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Exploring the blurring of fashion retail and wholesale brands from industry perspectives

Abstract

Purpose – This exploratory study challenges the fashion retailer/wholesale brand debate considering established definitions, structures and propositions of these brand typologies, developing new perspectives with particular emphasis on the blurring of the product range, retail fascia concepts and supply chain management. The paper argues that the fashion industry has evolved significantly since the theoretical definitions were established in the early 2000s. The paper presents the results of a series of in-depth interviews conducted with key informants from large-scale fashion retailers, manufacturers, textile researchers and funding organisations in the UK. The paper highlights the blurring of retail and wholesale brands occurring to gain direct access to the market or enter new markets and subsequently, from a manufacturing perspective, attain competitive advantage and operate vertical integration to satisfy customer demand.

Keywords Retail technology, retail brands, wholesale brands, the fashion industry, supply chain management

Paper type Research paper

Introduction

This paper explores the manner in which the structure of retail and wholesale brands have evolved and blurred in the global fashion industry over the past few decades. The importance of the retailer own-label brand versus the wholesale brand has garnered much attention in the literature in the late 1990s and early 2000s (e.g. Ailawadi and Keller, 2004; Burt and Davies, 2010; Davies, 1992). During this period, retailer own-label brands, particularly those in the fashion sector, became increasingly competitive and were desirable alternatives to wholesale branded propositions. The early literature focused on the definitions and differentiations between the two types of brand, and these perspectives have become well established in retail marketing fields. However, this study challenges the existing definition of retail and wholesale brands. For example, early discussions around the terminology ‘retail brand’ were often based on the product features, encompassing quality composition, price position, packaging and naming. These features were deemed as a particularly important issue because, initially, definitions and categorizations of retail brands were often framed around ‘generic’ and ‘paying lowest price for products’ (Liu *et al.*, 2018) being associated with own brand labels. In contrast, the wholesale brand were regarded as premium branded products with strong brand names and quality (Liu *et al.*, 2018). Recently, product focused studies (e.g. Kremer and Viot, 2012; Liu *et al.*, 2018; Mitchell *et al.*, 2012) have perpetuated the notion of retail versus wholesale brands. However, this study argues that retail and wholesale brands cannot be differentiated.

This research aims to offer fresh perspectives on how retail and wholesale brands have blurred over the years in light of the development of technology and online marketing, with the desire to achieve global and national recognition, as well as control over profits, services and manufacturing facilities. Furthermore, the findings of the research explain how the development of technology is challenging the convention of distribution channels, and finally how retail brands are becoming manufacturers and wholesale brands in parallel. The article contributes new perspectives on the concepts of retail and wholesale brands, providing contemporary perspectives of key definitions and clarification of industry structures. The findings are limited to the fashion retail sector but has implications beyond fashion to other product categories where retailer and wholesale brands are common.

Literature Review

Retail and Wholesale Branding

One theme in many of the studies on retail branding is the common definition of ‘retail brand’ (e.g. Ailawadi and Keller, 2004; McColl and Moore, 2011) describing the strategy as the concept of selling a product and process under the retail brand’s own name or a separate brand name that is owned, controlled and marketed by the retail company. In the literature of retail marking, retail brand products basically serve to provide tangible attributes, which are often produced by a third-party manufacturer, but are solely designed and named, as well as exclusively sold by the owned retail store in question (Kremer and Viot, 2012). McCormick *et al.* (2014) has noted that this strategy

allows retailers to create a unique position in the marketplace by developing a range of product categories that are identical or similar to the retail store name and design. This is because retail brand products are recognised by their brand name, which reflects the qualities, values and personalities associated with the retail store (image) (Kremer and Viot, 2012). Furthermore, the literature on retail brand development encapsulates many other factors, encompassing the retail brand production, the labelling, and the service (process) such as customer service, fitting rooms, return policy, and store atmosphere (Anselmsson *et al.*, 2017).

