be correlated with is brand equity. Ironically this is one of those items that can have multiple definitions and confused

meaning. To simplify, the definition made by David Aaker in his seminal book *“Managing Brand Equity”* (2009) quoted verbatim as below:

Brand equity is a set of brand assets and liabilities linked to a brand, its name and symbol, that add to or subtract from the value provided by a product or service to a firm and/or to that firm’s customers.

Here, brand equity is defined relative to utility or business value of the product or service. Good brand equity will add to the value of a product to a consumer beyond its utility. Per the definition, it is in fact possible to have negative brand equity i.e., for a product to be considered as having less value than the utility it offers to the consumer.

Aaker then stipulates in the book five components of brand equity:

- Brand loyalty,
- Brand awareness,
- Brand image / perceived quality,
- Brand associations beyond its perceived quality, and
- Brand assets i.e., Intellectual Property derived from the brand such as trademarks, industrial design, patents etc.

While the final component, brand assets, may be difficult to obtain and evaluate in a short period, the others may be measured to some extent via questionnaires to the actual consumers themselves.

One study that affirms the usefulness of the Aaker model was carried out by Jumiaty & Norazah (2015) which measured the correlation between the four components mentioned above (ignoring brand assets) and brand equity among young consumers. There is a slight issue with the study in that the questions establishing brand equity could themselves have been questions for one of the components. However, the results of the study show positive correlations between all variables, and as such

shows that brand equity could potentially be measured in future studies from measuring the four of the five components Aaker proposed, perhaps even with just one of them.

Indeed, one way of simplifying the measurement of brand equity is through simple measurement of brand loyalty. Aaker defines this as a measure of attachment to one brand. A popular tool used to measure this is the Net Promoter Score (NPS) proposed by Reicheld (2003), which measures customer's predisposition to advocate for a product or brand on a Likert scale, usually from 1 to 10.

2.4. Research Theoretical Framework & Hypotheses

Mary Goodyear's theory of brand evolution sets out six stages to the evolution of brands, reflecting the market's maturity. The first stage is referring to unbranded products i.e., commoditised goods, and has no relevance to this study. The study will instead focus on the remaining five stages, which will together determine the level of maturity of the market. Each stage will be measured in terms of its correlation to the product's Brand Equity.

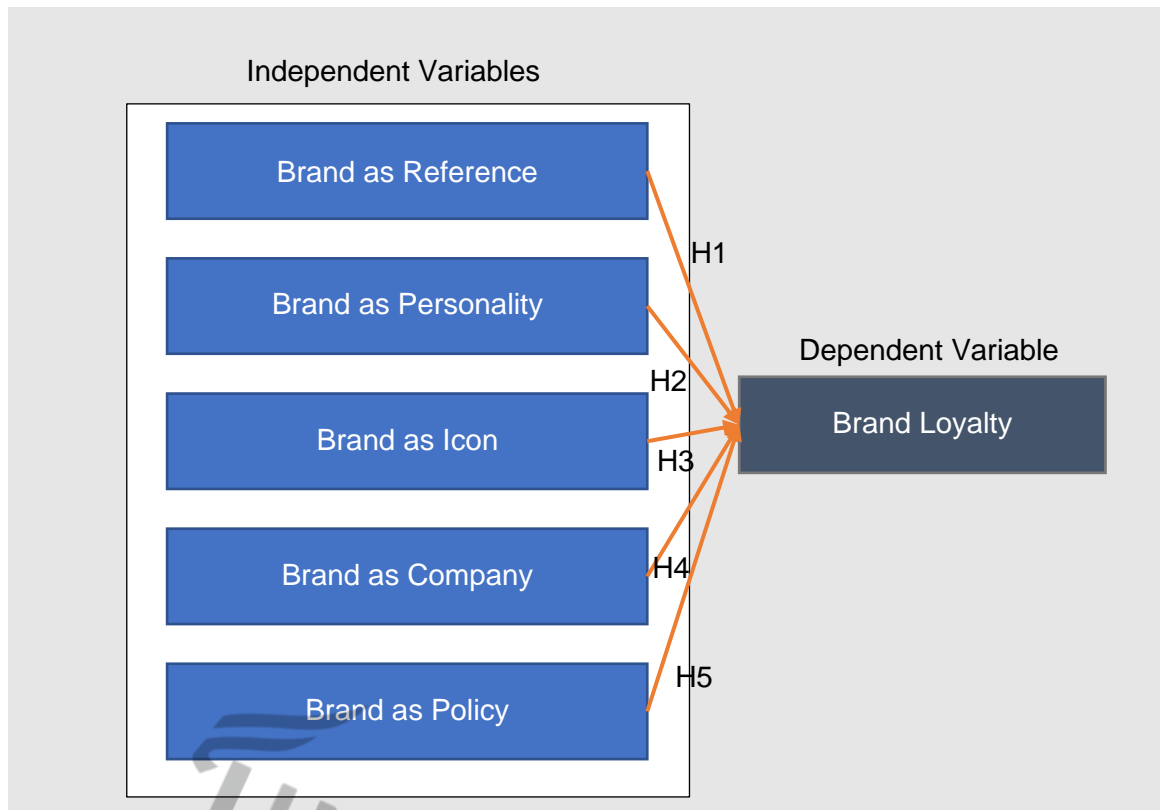


Figure 5 Proposed theoretical framework adapted from Mary Goodyear (1996) with Brand Equity to be determined per Aaker.

Setting the Hypotheses

Each stage of the Goodyear Continuum has indicators that place brands in that category. Brands may occupy multiple categories in which case the highest stage is considered the stage of maturity. While Goodyear herself has designated indicators in her own paper, Mcenally & Chernatony significantly expands upon each category giving a clearer picture of how each category can be separated. This is despite acknowledging that the boundaries between each category can be blurred.

Table 2 Branding stages of maturity per Mcenally & Chernatony

Branding Stage of Maturity	Indicators	Hypothesis
Stage 0: Unbranded	No mark of differentiation. Goods are commoditised. Value purely based on utility and price.	No hypothesis made but will emerge from study if respondents do not identify brands.
Stage 1 Brand as Reference	Brand used as identifier associated with utility and quality. Brand name is considered before price.	H1 - The Brand as Reference has a positive correlation with Brand Loyalty
Stage 2: Brand as Personality	Brand adopts emotive qualities and has a 'personality'. Benefits expressed in psychological or social terms.	H2 - The Brand as Personality has a positive correlation with Brand Loyalty
Stage 3: Brand as Icon	The brand stands for something beyond itself – category defining or value symbol. Consumer 'owns' the brand, dictating values in addition to or instead of what the brand custodian sets.	H3 - The Brand as Icon has a positive correlation with Brand Loyalty
Stage 4: Brand as Company	Brand takes on complex identity with multiple touchpoints. Shift towards corporate umbrella branding. Multi-stakeholder engagement beyond consumers including employees, investors, community etc.	H4 - The Brand as Company has a positive correlation with Brand Loyalty
Stage 5: Brand as Policy	Brand association with ethical, social and political issues. Consumers select brands aligned with personal goals.	H5 - The Brand as Policy has a positive correlation with Brand Loyalty

For this study, the stages have been renumbered to start from Stage 0 for unbranded goods, whereas both Goodyear and Mcenally / Chernatony place that as Stage 1. This is done for two reasons: the study omits the initial stage as irrelevant as the focus is on the brands themselves; and Stage 0 appears more apt as defining the baseline of zero branding.

