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**DEPARTMENT OF GARMENT ENGINEERING**

**THESIS TITLE: STUDY ON CONSUMER PERCEPTION, ATTITUDE, AND  
PATRONAGE TOWARD BUYING LOCALLY VS IMPORTED GARMENT [ CASE  
STUDY IN ADDIS ABABA CITY]**

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**May, 2025**

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IN GARMENT ENGINEERING

UNDER THE SUPERVISION OF

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**Wolkite, Ethiopia**

**May, 2025**

## DECLARATION

We, hereby declare that the thesis is submitted in fulfillment of the Bachelor degree is our work and that all contributions from any other persons or sources are properly and duly cited. We further declare that the material has not been submitted either in whole or in part, for a degree at this or any other university. In making this declaration, we understand and acknowledge any breaches in this declaration constitute academic misconduct, which may result in our expulsion from the program and/or exclusion from the award of the degree.

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## **ADVISOR APPROVAL SHEET**

This is to certify that the thesis entitled “STUDY ON CONSUMER PERCEPTION, ATTITUDE, AND PATRONAGE TOWARD BUYING LOCALLY VS IMPORTED GARMENT” submitted in Partial Fulfillment of the Requirements for the Degree of Bachelor of Science in Garment Engineering, the undergraduate Study Program of the Garment Engineering and Technology, and has been carried out by Shegaw W/Gebriel, Bamlak seifu and Temesgen sewunet, under my supervision. Therefore, I recommend that the student has fulfilled the requirements and hence here by can submit the thesis to the Institute.

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Advisor name

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Signature

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## ABSTRACT

*The purpose of this study was to analyze consumer perception, attitude and patronage towards purchasing locally produced and imported apparel in Addis Ababa city. The objectives of the Study were: To analyses consumers' perception on locally produced garments compared to imported ones; To examine consumer attitudes toward supporting local industries versus purchasing imported products; To evaluate the level of patronage for locally manufactured garments compared to imported ones among different consumer segments and to provide recommendations for local manufacturers to compete effectively with imported garment brands in Addis Ababa city. A questionnaire was used to collect the primary data. The sampling procedure was purposive sampling. From, sample size of 104 respondents was selected. The collected data was analyzed using package for social science 25. The study findings concluded that there is significant difference in the perception of consumers in Addis Ababa towards locally produced and imported apparel. According to the findings both locally produced apparel and imported clothing are perceived in different standards. The findings showed that consumer attitudes toward locally produced versus foreign apparel differed significantly. Consumers had an overall more positive attitude towards foreign apparel over domestic made apparel with regard to quality, fashionableness, brand name, and choice of styles. However, no significant difference was found in consumer attitudes among various demographics, namely gender, age and purchase frequency. From the study, the following recommendations were made: Local manufacturers should prioritize enhancing the quality, durability, and fashionability of their garments to compete with imported products; Investing in branding and marketing campaigns can help local manufacturers build recognition and trust; Improving supply chains and ensuring wider availability of locally made garments in retail spaces can make them more accessible to consumers; Emphasizing the cultural relevance of local garments and promoting ethical production practices can differentiate them from imported alternatives and appeal to socially conscious consumers; Initiatives to educate consumers about the benefits of supporting local industries, such as job creation and economic growth, can foster a stronger preference for home-made garments; Offering unique designs and customizable options can cater to consumers seeking individuality and better fit, particularly in segments like casual and formal wear.*

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## LIST OF ACRONYMS

CC:.....	Conspicuous Consumption
CE: .....	Consumer Ethnocentrism
CETSCALE: .....	Consumer Ethnocentric Tendencies Scale
COO: .....	Country of Origin
NCIC: .....	National Cohesion and Integration Commission
PSC: .....	Public Service Commission
SPSS: .....	Statistical Package for Social Sciences
ETIDI:.....	Ethiopian textiles industry development institute

# CHAPTER ONE

## INTRODUCTION

### 1.1 Background of the study

The garment industry is a significant contributor to the global economy, with both locally produced and imported garments vying for consumer attention. In Ethiopia, the textile and garment sector has been identified as a priority area for economic development, with the government implementing policies to support local manufacturing (ETIDI, 2016). Despite these efforts, imported garments continue to dominate the market, particularly in urban centers like Addis Ababa. This trend raises important questions about consumer preferences, perceptions of quality, and attitudes toward local versus imported products. Understanding these dynamics is crucial for policymakers, manufacturers, and marketers aiming to enhance the competitiveness of locally produced garments.

According to (Ferguson et al., 2008), showed that products from the technologically more advanced countries were viewed more positively by nationals of developing countries than those from the technologically less advanced countries. As a result, marketing professionals are increasingly required to comprehend the factors that influence customers' assessment of imported clothing relative to locally made clothing in cross-cultural and cross-national contexts (Bhaskaran, 2007). In order to ascertain consumer perception, attitude, and patronage in relation to clothing selection, the current study concentrated on the Ethiopian garment business.

This topic was chosen because of the prevalent "made in" perception of imported goods compared to locally made clothing, which has resulted in certain local goods being classified as imported (Saffu K. , 2006). Despite this background, no study has been conducted to determine consumer perception, attitude and patronage towards domestic versus imported apparel in Ethiopia. This study attempts to examine the dynamics between perception, attitude, and patronage in terms of buying domestically produced versus foreign-produced garments in Addis Ababa. In examining these determinants, the study aims to provide insights to formulate marketing strategies, policy decisions, and improving quality for local manufacturers to be able to help expand Ethiopia's garment industry.

## **1.2 Statement of the Problem**

There are many local garment manufacturers in Ethiopia those manufacturers' produces different types of garment for local market but there is no enough and sustainable local market share. Ethiopia's apparel industry has suffered due to the increase in imported clothing, which has reduced demand for locally made clothing. According to our preliminary study, conducted by a questionnaire submitted to clothing retailers and observation in Addis Ababa, there is very high market imbalance. The study findings show that mainly available garment products in Addis Ababa city garment shops were Chinese (25%) and Turkish (18.75%). The major garment products available in Addis Ababa garment shops were Jeans trouser (31.25%) and T-Shirt (25%). In addition, Jacket, Sweater and others are also available with a percentage of 18.75, 18.75 and 6.25 respectively. Imported garments dominate the market with very sustainable market share, while those produced locally are lagging behind. In addition, the results show that the dominant garment products sold in Addis Ababa garment stores are jeans trousers, and these are dominated by imported goods.

Most of the existing research provides a broad description of consumer choice but does not delve deeper in the consumers perception, attitude and patronage level on both local and imported garments. There is a lack of empirical research on how consumers in Addis Ababa perceive and make purchasing decisions between locally made and imported garments. This lack creates a question as to why foreign products dominate the market while domestic ones do not gain traction. Without a clear understanding of these factors, local manufacturers may struggle to align their offerings with consumer expectations, potentially leading to reduced market share and economic losses. This study aims to address this gap by investigating consumer perception, attitude, and patronage towards imported and locally-produced garment products in Addis Ababa city.

## **1.3 Objectives**

### **1.3.1. General objective**

To study consumer perception, attitude, and patronage toward locally manufactured versus imported garment products in Addis Ababa city, with a focus on understanding the market imbalance and identifying strategies to improve the competitiveness of locally produced garments.

### **1.3.2 Specific objectives**

- To analyse consumers' perception on locally produced garments compared to imported ones.
- To examine consumer attitudes toward supporting local industries versus purchasing imported products.
- To evaluate the level of patronage for locally manufactured garments compared to imported ones among different consumer segments.
- To provide recommendations for local manufacturers to compete effectively with imported garment brands in Addis Ababa city.

### **1.4 Research Questions**

- How do consumers perceive the clothing attributes of locally produced garments compared to imported ones?
- What attitudes do consumers hold toward supporting local garment industries versus purchasing imported products?
- How do consumer satisfaction and loyalty levels compare between local and imported garment brands?
- What strategies can local manufacturers adopt to compete effectively with imported garment brands?

