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Abstract

Purpose – The purpose of this paper is to report on exploratory research that aims to contribute to knowledge on online branding, and the way in which the online channel is being used to support brands. The focus of this research is the top multi-channel UK fashion retailers.

Design/methodology/approach – Content analyses were performed on the web sites of a number of top fashion and clothing retailers, plus three supermarket chains with a strong presence in clothes retailing. An analysis of the extent to which the retailers were using their web site to provide online services and information provided a context for a more detailed analysis of online branding strategies, including communicating brand identity and presence, and building brand relationships.

Findings – Most top "non-value" fashion retailers offer transactions through their web site, offering extended opportunities for brand engagement and experience. While all fashion retailers achieve consistency of visual identity between the online and other channels, their use of the online channel to communicate brand values, and to promote brand relationships is underdeveloped. There is evidence of some innovative practice, but also scope for considerable further development of the notion of online branding. Research into online and multi-channel branding has a role to play in supporting this process.

Originality/value – This study makes an important contribution to the under-researched area of online branding, through a study of the online branding activities of top multi-channel UK fashion retailers.

Keywords Online operations, Brands, Fashion industry, Retailing, Brand management, United Kingdom

Paper type Research paper

Introduction

This article reports on an exploratory study into the online branding activities of top UK fashion and clothing retailers. By so doing it investigates two key aspects of e-commerce both of which have only received limited prior attention from researchers, online fashion retailing, and online branding.

Retailing fashion online was seen as unlikely to be successful in the early days of e-commerce, because of people's need to touch and try-on clothes and the social experience associated with clothes shopping for women. Nevertheless, the volume of clothes and footwear sold via the Internet has grown steadily, and online revenues for fashion good have been growing between 25-30 per cent a year since 2000 (IMRG, 2006). Early online (pure-play) and catalogue clothes retailers, such as LandsEnd.com, GreatUniversal.com, and Littlewoodsdirect.com are increasingly being jostled online by "brick" fashion retailers as these businesses develop their multi-channel strategy and build their presence in the online channel. These retailers have recognised the need to extend their brand presence and their service offering into the online channel in order to offer more choice and a more flexible brand experience to their customers.

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In line with the increase in consumer spend on fashion goods online, over the past few years there as been a gradual increase in the body of research associated with fashion e-tailing. Marciniak and Bruce's (2006) chapter on "Fashion e-tailing" is a useful summary; they indicate that much of the research in this area relates to consumer behaviour issues, and cross channel shopping behaviour. Other research has explored fashion web site design and quality, and fashion retailers' approaches to online strategy. Although brands and branding receive an occasional mention in some of these studies, none focus directly on online branding. The growing recognition of the value of brands, especially in the retail industry (Ailawadi and Keller, 2004) and the status of brands as one of the four most popular discussion topics within a fashion and style discussion forum (Thomas *et al.*, 2007) suggests that it may be timely to explore online branding in fashion retailing in more detail. In addition, there is evidence to suggest that brand knowledge has a direct and positive effect on intention to adopt an online retailer (Chen and He, 2003) and that brand familiarity influences purchase intention (Park and Stoel, 2005).

Online branding more generally (or e-branding, digital branding, internet branding, or i-branding as it has variously been labelled) has also received relatively limited attention. The academic literature is limited and is in a formative stage with little integration (Ibeh *et al.*, 2005; Merisavo and Raulas, 2004; Murphy *et al.*, 2003; Simmons, 2007). We define an online brand as: "a brand that has an online presence", and adapt Chaffey's (2008) definition of online branding to propose that online branding is:

> How online channels are used to support brands, which in essence are the sum of the characteristics of a product, service or organization as perceived and experienced by a user, customer or other stakeholder.

There are two possible reasons for the limited theoretical investigation of online brands and online branding. The first is the ambivalence concerning the role and significance of brands in the online channel. Some argue that in a digitised world, with information overload, brands are becoming ever more important, because they save the customer time by reducing their search costs and helping them to make choices in a world that is replete with choice, devoid of personal contact, and riddled with change (Rubenstein and Griffiths, 2001; Ward and Lee, 2000). The alternative point of view is that with a wealth of information at their fingertips, coupled with sophisticated search engines and comparison sites consumers can free themselves from the shorthand of brand (Rowley, 2004a). Other researchers have suggested that web experience, brand market share, and product category may affect the significance of brands online (Danaher *et al.*, 2003; Ward and Lee, 2000).

Another challenge to the study of online branding arises from the fact that online branding requires a review of established branding principles coupled with an understanding of the specific opportunities offered by the online channel. Accordingly, discussions of online branding, whether they involve academic analysis or practical advice and tips, tend to be hybrids of branding concepts, practice and strategy and the design and delivery of e-service and e-commerce experiences.

This article commences with a literature review drawing out key themes from the previous literature of both online branding and online fashion and clothes retailing. This is followed by a research methodology section that describes the selection of the web sites for analysis and the content analysis process that was undertaken. A findings and discussion section analyses the outcome of the content analysis. Finally, conclusions and recommendations are offered to draw together key insights from the research and make recommendations for further research and practice.

Literature review

In order to inform the research questions and research design for the study reported in this article, this literature review draws together key themes from two areas of knowledge, namely, online branding, and online fashion retailing.