However, the possibility of the market being at Stage 0 cannot be dismissed. The most apparent indicator of this would be if majority of respondents cannot recall or identify any brand.

Setting the Dependent Variable

The dependent variable to be established is Brand Loyalty. Originally, the research was conceived to use the more holistic metric of Brand Equity. Jumiati & Norazah (2015) have shown that Brand Equity has sufficient correlations to the elements of the Aaker model such that those elements can then be used as input for the dependent variable.

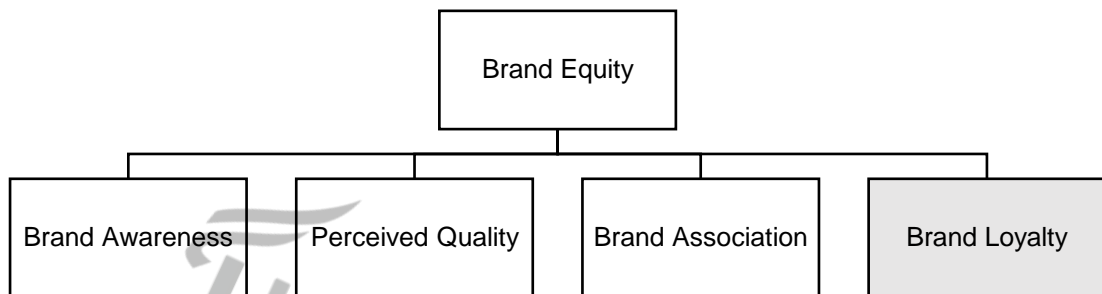


Figure 6 Brand equity components per the Aaker Model removing IP elements as adapted from Jumiati & Norazah

However, the problem is that Brand Equity is still a composite variable dependent on several smaller dependent factors. We can utilise Brand Loyalty instead as a metric as it has established means to determine support, the least of it the Net Promoter Score (NPS) developed by Reicheld of Bain & Company. Reicheld continues to advocate the NPS stating that it is "the one number you need to grow" (Reichheld, 2003). The main advantage of NPS is its simplicity, and ease of adoption onto the Likert Scale.

CHAPTER 3 METHODOLOGY

This study is subject to time and resource constraints and thus cannot be carried out at a comprehensive level. It is for this reason that the modest fashion industry is chosen rather than a broad population-wide study across multiple sectors. Moreover, to further reduce the time required to deliver the study, only one brand will be focused on.

3.1. Sampling Method

Data for this study is collected via survey questionnaires with answers on a Likert Scale and distributed via an online form i.e., sampling by convenience. This is attempted to replicate the sample size sought by Jumiati & Norazah (2014) which covered a similar subject matter of branding in fashion and follows Roscoe (1975) in setting an acceptable sample size of 30-500. The size of the sample required is influenced by the expectation that the answers should be skewed due to the way the questionnaire is structured.

3.2. Questionnaire Design

The questionnaire is based on the five hypotheses, with three items per hypothesis, and a further three questions to measure brand loyalty. The questionnaires will be prefaced with a brief set of descriptive questions to allow division of the respondents along demographic lines.

Questions for Setup

To set up the rest of the questionnaire and establish independent variables, the questionnaire must lead the respondent to establish which brand they are referring to. This starts with establishing demographics of the respondent and with an explanation of what the study is covering. The suggested questions for these are:

- Gender: M/F/Unspecified
- Age Bracket: 18 to 24 / 25 to 34 / 35 to 44 / 45 to 54 / 55 to 64 / 64 & older
- How many pieces of modest fashion do you buy in a year?
- How much in Malaysian Ringgit do you spend on modest fashion in a year?
- What is your favourite modest fashion brand? (If you have multiple favourites, choose one).

Questions for Independent Variables

Unfortunately, the precedents in using the Goodyear model in the literature review are mostly qualitative in nature and do not provide sufficient support to suggest the most appropriate questions to ask for this study.

While Jumiati & Norazah provide some precedent for simplicity of design for the questionnaire, the questions used I'm not for establishing the same set of independent variables and therefore cannot be replicated in this study. Therefore, most of the questions used in this study had to be designed from scratch.

The questions set for independent variables follow the suggested features of each stage of the Goodyear Continuum per Mcenally & de Chernatony as discussed in Table 2. Their development is shared in Table 3. These questions are designed for answers established on a Likert scale which for this study will be set on a range of 1 (Strongly Disagree) to 5 (Strongly Agree) with 3 used for both neutral or no opinion responses.

Table 3 Questions generated from indicators for each stage of the model suggested by Mcenally & Chernatony (1999)

Branding Stage of Maturity	Indicators	Questions / Items
Stage 1 Brand as Reference	Brand used as identifier associated with utility and quality. Brand name is considered before price.	A1. It is easy to distinguish the name of the brand from other brand names. A2. The brand's products is easy to distinguish from its competitors via clear logos, packaging or product design. A3. I look for this brand first before I look at its price.
Stage 2: Brand as Personality	Brand adopts emotive qualities and has a 'personality'. Benefits expressed in psychological or social terms.	B1. Even if other brands have similar quality, I like the feel and look of this brand. (dropped) B2. Wearing or using this brand makes me feel good. B3. This brand has a 'personality' that I like.
Stage 3: Brand as Icon	The brand stands for something beyond itself – category defining or value symbol. Consumer 'owns' the brand, dictating values in addition to or instead of what the brand custodian sets.	C1. For cars, if I hear Volvo I think "safety", if I hear Toyota I think "reliable". For modest fashion, this brand does the same thing. C2. I feel I should have a say in what future designs the brand makes. C3. This brand is famous for other things than what its owners and marketers say.
Stage 4: Brand as Company	Brand takes on complex identity with multiple touchpoints. Shift towards corporate umbrella branding. Multi-stakeholder engagement beyond consumers including employees, investors, community etc.	D1. I would recommend anyone with the required skills to work for this brand's owner D2. How the brand's owner treats their employees and community around them affects my desire to purchase the brand's products D3. If this brand makes or has started making non-fashion products, I may consider buying them.
Stage 5: Brand as Policy	Brand association with ethical, social and political issues. Consumers select brands aligned with personal goals.	E1. This brand stands for important things happening in the world today. E2. By purchasing this brand, I support causes this brand champions. E3. If this brand endorsed a political party, it is probably going to be a party I would vote for.

Questions for the Dependent Variable

The dependent variable of Brand Loyalty is established via the following questions, one of which is a disguised NPS question (Z3), while some guidance is followed from Jumiati & Norazah:

Z1 - I would buy this brand's products even if a competing brand offered the same quality of product and features at a lower price.