### **1.5 Significance of the study**

This study will contribute to the body of knowledge on consumer behavior in developing economies, particularly in the context of the garment industry. Investigating customer perceptions, attitudes, and patronage about the purchasing of both domestic and imported clothing is the primary goal of this study. The findings will be valuable for local manufacturers, policymakers, and marketers seeking to promote locally made products and reduce reliance on imports. By understanding the factors that influence consumer perceptions, attitudes, and patronage, stakeholders can develop strategies to enhance the appeal of locally produced garments and foster economic growth.

## **1.6. Scope of the Study**

This research focuses on understanding consumer behavior and decision-making processes when choosing between locally produced and imported garments in Addis Ababa for both indigenous and imported clothing products. The scope of the study includes, evaluating how consumers perceive the quality, durability, and design of locally produced garments compared to imported ones, Exploring the role of cultural, economic, and social factors in shaping consumer preferences; Assessing the influence of factors such as brand image, country of origin, and sustainability on consumer perceptions; Analyzing consumer attitudes toward supporting local industries versus purchasing imported products; Identifying the key factors (e.g., price, quality, availability, and trends) that influence consumers' choice between local and imported garments; Investigating the extent to which patriotism, ethical considerations, or global trends impact purchasing decisions.

Examining differences in preferences and attitudes across demographic segments, such as age, gender, income level, and geographic location; Identifying strategies for local manufacturers to enhance their competitiveness against imported brands; Conducting a comparative analysis of consumer satisfaction and loyalty toward local versus imported garment brands. Due to the financial constraints, the study is also limited geographically in selected few market areas like Megenagna and Bole (22) areas in Addis Ababa city. The reason for selecting these two market areas is, Megenagna and Bole (22) areas are the busiest trade areas in the Addis Ababa where people usually prefer going there to buy both domestically produced and imported garments. And also, there are many garment retailers found there, there is high chance of getting large number of respondents who have experience of buying both domestic and imported garments.

## **1.7 Organization of the Study**

This study has five chapters. The first chapter is about the introduction part which have background information, statement of the problem, objectives, significance, scope and limitation of the study. The second chapter has the literature review part while the third chapter is about research design and methodology. The fourth chapter includes the data analysis, presentation and interpretation part of the study. Finally, the fifth chapter is about conclusion and recommendation of the study.

# **CHAPTER TWO**

## **LITERATURE REVIEW**

### **2.1 Introduction**

This chapter discusses the following topics in relation to consumer perception, attitude and patronage towards purchase of imported versus locally-produced garments; consumer buying behavior, consumer perception, consumer attitude, consumer ethnocentrism, consumer patronage, conspicuous consumption, Attributes affecting consumer buying decision and country of origin.

### **2.2 Consumer Buying Behavior**

Various academics define the term "consumer." According (Kotler P. , 2012) consumers as the product's final user or as someone who purchases a product for their own use, whether or not they intend to sell or resell it. Consumer purchasing behavior is most strongly influenced by the uniqueness of fashion elements including media reviews, celebrity endorsements, and designer brands. Consumer buying behaviour is the sum total of a consumer's attitudes, preferences, intentions, and decisions regarding the consumer's behaviour in the marketplace when purchasing a product or service.

### **2.3 Consumer Perception towards Apparel Products**

Perception, according to (Kotler P. , 2008), is the process by which a person receives, chooses, arranges, and interprets information. Consumer perception refers to how individuals interpret and make sense of products based on their quality, price, design, and brand image. Studies have shown that consumers often associate imported goods with higher quality and prestige, while local products may be perceived as inferior (Smith, 2020). This perception can significantly influence purchasing decisions. According to (Kotler P. W., 2005), influence from others is another important aspect that influences customers' decision-making. Customers typically seek advice and counsel one another while considering a new brand or product. Advertisement also influences consumers' purchasing decisions. Advertisement is a conspicuous form of communication. Customer satisfaction is also another key factor in modern marketing. If the customers are satisfied with the provided goods, the probability that they would buy the goods again increases (Saffu & Walker, 2006).

## **2.4 Consumer Attitude towards Apparel Products**

Many regions of the world have acknowledged the issue of attitudes toward local or non-local items as a major economic concern in the marketplaces for consumer behavior. Attitude toward a product is shaped by beliefs, feelings, and behavioral intentions. Research indicates that consumer attitudes toward locally made products are influenced by factors such as patriotism, environmental concerns, and economic considerations (Jones, Smith, & Brown, 2019). Understanding these attitudes is crucial for developing effective marketing strategies. (Assael, Reed, & Patton, 2004), said that attitude play an important role to identify market segments, development of new products, in formulation & evaluation of promotional strategies. A person's attitude is a product of their learning processes and is impacted by their marketing approach, friends, family, and personal experiences, (Wang & Heitmeyer, 2006). Depending on the learnt outcome, a person may grow to like it or dislike it. According to (Solomon M. , 2008), attitudes exist because they fulfill a purpose for the individual and are influenced by their underlying motivations.

Four main purposes of attitude are as follows: The first is "utilitarian function," which refers to opinions on a thing depending on whether it causes pleasure or suffering. Another is the value-expressive function, which refers to the attitudes that a person develops as a result of the product's portrayal of them. The third is the "ego-defensive function," which refers to the attitudes that an individual develops to defend themselves against threats from the outside world or from their own emotions. The final one is "Knowledge function," which refers to the attitudes that a person develops as a result of necessity, structure, or significance.

## **2.5 Consumer Ethnocentrism Concept**

"The view of things in which one's group is the center of everything, and others are scaled and rated with reference to it," is how Sumner defines ethnocentrism. Every community feeds its own conceit and ego, exalts its own deities, brags of superiority, and treats outsiders with disdain. The term "consumer ethnocentrism" (CE) describes the tendency of consumers to choose native goods over imports (Shankarmahesh, 2006). Customers with strong ethnocentric inclinations are likely most likely to make biased decisions because they are more likely to value locally produced goods and downplay the benefits of imported goods.

### **2.5.1 Perspective of ethnocentric consumers**

Ethnocentrist consumers believe that buying imports is wrong because it is not only unethical and unpatriotic, but it also hurts the home economy and causes employment to be lost in industries that imports threaten. Furthermore, persons who are very ethnocentric tend to be proud of their own values, symbols, and people and see domestic goods as more prideful and distinctive than those from other nations (Kinra, 2006). According to (O'Cass, 2002), the more ethnocentric a country is, the less positive its consumers' sentiments are and the less probable it is that they will have preferences for and intentions to buy foreign goods. Ethnocentric customers are better able to articulate their good intents toward indigenous items than their negative intentions against imported ones. According to research by (Balabanis G. & Diamantopoulos., 2004), People that are ethnocentric have a very positive outlook on their own nation.

## **2.6 Consumer Patronage of Apparel products**

Consumer patronage is the tendency of consumers to repeatedly purchase from a specific brand or store due to satisfaction, trust, or emotional attachment (Kotler P. ..., 2016). According to (Klien & Ettenson., 2006), customers may be prompted to choose between product quality and patriotic sentiments due to the often-poor quality of domestic goods in developing and transitional economies. Patronage is defined as "a strong feeling of attachment and loyalty to one's own country without corresponding hostility towards other nations" by (Balabanis G. , DIAmantopouios, Mueller., & Melewar, 2001). Factors such as price sensitivity, brand loyalty, and availability play a significant role in determining consumer patronage (Kim & Lee., 2021). In the context of Addis Ababa, these factors may vary based on socio-economic status and cultural influences.

### **2.6.1 Consumers' patriotic emotions**

(Sharma, 2020) claimed that consumer ethnocentrism carries the notion of consumers' patriotic emotions and is high when a consumer is emotionally invested in acquiring imported products. However, consumers' familiarity with a nation's products may lessen the aforementioned function of consumer patriotism. In particular, customers who are unfamiliar with the nation's products may be more influenced by consumer patriotism than those who are, as the latter may lack the experience or information necessary to calculate the financial ramifications of forgoing a foreign product. As previously mentioned, (Lai, 2017) developed his attitude model based on the fundamental premise that in order to better understand human behavior, the measure of attitudes

should not be oriented toward evaluating attitude toward objects, people, or institutions themselves. , (Lai, 2017) explained that an individual's attitude toward performing a behavior is determined by two major components: the strength of the beliefs held about the objects and the individual's subjective evaluation of those beliefs. Additionally, the Fishbein theory operates under the assumption that people are generally quite rational and make systematic use of the information at their disposal.