On the other hand, wholesale brands, by definition have been described as branded products owned and created with a unique label by manufacturing organisations or suppliers that are sold at wholesale prices for distribution to various third-party retailers, e.g. variety stores and department stores (Chimhundu *et al.*, 2010; Martenson, 2007). In the existing literature, wholesale brands are also referred to as lifestyle brands or manufacturer brands, whilst others are referred to as premium brands or designer brands (Liu *et al.*, 2018), with a strong brand name and emotive values (e.g. Kate Spade and Helly Hansen), but may never have been involved in the manufacturing facilities. For the sake of consistency and clarity, this paper will use the term ‘wholesale brand’ to encompass all of these categories.

It is firmly established in the retail marketing literature that traditionally, wholesale brands used intermediaries (Fahy and Jobber, 2015), as their route to market. However, digital alternatives now offer direct channels to market and offers wholesale brands a new distribution medium, and is deemed as a useful method to maximise profit margins for the wholesale brand, and so it could be argued that there has been disruption to this established model of retail channels to market. In part, the use of intermediaries was deemed important for wholesale brands, as traditionally their expertise involved ownership over the manufacturing facilities (Dicken, 2015), and producing branded products mostly in their home countries (Rashid *et al.*, 2016) e.g. Burberry and Barbour, with the strong brand name and message that entails an-established image in the market for promising quality and innovative product design (Rashid and Barnes, 2018). Furthermore, Molla-Descals *et al.* (2012) also highlighted how, traditionally, wholesale brands would decide to expand abroad in order to sustain growth and to increase profit. However, today, operating internationally is increasingly common in the fashion industry, as an option for international growth and to cope with increased level of domestic competition and commercial saturation (Molla-Descals *et al.*, 2012).

An important gap emerging from the literature on retail and wholesale brands is the growth of international retailing and technology, resulting in an ambiguity between retail and wholesale brands. The next section, comprising the literature review, focuses on the different entry methods and channels used by the global fashion industry. This is followed by a literature review of the fashion supply chain.

The Emergence of International Retailing and Its Impact on the Blurring Definition

The international retailing literature has been dominated by themes related to the scale and extent of retailer expansion, the direction of international expansion (Gomes *et al.*, 2018; Moore *et al.*, 2010), international dimensions and a domestic business setting relevant to the nature of power, satisfaction and/or conflicts (Chen, 2016). Concomitant developments of entry methods e.g. licensing or franchising, joint venture and setting up a wholly owned subsidiary are deemed to be lower cost as opposed to an acquisition or stand-alone store or flagship (e.g. Moore *et al.*, 2010, Hollender *et al.*, 2016). However, these low cost entry methods provide fashion retailers and brands with less control over product merchandise and marketing of the product (Doherty and Alexander, 2006). Consequently, fashion retailers are always seeking new methods to reduce cost yet expose and expand their brands internationally. However, blurring differences between retail and wholesale brands with particular reference to international fashion retailing remains at an incipient stage.

Furthermore, the competition in the fashion market has become even more intense with the emergence of own brand labels (e.g. Jack Wills and River Island) and international retailers e.g. ZARA, H&M as well as the growth of online retailing, almost all of whom are involved in using a 'multi-channel strategy' apart from pure play retailers e.g. ASOS, Net-a-Porter and Zalando (Ashman and Vazquez, 2012). The increasing growth of competition and price pressure has also pushing the majority of wholesale brands and channel members to change their business approach by introducing a more retail-oriented strategy.

Fast Fashion and Consumer Demands Impact on the Supply Chain

Another important theme in the existing fashion literature closely relates to how the evolution of the European fashion industry was influenced by a flexible, quick response approach with high volatility and low predictability (Barnes and Lea-Greenwood, 2006) as well as price pressure and increasing competition from international sourcing (Rashid *et al.*, 2016). According to Bhardwaj and Fairhurst (2010), the pressure on the supply chain was influenced by consumers' lifestyles and the consequent demand for newness. More recently, Perry and Wood (2019) have denoted that the increasingly affordable style appearing on the high street in the 1990s was led by the so-called 'fast fashion' retailers such as Zara and H&M and marked a departure from an era where well-made, stylish clothes were largely the preserve of affluent consumers.