Z2 - A few bad experiences with this brand won't stop me from buying other products of the same brand in the future.

Z3 - I would recommend this brand to others looking for similar products.

It is expected that the questions above should be answered towards the higher side, i.e., mostly agreed with, as the respondent will have previously established this brand as their favourite brand. If instead these factors on aggregate produce low Brand Loyalty, there are some possible reasons:

- Respondents could not settle on a favourite brand.
- Even the favoured brands actually have low loyalty, meaning the industry could be considered at a very low level of maturity or brand switching habits are very resilient.

To reiterate, this specific scenario is unlikely.

The finalised questionnaire can be viewed in Appendix 2 - Study Questionnaire.

3.3. Analysis Methods

Data analysis is carried out via open-source software alternative to IBM's SPSS: Jamovi. This is to avoid the extra cost of SPSS and unethical use via bootleg copies of the same. (The Jamovi Project, 2021)

The data will undergo reliability testing based on Cronbach's α . Bartlett's test of Sphericity will be used to further determine if the question items for each hypothesis are correlated enough. Sampling adequacy will also be tested via Kaiser Meyer Olkin

(KMO). A correlation matrix will be used to determine correlations between the variables.

The respective tests are measured against the following scales.

Table 4 Cronbach's Alpha scale (George & Mallery, 2003)

Values	Interpretations
More than .9	Excellent
More than .8	Good
More than .7	Acceptable
More than .6	Questionable
More than .5	Poor
Less than .5	Unacceptable

Table 5 Scale of KMO measure (Analysis INN, 2020)

KMO measure	Interpretation
$KMO \geq 0.90$	Marvelous
$0.80 \leq KMO < 0.90$	Meritorious
$0.70 \leq KMO < 0.80$	Average
$0.60 \leq KMO < 0.70$	Mediocre
$0.50 \leq KMO < 0.60$	Terrible
$KMO < 0.50$	Unacceptable

It is important here to view any non-correlation outcome carefully. Goodyear's model makes the overarching case that different markets and brands will mature at different rates. Thus, it is entirely possible that some stages may not have yet be reached in the market i.e., latter hypothesis that would only correlate to low Brand Equity. Part of the point of this study is to show how far the market has matured and not just to show the relationship to brand equity. For example, if the final two stages do not show enough correlation, that means the market for the brand has only matured to the third stage on the Continuum.

CHAPTER 4 STUDY RESULTS & DATA ANALYSIS

4.1. Introduction

This chapter reviews the results returned from the respondents of the study questionnaire. It will first look at a brief overview of the demographics and buying habits of the respondents. Then the general validity and reliability of the survey responses are tested, before hypotheses themselves are reviewed with respect to their correlations.

4.2. Respondent Demographics and Purchasing Habits

The survey questionnaires were distributed via Google Forms over social media groups, generally composed of a wide demographic of Malaysians from the study author's own network. The title of the questionnaire was deliberately set to disguise the true intent of the study, as a respondent may answer differently if they felt they needed to show 'maturity' in their own responses. A total of 84 respondents returned the forms, of which their demographic is recorded as per Table 6.

Table 6 Respondents' Background / Demographics

	Frequency	Percentage
Gender		
Male	32	38.1%
Female	50	59.5%
Prefer not to say	2	2.4%
Age		
18 – 24	2	2.4%
25 – 34	14	16.7%
35 – 44	44	52.4%
45 – 54	18	21.4%
55 or more	6	7.1%

The purchasing habits of the respondents are shown in Table 7. The first question in this section acted as a filter question for the whole questionnaire, directing the respondent to the end of the survey if they purchased no pieces of modest fashion in the year. This was intended to prevent such respondents from influencing the latter

questions as, since they are meant to measure factors influencing their opinion on the respondent's favourite modest fashion brand, they needed to be filled only by those who spent on modest fashion. Respondents who were filtered would still have felt they had fulfilled the questionnaire. The final question of the section asks for the respondent's favourite brand, which serves as a reference for the questions in the latter section. However, the frequency of actual brands chosen were never intended to be significant. This was also used as a filter in later analysis as any respondent who could not name a brand was filtered out.

Table 7 Respondents' purchasing habits

	Frequency	Percentage
How many pieces of modest fashion do you buy in a year?		
None	9	10.7%
1 – 2	22	26.2%
3 – 6	27	32.1%
7 – 12	15	17.9%
13 or more	11	13.1%
How much in Malaysian Ringgit do you spend on modest fashion products in a year?		
Less than RM100	19	22.6%
More than RM100 but less than RM300	24	28.6%
More than RM300 but less than RM600	18	21.4%
More than RM600	23	27.4%
Favourite Brand (only repeated mentions)		
Uniqlo	6	7%
Padini	4	5%
Coach	3	4%
Ariani	3	4%
Adidas	2	2%
Levis	2	2%
Zanzea	2	2%
Sabella	2	2%

From initial 84 respondents, 9 were removed from the sample via the filter question that established they bought no modest fashion items. From the 75 remaining, 2 were filtered for indicating they had no brand preference. Despite the smaller sample size, it is still somewhat surprising that the number of repeated mentions is small. This

shows a fairly diverse, competitive market for modest fashion. There are also brands included that are not commonly thought of as modest fashion brands. However, these are maintained due to the fact that such brands may still provide utility as modest fashion to those consumers. For example, Uniqlo is a popular brand that especially for men has loose-fitting, comfortable garments.

4.3. Brand Loyalty Analysis

Descriptive Analysis of Brand Loyalty

Since the filter question was to ask for the respondents' favourite brand, left skew was expected for all three items. However, item Z1 – “I would buy this brand's products even if a competing brand offered the same quality of product and features at a lower price” displays normal distribution. This suggests that the respondents were still very much influenced by price in their decision making. Items Z2 shows a left skew indicating that respondents were willing to forgive briefly poor experiences with the brand which is a mark of brand loyalty. The standard NPS question in item Z3 shows that there was brand loyalty among the respondents with the highest left skew among the items.

Table 8 Descriptive analysis of Brand Loyalty items Z1 - Z3

	Median	Mode	SD	Skewness	
				Skewness	SE
Z1 - I would buy this brand's products even if a competing brand offered the same quality of product and features at a lower price.	3	3.00	1.205	-0.0937	0.281
Z2 - A few bad experiences with this brand won't stop me from buying other products of the same brand in the future.	4	4.00	1.061	-0.3659	0.281
Z3 - I would recommend this brand to others looking for similar	4	4.00	0.792	-0.3722	0.281

PCA of Brand Loyalty

Principle component analysis of Brand Loyalty items revealed only one component with Eigenvalue above 1. Component loadings ranged from 0.683 to 0.744 shown in Table 9 as follows.