## **2.7 Local vs. Imported Garments**

In developing countries, imported garments often dominate the market due to perceived superior quality and variety. However, local garments are gaining traction due to affordability and government support for local industries (Abebe, 2022).

## **2.8 Attributes affecting consumer buying decision**

(Huang & Lee, 2020) classified 12 attributes that associated with the overall attitudes when purchasing imported and domestic apparel products, namely: good fit, durability, ease of care, good price, comfort, quality, choice of colour, attractiveness, fashionableness, brand name, appropriateness for occasion, and choice of styles. The apparel attributes examined include care instruction, brand name, quality, fiber content, comfort, color, attractiveness, fashionableness, good fit, good price, ease of care, suitability, and appropriate for occasion. (Connell & Presley, A., 2005) agree on four main theories for buying fashion. The first one is ‘Modesty Theory’ which suggests that a person wears clothes to cover private parts of the body. Another one is the ‘Immodesty Theory’ which explains that the reason for clothes is to draw attention to parts of the body. The third one is the ‘Protection Theory’ which posits that the purpose of wearing clothes is to protect the wearer from elements such as insects and weather. And finally, the ‘Adornment Theory’ which suggests that clothing is an aesthetic expression and personal decoration that influences a person’s identity and raises the self-esteem (Solomon M. R. & Rabolt,, 2009).

When purchasing apparel products, price, care requirements, brand, product composition such as style and color, store image, and advertising image are important considerations influencing consumers when purchasing clothing items (North & De Vos,, 2003). (Van Weel, 2005), notes that consumers would appreciated the basic combination of price and quality, however with new trends a demand for individuality and taste is increasing. The consumers are demanding for unique products that are designed for their particular need. These attributes were used to determine the

Ethiopian consumers' perception, attitude and patronage towards imported versus locally produced apparel in Ethiopia.

## **2.9 Conspicuous Consumption of Apparel Products**

Conspicuous Consumption (CC) refers to consumers' desire to provide prominent visible evidence of their ability to afford luxury goods (Wang & Chen, 2004). Conspicuous consumers may be driven more by the social than by the economic or physiological value of goods, as they seek to impress others by demonstrating their willingness to pay a premium for prestige. CC can be found in all social and income groups from the richest to poorest. Given that consumers' evaluation of quality of domestic or imported products influences their purchase preferences, the impact of ethnocentrism on willingness to buy is different between developing and developed countries. This discrepancy is more pronounced when the import is related to conspicuous consumption such as apparel, as consumers in developing countries of which Ethiopia is one, often regard foreign products as status.

### **2.10 Country of Origin Phenomenon**

The concept of Country-of-Origin (COO) is one element thought to affect how consumers view, assess, and intend to buy clothing products. The "country-of-origin effect" refers to the assessment of a product based on the nation of origin. As an information cue, the nation of origin (where the product is made) activates a variety of ethnocentric and/or non-ethnocentric attitudes as well as customers' prior knowledge, which in turn influences how they understand and assess the product's features (Chryssochoidis & Krystallis, A.,, 2007). There are several different definitions and conceptualizations of COO effects, which have demonstrated strong influence on product evaluations.

## 2.11 Literature gap

Author	Previous finding	Our finding	Comparison	
			Previous	Our
Dejene, W (2017)	The factors that influence consumers purchasing decision of domestic leather shoes.	Study on consumer perception, attitude, and patronage toward locally manufactured versus imported garment products in Addis Ababa city.	study was conducted in purchasing decision of domestic leathers.	The paper done on buying behavior of imported vs domestic garments.
Abubeker, A (2022)	Factors affecting consumer preference of domestic garments	study consumer perception, attitude, and patronage toward locally manufactured versus imported garment products in Addis Ababa city.	The study done solely on domestically produced t-shirts, and Shirts	The study done solely on domestically produced

Aytso,C (2016)	analyze consumer perception, attitude and patronage towards the purchase of locally-produced and imported apparel among public servants in Kenya.	study consumer perception, attitude, and patronage toward locally manufactured versus imported garment products in Addis Ababa city.	It focused only on employees of the central government from 18 government ministries within Nairobi County.	It focused on all types of consumers found in selected area of Addis Ababa city
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# CHAPTER THREE

## METHODOLOGY

### 3.1 Research Design

This study adopted a survey design which involves an inquiry on information gathering from a selected sample through a questionnaire. This technique is often undertaken to learn about people's knowledge, beliefs and preferences, and assess the views of a general population (Kotler P. , 2008). This design was chosen as it best fits the nature and purpose of this study. With its strong statistical analysis capability high reliability, the researcher was able to make inferences from the large population for the study.

### 3.2. Measurement of Variables

Table 3. 1 Independent and Dependent Variable

Independent Variable	Dependent Variable
Consumer perception	Clothing attributes
Consumer Attitude	behavior, feelings, knowledge,
Consumer Patronage	Feelings, behavior

### 3.2 Target Population

The target population of this study is consumers found in Addis Ababa, capital city of Ethiopia. Furthermore, the consumers are those who found in the two market areas of Addis Ababa which are Megenagna and Bole (22) garment selling areas. The target population includes male and female consumers aged 18 and above who purchase garments in Addis Ababa.

### 3.3 Sampling Technique

Based on the literature, there are two main sampling methods, probability and non-probability sampling. In this study, the researcher used non-probability sampling techniques called purposive

sampling technique was used. Purposive sampling is a sampling technique that allows a researcher to use cases that have the required information with respect to the objectives of his or her study. Purposive sampling was chosen to ensure that the selected individuals possess firsthand experience and knowledge regarding garment purchasing decisions, both local and imported.

### **3.4 Sample Size**

A total of 104 participants were selected using purposive sampling. This sample size was determined based on the need for adequate representation across key demographic and behavioral variables (such as income level, gender, and garment purchasing frequency), while also ensuring feasibility in terms of data collection and analysis. The sample size is deemed sufficient to generate meaningful insights for the study's qualitative and/or descriptive quantitative objectives.

### **3.5 Data collection**

#### **3.5.1 Primary Data collection:**

The primary sources of data for our study include; observation, consumers of garments products in Addis Ababa city and for our preliminary study was garment shop retailer. Consumers of garments which are available at the time of study at the selected garment shops were taken as a sample for the primary data sources the data collected through survey questionnaire.

#### **3.5.2 Secondary data**

The main sources of secondary data for this study are internet used only to support as a reference to start the study in identifying the prevailing problem. Based on the data, the statement of the problem and research questions for this particular study was developed.

### **3.6 Research Instruments**

The primary data was collected by use of a questionnaire. The questionnaire consisted of a series of questions for the purpose of gathering information from respondents. According to Kombo and Tromp (2009), questionnaires are easy to use and provide a uniform and standardized manner of asking questions to respondents. They also provide a platform for recording and making reference during the process of analyzing information.

The questionnaire comprised of six main sections namely:

Section 1: Demographic Information

Section 2: General Clothing Purchasing Behavior

Section 3: Perception of Home-Made Garments

Section 4: Perception of Imported Garments

Section 5: Attitude and Patronage

Section 6: Comparative Assessment

The questionnaire opened with the introduction of the research and stated confidentiality and anonymity of the respondents. The instructions on how to answer the questions were provided at the beginning of every section.

### **3.7 Data Analysis**

Collected data were analyzed using Statistic Package for Social Science (SPSS) as the main statistical package. This helps to draw conclusions using inferential statistics and measures of dispersion. And also, to find out whether there was variation in the attributes that consumers considered when selecting apparel, to test the differences between perception of consumers, factors that influenced the perception and consumer attitude towards imported and domestic apparel, to test the effect of consumer attitude and patronage on purchase of imported or domestic apparel. The data collected was presented using tables, percentages and text.

