Fashion Retailing – Past, Present and Future.

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Abstract

This issue of Textile Progress will consider how fashion retailing has developed due to the application of the World Wide Web and Information and Communication Technologies (ICT). This paper first considers how fashion retailing has evolved, analysing retail formats, global strategies, emerging and developing economies and the factors that are threatening and driving growth in the fashion retail market. The second part considers the emergence of omnichannel retailing, analysing how retail has progressed and developed since the adoption of the internet and how ICT initiatives such as Mcommerce, digital visualisation online and in-store and self-service technologies have been proven to support progression and expansion of fashion retailing. Finally the paper will conclude with recommendations on future research opportunities in order to better understanding of ICT and omnichannel retail to increase and develop the knowledge and understanding of the sector in order to provide fresh impetus to an innovative and competitive industry.

1. Technology and Fashion Retailing

This paper responds to the need for an exploration into the role of Information and Communication Technologies in retailing, in particular considering the influence of the Internet in the context of fashion industry. Changes in retailing are happening in abundance and they are impacting retailers from all angles whether in store location, product range or pricing; indeed the internet has without doubt exerted the greatest single force upon retailing both in the UK and abroad (Berman 2010). Many of the changes have been driven by consumers' adoption of online retail which is now high across all ages and social groups, as consumers have become more willing to shop online and retailers continue to improve their online offering (Verdict, 2013); as a result clothing has become the fastest-growing online category of goods bought in the United Kingdom (Blazquez, 2014). New business models such as ecommerce and mcommerce have changed the fashion retail landscape. In order to manage products, sales and customer relationships, retailers require effective and innovative ICT systems, which include better POS systems, secure payment systems and integration of distribution channels to provide a clear process for retailers and a better service for customers. The fashion and clothing industry is extremely important for the textiles industry as it plays a crucial role in the economy and social well-being in numerous regions of the world, thus fashion retailing is a significant component of the broad study of textiles (Barnes, 2013) and therefore an important area to review.

Past trends have seen retailers hold large store portfolios and growth often came from increased store space. The rise of online shopping has impacted the importance of store numbers and there is now a move towards omnichannel retailing, with store quality and size more critical to ensure consumers still want to shop on the high street (Drapers 2012). Technology affects every aspect of retailing from operating strategy to consumer behaviour (Berman 2010). Information and Communications Technology (ICT) in retailing can be used to support retailers in managing data about consumer behaviour by providing information about products and trends, which enables retailers to develop more effective retail and marketing strategies and from a consumer perspective provide enriched information to support the consumer decision making process (Pantano, 2014). Fashion retailers must consider all channels to market holistically, taking advantage of all of their touch points with the consumer, including mobile devices, social networks and developing interactive in-store technologies. Competitive advantage is critical to fashion retailers, creating differentiation and correct targeting of consumer groups in order to encourage loyalty from consumers is one of the key strategies that can lead to strong competitive advantage (Lewis and Hawkesley, 1993). Thus, this paper will investigate innovation in fashion retail, focusing on technological developments that have accelerated retailers to become global fashion brands, considering factors such as retail formats, process innovations, customer experience, new marketing media and order fulfillment technologies to develop retail strategies.

2. Introduction to Fashion Retailing

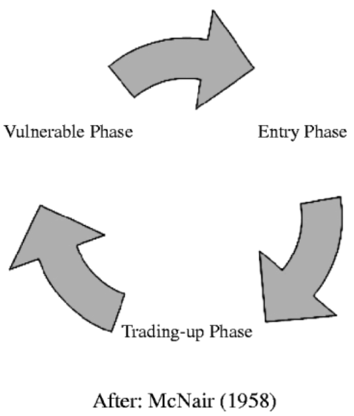
This section will firstly define what retailing is in order to set the context of the paper presenting theories of growth and development and detailing the UK fashion retail market. A study of fashion retailing cannot be undertaken without an appreciation of the global aspects of the fashion retail industry; this section goes on to provide an overview of the global fashion retail industry, including the structures in developed, developing and emerging markets which thus enables readers to have a better grasp of the issues facing the modern fashion industry operating in a globalised market and the global fashion industry as it is today.

2.1 Retailing

Retailing can be defined as *'the set of activities that markets products or services to consumers for their own or personal household use. It does this by organising their availability on a fairly large scale and supplying them to consumers on a relatively small scale'* (Newman and Cullen 2002 p.12). As an industry, retailing is paramount to the economy of most nations and has a strong influence on consumers and their lives (McGoldrick, 2002). This sections looks at two retail theories, The Wheel of Retailing (McNair, 1958) and The Retail Lifecycle. In addition a brief history of retail is discussed.

2.1.1 The Wheel of retailing

Kent and Omar (2003) examine the 'Wheel of retailing' discussing its relevance to current day business. The wheel was developed by McNair in 1958 with reference to retailing in the USA.



Source: Kent and Omar (2003)

The theory purports that there is a pattern of entry and development for retailers and each moves from being 'low status, low margin' to' 'high cost/high price' and then becomes open to new market entrants who come in to occupy the low status position and threaten to take consumers away from the original retailer (McNair, 1958). Hollander (1960) proposed reasons why this pattern emerges and it is evident that errors in management are made as the business grows; whether this is through a lack of attention to detail or a lack of perspective. When these factors are aligned with consumers demanding more of the business, strategic decisions can often be made for the wrong reasons leading to business vulnerability (McGoldrick, 2002). Today where retailers occupy very distinctive areas of the market and often start out as upmarket retailers rather than low cost, the Wheel model is considered of less use, although (Kent and Omar 2003a) claim that it is still valuable when examining the need for retailers to expand through new product ranges and store formats using more innovative ideas.

2.1.2 The Retail Life Cycle

The Retail Life Cycle theory was developed by Davidson *et al.,* (1976) with the intention of challenging some of the limitations of the 'Wheel of Retail'. It critiques the wheel's focus on the downwards movement of costs and margins when often businesses enter markets at a more upmarket position that this model implies (Davidson *et al.,* 1976). The Retail Life cycle is based on the Product Life Cycle (Vernon, 1966) and works on the premise that the retailer and the format in which they trade also have a limited life cycle. This has implications for location and property investment, timescales for profitable trading, and changes to store formats. Studies of retailing in the USA showed that for example city centre department stores reached their peak many years ago (Davidson *et al.,* 1976); although in the UK the likes of Selfridges, Harvey Nichols and House of Fraser have shown how to succeed by adapting to consumers changing wants and needs and adapting their retail business to become multichannel businesses. They have further shown understanding of retail as leisure, including food and beauty in their offerings.

2.2 The History of retailing

The history of retail dates back many years to simple markets where traders sold their wares to local people; indeed although these were basic operations they were deemed very important to the economy and were regulated through a royal charter (Kent and Omar 2003b). As the popularity of market trading grew the development of permanent residency for skilled craftsmen in the areas of footwear and clothing also became common. The general retail store was born in the 1800's selling a broad range of merchandise (Samli 1989), and it is suggested by Howe (2005) that these traders were unable to be successful and therefore transformed their businesses into specialist stores. Moving into the 19th century the specialists evolved into department stores, which were clothing based in the first instance and grew into more varied merchandise as they developed (Tse, 1985).

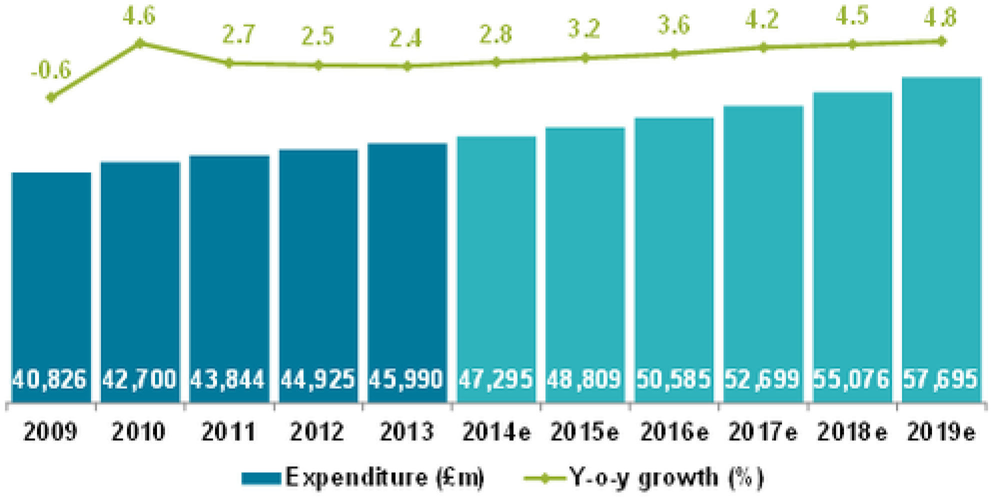
The evolution of retailing in the last 50 years has been notable and rapid, with changes in the balance of power between manufacturers and retailers evident in the current structure of the retail industry. The arrival of the 'variety store' in the early 20th century paved the way for some of the retail giants that still exist today, for example Marks and Spencer and BHS, although some early champions of this format did not survive, Woolworths and Littlewoods being perhaps most notable (McGoldrick, 2002). Where retailers were once simply places to buy goods, they are now powerful businesses, having a greater control over their marketing mix; indeed they view marketing as critical to success whereas once they viewed it with scepticism. Retail has moved from the 1950s when 'Manufacturer was king' through the 1960s when 'Consumer was king' to the current time where 'Trade is king', meaning that now there are a more concentrated number of larger more powerful retailers in each sector and they are involved in the marketing of their stores and the brands that they sell (Pommerening, 1979). In current times retailers face shorter life cycles, which mean that it is much more challenging to see a return on investment (McGoldrick, 2002).

2.2.1Fashion Retailing in the UK

Fashion retailing in the UK has been revolutionised in the past ten years by the advent of value retailers such as Primark, Peacocks and the supermarkets, who have grown in order to meet consumers' desires to have more clothes at a lower price and who have consequently created and sustained deflation in the fashion industry up until 2010 (Mintel 2011). Price has been a critical issue for many fashion retailers, certainly in the last five years due to the recession, and this factor has also been combined with consumers becoming less loyal and less willing to pay too much for fashion that has essentially become throwaway (McColl and Moore 2011). In addition to the difficulties concerning price, the fashion retail market has also seen the arrival of many new overseas retailers onto British high streets, with H&M, Mango and Zara now becoming popular household names for UK fashion consumers. New market entrants have brought leading edge fashion delivered to consumers at high speed and the excitement and creativity of the fashion industry combined with the hunger for new product from consumers has led to a period of several years of sustained growth, with womenswear one of the key categories. The advent of fast fashion which started in 2002 has helped to drive this growth as consumers have been driven to buy clothes to keep up with latest trends and celebrities (Barnes and Lea-Greenwood 2010).

The value of clothing and footwear in the UK is forecast to be worth £47,295m in 2014, see Figure 1 (Verdict 2013) showing year on year growth of 2.8%, which although stronger than some retail sectors, is a relatively weak performance when compared to pre-recession years. Prices have risen due to operating cost increases; however, demand for fashion has been weak so ultimately retailers have resorted to discounting, which has then lead back to pressure on margins. The skill that retailers require in order to assess potential demand for products is to purchase correctly, as supply is key (Dunne, 2008). There has been a general upturn in the fashion sector and consumers are becoming more confident again, meaning that clothing consumption is slowly increasing but despite consumer optimism it is clear that the clothing market is sensitive to cost increases which ultimately affect profits (Mintel, 2013). Growth in the sector is evident and will be sustained over the next five years, coming from focused retailers who manage a multichannel strategy carefully, as much is attributed to sales transferring to online retailers, both established and new (Verdict 2012). Fashion retailers need to capitalise on new opportunities as innovation will sustain the category such as key players such as Primark, ASOS and John Lewis who continue to develop distinctive propositions for their respective consumer groups (Mintel, 2013)

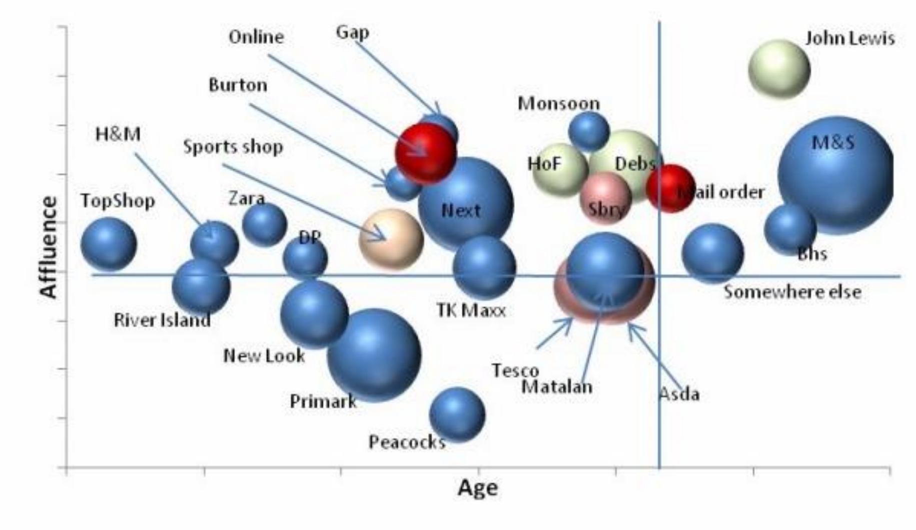
Figure 1. Clothing & footwear expenditure (£m) and growth (%), 2009–19e



Source: Verdict (2013)

Jackson and Shaw (2008) note that the point of difference for UK fashion retailing is that the structure of the industry is now dominated by fashion retailers such as Topshop and Zara who have developed their own ranges to become competitive and sought after high street brands. The UK fashion market is dominated by large own brand multiple retailers and has been significantly altered by the arrival of new market entrants from across the world (Hines and Bruce 2007; Jackson 2007) Figure 2. shows the UK fashion retail market in 2011.

Figure 2. The Structure of the UK Fashion Market



Source: Mintel (2011)

It is evident from Figure 2 the impact of international retailers such as Zara, H&M and Mango who have not only created further competition for consumer’s spending but have shaped a difficult environment for retailers to develop and maintain competitive advantage and a point of difference in the mind of the consumer. Added to this, competition on the high street from value retailers such as Primark and Matalan has intensified and shows no sign of abating.

The fashion retail market in the UK demonstrates the breadth of choice that consumers are offered, with fashion being sold through both specialist and non-specialist outlets, and many retailers operating a multichannel approach that includes ecommerce, click and collect and mobile applications for smartphones, this will be discussed in-depth in section 8. Where there were once exceptions to this approach, notably Matalan and Primark chose not to follow a multichannel approach, however these businesses are now following the trend and responding to changes in consumer behaviour. Indeed some of the leading fashion retailers such as Zara and H&M were slow to launch UK websites, both waiting until 2010 to take this approach.

Womenswear as a sector is overcrowded but this does offer a wide range of choice to consumers (Mintel, 2014). Evidence shows that it is the stronger more focused retailers that are succeeding, for example, Zara has a very clear USP providing unique, frequently updated designs at high street prices. Regularity of range refreshment is becoming more important to female shoppers, as it signals up to date and trend led fashion to consumers. M&S are said to be suffering despite numerous efforts to change ranges and communication, however other retailers in this sector are thriving for example John Lewis who have attracted fashion seekers without driving away their core consumer (Mintel, 2014).

2.3 The Structure of Global Fashion Retail Markets

A study of fashion retailing cannot be undertaken without an appreciation of the global aspects of the fashion retail industry. This section provides an overview of the global fashion retail industry, including the structures in developed, developing and emerging markets which thus enables readers to have a better grasp of the issues facing the modern fashion industry operating in a globalised market and the global fashion industry as it is today.

2.3.1 Globalisation

Fashion retailing is a global industry, and it is important to understand the context of the global market in order to understand how the market is structured. The internationalisation of the fashion industry, particularly the sourcing side of it, has taken place over many years and has occurred largely as a result of increasing off shore production, as companies chase low cost labour in developing economies. This has occurred against a backdrop of wider 'globalisation'. Theorists have long debated the definition of the term globalisation. Here are some examples:

'To economists globalisation is seen as the increasing internationalisation of production, distribution and marketing of goods and services.' Levy (1995)

'(Globalization is) the worldwide diffusion of practices, expansion of relations across continents, organisation of social life on a global scale, and growth of a shared global consciousness.' Ritzer (2006)

'(Globalization is) the process whereby the world's people are becoming increasingly interconnected in all facets of their lives.' Kunz & Garner (2007)

With these definitions of globalisation in mind, it can be argued that the internationalisation of the fashion industry in terms of its overseas sourcing is only one aspect of globalisation. Globalisation is a result of the internationalisation of many economic, technological, social, cultural and political activities including:

- *Global consumer markets* – these are emerging as a result of developing economies and some degree of political liberalisation, for example China and India are now two of the fastest growing consumer markets in the world attracting many western brands and changes in political control have made it easier for western companies to do business in these markets.
- *Global communication* – advances in technology have enabled communication to take place across the globe instantly enabling buyers to communicate with overseas suppliers, consumers to access information and companies to communicate with consumers around the globe. An example of this can be given in regard to the sourcing of fashion garments, many companies use online intranet technology to communicate with designers, manufacturers, quality controllers etc. who may each be located in a different corner of the globe such as Gerber Technology's WebPDM software.
- *Global business* – as competition increases, companies increasingly have a global perspective in the way they do their business for example as business needs become more global (in terms of competition, sourcing, expansion, sales

etc) they must develop strategies to manage the complexities of international business. Companies are increasingly doing business overseas meaning global competition is taking place in every corner of the world so even small local companies now have global competitors for example a small independent fashion boutique in France may find itself in competition with an international fashion retailer like Zara. As global trade increases, co-operation and alliances between countries emerge to facilitate the overseas business activities for example the North American free Trade Agreement (NAFTA) which facilitates free trade between the USA, Canada and Mexico.

- *Global logistics* – advances in technology enable products to be transported efficiently and effectively around the world making it increasingly easy to source product from countries where it is not necessarily consumed.
- *Global customers* – shifts in social and cultural outlooks, coupled with improved communication, have created a generation of 'global' consumers as consumers in virtually every country are exposed to fashion through music, film and the internet and so in many countries, the perceived difference between fashion consumers is minor, for example a company like H&M believes that a strong brand with a good fashion offering can be a success in virtually every country in the world as consumers of 'fashion' are the same worldwide.

2.3.2 Internationalisation of Fashion Retail

Taking into account the rise in globalisation over the last few decades, it is clear that the fashion industry is a truly global industry. The textile and clothing industry is probably one of the most widely dispersed on the earth present in both highly developed as well as emerging economies. Where once fashion garments were produced and consumed in the same country, there are now manufacturers all over the world making fabrics and garments for sale by retailers that are increasingly global in their spread, to consumers who consider themselves to be world consumers. Globalisation has provided the perfect conditions for fashion retailers not only to source globally, but also to internationalise their consumer facing business. There are a number of globalisation factors that come into play to facilitate internationalisation of fashion.

Globalisation has played a part in the developing and emerging economies of the world. For example as production has shifted to countries such as China, India and Vietnam, this has contributed to the development of their economies, creating wealth and therefore a growing class of wealthy consumers who, in a world where they are exposed to global communication, wish to buy into a 'rich western' lifestyle creating demand for fashion brands. A 2013 Bain survey of global consumers found approximately 205 million luxury consumers in the established consumer markets of North America, Western Europe and Japan compared with a combined total of 125 million in the 'newer' retail economies of Eastern Europe, Asia, Africa and Latin America, with the fastest growing market for luxury goods being China.

In the more established consumer markets of developed nations such as Japan, Europe and the USA where the majority of today's global fashion retailers are owned (i.e. have their headquarters), fashion retailers have grown organically over the last 30 years through expansion in their domestic markets, to such an extent that many have reached saturation point in terms of domestic expansion. Examples of fashion retailers who have reached saturation in their domestic market include The Gap (USA) and H&M (Sweden). Having reached saturation in their domestic market, fashion retailers have looked to international expansion to grow their businesses first with expansion into geographically or culturally close markets, but increasingly in the new millennium expansion and growth is being achieved by internationalisation into emerging economies of the developing world. Many forward thinking fashion companies regard Asia and the Middle East as the key areas for growth in the fashion market as these are the regions with some of the fastest growing consumer markets. The various markets and their characteristics are discussed in further detail in section 2.3.4.1 and 2.3.4.2.

International fashion retail includes brands internationalising their retail operations as well as own-brand fashion retailers (both wholly owned and part of large retail conglomerates) increasing their international expansion. Fashion is considered to be one of the fastest growing sectors of international retailing and these retailers have become global 'super brands' in their own right with retail presence across all continents of the world. In analysing the world's biggest global retailers, the vast majority of the top 10 are supermarket groups such as Tesco (UK), Wal-Mart (USA) and Carrefour (France) but it is important to mention these as supermarkets increasingly offer fashion as a core part of their business, making them extremely powerful players in the global fashion market.

Ownership of the global fashion retailers is currently concentrated in the West and Japan. The sheer size of these global fashion retailers means that they hold an enormous amount of power over the global fashion supply chain, which can cause tension in terms of the pressure the retailers put on manufacturers to produce goods. The global spread of international fashion retailers is varied with some such as Federated Department Stores operating in only three countries in a concentrated geographic location, compared with Inditex with stores in 63 countries in every continent of the globe (Deloitte, 2008).

The process of internationalisation of retail is modelled by Moore and Fernie (2004) based on work by Dawson (1994) and Sparks (1996) representing the internationalisation of retail as a continuum of activities from invisible to visible dimensions as depicted in Figure 3.

Figure 3: The Dimensions of Retail Internationalisation (Moore & Fernie, 2004)

Stage 1	**Stage 2**	**Stage 3**	**Stage 4**
Launch couture/RTW via wholesale in capital city department stores	Open couture/RTW flagships in capital cities	Open diffusion brand flagship stores in capital	Open diffusion stores in key provincial cities
↓		↓	
(Leading to…) Extend wholesale availability of RTW to key stores in other major cities		(Leading to…) Maximum availability of diffusion brands via wholesale within capital and provincial cities	

Source: Moore and Fernie, 2004 in Bruce, Moore and Birtwistle, 2004.

The model in Figure 3 demonstrates how retailers internationalise starting with relatively low risk internationalisation such as financial investment (e.g. buying shares) or cross-border shopping (e.g. consumers from Canada shopping in the US) to transfer of know-how (e.g. business practices in a particular market) to the relatively higher risk activities of international sourcing (e.g. from low-cost labour countries) and finally to internationalisation of operations (e.g. the opening of stores in overseas markets) (Moore and Fernie, 2004). In international fashion retailing, internationalisation of sourcing has taken place for many years as a result of the move to shifting production to low-cost labour countries, but it is clear that internationalisation of retail operations is now firmly part of the competitive retail landscape.

The biggest challenge facing fashion retailers operating in a global market is how to market to consumers in a variety of international markets. A dimension of globalisation is the internationalisation of consumers markets, their emergence and the internationalisation of social aspects of consumer life. It is argued that as a result of globalisation (or perhaps it is a cause of globalisation), consumers are converging in their tastes and the way they behave. For example it could be argued that young fashion consumers aged 15-25 have similar wants and needs for fashion products whether they live in Shanghai, Seattle or Seville. However, this theory is challenged and commentators in the field of globalisation and international retailing argue that despite a phenomenal rise in the sale of goods internationally, consumers remain divergent in their wants, needs and behaviours. This debate influences a firm's internationalisation strategy by determining the extent to which they take a discrete incremental approach to overseas expansion tailoring their retailing activities on a case by case basis to each individual international opportunity, or to the other extreme whereby there is a global strategy which directs a single approach to all retailing activity across the globe.

The international retailing strategy will influence whether a firm chooses to standardise or adapt their retail mix activities (see section 3). The decision whether to standardise or adapt retailing activities is a fundamental component of international fashion retailing strategy. Even if it is established that fashion consumers have similar needs the world over (and indeed this is up for debate), differences in the retail environment of every market in which a company does business will affect the retailing activities in that country because these factors shape and drive consumer needs and wants in that particular market. The retail marketing environment consists of political, economic, socio-cultural and technological factors (also referred to as PEST factors) (see section 4 for more information on PEST factors). Table 1 shows examples of how characteristics of the macro environment of each market may differ from that in the domestic market thereby affect marketing activities for a fashion company.

Table 1: Impact of the Macro Environment on International Fashion Retailing

Environmental Factor	Domestic Market	International Market	Impact on Retailing Activities
Political	Free trade	Heavily regulated/ controlled	Entry method into the international market may have to be with a local partner e.g. a joint venture
Economic	Mature market	Emerging economy	Retail marketing communications in the international market may have to focus on educating consumers about the brand proposition where they have not been previously exposed to fashion branding
Socio-cultural	Main language English	English not widely spoken or understood	Brand names or advertising campaigns may have to be re-done in local languages
Technological	Reliable communication & transportation infrastructure	Disparate internet access	Communication & transportation subject to control or disruption; Marketing communication through the internet may not be effective; Supply chain efficiency may be lost due to poor communication with overseas supply chain partners or disruption to transportation

Table 1 demonstrates the impact the macro environment may have when managing business in two markets (one domestic and one overseas), but for many fashion retailers, their business activities down the supply chain and also consumer facing, take place in a wide range of different countries. Therefore it is clear that international fashion retailing becomes increasingly complex the greater the extent of internationalisation (i.e. the more countries which are involved in the business) the company is involved in.

Despite the diversity of macro environments which may impact the retail mix, the decision whether to standardise or adapt the retail mix is a complex one. Since retail marketing is about satisfying consumer demand which is shaped by the macro environment, it may seem obvious that retail activities should be adapted to suit the local environment since it means that retailing activities can be better suited to satisfy local needs. However, there are also significant disadvantages associated with adaptation, not least the significant cost involved in the adaptation of retail activities for every international market. Similarly, by following a strategy of adaptation of the fashion retailing mix, some of the attraction of doing business internationally (e.g. benefits of scope; advantages offered by low cost countries etc.) as well as the appeal of the global brand may be lost.

The strategic alternative to adaptation is standardisation whereby all aspects of the retail marketing mix remain the same in every country in which the business operates. There are several significant advantages to this strategy, particularly in terms of economies of scale (to be gained in areas of production, R&D, marketing etc.). As globalisation increases further, weight is given to the argument that consumers are increasingly similar, thereby making standardisation a more realistic option. In reality, although two strategic alternatives are presented, the vast majority of fashion companies take a dichotomous approach by standardising the retail marketing mix where possible and imposing adaptation where necessary to suit local consumer demand.

2.3.3 Fashion Retail Market Formats and Structure

This section aims to provide an overview of the types of retail formats, evaluate competitive positioning and trends in various formats and consider the characteristics and structure of different fashion retail markets.

2.3.3.1 Fashion Retail Formats

Fashion retailers can vary significantly. There is no single definition of fashion retail formats (Brown, 1986, cited in McGoldrick, 2002). In fact, in his seminal textbook 'Retail Marketing' McGoldrick suggests that the lines defining retail formats have become so blurred they should rather be considered against a series of characteristics each with their own continuum (see Figure 4) and then if we consider fashion retail in the broadest terms, apparel can be sold in specialist apparel stores, grocery stores, department stores, independent stores as well as luxury stores and sports stores (if we consider sports/leisurewear as 'fashion').

Specialist apparel 'own-brand' retailers

Traditionally these formats have dominated fashion retailing, and examples include H&M, Zara and The Gap. Typically they sell only their own products, specialising specifically in apparel (although they may also offer small associated ranges in accessories, footwear and other lifestyle products), under the retailer's brand associating the products' brand name and brand image, with the brand store image (Ailawadi and Keller, 2004). This branding strategy is also referred as monolithic or mono-brand strategy (Perrey and Spillecke, 2012), private label brands, store brands or own-brands (Zentes et al, 2012). In this context the retail branded product would be available exclusively in the retailers own stores, and the products would be typically manufactured by a third party (contracted manufacturer) under license (Beneke 2010). These fashion retailers are usually 'multiples' or 'corporate chains' with many outlets achieving significant economies of scale and buying power (McGoldrick, 2002), they have dominated the sector and the supply chain, usually wielding significant power over their suppliers and driving down prices. These fashion retail formats have tended to proliferate in the value, middle and premium market, but it is a highly saturated format and competition is fierce. The successful value players have increasingly driven down prices, for example New Look in the UK, and the premium fashion retailers have focused on product quality, lifestyle and brand equity, for example Abercrombie & Fitch. This has left some of the poorly defined middle market players with difficulties in their strategic positioning, for example Kookai in the UK had poor brand equity and no price advantage. One of the most significant trends in these specialist retail formats has been the growth in companies who were previously brand manufacturers moving into retailing. For example, the foundation of the Ralph Lauren business was in the manufacture of branded apparel, which would typically be retailed via department stores or independent stores. However increasingly these so called 'manufacturer brands' are moving into the retail business and opening their own retail outlets in an attempt to garner more control over their channels to market. This trend tends to work best at the premium and luxury end of the market where there is sufficient brand equity to extend the brand proposition to the store environment which becomes an extension of the branded product. This strategy has given rise to the exciting development of innovative flagship stores, which provides and area of academic study in its own right. The key issue in considering this new development in specialist retail is that it considerably blurs the lines between what we now understand by a ‘retail’ business and a ‘fashion’ or ‘branded’ business: is Louis Vuitton a brand or a retailer?

Figure 4. McGoldrick’s Retail Format Dimensions

Single store	⟷	Groups of stores
In town	⟷	Out of town
Proximity	⟷	Destination
Small	⟷	Large
Mature	⟷	Innovative
Mainly food	⟷	Non-food
Specialised	⟷	Generalised
Niche	⟷	Commodity
High added value	⟷	Discounter
Experiential	⟷	Functional
Store based	⟷	Home based

Source: McGoldrick (2002)

Department Stores
Department stores are thought to be the oldest examples of large format retailing, they are large stores typically over several floors selling a wide range of goods including apparel, homewares, toys, electricals and other household goods (McGoldrick, 2002). These formats can operate at all levels of the market from value to premium and some at the luxury end for example Harrods, Selfridges and Bergdorf Goodman. Fashion apparel is typically the key offering of a department store and in many ways defines its market position and brand proposition (although there are some exceptions, for example John Lewis in the UK is more well known for their household goods rather than fashion offering). Traditionally department stores sold branded goods sourced from other companies, for example Harvey Nichols currently stocks brands such as Jil Sander, Givenchy and Issa, however increasingly department stores are leveraging the brand equity of the retail brand and extending into the ‘own-brand’ sector. This strategy tends to lend itself to the middle market department stores and has been a successful approach for Macy’s in the USA and Debenhams in the UK.

Variety stores
Variety store formats are something of a cross between multiples and department stores. They tend to sell only their own-label products but have the same breadth of product as a department store. One of the best known examples of a variety store is Marks and Spencer in the UK.

Independents
These are small scale stores (in terms of both store footprint and number of outlets), stocking branded fashion merchandise. Although these stores remain significant in

fashion retail formats, particularly in certain markets such as France and Italy, they have been squeezed by the other formats because they simply do not offer the same buying power and therefore cannot compete on price at any level of the market.

Supermarkets

These store formats dominate the top world retailers and include Tesco, Walmart and Carrefour. In fashion retail terms they are very interesting since increasingly large footprints of these stores are being taken up by non-foods, of which fashion/apparel is a key offering. This is because the profit per square foot for non-food is much larger than for grocery where profit margins are squeezed.