Online fashion retailing

As interest in selling clothing online, and awareness of the importance of a well-designed online presence have emerged over the last few years, research interest in online retailing has developed. This research can broadly be grouped into three categories, exploring respectively, consumer behaviour, fashion web site design and quality, and online strategy.

The majority of research in the area of online fashion retailing has been concerned to better understand consumer behaviour, including the identification of online shopper characteristics and the examination of cross channel shopping behaviour. Goldsmith and Flynn's (2004) research on the psychological and behavioural drivers of online clothing purchase, showed that being an adventurous online buyer and a heavy catalogue shopper had the most impact on online clothing buying. Kim and Kim (2004) found that their transaction/cost factor and their incentive programs factor were important predictors of purchase intention. Similarly, Kim and Stoel (2004) confirmed the importance of transaction cost factors (e.g. credit card security, fast delivery time, privacy assurance, money back guarantees) over web site design features in perceptions of online clothing shopping attributes. A recent investigation into the consumer decision making styles of US college students in online apparel consumption suggested that online apparel shoppers were: quality conscious, brand conscious, fashion conscious, hedonistic shoppers, impulsive, and brand loyal (Cowart and Goldsmith, 2007). However, it is important to remember that not all consumer groups are the same; Kim and Kim (2004) suggested that demographic variables (gender, income, and number of children) were important predictors of clothing online purchase intention. Although, interestingly for the online channel, Workman and Caldwell (2007) confirmed that there was no evidence of any difference between groups in the "need for touch".

There is some evidence that brand familiarity and knowledge may influence engagement with the online channel. Park and Stoel (2005) found that familiarity with brands offered online, together with previous experience of shopping online, influenced perceptions of the risk associated with shopping online, as well as intentions to purchase online.

Other researchers have focused on web site design. For example, Siddiqui *et al.* (2003) suggested that aspects of web site design that concerned consumers included: web page design, level of interactivity, absence of information about fashion trends, and inconsistency across web sites. Some of these factors are also echoed in the study conducted by Merrilees and Miller (2005) in Australia in the context of an online department store. They conclude that e-tailing is primarily a functional activity with pre-eminent roles for interactivity, web atmospherics and navigability, but that users' perceptions of such functional characteristics are rooted in emotional brand associations, such as excitement or authenticity. They advocate that such emotional brand association should be used by e-tailers to improve future performance. A number of studies have examined the information components of clothes retail web sites. Different categories of retailers (e.g. multi-channel retailers, store e-tailers, and pure e-tailers) provide different kinds of information (Jang and Burns, 2004; Kim *et al.*, 2007). Jang and Burns (2004) suggested that pure play retailers focus on providing detailed information about their goods in order to reduce perceived risk associated with non-store shopping, whereas multi-channel retailers were able to offer a more convenient returns policy based on "return to store". Both Siddiqui *et al.* (2003) and Then and DeLong (1999) identified consumers' interests in the images of the online products, including opportunities to view from various angles, and displays with compatible items.

Research on the online strategy of online fashion retailers has a number of strands. Salmeron and Hurtado (2006) suggest that the strategic objectives of fashion retailers in their development of e-commerce provision are: increase in revenue; facilitation of purchase from consumers; and, most importantly for our purpose, amplification of brand recognition. Various stage models for the establishment of an Internet presence for fashion designers (Salmeron and Hurtado, 2006) and small fashion e-tailers (Ashworth *et al.*, 2006a, b) have been proposed. Marchiniak and Bruce (2004) conducted an extensive content analysis of 780 UK fashion retailer web sites, with a view to examining retailer characteristics and also establishing the relationship between levels of online involvement and fashion retailer type. Fashion designer retailers predominately use their web sites as an informational tool, whereas most of the transactional retailers were product specialist retailers who were multiple, independent, mail order or pure play retailers.

The research questions that are informed and inspired by this part of the literature review are:

RQ1. Is there a relationship between fashion retailer type (value, non-value, supermarket) and online and online branding strategy?

RQ2. Is there a relationship between fashion retailer type (value, non-value, supermarket) and information components on retailer web sites?

RQ3. Are top UK fashion retailers seeking to integrate the brand identity and brand experience across channels?

Online branding

There is a general recognition that the academic literature on online branding is limited and is in a formative stage with little integration (Ibeh *et al.*, 2005; Merisavo and Raulas, 2004; Murphy *et al.*, 2003; Simmons, 2007). The academic literature is complemented by a range of professional practice books, articles and web resources, such as Cocoran (2007) and Ries and Ries (2000). Much of the literature on online branding, whilst offering useful insights, is debate, case studies and practical tips. We seek to distil this here under three main themes: branding basics; online branding objectives; and, other online branding strategy issues.

Several authors have suggested that the principles of branding have changed very little as a result of the internet; online branding needs to build on and integrate with branding through other channels (Chen, 2001; De Chernatony, 2002; Clauser, 2001; Rubenstein, 2002). As demonstrated by Rowley's (2004b) analysis of McDonald's online branding, branding may start with creating and registering logos, brand marks, and brand strap lines, and creating brand awareness and presence, but long term, branding is the process of creating value through the provision of a compelling and consistent offer, (the brand promise) backed by a positive customer experience (the brand experience) that will satisfy customers and encourage them to return. This provides an opportunity for building brand relationships, which, in turn, deliver repeat business, allows the business to charge premium prices, consolidate the brand positioning and make it more difficult for competitors to launch a challenge. The branding process builds the value of the brand to the business, or its brand equity (Aaker, 1991; De Chernatony and McDonald, 1992; Doyle, 1998; Kapferer, 2004).