## CHAPTER FOUR

### RESULTS AND DISCUSSION

#### 4.1 Introduction

This chapter presents the findings of the study with respect to the following objectives: to analyse consumers' perception on locally produced garments compared to imported ones; to examine consumer attitudes toward supporting local industries versus purchasing imported products to evaluate the level of patronage for locally manufactured garments compared to imported ones among different consumer segments; and provide recommendations for local manufacturers to compete effectively with imported garment brands in Addis Ababa city. The descriptive analysis made use of tools such as mean, percentages and standard deviation.

#### 4.2. Characteristics of Sample Respondents

This section analyses the key characteristics of the respondents and seeks to establish gender, age, income and employment status characteristics.

##### 4.2.1 Gender of the Respondents

The gender breakdown for the sample comprised of 54.8 percent male and 45.2 percent female. The distribution was therefore, almost equally balanced.

Table 4. 1 Gender of the respondents

Gender		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Male	57	54.8	54.8	54.8
	Female	47	45.2	45.2	100.0
	Total	104	100.0	100.0	

#### 4.2.2 Age group of the Respondents

Table 4. 2 Age of respondents

Age		Frequency	Percentage (%)
Valid	18-24 years	21	20.2
	25-34 years	30	28.8
	35-44 years	31	29.8
	45-54 years	13	12.5
	55+ years	9	8.7
	Total	104	100.0

The results in Table 4.2 Show that, the group 18-24 years represented 20.2 percent of the sample. Those between 25-34 years represented 28.8 percent, 35-44 years old constituted 29.8 percent, 45-54 years represented 12.5 percent and above 55 years constituted 8.7 percent.

#### 4.2.3 Employment status of the Respondents

Table 4. 3 Employment of the respondents

Employment		Frequency	Percentage (%)
Valid	Employed full-time	31	29.8
	Employed part-time	16	15.4
	Student	16	15.4
	Self-employed	36	34.6
	Unemployed	5	4.8
	Total	104	100.0

Table 4.3 presents findings with regards to the employment status of the respondents. Majority of the respondents were self-employed,34.6 percent, while 29.8 percent of the respondents were employed full-time followed by 15.4% of the respondents of both employed part-time and student

while the remaining respondents were unemployed,4.8%. This composition of respondents' employment status helped to see the response of almost all kinds of consumers.

#### 4.2.4 Estimated Monthly Income

Table 4. 4 Monthly income of respondents

Income (ETB)		Frequency	Percentage (%)
Valid	Below 5000	12	11.5
	5001 –10,000	24	23.1
	10,001–20,000	32	30.8
	20,001–30,000	29	27.9
	Above 30,000	7	6.7
	Total	104	100.0

According to the results in Table 4.4 the highest number of respondents earned ETB 10,001-20,000(30.8%). This was followed by those who earned ETB 20,001-30,000(27.9%), and the least were those who earned ETB Above 30,000 (6.7%).

### 4.3. General Clothing Purchasing Behavior

#### 4.3.5 Frequency of purchasing

Table 4. 5 Purchasing frequency of respondents

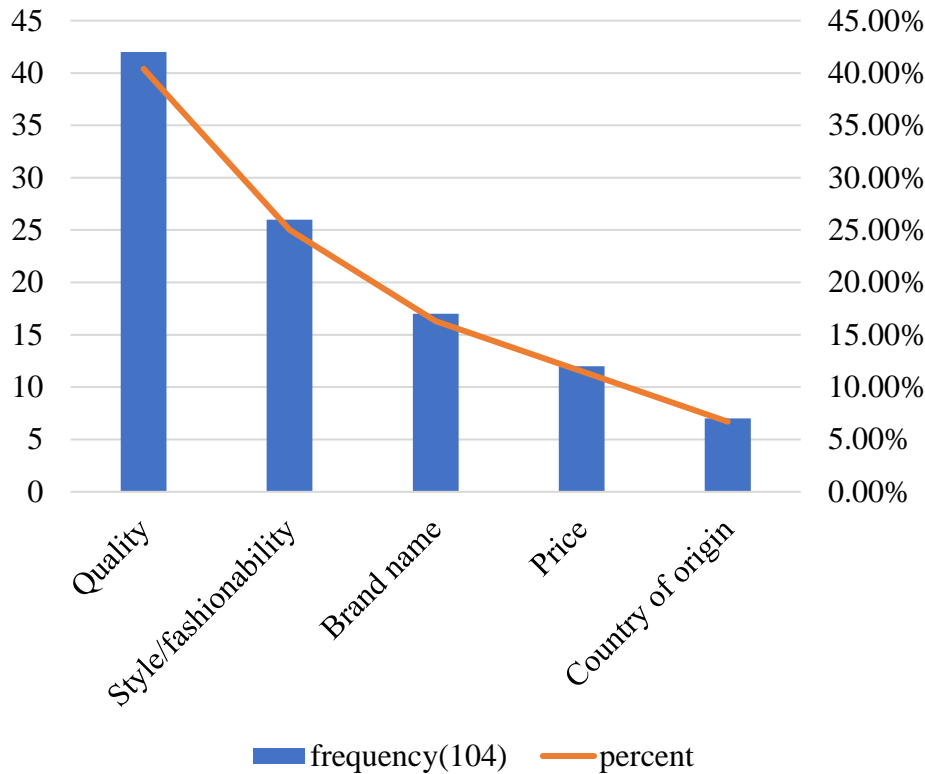
Purchasing frequency		Frequency	Percentage (%)
Valid	Weekly	1	1.0
	Monthly	4	3.8
	Every 2-3 months	49	47.1
	Every 6 months	40	38.5
	Yearly or less often	10	9.6
	Total	104	100.0

Regarding purchasing frequency (Table 4.5), majority of respondents, 49 (47.1%), responded that they shopped every 2-3 months, 40 (38.5%) shopped every 6 months, 10 (9.6%) yearly or less

often, 4 (3.8%) monthly, and also 1 (1%) weekly. Most consumers bought clothes every 2-3 months rather than weekly or monthly.

### 4.3.1 Factors Influencing Clothing Purchases

figure 4. 1 Ranking of Factors Influencing Clothing Purchases



Based on the results in figure 4.1, the top factor for consumers when choosing a product was quality, with 40.40% of respondents ranked it as their top priority. Style/fashionability was the second most important factor, with 25.00% of respondents ranked it as their top choice. Brand name ranked in third, with 16.30% of respondents. Price and country of origin were the least important factor ranked in fourth and fifth, with 11.50% and 6.70% of respondents respectively. This suggests that while quality is the top concern, fashion trends and brand reputation also play significant roles. The low ranking of country of origin implies that consumers do not strongly favor imported goods simply because they are foreign instead, they evaluate based on perceived value. From these results it was clear that most consumers considered quality as the most important attribute when purchasing apparel.

### 4.3.2 Primary sources of information

Table 4. 6 source of information of respondents

Source of information	Responses		Percent of Cases
	N	Percent	
Online reviews	74	23.10%	71.20%
In store displays and staff	68	21.20%	65.40%
Friends/family	63	19.60%	60.60%
Advertising (TV, print, online)	60	18.70%	57.70%
Social media influencers	32	10.00%	30.80%
Fashion magazines	24	7.50%	23.10%
Total	321	100.00%	308.70%

According to the results in table 4.7, the most common source of information for consumers when evaluating clothing products was online reviews, with 23.1% of respondents cited this as their primary source. In store displays and staff were the second-most frequent origin of information, with 21.2% of respondents cited this as their primary source. Friends/family were the third source of information, with 19.6% of respondents cited this as their primary source. Advertising and social media influencers were the fourth and fifth primary source of information, with 18.7% and 10.0% of respondents cited this as their primary source respectively. Fashion magazines were the least common source of information, with 7.5% of respondents cited this as their primary source.