Discount stores

Discount stores sell products at a lower price to the original or recommended retail price, for example they may sell out of season product, seconds, product sourced from a ‘grey’ market or in some cases specially produced merchandise which does not fit with a brand’s core offering. It should be noted that this format is distinct from a ‘value’ player whose low prices are a strategic proposition i.e. the prices starts low rather than the high (usually offered by another format) then discounted price strategy offered by the discounters. Discounters have seen significant growth over the last few years and the TJX group trading under TJ Maxx in the USA and TK Maxx in the UK is now one of the biggest global retailers (Deloitte, 2013).

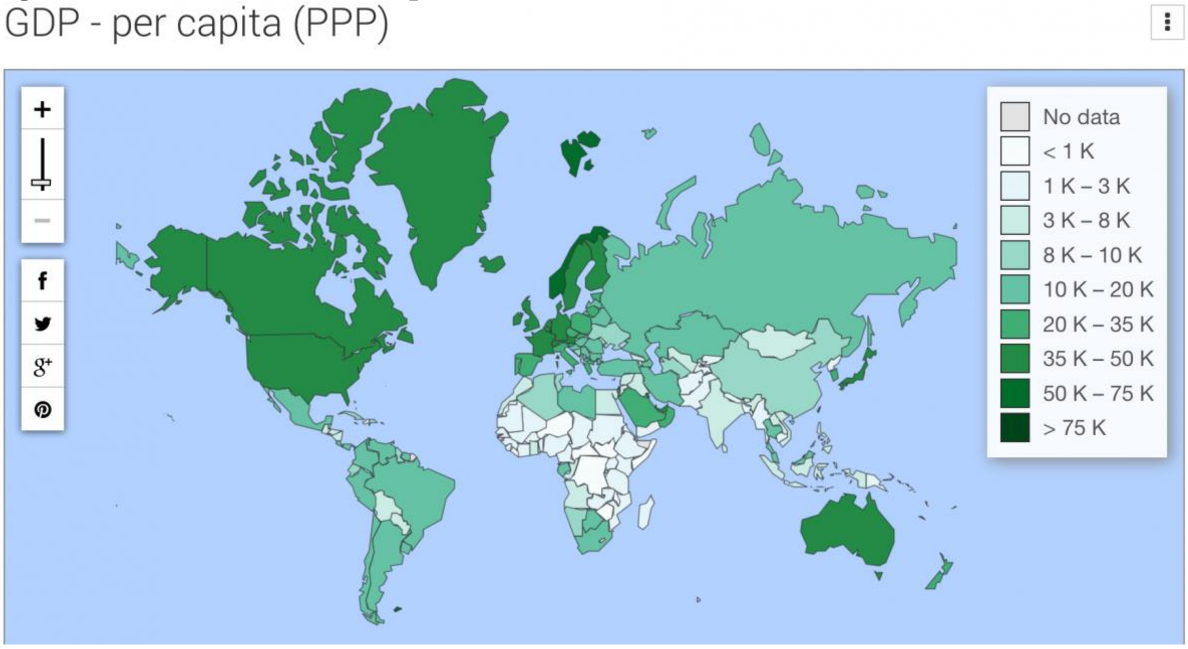
Having established that fashion retail is a global business, and discussed the challenges faced by fashion retailers operating in this context, it is important to understand the nature and diversity of the various fashion retail markets.

2.3.4 Developed (Mature) Fashion Retail Markets

Typically the markets of the industrialised nations of North America, Western Europe and Japan are considered to be ‘developed’ or ‘mature’ retail markets. These are the retail markets where retail ownership is most heavily concentrated as a result of the exponential growth in retailing during the post war growth years of mass consumerism in the 1960s and 70s, typically seen in the map below (Figure 5) in the regions with the darkest colours.

It is interesting to note that in every case of the developed nations, at some time or another they have used the production of textiles and/or apparel as a basis on which to build their economic growth (Kunz and Garner, 2011). Although in the majority of cases, as a result of globalisation (as discussed in section 1.2.2), the production side of fashion retail has shifted to countries which have lower labour costs, these are nations with highly sophisticated, well evolved and well established fashion retail markets, with a concentration of ownership in the retail sector. A 2010 analysis of the world’s top 250 retailers by Deloitte (2013) found that 86% of them were retailers with ownership in one of these developed nations, and around 90% of the total value of revenue derived from these nations.

Figure 5. Global Economic Map



Source: www.countrylicious.com (2013)

Developed nations share certain characteristics for example highly sophisticated consumers with little brand loyalty and high levels of price sensitivity (Christopher, 1996). Another key feature of all developed nations in the context of fashion retailing is that they are largely saturated markets. Thus fashion retailers are having to constantly innovate in order to maintain and/or grow their market share in these highly saturated markets, for example through the use of changing sourcing strategies, retail format/concept innovations (Vida, 2000), retail theatre, in-store experience and omnichannel retailing, all of which are discussed in this paper. As well as looking at innovative approaches in the domestic markets, fashion retailers have increasingly looked at growth via expansion into international markets and the Deloitte study found that the top global retailers were also the most diversified in terms of the countries in which they have retail outlets (Deloitte, 2013).

Table 2: Top Global Specialist Apparel[1] Retailers (of the Top 250 Retailers)

Retail Revenue Rank	Name of Company	Country of Origin	2011 Retail Revenue (US$m)	2011 Group Revenue (US$m)	No. Countries of Operation
42	The TJX Companies, Inc.	U.S.A	23,191	23,191	7
47	Inditex, S.A.	Spain	19,157	19,157	87
55	H&M Hennes & Mauritz AB	Sweden	16,974	16,974	43
68	The Gap, Inc.	U.S.A.	14,549	14,549	41
96	Limited Brands, Inc.	U.S.A.	10,364	10,364	50
100	Fast Retailing Co. Ltd.	Japan	10,028	10,057	20
121	C7A Europe	Belgium/Germany	8,762	9,421	20
123	Ross Stores, Inc.	U.S.A.	8,608	8,608	1
159	Shimamura Co., Ltd.	Japan	5,914	5,914	2
170	Next plc	U.K.	5,378	5,513	68
187	Associated British Foods plc (Primark)	U.K.	4,889	17,777	7
198	Landmark Group	UAE	4,518	4,700	11
201	Group Vivarte	France	4,491	4,491	55
208	Arcadia Group Ltd.	U.K.	4,304	4,304	41
222	Abercrombie & Fitch Co.	U.S.A.	4,158	4,158	17
238	Esprit Holdings Ltd.	Hong Kong SAR	3,881	3,881	72

Source: adapted from Deloitte (2013)

The key issue in the fashion retail sector in the developed nations is the stagnation of growth as a result of the global recession and saturation of the domestic markets. In retail terms, these markets offer well established infrastructure and fashion retailers are constantly looking for innovation either in products or services as a way of achieving competitive advantage or growth (Reinartz et al, 2011), for example ASOS in the UK now offers same day delivery of their online orders. Much of the academic literature on the latest thinking around fashion retail (much of which is covered in this paper) tends to relate to the established markets.

2.3.4.1 Emerging Economies

Emerging markets are those that have developing economies where growth in income per capita and GDP show a trend for significant growth (Haplete, 2011). Emerging markets are predicted to be the greatest opportunity for growth for global businesses (Welsh *et al.,* 2006) and represent approximately 80% of the world's population making them extremely attractive propositions for fashion retailers as consumerism grows. Furthermore, in terms of fashion retail, the consumers in these markets are hungry for 'western' style products and brands which they feel represent wealth and consumerism. As a result of the challenges of growth stagnation in domestic markets, fashion retailers have looked to the emerging markets for expansion and many have had significant successes in these countries.

[1] 'Specialist Apparel' excludes luxury retailers, department stores, standalone footwear and variety stores

It is difficult to define exactly which countries are considered ‘emerging’ economies at any given time since inevitably global economics are transient, however the key nations typically considered part of this sector are the so called BRIC nations of Brazil, Russia, India and China. The BRIC nations have consistently outperformed many developed European markets as well as the US market (Halpete, 2011). Other key emerging fashion retail markets of note include Turkey, Thailand and Mexico. It is predicted that by around 2025 emerging markets will account for 50% of the world’s total consumption, up from 30% in 2013 (Interbrand, 2013), so these are the fashion retail markets of the future and many western fashion retailers have interests in international expansion into these countries. Those retailers which have expanded into emerging markets have seen revenue growth rates 2.5 times faster than in their domestic markets (Interbrand, 2013). However, despite the positive commercial indicators, expansion into these retail markets can be challenging. Whilst operating in a domestic market, retailers generally have a good understanding of their market environment and thus what shapes consumer behaviour, but when moving into any new market, the market environment can be very diverse for example in terms of geographic spread, cultural diversity, language, technological innovation, infrastructure, political stability and cultural factors (particularly when related to fashion) (macro environmental analysis is discussed in section 3). Despite the rapid expansion of fashion retail in each of these markets, academic research on the subject is sparse.

China

China is one of the world’s fastest growing and biggest economies and currently has a GDP of just over $9 trillion, second only to the USA (World Bank, 2014). It is not only the growth and size of its GDP which makes China an attractive retail market, but also the size of its population which stands at approximately 1.3 billion people (CIA World Fact Book, 2014), although it should be noted that whilst the growth in consumerism of this market has resulted in a rapidly growing middle class of wealthy consumers, much of the population lives in poverty. The rapid economic growth is also vastly different from region to region and city to city, and despite the relaxation of regulation, there remain many hurdles in bureaucracy and business practices which can make doing business in this market risky. However, China remains the world’s single most promising market for growth in fashion and luxury retailing, and is set to be the main engine for growth in the worldwide fashion market according to McKinsey (Apax Partners, 2011), and therefore many retailers see entry to this market as a risk worth taking.

Retail expansion of foreign fashion retailers into China had been slow, despite the rapid growth of the economy. This was largely due to the heavily regulated business ownership laws which were relaxed in the 1990s allowing for direct foreign ownership and paving the way for a flurry of retail expansion into the Chinese market (Halpete, 2011). Foreign fashion brands are particularly attractive to wealthy Chinese consumers keen to display their new found wealth by wearing foreign brands which tend to be associated with the ‘wealthy west’ (Fernie and Perry, 2011). China is one of the world’s biggest markets for luxury goods and even during the global recession, demand for luxury products in China continued to grow very significantly (Halpete, 2011; Bonetti, 2014).

Retail formats in China are similar to those in most western markets with a mix of department stores, specialist, variety, discount and online stores in high street or mall locations (Halpete, 2011). Western retailers used a strategy of market entry via high end hotels in the early days, for example in the foyer of the best hotels in the biggest tier 1 cities. However as expansion of foreign retailers has gathered pace and new modern shopping malls have opened, there is significant growth in stand-alone stores. The exciting pace of retail expansion is reflected in the scale of the stores being opened and some of the world's most innovative, expensive and high-tech stores can be found in China, and in particular, flagship stores have been used as a key market entry method via the top tier cities (Bonetti, 2014).

Brazil

Brazil is an emerging economy that has grown rapidly in the last 15 years and has so featured considerable stabilisation in political and economic terms, as well as a narrowing gap between rich and poor. Overall wealth levels across the population have improved and unemployment is steadily decreasing (CIA World Fact Book, 2014). It is now the 7th biggest economy in the world (World Bank, 2014) and has a large population of 202 million (CIA World Fact Book, 2014). There are growing numbers of wealthy young consumers fuelling a significant demand for fashion retail and it is worth noting that the per capita spend on fashion is six times higher than that of the per capita spend of Chinese consumers (Halpete, 2011).

Despite interest from foreign retailers, small independent stores continue to dominate Brazil's retail landscape, particularly in the middle market, although as foreign expansion increases, modern retail formats are becoming more common (Halpete, 2011). Foreign apparel retailers such as Zara and Timberland tend to have a higher market position in the Brazilian retail market and are perceived as 'upmarket' and only accessible by the wealthiest consumers (Halpete, 2011). At present the modern retail formats are few and far between. Department stores are virtually none existent in Brazil, which is based largely on traditional retail formats such as street markets and small middle market independent stores, which are typically small scale, and often family owned entities, although there is growing consolidation in this sector (Pinto and de Souza, 2014). However there are growing numbers of modern shopping malls and the fashion retail sector is ripe for consolidation of specialist multiples (Halpete, 2011). The Gap, Zara, TopShop and Forever 21 have all entered the Brazilian retail market.

Whilst Brazil remains an attractive fashion retail market, there are issues with regulation, particularly protectionist regulations, high levels of consumer debt and significantly diverse cultures across the country. It is also worth noting that the fashion seasons are opposite to most of the other large global fashion markets which poses logistical and planning challenges for fashion retailers (Apax Partners, 2011). There is a growing interest in fashion in Brazil and a number of local designers and fashion brands have emerged in the market as well as key events such as Sao Paulo Fashion Week (Pinto and de Souza, 2014).

India

India is considered a highly lucrative retail market and has the largest number of retail outlets in the world (15 million outlets) (Halpete, 2011). Its GDP is the tenth largest in the world (World Bank, 2014) and it has a very large, young population (average age of 25) who enjoy shopping (Halpete, 2011). Of course there are a large number of retail outlets but much of the retail sector is fragmented and unstructured, only about 6% of retail in India was ‘organised’ retail in the mid-2000s (Basu *et al.,* 2014), but the entrance of foreign retailers has meant the organised retail sector is enjoying significant growth, and in particular the mall sector is very popular in India (Halpete, 2011), although to date, organised retail structure has only firmly established in the top tier cities (Basu *et al.,* 2014) but organised retail is forecast to grow to around 20% of the total market by 2020 (Malik, 2013). Foreign retailers with presence in India include Next, Zara, Levis and there are also a number of strong domestic retail multiples such as Pantaloon and Fab India (Basu *et al.,* 2014). The sector remains heavily regulated by the Indian government and there are strong protectionist measures, although deregulation is taking place slowly (Halpete and Seshadri Iyer, 2008). Department stores and variety store formats tend to be dominated by domestic retailers in India, with foreign fashion retailers tending towards the specialist stand-alone multiples, many of which are located in the modern shopping malls (Mann and Byun, 2011). Modern retailing in India is characterised by the development of huge sprawling malls and shopping complexes incorporating entertainment and social spaces (Malik, 2013).

There is significant growth in the richer classes and a shrinking of the proportion of poor in the Indian population (Mann and Byun, 2011). In line with other emerging markets, Indian consumers view fashion consumption as a way of conveying their status and thus fashion retailing is predicted to continue with strong growth in India (Das, 2014), however one of the key challenges for fashion retail in India is how to present product ranges which satisfy the desire for western styles within the constraints of what is considered culturally acceptable (Khare *et al.,* 2012; Mann and Byun, 2011). The shift in demand towards western styles has been a recent phenomenon and in 2005 only around 20% of total apparel sales were from ready-made clothing (Halpete and Seshadri Iyer, 2008), although this is growing at a rate of nearly 50% per year (Malik, 2013).

Infrastructure in the Indian retail market is poor and the country has huge diversity in terms of wealth, culture, religion and language (Mann and Byun, 2011; Halpete and Seshadri Iyer, 2008). There is a growth in affluent consumers driven by increasing numbers of professional jobs, mainly in the first tier cities, and increasing numbers of women in the workplace, fuelling demand for modern work wardrobes.

Russia

Russia is another emerging economy which has seen significant growth in consumerism following political and economic reform in the early 1990s which paved the way for the development of a market economy. Russia has a large population of nearly 1.5 billion (CIA World Fact Book, 2014) and has the 8th biggest GDP (World Bank, 2014), and is Europe’s largest consumer market. Retail in the Russian market is highly fragmented (Lorentz and Lounela, 2011) and the market is characterised by issues with corruption, infrastructure problems, high taxes and red tape (Halpete, 2011). There are a number of strong domestic apparel chains mainly serving the middle market. As with other emerging markets, the biggest proportion of apparel sales currently comes from traditional retail formats such as street vendors and local independent stores, however there is significant growth in modern retail formats of all types such as department, stores, specialty stores and online (Halpete, 2011). The retail structure in the large cities such as Moscow and St Petersburg are highly evolved and similar to any established retail market, whereas the smaller cities are in the earlier stages of retail development (Lorentz and Lounela, 2011).

Growth in apparel retailing is growing exponentially in Russia as a result of increasing customer demand from increasingly wealthy consumers and the entrance of foreign retailers (Halpete, 2011). The 2008 recession hit the Russian market and a number of luxury retailers exited the market, however as confidence grows many foreign retailers who had exited are now looking to re-enter, and those who stayed are looking to expand. However, current forecasts for growth in the Russian market are modest as inflation and taxation hits consumers (Deloitte, 2013), and the most recent turbulence of 2014 looks set to destabilize the region and possiblly impact fashion retailing in the region.

Following years of communism where consumerism did not really exist in this market, Russians are now eager to consume anything and everything, with foreign brands being especially desirable since in the minds of these consumers they represent everything about the move away from communism. Fashion tastes in Russia vary enormously with consumers in western Russia typically preferring a Scandinavian style of dress compared with consumers in the East of the country preferring bright colours and accessories (Halpete, 2011).

2.3.4.2 Developing Economies

A developing market economy is defined as one which has a low to middle per capita income (Halapete, 2011) but demonstrate growth factors significant enough to suggest they will quickly become emerging markets. According to global retail consultants AT Kearney, the top developing economies in terms of growth and market attractiveness include Chile, Uruguay, United Arab Emirates, Armenia, Georgia, Kuwait, Malaysia and Kazakhstan in their top 10 (AT Kearney, 2014). AT Kearney determine developing economies as those with growing consumerism and middle classes with a desire to move from fragmented and traditional retail formats to a more organised approach, supported by governments’ relaxation of regulation and a desire from consumers to buy foreign brands (AT Kearney, 2014).

This section has evaluated the established, developing and emerging fashion retail markets. The analysis demonstrates a clear link between the development of a market economy creating demand for foreign brands and the entrance of foreign fashion retailers into these new markets which represents a shift from fragmented and informal retailing formats to the more organised retail structure which is the norm in the established fashion retail markets.

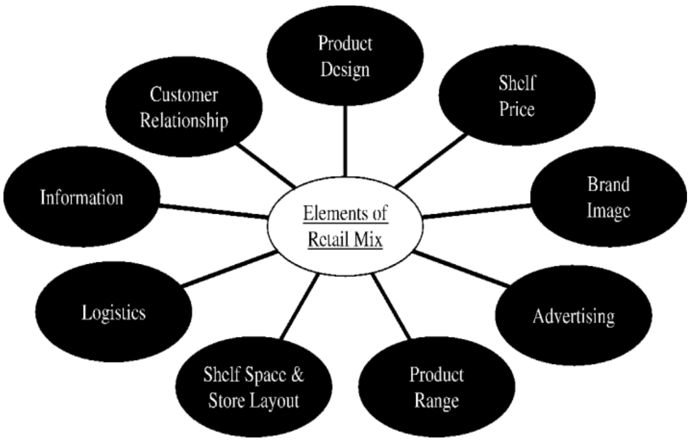
3. Introduction to The Retail Marketing and Marcomms Mix

The next section details the elements of the retail marketing mix which are the various elements and methods required to formulate and execute a retail marketing strategy. As evident from the previous section, fashion retailing has become a global industry and competition has exponentially increased therefore details of the key methods adopted in order to differentiate from competitors are further discussed. Following analysis of the mix this section will go into further depth regarding the Marcomms mix; according to Keller (2009) the pace of change in the marketing communications environment has been so rapid, it has been difficult for marketers to keep pace, technology has offered new opportunities to manage their brands and continue to reach the consumer in a relevant, appropriate and cost effective way. The key marketing methods to utilised by fashion retailer are later discussed.

3.1 Retail Marketing Mix

The retail marketing mix can be defined as, 'T*he total package of goods and services that a store offers for sale to the public. The retail mix, then, is the composite of all effort which was programmed by management and which embodies the adjustment of the retail store to its market environment*,' Lazer and Kelley (*1962*)

The general aim of a retailer is to create an offering that is relevant to a defined target market and is attractive to customers based on the variables of price and performance (Kent and Omar 2003). Retail marketing strategy is closely related to more general marketing strategy and works from a similar base (McGoldrick 2002), however certain elements of the retail industry dictate that the standard 4 P marketing framework (product, price place and promotion) is not sufficient as it concerns itself with product; for the retail industry the focus needs to be market orientation which requires a more detailed framework, and therefore an adaptation of the 4 Ps model which goes beyond the product orientation of the 4 Ps (Gronroos 1994). There are a number of specific elements to the retail mix that have been detailed by academics (Wigley and Chiang 2009), and will be discussed throughout this section. The model below highlights some of the detailed areas of the Retail Mix (McGoldrick, 2002) and is used to examine some of the changes that have taken place within fashion retail.



Source: McGoldrick (2002)

Compared to fifty year ago, changes in the retail mix are evident in for example, product design, where retailers have much greater influence over what is stocked and at what price it is sold (Kent and Omar, 2003). Another change is that brand image has become more important, as retailers have become powerful brand owners and influencers in their own rights (Ailawadi and Keller 2004). Additionally the increase in the acquisition of consumer data from a variety of sources including product purchasing and behavioural data has enabled retailers to focus on the customer relationship and how this can be built and developed to increase profit and loyalty. (Yarrow and O'Donnell 2009)

A more in depth look at each element of the retail marketing mix is undertaken below considering place, product, price and promotion and in addition other key aspects of retailing. The 4 P's model can be extended to include people, process and physical evidence (Jackson and Shaw 2000) and it is noted that in retail people are critical to the execution of strategy as they are the brand representatives who meet consumers. Gilbert and Times (1999) define three basic tenets of the marketing mix in that it must be executed to meet the needs of consumers, there must be an effort to create a uniform message or 'synergy' through promotions and other elements and the marketing mix must be created in a way that allows the retailer to adapt and respond to the competitive market place.

3.1.1 Place - Retail Location

"You can be the best retailer in the world, but if you set up your shop in the wrong place, you'll never do much business. If you operate from the wrong properties, you start with your hands tied behind your back."
George Davies, fashion Brand Designer and Retail Consultant cited in Clarke and Rowley 1995

Possibly the most critical element of the retail mix is place or location which has become ever more vital as the retail sector has grown (Reynolds and Wood 2010); however McGoldrick (2002) states that on its own a good location will not suffice and certainly does not make up for other areas of the retail mix that are weak. Additionally (Bell and Lattin 1998) found that given the change in consumer's lives and the development of out of town style shopping, there appears to be preparedness for consumers to travel, perhaps making place less important than a truly compelling retail offer. Interestingly in a time when many consumers are focused on price, it could well be this factor that influences where consumers shop. Some of the value retailers, in particular Primark and Matalan highlight this fact; their stores not always being in prime locations but still being successful in attracting visitors despite their store design, atmospherics and overall shopping experience. Reynolds and Wood (2010) have researched place and location as strategic tools; being in the right place with other similar retailers impacts store traffic and customer types and therefore similar retailers have benefitted by being located near to each other (Teller and Reutterer 2008). The opportunity to share surroundings and co-operation between retailers can enhance each retailer's performance (Brandenburger and Nalebuff 1996); however the requirement is that each retailer has to be able to compete with the others on their own merits, or otherwise risk losing out to the competition. Store rationalisation is likely for a number of retailers as the move towards multichannel continues apace. (Drapers 2012), meaning that location for the key remaining store is ever more important. Making location decisions is critical to retailer success and growth and an extensive list of factors is considered before stores are finally built. The use of GIS data is frequently used in this area, enabling decisions to be made on social and economic status of the chosen location. Other techniques for selecting store location include instinct of the retailer and sales data from other stores in similar areas. Evidently retailers do not have free reign in their choice of location as planning restrictions are rife in order to protect the environment and other key local issues (Kent and Omar 2003).

3.1.2 Product (selection and buying)

Fashion retail is a dynamic and competitive market and product competition has never been greater. Product competition has never been greater; selling the right product at the right price is critical, and has become more challenging due to retailers speed to market and own brand developments from international retailers entering the UK market. In addition the retailers have to anticipate and translate trends for their customers; a challenge that is ever present and critical to profitable trading (Bruce and Daly, 2006). The difficulty for retailers in anticipating and translating trends for their customers is challenging (Bruce and Daly, 2006) and as many retailers now offer an element of fast fashion, homogeneity has reappeared in the market and retailers need to seek new ideas in order to attract customers to their stores. Overall this has led to consumers having an over-supply of choice with insufficient differentiation and distinction between retailers (McGoldrick, 2002). Added to customer demands, seasonality is a key factor in changing fashion ranges quickly (Christopher *et al.*, 2004) leading to ever shorter opportunities for retailers to actually sell the products they have in store. Furthermore a key issue for fashion retailers is the area of product quantity where ordering the correct stock is critical (Michaelidou and Dibb 2006). In addition to the requirement of product assortment within ranges, different colour ways and sizes are also required and from a logistics perspective the variety of sourcing opportunities and complications of dealing with distant suppliers (Kent and Omar 2003) make it difficult to achieve the goal of the right product at the right time; a way of overcoming this is RFID which is discussed in 4.4. In terms of product development, retailers are now heavily involved in specifying product requirements as they have to protect their brand reputation, especially if the brand positioning is linked to a specific level of quality or design input. It has been demonstrated that those retailers with a ‘positive design input’ have a higher valuation (Hertenstein and Platt 2001). Product is critically linked to brand perception, the quality of a product also ties to its price and is therefore key in ensuring sales and profit are maintained (Kent and Omar 2003). Keller (1993) discusses the importance of brand image for the consumer, which links closely with product design and quality and the brands that a retailer sells. Successful fashion companies that have embraced technology and challenged outdated ways of work thrive in this competitive marketplace; indeed Zara exemplify how to meet the needs of the consumer through improved supply chain and stock management (Tokatli 2007).

3.1.3 Retailer branding

Retail branding is an under researched area (McColl and Moore 2011) and differs in many ways to traditional product branding; however as Keller (2007) states retailers can attach ‘unique association’ to their service quality, the products they offer and a variety of other retail variables such as price, merchandise and physical stores in the same way that they can be attached to products. A retail brand identifies the goods and services of a retailer and differentiates them from those of competitors, (Hoeffler and Keller 2003) and ‘brand equity’ is created when marketing and promotional activity attracts a more favourable response from consumers than occurs with the marketing activity of other retail brands. This leads to the creation of retailer image in the consumer’s minds and hence leads to increased brand equity. According to Ailawadi and Keller (2004) retail brand image is also affected by the manufacturer brands that are sold in store, and the equity attached to those brands. It is clear that the use of manufacturer brands in retail stores can encourage, *“consumer interest, patronage, and loyalty in a store”* (Ailawadi and Keller 2004 p.4) as the brands stocked help to add to and enhance retailer image and build credibility, contributing to image and retailer brand positioning in the marketplace. This relates directly to the fashion retailers being considered in this research as each of them sell to varying degrees either manufacturer brands or in the case of Marks and Spencer very strong own brands which have equivalent authority. Notably as retailers strive to retain customer loyalty and seek new customers Wallace *et al*, (2004) note that a multiple channel strategy is one way of building customer loyally to a retailer's brand. It is also of note that consumers are becoming brand aware at a younger age than ever; research shows that this frequently happens between the ages of 15 and 25 (Taylor and Cosenza 2002) and it is recognised that young consumers have the ability to influence brand choice, particularly in clothing, whether that is through direct choice or influence of parents (Hogg et al. 1999). Retailers therefore in many cases seek to attract younger customers to their stores with the intention of building a life-long relationship with them.

3.1.4 Retail own brands

In the past 20 years fashion retail in the UK has changed beyond recognition and has become more responsive and exciting due to consumer demands. In fashion retailing the own brand has triumphed in the high street with successful retailers such as Topshop and Zara selling garments under their own names having created a strong and desirable retail brand image (Tungate, 2005). Alongside these larger retailers newer more niche own labels have evolved and the lifestyle sector of this market has grown exponentially with retailers such as White Stuff, Fatface and Joules demonstrating outstanding brand development in higher price fashion merchandise. These own brands have become recognised for their market position and demonstrate how own brands transform businesses and become an integral part of business success and value (McColl and Moore 2011). The implication of strong own brands and their effect on the corporate brand image (Ailawadi and Keller 2004) cannot be underestimated as this development has led to a number of critical aspects for retailers to control; namely store design (Berman and Evans, 1995), product quality, price and uniqueness (McColl and Moore 2011).

3.1.5 Retail Pricing

In the ever more competitive fashion retail environment price has come to the fore; its importance to consumers has grown stronger as the recession has worsened and fashion retailers seek to attract customers to their store rather than lose them to another retailer (Carpenter and Moore 2006). Where homogeneity is commonplace price often becomes the deciding factor in a purchase (Mintel 2010). However for fashion retailers there is a delicate balance for price; low enough for consumers to see value and high enough to ensure that a degree of quality relevant to the retailer is maintained; not too high however that customers seek a similar garment elsewhere (McGoldrick 2002). Related to this concept, it is the task of retailers to assess the impact of price and price changes on a number of areas including brand image and ultimately the financial performance of the business; the aim is to protect profits and market share (Borghini *et al.,* 2009) It is clear that price has become critical for consumers in the wake of the recession, and although consumers still want to buy fashion they are not prepared to pay the prices that they have done previously (Verdict, 2012). Retailers have also faced a number of changes that have affected their ability to sell garments at low prices; the rise of fuel prices, cotton and labour had a great impact upon purchasing power and cost prices rose (Mintel 2010). There has been little change in this trend of consumers wanting to pay less; as the number of promotional campaigns, price reductions, sales and discount days are prominent in the fashion sector (Mintel 2012). Retailers need to examine the impact of promotional activity across the year and especially during the critical trading period, as margins are eroded when mark downs are used in an attempt to lure customers into store and encourage spending; the aim being to achieve volume of sales, rather than profit. This is vital in terms of protecting market share as fashion is easily replicated and a similar item can often be bought elsewhere at a lower price. The future depends upon building strategies that will move fashion retailers out of cheap prices and reduced prices into a more sustainable pricing strategy as the UK comes out of recession (Verdict, 2012). An attempt to reverse the pressure on margins by holding prices firm instead of offering numerous discounts is critical if brand values are to be maintained, as it will become vital for retailers to promote brands in an effort to encourage consumers to spend more.

3.1.6 Retail service

Retail service is a vital part of the retail mix and it is clear that the shopping experience becomes more enjoyable for the customer and more profitable for the retailer when staff are well trained and understand the consumer (McGoldrick, 2002). It has been proven that staff interaction with customers, alongside the physical appearance of store personnel can enhance the shopping experience and this, combined with store policy, creates the strongest impact on consumers (Siu and Cheung 2001). Sum and Hui (2009) agree regarding the importance of the sales person stating that it is the empathy of the sales person that is critical. Patterson and Baron (2010) found that with specific reference to department stores, customers, and in particular younger customers, have poor opinions of retail staff. Academic research has demonstrated that sales personnel are critical to the store experience and indeed these factors also help customers to decide whether they will return to the store. Jackson and Shaw (2008) agree with the notion that the shopping experience can therefore create competitive advantage for the retailer. Mary Portas (2011) discovered that although it is recognised that service is critical to retailer success, in practice this is not the case for many retailers. She concluded that the service industry has become *"a faceless couldn't-give-a-monkey's business"*. It is apparent that poor customer service is rife, perhaps due to retailer's budget constraints for staff training and perhaps due to a lack of understanding about what most customers expect from a retail store. Retailers must be aware that poor sales staff often equate to poor product perception in the minds of the consumer (Sweeney *et al.*, 1997). It is likely that retailers will need to focus closely on service as the UK comes out of a recession, as this is clearly linked to product perception and ultimately affects the price a customer is willing to pay.