Tzokas and Saren (2004) suggest that the web is an appropriate channel through which to develop and maintain relationships with customers. Loyalty marketing strategies, including communication and two-way dialog, rewards, effective customer service and service recovery mechanisms, loyalty schemes, and online brand communities, are an important aspect of brand building (Cuthbertson and Bridson, 2006). However, online loyalty is dependent upon consumer trust (Harris and Goode, 2004), and trust is arguably even more important in the virtual world than it is in the real world because there is no personal interaction (Ibeh *et al.*, 2005; Ratnasingham, 1998), but, the bond of trust, especially in the depersonalised setting of the Internet is very fragile (Varadarajan and Yadav, 2002). One way forward is to view the Internet as one channel amongst many and to seek to understand the relationship between and distinct roles of channels in a multi-channel environment, and specifically to understand the contribution of different channels to brand relationships (Nysveen *et al.*, 2005).

Different businesses have different objectives for their online channel and different online branding objectives. The success of online branding depends on what the business seeks to achieve through its online branding strategy, and on the brand having clear online objectives. De Chernatony and Christodoulides (2004) suggest that many organisations undertake a phased development of online branding, starting with a basic site that secures online presence for the brand, and then gradually evolving their web site through offering greater opportunities for engagement with the brand through greater interactive opportunities, transaction facilities, and online communities. On the other hand, it is important to remember that in the online channel, marketing communication, service, and relationship building can all be delivered simultaneously. Dayal *et al.* (2000) suggest that: "on the world wide web, the brand is the experience and the experience is the brand". Dayal *et al.* (2000) also offer a different perspective on branding objectives through the concept of the brand promise. They suggest that businesses can make the following types of promises through the online channel: convenience, achievement, fun and adventure, self-expression and recognition, and belonging.

The selection of the best URL is important (Keller, 2003); there is widespread recognition that consistency between domain name and brand name can increase the likelihood of locating the brand web site, as well as reinforce familiarity with the brand (Hanson, 2000; Ifield and Winter, 2002). Failure to register domain names leaves the brand's image and thus the brand's equity susceptible to sabotage by competitors, adversaries and proactive entrepreneurs (Hanson, 2000; Ries and Ries, 2000).

In online branding, many organisations use a corporate brand web site as the anchor to their online branding strategy, since investing in corporate brands offers an opportunity to extend the brand over a wide range of products and services, and is therefore more efficient (Leitch and Richardson, 2003; Ward and Lee, 2000). A strong corporate brand can contribute to tackling the challenge of dealing with information overload and the resulting decline in media efficiency (Kollmann and Suckow, 2007).

Xie and Boggs (2006) see corporate branding in terms of the opportunity for building enhanced trust and relationships:

> Corporate branding facilitates customers' desire to look deeper into the brand and evaluate the nature of the firm. Trust in the products and brands the firm offers predisposes customers to accept its claims about other products and services.

The increasing importance of corporate brands brings in its wake greater emphasis on aligning what an organisation says, believes and does, or to put it another way integrated brand, communications, and experience strategies (Balmer and Gray, 2003). In addition, corporate brands (as opposed to product brands) not only have customers and retailers as potential audiences, but also employees, shareholders, government departments, suppliers, and other stakeholders (Hatch and Schultz, 2001).

The research questions that are informed and inspired by this part of the literature review are:

RQ4. How are UK fashion retailers protecting their domain names, and hence their brands?

RQ5. How are top UK fashion retailers communicating their brand identity and values in the online channel?

RQ6. What facilities do the top UK fashion retailers offer through their online channel to support the creation of positive brand experiences and to build brand loyalty?

In conclusion, there is no specific research into online branding in the fashion industry, and, limited empirical research on online branding. Research in this area has the potential to inform both further research and practice in relation to online branding, and online fashion retailing.

Methodology

This exploratory research aims to contribute to knowledge on online branding. The focus is the top multi-channel UK fashion retailers as defined by a recent Mintel (2007) report of the sector (see Table I). This sample was deemed appropriate to offer key insights into online branding. As shown in Table I, the sample includes a number of dedicated fashion retailers, together with other retailers, such as Bhs, Next and TKMaxx that also operate in other sectors, such as homeware, and, three supermarket chains that have a significant market share in fashion retailing. The Mintel list includes three fashion retail groups, Arcadia, Mosaic, and Alexon, each of which has a portfolio of retail brands that are separately promoted and therefore have separate web sites. A pragmatic decision was made to include exemplars from each of these groups,