Table 9 Principle Component Analysis of Brand Loyalty

	Component	
	1	Uniqueness
Z1 - I would buy this brand's products even if a competing brand offered the same quality of product and features at a lower price.	0.721	0.480
Z2 - A few bad experiences with this brand won't stop me from buying other products of the same brand in the future.	0.744	0.446
Z3 - I would recommend this brand to others looking for similar	0.683	0.534

Note. no rotation was used as only one component had Eigenvalue >1

Testing the assumptions shows Bartlett's test score of and KMO levels of sufficient significance and sampling adequacy for factor analysis.

Table 10 KMO measure of sampling adequacy for Brand Loyalty

	MSA
Overall	0.612

Table 11 Bartlett's test for Brand Loyalty

χ^2	df	p
14.0	3	0.003

Table 10 KMO measure of sampling adequacy for Brand Loyalty

	MSA
Z1 - I would buy this brand's products even if a competing brand offered the same quality of product and features at a lower price.	0.609
Z2 - A few bad experiences with this brand won't stop me from buying other products of the same brand in the future.	0.597
Z3 - I would recommend this brand to others looking for similar	0.636

4.4. Stage 1 Items Analysis – Brand as Reference

Descriptive Analysis of Stage 1

Table 12 Descriptive Analysis of Stage 1 - Brand as Reference

	Median	Mode	SD	Skewness	
				Skewness	SE
A1 - The name of this brand is not similar to other modest fashion brands.	4	4.00	0.897	-0.4645	0.281
A2 - I can distinguish the brand from competitors through its clear logos, packaging or product design.	4	4.00	1.053	-1.0636	0.281
A3 - I look for the brand name first before I look for the price.	3	3.00	1.214	-0.0369	0.281

Stage 1 is considered an established level of branding, where the typical identity differentiating elements have been created and the brand itself is looked for when making purchases. Therefore, some level of left skew is expected, and this is met in the derived skewness measures in Table 12. However, item A3 showed normal distribution and since the item is price related, this may yet again be an indication of price still being a significant factor working against the brand building process.

PCA of Stage 1

Principle component analysis of Brand Loyalty items revealed only one component with Eigenvalue above 1. Component loadings ranged from 0.761 to 0.840 shown in Table 13 as follows i.e., small range differences.

Table 13 Component loadings for PCA of Stage 1 - Brand as Reference

Component Loadings	Component	
	1	Uniqueness
A1 - The name of this brand is not similar to other modest fashion brands.	0.761	0.421
A2 - I can distinguish the brand from competitors through its clear logos, packaging or product design.	0.840	0.294
A3 - I look for the brand name first before I look for the price.	0.809	0.346

Note. no rotation was used as only one component had Eigenvalue >1

Testing the assumptions shows Bartlett's test score of and KMO levels of sufficient significance and sampling adequacy for factor analysis.

Table 15 Bartlett's test for branding Stage 1

χ^2	df	p
44.1	3	< .001

Table 14 KMO Measure of Sampling Adequacy for branding stage 1

	MSA
Overall	0.667
A1 - The name of this brand is not similar to other modest fashion brands.	0.724
A2 - I can distinguish the brand from competitors through its clear logos, packaging or product design.	0.634
A3 - I look for the brand name first before I look for the price.	0.662

4.5. Stage 2 Items Analysis – Brand as Personality

Descriptive Analysis for Stage 2

Table 16 Descriptive Analysis of Stage 2 – Brand as Personality

	Median	Mode	SD	Skewness	
				Skewness	SE
B1 - I feel like this brand has a personality of its own.	4	5.00	0.854	-0.855	0.281
B2 - Wearing this brand's products makes me feel positive about myself	4	5.00	0.941	-0.831	0.281

Stage 2 is the basic goal of branding in the initial stages before more sophisticated measures are taken on. For this stage one item was eliminated at the point of distribution due to the similarity and vagueness of the wording. The expected left-skew is also displayed for both items, also reflected in the mode of distribution at the highest rating of 5.

PCA of Stage 2

Table 17 Component loadings for PCA of Stage 2 - Brand as Personality

	Component	
	1	Uniqueness
B1 - I feel like this brand has a personality of its own.	0.920	0.153
B2 - Wearing this brand's products makes me feel positive about myself	0.920	0.153

Note. no rotation was used as only one component had Eigenvalue >1

Stage 2 component loadings were equivalent at 0.920. There is a risk here that the items despite being addressed for different aspects of the personality of brands the respondents have nevertheless interpreted them similar ways.

Table 19 Bartlett's test for branding Stage 3

χ^2	$\frac{d}{f}$	p
46.2	1	< .001

Table 18 KMO Measure of Sampling Adequacy for branding Stage 3

	MSA
Overall	0.500
B1 - I feel like this brand has a personality of its own.	0.500
B2 - Wearing this brand's products makes me feel positive about	0.500

The KMO analysis of Stage 2 shows low KMO score that is expected with only 2 items. It's not impossible to get a better score so there is a possibility the two items were similar measures at the very least in interpretation by the respondent. Nevertheless, Bartlett's test shows sufficient significance with χ^2 of 46.2.

4.6. Stage 3 Items Analysis – Brand as Icon

Descriptive Analysis for Stage 3

Table 20 Descriptive Analysis of Stage 3 – Brand as Icon

	Median	Mode	SD	Skewness	
				Skewness	SE
C1 - For cars, Volvo stands for "safety". For modest fashion, this brand also stands for some positive value.	4	4.00	0.911	-0.456	0.281
C2 - I want to have a say in what future designs the brand makes.	3	4.00	1.015	-0.297	0.281
C3 - This brand is known for other good values than what is promoted.	4	4.00	0.908	-0.609	0.281

Stage 3 again shows the expected left skew for all items. The mode response for all items was 4, which presents an interesting outcome as this stage of brand evolution is the most advanced of the "classical marketing" stages designated by Goodyear on the spectrum. The skew is not as strong on item C2 – "I want to have a say in what

future designs the brand makes”, possibly because respondents are not yet used to the idea that they can have a say in the design of the products they consume even though in actuality they are already doing it by requesting on social media platforms for specific kinds of products or designs from the producers.

PCA of Stage 3

Table 21 Component loadings for PCA of Stage 3 - Brand as Icon

	Component	
	1	Uniqueness
C1 - For cars, Volvo stands for "safety". For modest fashion, this brand also stands for some positive value.	0.837	0.299
C2 - I want to have a say in what future designs the brand makes.	0.637	0.595
C3 - This brand is known for other good values than what is promoted.	0.840	0.295

Note. no rotation was used as only one component had Eigenvalue >1

Stage 3 component loadings ranged from 0.637 to 0.840, again highlighting C2 with the lowest loading though still at acceptable loading levels.

Table 23 Bartlett's test for branding Stage 4

χ^2	df	p
37.5	3	< .001

Table 22 KMO Measure of Sampling Adequacy for branding Stage 4

	MSA
Overall	0.606
C1 - For cars, Volvo stands for "safety". For modest fashion, this brand also stands for some positive value.	0.579
C2 - I want to have a say in what future designs the brand makes.	0.771
C3 - This brand is known for other good values than what is promoted.	0.578

KMO analysis shows low but acceptable adequacy for items C1 and C2, with Bartlett's test showing sufficient correlation between the items.