3.1.7 The Selling Environment

Fashion retail behaviour is often hard to anticipate because consumers frequently shop in an uncontrolled manner, with impulse purchasing a strong behavioural characteristic (Christopher 2004). The selling environment is therefore critical to get right as although location is important in its own right it has to be supported by the right selling environment. This means an environment that brings the brand to life, one that draws consumers into the store; this is the main opportunity that consumers have to experience the brand, so it is vital that it is well executed and meets consumer expectations (Easey 2009). The importance of store environment is evident in the literature, (McGoldrick 2002, Wigley and Chiang 2009) and there are a number of elements which create the environment specific to each retailer (McGoldrick, 2002). Kerfoot *et al.*, (2003) discuss the communication aspects of the environment that are created by the physical nature of the store; the way in which products are displayed for example is done with the aim of ensuring the selling space is maximised and customer interest is converted into sales across as many products as possible (Buttle 1984). Certainly in fashion this presentation is critical (Jackson and Shaw 2008), this is supported by (Lea-Greenwood, 1998; Kerfoot *et al.,* 2003) who note that fashion retailers have made significant investment in both visual merchandising and overall store design to enhance the shopping experience and ultimately encourage customers to spend time in store and purchase at the end of their visit. It is vital for retailers to create an environment to achieve this. Emotional response to the retail environment has been measured through the dimensions of 'pleasantness, arousal and dominance' by Russell and Mehrabian (1974) whose S-O-R (Stimulus – Organism – Response) model examined consumers' emotional reactions to the store environment. This is important as the positive impact of store environment is often extended visit times and increased purchase levels. (Machleit and Eroglu 2000; Grewal *et al.,* 2003). Current economic trends have perhaps lead to a decrease in the importance of the store environment for some consumers as they perceive price to be the most important deciding factor and are less influenced by the selling environment; indeed Becerra and Korgaonkar (2011) state that alongside price it is brand or product and retailer that have the strongest impact upon actual purchase. UK fashion retailers have become adept at acquiring information about their consumers and match consumer's needs to the design of the store. However conversely it is the nature of retail to sell and often consumers are over stimulated by too much merchandise to be able to clearly see the offer. This placement of product is done in conjunction with store layout design to attempt to manoeuvre the consumer through the store (Grewal *et al.,* 2003). Due to economic constraints most retailers will adhere to a standard style of store layout where the individuality for the store comes from branding schemes and visual merchandising. It is the combination of layout and offer, matched to the target customer that facilitates brand buy in, getting this combination right is key as it this is discussed further in section.

3.1.8 Retail promotion

The use of the term "promotions mix" has been common since the 1970's and has since been adapted by academics and practitioners to include a vast range of varying advertising and promotional tools. The term is interchangeable with 'The Marketing Communications Mix,' (Marcommms mix) which describes more clearly the role of promotion (Pickton and Broderick, 2005) and will be used in the next section 3.2. In recent years the components of the Marcomms Mix (Baack and Clow, 2012) have increased further due to the change in technology and the opportunity that the internet in particular has opened up for consumers and businesses to use.

3.2 The Marcomms Mix

Solomon (2010) defines the Marcomms mix as advertising, sales promotion, direct marketing, public relations and word of mouth, however a more recent grouping of the Marcomms tools has presented them in a clear way with a distinction between traditional media channels and new channels such as E-active Marketing or Digital Media and Alternative Marketing; alongside other disciplines such as advertising, public relations, sales promotion, direct response, word of mouth and personal selling (Baack and Clow, 2012; Moriarty et al 2012). The availability of new media channels, in particular the internet has allowed fashion businesses to develop their Marcomms strategies and increasingly become global players very rapidly. In addition fashion retailers have specific tools which are critical to the fashion Marcomms mix (Jackson and Shaw 2008) and are discussed below.

3.2.1 Media Clutter

Looking at the large number of tools it is easy to understand why, with so many ways of reaching the consumer, the media environment has become cluttered. Consumers see up to 5000 messages a day and are constantly bombarded by promotional efforts (Wright *et al.,* 2010). Many consumers feel that the increase in the number of messages targeted at them across every type of medium is overpowering and this can lead to an active avoidance of messages (Petrecca 2006); obviously this indicates that money spend on promotion could be wasted. This "cluttering" of media channels is defined by Ha (1996) as 'amount of advertising space in a medium'. Further research suggest that the effect of clutter is that it is lowering consumers attention levels, impediment of recall of the advertisement and having a negative impact upon consumer's cognitive response (Moorthy and Zhao 2000).

3.2.2 Marketing Communications Objectives

Marketing communications objectives must be clearly defined: McGoldrick (2002) states that for a fashion retailer they should be to *"Increase expenditure from existing customers, increase store traffic, increase product sales and develop store image"*. Additionally for a fashion brand; *"Building brand equity, creating favourable attitudes towards the brand and maintaining the strength of unique brand association"* (Keller et al. 2008a). Indeed Keller (2007) acknowledges that retail brands can become strong brands in the minds of the consumer when 'unique associations' become attached to the retail brand. Baack and Clow (2012) summarise objectives in more detail below:

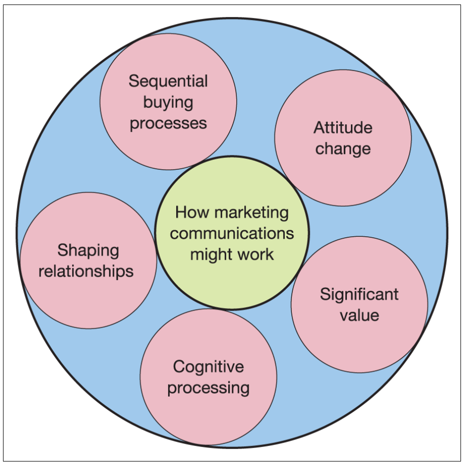
Table 3. Marketing Communications Objectives

• Develop brand awareness • Increase category demand • Change customer beliefs or attitudes • Enhance purchase actions • Encourage repeat purchase	• Build customer traffic • Enhance firm image • Increase market share • Increase sales • Reinforce purchase decision

Source: Baack and Clow 2012

Table 3. covers a wider range of objectives that can be achieved by using a mix of Marcomms tools, the aim being to ensure that the tool chosen can deliver the required objective in the correct combination. The following section covers the key Marcomms tools that are used in fashion retail. More broadly the purpose of Marketing Communications is outlined below by Fill (2013)

Figure 6. How Marketing Communications work (Fill, 2013)



Source: Fill, 2013

3.2.3 Key Marketing Communications Tools of Fashion Retailers

Whilst the main Marcomms groupings are acknowledged above there are key tools used within the fashion industry that have equal importance (Easey 2009). A brief examination of each will follow:

3.2.3.1 Advertising

Advertising is defined as *"any paid form of non personal presentation and promotion of ideas, good or services by an identified sponsor"* (Keller et al. 2008 p.235) and for many categories has been the dominant communication channel and many brands still rely on it. However advertising in fashion is low in relation to other product categories, reflecting lower spend on fashion than leisure or food (Easey 2009). Large fashion retailers such as Marks and Spencer (M&S) have used advertising rather sparingly in the past, however in recent years M&S have become the largest spender in the sector (Mintel 2011). In the era of new technological advancement in communication and the changing environment, advertising can still play a strong role but there will usually be a number of other tools used to create a campaign that can develop brand equity (Keller 2009). Advertising is associated with mass media such as television, press, cinema, posters and radio and is still deemed to be an important contributor to building brand image in terms of *"selling the establishment, attracting customers to the premises, [and] selling goods"* (Jefkins and Yadin 2000 p. 41). Table 4 shows fashion retail spend on advertising in the UK in 2012. This shows M&S as the clear leader in terms of spend and also indicates where retailers are increasing spend including large international retailers such as H&M and smaller UK businesses such as Shop Direct. Conversely Next and New Look have reduced advertising spend; perhaps some of this spend has been redirected to online activity or invested elsewhere in the business, which often happens in times of difficult trading. Many companies see advertising as a moveable feast or budget that can be cut or reallocated in difficult economic times (Shimp, 2000).

Table 4. Retail advertising and promotion (Mintel, 2013)

Clothing Retailing - UK - October 2013 - Retail Advertising and Promotion					
	2009	2010	2011	2012	% change
	£	£	£	£	2011-12
Marks and Spencer	5,173,168	21,576,004	26,004,073	23,936,232	-8
Asda Stores Ltd	7,095,211	7,607,885	7,970,176	8,973,406	12.6
Tesco Plc	5,373,454	5,393,779	7,218,784	8,435,966	16.9
H&M Hennes Fashions	4,696,392	6,046,466	6,712,501	8,169,787	21.7
Next Plc	6,536,537	5,083,879	7,608,691	7,363,222	-3.2
Shop Direct Home Shopping Ltd	858,919	2,405,483	1,843,698	6,881,210	273.2
Debenhams Plc	91,586	843,405	6,714,453	6,218,237	-7.4
TK Maxx	1,705,495	2,287,300	6,678,148	4,428,147	-33.7
New Look Fashion Stores	2,933,470	5,069,622	6,834,490	4,112,025	-39.8
Clarks International Ltd	1,962,048	5,416,281	5,578,475	3,191,813	-42.8
River Island Clothing Co Ltd	64,244	31,031	678,606	2,781,507	309.9
Redcats UK	337,940	642,387	665,185	2,512,792	277.8
Burberry Ltd	1,477,795	1,267,351	1,278,115	2,510,664	96.4
Sainsbury’s Supermarkets Ltd	1,652,597	2,228,235	4,135,972	2,150,240	-48
Matalan Ltd	2,760,346	2,324,689	3,367,665	1,996,525	-40.7
JD Williams and Co Ltd	215,349	940,233	707,271	1,856,655	162.5
Levi Strauss UK Ltd	425,446	674,306	1,454,350	1,476,345	1.5
Gap Europe Ltd	291,658	493,811	195,003	1,469,740	653.7
Esprit Unisex Fashions	40,549	31,262	632,257	1,402,022	121.7
Uniqlo	1,673,534	1,546,438	1,026,226	1,334,812	30.1
Bonmarche	518,774	22,452	23,630	1,332,598	5,539.40
Mango Retail	419,808	606,940	1,120,793	1,297,890	15.8
Hugo Boss Fashions	677,000	1,001,549	1,310,187	1,205,657	-8
Rohan Designs Ltd	340,693	897,923	1,478,293	1,191,783	-19.4
John Lewis Partnership	1,849,235	1,474,719	1,518,843	1,155,810	-23.9
Tommy Hilfiger	421,020	1,544,017	1,047,624	809,543	-22.7
Bhs British Home Stores	162,561	214,545	110,277	808,779	633.4
Dorothy Perkins	1,146,081	1,151,067	1,136,718	807,231	-29
House Of Fraser Plc	1,532,065	1,255,455	1,103,151	778,015	-29.5
French Connection Group	587,907	1,641,385	1,421,587	714,809	-49.7
Total of the above	53,020,882	81,719,899	107,575,242	111,303,462	3.5

Table 5. shows in more detail how retailers spend their marketing communications budgets across media type. For most fashion retailers press is a key media vehicle.

Table 5. Main Media Advertising Spend, by Leading Clothing Retailers, 2007-10 (Mintel, 2011)

Retailer	Direct mail	Internet	Outdoor	Press	Radio	TV	Total
	%	%	%	%	%	%	%
M&S	2	2.1	12.1	38.3	2.2	43.2	100
JLP	3	4.4	0.6	49.2	2.2	40.1	100
Debenhams	24.3	1.2	0.2	45.8	12.3	15.3	100
Matalan Ltd	41.9	1	15.6	18.9	9.4	13.1	100
Next	9.4	0.1	0.1	47.8	0	39.2	100
H of F	45.9	1.2	0.9	38.2	6.6	7.1	100
TJ Hughes	0	0	0	97.9	1	0.2	100
BHS	41.2	0	0.1	9.8	3	45.9	100
H&M	0	3.5	61.4	33	0.4	1.7	100
TK Maxx	0	2.6	5.4	60.4	4.5	27	100

It also demonstrates the heavy use of TV advertising by John Lewis and Marks and Spencer in particular**.**

3.2.3.2 TV Advertising

It is understandable that large general fashion retailers such as Matalan, T K Maxx, Marks and Spencer and John Lewis use television advertising as part of their communications strategy as not only does it reach a large volume of people, it also has the power to create conversation in the media and the general public about the advert, especially if the advert is particularly strong or poor. Despite changes in consumer behaviour and in technology, TV advertising continues to be powerful with regard to brand building (Heath and Hyder, 2005). Indeed the combination of TV advertising and social media can create additional coverage for example views online, an example being consumers viewing youtube for the John Lewis advert totaled 4 million over the TV campaign period, which is a outstanding result and one that essentially broadened the reach of the TV campaign considerably.

3.2.3.3 Press advertising

Press advertising in magazines is still a key channel for fashion retailers to use to promote their ranges and offers. Although press also incorporates newspapers and brochures, it is the glossy magazines from Vogue and Harper's Bazaar to Grazia that are tried and tested publications in fashion. Magazine advertising reaches consumers in subtly different states of mind, often consumers choose to read and engage with their magazine for relaxation and research shows that a strong and loyal bond to a particular titles can be formed (Moriarty *et al.*, 2012). Magazine advertising media rates are calculated by the size of the advert and its position in the magazine; more importantly the magazine circulation and readership are critical in both cost and advert performance. A clearly defined target audience helps media buyers to select the relevant magazine titles and this ensure that the message is received by the right people (Jackson and Shaw 2008).

3.2.3.4 Online advertising

The area of online marketing and advertising has grown dramatically in the last 10 years and is now an integral part of the marcomms mix for most fashion retailers from

Burberry, who exemplify use of this medium, to Topshop. The purpose of online marketing communications is to remind consumers about brands when they visit websites, deliver information in the form of online adverts, and offer enticements to other websites using banners and buttons. All of these are used to drive traffic to websites (Moriarty *et al.,* 2014). More fundamental however are the areas of internet search and consumer generated content. Internet search most notably through Google allows consumers to find products, brands, services and information. In addition consumers can also find product reviews. User generated content allows users to get closer to brands in the online space and have more personal contact between the two parties, engendering trust and repeat purchase (Chaffey, 2009), this will be discussed further in section 8.3.3 when reviewing social media.

3.2.3.5 Public Relations (PR)

"Public relations is a strategic communication process that builds mutually beneficial relationships between organizations and their publics" (PRSA, 2012). This definition includes the word strategic, meaning that PR is planned and executed in a structured and considered way (Seitel 2014). PR is a key tool for fashion retailers and entails 'managing the corporate identity' of a business which requires a number of tasks to be carried from ensuring press coverage of product to defending the business against any negative publicity that may occur (Easey 2009). Although control over some PR activities cannot always be guaranteed, mainly due to the editorial control of magazine journalists, PR can generate excellent media coverage at low cost. Other aspects of PR relate to exhibitions, event management, launch parties, fashion shows, and sponsorship tie ups, all of which require enormous amount of effort which often goes unrecognised, but which can in a stealth like and subtle way, really build brands and support advertising (Jackson and Shaw 2008). The use of social media within the PR mix has enhanced opportunities for fashion businesses to communicate with their publics even more cheaply through the use of Facebook, Twitter, bloggers and other tools to spread positive word of mouth about their brands; indeed this approach aims to embed the brand firmly in the consumer's life (Mangold and Faulds 2009), see section 8.3.3.

3.2.3.6 Celebrity Endorsement and Sponsorship

Celebrity endorsement is defined as *"Any individual who enjoys public recognition and who uses this recognition on behalf of a consumer good by appearing with it in an advert"* (McCracken 1989 p.6). Twenty percent of adverts in the UK use celebrities as their focal point, and this number is similar around the world (Halonen-Knight and Hurmerinta, 2010). Celebrities are used in a wide variety of advertising from TV to press and posters and their usage is successful in attracting attention and engendering deep brand attachment from consumers. Indeed the use of celebrities is done in order to use the power of the endorser to enhance the brand advertised thus leading to increased brand equity (Hollenson and Schimmelpfennig, 2013). This is achieved because all the attributes of the endorser are subsequently attached to the brand and powerful emotional feelings can be transferred (Keller *et al.*, 2008a). Many marketing managers seek to find celebrities to promote their brands as it is evident that the correct celebrity will attract attention from both consumer and media and create better brand recall and brand prestige (Schimmelpfennig and Hollensen 2014). As brand homogeneity has increased and consumers sometimes find it hard to discern between brands, this area of promotion has grown significantly in the last 10 years, and is recognised as a powerful element of the Marcomms mix as it can help advertising to stand out in a cluttered environment. The use of celebrities is likely to lead to the generation of PR coverage for the brands involved and can be used to reposition and launch new brands (Erdogan 1999) which is why it has become a key strategy for marketers to use. However the use of celebrities has positives and negatives mainly due to lack of control on behalf of the brand. Erdogan (1999 p. 295) summarises these:

Potential advantages	Potential hazards
Increased attention Image polishing Brand introduction Brand repositioning Underpin global campaigns	Overshadow the brand Public controversy Image change and overexposure Image change and loss of public recognition Expensive

Source: Erdogan (1999)

The issues linked to the incorrect choice of celebrity can impact upon the brand and Silvera and Austad (2004) confirm that it is critical to select the right celebrity for the product/brand and to make this relationship credible in the eyes of the consumer. Clearly as this type of promotion is expensive, choosing celebrities whose fame is evidently transient is inadvisable (Carroll, 2009). Some fashion retailers have found this to their cost, for example New Look's collaboration with Lilly Allen in 2011 was unsuccessful as at that point Lilly Allen was not sufficiently well known.

3.2.3.7 Sales Promotion

The key objectives of sales promotion are to stimulate consumer trial, to improve purchase or repurchase rate and to cement long-term customer relationships (Jackson and Shaw 2000).

Value-increasing (alters price/quantity or price/quality equation)	Value-adding (offers 'something extra' while leaving core product and price unchanged)
Discount pricing	Samples
Money-off coupons	Special features (limited editions)
Payment terms (e.g. interest-free credit)	Valued packaging
Refunds	Product trial
Guarantees	In-pack gifts
Multipack or multi-buys	In-mail gifts
Quantity increases	Piggy back gifts
Group buying	Gift coupons
Buybacks	Information (e.g. brochure, catalogue)
	Clubs or loyalty programmes
	Competitions/prize draws

Fill, 2013

The chart above shows the wide range of sales promotion activities available to retailers. In fashion, sales promotion is done in a variety of ways with the intention of attracting consumers in store and clearing stock. Activity is often executed through use of a coupon or voucher either promoted in press or online. It is a useful tool as it can be used short term to stimulate sales and retailers see immediate results when coupons are redeemed. It is used heavily over the key sales period of summer and Christmas, alongside mid season sales and stock mark downs, across a wide range of retailers from Gap to H&M. Driving store traffic and creating trial are two of the key advantages of sales promotion but too many offers can affect brand perception and ultimately change consumer behaviour; leading to customers who will not buy until there is an offer (Mintel 2012).

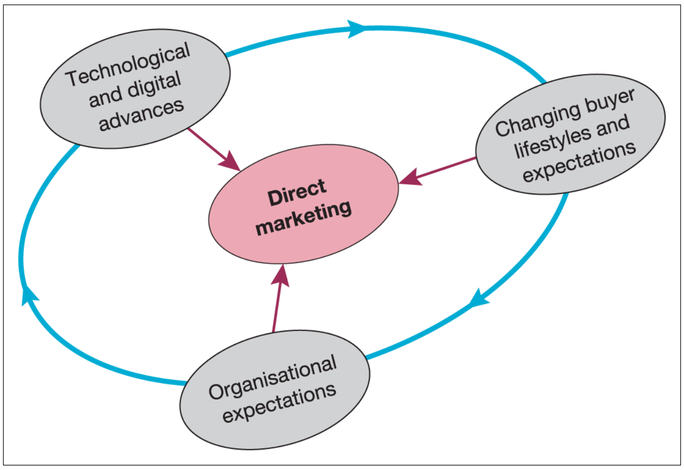
3.2.3.8 Personal Selling

In fashion the role of the sales person depends upon the nature of the store; the higher the price of merchandise the more sales involvement is usually expected. Involvement requirements also increase with the age of the consumer (Easey 2009). Many high street retailers have introduced personal shoppers into their stores to act as a guide and stylist for customers, the aim being that customers' spend increases and although Topshop was the first to take this approach on the high street many other retailers have followed.

3.2.3.9 Direct Marketing

Certainly in fashion as an image based industry, direct marketing has been seen as lacking status as a medium. It is however used by fashion businesses that recognise its power as a tool to support advertising. Certainly direct marketing has the ability to create a personal relationship between brand and consumer (Seitz 1998) and can recruit new customers and retain current customers. Many fashion retailers have become users of direct marketing through store card programmes and more recently the use of the internet to communicate with consumers, and this change in use has improved the image of direct marketing. Changes in the external environment (see Figure 7 below) have led to both an increase in direct marketing activity and a change in its image whereby many newer fashion brands use the medium across multiple channels. What often starts as web or store based contact with consumers develops further through direct mail, sending catalogues to entice customers to buy. Certainly fashion brands such as Boden, White Stuff and Joules have adopted this approach to create a personal approach to communication and their approach uses technological advancements in consumer insight showing an understanding of time constraints and changing buyer expectations. Many fashion retailers use direct marketing to excellent commercial effect, creating a strong brand dialogue with consumers (Easey 2009).

Figure 7. Changes in the external environment affecting Direct Marketing (Fill, Hughes and De Francesco, 2013)



Source: Fill, Hughes and De Francesco, 2013

The concept of lifetime value lies at the core of successful direct marketing and the key components of continuity, interaction, targeting and control all relate to this notion (Holder 1998).

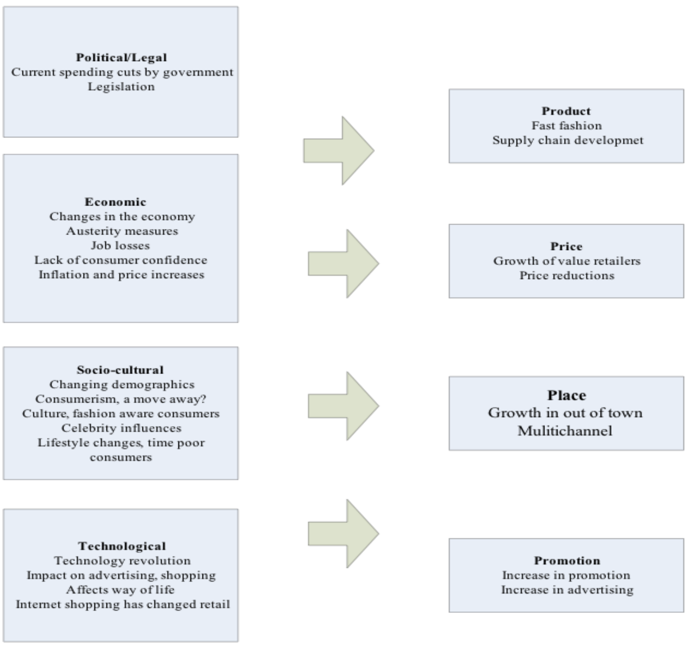
3.2.3.10 Visual Merchandising

Visual stimulation and communication have long been considered important aspects of retailing by practitioners and academics alike (McGoldrick, 2002). Visual Merchandising is defined as *"the activity which co-ordinates effective merchandise selection with effective merchandise display"* (Walters and White 1987 p.238), however Easey (2009) takes this further to incorporate the whole store experience with merchandise a part in that. Visual merchandising in fashion is a powerful tool and alongside store design, layout plays a large part in actually getting customers into store and in bringing the fashion experience and brand to life (Kerfoot et al. 2003) this is further discussed in section 7.4.1.

4. PEST Analysis of Fashion Retailing

All fashion retailers operate in a macro-environment i.e. they are affected by forces outside their control. In this section the wide and varied environmental factors affecting the fashion retail industry are discussed in more detail. The fact that these elements are often unpredictable makes it difficult for retailers to anticipate change, (Diamond, 2006; Bruce and Daly, 2007); however it is vital for retailers to monitor the external environment on a regular basis; even more so in the current economic situation. It is important to differentiate between macro and micro forces affecting the industry, macro being the wider issues such as economic and socio-cultural; micro being the forces which impact marketing strategy such as customers and competitors. The macros environment is generally considered to be made up of political/legal, environmental, socio-cultural and technological factors and often referred to using the acronym PEST.

Figure 8. PEST Framework and Impact on the Retail Marketing Mix



Source: Adapted from Mooradian *et al* 2011

The above framework (Figure 8); adapted for fashion retail, illustrates the wider external issues that retailers need to manage and understand, and demonstrates the impact of this upon the marketing mix. Some external factors are common to the whole of the market sector, such as political and economic; however other factors are related closely to the various consumer groups who exhibit different behaviour and consequently require varying levels of attention. For example the impact of technology varies across demographics and therefore the incorporation of technology into the marketing mix has to be considered in a different way to meet different consumer needs and expectations.

4.1 Political/Legal

The fashion retail industry has become a global industry with the majority of retailers operating on a worldwide basis as discussed in section 1.2. The impact of political and legal frameworks within which retailers have to operate in other countries is complex. All retailers have to adhere to the laws of the country in which they operate in terms of business legislation which protects both businesses and consumers but can often appear to be a barrier to success (Kotler *et al.*, 2010).

Political issues can relate to a whole variety of issues which can impact fashion retail, for example terrorism, war, revolution, strikes, extortion, confiscation, controls, currency restrictions, embargos, taxation etc. Legal issues can also have all kinds of influence over fashion retailing for example opening hours, waste laws, emissions etc. and of course the impact of both political and legal frameworks will vary significantly from country to country. In both cases, political and legal stability in a particular market can impact retail operations, consumer demand and exit costs (Sternquist, 1998). Of course political and legal issues can impact retailers indirectly via any aspect of their supply chain (Khan, 2013). For example the removal of the multi-fibre agreement as a result of global political agreements in 2005 had a major impact in terms of the amount of product retailers could source from China and ultimately played a great part in shifting world economics. Political and legal issues are often considered interchangeably since it is typically a government which controls regulatory frameworks (Lea-Greenwood, 2012). Lea-Greenwood (2012) explains the effect of this in the context of fashion marketing communications which can be 'self' regulated which is typical in developed economies, and very tightly controlled in other political and legal environments, such as China.

In the UK the government has an enormous influence on both the economy and the consumer, and the current austerity measures that have been implemented in an effort to reduce UK debt have led to increasingly difficult operating conditions for many fashion retailers. Indeed the current situation within the UK has been one of the driving factors for many UK retailers such as John Lewis and Marks and Spencer to seek growth overseas (2012). Legal restrictions in the UK can impact retail strategies such as flagship store development which is hindered in the UK by strict planning legislation.

Internationally, political stability is regarded as one of the key factors in consideration of expansion for fashion retailers. Political instability is perceived as a risk factor for fashion retailers and has inhibited growth in some markets (Lu *et al.*, 2011; Reinartz, 2011), for example some of the African nations. However, political dynamics can have the effect of making markets more attractive for fashion retailers, for example the changing dynamics of politics in Russia, whereby the stringent communist political control was relaxed in the early 1990s and enabled the Russian economy to grow and consumerism to increase (as discussed in section 1.2).

Government regulation is often cited as a key factor influencing retailer entry methods to a market (Lu *et al.*, 2011). For example government restrictions in many developing and emerging markets have impacted the potential for fashion retailer expansion. In the case of China and India protectionist measures imposed by governments and rules about foreign direct investment restricted the expansion of some retailers into those markets (Halpete, 2011; Reinartz, 2011).

There are a number of legal/regulatory issues identified by Lea-Greenwood (2012) that are current to fashion retailers in terms of how they communicate with their market including:

- The use of post-production digital enhancement of marketing images
- The sexualisation of children in fashion advertising and product assortment offering
- The use of size zero mode3ls in marketing activity and size ranges
- Misleading environmental claims and actions
- The use of violent imagery

A key legal issue in the fashion retail sector has been the issue of copyright of designs and counterfeit goods (Jackson and Shaw, 2008). The lack of regulation in China over these issues for many years resulted in a multi-billion dollar counterfeit industry that has been difficult for brand owners to manage. However, over the last few years China has introduced new legislation to help combat this problem and it has improved the situation somewhat, although this continues to be a global problem for fashion retailers.

4.2 Economic

The economic issues in the macro-environment will play a key part in influencing fashion retailing, and the obvious examples of this are detailed extensively in the previous section of this paper (section 1.2) which analyses fashion retail structures, with particular reference to developed, developing and emerging economies. With this in mind it could be argued that economic factors have significantly shaped the whole global fashion retailing structure, however economic issues affecting fashion retail may also include:

- Size of economy
- GDP per capita
- Disposable income
- Classification of economy i.e. developed, semi developed, early developing, less developed
- Population
- Income
- Consumption patterns
- Inflation
- Consumer Debt etc
- International groupings e.g. EU, NAFTA

The UK is still in a difficult economic situation, with GDP growth forecast to be 0.6% in 2012, which has been revised downwards from 1.6% (IMF 2012). The IMF is also forecasting that the UK may possibly be back in recession later in 2012 as the Eurozone problems impact upon the UK. Economic factors are affecting fashion retailing significantly and are directly linked to the political situation in the UK with austerity measures leading to a number of critical problems.

High unemployment levels are of great significance as this leads to consumers having less money to spend, and clothing does not take priority when people have restricted income. Unemployment is at its highest level since August 1994, and is forecast to worsen in 2012. In particular unemployment amongst 16 to 24 year olds will affect high fashion and value retailers as these consumers will have lower levels of spending power which will also be affected by increased university fees. This group of consumers has been little affected so far by the recession as many still live at home with parents but it is evident that this will change. This will prevent further volume growth in the market (Verdict 2012). It is unlikely that the private sector will be willing to create jobs to help reduce unemployment as the risks are too high and the economic future is uncertain. Economic factors have a strong influence on the marketing mix as retailers are forced to optimise the 4 Ps to ensure that they remain competitive through difficult trading periods. In the situation where consumers have less money to spend it is still vital that retailers attract customers to their stores rather than a competitor's.

In the fashion retail sector economic issues in any given market will determine the size and scope of the fashion market. For example, as discussed in section 1.2, economic factors determine the structure of the retail market e.g. in terms of traditional vs. organised retail formats. Crucially, economic factors determine the purchasing power of consumers in that market and in turn this is likely to influence the type of fashion product consumers will be motivated to buy, for example commodity products vs. luxury fashion. For fashion retailers this is an important consideration and average purchasing power per person is often a better benchmark of market potential not GDP of the market. For example, China has the world's biggest GDP but the huge gap in prosperity in this country means their purchasing power per person metric is relatively low.

4.3 Socio-cultural

Fashion retailers need to have a clear understanding of the impact of social and cultural changes on their consumers, as it is an element that is critical to success. Retailers may be required to adapt their ranges to a variety of consumers (Newman and Foxall 2003; Kent and Omar, 2003) and their changing needs, and it vital to search for niches and meet the requirements of those identified consumer groups (Sheridan *et al.,* 2006). However this is an area that is complex and difficult to manage and it is crucial that consumer understanding is a constant activity as the consumer is changing every day (Solomon *et al.*, 2010). The following factors currently influence consumer behaviour in fashion retail.