Table I.
Retailers included in the study

	Operation	No of outlets	Sales (m excl tax)	Estimated clothing sales (m excl VAT)
Retail outlet				
Marks & Spencer	Adult and children's clothing	315	3,572	
Next	Adult and children's clothing	480	2,255	
Arcadia Group (inc. Miss Selfridge, Burton, and Dorothy Perkins)	Adult clothing	2,318	1,801	
Matalan	Adult and children's clothing	202	1,058	
TK Maxx	Adult and children's clothing	210	1,009	
New Look	Adult and children's clothing	570	922	
Primark	Adult and children's clothing	107	915	
Bhs	Adult and children's clothing	180	861	
Mosaic (Group) (inc Oasis, and Principles)	Womenswear	1,853	725	
River island	Adult clothing	200	595	
Peacocks/Bonmarche	Adult and children's clothing	837	569	
Monsoon/Accessorize	Womenswear	406	464	
H&M	Adult and children's clothing	112	483	
Mothercare	Babywear, maternitywear and childrenswear	225	411	
Alexon Group (inc Dash and Ann Harvey)	Adult clothing	1,251	326	
Supermarket retailers				
Asda	Adult and children's clothing	328		1,500
Tesco	Adult and children's clothing	585		1,045
Sainsbury's	Adult and children's clothing	250		225

Source: Mintel (2007)

so that such groups were appropriately represented, but did not over-dominate the analysis.

A content analysis of the web sites associated with each of the chosen brands, was conducted by using checklist that covered the following three themes and supported the collection of data relevant to the six research questions:

(1) online services and information;

(2) communicating brand identity and presence; and

(3) building brand relationships.

Content analysis is defined as "a research technique for the objective, systematic and quantitative description of the manifest content of communication" (Bryman, 2001, p. 178), or "any technique for making inferences by objectively and systematically identifying specified characteristics of messages (Bryman, 2001, p. 178). We considered the web sites as forms of communication and messages and we were seeking to identify a range of characteristics or attributes of these. Content analysis was selected as the most appropriate as it "is an approach to the analysis of documents and texts ... that seeks to quantify content in terms of predetermined categories and in a systematic and replicable manner," (Bryman, 2001, p. 177). However, since the literature search revealed no predetermined template or set of categories in this research it was necessary to both construct the categories and perform an analysis on the basis of those categories. In this process care and judgment were exercised in comparing and categorising web sites, which by their very nature are designed to be different and to support the differentiation of a specific business and brand from its competitors.

To be more precise the following stages have been taken in the analysis:

- An initial checklist was piloted with six web sites from a variety of different types of UK fashion retailer. This process was used to tighten the checklist of features around which data were collected.
- All web sites were analysed using the revised checklist. Because of the exploratory nature of the data gathering process, it was deemed necessary to revisit most of the sites to re-check details to be assured of their accuracy.

The data collection was conducted in April and May 2008.

Findings and discussion

The findings are reported and discussed by research question. This means that branding objectives, and online presence through information content, are discussed first and any differentiation between the categories value, non-value and supermarket are explored. Later sections focus more directly on branding issues associated with domain names, how brand identity and values are communicated online, and the use of approaches for building brand relationships:

RQ1. *Is there a relationship between fashion retailer type (value, non-value, supermarket) and online and online branding strategy?*

The key purpose of the analysis in this section was to develop an insight into web site objectives. All retailers view web sites as an arena for providing information about their company and their products to a range of audiences. Some also offer a transactional web site. A transactional web site offers greater opportunity for interaction with the brand through the online channel. Those sites that do not offer transactions are restricted in their brand building objectives to increasing brand awareness and establishing a brand presence in the digital arena. All top UK retailers are aware of and have acted on the need to establish an online brand presence, but some have wider objectives, which are delivered through the transactional nature of their web site, and through other features that are discussed below.

In order to investigate whether there is any relationship between fashion retailer type (value, non-value, supermarket) and online branding objectives, retailers were grouped on the basis of whether they offered transactional facilities or not, and on whether they were value, non-value retailers, or supermarkets. The "value" classification was conducted on the basis of brand straplines, or other statements about the brand promise or offer made on the retailer's web site. Monsoon/Accessorize was excluded from this analysis because it was not possible to trace any clear branding statement on its web site. Table II summarises this relationship and shows that all of the non-value retailers have a transactional web site, and none of the supermarkets have a transactional web site. Five of the ten value retailers do not have a transactional web site, and of the four that do, on various other indicators of positioning (such as style orientation and price) M&S, Oasis, and Ann Harvey would not be categorised as value retailers despite this word in their brand statements, and New Look and Peacocks offer online purchases for women's wear only.

In conclusion although all top UK fashion retailers have a web site, their business and branding objectives for that web site vary. In particular there is evidence of a divide between "value" and "non-value" retailers and supermarkets, with "non-value" retailers offering transactions, whilst many other retailers are either developing this facility or have yet to explore whether this is appropriate for their business. This has consequences for depth of brand engagement and experience.

RQ2. *Is there a relationship between fashion retailer type (value, non-value, supermarket) and information components on retailer web sites?*

All retailers are using their web sites to provide product information, but amongst the value retailers there is evidence of considerable variation in the extent of product information provided. For example, Asda offer detailed product information, and suggest "browse online/buy instore", Primark offer the opportunity to download the Primark brochure, and Bonmarche offer some limited product information. The other type of information that is often offered relates to fashion and style, and fitting and sizing, respectively. Fitting and sizing information, in particular, is essential for online fashion retailing, because the better the fit, the lower the level of returns; returns are a key operational consideration for online retailers. Most of the value (and non-transactional) retailers do not provide fitting and sizing guides (e.g. Matalan, TKMaxx, Primark, Peacocks, Bonmarche, Asda, Sainsbury's), whilst the transactional fashion retailers often provide detailed size guides for different items (e.g. M&S, Next, Burton, Dorothy Perkins, BhS, Oasis). The other type of information that might be expected on fashion web sites is information relating to the latest fashion and style trends. Those web sites showing product information implicitly show the latest style, but there is a surprising lack of other content on style and fashion. As Table I shows, many sites offer no fashion or style information. A few offer such information through