4.7. Stage 4 Items Analysis – Brand as Company

Descriptive Analysis for Stage 4

Table 24 Descriptive Analysis of Stage 4 – Brand as Company

	Median	Mode	SD	Skewness	
				Skewness	SE
D1 - I would recommend anyone with the required skills and passion to work for this brand's company.	4	3.00	0.979	-0.1024	0.281
D2 - How the brand's owner treats employees and the community around them affects my desire to purchase their products.	4	4.00	0.791	0.0978	0.281
D3 - I have bought, or may consider buying, any non-fashion products from this brand.	4	4.00	1.005	-0.4075	0.281

Descriptive Analysis for Stage 4 begins showing different responses to prior stages. While items D1 and D3 both show expected left skew, albeit with D1 closer to normal, item D2 – “How the brand's owner treats employees and the community around them affects my desire to purchase their products” shows a *right* skew, also closer to normal. Even though the median of this question is 4, the distribution suggests that many respondents do not let the way brands treat their employees should affect their purchases.

PCA of Stage 4

Table 25 Component loadings for PCA of Stage 4 - Brand as Company

	Component	
	1	Uniqueness
D1 - I would recommend anyone with the required skills and passion to work for this brand's company.	0.839	0.297
D2 - How the brand's owner treats employees and the community around them affects my desire to purchase their products.	0.778	0.395

	Component	
	1	Uniqueness
D3 - I have bought, or may consider buying, any non-fashion products from this brand.	0.660	0.565

Note. no rotation was used as only one component had Eigenvalue >1

Component loadings of stage 4 items are all at acceptable levels with D1 - “I would recommend anyone with the required skills and passion to work for this brand's company” having the highest loading of 0.839.

Table 27 Bartlett's test for branding Stage 4

χ^2	df	p
30.0	3	< .001

Table 26 KMO Measure of Sampling Adequacy for branding Stage 4

	MSA
Overall	0.599
D1 - I would recommend anyone with the required skills and passion to work for this brand's company.	0.569
D2 - How the brand's owner treats employees and the community around them affects my desire to purchase their products.	0.592
D3 - I have bought, or may consider buying, any non-fashion products from this brand.	0.686

KMO measures for Stage 4 items show sufficient but low scores, while Bartlett's test similarly shows acceptable output.

4.8. Stage 5 Items Analysis – Brand as Policy

Descriptive Analysis for Stage 5

Table 28 Descriptive Analysis of Stage 5 – Brand as Policy

	Median	Mode	SD	Skewness	
				Skewness	SE
E1 - This brand champions important things happening in the world today.	3	3.00	0.937	-0.0158	0.281
E2 - If this brand endorsed a political party, it is probably going to be a party I would vote for.	2	1.00	0.998	0.3183	0.281

	Median	Mode	SD	Skewness	
				Skewness	SE
E3 - If this brand advocates certain causes, it is not just doing it as a gimmick.	3	3.00	0.962	-0.2730	0.281

Descriptive Analysis of Stage 5 shows the most marked departure from the other stages. While there were slight item E1 showed normal distribution and E3 with a left skew, E2 showed the strongest right skew of all items in the study, with respondents generally disagreeing with the idea that “if this brand endorsed a political party, it is probably going to be a party I would vote for”. This is shown by a median of 2 and an extreme low mode of 1. This is significant in many ways and will be discussed later in further analysis of the findings.

PCA of Stage 5

Table 29 Component loadings for PCA of Stage 5 - Brand as Policy

	Component	
	1	Uniqueness
E1 - This brand champions important things happening in the world today.	0.654	0.572
E2 - If this brand endorsed a political party, it is probably going to be a party I would vote for.	0.693	0.519
E3 - If this brand advocates certain causes, it is not just doing it as a gimmick.	0.582	0.662

Note. no rotation was used as only one component had Eigenvalue >1

PCA analysis shows that Stage 5 items generally have lower loadings though all were at acceptable levels.

Table 30 Bartlett's test for branding Stage 5

χ^2	df	p
3.13	3	0.372

Table 31 KMO Measure of Sampling Adequacy for Stage 5

	MSA
Overall	0.550
E1 - This brand champions important things happening in the world today.	0.548
E2 - If this brand endorsed a political party, it is probably going to be a party I would vote for.	0.540
E3 - If this brand advocates certain causes, it is not just doing it as a gimmick.	0.572

While sampling adequacy for

Stage 5 was at low but acceptable levels, Bartlett's test shows that the items may not have sufficient redundancies to be measured together. Removal of items does not fix this. This will be discussed in the concluding analysis of the paper.

4.9. Reliability Testing

Reliability is a measure of how well a study can be repeated with the same sample to produce similar results. One such test for reliability is Cronbach's α . This is shown as per Table 32. It is apparent that there are some reliability issues, in particular Stage 5 – Brand as Policy. However, we avoid discarding this altogether as inspection of the individual item shows that there is an inherent reaction against one specific item.

Table 32 Scale reliability statistics of study factors

Factor	Cronbach's α	Interpretation
Brand Loyalty	0.515	Poor
Brand as Reference	0.721	Acceptable
Brand as Personality	0.817	Good
Brand as Icon	0.657	Questionable
Brand as Company	0.627	Questionable
Brand as Policy	0.296	Unacceptable

Factor	Cronbach's α	Interpretation
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It may simply be an indicator of some discomfort in the respondents in answering the Stage 5 questions in particular item E2. While it is possible the items can be improved further, it must be kept in mind that at stages where the market has not yet reached, responses are expected to be dissonant, and this can lead to lower reliability scores.



4.10. Correlation Analysis & Hypothesis Testing

Table 33 Correlation Matrix of Brand Loyalty and the five stages of brand evolution per Goodyear's Spectrum

	Brand Loyalty	Brand as Reference	Brand as Personality	Brand as Icon	Brand as Company	Brand as Policy
Brand Loyalty	—					
Brand as Reference	0.549 ***	—				
Brand as Personality	0.621 ***	0.485 ***	—			
Brand as Icon	0.559 ***	0.385 ***	0.696 ***	—		
Brand as Company	0.389 ***	0.332 **	0.562 ***	0.616 ***	—	
Brand as Policy	0.338 **	0.320 **	0.265 *	0.316 **	0.348 **	—

Note. * $p < .05$, ** $p < .01$, *** $p < .001$

On first reading of the analysis of the Pearson's correlation matrix, all hypotheses for correlation are met. However, a better overview can be seen in the correlation coefficients and significance levels. The hypotheses confirmations are as below:

- Hypothesis 1. Stage 1 – Brand as Reference correlates to Brand Loyalty: Hypothesis accepted with moderate correlation coefficient of 0.549 and high significance ($p < 0.001$).
- Hypothesis 2. Stage 2 – Brand as Personality correlates to Brand Loyalty: Hypothesis accepted with moderate correlation coefficient of 0.621 and high significance ($p < 0.001$).
- Hypothesis 3. Stage 3 – Brand as Icon correlates to Brand Loyalty: Hypothesis accepted with moderate correlation coefficient of 0.559 and high significance ($p < 0.001$).
- Hypothesis 4. Stage 4 – Brand as Company correlates to Brand Loyalty: Hypothesis accepted with *weak* correlation coefficient of 0.389 and high significance ($p < 0.001$).
- Hypothesis 5. Stage 5 – Brand as Policy correlates to Brand Loyalty: Hypothesis accepted with *weak* correlation coefficient of 0.338 and moderately high significance ($p < 0.01$).