4.3.1 Growing Consumer Confidence

A lack of consumer confidence has had an impact on fashion retail in the last 6 years and certainly led to a decline in fashion shoppers, particularly in the 25-54 age group (Verdict 2012). A cut in the disposable income of many households due to limited wage growth, unemployment and the rise in everyday items such as food and petrol meant that consumers looked to reduce their spending on fashion (Verdict, 2012).

However Mintel (2014) reports that as the UK economy continues its recovery and consumers regain confidence they still expect good value for money in their clothing purchases and this often means waiting for sales and promotions before purchasing. Indeed consumers have become and are likely to remain bargain hunters.

4.3.2 Fashion Awareness and Celebrity Role Models

In recent years consumers have become far more aware of fashion trends (Barnes and Lea-Greenwood, 2010) forcing retailers to rise to meet customer needs more rapidly and cost effectively in order to capitalise on the opportunity to sell higher volume of garments to customers on a more frequent basis (Bruce and Daly, 2011). It would appear that some of this can be attributed to increased celebrity obsession as the plethora of media stories about celebrities has grown unabated (Doyle *et al.*, 2006). The subsequent impact of this has led to the demand for increasingly faster supply chains (Christopher *et al.,* 2004) and has ultimately put more power into the hands of consumers. This change to supply chain and lead times has become the ultimate aim for many retailers (Bruce and Daly 2011); indeed some such as Zara are renowned for using this approach and therefore are able to differentiate themselves from other high street retailers through their speed to market of fashion items. Previously slow cumbersome supply chains with difficult relationships between retailers and manufacturers lead to retailers having small ranges of product and a supply chain which was driven by the manufacturer (Easey 2009). A great deal of effort to improve supply chain relationships, with some retailers owning their own supply chain has led to a better performance and enabled retailers to use this as competitive advantage. Many fashion retailers have invested in enhanced supply chain technology (see section 4.4), and although this shift in ability to change supply time has required enormous investment it has justified the expenditure (Sheridan *et al.,* 2006). Growing fashion awareness and demands for cheaper clothes that are accessible to all created opportunities for the value fashion sector to develop rapidly. Additionally, value retailers have impacted consumer behaviour and encouraged consumers to buy more fashion. However the idea that this type of retailer is purely selling 'cheap clothes' is disputed by Ross and Harradine (2010) who state that the main purpose of this category is about 'cheap fashion' and therefore fashion that is appealing to the mass market because of its style and price. It could be questioned that in the current economic situation, consumers are shopping with value retailers because they need the clothes rather than want cheap fashion.

4.3.3 Changes in Shopping Habits

Consumers are changing the way they shop and their behaviour is influenced by a number of factors. In recent times UK consumers have been labelled as being 'Cash rich, time poor", (The Independent 6.4.04) and this was one of the key drivers of convenience shopping. This has changed however since the economic downturn in 2008 with consumers now deemed to be "Cash poor, time poor" (Mintel 2010). One of the impacts on fashion retail has been the shift towards supermarket fashion whereby clothes can be purchased alongside food, for example Florence and Fred at Tesco which has a turnover over £1bn on clothing (Mintel 2010). Part of this success is due to the fact that supermarket shopping offers consumers fashion both conveniently and cheaply, thus consumers have time to be fashionable. Convenience is also a factor in the growth of out of town shopping which has occurred in the last 10 years and has contributed in part to the demise of the traditional high street (Alzubaidi and Vignali 1997). However research demonstrates that the movement of consumers away from the High Street towards out of town shopping (Powe & Hart 2009) is justified as out of town retail offers a better atmosphere, more convenience and free parking (Borgers and Vosters 2011) thus illustrating that out of town shopping is an ideal place to execute retailing as a leisure activity. Comparison shopping has remained a constant reason for consumers to visit specific retail sites that offer the choice of stores, however online fashion retailing has opened a new avenue for comparison shopping which has been made easier than ever for the consumer (Drapers, 2012) this is discussed further in section 6.4 and 7.

4.3.4 Acceptance of New Technology

Consumers have readily and rapidly accepted new forms of technology and many are now accustomed to using websites and mobile commerce as part of their shopping repertoires therefore putting pressure on retailers to provide this additional channel and service to consumers (Chocarro *et al.*, 2013). According to Mintel (2014) 41% of all internet users had used a smartphone and 35% a tablet to purchase goods online in the last year. This has led to demands for websites that are enabled for smartphone and iPads, and additionally the creation of retailer applications. Many consumers now want to shop how and when they choose and retailers cannot always react as quickly as consumers would like. Indeed Drapers (2012) research shows that many fashion retailers are concerned about the rapid developments in technology and unsure how to react strategically to meet customer demands.

4.3.5 Increasing Demand for Clothing Quality

Mintel (2014) states that 31% of women are willing to spend more on well-made clothes that will last longer. Interestingly almost half of young women aged 16-24 are happy to spend more in return for quality. This attribute however is associated with the most affluent consumers, with highest household and annual incomes. This perhaps implies that trusted retail brands who can demonstrate value are attracting consumers who are interested more in longevity than fast fashion. However two fifths of the 16-24 age group see cheap prices as priority when they are shopping and are less driven by quality (Mintel, 2013), this trend will likely remain until the UK is out of the recession.

4.3.6 Brand Loyalty

Mintel (2011) states that almost 30% of consumers shop at five outlets or more for their clothes, indicating a lack of loyalty. This is most prevalent in younger consumers. However age is not an issue when the data for shoppers who frequent one to three stores is examined. Across all age groups this level of loyalty is strong and can be improved by fashion retailers who offer the right products, good stock availability and excellent customer service.

4.3.7 Ageing population

In 2014 Mintel reports that the fashion market for women aged 55+ is buoyant showing strong purchasing levels of 94% buying clothes in the last 12 months. One of the key challenges for retailers is the changing age profile of consumers and the increase in the numbers of those aged 65 plus. By 2030 this group will reach 15.5m in the UK (KPMG, 2014). Catering for this consumer in fashion retail will be challenging as there will still be a demand for fashionable clothing; it is possible that those fashion retailers catering purely for the 15-24 year old market will begin to lose sales as demographic trends shift in favour of more mature consumers. Catering for

Generation X, who tend to be well educated, IT literate and confident, may well be a challenge for fashion retailers (Mitchell, 2001).

4.4 Technological

A dynamic, challenging global industry, the high street fashion industry is one of few sectors under simultaneous pressure for short lead times and low costs. Shorter PLCs and rapidly changing consumer demand require a focus on agility to reduce lead times and satisfy consumer demand at its peak. In addition, the ever-increasing globalisation of production and retailing results in a complex environment characterised by highlight the increasing complexity of the global apparel environment which including *'globalisation of markets, increasing distance between industrial partners, proliferation of information, reduced time to market and emergence of code signing practices involving suppliers'* (Segonds et al, 2014, p.105). Advances in supply chain management technology in supply chain management provide retailers with improved capability to manage these environmental challenges.

To achieve competitive advantage by agility and responsiveness, supply chain initiatives based on collaboration, such as integrated systems and supplier development may be employed (Griffiths *et al.*, 2001). In the UK fashion industry, the move towards close collaborative working relationships was evidenced during the 1980s through the development of QR (Quick Response) techniques which enabled domestic manufacturers to compete with the off-shore sourcing of garments from lower labour cost countries (Christopher *et al.,* 1998; Emberson and Storey, 2006). QR performance relied upon a network of close alliances with supply chain partners, since such collaborative relationships are a precursor to responsiveness (Sheridan *et al.*, 2006). While QR was unable to prevent the large scale global shift of production to lower labour cost countries, it laid the foundations for companies to adopt a 'fast fashion' strategy, whereby retailers such as Zara, Primark and ASOS replicate catwalk trends at high speeds and provide budget versions for their customers using supply chain technologies to facilitate responsive collaborative working with a globally dispersed network of suppliers. In recent years, advances in technology have resulted in more sophisticated solutions for fashion retailers to shorten lead times in global sourcing networks and satisfy consumer demand at its peak. For example, PLM is a major evolution in the practice of innovative design and has led to the development and diffusion of numerous IT software solutions (Segonds *et al.*, 2014).

Product Lifecycle Management (PLM) refers to a company strategy as well as a specialised information system (Segonds *et al.*, 2014). In this paper we focus on PLM as database-driven software solutions that enable retailers and brands to manage their stock, reduce product development costs and shorten lead times from design concept to production. Technology enables scale efficiencies, innovation and consumer-centricity and thus plays a crucial role in helping retailers to create fresh and innovative products and deliver them to market in a timely and profitable manner (Gartner, 2013). As fashion consumers become increasingly demanding for instant trend gratification and production networks become more complex and geographically dispersed, the efficient management of product design and development is crucial for business success. PLM emerged in the 1990s, evolving from its predecessor PDM (Product Data Management) systems and coinciding with the large-scale shift to outsourcing. For large fashion retailers with huge networks of suppliers around the globe, PLM solutions provide *'a single version of the truth'* (Infor, 2014b, p.3). A common repository for data that can be shared with suppliers globally across the design, merchandising and sampling stages reduces the potential for time-lags as a result of errors that arise from multiple versions of documents. PLM systems offer better functionality, in terms of accuracy and consistency, than spreadsheets. The improvements in communication enabled by PLM shorten time to consumer and increase speed of replenishment (Infor, 2014b; Gartner, 2013). Furthermore, PLM systems support truly collaborative ways of working for geographically dispersed teams, so that tasks can be performed in parallel rather than sequentially, which helps to shorten the time to consumer. Parallel working also has benefits for improved product quality (Segonds *et al.*, 2014). PLM technology delivers clear benefits to fashion retailers, but also enables suppliers to access their retail buyers' data more easily, enabling suppliers to service their retail buyers more effectively. However, since there are a number of competing PLM systems available in the marketplace (Kaur and Sharma, 2011; Segonds *et al.*, 2014), suppliers that service a number of retailers may have to work across multiple PLM systems, which could increase complexity.

For example, Infor's Fashion PLM supports fashion designers, technical product developers, brand managers and merchandisers to collaboratively plan, create, develop and source fashion collections (Infor, 2014a). As well as supporting external collaboration with supply chain partners, it also supports internal collaboration between design, technical and commercial teams within the organisation. The software is highly configurable and can be accessed via the web or mobile app as well as desktop, allowing users to work anytime and anywhere. Furthermore, its attractive and user-friendly interface is specifically designed to appeal to creative as well as technical designers. For creatives, drag and drop features provide user-friendly functionality while mass create and edit capabilities reduce the amount of repetitive data-entry tasks and give users more time to focus on being creative and innovative. Greater user-friendliness in software design helps to spend up the process of adoption throughout the firm, increases employee motivation and reduces training requirements (Infor, 2014a).

PLM can also contribute to more sustainable ways of working. Harrop (2014) provides a number of examples including 3D virtual sampling as a way of reducing the amount of physical samples that need to be airfreighted from the supplier facilities to the retailer's headquarters. Although this technology is commonly used in the automotive sector, the fashion industry presents challenges due to the complex and soft textures of materials as well as the sheer volume of styles and colourways which are produced each season. German sportswear retailer Adidas has successfully used this form of technology to remove more than one million physical samples from its supply chain over a three year period (Eder, 2013), contributing to the sustainability agenda by reducing material waste and carbon emissions. 3D virtual sampling technology offers high definition, detailed photo realistic images, enabling the suppliers to fully appreciate the concise detailed requirements of the finished products. These complex simulation tools are built upon algorithms from the field of mechanical simulation, animation and rendering (Segonds *et al.,* 2014).The collaborative nature of the 3D virtual sampling software allows the supplier to query the requirements online, via collaborative white boards and screen sharing, to ensure that they have all the details to deliver the correct finished article, thus reducing the need for multiple sample iterations (Harrop, 2014). The retailer is then able to carry out mechanical simulations in order to verify that the design matches the specifications supplied (Segonds et al, 2014).

Since more retailers are operating multiple channels, the challenge of managing supply and demand has become more challenging as inventory problems can occur at any level of the supply chain, causing a knock on affect for supplier partners (Poloian, 2009). Supply chain efficiencies have been fuelled by technology, progressive management and the movement of a collaborative process which is designed to be customer centric in order to ensure the delivery of products to meet demand and return profit. Advanced technologies have improved supply chains with the main development being in radio frequency identification (RFID) which consists of tags and readers. The tag is a microchip that contains information such as where it was produced, manufacturer details or a unique ID number, this information is then transmitted to the reader, a wireless detector, which can translate the tag information in order to update the back-end database (Tajima, 2007). Vlachos (2014) conducted research on radio frequency identification (RFID) practices on supply chain performance finding that this technology significantly helps improve the performance of managing inventory, fulfilment planning, forecasting and replenishment concluding improvement of stock availability by 45.6%. Rushton, Croucher and Baker (2014) outline some of advantages to utilising RFID technology in logistics:

- Tracking raw materials and work-in progress through manufacturing;
- Tracking finished goods and unit loads in distribution centres: this can reduce labour time and costs through automated check-in, order shipment verification and stock checking;
- Tracking finished good and unit loads to shops or customers: this can enhance service provision through more accurate and timely information on order status;
- Tracking reusable assests such as pallets and roll cages: this can provide significant increased in asset utilisation by reducing asset cycle time and enabling better asset management.

It is evident from the advantages outlined by Rushton *et al.*, (2014) that tags provide more detailed information than barcodes which have been previously used to manage the supply chain; tags last longer and enable automatic identification through radio frequency, and they do not require line-of-sight contact in order to read information like barcodes, therefore increasing accuracy. The real-time data that RFID can provide is vast and RFID could be a solution for retailers who operate via multiple channels, to combine the insight about consumer behaviours and real-time information flow about fashion products (Ganesan, George, Jap, Palmatier, Weitz, 2009); which would allow a retailer to innovate and replenish stock responding to consumer demand.

Supply chain technology innovations also facilitate the management of ethics in fashion production. SEDEX is the world's largest collaborative platform for managing ethical supply chain data and enables suppliers to share the audit results with multiple retail customers. It reduces the costs of compliance for suppliers who may be subject to multiple audits each year for the various customers that they service. This helps to increase efficiency in the audit process so that retailers and suppliers can spend more time driving ethical improvements (Sadler, 2012).

Online shopping for fashion has grown significantly over recent years. However, further growth of online shopping is partly predicated upon the increased sophistication of e-fulfilment models for home delivery (Fernie and McKinnon, 2014). In the early years of rapid e-commerce growth, customers were often disappointed by poor delivery service, and as consumers become increasingly demanding, a key challenge remains on how to reliably and cost-effectively fulfil customers' orders. The typical e-commerce consumer of the late 1990s was an affluent and technologically proficient male, with low expectations of the online purchase experience. However, as the market expanded, the typical profile of the e-commerce consumer changed to become female mainstream shoppers from lower income brackets with higher expectations of the online purchase experience (Lavin, 2002, cited in Fernie and McKinnon, 2014). The last mile problem refers to the issue of delivery of items from the delivery vehicle to the consumer in the most efficient way. If the consumer is not at home when the delivery driver calls, then the item must be taken back to the distribution hub and another delivery must be organised, which increases the cost to the retailer. As noted by Fernie and McKinnon (2014) '*in making the final delivery to the home, companies must strike an acceptable and profitable balance between customer convenience, distribution cost and security'*. While consumers would prefer deliveries to be made urgently at a precise time with 100% reliability in order to minimise the inconvenience of having to wait at home for the delivery, few consumers would be willing to pay the cost associated with such a high service level. For the retailer, a 24-hour slot would provide the most cost-effective delivery solution, however few consumers would be willing to accept the inconvenience of having to wait at home for such a length of time.

The MD of one of the UK's leading premium express delivery companies explained in an interview in 2012 how the complexity in B2C deliveries results in higher costs compared to B2B: *'there are a whole load of add-ons that B2C customers really want – redelivery tends to be much higher, the challenge around returns is much greater, the Christmas peak is much higher and they tend to be a lot more choosy in terms of what I call in-flight redelivery requests – 'I'm not in tomorrow, can I change the delivery please'. All of those things tend to mean a more complex and costly delivery'* (Hobson, 2012). Notwithstanding these higher service expectations, the value that the consumer perceives to be in the delivery is low and consumers are generally unwilling to pay high delivery costs. Retailers have had to innovate with solutions to the last mile in e-commerce and the problem of non-attended delivery, when the consumer is not at home when the delivery arrives. New developments in improving delivery fulfilment include better communications (e.g. order tracking, text message updates etc), better choice of delivery slots (albeit costlier than a 24 hour slot) and rise of click and collect services.

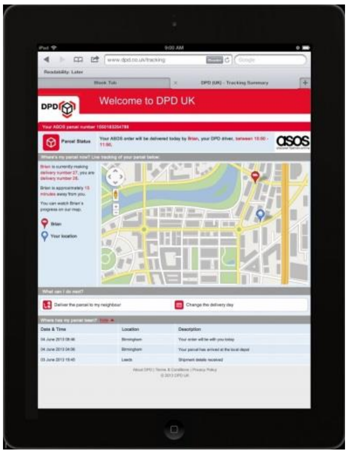
Many retailers use third party logistics providers (3PL) such as DHL, DPD, and City Link in the UK. The growth in e-commerce has led to new technology-enabled third party couriers entering the market, such as Shutl and Yodel. Many of these companies have innovated in communication technology to provide consumer with a more accurate delivery time frame to reduce the likelihood of non-attended delivery. For example, DPD recently launched two last mile innovations for the B2C market. Its predict service in 2010 was the first service to use GPS technology to notify parcel recipients by email or SMS of an accurate one-hour delivery window (Postal Technology International, 2013). A personal touch is added by notifying recipients of the first name of their driver, as seen in Figure 9 below.

Figure 9. DPD's Predict SMS notification

Source: Postal Technology International, 2013

In 2013, DPD launched its Follow My Parcel service in conjunction with fashion pure player ASOS, which allows recipients to live-track the progress of their parcel using a GPS mapping interface designed for smartphones, tablets and PCs, all the way down to the (Postal Technology International, 2013), as shown in Figure 10 below.

Figure 10. DPD's Follow My Parcel tablet interface



Source: Postal Technology International, 2013

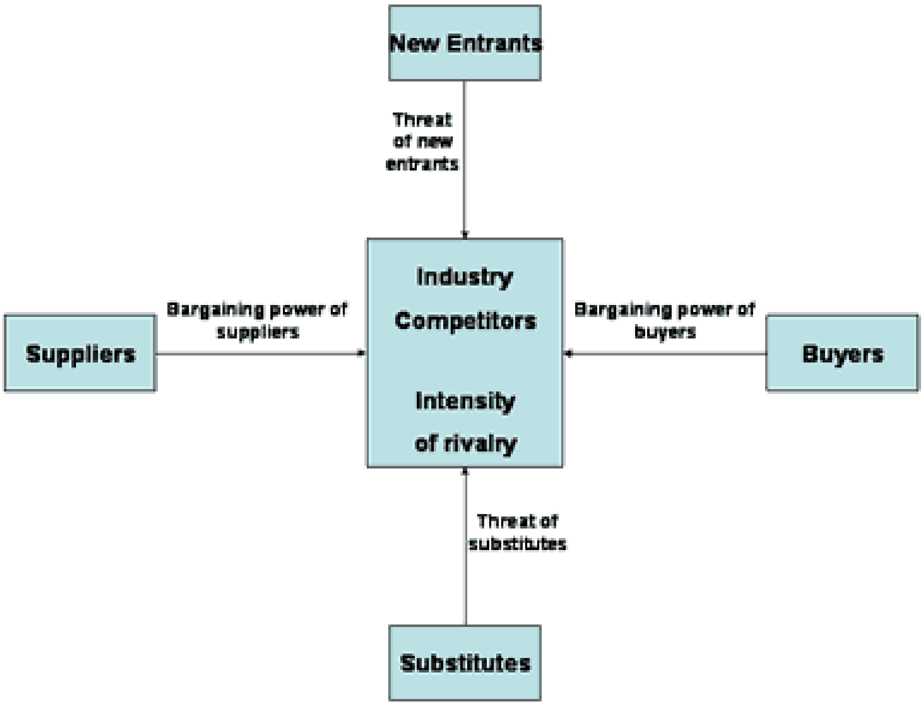
In the event that recipients cannot be at home to accept their parcel, flexibility of options maximises convenience. DPD offers a range of options for redelivery such as selecting an alternative delivery date, opting for delivery to a nominated neighbour, opting to have the parcel left in a specified safe place, collecting the parcel from a local DPD depot, or upgrading delivery to a new time slot such as before 10, before 12, in the afternoon or on a Saturday.

Changes in the technological environment have been rapid and relate closely to changes in consumer behaviour in terms of how consumers prefer to shop and communicate. Consumers have quickly adopted new technology from the internet to mobile communications and as this has become part of everyday life, consumers now require retailers to communicate with them using this technology. The evolution of new websites, social media and applications for smartphones has facilitated improved connectivity between retailer and consumer (Drapers 2012) this area will be discussed in detail in section 8.

5. Porter's Five Forces in the era of mobile communication

The high street fashion market is a challenging, dynamic industry sector, characterised by short PLCs, high product variety, high volatility, low predictability, relatively low margins and high levels of impulse purchasing (Bruce *et al.*, 2004; Masson *et al.,* 2007; Fernie and Sparks, 1998). According to Porter (1985), the attractiveness of an industry sector and thus the average long-term profitability of firms operating therein, depends on five forces. Applying this model to fashion retail facilitates analysis of the competitive environment in an industry where competition is high and profitability is becoming harder to achieve. The model, shown in Figure 11 below, illustrates the five industry-related factors that define a firm's competitive position and determine the profitability and attractiveness of industry sectors. The combination of the five forces determines how economic value is shared between major actors in the industry, namely competitors, customers, suppliers and producers of substitutes. Each force can have a positive or negative impact on profitability. However, even in unattractive industries it is possible for firms to earn above-average profits by deploying strategies that differentiate them from their competitors.

Figure 11. Porter's Five Forces (Porter, 1985)



5.1 The Threat of Entry of New Competitors

The fashion industry, according to Knutsen (2004, p.550), is *'a technologically mature industry with low barriers to entry, and a relatively flat and price-sensitive market'*. This suggests it is difficult for retailers to achieve profit as the threat of new entrants is high. Certainly the arrival of new and successful international fast fashion retailers over the years, such as Zara, H&M, Gap and more recently Forever 21, has increased the level of competition for incumbent UK retailers. The internet and growth of e-commerce has further opened up the market and increased competition. Porter (2001) stated that e-commerce can weaken industry profitability by reducing barriers to entry for new entrants and by reducing switching costs for consumers. E-commerce represents a low-risk means of entry for overseas retailers and allows them to keep costs low until a secure trading base is established. E-commerce also levels the playing field between small independents and large retailers, enabling consumers to access a wider variety of fashion retailers than previously. Established fashion retailers face competition from smaller players who now have better access to the marketplace and higher visibility than possible with only a bricks-and-mortar store. For example, designer childrenswear retailer Childsplay Clothing trades from only two stores in the UK but ships worldwide and has a global customer base that values its selection of “the world’s finest designer brands for children newborn to 16 years”.

Competition has also increased with the emergence of fashion pure players, or firms that only exist online, such as ASOS and Net-a-porter. These businesses have grown successfully and disproved the notion that high-involvement goods such as clothing are not suited to online retailing. For cash-rich and time-poor consumers, online retail offers a convenient means of browsing and shopping for fashion while on the move or outside of traditional store opening hours. Furthermore, advances in web technologies allow consumers to play around with outfit building and provide editorial content to promote the latest trends to encourage shoppers to buy the complete look, without having to wander the high street or pore through fashion magazines for inspiration (Mintel, 2014.). Consumers increasingly happy to purchase high involvement fashion products online, which is partly supported by the development in technologies to make websites more interactive and provide customers with the ability to evaluate items online, as well as a more engaging online shopping experience. Thus, European online clothing and footwear sales totalled around €33.2 billion in 2012, equating to approximately 20% of all online retail sales in Europe (Mintel, 2013). The three leading pure players in the European online fashion market are ASOS, Zalando and Amazon Europe, although their market share remains relatively low, suggesting opportunities for substantial market-share growth (Mintel, 2013). In 2013, ASOS’ share of the European online fashion market was 1.6% (up from 1.4% in 2012), Zalando’s was 6.1% (up from 4.0% in 2012) while Amazon Europe commanded a market share of 6.4% (up from 5.5% in 2012). Pure players represent a growing threat to store-based retailers not only from their online operations, but also from the emerging trend of online retailers such as Simply Be in the UK and Bonobos in the US. Others such as Net-a-porter and eBay are entering the physical space by way of pop-up shops or virtual shopping walls. Furthermore, as the majority of multiple retailers in developed markets now also sell their products online through their own websites or via virtual shopping malls, an additional challenge of cannibalisation emerges between online and physical distribution channels (Euromonitor, 2013). Now that consumers can shop from multiple retailers online, it is inevitable that online retail will displace some physical store sales, and therefore a large store portfolio in mature markets is becoming less necessary. Many retailers are rationalising their store portfolio, as e-commerce effectively becomes the largest store in the portfolio and capable of serving the whole country. Prior to e-commerce, maturity for a UK fashion retailer was in the region of 250-300 stores nationwide, but with the advent of online retail, a mature portfolio would require only 100-150 stores plus a transactional website (Williams, 2011). Physical retailers respond to the threat of e-commerce players by creating more engaging and experiential stores where shoppers can be amazed and amused.

The e-commerce channel also enables consumers to move further down the long tail than previously possible and cultivate tastes for niche products and services. Anderson (2006) defined the long tail as *'the consequences of the abundance boom created by technology'* and argued that success could be achieved by selling less popular items, rather than bestsellers. Whereas success in physical retailing rests upon selling more popular items, success in online retailing could lie is selling less popular products for which greater demand levels can be aggregated over a larger geographical area. Most importantly, the tail is potentially infinite, see figure 12.

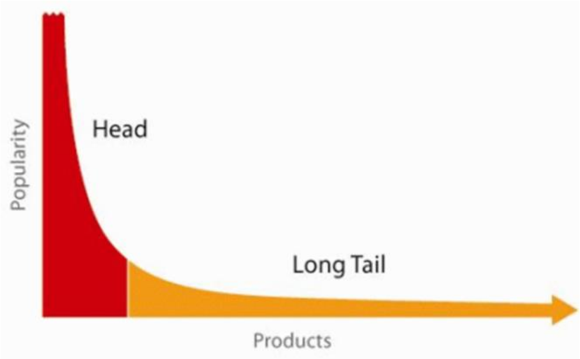


Figure 12: The Long Tail

While it may not be profitable for a physical retailer to stock niche items, due to the stocking cost and insufficient local demand, online retailers can aggregate demand on a national or even global scale and the cost of stocking such products is far lower than for a physical retailer. For example, Brynjolfsson *et al.,* (2007) calculated that around 30-40% of Amazon book sales are niche titles that wouldn't normally be found in a bricks-and-mortar store. Before the advent of online shopping, consumers were limited to mainstream products which would sell in large volumes. However, the development of e-commerce allows retailers to potentially range an infinite amount of products, so consumers are able to move further down the long tail and are no longer limited to selecting from the most popular products only.

The evolution of web technology has not only led to increased competition from small independents and overseas fashion retailers, but also the emergence of new retail business models, such as aggregators, flash sales, subscription websites and rentals. This leads to increasing numbers of retailers competing for the same consumers.

Online aggregators act as virtual shopping malls or portals for consumers to discover fashion and accessories from far and wide, without the spatial and temporal limitations characteristic of physical retailing. They also provide a shop window to the world for small fashion brands and retailers. Aggregators do not hold stock but pull content from a variety of other sellers' websites, and as such they are highly capital efficient and attractive to investors. For example, Farfetch.com provides a window to some of the world's best independent fashion boutiques, which the consumer can shop without leaving their home, and pay for in a single checkout procedure. Orders are shipped direct from the boutique itself. While some aggregators specialise in particular product categories, as seen in Table 6 below, Lyst.com partners with retailers, designers and fashion bloggers so that consumers can create a personalised fashion marketplace with a customised feed of products.

Table 6: Examples of online fashion aggregators

Aggregator	Product category	Website Description
Farfetch.com	Fashion and accessories	"An online marketplace for independent fashion boutiques globally"
Boticca.com	Jewellery and accessories	"The world's luxury bazaar of fashion accessories"
Littleblackdress.co.uk	Dresses and accessories	"The world's largest collection of little black dresses, party dresses and accessories to complete your going out look"
Notjustalabel.com	Fashion and accessories	"The world's leading designer platform for showcasing and nurturing today's pioneers in contemporary fashion"
Shoptiques.com	Fashion and accessories	"A one-of-kind online destination for discovering and exploring local boutiques across the world"
Lyst.com	Fashion and accessories	"The world's biggest fashion selection bringing stores, designers and fashion influencers together to create a store made just for you"

Flash sales are membership-only websites which offer heavily discounted past-season products to consumers for a short period only. The high level of discount and the short time window in which items are available encourages a sense of urgency in consumers. The members-only aspect creates a sense of exclusivity, and while many sites allow customers to sign up on their own, some initially required an invite from an existing member. Products on flash sales sites are shielded from search engines, so they do not pop up in response to online searches for the brand names. Brands and designers therefore benefit by being able to get rid of old stock quickly and discreetly, without the potential disgrace of having heavily discounted products lingering on the shelves of discount retailers in full public view, which could devalue brand equity in the consumers' eyes. Examples of flash sales websites include vente-privee.com, brandalley.co.uk, secretsales.com, gilt.com, hautelook.com and ruelala.com. The success of this business model has led some firms to expand into other product categories such as wine, homewares, travel and property, such as Gilt with its subsidiary Jetsetter.com which offers heavily discounted luxury holidays and accommodation. Similarly to online aggregators, flash sales sites do not necessarily hold stock. Many sites, like Gilt, one of the most popular and successful private sale sites, operate on the 'Block, Sell and Ship' model. In this model, brands send samples of their clothes to Gilt, where merchandise buyers hand-pick items for the site. The buyers then place their orders for the amount of merchandise they'd like the brands to set aside for the sale, based on available stock. After members have paid for their goods and the sale ends, Gilt then places the confirmed purchase order with the brand for what it has sold online. Merchandise is then shipped to Gilt, where everything is packaged in Gilt-branded boxes and shipped out to customers. This is a low risk model. The most Gilt really has to worry about is the time it takes for the brand to send its purchase order, and then send it out to customers. Another risk in this model has to do with inventory. If the count isn't accurate, you could have a number of customers receiving refunds and apologies that their order could not be filled. The risk then is that the customer becomes discouraged and will look to other sites.

Another common way that other sites operate is to purchase and fulfil orders directly. With this model, the sites take more of a risk but have the potential to offer customers the best discounts. In this business model, the firm contacts brands to assess the amount of inventory available, and the brands will send inventory reports and samples. In contrast to the 'block, sell, ship' model, the more inventory the site buys, the better the wholesale price, and the better price it can offer to its members. The risk here is that if a site overestimates demand and orders too much of a brand's inventory which then goes unsold, profitability is reduced. However, some sites have a permanent outlet section, where orders are fulfilled immediately and which could be used to shift purchased stock which is left unsold at the end of a sale. Many fashion retail brands have low levels of brand loyalty, making it likely that new entrants could take custom away from established brands. However, Hergerth (2007) disagrees saying that whilst new businesses can quickly establish the name of their brand, consistent and sustained brand support and development are required for brands to truly thrive.