In the existing literature of fashion retailing and supply chains, Zara is particularly credited for being a leader of fast fashion (e.g. Bhardwaj and Fairhurst, 2010) because of its rapid stock turn-around, vertical integration, and stores that act not only as a point of sale for own brand labels but also influence the design and speed of production. According to Guan and Rehme (2012), vertical integration is described as the process whereby companies such as Zara own nearly the entire supply chain, from design and production to distribution and logistics and to stores worldwide. However, Bruce and Daley (2006) have previously denoted that fast fashion is not always applied to the whole range in the store, but that it accounts for only 20% of the product range, whereas the 80% is outsourced to lower labour cost countries (Perry and Wood, 2019). For

example, Spanish fast-fashion retailer Zara outsourced and used global production by expanding their supplier base to lower labour cost countries, e.g. Morocco, Turkey and India, finding that suppliers could respond quickly and to the standard required. Today, even wholesale brands are involved in outsourcing and global production (e.g. Rashid and Barnes, 2018) due to the lower labour cost and labour intensive nature of apparel production (Perry and Wood, 2019). However, the global supply chain's blurring the differences between retail and wholesale brands remains under-researched.

Methodology

This interpretative qualitative study initially intended to conduct interviews with key informants of fashion wholesale and retail brands, as distinguished by Davies (1992). This was followed by a process of sampling, which began by using the key informant tactic for the selection of respondents (Rashid *et al.*, 2016). In this approach, the selection of respondents were conducted using a nonprobability, judgement sampling attitude, based on their influence on and experience in decision making in the fashion industry.

Once the interviewing process began with the first few participants from the fashion industry, it became apparent that it would be difficult to distinguish between retail and wholesale brands in the fashion industry, as almost all the retailers and brands based in the UK were involved in global sourcing and production and were expanding the store networks across the border and cultures (Picot-Coupey *et al.*, 2014; Rashid and Barnes, 2018). Based on this realisation, a decision was made to have the study look at an array of brands from retailers all the way to wholesale brands, incorporating various hybrid kinds of brands, such as multichannel retailers and design-led brands. In order to make the findings more robust, the researcher made the decision to look at the industry as a whole; this led to many important participants being selected from the broader fashion business, including suppliers as well as textile research and funding organisations.

Twenty-one semi-structured face-to-face interviews were conducted in the study. The key informants represented seventeen large-scale fashion retailers, manufacturer and textile research and funding organisations (see Table 1). Having a diverse range of primary informants (see table 1) ensured the availability of triangulated perspectives that also delivered data on the convergence and divergence of wholesale and retail brands (Dion and Mazzaolovo, 2016). The interviews were conducted to a stage where the data was at a point of saturation. Organisations that participated are not identified so that commercial confidentiality can be maintained (Rashid *et al.*, 2016).

Insert table 1 here

Existing literature, focused on retail branding (Burt and Davies, 2010; Martenson, 2007; Picot-Coupey *et al.*, 2014) supply chain management and re-shoring (Towers *et al.*, 2013), was used to develop the interview questions. Primarily, the questions

considered issues linked to the development and blurred character of the structure of retail and wholesale brands, linked to overseas manufacturing and whether retailers would consider re-shoring.

The step that followed the interview process involved an investigation into the retailers' history including where they sourced their materials from, where they manufactured the products and whether they manufacture their own products. Investigation also included views on whether the companies perceived themselves as retailers or as brands, whether they sold their own brands for sale or used other stores and channels. Depending on the participant's response, the next question related to the type of brand they perceived themselves as, and their perceptions regarding overseas manufacturing, re-shoring and designing of the product, and finally whether these had any implications on brand image and brand identity, reflecting brand's heritage.

The majority of interviews, lasting between 30 and 60 minutes, were conducted in the offices of the respondents in the UK. All responses were audio recorded and the data was transcribed. The data was then thematically evaluated using the template analysis method (King and Horrocks, 2010). The template analysis method comprised manual coding and categorisation using the full transcripts of the interviews to systematically recognise themes and patterns, which is referred to by King and Horrocks (2010) as a *meaning-making process*.

Findings

The findings are structured according to four key themes: using retail technology for direct access; retail own brands using a wholesale brand strategy to reach new markets; the shifting of resources by the global supply chain; and shifting within the global supply chain with specific reference to retailers moving into vertical integration.

Retail Technology for Direct Access

It has emerged from the research findings that one of the key factors blurring the differences between retail and wholesale brand strategies is the use of technology. Technology provides direct and easy access to new markets while challenging the conventional use of retail distribution channels, especially for brands that have been using a wholesale strategy. The benefit of using a multi-channel strategy is that wholesale brands no longer need to reflect the positioning and identity of department stores or independent stores. In other words, each department store and independent store is able to form its own identity, e.g., Bloomsdale may stock products that target a niche market, whereas Macy's may target a more mass market. For example, it was revealed in an interview with a representative of Company G, a British lifestyle brand, that the company traditionally sells different products in different department stores depending on the positioning and requirements of the department stores, i.e. fashionable products in John Lewis and premium branded products in Selfridges. However, by using a retail brand strategy online and within outlets, wholesale brands now have greater control of their brand equity, product margin, product marketing and product

merchandise. Nevertheless, based on the interviews, the wholesale brand strategy is still seen as the major method for wholesale brands to operate. Furthermore, a senior level representative of Company L, a components supplier (yarns and threads) that supplies to premium wholesale brands, and a respondent from Company G added that this makes it easier for brands that have traditionally operated a wholesale brand strategy by using third-party retailers. This is because distributing through third-party retailers means a loss of responsibility, which can be costly for brands that are not experienced in retailing.

“We are manufacturer or wholesale brands, and in wholesale strategy you are effectively renting the space on a profit-relating basis, and I would say that is the fastest-growing part of our business, in broader terms, but I suppose the strategy for us to go to the front of this was the significance of e-tail business (CEO, Company G).

The results from the interviews indicate that the increasing use of technology in retail environments has also given suppliers, e.g. motorcyclist apparel brands, the confidence to establish their own brand identity by having products listed under their own brand labels on their own website. This is deemed useful for suppliers that have no retail experience and are only establishing their own label identity as a side business, while their core business identity remains as apparel brand suppliers.

“So, if you go onto the [no name] website you can actually buy them directly there. So yes, we sell it online, which means people can visit our website, and they can see exactly what the price is, and they can order it online” (Non-executive director, Company P).

Furthermore, representatives of the supplying companies also subscribed to the view that, along with allowing the suppliers to establish their own online brand presence, this has also made it easy to promote British expertise. In other words, the suppliers now feel confident not only in establishing their own brand presence but also in having control over how and when they promote their British heritage, which is deemed important to their supplying brand because of the industrialized British history in textiles.

“[...] Another benefit of having an online facility is that we can promote the British technical aspect that we provide. We know that the customers do not care about where the product is made or about the technical skills, but we still promote it on our website as Britain still has a strong association with textiles and the industrial revolution; it’s a long history or pedigree that we try to flag,” (Non-executive director, Company P).

Wholesale Brand Strategy to Reach a New Market

Interviews conducted with the representatives of retail and wholesale brands (e.g. Companies A, B, E and F), which were originally established as retailers in the UK using an own brand strategy but are now using a wholesale brand strategy, indicated that fashion retail brands in the UK have been able to develop a reputation and build

trust through high profit margins and convincing third-party distributors to stock their own brands on their websites, e.g. ASOS. The expansion of retailers into a wholesale brand strategy, especially using the ASOS website, has allowed retail brands to expose their own brand products internationally and expand accordingly. Furthermore, the results also indicate that exposing retail brands through ASOS has allowed retail brands to promote their British heritage, as it is found that customers in other countries, e.g. the US and Australia, associate quality with a British fashion label when purchasing own brand labels online. In other words, retailers are implementing a wholesale brand strategy via online retailers as an international market entry. For instance:

“[...] we wholesale our brands to ASOS and other international online retailers such as Zalando, which is great because we can expose our brand, and if we feel like the brand is performing well in a certain country, we may even consider expanding it further through the physical store presence (Wholesale brand coordinator, Company A).

The results from the interviews also indicate that using a wholesale brand strategy gives retailers confidence in their own brand image, particularly with reference to how their brand is perceived by customers nationally. For instance:

“[...] when international customers recognise our name, it gives us confidence that our brand is right for that market. But this also has an impact nationally, for example, if a customer was not previously keen on our brand and they see our product on ASOS, it may actually change their perception and bring them back to us” (Wholesale brand coordinator, Company A).

Global Supply Chain Shift of Resources and Capabilities

It is apparent from all the interviews that one of the key drivers of the blurring between retail and wholesale brands has been the shifting of manufacturing resources, capabilities and investment to overseas countries. These resources involve financial, personnel, technological and organisational assets, while the capabilities involve firms' ability to execute and coordinate various aspects such as the actual space, distributing logistics and operations planning. Finally, the investment involves the machinery. The results indicate an agreement among respondents on how the shift in manufacturing took place almost 20 years ago and occurred mainly due to the increases in wages, housing prices, and the standard of living. In other words, people no longer wanted to work in factories and demanded higher wages. As a result, a number of manufacturers shifted; for example, some lifestyle brands that were also manufacturers in their own right (i.e. Companies G and H) along with being wholesale/lifestyle brands, moved some of their production to nearby countries and sub-contracted the majority of their products. Several benefits were identified with reference to shifting production to nearby countries overseas, e.g. Poland and Portugal. The benefit of shifting production to such countries was that these wholesale brands could still have control of their production facilities while operating their resources and capabilities at a lower cost basis. Another benefit is that the brand can continue associating with and promoting its brand heritage and also provide fast fashion. However, the interviews suggest that the

majority of wholesale and retail brands outsource their garment production through contracted suppliers, which means lower cost but also less responsibility. For example:

“About 20 years ago, the cost of manufacturing became so high that fashion brands/retailers had to do something about it, so they basically relocated offshore to various places. Some of them set up their own factories, so they basically moved their factories from here to there, but the vast majority just outsourced it all” (President of Apparel and Footwear, Company L).

Global Supply Chain Leads into Vertical Integration

Results from the respondents of Companies A and D, fashion brands that were originally established in the market as retailers but have expanded their business further by distributing their products onto other websites and even department stores, have indicated how the global supply chain has evolved, with retailers introducing vertical integration for the purpose of having control over the product and manufacturing, but also for the purpose of reducing the delivery lead-time (e.g. Topshop, River Island, JD Williams), which is linked to proximity. In this respect, retailers can now be regarded as manufacturers as well as wholesale brands. This also gives retailers the opportunity to promote their EU origin as a unique selling point, as most of the vertical supply chains are located at home or at nearby locations such as Italy, Portugal, Poland and Turkey. For instance:

“[...] we label ourselves as retailers, providing own brand strategy. But we are also manufacturers, so we manufacture our footwear range in Italy [...] which allows us to have more control on our product labels” (HR Manager, Company D).

In addition, the results also indicate that craftsmanship is something that can also be promoted by this vertical integration. However, the importance of this varies, depending on the brand's positioning and the country image. For instance, a premium fashion brand – originally established as a retailer but now with ownership of the manufacturing facilities and mainly known for wholesaling through the department store – proudly highlighted this about their retail brand.

“[...] we are a London-based company, and we started the business as a small clothing retail business, but then we grew the business as a global brand through our shoe labels, and so our brand is known for the best British design, and our products are sold in a range of places, including Bloomingdale's stores in New York; but in the UK, we are starting to focus back on our own retail stores. In addition to this, we are also now a manufacturer, with a factory of our own in Italy, offering heritage craftsmanship and luxury” (HR Manager, Company D).

Conclusion and Discussion

The objectives of this paper were as follows: first, to conduct a review of the existing definitions of retail and wholesale brands and interpret their evolution, and second, to analyse the industry's perception of the forces driving the blurring of retail and wholesale brands. This article aimed to discuss how the structures and boundaries between retail and wholesale brands have blurred in an attempt by brands to gain access to new markets, international recognition and control over profits and services.

According to Chaffey and Smith (2017) online retailing is the sales of goods and services via an interactive electronic communication network. This study contributes to the literature of online retailing and multi-channel retailing (Blázquez, 2014; Kent, 2016) with particular reference to how the difference between retail and wholesale brands has blurred in the context that online retailing is having an increasing impact on fashion businesses and on the structure of the fashion industry, which is based in the UK but operates globally. This approach allows fashion retail brands to establish global recognition by using a wholesale strategy on pure-play retailers, such as ASOS (see also Ashman and Vazquez, 2012; Moore *et al.*, 2010). In other words, retail brands now have access to a new global market. The study also contributes knowledge regarding the recognition of British brand identity that retailer brands are developing using wholesale brand strategy i.e. selling via a globally known British online retailer.

Moreover, the study also adds knowledge regarding the development of retailing technology that is allowing wholesale brands to establish a standalone recognition by having their own website along with selling their products via other online retailers; meanwhile, they are diminishing the intermediaries that previously contributed by selling the products to the customers. Furthermore, the findings also align with those of Fahy and Jobber (2015), who had suggested that the development of the Internet offered a new form of distribution medium, thus contributing to the literature of technology, retailing and distribution.

The study also adds knowledge to the literature of the global supply chain. Previously, Dicken (2015) identified how some wholesale brands, such as Hugo Boss, have shifted their manufacturing system overseas in order to achieve competitive advantages (Perry *et al.*, 2013). This study found that not only did wholesalers shift their manufacturing system overseas in order to achieve competitive advantages such as lower labour costs, but also how many retail brands now have ownership of the manufacturing units. One example of this is Hobbs, which now manufactures its own-labelled shoes in Italy using own craftsmanship. In other words, retailers are using vertical integration, which not only helps the brands save costs and be more efficient but also assists with quick response and acts as a form of a unique selling point. Using vertical integration as a unique selling point means that while the majority of customers in the UK do not care where the product is made (see Rashid *et al.*, 2016), retailers still have the flexibility to promote the European-made image should they wish to. Furthermore, blurring with reference to the supply chain has occurred, because while a brand like Hobbs is currently a design-focused premium brand that sells its products in numerous department stores, the brand was originally established as a retail own-brand, selling own-brand products in its own retail store; therefore, it is now difficult to identify whether a brand is a retail brand or a wholesale brand.

Ultimately the research challenges the existing conventions of distinguishing retail and wholesale brands. It is no longer relevant to consider these brand types as separate entities in the marketing literature, and instead of this 'vertical' categorisation of brands. Instead, we should instead view brands 'across' the sector, making a clearer differentiation between the retail brand as a 'service' and the products they sell simply as brands, rather than referring to the products as a retail brand. Of course, retail as a service is well trodden in the literature, but the point of this research is to focus on how we refer to the products as brands and the proposal is made that the concept of the retail brand product is largely obsolete.

Avenues for future research

1. To begin with, further research could use the projective technique to investigate how consumers associate country of origin with apparel fitting when making purchasing decisions.
2. Another future study could draw upon the notion of brand architecture and explore how fashion retailers develop and manage brand strategies, particularly in terms of brand identity and image.

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