While all hypotheses have been accepted, the strength of the correlations suggests that the market per the sample is at brand evolution Stage 3 - Brand as Icon. This is the highest level of “Classical branding” maturity from Goodyear’s spectrum, whereas correlations to “Post-modern” stages of evolution are significantly weaker.

There is no suggestion shown by the data of ‘skipping’ of stages of evolution where for example Stage 1 is weakly correlated but latter stages stronger. Thus, the sampled market displays signs of every stage of evolution leading up to and including Stage 3 which includes:

- Brand used as identifier associated with utility and quality. (Stage 1)
- Brand name is considered before price. (Stage 1)
- Brand adopts emotive qualities and has a ‘personality’. (Stage 2)
- Benefits expressed in psychological or social terms. (Stage 2)
- The brand stands for something beyond itself – category defining or value symbol. (Stage 3)
- Consumer ‘owns’ the brand, dictating values in addition to or instead of what the brand custodian sets. (Stage 3)

(McEnally & de Chernatony, 1999)

While there are significant enough correlations for the final two “post-modern” stages of brand evolution, the weaker correlations suggests that they do not affect overall Brand Loyalty as much as the earlier stages.

CHAPTER 5 CONCLUSION & RECOMMENDATIONS

In this chapter, further analysis and discussion of the findings in Chapter 4 is made and recommendations are presented for both brand custodians as per the research objectives as well as for future research.

5.1. Further Discussion of Findings

Implications of the market's revealed stage of maturity

In answering the first research question, the revealed level of maturity of the market on Goodyear's spectrum of consumerisation shows that the level of competition in modest fashion in Malaysia has reached a point that consumers are more receptive to brands being icons in their own right. One of the most salient examples of this are brands prominently displaying brand emblems instead of their name in text.



Figure 7 Innersejuk hijab showing the emblem but no brand name

This is due to several factors. Brands adopting the iconic approach have established their values such that they bring categorical meaning beyond the product's own utility or emotional value. For example, Volvo means safety, Adidas means soccer quality, Body Shop with environmental consciousness etc (McEnally & de Chernatony, 1999). In the modest fashion market, Duck is *the* hijab brand symbolic of the category. They have also been in the

market long enough for their logos to be recognised separate from the name, the same way the Petronas emblem does not need to have the Petronas name attached

to be recognised. Finally, consumers must be used to the product category enough that their utility need not be explained. The modern hijab has certainly been around long enough for this, but it's possible for some elements of modest fashion to not yet be at this level e.g., modest swimwear.

Also, McEnally and de Chernatony warn against using the spectrum to adopt homogeneous approaches. As they mention:

...different brands may be in any one of the six stages; brands may change strategies (for example, from reference to personality); new brands may enter at any stage and the branding process in a particular product category may never complete all six stages. (McEnally & de Chernatony, 1999)

Thus, it should not be interpreted that brands should not at all progress beyond this stage of brand evolution. However, such brands must then accept that they would be addressing the smaller niche, but using that as a major differentiator to establish stronger brand loyalty in a smaller segment. This is the approach of the Body Shop and Benetton in marketing their products with a brand that is considered to have reached the final stage of evolution – Brand as Policy.

Price sensitivity

Despite the fact that users remain loyal to their favourite brands, displaying positive responses to the brand loyalty measure especially the NPS question in item Z3 – “I would recommend this brand to others looking for similar products”, there is still evidence of price sensitivity. The price-related items Z1 – “I would buy this brand's products even if a competing brand offered the same quality of product and features at a lower price” and A3 – “I look for the brand name first before I look at the price” showed neutral perceptions with normal distributions instead of strong left skew.

Strong counter-signals in Stage 5 – Brand as Policy

While in general the overall correlations between the five stages and Brand Loyalty are positive, the final stage “Brand as Policy” showed a marked difference in responses. The inherently political nature of this stage does not appear to be compelling for the respondents and the most political of the items “If this brand endorsed a political party, it is probably going to be a party I would vote for” showed a very strong right skew with the mode response being “strongly disagree”.

It is possible that users have misread this item, one of the risks of using online surveys. Users may be less hostile to the idea if for example it could be explained to them that some brands would be inherently political e.g., Benetton as a diversity-oriented brand would always be in political support of progressive political platforms. The other possible interpretation is simply that consumers have not reached this level of acceptance, similar to how the highest level of Maslow’s pyramid is not necessarily easy to achieve (McEnally & de Chernatony, 1999).

Reliability and validity issues

There is another factor in the study that may have affected the output specifically for Stage 5. The items established for this stage led to low Cronbach’s α , and failing of Bartlett’s test of Sphericity. The issues related to this would only be reliably fixed by improved question design, a better survey method unachievable with the time and resources available with this study (i.e., obtained face to face so questions can be explained) and the number of items would need to be increased.

Indeed, the entire study would have benefited from an increase in the number of items, but this would have in turn required a much higher number of respondents to return better results.

5.2. Recommendations

Recommendations for modest fashion industry players

Answering the second research question, the findings of the study suggests that marketing managers, brand custodians and product developers for the modest fashion industry should consider the following:

- i. **The market has progressed beyond “Brand as Reference” and “Brand as Personality”.** It is therefore fundamentally a given that any brand wishing to participate in this market must be able to differentiate itself from competitors through identity elements such as naming, logos and product design. It is also a given that such brands must inherently appeal to its target market on an emotional level, invoking a brand personality. While there will always be room for commoditised goods, the level of competition presents adopting a brandless strategy as risky.
- ii. **Do not ignore price.** Even though brands may adopt premium pricing models or seek improved margins by leveraging on their brands, they are still susceptible to switching behaviour in their customer base due to price. Thus, pricing decisions must always be taken with care.
- iii. **Brands can invest more into developing iconic status.** With the market at the stage “Brand as Icon”, brand custodians can start aggressively marketing to place their brands as icons. For example, the use of graphical elements in their communications to e.g., an emblem logo instead of a wordmark can be fostered through repeated exposure to their target market. Slogans and catchphrases intended to highlight specific brand values could be used to further associate the brand with specific elements they are meant to represent. Note it is up to those brand custodians themselves to determine what values

these should be from a strategic standpoint, but the study shows that they would not be amiss in spending more resources to push the strategy.

- iv. **Be wary of adopting high-concept or political approaches.** While in conventional fashion brands such as Benetton and their “Colours of Benetton” campaign have had success being at the highest stage of brand evolution, the Malaysian market may not be ready for it. Even if such sociopolitical approaches do not create a negative response in the market, spending resources in this strategy may have lower outcomes at least in relation to establishing brand loyalty. This is not to entirely discount the strategy, just that such brands must be prepared for a significantly lower share.