5.2 The Bargaining Power of Buyers

The power of buyers is high in industries where buyers can easily switch from one brand to another, as is the case in fashion retail. This has been demonstrated by success of value retailers such as Primark who entered the market recently but has already displaced incumbents in terms of market share. Its low-priced fast fashion offering forced other retailers to reduce their prices, thus reducing the likelihood of other fashion retailers making profit as price competition leads to lower margins and profits, jeopardising long-term business sustainability. In addition to value retailers, overseas fashion retailers such as H&M, Gap and Zara have such wide reaching and large scale businesses that they too can force prices down and deliver compelling offers to attract consumers. Recent consumer research reveals that 71% of UK consumers' fashion purchasing decisions are driven by price (Retail Week, 2014).

This is clearly seen in Table 7 below, which shows changing market share of leading UK fashion retailers between 2006 and 2012 and during which time value retailer Primark more than doubled its market share and became the UK's fourth largest fashion retailer.

Table 7. Market share of top 10 UK fashion retailers 2006 and 2012 (Mintel, 2006, Mintel, 2013)

Rank	Retailer	2006 market share %	Retailer	2012 market share %
1	Marks & Spencer	10.8	Marks & Spencer	7.6
2	Next Group	7.6	Next Group	7.2
3	Arcadia Group	5.3	Arcadia Group	5.6
4	Asda	4.0	Primark	4.8
5	Debenhams	3.5	Sports Direct	3.5
6	Tesco	2.9	Asda	3.4
7	Matalan	2.9	TK Maxx	3.0
8	John Lewis	2.3	Debenhams	2.6
9	TK Maxx	2.3	JD Sports	2.6
10	Primark	2.2	Matalan	2.3

Consumers encounter lower search costs through web search, browsing and recommendations, as technology makes it easier for buyers to find lower-cost sellers. This transparency increases the level of price competition in the market. Customisation of viewing can be based on a set of preferences specified directly by the consumer, or more subtly, the features of the customised product might be deduced automatically through cookies on a website. Technology thus allows the identification and tracking of individual consumers, both within a specific online store and across different websites. Profiling technologies allow the creation and sharing of consumer profiles, and the matching of consumer identities with relevant demographic information. Such techniques can be used to discover or estimate the preferences of specific consumers. Product offerings can be customised and recommendations can be made based on a consumer's attitudes, past behaviour and demographic characteristics, or through 'collaborative filtering' systems that offer recommendations based on the feedback and experiences of consumers with a profile of likes and dislikes similar to the targeted consumer.

Markets with increased product variety, and increased information about these niche products, allow consumers to discover and purchase products that otherwise would be unavailable. This can lead consumers further down the Long Tail, allowing them to cultivate deeper tastes for these niche products.

5.3 The Bargaining Power of Suppliers

Suppliers have power when they are few in number and it would be difficult for a buyer to switch to another supplier. In the fashion industry, supplier power is low. Fashion supply chains are characterised by a strong power imbalance in favour of the retailers (Hines and McGowan, 2005). This is due to the exceptionally high degree of buyer concentration, a very low degree of supplier concentration and the industry's historical tendency towards adversarial trading relationships, which means that garment manufacturers possess a very low degree of market power compared to retailers (Jones, 2006). UK fashion retail in particular is highly concentrated within a small group of large retailers, with 28% of consumer expenditure on apparel accounted for by fashion multiples (TNS, 2008, cited in Jackson and Shaw, 2008). In 2007, the top five retailers accounted for 35% of UK clothing sales (Morris and Barnes, 2008). While there is more emphasis on independent fashion retailers selling branded merchandise in European countries, the UK high street fashion sector is dominated by multiples selling own-label product.

High street brands and retail groups such as Arcadia, Aurora, Next and Marks and Spencer do not own production facilities. Instead, they take advantage of the cost efficiency and flexibility offered by operating as supply chain networks and subcontracting garment manufacture to lower labour cost countries. The size and buying power of these large retail groups gives them a distinct advantage over garment manufacturers. These powerful retail buyers organise highly competitive and globally dispersed production networks (Gereffi *et al.*, 2005). Their success is dependent on *'their ability to shape mass consumption via strong brand names and their reliance on global sourcing strategies'* (Gereffi, 1999, p.43). The bargaining power of garment suppliers in general is limited due to the global abundance of garment manufacturing capacity; however, large-scale suppliers that produce for volume retail buyers such as Gap and Nike may acquire a greater proportion of supply chain power, since alternative suppliers that are able to produce such volumes are scarcer (Hergeth, 2007).

5.4 The Intensity of Competitive Rivalry

Rivalry in the fashion industry is increasingly intense as there are high numbers of businesses of similar size competing for the same customers. The degree of rivalry is the strongest of the Five Forces, and that this high level of competition can lead to market exits, particularly when economic circumstance are difficult and competition intensifies further (Kotler, 2003). The demise of Peacocks, La Senza and other fashion and footwear retailers in the UK marketplace demonstrates the power of this force. Added to this, existing companies are each seeking shares of a market that is not growing significantly and there are signs that consumers are becoming less brand loyal as they seek value from products and are easily able to get similar products from a range of companies, due to the homogeneity of the fashion market (Mintel, 2011). This level of rivalry can lead to significant benefits for fashion consumers, as price reductions become commonplace. Technological innovations increase price transparency for consumers. For example, UK start-up Grabble is a social fashion discovery and commerce platform that enables users to create personalised fashion wishlists from multiple retailers. Users also receive alerts when any of the items in their wishlist are reduced in price.

Subscription sites cover fashion, beauty and accessory categories, across menswear as well as womenswear, and offer consumers the opportunity to keep up to the minute with new trends recommended for their particular tastes by a team of stylists. Leveraging the elements of a curated selection, personalisation and the celebrity influence from stylists, consumers can benefit from saving time and money whilst maintaining a fashionable look. Most subscription services require users to fill out a short style and preference questionnaire and then use algorithms to provide recommendations for the user. Users can choose to purchase or skip an item each month. Examples include UK-based Stylistpick and US-based BeachMint (covering sub-brands JewelMint, ShoeMint StyleMint, IntiMint). Rentals or dress hire are well-established business models, but the internet has increased access to them for consumers. Examples include WishWantWear, GirlMeetsDress and RentTheRunway. Another technology-enabled fashion business model that represents a source of competition to incumbent fashion retailers is peer-to-peer commerce, which takes the form of sales or rental websites and mobile apps such as eBay, ASOS Marketplace, Schpock and Depop."

5.5 The Threat of Substitute Products or Services

The fashion market has grown more homogenous as value and fast fashion retailers have driven changes in the market leading to a proliferation of designer copies available at low prices. There is little brand loyalty and consumers are easily able to switch between retailers; indeed consumers can buy similar designs from Zara or Primark depending on their budget and preference (McColl and Moore 2011). Consumer wardrobes in the UK are saturated, as evidenced by recent findings from consumer research. According to Retail Week (2014), 70% of UK women agree that their wardrobes and drawers are full to bursting, while 50% agree they have several items that have never been worn. This suggests that consumers may be less willing to purchase more clothing than previously, and perhaps more willing to spend disposable income in other sectors, such as consumer electronics or leisure activities. Technological advances in consumer electronics lead to intensifying competition for share of wallets, as consumers treat themselves to the latest tablet, smartphone or e-reader instead of a fashion garment. Increasing availability and social acceptance of beauty treatments and personal adornment such as manicures and spray-tans, piercings and tattoos provide another source of competition for fashion retailers' share of consumer wallets. The trend towards healthier living means that fashion is competing with gym or fitness club memberships. Furthermore, socio-cultural shifts away from purely materialistic pleasures towards experiential fulfilment means that fashion is now competing with eating out, leisure activities, holidays and travel.

6. Emergence of Omni-channel retailing

As previous sections in the paper have outlined it is factors such as technological development, changes in the economy, amplified market competition and increasing globalisation that has spurred the growth of omnichannel retailing into mainstream awareness. The retailing sector is forced to pursue innovation from the most recent technical solutions as consumers have adopted new technologies and become omnichannel consumers. There is now an expectation by consumers that information be freely available to all and at all times (Verhoef, Neslin, and Vroomen, 2007a), this puts an immense pressure on retailers to develop the traditional store into a model that is accessible 24/7. However this can be equally as beneficial as Shanka, Inman, Mantrala, Kelly and Rizely (2011; p30) denote *'the rise of powerful search engines, advanced mobile devices and interfaces, peer-to-peer communication vehicles, and online social networks have enhanced [...] ability to reach shoppers through new touch points'*. There is increased pressure for all retailers to satisfy the new retail savvy customer that uses multiple devices and channels to shop, which has led many retailers to rethink their retail strategy and adopt an omnichannel approach. The term omnichannel is still relatively unheard of within academic research, whereby a retailer views each of their channels as a singular seamless operation (Drapers, 2012). However the need for consistency across multiple channels is acknowledged as a key driver in multichannel retailing and marketing literature (Berman and Kesterson-Townes, 2012; Lazarevic, 2012), however there are not many retailers that have yet achieved this (Shankar, Inman, Mantrala, Kelley, and Rizley, 2011). Drapers' Multichannel report (2012) highlights that even within the UK retail industry there is no specific industry body or benchmark retailer considered as a market leader of successful multichannel/ omnichannel concept. Therefore trial and error is the current method by which retailers are attempting to move towards an omnichannel operation (Drapers, 2012). It is this fundamental lack of existing research on the area omnichannel retail that dictates the need for further research in order to fully understand the omnichannel shopper and journey. Technology is used throughout the retailing process in order to improve the shopping experience for the consumer and improve efficiency and points of sale for retailers. To understand how technology is being used by fashion retailers, it is important to understand the history and development of online retail and how that has changed the fashion retail market.

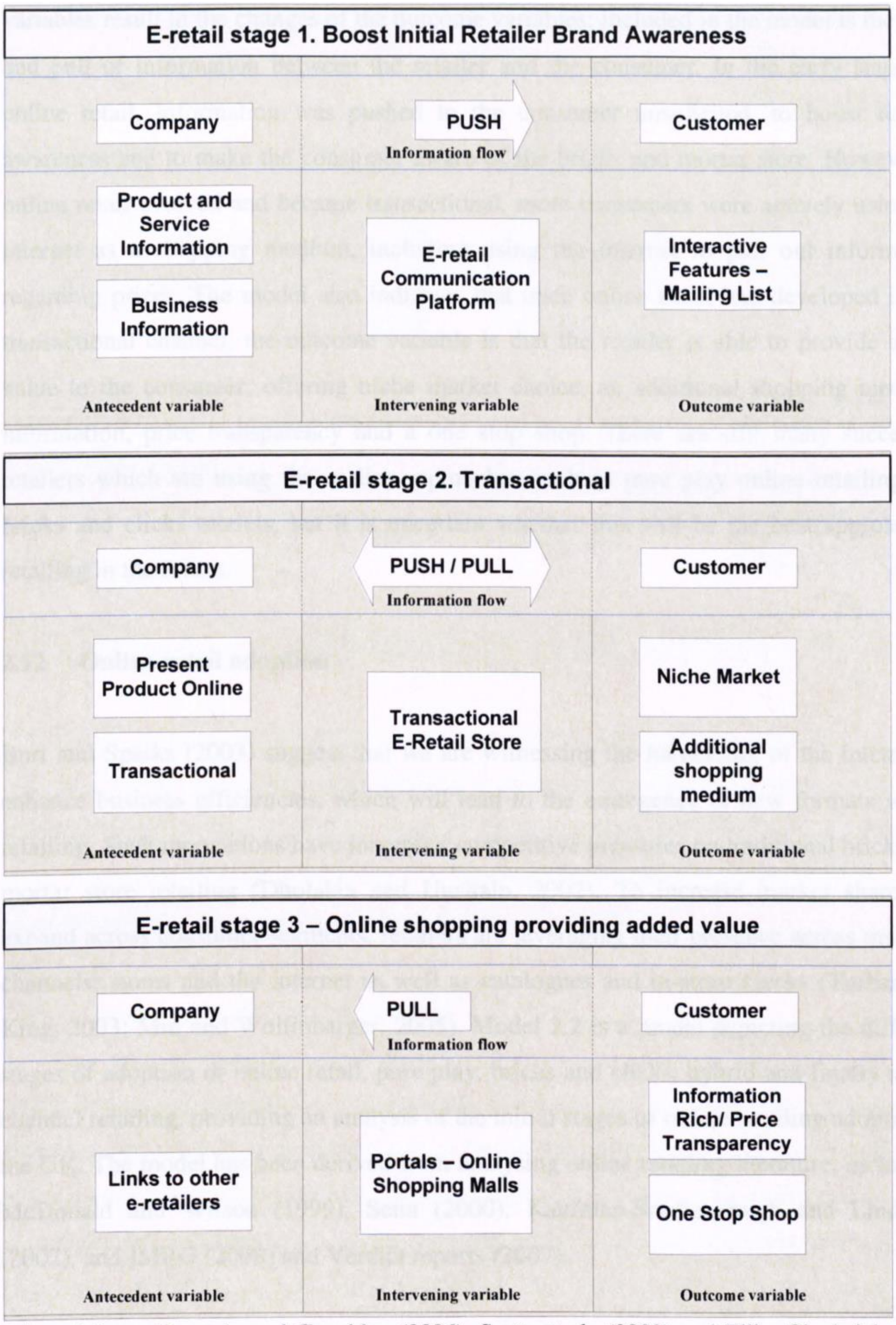
6.1 History and Growth of Online retailing

Initial users of the Internet were largely a technical audience of government agencies, academic researchers and scientists in the 1970s and 1980s. Ecommerce applications expanded rapidly due to the developments of technical innovations (Turban *et al.*, 2007). During the mid-nineties, the commercial use of the Internet triggered high expectations in both executives and investors (Senn, 2000). After initial excitement and many entrepreneurs investing in dot-com business, retail sales were lower than anticipated. Due to the collapse of many start-up companies, many academics theorised about the reasons for the downturn, many believing that basic business methods such as developing a business strategy, brand, intellectual capital and business processes were not followed leading to the crash. Another factor was that traditional bricks and mortar retailers were reluctant to embrace Internet technologies due to a fear of cannibalising their own sales (Marciniak and Bruce, 2004). It was over 10 years ago that Burt and Sparks (2003) suggested that businesses were beginning to harness the Internet to enhance business efficiency, which would lead to the emergence of new formats within retailing. If we fast-forward 11 years we now have consumers that are digitally-connected, who utilise multiple shopping channels to get the product they want, when they want and at the price they want to pay. From a business perspective it is now considered that for a B2C company, an online presence and marketing capability is no longer an option, and is viewed as an essential channel (Taylor and Strutton, 2010). A brief overview of the UK economy and online fashion market will follow, before analysing the current context of online retailing and the development to Multichannel and Omnichannel retailing.

6.2 Development of Online Retailing

It is important to understand the stages of development of online retailing since the internet became a transactional channel to see how retailers and consumers have utilised it. The first stage of online retailing has been defined by Ellis-Chadwick *et al.*, (2002) as the communication platform, presenting information regarding products and store location. Scott *et al.*, (2003) defined that it is at this stage that interactive features were offered, such as joining a mailing list or catalogue ordering, in order to prompt the consumer to make a purchase and raise brand awareness. The transactional E-retail store is the second stage where retailers developed an online shop where they could sell their products and services online, and the final stage is that of a portal, retailers moving beyond a sole e-store, instead developing or participating in portals, in order to create an online shopping mall (Henderschott *et al., 2001;* Scott *et al.*, 2003).

Figure 13. Stages of online development



Adapted from: Kennedy and Coughlan (2006), Scott *et al.*, (2003) and Ellis -Chadwick *et al.*, (2002)

The model (Figure, 13) hypothesises the development of online retail, translating how the antecedent variables result in changes of the outcome variables, included in the model is the push and pull of information between the retailer and the consumer.

Primark is still at stage one whereby they only use their website to communicate information about the products and business. However in June 2013 Primark trailed selling clothing through the pure play fashion retailer ASOS, it was a limited trial in order to give the company an insight into online retailing. ASOS is a fashion retailer that is as Scott *et al.*, (2003) identified as a portal, it is a global online fashion retailer selling over 65,000 branded and own-label products, shipping for free to 234 countries. ASOS's websites attract 29.5 million unique visitors a month and as at 31 December 2013 had 14.8 million registered users and 7.9 million active customers (ASOS.co.uk) which make it a one-stop-shop for customers and a positive platform to retail from a business perspective due to its global reach. Most fashion retailers are either at stage two, having their own transactional website, and many are also adopting stage 3, linking with other fashion retail websites, such as ASOS, Amazon, Ebay and more recently the development of dedicated fashion search engines such as shopstyle.co.uk and OSOYOU.com which provide style inspiration and present the latest fashions and then redirect customer to the retailers website in order to buy the product.

Much of the early literature regarding online retailing focused on acceptance and motivations to use the Internet. A users attitude to the adoption of online shopping can be attributed to the classic consumer behaviour models, namely the technology acceptance model (TAM). The technology acceptance model designed by Davies, Bagozzi and Warsaw (1989) considered factors contributing to that acceptance of internet technology and online service providers, in its purest form outlining that a user’s perceived usefulness and ease of use of any one given technology determines their attributes and hence their ability to adopt the technology as a way of life (Huang, 2008). The model has been continually re-developed and new factors have been added since more consumers have adopted the web and online retailers have evolved and factors such as trust, enjoyment, intrinsic and extrinsic motivation and human an social change process variables have been applied (King and He, 2006; Schepers and Wetzels, 2007).

Today E-commerce represents a huge market for retailers in Europe with retail sales predicted to reach £111.2 billion in 2014 (Centre for retail research, 2014). According to Verdict (2013) the UK online retail market will grow from £30.1bn in 2012 to £50.2bn in 2018, representing 14.6% of all retail expenditure by 2018 therefore deducing that online shopping is now a widely accepted medium in the UK. Table 8 ranks the most attractive countries for online retail in both developed and developing markets (A.T. Kearney 2013). China is ranked number one as it is forecast to rapidly grow in five years to $271 billion. China has the world’s largest population, 1.36 billion, and the most internet and online shoppers, and with increased internet access to rural regions, improvements in infrastructure and rising wealth, China has a lot of potential for online growth. Globally, the US is still the leader in online retailing compared to Europe, however Asia is set to overtake North America in terms of total online sales. Internet use and confidence is growing in more of the developing countries such as Brazil, Russia, Saudi Arabia and South Africa, with more economies adopting online due to improved online practices increasing consumer confidence, better internet accessibility, financial systems and logistical infrastructure (A.T. Kearney, 2013). There is still a lot of potential for other European countries such as France, Sweden and Italy to grow online market share. Online sales in clothing and footwear across Europe represent around 9.9% of all Europe’s clothing and footwear spending in 2013, and around 20% of total online retail sales in Europe according to Mintel (2013). According to Neilson (2012) internet users account for one-third of the world population and one billion persons are expected to make a purchase online in 2013. Apparel and accessories, books and travel reservations are the leading product categories for online purchases globally (Neilson, 2012).

Table 8. The 2013 Global Retail E-Commerce Index

Rank	Country	Market type	Online market size (40%)	Consumer behavior (20%)	Growth potential (20%)	Infra-structure (20%)	Online market attractiveness score
1	**China**	Next Generation	100.0	68.8	100.0	51.1	84.0
2	**Japan**	Digital DNA	100.0	100.0	17.4	99.1	83.3
3	**United States**	Established and Growing	100.0	77.6	39.8	96.5	82.8
4	**United Kingdom**	Established and Growing	100.0	77.5	14.7	86.3	75.7
5	**South Korea**	Digital DNA	79.6	97.4	9.3	95.1	72.2
6	**Germany**	Established and Growing	90.3	78.3	28.1	65.1	70.4
7	**France**	Established and Growing	85.5	75.7	7.4	71.6	65.2
8	**Brazil**	Next Generation	37.2	51.2	64.7	64.1	50.9
9	**Australia**	Established and Growing	15.7	89.4	46.2	86.9	50.8
10	**Canada**	Established and Growing	17.7	73.5	48.3	91.5	49.7
11	**Singapore**	Digital DNA	2.3	93.1	28.9	100.0	45.3
12	**Argentina**	Next Generation	9.2	59.1	75.7	68.0	44.2
13	**Russia**	Next Generation	34.9	51.8	56.4	42.3	44.1
14	**Hong Kong**	Digital DNA	3.2	93.7	17.2	100.0	43.4
15	**Italy**	Next Generation	16.1	52.2	64.3	60.7	41.9
16	**Sweden**	Established and Growing	12.1	77.5	21.7	85.7	41.8
17	**Slovakia**	Next Generation	2.0	71.5	86.4	44.3	41.2
18	**New Zealand**	Digital DNA	2.5	92.3	28.1	78.5	40.8
19	**Netherlands**	Established and Growing	16.2	77.5	17.4	73.9	40.2
20	**Chile**	Next Generation	3.9	61.0	56.5	74.8	40.0
21	**Finland**	Established and Growing	13.3	77.2	13.6	82.1	39.9
22	**Turkey**	Next Generation	10.7	26.6	72.9	78.4	39.9
23	**Venezuela**	Next Generation	2.5	49.5	100.0	42.1	39.3
24	**Belgium**	Established and Growing	9.8	70.6	26.5	73.1	38.0
25	**United Arab Emirates**	Next Generation	0.9	50.3	49.2	87.8	37.8
26	**Norway**	Established and Growing	12.3	77.5	9.7	75.7	37.5
27	**Ireland**	Next Generation	7.2	62.3	42.2	67.9	37.4
28	**Denmark**	Established and Growing	10.2	78.3	14.1	73.0	37.2
29	**Switzerland**	Established and Growing	13.2	68.2	10.9	79.4	37.0
30	**Malaysia**	Next Generation	1.0	63.0	44.2	75.0	36.8

Note: Scores are rounded. 100 is the highest score and 0 the lowest for each dimension. Market type is determined by comparing online growth potential and online consumer behavior.

Sources: Euromonitor, International Telecommunication Union, Planet Retail, World Bank, World Economic Forum; A.T. Kearney analysis

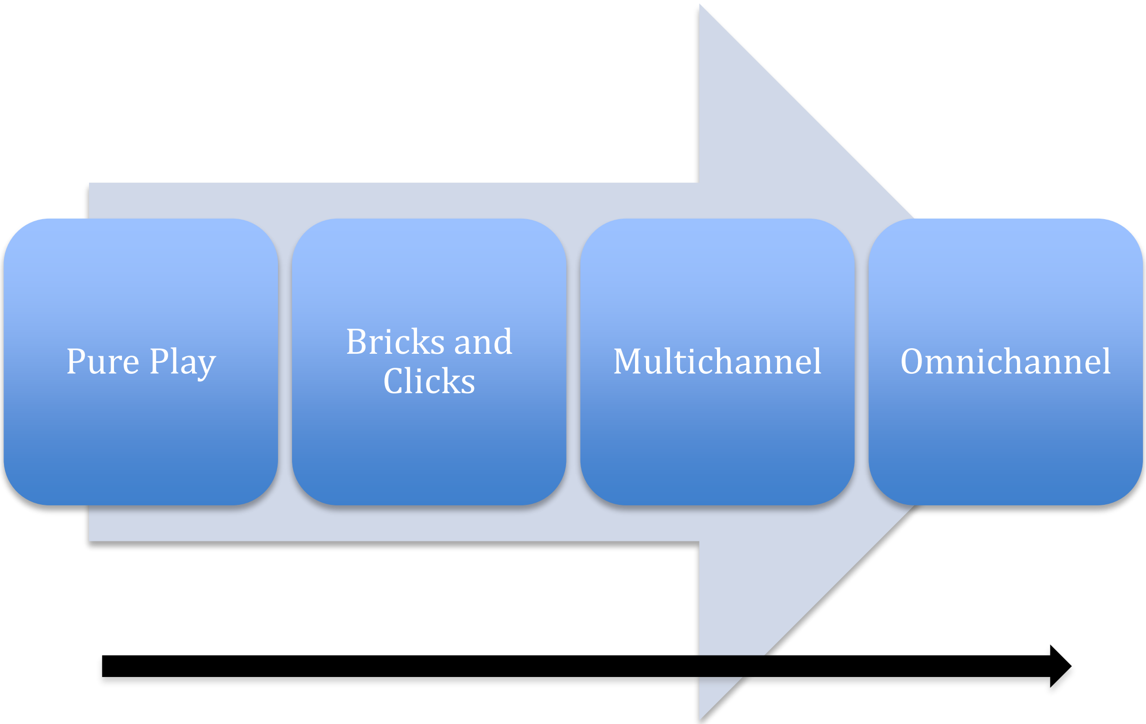
Soure: A.T. Kearney 2013

The worth of the online global B2C retail market is estimated at 825 billion Euros in 2012, with the UK online retail market totaling 78 billion pounds (IMRG, 2012). This is predicted to see an ongoing increase in sales, rising from 12.7% of the UK online retail market in 2012, up to 21.5% before the end of this decade (Centre for Retail Research, 2013b). The UK consumer are now found to spend more than £1000 per person shopping online per annum, the highest amount out of every nation compared in the latest Ofcom report (2012).

Within the expanding online market, existing retailers are found to be experiencing increased global competition (Wang, Minor, and Wei, 2011). From a business perspective it is now considered that for a B2C company an online presence and marketing capability is no longer an option, and is viewed as an essential tool (Taylor and Strutton, 2010). It is evident from the Ecommerce index in Table 8 (A.T. Kearney, 2013) that online shopping is still experiencing organic growth and internet usage has not yet reached saturation point in many countries, therefore there is a pronounced potential for fashion retailers that develop an online or operate multiple channels to grow their business.

6.3 Omni-channel development

Figure 14 traces the development of omnichannel retailing in the UK. Ecommerce which is at the heart of omnichannel retailing has progressed over the past decade from pure play online retailing to bricks and clicks partnerships, then retailers integrated channels to become multi-channel, and the most recent, omnichannel strategy; it is important to analyse the different methods to market.



6.3.1 Pureplay

A pure-play retailer can be defined as *'a retail organisation which uses electronic data transmission as a sole means to sell directly to a consumer'* (Schneider and Perry, 2000). There are several pure play online retailers that have established themselves as global successes and serve as an important part of the infrastructure for supporting the wide uses of the internet. Companies such as Ebay and Amazon were among a few of the companies that received much media coverage at the beginning of commercial use of ecommerce (Razi, Tarn and Siddiqui, 2004), but their success no-one could have predicted. Both companies are vastly successful with many brands selling via the Amazon and ebay platform. According to Mintel (2012) pure play retailers have 15% of the online fashion market share with online fashion retailers Net a porter, My wardrobe and ASOS leading the way in the UK.

In the early days of e-commerce, early 2000, most studies focused on understanding factors such as risk due to security concerns, delivery costs and shipping problems and lack of confidence in product evaluation (Gupta, Su, Walter, 2004). Garbarino and Strahilevitz (2004) found that women perceived higher risks online and tended to perceive greater severity to both the consequences and likelihood of failure regarding credit card misuse, fraudulent sites and loss of privacy. It is evident that during the early stages of online adoption that trust was a major deterrent of online shopping, so therefore it became a widely researched area regarding online shopping (Cyr *et al.*, 2007, Palvia, 2009, Gefen and Straub, 2003). Technological advances online have improved security levels, with many retailers adding features that would increase customer confidence such as the tangible and intangible security features below indicted by Halaweh and Fidler (2008). Almost half of the features noted were intangible stressing the importance for retailers to build a reputation and brand.

Figure 15. Security features in e-commerce website

Security features in e-commerce website	Categorizing of security features
Padlock	Tangible
Security certificate	Tangible
Transferring between interfaces of the web-site Website presentation	Tangible
Security policy	Tangible
Acknowledgment via email	Tangible
Third party symbols	Tangible
Physical address , telephone # and email	Tangible
Brief description of the security issues that the customer should be aware of on the website	Tangible
Known identity (company has physical building, i.e. Bank)	Intangible
Support password system	Tangible
Well-known electronic payment gateway such as PayPal	Tangible-Intangible
Famous brand/company	Intangible
International	Intangible
Recognized	Intangible
Trusted	Intangible
Well-known	Intangible
Formal website	Intangible
Respected company, large size	Intangible
Reputable	Intangible
Well-rated	Intangible

Source: Halaweh and Fidler (2008)

Similar findings to Halweh and Fideler (2008) study confirm to build trust online a secure internet environment is essential (Johnson, 2007) and that privacy assurance, usability and a well designed website has a positive impact on user online trust (Chen and Dibb, 2010). Bart *et al.,* (2005: p134) state that online trust *'includes consumer perceptions of how the site would deliver on expectations, how believable the sites information is, and how much confidence the site commands'*. For multichannel retailers, the physical presence of the retailer may enhance online trust. However it can be argued that pure play retailers can build trust by establishing a strong brand image and marketing campaign as this can reduce uncertainly and increase purchase intent, with ASOS and Net-a-porter substantiating this (Park and Lennon, 2009). A further challenge to traditional bricks and mortar retailers is the move by pure players such as eBay, Etsy, Piperlime and Bonobos into opening physical stores. Born online, these retailers are better placed to integrate digital innovations into the physical environment and provide a stimulating and effective shopping environment for consumers.

6.3.2 Bricks and Clicks

Bricks and clicks was an expression introduced by academics, to introduce the hybrid approach of a bricks and mortar and a click businesses (Gulati and Garino, 2000). After the dot.com downturn in 2000, valuable lessons were learned, such as that having an established brand provides significant advantages in online retail, playing a part in customer loyalty and increasing profits (Dennis *et al*., 2004). Many academics have argued that the clicks and bricks approach is more successful than pure play (Min and Wolfinbarger, 2005). Turban and King (2003) describe a bricks and click retailer as an organisation that conducts some ecommerce activities; a bricks and mortar retailer with an added-on transactional website.

Traditional UK bricks and mortar retailers had been reluctant to embrace internet technologies (Marciniak and Bruce, 2004), so bricks and clicks partnerships were established, for example Marks and Spencer and Amazon. Marks and Spencer's in-house team designed a new website which was launched in 2007 in conjunction with Amazon, using some of Amazons website's ideas, such as showing recently viewed items and recommending items based on your previous browsing. The website developed with Amazon had the widest selection of clothing in the UK. Online sales grew by more than 60% in 2006/07 with over 55 million visits and profits reached over £100 million (Marks and Spencer.com) so M&S wanted to continue to grow the business but felt it needed support from an experienced ecommerce business. Under the terms of the agreement, Amazon Services Europe hosted and provided the technology behind the Marks and Spencer branded website and its in-store and telephone ordering and customer services systems, and Marks and Spencer remained responsible for the management of its website, customer service operations, warehousing and distribution. However in February 2014, M&S launched its £150m website, terminating its seven year contract with Amazon. Marks & Spencer executive director of multichannel ecommerce Laura Wade-Gery told Retail Week *"We've been renting the car rather than owning it. Amazon fundamentally sells everything as if it is a book and Amazon is pure-play only, meaning [the M&S ecommerce site] has tortured the system".* In a clicks and mortar arrangement, it is vital that both the online and offline partner share a cohesive understanding of what the partnerships value is to the user (Lindstrom, 2001). She believed that Amazon is designed from a pure play perspective and their new website is aimed to help their international expansion and multichannel business. This move from M&S highlights the change in online fashion retailing, that it is no longer just seen as an additional selling channel but as an integral part of a retailer's growth strategy.

6.3.3 Multi-channel Retailing

The definition of multichannel retailing varies throughout academic literature, with the very basic understanding being the availability to purchase both online (the internet) and offline (the physical store) (Bock, Lee, Kuan, and Kim, 2012; Hsiao, Yen, Li 2012; Jones and Runyan, 2013; Kollmann, Kuckertz, and Kayser, 2012). Certain studies expand on this and triangulate the mix with a third channel such as the telephone (Sousa and Voss, 2012), catalogue (Verhoef et al., 2007a) or both (V. Kumar and Venkatesan, 2005).

There have been a number of academics that have reported the significance of multichannel strategies, especially since the option of the online channel emerged over a decade ago (Rosenbloom, 2007; Burt and Sparks, 2003; Merrilees and Fenech, 2007). Multi-channel strategies are important from a business and consumer perspective (Slack, Rowley and Coles, 2008). Customers are more sophisticated in their use of different channels and expect a transactional website. Multi-channel integration provides the platform to create a greater customer experience that is consistent across channels (Goersch, 2002). However the retailer's task of co-ordinating and integrating channels provides many challenging issues. Rosenbloom (2007) lists several challenges multi-channel retailers need to overcome, such as creating synergies across channels, building strategic alliances, finding an optimal channel mix, creating sustainable competitive advantages, dealing with conflict and providing the leadership necessary to attain well integrated multiple channels. Noble, Griffith and Weinberger (2005) note that synchronizing multiple channels greatly increases market strategy complexity, raising issues such as multichannel pricing, branding and consumer behaviour.

To increase market share and expand across consumer segments many retailers are adopting a multi-channel strategy, leveraging their presence across multiple channels (Min and Wolfinbarger, 2005). Consumer purchasing patterns have changed significantly with many consumers using the internet to look for ideas and inspiration, to compare prices and to find new retailers and brands. The internet has allowed consumers to shop from a global market. The fashion retail market is no longer monopolised by a few big players, it is an international market made up of multiple retailers, value, luxury and independent brands. The accessibility to be able to shop whenever a consumer desires will contribute to the rising sales of many multichannel retailers. The challenge for retailers is join up offline and online channels, to increase sales across channels, improve the customer shopping experience and increase expose of their brand. The boundaries between physical store retailing and online retailing are blurring, with more fashion retailers looking at digital initiatives to attract more people into their stores. Recognising changing shopping patterns, the majority of retailers have been looking to make significant investment into their multichannel propositions. This has predominantly involved a refresh of online propositions, but has also extended to integrating new technology and extending fulfilment options.

Theoretically the successful integration of a multichannel retail business should allow for the searching of product information in one channel, product purchase though a second channel and subsequent delivery or pick-up of the product through a third channel. Yet despite multichannel retail championing the proliferation of channels, the current level of retail channel integration between channels is still very low (Oh, Teo, and Sambamurthy, 2012). Oh *et al.*, (2012) constructs six retail channel integration dimensions to measure the capabilities of a multichannel offer, including:

- **Promotion** - advertising and publicity.
- **Transaction information management** - availability of online and offline transaction information across channels.
- **Product and pricing information management** - consistent information across channels.
- **Information access** - cross-channel information access.
- **Order fulfillment** - ability for the customer to define delivery/collection/payment channel.

- **Customer service** - access to support whatever the consumers chosen channel.

The successful categorisation of a multichannel retailer is dependent on the fulfillment of one or more of the dimensions.

The lack of inclusion of emerging channels and subsequent investigation into their effect on the multichannel retailing have been argued as irrelevant, citing low adoption in comparison to the major channels (Konus, Verhoef, and Neslin, 2008). However the need for further research into these emerging channels and their inclusion within the multichannel marketing mix – such as M-commerce and TV selling – is highlighted as fundamental for a more robust understanding of multichannel shopping (Dholakia, Zhao, and Dholakia, 2005; Hsiao et al., 2012.)

6.3.4 Omni-channel retailing

As a result of the changes to modern retailing the evolution has also given rise to a new retailing strategy termed 'omnichannel' (Elliott, Twynam and Connell, 2012). Omnichannel retailing may be regarded as an advancement of the integrated multichannel concept. Presently, an omnichannel approach is also one of the most significant drivers of retail growth, with consumers demanding an integrated experience, regardless of the channel mix they choose to select (Euromonitor GMID, 2012). The significance of the meaning is stemmed from recognising that more than 56 percent of consumers are now accessing multiple channels such as online, catalogue, mobile and store to make retail purchases (Jones and Kim, 2010). Omnichannel retailing can act as a future competitive advantage for a retailer (Thoughtworks, 2011). According to (IDC Retail Insights, 2010; Bodhani, 2012; SAP, 2011) research indicates that omni consumers will spend 20 percent more than their multi-channel counterparts. Therefore it is useful to understand what are the key drivers behind omnichannel retailing.

What is clear from examination of the scholarly literature to date is that there is a paucity of research and insight available on omnichannel as a construct. Empirical literature on retail mediums has continued to focus investigation upon the study of retail channels in isolation of one another for example (Nicholson, Clarke and Blakemore, 2002; Hsieh et al., 2012) rather than offering a more cohesive and customer-centric view. Whilst the phenomenon has received fervent attention from retailers, academia has yet to acknowledge the term "omnichannel". Thus a debate has emerged as to whether omnichannel is simply an industry myth or a legitimate concept that signifies an important evolution in academic research.

An interest in omnichannel has been triggered by the fact that marketers and retailers have the potential and in effect an obligation to encourage consumers to explore new retail channels. This may be achieved through the development of omnichannel marketing messages that interlink with the consumers' motivations to use a particular channel for a specific purpose and any the interrelationships that consumers believe to exist between channels

Firms should no longer focus on managing channels in isolation of one another (Hsieh *et al.,* 2012) this is due to the fact that consumers have a single perception of a company and do not view a firm's divisions as separate operating units (Piercy, 2012) and today's business models are reflecting this (Schoenbachler and Gordon, 2002). In future retail directors will be expected manage the transition away from single channels to a combined multichannel operations (Elliott, Twynam and Connell, 2012). The extent of this will not simply cover traditional channels such as online website but will hold a far wider remit to support the on-going introduction of new channels so that the complete customer journey can be owned by omnichannel directors (Elliott, Twynam and Connell, 2012). Increasingly, senior management appointments to UK retailers are demanding leaders with experience in multichannel management. This demonstrates that there is growth towards cross-channel management (Kim, Park and Pookulangara, 2005), which somewhat responds to call that firms were lacking in coordinated management of cross channels.

The ability for organisations to integrate their information technologies, systems and resources will enhance the customer relationship (Oh, Teo and Sambamurthy, 2012). Furthermore, the consequences of not adopting such an approach presents too great a risk for retailers. Piercy (2012) states that consumers can and will take a negative experience from an online channel and translate this as a perception in an offline division, further adding that the negative extent of translating cross channel perceptions is still worryingly unknown.

6.4 Towards a Definition of Omni-Channel Retailing

Retail channels no longer work independently of one another but consist of multiple channel interactions within a single customer journey. Indeed a consumer will experience on average approximately 56 interactions with a series of retail channels and touch points between first interest and eventual purchase transaction (Thompson, Ed; Gartner, 2007; Cisco, 2010). Based upon the literature examined omnichannel retailing may be defined as an advanced and integrated cross channel customer experience (Elliott, Twynam and Connell, 2012). Moreover, omnichannel retailing denotes a ubiquitous shopping experience for consumers whereby multiple channels and devices will be used (Thoughtworks, 2011).

The development of this new mode of retailing in fact stemmed from fashion retailers and so provides added context to this paper. UK retail owner Aurora Fashions was one of the primary retail organisations to use the term "omnichannel" to identify a single customer journey across multiple channel interactions (Drapers, 2013). Some of the most successful British retailers have begun to invest and implement an omni strategy with promising results (Marketing Week, 2013) thus stimulating a need for timely investigation. Despite this, research by Kurt Salmon (2012) indicates that whilst a number of high performing UK fashion retailers are adopting an omnichannel approach, not one of the organisations surveyed demonstrated best practice across all consumer touch-points.

Academic literature has not yet offered a specific definition for omnichannel retailing therefore some themes of omnichannel are explored in place of a formal definition below:

6.4.1 Simultaneous Channel Usage

Mobiles are an example of one technology being integrated into the physical store experience (Google, 2013). Research results by industry analysts A.T. Kearney (2012) identify that it is increasingly the norm for the majority of consumers to regularly engage in simultaneous use of retail shopping channels and this presents new and unique opportunities. This is supported by academic findings from Schramm-Klein (2011) who identify that it is common for retailers to use channels simultaneously to interact with consumers. The use of multiple channels in conjunction with one another is even more evident with younger consumers who more frequently engage in this activity (AT Kearney, 2012).

6.4.2 Connectedness

Connected consumers are part of an evolved omniretail ecosystem (Aubrey and Judge, 2012) thus bolstering the argument of this investigation that a multichannel and an omnichannel approach possess different features. The connected consumer describes a highly customer-centric and agile retail environment (Forrester, 2013; Berman and Kesterson-Townes, 2012; Deloitte, 2012) and also describes consumers who are willing to exploit a number of retail channels via digital means (Aubrey and Judge, 2012;Forrester, 2013).

Stereotypically a connected consumer maybe described as demonstrating a number of other characteristics as identified in Table 9.

Table 9. Connected Consumer Characteristics

Characteristics	Citation
Actively participating in social media	(Berman and Kesterson-Townes, 2012) (Deloitte, 2012) (Forrester, 2013)
Empowered	(Berman and Kesterson-Townes, 2012) (Deloitte, 2012)
Informed	(Deloitte, 2012)
Interacting with user generated sites and content e.g. review sites	(Berman and Kesterson-Townes, 2012)
Promiscuous, lacking loyalty	(Deloitte, 2012)
Receptive to digital channels	(Aubrey and Judge, 2012)
Seeking personalised experiences from retail interactions	(Berman and Kesterson-Townes, 2012)
Time poor	(Deloitte, 2012)
Viewing a variety of types of media content	(Berman and Kesterson-Townes, 2012)

Not only are connected consumers accessing multiple channels to shop they are also described as intelligent and empowered, choosing to take control of their customer journey through using a variety of shopping mediums (Aubrey and Judge, 2012; IBM, 2013; Deloitte, 2012). This notion is exemplified by the fact that shoppers are now more judicious in their purchasing behaviour by conducting research prior to purchase and considering a wider range of information, examining user reviews and seeking advice (Aubrey and Judge, 2012). Shoppers are also more efficient with their shopping tasks by browsing in store then ordering at in-store web kiosk (Aubrey and Judge, 2012). Some 50% of global mainstream consumers have embraced digital consumption behaviour (Berman and Kesterson-Townes, 2012), with as much as 83% of UK consumers regularly access the Internet and are likely to own multiple devices (64% laptop, 52% smartphone and 12% tablet) (Forrester, 2013). Indeed consumers now expect to enjoy only the very latest of technology in any digital retail offering (Deloitte, 2012).

6.4.3 Single View of the Customer

Businesses operating across channels should be customer-centric (Schoenbachler and Gordon, 2002). A single view of the customer is achieved through the means of data integration across channels and ultimately contributes to satisfaction (Hsieh *et al.,* 2012; Berman and Thelen, 2004). Usefully the integrated data, which offers a single customer view, provides commercial benefits for retailers through developing across channel insights, generating more accurate customer profiles and targeting (Deloitte, 2012). However developing a single customer view incurs cost to the retailer (Grewal *et al.,* 2011). It is argued that a single customer view is better placed within the omnichannel retailing context rather than multi-channel. A single view of the customer takes account of the complete customer journey and insights rather than simply combining insights from multiple channels.

6.4.4 Seamlessness

A retail experience should be seamless and consistent throughout a users shopping experience (Aubrey and Judge, 2012; Berman and Kesterson-Townes, 2012; PriceWaterhouseCoopers, 2012; Gartner, 2011). Seamless integration of multiple retail channels recognises a progression within modern retailing and one that is beyond a standard multichannel approach. This is because omnichannel strategy is concerned with looking at consumers combined channel experiences rather than examining channels in parallel with one another. The importance of seamlessness has even been cited as an important factor when discussing nuanced themes of omnichannel retailing. For example cross channel behaviour requires integration to create a seamless offering (Retail Systems Research, 2008). The benefits of a seamless experience is that it is one which induces loyalty amongst shoppers and thus encourages increased consumer spend (Thoughtworks, 2011).

6.4.5 Consistency

Consumers are increasingly aware of their shopping options, often comparing and contrasting a retailer’s channels. Inconsistencies between channels produce a negative impression of a retailer (Tate and Johnstone, 2011), with consumers more likely to frequent a channel when they consider it to be higher quality (Oppewal, Tojib, and Louvieris, 2012). Previous studies demonstrate that the consumer is unafraid to switch to a different brand or retailer entirely when encountering what they consider to be an inadequate channel experience (Luo, Chen, Ching, and Liu, 2011). Also there is an under-researched suggestion that situational variables are a major influence in the channel selection process (Nicholson *et al.,* 2002). From an omnichannel perspective there needs to be a level of consistency throughout each channel so that consumers can move flexibly between the channels and have a positive perception of the retailer throughout the experience. Importantly, should retailers not offer a level of consistency across their channels shoppers would actively avoid them (PriceWaterhouseCoopers, 2012). Retailers must therefore aim to reduce the number of challenges associated with moving channels to satisfy consumers and information consistency and integration (Hsieh *et al.,* 2012).

There is still a need for physical retail locations, but since the majority of high street retailers have moved online, a transactional retail website is vital to keep up with competition. The key for fashion retailers is to ensure that synergies with online retailing are exploited to drive footfall to stores. It is essential that consumers are given choice by establishing strong links between the in-store and online offer. Online retailing cannot just emulate the physical shopping experience; retailers need to design the online shopping experience to create a consistent message, looking at design features that create a likeness and perform a similar function to the physical shopping environment. A well-integrated omnichannel format is important for retailers as it could result in increased customer base, higher market share and added revenue. However the task of coordinating and managing both channels efficiently and effectively is a challenge for retailers. Previously retailers opted for partnerships and ran and managed channels separately. Retailers need to integrate their channels and make them consistent, giving online shoppers incentives to stay with the same retailer when they switch channels (Gorsch, 2000). Omnichannel retailing is a business approach, a strategic process to retain a strong brand from channel to channel in a highly competitive market. To achieve integration a holistic approach is necessary, designing and marketing the channels as a whole and having one overall business strategy rather than individual channels as separate entities.

In summary this section has evaluated the evolution of online retailing and how it has been integrated into a retail strategy. The analysis demonstrates that it has been a process that has developed from in the beginning a channel that was added on to a business reacting to consumer demand, to now being integrated to offer an omnichannel channel offering. The next section will evaluate the multichannel consumer to gain a better understanding about shopping behaviours and what channels consumers are using and why.

7. Profiling the modern day multichannel consumer

The multichannel consumer is defined as one who regularly use and purchase from multiple retail channels (Fernández-Sabiote and Román, 2012). With both the mean revenue and customer value of a multichannel consumer increasing incrementally in relation to the number of channels adopted (Kumar and Venkatesan, 2005). Interaction with a retailer via multiple channels is found to form stronger relationships, increased trust and lower consumer perception of risk (Kumar and Venkatesan, 2005), furthermore, Venkatesan *et al.*, (2007) and Gensler, Dekimpe, and Skiera (2007) found that the consumers with higher purchase frequency and spending levels (heavy users) have a greater preference for multiple channels.

Despite embracing online shopping, the multichannel consumer is found to be fairly mainstream in their technical capabilities, demonstrating an even bias across channel preference and less technical ability than consumers who prefer to shop solely online (Mcgoldrick and Collins, 2007). However the use of multiple channels within the pathway to purchase is actually found to positively enhance feelings of intelligence in shoppers (Hsiao *et al.,* 2012). McGoldrick *et al.,* (2007) more recent studies have demonstrated that multichannel shoppers who favour online channels have a tendency to be highly experienced, educated and younger demographic, demonstrating an increased transaction volume (Sousa and Voss, 2012). For a successful omnichannel approach to be achieved there is an increasing need for a better understanding of shoppers (PriceWaterhouseCoopers, 2012) and not just the operational impact of the approach itself. Konus, Verhoef and Neslin, (2008) states that it is important for marketers to identify and understand segments. There is an abundance of multichannel segmentation literature available. (Konus, Verhoef and Neslin, 2008; Verhoef, Neslin and Vroomen, 2007; Neslin and Shankar, 2009; Mcgoldrick and Collins, 2007; Kushwaha and Shankar, 2013) yet there is no existing research to acknowledge any segmentation in relation to omnichannel shopping.

Customers found to purchase via multiple categories of a retailer are more likely to be open to new channels and migration between channels (Kumar *et al.,* 2005). These multichannel enthusiasts are notably disloyal to retailers (Konus *et al.,* 2008), especially for a customer with a preference for a retailers online channel, as upon receiving dissatisfactory service they are more likely to switch to a competitors online channel than choose another channel within their initial brand (Sousa and Voss, 2012). As within the channel adoption process multichannel consumers are often found to compare and contrast the consistency and excellence of service between organisations (e.g. competitor retailers and brands) and across the various channels within a single organisation (Tate and Johnstone, 2011), however, "*increasingly it is necessary to think in terms of channels within retailers, rather than retailers within channels"* (Mcgoldrick and Collins, 2007; p.155). Internet shopping is commonly thought of for functional repeat purchases only, whereas shopping in store is primarily a social experience (Nicholson, Clarke, and Blakemore, 2002).

Many academic studies have focused on the multichannel consumer by characterising the consumer group (Konus, Verhoef, and Neslin, 2008; Kumar, Eidem, and Perdomo, 2012; Mcgoldrick and Collins, 2007), understanding channel choice (Balasubramanian et al., 2005; Chiu, Hsieh, Roan, Tseng, and Hsieh, 2011; Kollmann, Kuckertz, and Kayser, 2012; Piercy, 2012) and analysing the impact and effect of the multichannel environment (Choi and Park, 2006; Dholakia, Zhao, and Dholakia, 2005; Keller, 2010; Neslin and Shankar, 2009). Nicholson, Clarke, and Blakemore (2002) specifically examined the positive and negative influences on a multichannel consumers' purchase channel choice through the measurement of the following five Belkian dimensions: physical setting, social setting, temporal perspective, task definition and antecedent states. However, despite focusing primarily on a comparison between the three channels (store, online, offline catalogue), the study acknowledges the increasing use of multiple channels within the purchase channel decision e.g. shopping in a catalogue, and then using the website to make the final purchase; yet the research struggles to fully capture the reasoning behind this behaviour. Several behaviours unique to a consumer shopping within a multichannel environment have been found, the following four are most relevant due to their potential application in the use of multiple channels within a single shopping experience (e.g. within omnichannel retailing), the existing findings follow.

7.1 Channel switching

Channel switching is a proactive consumer-led decision whereby a consumer changes from using one retail channel to a different retail channel (Pookulangara, Hawley, and Xiao, 2011). Pookulangara *et al.,* (2011) found switching to be heavily influenced by utilitarian gains, often dictated by price, energy and time-saving factors. Cross channel behaviour principally describes purchasing across multiple retail mediums and how retailers are at risk to cross channel retaliation by consumers (Piercy, 2012). Cross channel retaliation occurs when a consumer, who has an experience in one channel, then projects this positive or negative experience or perception onto another channel (Piercy, 2012). Consumers who stereotypically exhibit positive cross channel behaviour includes the following consumers; females, highly involved, highly loyal or experienced with retailer brand (Piercy, 2012).

Since retail shoppers are now channel agnostic (Gartner, 2009; Gartner, 2011) it is likewise a goal for retailers to be channel agnostic in their delivery of a retail offering (Adelaar and Müller-Lankenau, 2005; Steinfeld, 2002). A channel-agnostic approach is way of describing a consumer's omnichannel customer experience (PriceWaterhouseCoopers, 2012). Retailing is now about the complete customer experience and takes into account the multiple interactions with the retail organisation rather than consumers experiences of individual channels (BT, 2008). Moreover it is now an expectation of consumers that retailers have an understanding of every retailer-consumer interaction, regardless of channel source (BT, 2008). To implement an agnostic strategy business process architecture must operate across all channels and be unspecific to any one retail medium (Zimmerman *et al.*, 2005). For customers, the outcome is that they should be able to select a channel or combination of retail mediums to best suit their needs (Steinfeld, 2002) and do so during whichever transaction phases that they wish (Adelaar and Müller-Lankenau, 2005). Young consumers are particularly labelled as channel-agnostic as they are digital natives (Aubrey and Judge, 2012). Aubrey and Judge (2012) state that young consumers are particularly indifferent as to where they buy from. At present issues being examined within the theme of cross channel behaviour include how the offline channel induces consumer trust in another channel and channel cannibalization (Piercy, 2012). Cross channel behaviour fits with omnichannel more closely than multichannel retailing due to it taking account not only of multiple channel interactions but also the relationships and transferable perceptions between channels which hints at studying the overall customer journey.

7.2 Researching online

Research shopping is the behavior of researching a purchase in one channel and purchasing through a separate channel. This can be caused by the consumer's perception of one channel providing a better solution for certain tasks e.g. the belief that the online channel is more effective searching (Verhoef et al., 2007). The greatest tendency for research shopping is found in multichannel shoppers (Konus *et al.,* 2008). And new technologies play an active role within the formation of this consumer behaviour, specifically the female Generation Y consumer. It has been found that social networking sites are now considered to be part of the research shopping journey, often functioning in the same way a consumer might consult a shopping website or catalogue (Ruane and Wallace, 2013). The act of 'shopping around' in itself is primarily viewed as aggressive by nature, often allowing consumers to find their desired product for a more competitive purchase offer through a rival retailer. However, consumers that establish loyalty to a singular brand or retailer also exhibit research shopping tendencies by researching multiple channels of a single retailer (Neslin and Shankar, 2009), thus demonstrating the complexity of the behaviour.

7.3 Browsing

The act of browsing primarily fulfils a hedonic need, increasing pleasure and fun (Luo, Chen, Ching, and Liu, 2011). Research body eMarketer (2013) estimates that in 2013 over half of digitally enabled shoppers, now favour browsing when using smartphones and although not equal the popularity of browsing using a tablet is an area of growth also. The behaviour of browsing has previously been viewed as a negative trait that retailers should aim to override (Kim, Galliers, Shin, Ryoo, and Kim, 2012) owing to the ability for a customer to abandon their search and potential purchase. Countering this, Wang (2010) discovered that despite the act of browsing impacting the experience of male and female consumers differently, for both genders browsing did positively influence patronage intentions. Therefore there is an understandable questioning of whether the traditional success metrics – such as traffic conversion and sales – are comprehensive in the context of multichannel retailing (Shankar, Inman, Mantrala, Kelley, and Rizley, 2011). Analysis of the increasingly complex usage and the relationships formed within the adoption of multiple shopping channels are needed to understand the true value of success within the omnichannel retail journey.

7.4 Multi-device ownership

Multi-device ownership and use has grown with the increasing affordability and accessibility of personal technology; illustrated by the fact that 35% offline sales can be influenced by online research (Google, 2011), for example: through the use of a smartphone whilst shopping in-store. Now over three quarters of consumers have reported the use of multiple devices within the shopping process (Google, 2012), with a trend for the simultaneous usage of devices (comScore, 2012a) such as the use of a smartphone and tablet device at the same time. The smartphone is found to be the most frequently used device with which to begin a path to purchase that is then continued on a another device (Google, 2012).

A recent industry study by Microsoft (2013) segmented multi-device behaviour into four distinct activities:

- **Content Grazing** - multi-tasking simultaneous usage with undefined purpose.
- **Investigative Spider-Webbing** - multi-tasking simultaneous usage with a defined goal.
- **Social Spider-Webbing** – simultaneous usage, for the purpose of sharing content and connecting with other users.
- **Quantum** – sequential and intent-based usage

Interestingly, shopping is found to be a dominant activity for the users displaying either Quantum or Social Spider-Webbing multi-device traits. However from an academic perspective this area is found to have a large deficit in the literature on the simultaneous and sequential usage of channels and a subsequent lack of understanding in the variable interrelationships, due in part to the need for a framework tailored to analyse these factors (Nicholson *et al.*, 2002).

7.4 Channel adoption

The early development of multi-channel strategy was driven by the online domain (Zhang et al., 2010) where websites were seen merely as a solo channel and not as a physical extension of the store experience (Kim and Park, 2005). There was also a debate as to whether the digital channel would supersede and catalyse the demise of the traditional store channel (Hart, Doherty and Ellis-Chadwick, 2000). However today the ideal is for retail channels to work in symphony as a means of "future-proofing" a retail business (McGoldrick and Collins, 2007; Deloitte, 2012; Bodhani, 2012; Nicholson, Clarke and Blakemore, 2002). As a result the retailer agenda should now be concerned with optimising the consumers shopping experience by organising complementary functions across multiple channels (Hsaio, Yen and Li, 2012). It is therefore suggested that it is critical to understand how each channel is important to the consumer and how individuals use and shop across multiple channels.

The significance of consumers combining channels, is that rather than bolstering the demise of traditional channels it is in fact helping to redefine the purpose of the retail store experience; whereas the store was previously threatened by the rise of the digital era, now new in-store technology is enhancing the traditional store shopping experience (Bodhani, 2012). Oppenwal *et al.*, (2012) state that understanding how consumers mix channels, how channels work together or compete in different contexts allows more knowledge to be gained about these particular consumers. Yet regardless of the combination used particularly when moving from offline to online multichannel retailers need to provide a consistent experience, regardless of purchase stage i.e. a transaction or simply browsing for a product (Hahn and Kim, 2009). However retailing has progressed and the need for combining a range of channels has largely been triggered by changing consumer lifestyles (Nicholson, Clarke and Blakemore, 2002). Today's consumer will now move back and forth between an array of channels before making a purchase (Google, 2012). Current literature studies have shifted from looking at single-channel preferences to now looking to how consumers mix channels e.g. (Gensler, Verhoef and Böhm, 2012). In line with omnichannel Gensler, Verhoef and Böhm, (2012) argue that an integrative examination of channel usage is important as channel attributes, channel experience and shopping channel spill-over effects (the influence of using a channel at one stage and its affect on influencing same channel usage in the next stage of purchase) can affect consumer channel choice throughout a shopping experience.

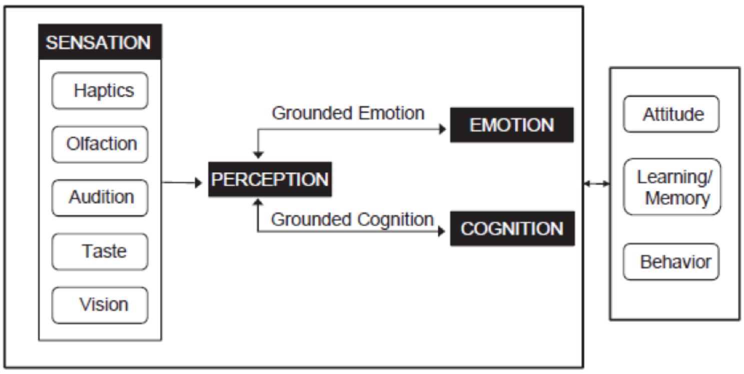
Observations record that contexts such as the time and location may affect the channel choice of a consumer (Google, 2012; Nicholson *et al.*, 2002). However it must be highlighted that most multichannel consumers only adopt cross channel usage with a select number of retailers and that only 5% of multichannel customers shop with more than 5 retailers through multiple channels often chosen through prior consumer preference e.g. multichannel shoppers choose to do so only with their favoured retailers (PwC, 2013); thus correlating with literature that associates the usage of multiple channels with the formation of deeper relationships and increased trust in their capabilities (Kumar and Venkatesan, 2005). This is crucial for retailers as the major consumer characteristics influencing the adoption of a channel is formed upon the individuals' aversion to, or acceptance of the risks involved (van Dijk, Minocha, and Laing, 2006). As internet enabled devices become more ubiquitous their role becomes habitual, leading to increased usage for relaxation and time-killing, activities that are strongly linked to increased escapism and pleasurable motives (Microsoft, 2013). Furthermore the Nicholson's *et al.*, (2002) findings are now over a decade old, discounting recent technological advancements such as social commerce. The ability to use '*Web 2.0 social media technologies and infrastructure to support online interactions and user contributions to assist in the acquisition of products and services'* (Liang and Turban, 2011; p. 155), leveraging online interactivity within the online shopping arena and increasing the potential for hedonic shopping experiences online.

Currently research is calling for a heightened understanding of how consumers make choices in relation to the ever-increasing variety of retail channels that are currently available to them (Wang, Song and Yang, 2012). Importantly there are few studies, which look at how consumers use channels in combination with one another (Oppenwal, Tojib and Louvieris, 2012). Poloian (2009) emphasises that retailers must understand how each of the channels are used by customers, as retailing is more than a mechanical transaction of goods or services in exchange for money, it is a means of providing value. Recent studies show that the modern consumers online time is now spread between four primary media devices; PC and/or laptop, TV, tablet computer and smartphones (Aimia, 2011; comScore, 2013a; Google, 2012; PwC, 2013), however despite the emergence of these digitally focused channels this has yet to take away from the prominence of the physical store which is still makes up the majority of the UK fashion retail market sales. Currently 6% percent of UK instore sales are currently influenced by mobile channel with expectations set to increase in value to £36 billion pounds by 2016 (Deloitte Digital, 2012). Further, offline channels such as catalogues and television shopping channels, still contribute but are more targeted to specific consumer segments, each channel will be discussed, divided by the clarification of the channels as either ‘online’ or ‘offline’, as this became the most frequently observed overarching categorisation in the literature relating to the understanding of multiple channel usage within retail (Bock *et al.,* 2012; Hsiao *et al.,* 2012; Jones and Runyan, 2013; Kollmann *et al.,* 2012).

7.4.1 Offline: Physical store

The emphasis of the store as a destination, enhancing the experiential physical nature is crucial when competing with online retailers (Parasuraman, Baker, Grewal, and Voss, 2002). The changing role of the high street has previously been discussed. However, in the UK, shopping centres are also progressing towards a more lifestyle-orientated experience in the current climate. Retail design has been researched by academics for decades, with research finding the importance of design elements such as the layout, colours and music but more recently a store-as-a-brand strategy, particularly in fashion, becoming more prevalent (Floor, 2006; Kumar and Kim, 2014). Retailers such as Ambercrobmie and Fitch, Hollister, Victoria’s Secret, Zara and Topshop are among those that are branding their stores using atmospheric stimuli, employees and merchandise to create distinctive store images. It is evident that the store environment influences consumer behavior by creating experiences in store that influence emotions, cognitions and responses (Kotler, 1972, Bitner, 1992; Turley and Chebat, 2002). Some of the more traditional understandings of experience do not include social aspects in their definition, however more recent conceptualisations such as Verhoef *et al.,* (2009) and Gentile *et al.,* (2007) do. Social interactions can be interactions with staff and other consumers in-store. Hu and Jasper (2006) believe that retail stores should be planned appropriately as places for socialising and leisure as well as for purchasing. Brand community and dialogue are an important part of the social experience in store that lead to developing a greater relationship between retailer and customer. As clothing is an experiential product, being able to create a strong interactive and hedonic atmosphere for consumers is important to enabling purchase intention (Porat and Tractinsky, 2012). Krishna (2011, p2) when researching marketing in a broader sense defines sensorial marketing as ‘*marketing that engages the consumers’ senses and affects their perception, judgement and behaviour’.* Figure 16 is developed from both psychology and from marketing, which considers how the five senses affect consumers perceptions, finding that by stimulating senses companies can create competitive advantage, improve brand identity, create memorable experience, increase time spent in the store and create stronger relationship with consumers (Krishna, 2011)

Figure 16 - A conceptual framework of sensory strategy



Source: Krishna, 2011

It is also important to note the issue of sensory overload and conflict, however there is currently little research in this area. Abercrombie and Fitch and Hollister are two US brands that have adopted the store-as-a-brand strategy. The Hollister store for example has a porch outside the shop entrance, with a pitched, tiled roof and wooden fencing, which represents a surf hut to reinforce the Hollister brand image. Inside the stores have a theatrical setting, with low lighting and a perfumed scent throughout. The stores are very distinctive and even without large signage on the outside, the exterior, scent and lighting entice customers into the store and once inside the majority of the clothing is branded with the Hollister logo.

This movement towards a branded fashion store is influenced by the fashion market now being globally competitive and the high street becoming more polarised, with many retailers selling similar products, targeting the same customers, therefore the retail store can be used as a way to differentiate from competitors offering a unique and distinctive shopping environment (Floor, 2007). Mintel's (2011) multichannel report highlighted the majority of customers (36%) were found to favour the tactile retail experience of the store and had underlying fears about the lack of security when shopping online. Interestingly it was the younger customer segment that are more often considered ‘tech savvy’ 15-24 year that were more heavily in favour of the tactile retail experience, highlighting the ongoing relevance of the store for a consumer group whom are likely to shape the future of omnichannel retailing.

7.4.2 Offline: Catalogue
Despite being the oldest form of distance selling in the UK, with origins traced back to the 19th century, UK catalogue shopping has been in decline for almost a decade (Mail Order Traders’ Association, 2006; Mintel, 2011). Home shopping decreased by 7% in value sales in 2012 (Euromonitor, 2013). Many solely catalogue based retailers are now repositioning with e-commerce model, such as fashion retailer Simply Be. The premise of catalogue retailing is often viewed as obsolete, where the main consumers of home hopping continue to be older consumers, for example; housewives (Euromonitor, 2013). However, the platform retains value as a branding device and an effective tool with which to drive existing custom online (Keller, 2010) rather than a key channel within the omnichannel retail mix.

7.4.3 Offline: TV shopping
Television shopping is a mass media channel (van Rijnsoever, Castaldi, and Dijst,

2012) that is therefore broadly targeted and provides a rich experience (Dholakia *et al.,* 2010). It is still the single most popular past time, with 95% of the UK regularly watching on a weekly basis. TV shopping is seeing signs of growth (Euromonitor, 2013) however this may be due to the advent of broadband enabled 'smart TV' that allows access to the internet. Concurrently the TV viewing habits of the UK are migrating online with almost a quarter choosing to fulfill their TV viewing habits online (Ofcom, 2012).

TV shopping retailers are taking heed of this trend, pre-empting potential future struggles in the increasingly digital market by moving into online commerce (Mintel, 2011). Despite being a predominantly offline retail model, the customer still requires a technical skill and inherent understanding in order to complete a TV shopping purchase (Wang and Hsiao, 2012).

Television has evolved into a catalyst (Microsoft, 2013) inducing consumers to visit a web address, stream live online (Berman and Thelen, 2004) or, the increasingly observed consumer initiated behaviour of multi-device usage – for example the use of a laptop to search for further information on a topic triggered by simultaneously watching TV (comScore, 2012; Google, 2012; Microsoft, 2013). Therefore, despite small signs of channel growth, the priority of TV shopping for retailers must be questioned when TV is the least actively consulted channel within the shopping process (van Rijnsoever *et al.,* 2012) and the consumers of TV shopping can be more effectively reached online (Keller, 2010). Especially when the convergence of internet access and television via 'smart TV' (Ofcom, 2012) brings into question which channel a consumer would actually be purchasing from.

7.4.4 Online: Smartphones

Within the UK the majority of consumers have yet made a purchase using their smartphone, however the adoption rate has doubled within the last 12 months (Econsultancy, 2012), with half of UK smartphone owners shopping (e.g. browsing) via their device, and a third continuing to purchase (IMRG, 2012). Recent market research shows a skew towards male smartphone shoppers in the UK with over half of those males being younger than 34 (xAd and Telmetrics, 2013), the report demonstrates that UK users are committed to using the smartphone as a tool for pre-purchase research with 65% of multi-device shoppers beginning their investigations on a smartphone (Google, 2012). Early signs demonstrate that this form of technology has the potential to fulfill a function beyond a purely logistical role, becoming an integral tool in the complexity of the everyday life of the user (Donner and Marsden, 2011), M-commerce is discussed in more depth in section 8.

7.4.5 Online: Tablet

Despite being a relatively new product on the market, tablet devices already account for more web traffic than smartphones on the global scale (Moth, 2013). The relative affordability of the tablet has fuelled its purchase, a displacement of the longstanding desktop PC for use as a primary online consumption method within Western markets (Gartner, 2013). Two thirds of tablet owners have made a purchase from a tablet (IMRG and eDigital Research, 2012) with commerce related queries ranking highly on the device's usage (Song, Ma, Wang, and Wang, 2012). When considering that the smartphone as a device is more widely adopted this may seem surprising. However the similarities in design features between a desktop and a tablet e.g. larger screen, and similar desktop orientation, correlate with findings that consumers are prone to adopt mobile technologies that strongly resemble services they have previously used (de Reuver, Ongena, and Bouwman, 2013). Despite the mobility of the tablet device, they are usually used at home (Google, 2012; Song *et al.,* 2012) the current primary usage being for personal entertainment (Google, 2012). Within academia there is a trend for research into the tablet to be placed in tandem with the smartphone under the broader definition of 'mobile' (Berman, 2012; de Reuver, Ongena, and Bouwman, 2013; Kumar, Eidem, and Perdomo, 2012). However recent observations conclude that tablet usage is uniquely characterised, with owners demonstrating user behavior and intent exclusive to the device (Song *et al.,* 2012). Similarly within the industry the Internet Advertising Bureau is warning retailers who were quick to adopt mobile optimised websites that they now risk alienating tablet consumers by not doing the same, as currently only 8% of the top 50 UK retailers have tablet friendly websites (Corry, 2013). With tablet commerce set to triple in sales this year on global scale (eMarketer, 2013) it is clear that as a channel, tablets will form an important piece of the omnichannel puzzle for retailers. Investigation into how tablets are similarly augmenting the store would be a beneficial avenue of future research, especially when retailers such as Apple and Urban Outfitters are now replacing the traditional point-of-sale, with sales persons operated tablet devices in their UK stores.

7.4.6 Online: Desktop/Laptop

There is already a vast body of research relating to the fixed (e.g. non-mobile) web and its various applications within the online shopping field. With Internet users now found to form an opinion (either positive or negative) on a website within one 20th of a second of viewing the initial webpage (Lindgaard, Fernandes, Dudek, and Brown, 2006) this demonstrates the online environments' huge impact on the consumers decision making process. Within the UK almost forty five million users frequently browse the web via a personal computer (comScore, 2013b). Yet there has been an 11% decrease in worldwide PC shipments during second quarter of 2013 (Gartner, 2013), which brings into question the current dominance of the web via the mobile web using smartphones and tablets.

A review of the existing literature has confirmed the incremental evolution and increasing relevance of omnichannel within the current multichannel retail market. There is a demand for seamless and cohesive cross channel retail experiences from a consumer satisfaction perspective. In the long term this requires a comprehensive understanding of the consumers behaviours across all channels (Berman and Thelen, 2004). Moreover, it will also benefit a retailer's ability to gain maximum insight into a consumers lifetime value and the most beneficial channel synergies. The key finding is the ever increasing blurring of the boundaries between channels (Drapers, 2012; Shankar *et al.,* 2011) where channels were previously viewed as individual silos. Now technology infiltrates the physical store and sociability is incorporated into the online retail space. The literature has revealed several gaps in the analysis of the multichannel retail experience, including a deficit in the analysis of emerging channels as part of the multiple channel shopping experience (Hsiao *et al.,* 2012; Song *et al.,* 2012; Verhoef *et al.,* 2007). Based upon the existing research the key channels for ongoing growth and the area where future research should be conducted in order to understand the relationship between the channels are the retail store, desktop/laptop, smartphone and tablet device.

8. Fashion Retailing Initiatives

As discussed previously multi-channel retail has changed the fashion landscape, as retailers continue to add touch points to reach out to current and new customers to expand their business. It is evident that the Internet, which has enabled e-commerce, has been the main driver of change over the past 15 years. Retailers are now moving towards an omnichannel strategy, which means rather than using each channel separately or individually as in multichannel retail, rather simultaneous use of shopping channels. Berman and Evans (2010, p. 43) state *"Technology is beneficial to retailing relationships if it facilitates a better communication flow between retailers and their customers, as well as between retailers and their suppliers",* more fashion retailers are adopting technology-based innovations in store and online to communicate with customers throughout their shopping journey, in the next section of the paper current technological trends will be discussed.

Technology is crucial in creating an omnichannel strategy to create a seamless unified experience for customers, merging online content and offline sensory experiences providing the *"best of the two worlds"* to enhance the shopper experience and provide the retailer with invaluable information about the consumer shopping process (Lazaris and Vrechopoulos, 2014). A new era of retailing has developed through greater convergence (Deloitte, 2012; Carlson and O'Cass, 2011). Now the role of managing the retailer's brand through the convergence of channels is of paramount importance (Verhoef *et al.,* 2009; Carlson and O'Cass, 2011).

8. 1 M-commerce and Fashion Retail

Consumers using multiple retail channels within their path to purchase are inherently more valuable (Deloitte Research, 2010) and therefore warrant retailer investment in order to gain their patronage. Hedonic products such as fashion, are found to be a significant predictor for the choice of bricks-and-mortar stores due to experiential enjoyment of the channel (Pookulangara *et al*., 2011). This ties with the recent market research that 77 per cent of UK shoppers have 'showroomed' at least once in the last six months (Accenture, 2012) and Google's (2012) findings that 65% of shopping journeys using multiple channels begin on a smartphone device. Therefore it would be beneficial to encourage customers to use their smartphone when shopping on the high street and in the physical store, integrating m-commerce and physical retailing.

8.1.1 Location-based services and communications

The geographic boundary that was once an issue for fashion retailers has been broken down as consumer have access to retailers all over the word, however due to GPS technology it is now easier than ever for retailers to pin point a consumers exact location via their mobile device. Proximity and Location based services are applications that are available when a mobile is close by and tools such as Global Position System (GPS), Radio Frequency IDentificaion (RFID), Near-field Communication (NFC), Wifi, Apps and QR codes can enable retailers to locate customers. GPS is commonly used to provide information about outdoor locations such as specific place locations, traffic statuses and provide directions to destinations, whereas RFID (Radio Frequency IDentificantion) is used for location tracking for indoor smart applications (Kim, Park, Bang and Kim, 2014) both will be discussed with regards to their value for fashion retailers.

8.1.1.1 GPS Applications (apps)
Mobile phones are no longer regarded as a luxury item; Mobile phones are now "*as ubiquitous as landlines*" with a reported 9 out of 10 UK consumers currently owning a mobile phone (Mintel, 2013). The majority of smartphones have a GPS system within the handset, therefore there is a lot of potential for location-based services (LBS) as retailers have the potential to deliver content based on the spatial proximity of the user, providing marketing content that is geographically relevant, therefore more targeted (Farrelly, 2012). Foursquare (foursquare.com) is a LBS application (app) that has over 50 milllion users and nearly 2 million business contacts (Foursquare, 2014). Foursquare allows users to access, create and share information about geographic locations. Content and information are shared by both the retail businesses and customers therefore working on a push and pull basis; customers can upload images or post about a new shop that they have discovered and retailers can post information about up and coming events and send discounts direct to the consumers phone. The value of this type of mobile app is that it creates conversation between consumers and businesses, and the consumer has chosen to engage and make that connection. Farrelly (2014) found that users sought engagement with places, using foursquare to connect, explore, and learn about the history of places and what other people's views and feelings were when they were there previously. Fashion retailers can learn from this type of LBS app that customers want to connect and engage with places including retail stores, and that the value of consumer content and retailer content whilst in a close geographic proximity can encourage browsing, social sharing and buying activities in the physical store.

8.1.1.2 RFID and NFC technology
RFID technology has received a lot of interest in academic papers especially within the logistics and supply chain area, as it supports in-store operations such as tracking inventories, monitoring merchandise sales, stock management and aiding the store management, providing retailers with better inventory management and order accuracy (Azevedo, Prata and Fazendeiro, 2014) (See section 4.4). As well as for logistics and supply chain management RFID can also be used to improve the customer experience. The ability to be able to identify a customer and provide more useful information, save time, as well as customise the consumers' in-store shopping experience is achievable due to technology such as RFID which can be integrated into mirrors, shopping trolleys, labels and scanners (Pantano and Naccarato, 2010). However research on RFID tracking for marketing purposes and consumer-oriented research is scarce (Boeck *et al.,* 2011). Boeck *et al.,* (2011) conducted research to evaluate how consumers perceive RFID loyalty programmes and assessed perceived intrusion as a resistance to adopt this technology; as previously consumers were concerned about privacy issues (Bhattacharya, Chu and Mullen, 2007), which could be due to a lack of understanding of how the retailers can access your location and that being and invasion of privacy. Boeck *et al.,* (2011) found that consumers were infact happy to be identified from a distance from the store and also to have their movements and behaviours tracked instore but they felt intrusion when sales staff identified them when entering the store, which stipulates that consumers are open to RFID tags that identify them at a distance and more discreetly within the store. This type of loyalty scheme using RFID technology, could enhance customer service, as retailers will be able to target consumers and offer personalised real-time communications, the area of Near-field Communications is still in the early stages of development and adoption for marketing purposes but in the future it could allow

communication to customers via their NFC-enabled smart phone. A German company called match2blue have developed Bluetooth Low Energy (BLE) beacons to help retailers attract customers' into retail stores. A new shopping precinct in Marseille, Les Terrasses du Port, have over 250 Bluloc beacaons, enabling retailers such as H&M and Zara to deliver promotional offers directly to the customers smart phones (See figure 17), if a consumer has downloaded the mobile application. The high precision beacons can sense the individual applications within a range of 100 metres and consumers can select the retailers and types of offers that they want to receive, therefore personalising the offers that they are sent.

Figure 17 – Image of promotion and Bluloc beacaon.

Images: (www.bluloc.com)

As well as technology being used as a push form of communication by retailers to market products to consumers, RFID tag can be used in the same way as a bar code, as they can provide a unique identifier for an object which can be attached to a product or label. The key difference is unlike a bar code, you can scan an RFID tag from up to 20 feet away. Burberry has integrated RFID systems in their stores since September 2012 in order to enhance their customer's shopping experience. Burberry utilise RFID technology which links to a 'magic mirror' (See section 8.2.2.3) which turn into large digital screens displaying information about how products were created, runway shows and styling information (Burberry, PLC, 2012). Wong *et al.*, (2012) further note that there is currently little research related to how this type of technology improves retail sales and how it is perceived by customers, therefore this would be an interesting area of future research.

8.1.1.3 In store Wifi

As well as communicating with customers via GPS and RFID, more fashion retailers are beginning to offer free Wifi in store that can be accessed via mobile phone. This may at first seem counterintuitive, especially for those retailers that stock other brands which may be priced cheaper elsewhere, however major retailers such as Debenhams, House of Fraser, John Lewis and Tesco are rolling out this service. There are pros and cons to offering such a service, but it is evident that increasing customers are using their mobiles to look for reviews, find out more detailed product information and compare prices in particular this trend is popular with 15–34 year olds (Verdict, 2013). Fashion retailers need to see this ability to connect with consumers as an opportunity to provide additional information via an app or a website so that customers can research and make informed decisions when in their store. For fashion retailers, there is a potential to encourage up selling and cross selling of products, by offering outfit inspiration online; some retailers already have complete the look or suggestions which encourage multiple purchases (McCormick and Livett, 2012). Having more product information via apps or on a website when customers are in store, may inspire consumer to look for additional products (Magrath and McCormick, 2013). If customers have to login in order to receive wifi, retailers will be able to capture customers' details, with the consumers consent, and provide a more precise tool to target customers. Mobiles have the ability to enhance the in store experience by allowing retailers to personalise offers whilst customers are at the retail location. The challenge for retailers is to ensure that it is easy to log in to the wifi. Location-based promotions via mobiles such as special offers or discounts may also encourage customers to spend more time in the store and it would also be a good way for fashion retailers to promote new collections or brands. The cons are of course if consumers can compare prices they may choose to buy the products from another retailer if they find it online cheaper. Verdict (2013) found that 38% of online shoppers research goods in store before completing the transaction online. This trend is known as 'showrooming', with consumers looking at products in the physical store, then going online to compare prices and purchasing it elsewhere. For retailers such as John Lewis, whose mission statement since 1925 has been founded on a price promise *"never knowingly undersold",* many would believe that the internet would be seen as a threat, as customers could compare products whilst in store. John Lewis however have embraced multichannel retailing and e-commerce and extended this strategy online which had a potential risk as it increases visibility of price differences from the high street, however sales figures significantly increased and John Lewis has won many retail awards over the past few years. By allowing customers to access free wifi in store John Lewis are able to try to influence customers to purchase by encouraging them to access product information, view ratings and reviews as well as comparing prices; reinforcing their price matching promise, making customers feel confident shopping in the knowledge that they cannot find a similar product with same price, service and quality on the high street.

8.1.1.4 Mobile applications (apps)

Retailers can develop either a native or web app that can provide product and service information, price comparison and payment modality (Bennet and Savani, 2011). Retails apps should be developed to enrich the customers' in store shopping experience, rather than being developed as an isolated channel. There are thousands of apps available that can scan barcodes, offer customer reviews and compare prices which customers can download to their mobile phones, many of which are free; these types of apps could have a major impact on many fashion retailers. Retailers therefore need to be innovative and develop apps that offer additional benefits, providing valuable information that is user-centered, encouraging purchasing intentions and increasing brand recognition. Amazon for example have an app called Amazon Flow which is an augmented reality app that can identify tens of millions of products as it can decode barcodes, QR codes and web addresses using text and image recognition. Once a photograph has been taken of the product Amazon then price matches the item, displaying the cost of items on Amazon and providing rich information such as trailers or sound bites from music albums.

8.1.1.5 QR codes

QR codes are another method that retailers can use to integrate offline and online communications using mobile phones. QR codes are similar to barcodes in that they are a machine-readable optical label that provides information about what it is attached to; whether that is a service or business, a product or an advertisement. To read a QR code, users must have a QR decoder downloaded to their mobile phone which they scan the code with, which then links to content presented on their mobile. QR codes should only be used when the information or service that they provide cannot be provided in a faster and more convenient way providing a unique service and providing consumers with a reason to scan it, such as interesting, money saving, useful information. Some fashion retailers have found more innovative ways to integrate QR codes into marketing campaigns, Vera Modo for example created a pop up shop in Aarhaus, Denmark which presented their latest collection as a photo on the wall or on a computer screen. QR codes were used to provide more details about the products and allowed the customer to order them immediately (see Figure 18)

Figure 18 – Vero Moda, Aarhaus Denmark

Source: VERO MODA

John Lewis trailed a similar initiative adding QR codes to their Christmas windows in Waitrose stores. Customers could scan the code and then purchase online and opt to click and collect in store the following day.

It is evident from reviewing academic literature and the retail examples that it is beneficial for retailers to encourage customers to use their smartphone when shopping on the high street and in the physical store, integrating m-commerce and physical retailing. As mentioned previously in section 8.1.1.4 many consumers are using mobile apps to compare prices (Verdict, 2013). Bar code scanning apps or using QR codes enable mobile product-centric services for consumers to compare prices of products offline and online and also to provide additional information about products, read customer reviews and provide social interaction B2C and C2C. Retailers need to holistically think about the different channels and marketing tools to create an omnichannel shopping experience as the boundaries between each channel are now blurred and consumers are seeking more relevant information, retailers need to provide more pertinent online material to engage, convert and encourage cross channel consumer spend.

8.2 Digital visualisation of fashion

With increasing consumer take up of online fashion shopping, as well as growth in smartphone and tablet ownership, there are a number of technological advances around digital representation of fashion items as well as the use of mobile and tablet devices in store. Although most online shopping is done on a desktop or laptop computer, the usage of tablets and smartphones is rising. Touchscreen devices differ in presentation, processing and interaction modalities from desktop computers (Kourouthanassis and Giaglis, 2012) thus allowing a different form of digital interaction with products than possible on desktop or laptop computers. Touchscreen devices allow users to directly manipulate objects on the screen so the fashion browsing experience becomes richer and more intuitive than on a desktop. New multi-touch user interfaces support additional interaction techniques beyond pointing and tapping, and allow users to interact using single- and multi-finger gestures such as flicking, swiping, rotating and pinching (Orzechowski *et al.*, 2012; Wu and Balakrishnan, 2003; Kane et al, 2008). New advances in technology for e-commerce and mobile commerce exploit the touchscreen functionality of mobile devices as a means of reducing the physical-digital divide between the store and website fashion shopping experience. Clothing has been classified as a high-involvement product category that needs to be seen, tried on and touched to be evaluated (Workman, 2010) and the lack of tactile input online presents a challenge for retailers. Presenting an object using single static images allows users to get a good understanding of the object's essence; however, since consumers acquire most information about products through vision and touch (Schifferstein and Cleiren, 2005), then the lack of touch and feel which characterises online shopping may lead to increased perception of risk. Certain characteristics of objects are difficult to convey from the physical to the digital domain, for example:

- Flow (weight, thickness, drape)
- Movement (stretchiness, comfort)
- Motion disparity (gloss, speckle)
- Personality (charm, attitude)

McCabe and Nowlis (2003) found that in the case of products with material properties, such as clothing, consumers' preferences in online environments increase when the product features are described in terms of their touch properties more than their visual properties.

The development of various forms of image interactivity technology (IIT) makes online fashion shopping more accessible and tangible to consumers (Yu et al, 2012).The theoretical underpinning for the study of IIT lies within the broader domain of atmospherics. This refers to the application of environmental psychology to marketing and can be defined as *"the conscious designing of space to create certain effects in buyers"* (Kotler, 1972, p.50). Just as the physical environment influences various psychological and behavioural shopping outcomes in a bricks and mortar store (Donovan and Rossiter, 1982; Bitner, 1992), certain atmospheric qualities of retailer websites are likely to affect the use (intentions and actual) and results (e.g. satisfaction, re-patronage, amount purchased, and dwell time) of the online store (Eroglu et al, 2001). IIT can reduce perceived product risk and increase hedonic value of the online shopping process (Kim and Forsythe, 2008). Close-up pictures, zoom facility, 2D or 3D rotation, mix-and-match function which simulates how items would look together, virtual try-on facility using personalised or non-personalised models in virtual dressing rooms, and augmented reality apps provide online shoppers with an enhanced ability to evaluate the properties of the item online in order to overcome the relative sensory impoverishment when compared to shopping in a physical store. Zoom and 3D virtual try-on reduces perceived risks and create positive attitudes toward the retailer (Lee et al, 2010). Rotation (360 degree spin) positively influences cognitive (perceived information), affective (mood), and conative (attitude and behavioural intention) outcomes (Park et al, 2008). Mix and match technology resulted in greater purchase intentions, revisit intentions, time spent on website and attitude towards website (Fiore and Jin, 2003). Personalised 3D virtual try-on positively influences utilitarian value and purchase intention (Merle et al, 2012). Interactivity increases consumers' perceived hedonic value (Yoo et al, 2010). Presence of aspects of IIT on e-tail websites therefore leads to positive consumer responses such as purchase intention, revisit intention, duration of time spent on website and overall perception of the website (Merle et al, 2012; Lee et al, 2010; Park et al, 2008; Kim and Forsythe, 2008; Kim et al, 2007; Fiore and Jin, 2003; Schlosser, 2003). Furthermore, virtual product experiences, 2-D and 3-D virtual product experiences that provide visual, tactile, functional, and/or behavioural simulations of product attributes during product inspection, helped consumers perceive less product performance risk (Park et al, 2008).

8.2.1 Digital Scrunch technology

Animation and video enables retailers to further engage with e-shoppers by providing enhanced product evaluation possibilities beyond those possible from a static 2D image. However, these tend to be difficult and costly to produce and therefore out of reach for smaller retailers or individuals with limited resources. Furthermore, videos of animations may be difficult to stop, rewind or zoom. Shoogleit.com is a digital tool developed to produce user-controlled interactive object visualisations which could digitally communicate sensation and which would be more engaging than static images, but easier and cheaper to produce than a high quality video. Furthermore, as web users become anxious when unable to actively control interactive elements (Nielsen and Pernice, 2009), user-controlled interactivity was incorporated in order to increase cognitive and affective responses (Park et al, 2008). Interactivity controlled by users allows for a synesthetic response between the subject and the media (Jacob et al, 2008). Figure 19 below shows the user digitally scrunching fabric on a touchscreen device, using the same well-known real life gestures as would be used in a physical store to evaluate and engage with the object in a more natural and authentic way than possible with a keyboard and mouse (Orzechowski et al, 2012).

Figure 19: Shoogleit multi-gesture interface on touchscreen device (Orzechowski et al, 2012)

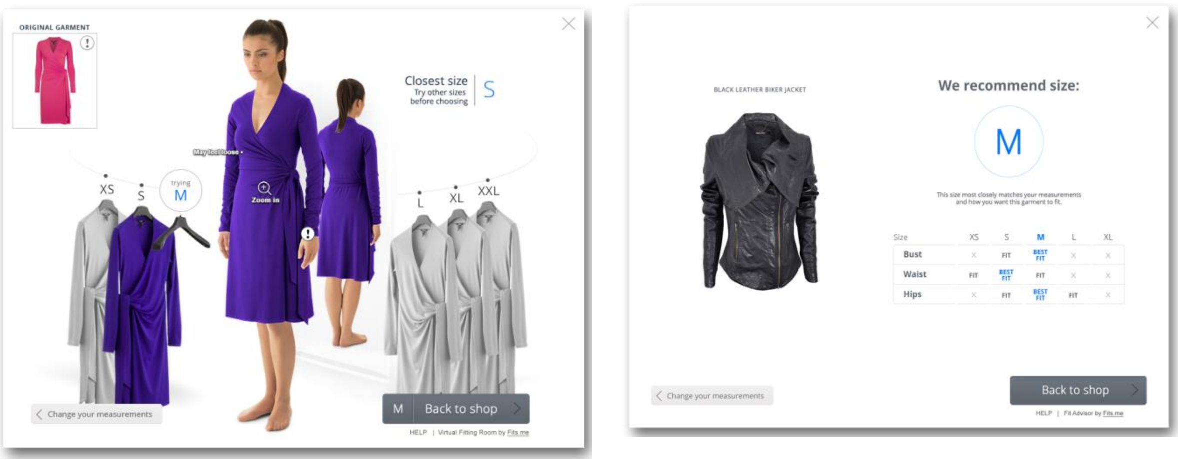
8.2.2 Virtual fitting rooms

According to Fogg (2003) ARIT produces a persuasive effect by creating experiential value through presence as well as through product simulations, media richness through environment simulations, and the narrative experience through cause and effect simulations. An increasing strength of mental imagery raises the buying intentions of consumers. The augmented reality shopping experience enables consumers to interact smoothly with virtual items online (Kim and Forsythe, 2008a,b). Thus, as is expected, ARIT has persuasive effects on increasing the buying intentions and behavior of consumers by stimulating mental imagery. Consumers' perceived risks associated with online shopping are greater than those associated with other shopping modes (Tong, 2010) due to inconsistency among fashion retailers in terms of size and fit (Mintel, 2012) therefore virtual fitting rooms have been developed that can help overcome any concerns helping shoppers choose the right size.

8.2.2.1 Online fitting rooms

There are a number of types of Virtual try-on technologies, the first being the technology that uses parametric avatars which allow consumers to provide their measurements such as height, waist, hips for women, and neck and chest for a man, and an avatar with the consumers exact measurement is produced to allow them to choose the size and fit they want. Fits.me offers a virtual fitting room for online retailers that suggests and shows the garment size that is the closest match to the shopper's measurements, and enables the shopper to 'scroll' up and down sizes until he or she identifies the size that fits them correctly or the way they prefer to wear it, see Figure 20.

Figure 20 – Fits.me online fitting room



Source: Fits.me Virtual Fitting Room www.fits.me

In a trial involving Henri Lloyd, the return rate for garments was 4.5 per cent for a group of customers who used the software, compared with 15.3 per cent for a group that did not (Nuwer, 2014). Fits.me has developed virtual fitting rooms for a number of fashion retailers including Austin Reed, Baukjen, CC Fashion, Henri Lloyd, Hugo Boss and Thomas Pink. This is one of many companies that have developed this type of online fitting room; however there is a need to research consumers perceptions of this technology in academia, as it is constantly developing.

8.2.2.2 Body Scanning Technology

Another method is 3D body scanning technology (Alvanon, 2014; Bodymetrics, 2014; Apeagyei, 2010). Studies have proven that various body shapes, even within specific size categories exist (Simmons *et al.*, 2004) therefore by using body scanning technology consumers would be able to have an accurate understanding of their body measurements, size and body categorisation. 3D body scanners can take between 160-200 body measurements in order to replicate the exact body dimensions of the customer. Companies such as Bodymetrics (2013) have developed scanners that when the body dimensions have been calculated, can provide information about the most suitable brands within a particular retail environment are for a customer, by matching garments to the consumers body shape.

Figure 21. Body scanning technology

Source: Bodymetrics www.bodymetrics.com

This information can then be downloaded onto a Bodymetrics App so that the customer can reuse the information again when they are away from the store. This type of technology blurs the boundaries of offline and online shopping and has the potential to offer a personalised shopping experience to the customer; therefore this is an area of interest for future research in fashion retail.

8.2.2.3 Virtual Mirrors

A more recent development regarding virtual fit is a multi-functional mirror, sometimes called a smart or magic mirror. Retailers such as Simply Be, White Stuff and Adidas have invested in such technologies. The interactive mirror implements the Augmented Reality concept, which is defined by Olsson *et al.,* (2013, p288) as a technique *"to combine real and computer generated digital information into the user's view of the physical world in such a way they appear as one environment"*. The magicmirror.me technology looks like an ordinary mirror on the outside, so customers can see their own reflection; however it is multifunctional and can also be used for digital signage, to play videos and catwalks for example. It can also integrate

RFID technology which can detect the garment being tried on and when a customer views themselves in the mirror, it could display product information or provide additional products related to the particular garment brought in by the customer (Melia-Segui *et al.*, 2013). Burberry stores have incorporated RFID technology to enhance their customers' experience, by weaving RFID technology into selected apparel and accessories, triggering bespoke multimedia content relevant to the products when near a magic mirror which would showcase runway footage or exclusive videos (Burberry PLC, 2012).

Customers are encouraged to interact with the mirror for example to take a photo of themselves in an outfit or to interact with virtual items online using a specially designed augmented reality application that fits the garments to the body shape, allowing customers to try on garments without having to get changed (see figure 22).

Figure 22. Magic mirror augmented reality and image capture

Source: www.magicmirror.me

Poncin and Mimoun (2014) have recently conducted some research regarding magic mirror technology with augmented reality and found that it offered strong positive benefits in terms of overall shopping satisfaction and patronage intentions. Huang and Liu (2014) had similar finding proving that augmented reality technology can increase buying intention by stimulating mental imagery. The magic mirror is blurring the lines between online retailing and physical retailing, as it enables customers to interact with garments using the mirror rather than getting changed in a fitting room (Kim and Forsythe, 2008). The benefits of this for a retailer is that customers will be able to view and try on more garments as it is not as time consuming and furthermore retailers can use it as an opportunity to up-sell offering matching accessories as in the image above (Figure. 22) from New Look in China. Customers can also take an image of themselves in the changing room and then interact with the photo in a number of ways, adding backgrounds, magazine style logos, comparing two looks and finally allowing them to share the image with their friends or social networking sites. Research suggests that this is currently more popular with the younger generation (Morris, Inkpen and Venolia, 2014), however further research needs to be conducted to see what features different consumer segments like and if more widely adopted by retailers the effect that would have on user perceptions, the use of social media and social shopping is discussed further in section 8.3.3.

8.3 Omnichannel Initiatives

The rise of multichannel retailing has led to the integration of typical web-based technologies in store as a means of engaging consumers and increasing customer service levels, commonly on large touchscreens, tablets or i-Kiosks (see section 8.3.1). As well as initiatives to encourage consumers to buy online in the physical store, there are also click and collect initiatives to encourage offline customers to enter the physical store. This is helping to overcome the most cited barrier concerning online retail which is fulfilment and returns; therefore current delivery and returns initiatives are discussed in section 8.3.2. The final omnichannel initiative to be discussed is looking at how fashion retailer are utilising social media to connect with the omni consumer. Online shopping communities are being created where consumers can share ideas and recommendations, obtain advice and review products (Leitner and Grechenig, 2008). Online consumers are increasing seeking advise and the opinions of others using social networking sites before they purchase a garment or to showcase a product after purchase in order to get assistance with decision making (Morris, Inkpen and Venolia, 2014),

8.3.1 Self-service technology

Increasing information technology interfaces are being integrated into brick and mortar stores, such as self-service checkouts (Weijters *et al.*, 2007), express order terminals and multi-media kiosks (Wang, 2012). Conversely Kallweit, Spreer, Toporowski, (2014) outline that there are two types of self-service technologies, those that are transaction focused, allowing customers to scan, pay or place an order (Cunningham *et al.*, 2008) and more recently customer service or information-related technologies (Wang, 2012). These self-service information technologies allow customers to access additional information without the help of an employee via a touch screen display kiosk and provide a more personal customised experience led by the consumer (Pantano and Viassone, 2014). Wang (2012) considered the benefits of self-service technology in store for customers finding that perceived usefulness and perceived enjoyment influence consumer satisfaction and continued behavioural intention. Moreover, perceived enjoyment is found to enhance consumer satisfaction, whereas usefulness is not, implying that when developing self-service technologies retailers need to consider entertaining elements to satisfy the consumer (Wang, 2012). In Kallweit *et al.*, (2014) study, they did not find hedonic aspects of self-service information technology relevant to consumer usage; it could be argued that was due to the product category that was used for the research, which was drilling machines. Fashion retailers have embraced digital kiosks and touch screens not only for utilitarian purposes but also hedonic to create an experiential retail experience in store such as smart mirrors discussed earlier.

Other research regarding consumer perception of using and overall satisfaction with regards to self-service technology include convenience, trust, speed of transaction and perceived waiting time (Makarem *et al.*, 2009; Collier and Sherrel, 2010; Ding *et al.*, 2010). Fashion retailers have adopted both types of self-service technologies for example John Lewis has rolled out customer self-service kiosks across all of their brick and mortar stores, and in addition to that their employees know as partners, have all been trained to aid the customers journey via a kiosk if required, known as PACT- Partner Assisted Customer Transactions. The idea behind this is that the partners close the sale when on the shop floor rather than customers leaving the store and looking elsewhere. Research by Di Pietro *et al*, (2014) evaluated how employees perceived self-service technologies as they could be perceived as a threat, as the customer can lead the transaction, effectively serving themselves, therefore substituting humans, however many employees considered it as a tool that could enhance their job rather than replace it. Marks and Spencer offer a similar service equipping their staff with iPads, in order to allow them to walk around the store and take product orders for home delivery or delivery to the store. Further Marks and Spencer have implemented more self-service information-related technologies such as the virtual makeup counter, which uses facial recognition technology to enable customers to upload a photo and experiment with the latest beauty trends, this new digital technology has attracted more than 200,000 visitors to date (Internet Retailing, 2013). The design of the Marks and Spencer in store kiosks replicates the iphone/ iPod shape as they wanted it to look inviting and user friendly (see Figure 23). The kiosks are not only there to allow people to order online, and arrange products to be delivered to their desired location, but to provide inspiration through the Style Edit which provides advice through editorial features and videos.

Figure 23 – Marks and Spencers iKiosks

Source: Polytouch kiosk by Pyramid Computer GmbH

In Kallweit *et al.*, (2014) study they found that content quality of self-service information technology was perceived more important than perceived ease of use and attitude towards usage. They found that customers wanted information that was relevant to the products that they required rather than a large variety of information; therefore they advised that kiosks are designed to target specific audiences, with easy to apply filters to help narrow the search process. The kiosks allow retailers to offer an extended range of products, reduce queuing times, and also to provide inspiration and choice to their customers, also such IT systems can cut costs and raise productivity as the customer is essentially providing the service to themselves

(Weijters, *et al.,* 2007). There are additional benefits to such a system as it can allow the retailer to capture consumer details, provide confidence to customers that may not have previously purchased online showcasing the retailer's website and also providing in store entertainment and style advice to customers in the store (Pantano, 2014). In an interview with Internet Retailing, Laura Wade-Gery, Executive Director, Multi-channel E-Commerce at Marks and Spencer said *"Multichannel customers spend more, and as M&S adds channels, that spend continues to rise"* (Internet retailing, 2013) similarly in sales figures published by John Lewis Partnerships, 7th September 2013 *"21 per cent growth in PACT transactions underlines the importance to our customers of omnichannel shopping options"* stating the importance of kiosks in store.

8.3.2 Click and Collect and deliveries.

The main barriers to consumers' adoption of online retailing are to do with the fulfillment and delivery of products. Over the past 5-10 years different online and multichannel initiates have been developed in order to try to offer consumers, better delivery and returns options. Click and Collect is an initiative that has been adopted by many multichannel retailers including House of Fraser, Marks and Spencer, Debenhams and John Lewis. John Lewis launched click and collect in 2009, allowing customers to order online or by phone by 7pm in order to collect their order the next day from a chosen John Lewis store. In 2011 Click and Collect accounted for 22% of all online orders, indicating that a lot of customers value this service. There are multiple reasons for this initiates success; convenience, immediate returns, quicker process and no delivery costs. Cost of delivery, inconvenience of and cost of returns and convenience of delivery times are cited as the largest barriers to purchasing online according to Hsiao (2009). Obviously with a textile product there is a higher risk of the product being incorrect due to fit issues, therefore initiatives to make delivery more convenient to the consumer are imperative. Another initiate that is currently being adopted in the UK are delivery lockers such as My Hermes and Amazon Lockers, these are designed to expand delivery options offering products to be placed in lockers at a convenient location for the customer, often in car parks or at train stations for example. Collect + is a returns intuitive where by retailers are associated to local business and collect returns from customers, which are then collected and distributed back to the retailers. This is a free service to customers and as 87.1% of people stated that free delivery and returns are important when online shopping it is likely this will grow in popularity. Shutl is a UK based technology start-up that enables the delivery of goods purchased online either within minutes of them being purchased or inside a one hour window selected by the consumer. This is achieved by its web platform that connects retailers to local same-day courier companies. These are currently the main initiatives in the UK concerning delivery and returns which have advantages for both the retailers and consumers, reducing costs and saving time for both.

8.3.3 Social media

The traditional fashion media landscape has undergone an immense transformation with the advent of social media, which enables marketers to move from a one-way communication model to a two-way dialogue which promotes interaction with consumers. The rise of the social web represents a paradigm shift in marketing communications (Christodoulides *et al.,* 2012). The exponential growth in consumer adoption of online social networking and technological advances in functionality on social media platforms present tremendous opportunities for fashion retailers to get closer to customers. Social media are increasingly used as a tool for disseminating marketing messages and building deeper relationships with current or potential customers. Figure 24. below shows the traditional one-way mass communications model, in which the brand's message is broadcast to a mass market audience, with no opportunity for feedback or dialogue.

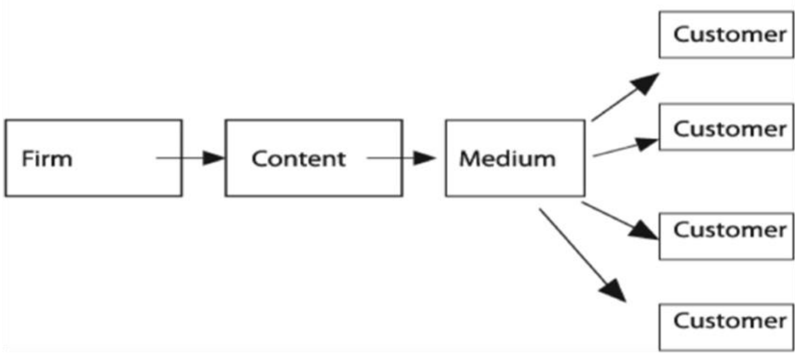


Figure 24: Traditional marketing communications model

Figure 25 below shows the current Web 2.0 era communications model, where channels of communication permit feedback and dialogue between the consumer and the brand, as well as between consumers themselves, for example through virtual user communities or fashion blogs.

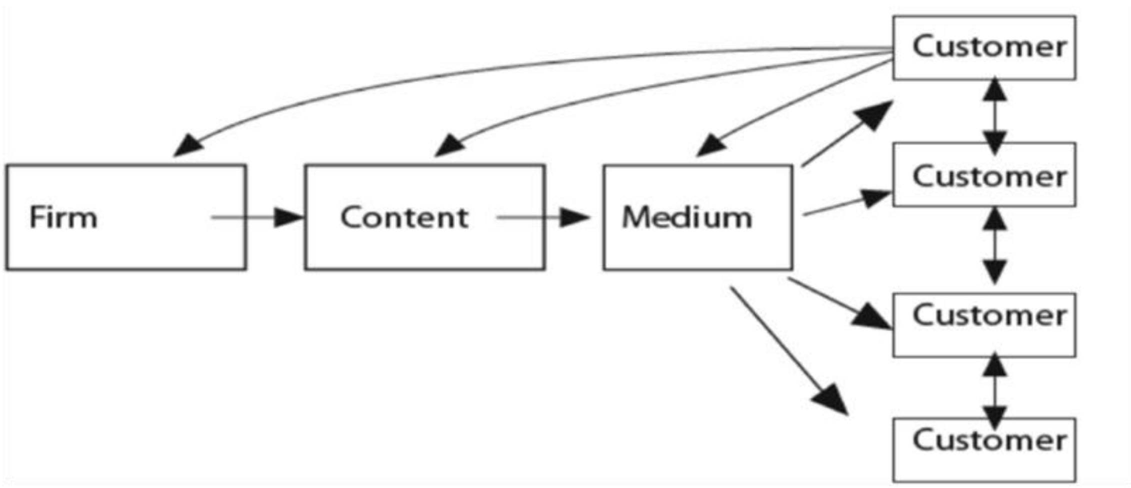


Figure 25: Web 2.0 marketing communications model

Social media refers to online content created by people using highly accessible and scalable publishing technologies, resulting in a *"diversity of new sources of online information that are created, initiated, circulated and used by consumers intent on educating each other about products, brands, services, personalities, and issues"* (Blackshaw and Nazzaro, 2004, p. 2). Social media represents a wealth of information, opinions and influence of those experienced with a product, which are readily available and widely accessible online 24/7. A fundamental element of Web 2.0 is user-generated content (UGC), so that besides extracting value, users also add value to applications and processes by generating, reviewing, editing and disseminating content (Constantinides *et al.*, 2009). Although consumers initially used social media to connect with personal connections rather than businesses, recent evidence points to an increasing trend for engaging with brands on social media, with the average consumer now linked to 29 brands on premier social networking site Facebook (NBC Universal Integrated Media, 2013). Additionally, the growth in penetration of smartphones and the use of mobiles rather than desktop computers to access the internet *'has placed retailers, symbolically perhaps, in the palms of consumers' hands, removing many former borders and expanding the contexts and times that engagement can happen*' (Spooner, 2012). Direct customer involvement and UGC lead to powerful network effects and the creation of user communities (O'Reilly, 2005). Fashion retailers have amassed some of the largest user communities on a number of social media to continuously communicate and deliver branded content to their core brand advocates. Table 10. below shows the top retailers on social network Facebook in terms of fan base, the vast majority of which are fashion retailers.

Table 10: Top fashion retailers by Facebook fans, 2013 (Source: ChannelAdvisor)

ChannelAdvisor Facebook Commerce Index Q2 2013 - Top 25							
Beginning of Q2 Rank	End of Q2 Rank	Retailer	April	May	June	Q2 Growth #	Q2 Growth %
1	1	Walmart	28,810,602	29,654,823	30,651,946	1,841,344	6.4%
2	2	Victoria's Secret	22,236,376	22,439,565	22,592,540	356,164	1.6%
3	3	Target	21,850,170	21,897,756	21,919,152	68,982	0.3%
4	4	adidas Originals	20,197,584	20,407,248	20,809,037	611,453	3.0%
5	5	Amazon.com	18,134,230	18,646,376	19,232,798	1,098,568	6.1%
6	6	Levi's	17,913,553	18,233,537	18,636,904	723,351	4.0%
7	7	Burberry	15,119,233	15,188,812	15,430,939	311,706	2.1%
9	8	Nike	12,763,746	13,937,556	14,200,510	1,436,764	11.3%
8	9	Victoria's Secret Pink	13,011,356	13,111,276	13,283,243	271,887	2.1%
10	10	WWE	11,986,858	12,141,523	12,257,418	270,560	2.3%
12	11	Macy's	11,160,648	11,380,271	11,612,098	451,450	4.0%
11	12	Lacoste	11,361,961	11,497,772	11,548,456	186,495	1.6%
15	13	Gucci	10,696,831	10,861,409	11,028,475	331,644	3.1%
15	14	Hollister Co.	10,344,390	10,391,016	10,472,868	128,478	1.2%
14	15	Kohl's	10,375,574	10,430,616	10,464,894	89,320	0.9%
16	16	Apple Inc.	9,016,750	9,132,869	9,278,863	262,113	2.9%
18	17	American Eagle Outfitters	8,717,915	8,819,189	8,907,734	189,819	2.2%
17	18	Aéropostale	8,820,653	8,853,839	8,882,624	61,971	0.7%
19	19	Forever 21	8,123,753	8,214,836	8,290,933	167,180	2.1%
20	20	Abercrombie & Fitch	7,577,423	7,601,879	7,641,291	63,868	0.8%
20	21	Old Navy	7,307,863	7,497,551	7,621,313	313,450	4.3%
21	22	NFL	7,240,102	7,299,047	7,523,304	283,202	3.9%
25	23	Dolce & Gabbana	6,790,491	6,902,735	7,053,975	263,484	3.9%
23	24	Ralph Lauren	6,771,478	6,821,057	6,864,982	93,504	1.4%
24	25	Best Buy	6,744,436	6,742,432	6,740,293	-4,143	-0.1%

Source: ChannelAdvisor

Social media channels facilitate immediate, interactive and low-cost communications (Miller *et al.*, 2009) and offer the opportunity for viral marketing, many-to-many conversations, and real-time dialogue with consumers. Firm-generated content on social media aims to create positive word of mouth (WOM) for the brand (Chu and Kim 2011) and strengthen relationships with consumers. Kaplan and Haenlein (2010, p.67) highlight the key benefits of social media that *'allow firms to engage in timely and direct end-consumer contact at relatively low cost and higher levels of efficiency* *than can be achieved with more traditional communication tools'*. As such, social media supports the democratisation of fashion retail and levels the playing field in fashion marketing communications, as its low cost nature means it can equally be used by small independent fashion retailers as by large multinational fashion brands (Barnes, 2014).

Brands may also derive value from social media by real-time feedback on existing products or potential new launches (Constantinides *et al.*, 2009). For example, online private sales site BrandAlley used the opinions of its 8 million member community to inform the selection of an emerging designer's launch collection (Owen, 2011). Members could vote on one of three possible selections and the one with the most votes would be put into production. Similarly, online retailer ModCloth's 'Be the Buyer' programme allows users to vote items from emerging designers into production. Thus, consumers effectively co-create the product and by gleaning customer feedback on product samples, the retailer may reduce some of the risk inherent in predicting consumer preferences before committing to a production order (Fiore, 2008). This illustrates how brand community members play an active part in the brand's life cycle (Muniz and O'Guinn, 2001).

However, the characteristics of social media also bring potential risks for fashion retailers. Web 2.0 has led to a shift in locus of value production from the firm to the consumer, and a shift in the locus of power away from the firm to the consumer (Berthon et al, 2012). Literature suggests that it is the consumer, rather than the companies, that now controls how brands are created, developed, rejected and destroyed (Fournier and Avery, 2011; Christodoulides *et al.*, 2012). The shift in power and authority enabled by the UGC element of social media gives a voice to huge and diverse consumer groups, many of whom had no status of authority or persuasion under the established hierarchical fashion system with its *"high barriers to entry and exclusionary practices"* (Crewe, 2013, p.770). Evidence of this power shift can be seen within the activities of online brand communities where members have a *'transformative role towards business practices'* Cova *et al.*, (2007, p. 21), either as critics, provocateurs or agents of positive change. No longer are consumers' complaints confined to the relative privacy of the store environment, but instead may be played out in the public glare of the social media landscape. Therefore, successful community engagement on social media *'requires mastery of the nuanced principles, styles, and mechanism governing the new cultural environment'* (Fournier and Avery, 2011, p. 195).

Brand communities that act against the interests of a brand represent a force of destruction. For example, in 2010, GAP ditched their new logo after only one week following a virulent social media backlash. Although the new logo was a more contemporary, modern expression designed to reflect the current direction of the company, the overwhelmingly negative reaction suggests that brand custodianship in the age of social media no longer rests solely with the retailer. With the shift to co-creation of value and a renewed focus on relationships (Vargo and Lusch, 2004), the concept of customer as co-producer of meaning removes some of the control from the brand and the brand identity is thus co-constructed by consumers and marketers. The GAP case demonstrates the risks and complexity associated with successful brand community engagement and growth.

Luxury fashion brands have traditionally shied away from involvement in social media in order to preserve their exclusivity, and because the characteristics of Web 2.0 technology did not fit with the firms' desire for strong control of their brands (Kim and Ko, 2010). However, in more recent times, many luxury fashion brands have invested in social media marketing in order to build and strengthen relationships with their consumers and create purchase intentions for the longer term (Kim and Ko, 2010). Kim and Ko (2010) note that many designer houses are active on social media in a number of ways: for example, Louis Vuitton's live broadcasting of catwalk shows on Facebook, or Ralph Lauren, Chanel, Donna Karen, and Gucci's development of mobile apps. The UK luxury brand Burberry is equally known for its digital prowess as it is for its trenchcoats, thanks to social media innovations such as live-streaming of catwalk shows on Facebook and the creation of its own social media community called The Art of the Trench. For luxury retailers, although the social media fan base is not always representative of the brand's actual customer base, the brand can use the medium of social media to build a relationship with aspirational consumers of the future.

In addition to marketing communications and customer relationship management, another use of social media which may prove to be more valuable in the long-term is its potential for listening to the voice of the customer. Social media channels provide cheap and easy access to a wealth of quantitative and qualitative consumer data that retailers can use to aid decision-making. UGC on social media is becoming a rapidly growing source of brand conversations and consumer insights (Christodoulides *et al.*, 2012). Data mining of this mass wealth of data on consumer behaviour, consumer perceptions of retailers and their marketing activities, could help to inform the retailer's future marketing strategy. Advances in technology provide retailers with sophisticated means of monitoring UGC on different social media platforms to gather useful information to guide future brand strategies.

A key issue for marketers is the quantification of return on investment generated by investment in social media marketing (Hoffman and Fodor, 2010). Traditional success measures such as direct sales, conversions, cost reductions or market share are difficult to apply to social media marketing, and it is commonly advised that long-term returns should be prioritised over short-term payoffs (Hoffman and Fodor, 2010). Although social media marketing is still an emerging discipline, Divol *et al.*, (2012) point out that it is becoming increasingly acceptable in the marcomms mix as the *'perceived lack of metrics, the fear, and the limited sense of what's possible are eroding'*. Next will be a brief introduction to the main social media platforms that are utilised by fashion retailers.

Facebook was founded in 2004 and has evolved into the world's largest social network with over one billion active users in 2014. It is therefore a key social media channel for fashion retailers. Facebook's continual technological innovation has led to better functionality for business users and fashion retailers have recently set up shops, competitions and virtual fitting rooms within their fan pages, as well as live-broadcasting catwalk shows. Supermarket retailer Tesco used augmented reality technology to build a virtual fitting room on its Facebook page, while British luxury brand Burberry chose to launch its new Body fragrance on Facebook in 2011, by sending a sample to all those 'liked' its fan page. In 2009, Louis Vuitton became the first fashion brand to post a live catwalk show on Facebook. More recently, ASOS previewed their summer sale through a Facebook application to drum up interest and excitement amongst consumers. The application allowed its Facebook fans to play a series of games and players with the most points went to the front of the virtual queue and could access the sale first. When fans interact with a brand on Facebook, for instance by ‘liking’ or commenting on a post, that interaction is automatically posted to the fan’s news feed, for all their friends to see. This increases the viral effect of the brand’s social media activity, which could be seen by a potentially unlimited number of people. Facebook also provides access to a greater amount of consumer demographics than either Twitter or Google Analytics, and thus enables retailers to more precisely target their marketing communications and advertisements. For example, a fashion retailer could choose to target an advert to females of a given age range in a particular geographic area who also have also ‘liked’ a given competitor brand. Retailers can also access qualitative data in the form of posts and comments about their brand, which can be used as a general indicator of brand feeling at any given time. Facebook launched social plug-ins in 2010, which allow a user to log into numerous other websites using their Facebook log-in details. The advantage of this for retailer websites is that a user that logs in with their Facebook details automatically shares their Facebook demographics, which provides a valuable source of consumer data for the retailer.

Twitter is the world’s largest micro-blogging platform and enables consumers to keep up to date with the latest news and gossip from their favourite fashion retailers. Its limit on 140 characters per tweet makes it more concise than a blog post, while hashtags (#) provide a searchable means of grouping topic threads. The retweet function allows users to share another user’s tweet with their own network, thus increasing the potential for viral marketing. Its speed and conciseness make it a real-time information network and also allows the gathering of real-time consumer intelligence and sentiments. However, these characteristics also represent a challenge for retailers, as Twitter is increasingly being used as a public forum for consumer complaints and consumers are demanding swift responses to Twitter complaints. Some fashion retailers have set up separate customer care accounts on Twitter which promise 24/7 support, such as Nike (@NikeSupport), All Saints (@AskAllSaints) and Boohoo (@boohoo_cshelp).

Instagram is a photo-sharing app founded in 2010 which boasts the fastest adoption rate of all social media and a higher level of engagement than Facebook (L2 Thinktank, 2014). With its highly visual focus, it is very well suited to fashion retail (Arthur, 2014). Retailers and brands can edit photos online by using Instagram’s filters and then share product photos, blogger or street-style shots, celebrity endorsements or exclusive behind-the-scenes content to drive interest and engagement in their followers. Hashtags (#) are used for searchable grouping of content and to facilitate sharing content to other platforms such as Twitter and Facebook.

Pinterest is an image-based online social pinboard, and one of the fastest growing social media platforms. Since its user base is predominantly higher earning females aged 25-44 (L2 Thinktank, 2013; Radice, 2013), it is a particularly attractive platform for fashion retailers. It also drives high levels of traffic to retailer websites and boasts higher conversion rates than either Facebook or Twitter. In 2013, US fashion retailers Badgley Mischka and Bergdorf Goodman previewed their resort collections exclusively on Pinterest. The visual nature of Pinterest makes it a perfect destination for shopping inspiration and product discovery. Users may create themed pinboards using their own images or images collected from the internet. For example, fashion retailer Urban Outfitters has a number of product-themed boards including interiors, accessories, shoes and gifts, as well as behind-the-scenes, blogger street-style and festival fashion inspiration.

YouTube is a video-sharing platform with over 1 million unique users per month. It is also the world's second largest search engine after Google. Fashion retailers can set up their own YouTube channel to broadcast fashion shows, fashion films, advertisements and behind the scenes content. The YouTube widget allows users to embed YouTube videos on their blog. With dwindling audience figures for television advertising, and the increasing fragmentation of television channels, YouTube represents an effective means of reaching target demographic groups and sharing video content. This explains why YouTube is such a popular social media platform for the fashion retailers, with 90% of fashion brands currently maintaining a YouTube channel and investing in digital video to drive engagement and Traffic, according to L2Thinktank (2012). Although it is not possible to click through to a retailer's website from a YouTube video, it is possible to create shoppable videos. For example, eBay created shoppable videos to celebrate London Fashion Week in September 2013. Luxury retailers such as Chanel and Louis Vuitton use YouTube to tell the history and story behind the brand, with very subtle product showcasing. High street retailer French Connection 's YouTube channel broadcasts the latest fashion trends and tips, TV commercials and provides links to its website and other social media platforms.

Google+ is the world's second largest social network site after Facebook. It is a visually communicative platform and highly optimised for photo and video content. Although it remains an emerging platform for fashion retailers, its value lies in its integration with Google's search engine and the potential for increased SEO, since postings are indexed in Google's search engine. Early adopters of Google+ when it launched 2011 were predominantly male, which made this platform arguably of less interest for fashion retailers than Pinterest, for example. However, increasing numbers of fashion retailers are establishing a presence on this platform such as H&M, Burberry and ASOS. Circles enable users to organise contacts into groups for sharing content, while Hangouts are used to facilitate video chat sessions, with a maximum of 10 people, but which can be simultaneously live-streamed with the public, even if they aren't involved with the Hangout. For example, Marc Jacobs incorporated Hangouts On Air into the live-stream of its New York Fashion Week show in February 2013, during which fans and influencers shared their first reactions. The use of hashtags (#) enables users to search for related content and broaden their chance to discover new brands.

In practice, fashion retailers coordinate activity across a number of social media channels, with content strategy adapted to suit the particular nuances of each platform's functionality and audience. Table 11 below shows an integrated social media strategy for premium fashion retailer Michael Kors across a number of key platforms (So, 2014).

Table 11: Michael Kors' social media matrix (adapted from So, 2014)

Platform	Number of fans/followers	Content type
Facebook	13 million+	Product visuals and campaign images, branded street style shots, videos, fashion week coverage, brand events, behind-the-scenes insights, charity fundraisers and contests
Twitter	1.97 million+	Product and behind-the-scenes features, brand news, some relevant external content and brand ambassador mentions. Promoted tweets of seasonal campaigns and videos
Pinterest	137,000+	Original product and campaign images, mood and colour inspiration and reposted lifestyle images on themed and consistent boards
Instagram	2.1 million+	Product images, full looks, collaborator images, consistent hashtags, videos including campaigns and catwalk, street style, behind-the-scenes
YouTube	11,200+	Runway, destination videos, MK commentary and interviews, seasonal campaigns, special events, travel, behind-the-scenes and collaborations
Google+	506,000+	Runway videos, Kors Collaborator photoshoots and videos, consistent hashtags, product images, runway images, Destination videos, behind-the-scenes shots
Vine	51,600+	Animated product features, campaign-related videos and runway coverage
Blog	n/a	The Destination Kors blog comes in three languages: English, Chinese and Japanese. Acts as the source for a lot of other social media content, featuring news, editorial, celebrity style coverage, apparel and beauty campaigns, travel diary, mood videos and images, runway videos and the #WatchHungerStop charity page

Shopping and social networking activities are merging and new research is being conduced with regards to online social shopping (Wang, 2009; Ju-Young, Kang, Johnson and Wu, 2014).

9. Conclusion

There are a number of different facets of retailing strategy that have contributed to the globalisation of the fashion retail market; new innovative retail formats for example mobile applications and kiosks, new marketing methods particularly social media, and the progression of omnichannel retailing to provide a consistent retail experience across multiple channels. New technologies are being used to improve the fashion retail process, from product development, through the supply chain to the delivery to the customer. The future of retail will mean that channels will be viewed not as individual silos but how they work holistically together; stores for example will use technology to offer virtual shopping benefits in a physical environment and online websites or mobile app will encourage consumers into the store (Molenaar, 2010).

Hence convergence of channels is simply not the melding of technologies but it is about the new and unique opportunities that arise as a result of these combinations (Wind and Mahajan, 2002). A key challenge is now looking at how new technologies will be combined seamlessly and how consumers interact with these mediums (Wind and Mahajan, 2002). With the emergence of omnichannel retailing, and given the attractiveness of this strategy for both the retailer and the consumer, there are many research opportunities for example:

- development and implementation of omnichannel retail strategies;
- understanding the omnichannel consumer and the customer journey;
- understanding of ICT communications to improve retail strategies;
- development of a deeper understanding of omnichannel initiatives to improve the customer experience.

Channel convergence is more greatly aligned to omnichannel retailing. This is because the theme encapsulates a highly advanced seamless customer experience across channels as aforementioned by Wind and Mahajan, (2002). Omnichannel is also more open to the addition of new technologies as they will form part of a single customer experience, rather channels being managed in isolation or being individually defined. For example multichannel affords no scope to examine the simultaneous use of mobile technology in a store for example as these are considered as two parallel channels rather viewed than a single customer journey. This is supported by Deloitte (2012) who report that channels and their distinctions are becoming increasingly blurred between both the physical and virtual space.

Through in store digital technology, retailers are able to bring the social and entertainment benefits and limitless shopping options of the web into the store, whether on retailer's own screen or on consumer devices (Drapers, 2011). The benefit of smartphones and tablet devices is their facilitation of greater interactivity between consumers and websites, due to their touchscreen technology and multi-modal (vision, touch, sound, vibration) capabilities. Retailers provide the customer with the ability to choose from the entire product range via in store kiosks or mobile apps, even if there is a lack of space to range it in store. Such technology permits the online and store environments to reinforce each other in innovative ways. For example, UK department store retailer House of Fraser trialed small format click-and-collect stores in Aberdeen and Liverpool, which do not stock inventory but provide consumers with the ability to browse and order from the retailer's entire product range on its website in sophisticated surroundings with a high level of customer service (Drapers, 2012). This development questions the function of a physical store as a place to stock inventory; however it is dependent on high level of digital prowess to be successful.

This paper has reviewed research outputs and academic and industry publications that have considered the subject of fashion retailing in the past, present and future. It has provided an overview of the growth and development and key drivers of change of the fashion retail industry, emphasising the adoption of online retail being the driving force. The development of ICT technology has also developed the modern fashion industry, which have enabled communication to take place across the globe instantaneously enabling buyers to communicate with overseas suppliers, retailers to manage inventory and fulfilment, and information technology relevant to consumer usage to improve in store experience.

The latter part of the paper focuses on multichannel and in future likely omnichannel consumer, identifying some of the current research themes about cross channel consumer behaviour, finally summarising some current retail initiatives across the different channels. As consumers have access to multiple distribution channel such as brick and mortar retail, e-commerce, mobile commerce, and more recently social media commerce, there is a lot of academic literature regarding the adoption and use and what factors influence purchase decisions (Kacen, Hess and Chiang, 2013; Hsiao, 2009; Yang, Lu and Chau, 2013; Toufaily, Souiden and Ladhari, 2013). However the final point to consider concerning omnichannel retailing is that whilst it is seamless and integrated it is also a ubiquitous experience as channels can be accessed anywhere and at any time, using a variety of devices; future research should not only consider the distribution channels, but analyse when consumer interactions are taking place.

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