Table II. Types of information provided on UK fashion retailers web sites

	Company and financial info	Careers info	Store locator	Fashion and style	Fitting and sizing	Value	Transactions
Retail outlet							
Marks & Spencer	Y	Y	Y	N	Range of size guides	Y	Y
Next	Y	Y	Y	Collections	Y	N	Y
Arcadia Group							
Miss Selfridges	N	Y	Y	Collections	Y	N	Y
Burton	Y	Y	Y	Key trends	Range of size guides	N	Y
Dorothy Perkins	N	N	Y	Y		N	Y
Matalan	Y	Y	Y	Via trend news	N	Y	N
TK Maxx	Y	Y	Y	N	N	Y	N
New Look	Y	Y	Y	N	Y	Y	Y
Primark	Y	Y	Y	N	N	Y	N
Bhs	Y	Y	Y	Collections	Range of size guides	N	Y
Mosaic (Group)							
Oasis	N	Y	Y	Y	Y	N	Y
Principles	Y	Y	Y	N	Y	N	Y
River island	Y	Y	Y	"Create the look"	Y	N	Y
Peacocks	Y	Y	Y	"Latest looks"	N	Y	Y
Bonmarche	Y	N	Y	N	N	Y	N
Monsoon/Accessorize	Y	Y	Y	"Editor's choice" and "new arrivals"	Y		Y
H&M	Y	Y	N	N	N	Y	N
Mothercare	Y	Y	Y	N	Y	N	Y
Alexon Group							
Dash	Y	Y	Y	Latest look	Y	N	Y
Ann Harvey	Y	Y	Y	Latest look	Y	Y	Y
Supermarket retailers							
Asda	Y	N	Y	N	N	Y	N
Tesco	Not on clothes site	Y	Y	Get the look	N	Y	N
Sainsbury's	Y	Y	Y	N	N	Y	N

their “Collections” (e.g. Next, Miss Selfridge, Bhs) and “Create the look” or “Latest look” (e.g. River Island, Peacocks, Monsoon/Accessorize, Tesco, Dash and Ann Harvey) or “Fashion must haves” (e.g. Oasis), all of which show fashion items put together for create an outfit. Burton and Matalan offer some information on trends. Oasis offer an online magazine, *Oasis Magazine*, which includes “fashion solutions”, “top 5 trends”, and “fashion in film”, and Dorothy Perkins offers both a *Style Magazine*, and “*Gok’s World*”. As indicated in Table III, a number of sites offer an e-newsletter that gives fashion and style updates, but site visitors need to register to receive this newsletter.

Other information that was provided by a significant number of web sites was company and financial information, careers information, and store locations. The level of company and financial information varied. Many sites simply offered a short paragraph under “About us” clearly targeted to customers, however a few sites (e.g. M&S, the Mosaic Group, and Mothercare) offered a lot of financial and business information of the type that would be useful to investors. Careers information was offered by most retailers, and this typically included information about the company and the brand, opportunities and vacancies. The Matalan Careers web site was a separate site with innovative design using animated displays, and video clips. This information suggests that key audiences for the web site were customers, and, also potential employees, and in a few cases, investors and other stakeholders.

Store location information is a key link between channels (online and brick). Virtually all web sites provided a store locator, although in some instances this was essentially a list of store addresses, while in other instances (e.g. Burton) there was a map-based locator.

In summary, there is considerable variation between the extent of information provided on different web sites. Most offer basic company information and careers information. Store locators are also common, but vary in sophistication. Fitting and sizing information is offered by all transactional retailers only, and there is considerable variation in the fashion and style information provided on web sites over and above specific product information:

RQ3. *Are top UK fashion retailers seeking to integrate the brand identity and brand experience across channels?*

This question demands an exploration of both whether:

- brand identities are consistent across channels; or
- customers are encouraged or supported in switching between channels.

Online visual brand identities are predominantly consistent with corporate and in-store identities. Logo, colour palettes, and statements of brand values show a high level of consistently throughout the industry, suggesting that multi-channel business and branding strategies are the norm. All sites have brand logos on every page, and all use brand colours in text, menus and page backgrounds. Nevertheless the delivery of a consistent and joined-up brand experience is dependent on operational integration, and also specifically on the opportunities for customers to choose to channel switch at different stages in the purchase process.