Recommendations for future study

This study has shown that Goodyear’s spectrum has a compelling use case as tool for brand strategists to measure the level of maturity of their market with respect to brand adoption and then develop strategies to suit. However, the fact is the subject needs much more empirical analysis to be refined as a tool.

Any future study based on the model adopting the same approach as this study must do the following:

- i. **Obtain a larger sample size but with a more controlled environment.** The survey should have more items to avoid issues with reliability encountered in this study. The survey should be guided with respondents answering with prompts and explanations by the surveyor. This is especially important for some high concepts such as those items in Stage 5- Brand as Policy. It would be a significantly more resource intensive approach as with more items there needs to be a larger sample size.

- ii. **Consider restricting to one brand.** The logistics and time frame of this study pushed it towards a more general approach. Restricting to one brand should produce a significantly more reliable output with lower respondent numbers. It is still possible to continue with the general approach, but reliability must be improved significantly per the first recommendation e.g., through a much higher number of respondents.
- iii. **Filter by gender.** This study avoided filtering results by gender as the number of respondents was already low. Future studies with better resources could push for female only respondents when it comes to modest fashion. This is because products in this category differ so greatly between the genders.

Finally, study proponents must take it upon themselves to truly understand what Goodyear's spectrum is about, as some of the studies in literature review have shown a lack of understanding.

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APPENDIX 1 LITERATURE REVIEW TABLE


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Author	Year	Publication	Source Type	Objective	Methodology	Findings
Tilde Heding; Charlotte F Knudsen; Mogens Bjerre	2009	Brand Management: Research, Theory and Practice, Pg 250-251	Book Chapter	Describe Mary Goodyear's theory of brand evolution	n/a	Mary Goodyear's theory of brand evolution is an overarching framework which covers multiple approaches to brand management.
Mary Goodyear	1996	International Journal of Market Research	Journal Article	Propose a theory of brand evolution to address mismatch of brand assessment between different markets	n/a	Breaks down brand evolution into six stages of which four are 'Classic' whereas two are 'Post-Modern'. The brand's evolution needs to match what stage of maturity the market is in. This is why some advanced branding techniques do not work in some markets - it is not yet mature enough.
David A Aaker	1991	Managing Brand Equity: Capitalizing on the Value of a Brand Name	Book Chapter	Define brand equity and its components.	n/a	Improving brand equity is of substantial benefit to businesses and can be measured through the five factors mentioned.
Jumiati Sasmita; Norazah Mohd Suki	2015	International Journal of Retail & Distribution Management Vol. 43 No. 3, pp. 276-292	Research Article	Examine the effects of brand association, brand loyalty, brand awareness, and brand image on brand equity among young consumers	200 samples survey data analysed using descriptive, correlation and multiple regression analysis	All four factors have positive correlation to Brand Equity. Note: Measure of Brand Equity could be considered questionable, however this study usefully reaffirms Aaker's model.

Author	Year	Publication	Source Type	Objective	Methodology	Findings
Paul Temporal	2000	Branding in Asia: The Creation, Development and Management of Asian Brands for the Global Market	Book Section, pg 4-7	Shows the trends indicating for a need for strong brands in Asia	n/a	There are seven emerging trends for brands at the turn of the century: <ul style="list-style-type: none"> i. Breakdown of market boundaries, ii. Globalisation and global brands, iii. Increasing market fragmentation, iv. Product diversity and shorter life cycles, v. Greater market sophistication, vi. Digitalisation, and vii. Market volatility.
Madelein Fagerlind; Oana Georgescu	2011	Brand (re)birth: A case study of the company BDS and their internal brand evolution	Disser-tation	Determine how the brand image BDS has evolved internally throughout the company's history and how the values are reflected in the process	Case study of BDS via data provided by BDS and analysis of semiotics (communications elements) instead of interviews	BDS has reached the 3 rd stage: Brand as Personality
Muhamad Izzuddin Bin Zainudin, Al-Amirul Eimer Bin Ramdzan Ali, Ahmad Syahmi Ahmad Fadzil, Mohammad Fahmi Sarin, Nur Ain Syazmeen Binti Ahmad Zaki, Abdul Kadir Othman, Faridah Haji Hassan	2018	International Journal of Asian Social Science Vol. 8, No. 11, 985-994	Conceptual paper	To examine the influence of Halal brand personality on brand loyalty among Millennials modest fashion consumers in Malaysia.	n/a	n/a

Author	Year	Publication	Source Type	Objective	Methodology	Findings
Ping-Kuan Lin	2007	Revising the Brand Evolution Stage Model - a Case Study of an Asian IT Company	Study	Explore the brand evolution stage model using a case study approach in an anti-virus software industry context.	Qualitative review via interview	Proposed to revise Goodyear model to match only what the subject of study followed.
M Mcenally, L. de Chernatony	1999	The Evolving Nature Academy of Marketing Science Review Volume 1999 No. 02	Paper/ Journal Article	Extension of Goodyear's model	Literature review	Expanded interpretation of Goodyear continuum allowing for improved identification of each stage.


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APPENDIX 2 STUDY QUESTIONNAIRE

Kajian Sikap Pengguna Terhadap Jenama Fesyen Sederhana di Malaysia | *Study on Consumer Attitudes Towards Modest Fashion Brands in Malaysia*

Peserta kajian yang dihormati,

Saya Kamal Abdollah, pelajar pascasiswazah untuk program Sarjana Pentadbiran Perniagaan UniRazak. Ini adalah tinjauan yang saya jalankan untuk penyelidikan saya tentang penjenamaan fesyen sederhana.

Tesis ini melibatkan pengkajian sejauh mana landskap penjenamaan untuk pasaran fesyen sederhana di Malaysia telah berkembang. Ia akan menunjukkan sama ada pasaran Malaysia kini menuntut jenama dan produk yang lebih canggih, atau jika masih ada ruang untuk menggunakan strategi yang telah lama teruji dalam mempromosikan jenama fesyen sederhana.

Sila jawab soalan-soalan berikut sejujur yang boleh. Ia seharusnya tidak mengambil masa lebih daripada 10 minit. Jawapan anda rahsia, nama anda tidak diambil dan data tinjauan ini diambil bukan untuk tujuan dijual. Terima kasih atas sokongan anda!

Dear Survey Respondent,

I am Kamal Abdollah, a postgraduate student for UniRazak's Masters of Business Administration program. This is a survey I am conducting for my research on branding for modest fashion.

The thesis involves studying how far the branding landscape for modest fashion in Malaysia has evolved. It will show if the market now demands more sophisticated brands and products, or if there is still room to adopt tried and tested strategies in promoting modest fashion brands.

Please answer the following questions as honestly as you can. It shouldn't take you more than 10 minutes. Your answer is kept confidential, your name is not recorded and the survey data will not be sold for commercial purposes. Thank you for your support!