## 4.4 Perception of Home-Made Garments

### 4.4.1 perception of clothing attributes for local garments

Table 4. 7 respondents view of clothing attributes

Clothing attribute	N	Mean	Std. Deviation
Price value	104	3.3	1.276
Durability	104	2.16	1.247
Style/fashionability	104	1.92	0.867
Availability	104	1.87	0.956
Quality	104	1.69	0.764
Valid N (listwise)	104		

To determine the perception of home-made garments based on clothing attributes, table4.7 provided the results, which indicated that local products had better price value (mean = 3.30) followed by durability (mean = 2.16) and Style/fashionability (mean = 1.92) and also home-made garments had poor quality and availability. This shows that while local products are seen as affordable, quality and accessibility remain concerns.

#### 4.4.2 The main advantages associated with home-made garments

Table 4. 8 Advantages associated with home-made garments

Advantage	Responses		Percent of Cases
	N	Percent	
Cultural significance	79	22.20%	76.00%
Unique designs	71	19.90%	68.30%
Supporting local economy	65	18.30%	62.50%
Better fit for local body types	64	18.00%	61.50%
Other	60	16.90%	57.70%
Better quality	17	4.80%	16.30%
Total	356	100.00%	342.30%

According to results in table 4.9, the top advantage of home-made garments, with 22.2% of respondents was cultural significance. This was cited most frequently, suggesting consumers strongly value the cultural connection local clothing provides. Unique designs were the second most popular response, with 19.9% of respondents indicating consumers appreciate distinctive local styles.; Supporting local economy the third, with 18.3% of respondents this shows that economic benefits to the community rank third among advantages; better fit for local body types and better quality were least advantages, with 18.0% and 4.8% of respondents respectively.

#### 4.4.3 The main disadvantages associated with home-made garments

Table 4. 9 Disadvantages associated with home-made garments

Disadvantage	Responses		Percent of Cases
	N	Percent	
Lack of brand recognition	96	23.10%	92.30%
Lower quality	93	22.40%	89.40%
Poor availability	88	21.20%	84.60%
Other	61	14.70%	58.70%
Limited style options	51	12.30%	49.00%
Higher prices	27	6.50%	26.00%
Total	416	100.00%	400.00%

Based on results shown in table 4.9, lack of brand recognition, with 92.3% of respondents associated as the main disadvantage of home-made garments. Lower quality, the second disadvantage, with 89.4% of respondents; poor availability the third, with 18.3% of respondents. Accessibility appears to be a significant barrier for home-made clothing and Price was the least cited concern among major disadvantages. 61(58.70%) of respondents mentioned additional disadvantages such as uneven stitching, loose threads, or inferior seam quality. Findings shows that branding, quality control, and distribution as critical challenges for local manufacturers.

## 4.5. Perception of imported Garments

### 4.5.1 Rate of clothing attributes

Table 4. 10 Rate of clothing attributes for imported garments

Attribute	N	Mean	Std. Deviation
Style/Fashionability	104	4.23	0.74
Quality	104	4.19	1.025
Availability	104	3.96	1.033
Durability	104	3.88	1.046
Price value	104	2.65	1.139
Valid N (listwise)	104		

Table 4.10 provided the results, which indicated that imported products had better fashionability (mean = 4.23) followed by quality (mean = 4.19) and availability (mean = 3.96) and also imported garments had least advantage on durability and Price value. Consumers strongly associate imported garments with trendy, fashionable designs. This indicates that imported garments are perceived as superior in design, quality, and accessibility, but less affordable.

### 4.5.2 The main advantages associated with imported garments.

Table 4. 11 Advantages of imported garments

Advantage	Responses		Percent of Cases
	N	Percent	
More fashionable	78	16.8%	75.0%
Better quality	97	21.0%	93.3%
Lower prices	7	1.5%	6.7%
Brand recognition	92	19.9%	88.5%
Greater variety	97	21.0%	93.3%
Other	92	19.9%	88.5%

Total	463	100.0%	445.2%
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Table 4.11, results indicated that 21.0% of respondents believed that imported garments have better quality and also 21.0%, 19.9% and 16.8%, of respondents believed that imported garments have greater variety, brand recognition and more fashionable respectively.

#### 4.5.3 The main disadvantages associated with imported garments.

Table 4. 12 Disadvantages of imported garments

Disadvantages	Frequency(n=104)	Rank
Lack of cultural relevance	90	1
Not supporting local economy	85	2
Environmental concerns	84	3
Poor fit for local body types	29	4
Questionable labor practices	3	5

According to Table 4.12 the perception of imported garments was lack of cultural relevance followed by not supporting local economy, while environmental concerns was ranked third. Poor fit for local body types was fourth, followed by questionable labor practices in fifth. This indicates that imported garments are preferred for style and quality, ethical and cultural disconnects remain issues.

#### 4.6 Consumers Attitude and Patronage

##### 4.6.1 Percentage of Wardrobe Consisting of Home-Made Garments

Table 4. 13 percentage of home-made garments

Percentage Range		Frequency(n=104)	Percentage (%)
Valid	0-20%	22	21.2
	21-40%	44	42.3
	41-60%	21	20.2
	61-80%	15	14.4

	81-100%	2	1.9
	Total	104	100.0

According to results in table 4.13 shown that 44 (42.3%) of respondents had between 21% and 40% of their wardrobes made from home- made garments; 22 (21.2%) had between 0% and 20%, while 21(20.2%) had 41% – 60%. Few people had over 60% of home-made garments, and only 1.9% of respondents had 81 – 100% of homemade. This result shows that low dominance of home-made clothing.

#### **4.6.2 Circumstances for purchasing home-made (local) garments.**

Table 4. 14 Circumstances

Circumstance	Frequency(n=104)	Percentage (%)
When quality is visibly better	99	95.20%
Special occasions	87	83.70%
When supporting local causes	19	18.30%
Other	14	13.50%
When price is comparable to imports	13	12.50%
Everyday wear	10	9.60%

Table 4.14 show that 99 (95.2%) of respondents stated that they were more likely to purchase home-made garments when the quality was visibly better followed by special occasions, with 87(83.7%) of respondents; supporting local causes, with 19(18.3%) of respondents and also everyday wear and other circumstances were less likely to purchase home-made garments.

#### **4.6.3 Willingness to pay for home-made (local) garments**

Figure 4. 2 Respondents willingness to pay if home-made garments were comparable quality to imports

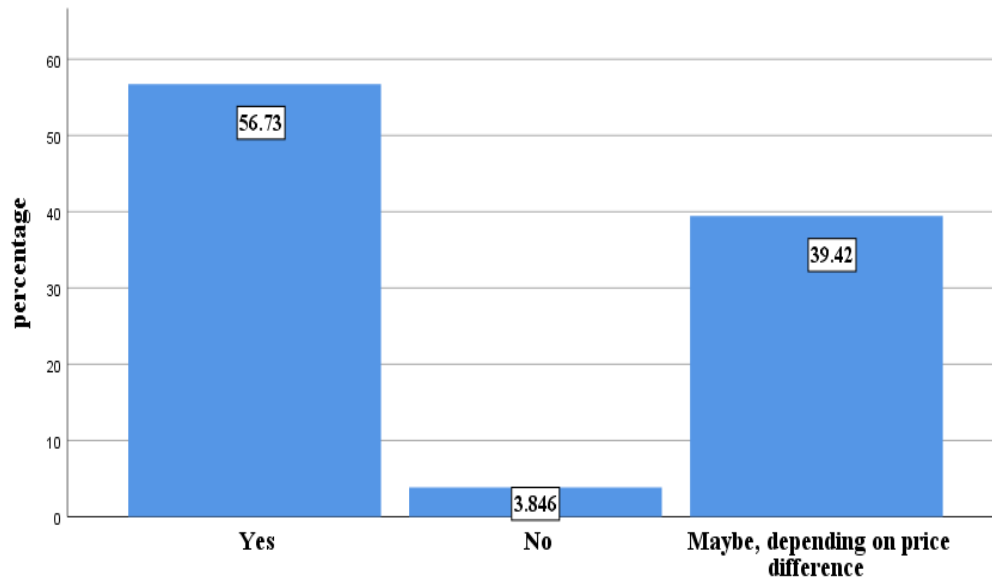


Figure 4.2 of findings shows that 56.73% (59 respondents) said “Yes”, over half of the respondents were willing to pay premium prices for quality-equivalent local products; 39.42% (41 respondents) said “Maybe, depending on price difference” and also 3.8% (4 respondents) said “No”.

#### 4.6.4 Concerning distribution of consumer advocacy for locally made garments

Table 4. 15 Respondents advocacy

Response category		Frequency	Percentage (%)
Valid	Extremely unlikely	14	13.5
	Unlikely	37	35.6
	Neutral	31	29.8
	Likely	11	10.6
	Extremely likely	11	10.6
	Total	104	100.0

Table 4.15 illustrates the frequency distribution and percentage of how the respondents recommended home-made garments to friends/family. 37(35.6%) of the respondents indicated that they recommended unlikely, 31(29.8%) of respondents were neutral; 14(13.5 %) were extremely unlikely and only 11(10.6%) of respondents were likely; with 11(10.6%) extremely likely. Only 21.2% actively recommend local garments, while 49.1% are unlikely to do so.

#### **4.6.5 views on how to increase purchases of home-made garments.**

Table 4. 16 Opinion on how to make of home-made garments better

Opinions	N	Mean	Std. Deviation
Work on Marketing	104	3.05	1.424
Provide good quality apparel	104	3.00	1.337
Awareness	104	2.84	1.352
Improve stitch quality	104	2.81	1.359
Ban second hand products	104	2.77	1.450
Valid N (listwise)	104		

The findings in Table 4.16 indicate that when asked how to enhance purchases of home-made garments, the respondents (mean =3.05) gave marketing issues top priority. Providing good quality apparel, with (mean=3.00) placed in second. Awareness was third, with (mean=2.84) while stitch quality placed in fourth with (mean=2.81) and banning second hand products was the least favored factors.

### **4.7 Comparative Assessment of imported and local products**

#### **4.7.1 Overall garment preference**

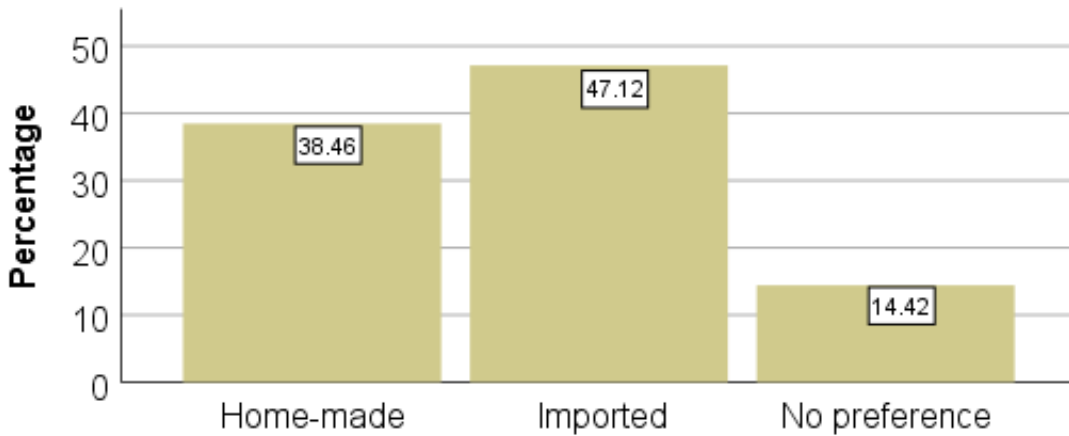


figure 4. 3 Respondents preferences of products

As shown in figure 4.3, majority of respondents, with 47.12 percent preferred imported clothing, while 38.5 percent preferred locally made clothing, and also 14.42 percent of total respondents had no preference. The finding shows a nearly balanced but import-leaning preference among consumers, with 47.1% favoring imported garments compared to 38.46% preferring home-made alternatives, while 14.4% expressed no particular preference.

#### 4.7.2 Choice of garment types

Table 4. 17 Respondents preference of garment types

Choice of garment types		Home- made	Imported	No preference
<b>Formal wear</b>	Frequency (104)	57	43	4
	Percentage (%)	54.8	41.3	3.8
<b>Underwear</b>	F (104)	35	47	22
	Percent (%)	33.7	45.2	21.2

<b>Casual wear</b>	F (104)	26	34	44
	Percent (%)	25.0	32.7	42.3
<b>Traditional/ethnic wear</b>	F (104)	100	1	3
	Percent (%)	96.2	1.0	2.9

### **Choice of formal wear**

The table 4.17 above presents findings with regards to the preference of formal wear of the respondents. As can be seen on the table home-made formal wear garment types were preferred, with 57(54.8%) of total respondents followed by imported, with 43(41.3%) and 4(3.8%) of respondents had no preference to formal wear garment types.

### **Choice of underwear**

Table 4.20 above shows the preference of underwear of the respondents. As shown on the table imported underwear garment types were preferred, with 47(45.2%) of the respondents followed by home-made, with 35(33.7%) of total respondents and 22(21.2%) of respondents had no preference to underwear garment types.

### **Choice of casual wear**

The findings in Table 4.20 above indicates the preference of casual wear garments. Majority of respondents, 44 (42.3%), responded that they had no preference, 34 (32.7%) preferred imported and 26 (25%) preferred home-made casual wear garments.

### **Choice of traditional/ethnic wear**

Results above in Table 4.20 indicates that 96.2% (100 respondents) preferred home- made traditional/ethnic wear; 2.9% (3 respondents) had no preference and only one respondent preferred imported traditional/ethnic wear. Findings show that 90% noted lack of cultural relevance as a disadvantage of imports (Table 4.13).

## **4.8 Discussion of findings**

### **4.8.1 Consumer Perception and Clothing Attributes**

According to findings of this study imported garments were consistently rated higher in terms of style/fashionability (mean = 4.23), quality (mean = 4.19), and availability (mean = 3.96) (Table 4.10). This aligns with previous research suggesting that consumers in developing countries often

associate imported goods with superior craftsmanship and trendiness (Ferguson et al., 2008). In contrast, locally made garments were perceived as having better price value (mean = 3.30) but lagged in quality (mean = 1.69) and availability (mean = 1.87) (Table 4.7). These findings indicate that while affordability is a strength of local products, consumers remain skeptical about their durability and design appeal.

The perception of lower quality in locally made garments was further reinforced by respondents' open-ended feedback, where issues such as uneven stitching, loose threads, and inferior seam quality were frequently cited (Table 4.9). This suggests that local manufacturers must prioritize production standards and quality control to compete effectively with imports. Additionally, the lack of brand recognition (92.3%) was identified as a major disadvantage for home-made garments, highlighting the need for stronger branding and marketing strategies.

#### **4.8.2 Consumer Attitudes and Ethnocentrism**

Despite the preference for imported garments in terms of quality and fashion, the study found that cultural significance (76%) and supporting the local economy (62.5%) were strong motivators for purchasing locally made clothing (Table 4.8). This indicates that patriotism and economic nationalism play a role in consumer behavior, consistent with the concept of consumer ethnocentrism (Shankarmahesh, 2006). However, these sentiments alone are not enough to drive widespread adoption of local garments, as practical considerations such as quality and style often take precedence.

Interestingly, environmental and ethical concerns were also noted as disadvantages of imported garments (Table 4.12). Some consumers expressed reservations about questionable labor practices in foreign manufacturing hubs, suggesting that sustainability and ethical production could be leveraged as selling points for local brands. However, these factors were not strong enough to override the perceived superiority of imported fashion.

#### **4.8.3 Consumer Patronage and Purchasing Behavior**

The study revealed a clear dominance of imported garments in the Ethiopian market, with 47.12% of respondents preferring imported clothing compared to 38.46% favoring local alternatives (Figure 4.3). This aligns with the preliminary findings, which showed that Chinese (25%) and Turkish (18.75%) garments dominate Addis Ababa's retail spaces. However, the data also showed niche preferences where local garments performed well. For instance, 96.2% of

respondents preferred locally made traditional/ethnic wear (Table 4.17), reinforcing the idea that cultural relevance is a strong driver for certain categories. Similarly, 54.8% favored home-made formal wear, possibly due to tailored fits and locally appropriate designs.

In contrast, imported casual wear (32.7%) and underwear (45.2%) were more popular, likely due to perceived comfort and brand trust. Another critical insight was the low wardrobe share of locally made garments. A staggering 63.5% of respondents reported that less than 40% of their wardrobe consisted of home-made clothing (Table 4.13), indicating that local brands struggle to capture everyday fashion demand. Consumers were more likely to purchase local garments for special occasions (83.7%) or when visibly better quality was evident (95.2%) (Table 4.14), suggesting that local manufacturers must improve consistency in quality to increase regular patronage. A promising finding was that 56.73% of respondents were willing to pay premium prices for locally made garments if quality matched imports (figure 4.3). However, 39.42% remained price-sensitive, indicating that competitive pricing remains crucial. Additionally, only 21.2% of respondents actively recommended local garments to others (Table 4.15).

## CHAPTER FIVE

### CONCLUSION AND RECOMMENDATIONS

#### 5.1 Conclusion

The study reveals a clear preference for imported garments among consumers in Addis Ababa, driven by perceptions of superior quality, fashionability, and brand recognition. However, local garments are valued for their affordability, cultural significance, and support for the local economy. Despite these advantages, challenges such as inconsistent quality, limited availability, and weak branding hinder their competitiveness. Findings indicated that Imported garments dominate the market, particularly in casual wear and underwear, while local garments are preferred for traditional/ethnic wear. Quality and style are the primary factors influencing purchasing decisions, overshadowing price and country of origin.

While many consumers are willing to support local industries, practical concerns about product quality and availability often take precedence. To bridge this gap, local manufacturers must address quality control, branding, and distribution. Collaborative efforts between policymakers, manufacturers, and marketers are essential to enhance the appeal of locally made garments and reduce reliance on imports. By implementing strategic improvements and fostering consumer trust, Ethiopia's garment industry can achieve sustainable growth and greater market share. Future research should explore the impact of policy interventions and evolving consumer trends to further inform industry strategies.

#### 5.2. Recommendations

- **Improve Quality and Design:**

Local manufacturers should prioritize enhancing the quality, durability, and fashionability of their garments to compete with imported products. Addressing issues like uneven stitching and loose threads can significantly improve consumer perception.

- **Strengthen Branding and Marketing:**

Investing in branding and marketing campaigns can help local manufacturers build recognition and trust. Highlighting cultural significance and patriotic appeal in advertisements may resonate with consumers.

- **Enhance Distribution and Availability:**

Improving supply chains and ensuring wider availability of locally made garments in retail spaces can make them more accessible to consumers.

- **Competitive Pricing Strategies:**

While local garments are perceived as affordable, pricing should remain competitive, especially for higher-quality products, to attract price-sensitive consumers.

- **Leverage Cultural and Ethical Advantages:**

Emphasizing the cultural relevance of local garments and promoting ethical production practices can differentiate them from imported alternatives and appeal to socially conscious consumers.

- **Government and Policy Support:**

The government should implement policies such as import restrictions or subsidies for local manufacturers to create a more favorable market environment. Strengthening quality standards and certification can also boost consumer confidence.

- **Consumer Awareness Campaigns:**

Initiatives to educate consumers about the benefits of supporting local industries, such as job creation and economic growth, can foster a stronger preference for home-made garments.

- **Innovation and Customization:**

Offering unique designs and customizable options can cater to consumers seeking individuality and better fit, particularly in segments like casual and formal wear.

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## APPENDIX A: QUESTIONNAIR

This questionnaire is designed to understand your perceptions, attitudes, and purchasing behaviors regarding both locally-made (home-made) and imported garments. Your responses will help researchers analyze consumer preferences in the clothing market. All responses will remain confidential and be used for academic purposes only.

### Section 1: Demographic Information

1. Gender: Mark only one oval.

- Male
- Female

2. Age group: Mark only one oval.

- 18-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55+ years

3. Employment status: Mark only one oval.

- Employed full-time
- Employed part-time
- Student
- Self-employed
- Unemployed

4. Monthly income (in Birr): Mark only one oval.

- Below 5000
- 5001 –10,000
- 10,001–20,000
- 20,001–30,000
- Above 30,000

5. How often do you purchase new clothing items? Mark only one oval.

- Weekly
- Monthly
- Every 2-3 months
- Every 6 months
- Yearly or less often

**Section 2: General Clothing Purchasing Behavior**

6. When purchasing clothing, which of these factors are most important to you? (Rank 1 - 5, with 1 being most important) Mark only one oval per row.

	Price	Quality	Brand name	Style/fashionabili	Country of origin
1.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. What are your primary sources of information when evaluating clothing products? (Tick all that apply).

- Advertising (TV, print, online)
- Word of mouth (friends/family)
- Social media influencers
- In-store displays and staff
- Online reviews
- Fashion magazines/blogs

**Section 3: Perception of Home-Made Garments**

8. How would you rate the following attributes of locally-made (home-made) garments? (1 = Poor, 2= Fair, 3= Good, 4= Very good, 5 = Excellent) Mark only one oval per row.

	1	2	3	4	5
Quality:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Style/fashionability:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Price value:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Durability:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. What are the main advantages you associate with home-made garments? (Tick all that apply).

- Supporting local economy
- Better quality
- Unique designs
- Cultural significance
- Better fit for local body types
- Other

10. What are the main disadvantages you associate with home-made garments? (Tick all that apply).

- Limited style options
- Higher prices
- Lower quality
- Poor availability
- Lack of brand recognition
- Other \_\_\_\_\_

#### **Section 4: Perception of Imported Garments**

11. How would you rate the following attributes of imported garments? (1 = Poor, 2= Fair, 3= Good, 4= Very good, 5 = Excellent) Mark only one oval per row.

	1	2	3	4	5
Quality:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Style/fashionability:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Price value:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Durability:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. What are the main advantages you associate with imported garments? (Tick all that apply).

- More fashionable/styles
- Better quality
- Lower prices
- Brand recognition
- Greater variety
- Other

13. What are the main disadvantages you associate with imported garments? (Tick all that apply).

- Not supporting local economy
- Poor fit for local body types
- Questionable labor practices
- Environmental concerns
- Lack of cultural relevance
- Other\_\_\_\_\_

### Section 5: Attitude and Patronage

14. What percentage of your wardrobe consists of home-made garments? Mark only one oval.

- 0-20%
- 21-40%
- 41-60%
- 61-80%
- 81-100%

15. Under what circumstances are you more likely to purchase home-made garments? (Tick all that apply).

- Special occasions
- Everyday wear
- When price is comparable to imports
- When quality is visibly better
- When supporting local causes
- Other \_\_\_\_\_

16. Would you be willing to pay more for home-made garments if they were of comparable quality to imports? Mark only one oval.

- Yes
- No
- Maybe, depending on price difference

17. How likely are you to recommend home-made garments to friends/family? Mark only one oval.

- Extremely unlikely
- Unlikely
- Neutral
- Likely
- Extremely likely

18. What could local manufacturers do to increase your purchases of home-made garments? \_\_\_\_\_

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### Section 6: Comparative Assessment

19. Overall, which type of garments do you prefer? Mark only one oval.

- Home-made
- Imported
- No preference

20. For the following garment types, please indicate your usual preference. Mark only one oval per row.

	Home-made	Imported	N preference
Formal wear	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Underwear	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Casual wear	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traditional/ethnic wear	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**የተከበራቹ የዚህ መጠይቅ ተሳታፊዎች :** ይህ መጠይቅ የተነደፈው በአገር ውስጥ የተሰሩ እና ከውጭ የሚገቡ ልብቦችን በተመለከተ የእርስዎን ግንዛቤ፣ አመለካከት እና የግዢ ባህሪ ለመረዳት ነው። የእርስዎ ምላሾች ተመራማሪዎች የገዢዎች ምርጫን በልብስ ገበያ ላይ እንዲመረምሩ ይረዳቸዋል። ሁሉም ምላሾች ሚስጥራዊ ሆነው ይቆያሉ እና ለአካዳሚክ ዓላማዎች ብቻ ጥቅም ላይ ይውላሉ።

**ክፍል 1: የስነ ሕዝብ አወቃቀር መረጃ**

1. ጾታ:

ወንድ

ሴት

2. የዕድሜ ክልል:-

18-24 ዓመት

25-34 ዓመት

35-44 ዓመት

45-54 ዓመት

55 ዓመት በላይ

3. የስራ ሁኔታ:-

የሙሉ ጊዜ ሥራ ተቀጣሪ

የትርፍ ሰዓት ሥራ ተቀጣሪ

ተማሪ

በግል ስራ የሚተዳደር

ስራ አጥ

4. የወር ገቢ (በብር):-

ከ 5000 በታች

5001 -10,000

10,001-20,000

20,001-30,000

ከ30,000 በላይ

5. በምን ያህል ጊዜ ውስጥ አዲስ ልብስ

ትግዛለህ/ሽ?

- በየሳምንቱ
- በየወሩ
- በየ 2-3 ወሩ
- በየ6 ወሩ
- በየአመቱ ወይም ባነስ ጊዜ

**ክፍል 2: አጠቃላይ የልብስ ግዢ ባህሪ**

6. ልብስ ሲገዙ ከእነዚህ ነገሮች ውስጥ ለእርስዎ በጣም አስፈላጊ የሆኑት የትኞቹ ናቸው? (1-5 በደረጃ አስቀምጥ፣ 1ኛው በጣም አስፈላጊ ነው)

	1	2	3	4	5
የልብስ ፋሽንነት	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ዋጋው	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
የምርትስ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ጥራት	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
የተመረተበት ሀገር	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. የልብስ ምርቶችን ስትገመግም ዋና የመረጃ ምንጮችህ/ሽ ምንድን ናቸው? (የሚመለከተውን ሁሉ ይምረጡ)

- ማስታወቂያ (ቲቪ፣ ህትመት፣ )
- በሰው(በጓደኞች/በቤተሰብ)
- በማህበራዊ ሚዲያ ተጽእኖ ፈጣሪዎች
- በመደብር ውስጥ ማሳያዎች
- Nonline
- የፋሽን መጽሔቶች

**ክፍል 3: ስለአገር ውስጥ ልብሶች ግንዛቤ**

8. በሀገር ውስጥ የተሰሩ ልብሶችን በሚከተሉት ባህሪያት እንዴት ይመዘኑታል? (1 = ደካማ፣ 2= ፍትሃዊ፣ 3= ጥሩ፣ 4= በጣም ጥሩ፣ 5= በጣም ጥሩ)

	1	2	3	4	5
ፋሽንነት	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
አገልግሎት የመቆየት አቅም	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ጥራት	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ዋጋው	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ተገኝነት/ የመገኘት አቅም	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. በሀገር ውስጥ ከተሠሩ ልብሶች ጋር የሚያያይዟቸው ዋና ዋና ጥቅሞች ምንድን ናቸው? ( የሚመለከተውን ሁሉ ይምረጡ)።

- የአካባቢ ኢኮኖሚን መደገፍ
- የተሻለ ጥራት
- ልዩ ንድፎች/ዲዛይን
- ባህላዊ ጠቀሜታ
- ለአካባቢያዊ የሰውነት ዓይነቶች የተሻለ ተስማሚ
- ሌላ

10. በሃገር ውስጥ ከተሠሩ ልብሶች ጋር የሚያያይዟቸው ዋና ዋና ጉዳዮች ምንድን ናቸው? (የሚመለከተውን ሁሉ ይምረጡ)

- የተገደበ የቅጥ/style አማራጮች
- ከፍተኛ የሆነ ዋጋ
- ዝቅተኛ የሆነ ጥራት
- አለመገኘት
- የምርት ስም እውቅና ማጣት
- ሌላ

**ክፍል 4: ስለ ከውጭ ለሚገቡ ልብሶች ግንዛቤ**

11. ከሀገር ውጭ የገቡ ልብሶችን በሚከተሉት ባህሪያት እንዴት ይመዘኑታል? (1 = ደካማ፣ 2 = ፍትሃዊ፣ 3 = ጥሩ፣ 4 = በጣም ጥሩ፣ 5 = በጣም ጥሩ)

	1	2	3	4	5
ፋሽንነት	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
የመቆየት አቅም	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ጥራት	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ዋጋው	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ተገኝነት/ የመገኘት አቅም	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. ከውጭ ከሚገቡ ልብሶች ጋር የሚያያይዟቸው ዋና ዋና ጥቅሞች ምንድን ናቸው? (የሚመለከተውን ሁሉ ይምረጡ)

- የበለጠ ፋሽን ናቸው
- የተሻለ ጥራት አላቸው
- በዝቅተኛ ዋጋ ይገኛሉ
- የምርት እውቅና አላቸው
- በተለያዩ ዓይነት ይገኛሉ
- ሌላ

12. ከውጭ ከሚገቡ ልብቦች ጋር የሚያያይዟቸው ዋና ዋና ጥቅሞች ምንድን ናቸው? (የሚመለከተውን ሁሉ ይምረጡ)

- የበለጠ ፋሽን ናቸው
- የተሻለ ጥራት አላቸው
- በዝቅተኛ ዋጋ ይገኛሉ
- የምርት እውቅና አላቸው
- በተለያዩ ዓይነት ይገኛሉ
- ሌላ

**ክፍል 5: አመለካከት እና ደጋፊነት**

14. እርስዎ በሙቶኛ ምን ያህል በሃገር ውስጥ የተሰሩ ልብቦች አሉት?

- 0-20%
- 21-40%
- 41-60%
- 61-80%
- 81-100%

15. በሃገር ውስጥ የተሰሩ ልብቦችን የመግዛት እድሉ በየትኞቹ ሁኔታዎች ውስጥ ነው? (የሚመለከተውን ሁሉ ይምረጡ)

- ልዩ አጋጣሚዎች ሲኖሩ
- የዕለት ተዕለት ልብቦች በሚያስፈልግ ጊዜ
- ዋጋው ከውጭ ከሚገቡት ጋር ሲወዳደር
- ጥራት በሚታይ ሁኔታ የተሻለ በሚሆንበት
- የአካባቢያዊ ምክንያቶችን ሲደግፉ
- ሌላ

16. በሀገር ውስጥ የሚሠሩ ልብሶች ከውጪ ከሚመጡ ልብሶች ጋር የሚነጻጸር ጥራት ቢኖር ለመግዛት ፈቃደኛ ይሆናሉ?

- አዎ
- አይ
- ምናልባት, በዋጋ ልዩነት ላይ በመመስረት

17. በሀገር ውስጥ የተሰሩ ልብሶችን ለጓደኞች/ለቤተሰብ የመናገር እድልዎ ምን ያህል ነው?

- በጣም የማይሆን
- የማይሆን ነገር
- ገለልተኛ
- ሊሆን ይችላል።
- በጣም የሚሆን

18. የሀገር ውስጥ ልብሶችን የመግዛት ባህሪህን/ሽን ለመጨመር የሀገር ውስጥ አምራቾች ምን ሊያደርጉ ይገባል?

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**ክፍል 6: የንፅፅር ግምገማ**

19. በአጠቃላይ፣ የትኛውን ዓይነት ልብስ ይመርጣሉ?

- በአገር ውስጥ የተሰራ
- ከውጭ የገባ
- አልመርጥም

20. ለሚከተሉት የልብስ ዓይነቶች፣ እባክዎ የእርስዎን የተለመደ ምርጫን ያመልክቱ።

	በሀገር ውስጥ የተሰራ	ከውጭ የገባ	አልመርጥም
ባህላዊ ልብስ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
የውስጥ ልብስ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
መደበኛ ለሆነ አለባበስ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
የተለመደ ልብስ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>