Customers who start an engagement or purchase process through the online channel may seek to channel switch when they wish to complete a task or function that is not supported by the online channel, such as customer service and advice and

Table III.
Communication and brand relationships

	FAQs	E-mail contact	Tel contact	Postal contact	E-newsletter	Friend e-mail	Loyalty scheme	Returns to store
Retail outlet								
Marks & Spencer	Y	Y	Y	Y	Y	Y	N	Y
Next	Y	Y	Y	N	N	Y	N	?
Arcadia Group								
Miss Selfridge	N	Y	Y	Y	Y	N	Store card	
Burton	N	Y	Y	N	Y	N	Store card	Y
Dorothy Perkins	N	Y	N	N	N	N	Store card	Y
Matalan	Y	Y	Y	N	Y	N	Matalan card	NA
TK Maxx	N	Y	N	Y	N	N	N	NA
New Look	Y	Y	Y	Y	N	N	Store card	Y
Primark	N	Y	N	Y	N	N	N	NA
Bhs	Y	Y	Y	Y	N	N	N	Y
Mosaic (Group)								
Oasis	Y	N	N	N	Y	N	Store card	Y
Principles	N	Y	Y	Y	Y	N	Store card	Y
River island	Y	Y	Y	Y	N	N	N	Y
Peacocks	Y	Y	Y	N	Y	Y	N	?
Bonmarche	N	Y	Y	N	N	N	Bonus club	NA
Monsoon/Accessorize	Y	Y	N	N	Y	Y	N	Y
H&M	Y	Y	Y	Y	Y	N	N	NA
Mothercare	Y	Y	N	Y	N	Y	Store card	Y
Alexon Group								
Dash	N	Y	Y	Y	Y	N	N	N
Ann Harvey	N	Y	Y	Y	Y	N	N	N
Supermarket retailers								
Asda	Y	Y	Y	Y	N	Y	N	NA
Tesco	Y	N	Y	Y	N	N	Clubcard	NA
Sainsbury's	Y	Y	Y	Y	N	N	Nectar	NA

returns. Table III shows that many fashion retailers offer FAQs or help pages or notes for customers; often these relate to the purchase process and are therefore more common and extensive for transactional web sites. Beyond this, e-mail, telephone, and/or postal contact details are often, but, interestingly, not always given for customer service. Monsoon/Accessorize only give an e-mail contact point, and a number of retailers to not given a telephone contact (e.g. Burton, Dorothy Perkins, Matalan, Mothercare and Oasis).

The option to "return to store" is only realistic if there are a good number of store outlets, and most customers are likely to be able to visit a store, and is only relevant for those with transaction-based web sites. Many of these retailers allow "return to store", thereby delivering a multi-channel brand experience in which the channels are mutually supportive. Some (e.g. M&S, Burton, Bhs, New Look) also allow postal returns free of charge, thereby offering the customer another free and easy return option, but others (e.g. Dash, Ann Harvey) require the customer to pay postage for returns.

In summary, retailers have effectively executed the "marketing task", and some transactional retailers are well on their way to effective customer service and returns polices (e.g. M&S, and Principles) but others do not offer full contact options or a good range of free returns options. Some non-transactional retailers offer useful customer service contact points, presumably to allow enquiries about in-store items (e.g. H&M, and Asda).

RQ4. *How are UK fashion retailers protecting their domain names, and hence their brands?*

Table IV summarises the retailers" domain names and any links to.co.uk or.com variations on their domain name. It is evident that most retailers use their brand in their domain name, although M&S have resorted to the longer version of their name, Marks and Spencer, and Mosaic appears as "mosaic-fashions". Next, New Look, Principles and Peacocks have done well to register the.co.uk versions of domain names based on these common words, but they do not appear to have the registration for the.com equivalent, with various consequences as indicated in Table IV. Of the 29 domain names investigated, only nine had links between the.co.uk and.com versions of the domain names. A total of 18 of the domain names are.co.uk, while nine are.com. This evident lack of ownership of.com registrations poses challenges for some UK fashion retailers as they seek to expand into other countries.

In summary, brand is important in domain names, but there may be scope for UK fashion retailers to give more consideration to the protection of their brand online through extended domain name registration.

RQ5. *How are top UK fashion retailers communicating their brand identity and values in the online channel?*

As discussed above, good alignment of visual identity between channels is evident, but communication of values is rather more difficult to find. As summarised in Table V, few of the retailers offered a brand strap line or other statement of values on their home page. Most of the statements in Table V were located in and extracted from "about us" and "careers" section of web sites. Further, in the absence of clear brand strap lines in order to compile Table V it has sometimes been necessary to draw on a range of different statements, and there are varying level of consistency between these

Table IV.
Fashion retailers domain names

	Domain name	Link from.co.uk or.com alternative	Evidence of lack of ownership of.co.uk or.com
Retail outlet			
Marks & Spencer	www.marksandspencer.com	Yes	
Next	www.next.co.uk	No	.com leads to apple.com
Arcadia Group	www.arcadia.co.uk	No	.com not found
	www.misselfridge.com	Yes	
	www.burton.co.uk	No	.com – US web site with assorted content
	www.dorothperkins.com	Yes	
Matalan	www.matalan.co.uk	Yes	
TK Maxx	www.tkmaxx.com	Yes	
New Look	www.newlook.co.uk	No	Newlook.com is the site of Facial Plastic and Cosmetic Surgical Center
Primark	www.primark.co.uk	No	Primark.com timed out
	www.bonmarche.co.uk	No	Bonmarche.com – frontpage with picture
Bhs	www.bhs.co.uk	No	.com links to IT systems site
Mosaic (Group)	www.mosaic-fashions.co.uk	No	.com not found
	www.principles.co.uk	No	.com – religious web site
	www.oasis-stores.com	Yes	
River island	www.riverisland.com	Yes	
Peacocks/Bonmarche	www.peacocks.co.uk	No	.com – page with picture of a peacock
	www.bonmarche.co.uk	No	.com – page with a picture
Monsoon/Accessorize	www.monsoon.co.uk	No	Monsoon.com timed out
H&M	www.hm.com	No	.co.uk not found
Mothercare	www.mothercare.co.uk	Yes	
Alexon Group	www.alexon.co.uk	No	.com goes to a US site with similar products – looks amateur
Dash	www.dashfashion.co.uk	No	.com – domain for sale
Ann Harvey	www.annharveyfashion.co.uk	No?	.com goes to a US fashion site – not sure whether it is linked
Supermarket retailers			
Asda	www.george.com	No	.co.uk goes to a re-direction site
Tesco	www.clothingattesco.com	No (but tesco.co.uk leads to tesco.com)	.co.uk is under development
Sainsbury's	www.sainsburys.co.uk	Yes	

Table V. Fashion retailers branding and visual identity

	Brand colours	Brand values/strapline	Brand values on home page?
Retail outlet			
Marks & Spencer	Black, lime green and white	"Quality, value, innovation, trust service"	N
Next	Black and white	"Exciting, beautifully designed, excellent quality clothing and homeware; presented in collections that reflect the aspirations and . . . of our customers"	N
Arcadia Group			
Miss Selfridge	Black and white	"We are committed to offering our customers a unique, intimate and personal shopping experience" "passion, honesty, courage, respect"	N
Burton	Black and white	"versatile, up-to-date, affordable" "Good quality classic and contemporary clothing"	N
Dorothy Perkins	Black, white and, pale blue	"Accessible, aspirational and affordable" "Feminine, sexy, wearable and confident" "We design for everyone"	N
Matalan	Red, black and grey	"More value, more style, more quality" "expect more for your money at Matalan"	Y
TK Maxx	Red and white	"Top brands for 60 per cent less than on the high street"	N
New Look	Black and lime green	"Fashion for all" "always on trend, always in fashion and always in style" "talkable fashion" "fashion, value and choice"	N
Primark	Royal blue	"look good, pay less" "high fashion looks from a low budget stores" "get the look for less"	Y
Bhs	Black and white	"Modern living made easy"	Y
Mosaic (Group)			
Oasis	Blue	"aimed at fashion conscious 18-30 year olds" "fashionable, wearable, colourful" and "synonymous with quality, value and unique design"	N
Principles	White and purple	"making sense of fashion" "great quality and attention to detail . . . glamorous, versatile clothes that are a bit different"	Y

(*continued*)

	Brand colours	Brand values/strapline	Brand values on home page?
River island	White, black and yellow	"we're fashionable, focused and work hard to stay at the top of the high street"	N
Peacocks	Black, white and blue, some cerise	"exciting, value for money, on trend"(from www.designwales.org)	N
Bonmarche	Black and white	"real style, real women" "M is an established value retailer focused on selling affordable quality womenswear in a wide range of sizes"	N (on second page)
Monsoon/Accessorize	Darker and lighter lilac	No clear statement	n.a
H&M	Red, lighter and darker grey	"inexpensive and fashionable clothing" or "to bring you fashion and quality at the best price"	N
Mothercare	Light and dark blue	"Our mission is to meet the needs and aspirations of parents for their children worldwide"	N
Alexon Group			
Dash	White and blue	"practical and versatile clothing using quality fabrics in exclusive colours" "outstanding quality, luxurious feeling clothes that wash fantastically time after time … fit is generous and flattering"	N
Ann Harvey	Black and turquoise	"for women with curves, offering high quality, contemporary clothes … flattering, affordable, choice and value for money"	Y
Supermarket retailers			
Asda	Black and white	"Gorgeous" (Asda values – best value retailer)	N
Tesco	Pink, black and grey	"Fashion at Tesco" "Get the look" (Tesco values – "every little bit helps")	N
Sainsbury's	Difficult to tell	"Fantastic quality clothing at great prices … something for everyone"	Y

Table V.

statements. Primark, for example, have a clear focus, with "look good, pay less", "high fashion looks form a low budget store", and "get the look for less" which are all different statements of the same values, but it is more debateable whether the various statements from Oasis, Burton, Dorothy Perkins, and New Look, and Bonmarche communicate a focused brand position.

An interesting diversion, worthy of brief comment are the colour palettes of these retailers. As Table V shows there is a clear dominance of black and white, sometimes coupled with another colour. This palette is especially preferred by the top five retailers, and online the relatively neutral palettes provide plenty of scope for display of products to take "centre-stage".

In summary, brand visual identity is well-managed on UK fashion retailers web sites, and is consistent with corporate brand identities communicated through other channels, but there is scope for greater focus on the communication of brand values.

RQ6. *What facilities do the top UK fashion retailers offer through their online channel to support the creation of positive brand experiences and to build brand loyalty?*
Table III draws together a number of indicators that explore approaches to providing communication and brand relationship building opportunities. The first four columns in Table III have been discussed under *RQ3*. Contact and communication options are the first step towards a relationship; other options online are e-newsletters, the opportunity to recommend a product to a friend by sending and email, and loyalty schemes. E-newsletters, for which customers register, provide contact details of potential customers, and an opportunity to share new trends, fashion information, style advice, and product news. Around half of the retailers offer an e-newsletter. H&M's newsletter is supplemented by a video pod cast and a trend report. Registration for an e-newsletter with Burton, earns a 10 per cent discount on next purchase. Although they do not offer an e-newsletter, Dorothy Perkins has an online magazine, River Island sends e-mails of fashion and news updates, and Mothercare sends news e-mails.

Some retailers provide an option that invites the customer to recommend a product to a friend, thereby encouraging recommendations across social networks, and emulating the social nature of fashion choices. Next have a recommend a friend option; by sending a friend's contact details to Next, when the friend makes a purchase the recommender receives £20 + credit.

Loyalty schemes are only operated by Matalan, Bonmarche (Bonus club), Tesco (Clubcard) and Sainsbury's (Nectar). Benefits of membership of Bonmarche's Bonus Club include discount mailing, bonusday events, monthly prize draws, instore promotions, exclusive offers and a discount on *BM Magazine*. Eight other retailers operate a storecard or branded credit card. Online information is provided on these cards for customers, and cards can be used for purchases where appropriate. This generates customer data for the retailer, and, specifically customer data relevant to the on-line channel, which may support profiling and segmentation. Nevertheless these services are promoted very much as another product and do little to persuade the customer that they are part of a brand community.

In addition, during the data collection period, Matalan was running a customer service survey online, TkMaxx was collecting data on customers' favorite trends for summer through a short pop-up questionnaire, and River Island was running the

“Style insider” competition where customers can load photographs of themselves and vote on “who is a style icon”.

An exception to the norm is Mothercare. They suggest that their mission “is to meet the needs and aspirations of parents for their children worldwide” and they seek to do this by providing a range of parenting information and a link to Gurgle.com. Their resource centre includes information on pregnancy, parenting, and baby, as well as an “ask the expert” feature; there are buying guides that provide advice on a range of products. Customers can e-mail a friend with regards to a product item, and can also add items to a gift list or save them in their “wish list”. Further, there is the opportunity for customer’s to share reviews of products. All of these features contribute to the sense of a community around the brand, and with Mothercare taking a role in supporting that community.

In summary, fashion retailers provide contact points, and many encourage registration for e-newsletters, but beyond this the use of tools to explicitly build brand relationships or brand communities are limited. A few retailers use friend recommendation, loyalty schemes, customer surveys, pod casts, and competitions, but there is scope for much more development in this area.

Conclusions and recommendations

Despite the early concerns that clothes and fashion did not lend themselves to online retailing all of the UK non-value fashion retailers now have transactional web sites, and all top UK value fashion retailers have a web site that they use for communication and to establish an online brand presence. All retailers use their web sites to establish a brand presence and to communicate with key audiences. There are, however, some variations in emphasis on different audiences (customers, investors and staff), and in the extent and type of information provided. Information that supports customers in moving between channels, such as store finders, and telephone, postal, and e-mail contact details are common, but not universal. For transactional retailers this supports multi-channel operation, including “return-to-store”. Fitting and sizing information is offered by all transactional retailers. Fashion and style information over and above specific product information is limited to images of new collections on many web sites, although some offer magazines that can provide more style and fashion information, and a few innovators offer additional advice on style, fit and trends.

Brand visual identity online is consistent with visual identity through other channels, and is applied consistently throughout web sites, but communication of brand positioning or values is rarely on the home page and often tucked away in “about us” or “careers” sections of the web page which are not particularly likely to be visited by customers. Brands are always used as part of the domain name, but the extent of registration of different related domain names (e.g..co.uk,.com and other country registrations) would bear further investigation. Finally, whilst a few retailers use friend recommendation, loyalty schemes, customer surveys, podcasts, and competitions, there is scope for much more development of initiatives to build brand relationships, and brand communities.

UK fashion retailers have embraced the online channel and their web sites establish online presence and brand awareness, but there is still work to do in developing dynamic and exciting brand presences online. They need variously to:

- take measures to register associated domain names and protect their brand online;
- communicate their brand values more explicitly and prominently through their web sites to improve positioning through the "online shop window";
- develop two-way communication between retailer and customers, and customer to customer; and
- further advance the notion of using the web site as a venue and forum through which retailers build brand community.

This exploratory study has contributed to the process of understanding on-line branding in practice. The study is, however, restricted in to top UK multi-channel fashion retailers. There is considerable scope for further work on online and digital branding amongst other groups of retailers. This might embrace:

- SMEs in the fashion sector with an online presence;
- top multi-channel retailers in other countries in North America, Asia and Europe; and
- online only fashion retailers

In addition, it would be interesting to explore online branding in other sectors, such as banking and travel. Initial exploratory studies in these other contexts, might usefully be followed by more in-depth investigations, including:

- An in-depth investigation of how retailers and other service providers are managing and protecting their domain names and their brand online.
- A more extensive investigation of the extent to which and means by which retailers and other service providers communicate brand values online.
- Further research into the use and effectiveness of loyalty schemes for multi-channel retailers in building brand loyalty, relationships and community.
- A more complete analysis of brand architectures and how these are represented online, concerning, for example, issues of global brands, sub-brands, and co-branding.
- A longitudinal study to consider the development path of online branding strategy; this study offers a one point-in-time snapshot. Will all retailers continue in the online channel and if they do, what measures will they take to develop the brand experience and brand communities?
- A comparative analysis of online branding associated with multi-channel retailers and service suppliers across a number of sectors, such as banking, supermarkets, and travel agents.

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