Latar Belakang Peserta | *Respondent Background*

i. Apakah jantina anda? / *What is your gender?*

- Lelaki / Male
- Perempuan / Female
- Tidak ingin menyatakan / Prefer not to say

ii. Berapa usia anda? / *How old are you?*

- 18 - 24
- 25 - 34
- 35 - 44

- 45 - 54
- 55 ke atas / 55 or more

Tabiat pembelian fesyen sederhana anda | *Your modest fashion purchasing habits*
 Fesyen sederhana lebih dikenali sebagai fesyen Muslimah walaupun ia tidak terhad kepada sama ada Muslim atau wanita. Bahagian tinjauan ini merangkumi tabiat pembelian fesyen sederhana anda.

Modest fashion is often known as Muslimah fashion though it is not limited to either Muslims or ladies. This survey section covers your buying habits for modest fashion.

iv. Berapa helai barangan fesyen sederhana yang anda beli dalam setahun? | *How many pieces of modest fashion do you buy in a year?*

- Tiada / None
- 1 - 2
- 3 - 6
- 7 - 12
- 13 atau lebih / 13 or more

v. Berapakah jumlah dalam Ringgit Malaysia yang anda belanjakan untuk produk fesyen sederhana dalam setahun? | *How much in Malaysian Ringgit do you spend on modest fashion products in a year?*
 Jika orang lain membeli untuk anda, anggaplah anda yang berbelanja. | *If someone else buys for you, assume it is you spending.*

- Less than RM100
- More than RM100 but less than RM300
- More than RM300 but less than RM600
- More than RM600

Memilih jenama kegemaran anda | *Choosing your favourite brand*

Tinjauan selanjutnya adalah berkenaan jenama fesyen sederhana kegemaran anda, yang dipilih dalam soalan berikut.

The rest of the survey will be about your favourite modest fashion brand, chosen in the following question.

vi. What is your favourite modest fashion brand?
 *

Jika anda mempunyai lebih daripada satu jenama yang digemari, pilih satu. Jika anda tidak dapat memikirkan yang mana digemari, pilih yang paling anda ingat membelinya.

If you have more than one favourite, choose one. If you can't think of a favourite, choose one you most remember buying.

Tentang Jenama Pilihan Anda | *About Your Chosen Brand*

Berikut merupakan satu set pernyataan berkenaan jenama fesyen sederhana kegemaran anda. Sejauh manakah anda bersetuju atau tidak bersetuju dengan pernyataan tersebut? Tiada jawapan yang betul atau salah, jadi pilih sahaja apa yang dirasakan sesuai!

The following is a set of statements involving your favourite modest fashion brand. How much do you agree or disagree with them? There are no right or wrong answers, so just go for what feels right!

(Likert Scale questions)

Z1- Saya akan membeli produk jenama ini walaupun pesaingnya menawarkan kualiti produk dan ciri yang sama pada harga yang lebih rendah. | *I would buy this brand's products even if a competing brand offered the same quality of product and features at a lower price.*

Z2 - Sedikit pengalaman buruk dengan jenama ini tidak akan menghalang saya daripada membeli produk lain dari jenama yang sama pada masa hadapan. | *A few bad experiences with this brand won't stop me from buying other products of the same brand in the future. **

Z3 - Saya akan mengesyorkan jenama ini kepada orang lain yang mencari produk yang serupa. | *I would recommend this brand to others looking for similar products. **

A1 - Nama jenama ini tidak mirip jenama fesyen sederhana yang lain. | *The name of this brand is not similar to other modest fashion brands. **

A2 - Saya boleh membezakan jenama ini daripada pesaingnya melalui logo, pembungkusan atau reka bentuk produk yang jelas. | *I can distinguish the brand from competitors through its clear logos, packaging or product design. **

A3 - Saya melihat nama jenama dahulu sebelum saya mencari harganya. | *I look for the brand name first before I look for the price. **

B1 - Saya rasa jenama ini mempunyai personaliti tersendiri. | *I feel like this brand has a personality of its own.*

B2 - Memakai produk jenama ini menimbulkan perasaan positif tentang diri saya. | *Wearing this brand's products makes me feel positive about myself. **

C1 - Untuk kereta, Volvo bererti "keselamatan". Untuk fesyen sederhana, jenama ini turut bererti suatu nilai positif. | *For cars, Volvo stands for "safety". For modest fashion, this brand also stands for some positive value. **

(Contohnya ia bererti 'keyakinan' atau 'kebebasan' | *For example it may mean 'confidence' or 'freedom'*)

C2 - Saya mahu diberi suara tentang rekaan akan datang yang dibuat oleh jenama ini. | *I want to have a say in what future designs the brand makes. **

C3 - Jenama ini terkenal dengan nilai baik yang lain daripada apa yang dipromosikan. | *This brand is known for other good values than what is promoted.*
*

Sebagai contoh, jenama itu mungkin dikenali sebagai 'sporty' dan mesra belia walaupun hanya dipasarkan sebagai produk berkualiti pada harga berpatutan.

For example, the brand might be known to be sporty and youthful despite only being marketed as affordable quality products.

D1 - Saya akan mengesyorkan sesiapa sahaja yang mempunyai kemahiran dan semangat yang diperlukan untuk bekerja dengan syarikat jenama ini. | *I would recommend anyone with the required skills and passion to work for this brand's company.* *

D2 - Cara pemilik jenama melayan pekerja dan komuniti di sekeliling mereka mempengaruhi keinginan saya untuk membeli produk mereka. | *How the brand's owner treats employees and the community around them affects my desire to purchase their products.*

D3 - Saya telah membeli, atau mungkin mempertimbangkan untuk membeli, sebarang produk bukan fesyen daripada jenama ini. | *I have bought, or may consider buying, any non-fashion products from this brand.*

E1 - Jenama ini memperjuangkan perkara-perkara penting yang berlaku di dunia hari ini. | *This brand champions important things happening in the world today.*

E2 - Jika jenama ini menyokong parti politik, ia berkemungkinan akan menjadi parti yang akan saya undi. | *If this brand endorsed a political party, it is probably going to be a party I would vote for.*

E3 - Jika jenama ini menyokong sebab tertentu, ia bukan sekadar gimik. | *If this brand advocates certain causes, it is not just doing it as a gimmick.*

Terangkan dalam kurang daripada 280 aksara mengapa anda akan terus membeli daripada jenama ini. | *Describe in less than 280 characters why you would continue to buy from this brand.*

APPENDIX 3: APPROVAL PAGE

TITLE OF PROJECT: MEASURING MARKET MATURITY FROM A BRANDING
PERSPECTIVE IN THE MALAYSIAN MODEST FASHION
SECTOR

NAME OF AUTHOR: AHMAD KAMAL BIN ABDOLLAH

The undersigned is pleased to certify that the above candidates have fulfilled the condition of the project paper prepared in the partial fulfilment for the awards of the degree of Master of Business Administration.

SUPERVISOR

Signature : _____

Name :

Date :

ENDORSED BY

Dean

Graduate School of Business

Date:

